Agents FAQ

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Agents get the permissions their admin grants — usually creating transactions, uploading docs, and assigning them. Answers to the common questions about what agents can see, self-assigning helpers, and giving agents more access.

What can an agent see?

Their own transactions — the ones they're assigned to. Agents don't see other agents' transactions unless an admin grants View all transactions, which turns them into a location admin. That's why agent access keeps everyone focused on their own deals.

What permissions should a new agent get?

The recommended baseline: create transactions, upload documents, assign docs, and assign checklist templates. From there you can add options like changing status or listing/selling agents on their own transactions. See Agents for the full list.

Can an agent assign an assistant to their transaction?

Only if they can change agents on their own transactions. The "Change listing/selling agents of own transaction" permission lets an agent add or remove other people on transactions they're on. Without it, an admin makes those assignments. Agents can't remove themselves from a transaction.

Can I give an agent more access without making them an admin?

Yes — grant individual permissions. Optional permissions like changing transaction status or adding checklists open up more without admin reach. Just avoid View all transactions, Review docs, and Delete any docs — those are admin-level and expose every agent's data.

Does an admin need a separate agent account?

No — it's one login. A user can be both an admin and an agent on their own transactions from the same account. See Admin / Staff (Location Admin).

Learn More

Agents see and manage their own work: their transactions, their documents, their checklists, and nothing they don't need.

See Agents

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.