Agents

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

Introduction

Most of the people on your account are agents, and for good reason. It's the right fit for anyone whose job is their own deals rather than everyone else's, which in a brokerage is very nearly everybody.

Agent isn't a locked role with a fixed set of abilities sitting behind it. It's the starting point: a user with no admin-level reach, whose access you then build up to match what the person actually does all day. Two agents on the same account can be set up quite differently, and that's normal. What holds across all of them is the boundary. An agent's view is the work they're part of rather than the whole office, so nobody has to read past three hundred files to find their own.

An agent's screen shows them their own deals and then stops, which is less to learn on the first day and less to get wrong later. Nothing about it is permanent, either. An agent's access is a set of checkboxes you can revisit any afternoon, so it's fine to start people lean and open things up when the job asks for it, rather than trying to guess at setup.

How It Works

An agent's access is defined by the permissions an admin turns on for them. There's a recommended baseline, a few optional add-ons, and a clear line of permissions that should stay with admins.

Recommended Agent Permissions

For a typical agent, we recommend starting with:

- **Create transactions** — create transactions (but not change them once created).
- **Upload documents** — upload docs directly or email them to their maildrop address.
- **Assign docs to transactions** — assign unassigned documents they uploaded to transactions they can see.
- **Assign checklist templates to transactions** — apply checklist templates to transactions they can see (without checking off or editing tasks).

Optional Agent Permissions

Depending on how your team works, you can also grant:

- **Change listing/selling agents of own transaction** — add or remove other agents on their own transactions (they can't remove themselves).
- **Change transaction status** — change the status, close date, and automatic expiration date on their own transactions. Often an admin permission, but it can suit some agent workflows.
- **Assign checklist templates to transactions** — add checklists to a transaction they're involved with.

What Agents Shouldn't Have

Some permissions grant access to every agent's data in a location and are meant for admins, not agents — chiefly **View all transactions**, **Review docs**, and **Delete any docs in this location**. Granting **View all transactions** is exactly what turns a user into a location admin. If someone genuinely needs that reach, make them a location admin instead. See Admin / Staff (Location Admin).

Where the Checkboxes Live

None of this is a role you assign. Each item is a checkbox on the person's profile, granted separately for every location they work in — so an agent fully set up in one office starts from nothing in the next one.

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

See User Permissions

Frequently Asked Questions

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).