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 their own unassigned documents 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.
- **Add checklists 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

Agents FAQ

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. See Agents FAQ.