Transaction Access

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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.

Introduction

A transaction in Paperless Pipeline is visible to a specific set of people and to nobody else. Most of the puzzling moments in an account trace back to that one sentence: a file an agent swears has vanished, a deal a new coordinator can't find, a login that works fine and shows an empty list.

Access is about visibility. It's whether you can open a transaction at all and see the dates, documents, checklists, and contacts inside it. That's a different question from permissions, which decide what you're allowed to do once you're in, and the two get tangled because someone can hold plenty of permissions and still not see a particular file. Visibility follows where a transaction lives and who's on it, which is why a change in access is usually something small and local rather than something wrong with the account.

So when a transaction seems to have disappeared, it's almost always still sitting in the account. Being taken off a file, or never having been added to it, looks exactly like the file being gone, and neither one is something you broke. Ask whoever manages users in your office to put you back on the transaction, and the deal turns up where you expect it.

How It Works

Pipeline grants access at the transaction level for agents and at the location level for admins. Both hang on a transaction's location, so access always follows where the transaction lives.

Who Sees a Transaction

Person	What they can see
An agent added to the transaction	The transactions they're on, as a listing agent, a buying agent, or an assistant. Being added is what puts a file on their Transactions List and lets them open it, so a brand-new transaction reaches an agent once someone adds them to it. An agent who isn't on a transaction doesn't see it at all, even in the same office.
A user with *View all transactions for this location*	Every transaction in that location, whether or not they're personally on it. That same permission is what makes someone a location admin.
A master admin	All data across the entire account, in every location, automatically.
An outside (co-op) agent, attorney, or other third party	Nothing. They appear on a transaction as contacts, but they don't have Pipeline access and can't log in to view the file. Someone who genuinely needs to open transactions goes into the account as a user first.

Admin Access Stops at the Location Line

Admin access works one location at a time. A user who can view all transactions in one location but not another counts as an admin only there, and sees only that location's transactions. Grant the permission for each location where the person needs full visibility.

Access Gets Them In, Categories Decide What's Inside

What a person can see *within* a transaction — which documents, in particular — also depends on their role and the permission category on each doc. Access opens the transaction; categories fine-tune what's visible once they're in.

Give a User Access to Every Transaction in a Location

> Grant the *View all transactions for this location* permission so a user can see all of that location's transactions, not just the ones they're on.

> **Who Can Do This**: A master admin, or a user with the *Create users and locations* permission.

To give a user access to every transaction in a location:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].

2. Click [Manage Users].

3. Search for the user, then click their name (or click the [Gear] and choose [Edit User]).

4. Scroll to the Permissions section and check **View all transactions for this location** for each location where they need full access.

5. Click [Save Settings].

The user can now see every transaction in the locations you selected. Because this permission also marks them as a location admin, grant it only to admin staff — never to regular agents, since it exposes every agent's files.

> **Good to know**: To give an *agent* access to a single transaction, add them to that transaction as a listing or buying agent instead — that grants access to just that file without opening up the whole location.

Transaction Access FAQ

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. See Transaction Access FAQ.