Set Up a Transaction Coordinator With the Right Access

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A TC touches every file in your office but shouldn't own any of them. Three setups, and the one you pick decides what they see.

Introduction

There's no "TC" role in Pipeline. You build one out of a user and a set of permissions, and that's a good thing — the person who coordinates twelve agents across two offices needs something very different from the one who works a single agent's listings.

The whole setup turns on one question: **how much of the office should this TC see?** Answer that and everything else follows. Support has three standard shapes, and every TC in every account fits one of them.

When to Use This

- You're bringing on a transaction coordinator and right now they've been logging in as your agents to upload paperwork.
- Your TC only handles some of your agents, and you don't want them in everyone else's deals.
- You've hired an outside or independent TC and your other files need to stay private.
- Your TC can't create a transaction, or can't upload a document, and you're not sure which box turns that on.
- Two TCs split your roster and each should see only their own agents' work.

Why This Beats Sharing an Agent's Login

The shortcut everyone reaches for first is handing the TC an agent's username and password. It works for about a week, and then it quietly ruins the thing Pipeline exists to protect. Every upload is attributed to the profile it came from — so when your broker asks who sent the addendum, the answer is the agent, forever, whether they were in the building or not.

Give the TC their own profile instead. It costs nothing, the activity history stays truthful, and you get something a shared login can never give you: the ability to take the access back when they move on.

1. Decide How Much of the Office the TC Should See

This is the whole decision, and it's worth two minutes before you touch a setting. There are three setups.

Set them up as an agent with no admin permissions, then add them to each transaction as an assistant. The TC sees only the files you put them on, and nothing else in the account. It's the tightest of the three, and it's the one to pick when the TC works a defined set of deals or when they're an outside contractor. The trade-off is upkeep — someone has to add them to each new transaction.

Make them an admin with View All in every location. The TC sees every transaction in the account without being added to anything. Pick this when the TC genuinely coordinates the whole office. The trade-off is reach: they can see it all, including deals you might not have meant to share.

Make them an admin with View All in one location. You create a location for that TC's book of business, move the relevant agents or transactions into it, and grant View All there and nowhere else. The TC sees everything in their slice with no per-file upkeep. This is the sweet spot for offices with two or more TCs splitting a roster — a location each.

> Locations don't have to be physical offices. They're just a way to group users and transactions, so a "location" can be a team, a TC's book, or any other split that's useful to you.

2. Add the TC as Their Own User

Every setup starts the same way — the TC needs a profile of their own before any of this is possible.

Add the agents and staff on your team so each person can log in and work in Pipeline under their own account.

See Adding a User

3. Grant the Permissions a TC Actually Works With

Access decides which files the TC can open. Permissions decide what they can do once they're in — and a TC who can see everything but change nothing will be back at your desk within the hour.

The three that matter most for coordination work are **Create transactions**, so they can start a file; **Upload docs**, so they can get paperwork in; and **Assign docs to transactions**, so what they upload lands where it belongs. Grant them in each location the TC works, since permissions are set per location and one that's checked in your main office does nothing in the branch.

Decide exactly what each person can see and do in Pipeline, location by location.

See User Permissions

> Leave **Add checklists to transactions** unchecked unless you've thought about it. Granting it lets the TC see every checklist template in the account — so if any of your templates are proprietary or office-only, that one box is how they get out.

> One thing only View All unlocks: commenting on a document somebody else uploaded. Without it, a user can only comment on their own uploads. If your TC needs to leave notes on your agents' documents, that's a reason to choose one of the View All setups.

4. Put Them on the Files They Handle

This is the move for the first setup — the TC has no admin permissions, so they see a transaction only once they're added to it. Add them as an assistant rather than an agent and they can work the file without being credited for the sale.

Tag a user as an assistant on a transaction — they help with the file without taking sales credit or commission.

See Agent Assistants

> That exclusion is usually the reason offices choose this setup: an assistant doesn't take sales production or commission on the transaction, so your financial reports stay clean no matter how many deals the TC touches.

If the person you're setting up works for one agent rather than the office, that situation has its own article — including how to catch up the files the agent already has open.

An agent's assistant needs that agent's files and nothing else. Add them to each transaction and the rest of the office stays invisible.

See Give an Assistant Access to Just That Agent's Files

5. Or Give Them View All Where They Need It

For the other two setups the TC is never added to a file. You grant one permission —**View all transactions for this location** — and every transaction in that location opens to them. Grant it in every location for a whole-office TC, or in exactly one for a TC with their own book.

A location admin runs the day-to-day inside the locations they're given — reviewing docs, managing checklists, and seeing every transaction there.

See Admin / Staff (Location Admin)

Going with the one-location setup means creating the location first, then moving the right agents or transactions into it.

Add a Location to give an office, team, or group its own users, transactions, and permissions.

See Adding a Location

6. Give Them the Checklist Access They Need

A TC lives in checklists, and none of the setups above decide what happens when they check a task off. That's a separate grant with a consequence worth knowing before your TC starts working.

A transaction coordinator lives in your checklists. One permission decides whether they can actually work them.

See Give a TC Exactly the Checklist Access They Need