Decide What Agents Can Change on Their Own Deals

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How much rope do your agents get on their own files? Three separate controls answer that, and mixing them up is why the setting you're looking for seems to be missing.

Introduction

Offices usually arrive at this with a specific ask — *let them mark a deal fell through but not closed*, *stop them renaming transactions*, *let them enter their own deals but not delete them*. Some of those are one checkbox, some are a company-wide switch, and one of them isn't possible at all.

Knowing which is which saves a lot of hunting. There are per-user permissions, set person by person and location by location. There is one company setting about the inactive statuses. And there is the path an agent takes when they can't do something themselves, which is a real part of the design rather than a failure of it.

When to Use This

- You want agents to enter their own transactions but not delete anything.
- You'd like agents to mark deals as fell through without also letting them close deals.
- An agent moved a pending deal back to active and you want to stop that happening again.
- Agents keep asking you to fix transaction names and MLS numbers and you're wondering whether to just give them the permission.
- You're setting up a new office and deciding how much agents should be able to touch.

1. Set the Per-User Permissions

Most of what you want lives here, on each user's profile, granted per location. The ones that matter for this question: whether they can create transactions at all, whether they can change a transaction's status, whether they can change the listing or selling agents on their own transaction before it goes pending, and whether they can download a backup.

Permissions decide what someone can do to a transaction: create it, edit its fields, change its status, or delete it. You set them per user, per location.

See Transaction Permissions

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

See User Permissions

2. Decide the One Company-Wide Status Setting

Separate from the per-user permission is a single account setting: whether agents may move a transaction into the closed, terminated, and expired statuses. It's one switch for all your inactive statuses at once.

That's the answer to the most common request in this area, and it's a no: you can't let agents mark a deal fell through while keeping them out of closed. The setting works by category, and the three categories travel together. Offices that need the distinction either give agents the whole set and audit, or keep the whole set with admins and take the requests.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses

> Because the behaviour follows the category rather than the status name, this setting is really a consequence of how your status list is built. See Build a Status List That Matches How Your Office Works

3. Know What Can't Be Restricted

Two limits worth naming plainly so you don't spend an afternoon looking for the switch.

An agent who can change statuses can change them in any direction, including moving a pending deal back to active. There's no way to allow forward moves and block backward ones. Where offices care about this — and they do, because it quietly erases the record of a deal that died — the fix is a workflow rather than a permission: teach the team to spin off a New Offer instead of reverting the status.

The same all-or-nothing shape applies to admins: change-status permission can't be limited to particular statuses, so any admin who can set one can set them all.

A contract dies, the property goes back on the market, and every page of listing paperwork is still perfectly good. New Offer moves you forward without rebuilding the file.

See Deal Falls Through, New Offer on the Same Listing

4. Use the Request Path for Everything Else

When an agent hits something they can't do — rename a transaction, correct an MLS number, fix a close date, change the agent on a side — Pipeline's answer is that they email an admin from inside the transaction. That's not a workaround; it's the intended route, and it keeps the change with someone who can see the consequences.

Some offices formalize it by naming one admin who owns those requests, which stops the same correction being made twice.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

> The permission that lets someone edit transaction names and MLS numbers on existing transactions is the admin-level **view all transactions** permission for that location — which also shows them every deal in the office. It's a bigger grant than it looks, and usually not the right answer for an agent.

5. Leave Deletion and Location With the Master Admin

Two things sit above all of this and stay there. Deleting a transaction and changing which Location a transaction belongs to are master-admin actions, and no per-user permission opens them up.

That's deliberate — both are hard to undo and both affect other people's reporting — and it's worth telling your admins so they stop looking for the checkbox.

Access decides who can open a transaction and see what's inside it — and in Pipeline, that comes down to who's on the transaction and who can view everything in its location.

See Transaction Access