Transaction Access FAQ

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Access comes from being added to a transaction or from a location-wide admin permission, and outside parties don't get a login. Answers to the common questions about why an agent can't see a file, sharing a single transaction, and access after a transaction closes.

Why can't my agent see a transaction I added?

They're not on the transaction yet. An agent only sees transactions they've been added to as a listing agent, buying agent, or assistant. Even if the file shows up in your admin search, the agent won't see it until you add them to it — or until they have the *View all transactions for this location* permission (which is meant for admins, not agents).

Can I give someone access to just one transaction?

Yes — add them to that transaction as an agent. Adding an in-house agent as a listing or buying agent grants access to that one file without exposing the rest of the location. That's the right tool when you don't want to give someone location-wide visibility.

Can an outside agent, attorney, or client log in to see a transaction?

No. Outside (co-op) agents and other third parties can be listed on a transaction as contacts, but they don't get a Pipeline login and can't open the file. If someone truly needs to work in Pipeline, they have to be added to your account as a user first.

Why did my agent lose access to a transaction after it closed?

Closed transactions leave the agent's active view. Once a transaction moves to a closed status it drops off the Transactions List, so agents may feel they've "lost" it. The file still exists and can be found by searching. If agents need to keep adding documents to closed files, that comes down to their permissions and status — reach out and we'll help you set it up.

Can two admins both have full access to the same transactions?

Yes. Any number of users can hold the *View all transactions for this location* permission, and every master admin already sees all transactions account-wide. Grant the location permission to each admin who needs full visibility.

An agent's access keeps reverting to view-only. Why?

That's usually a permissions question, not a glitch. What an agent can change on a transaction depends on the permissions their admin has granted and Pipeline's built-in rules for each field. If access seems to change on its own, contact us with the agent's login email and a transaction name so we can look at the specific setup.

Learn More

See Transaction Access and Transaction Permissions.

Still Have Questions?

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