Transaction Permissions FAQ

Last Modified on 09/04/2026 11:16 am EDT

You set permissions per user and per location, a few actions belong to the master admin alone, and Pipeline adds its own field rules on top. Answers to the common questions about closing transactions, deleting them, downloads, and editing names or MLS numbers.

Why can't my agent close or change a transaction's status?

They need the *Change transaction status* permission. An admin grants it on the user's profile, per location. To let agents move transactions all the way to closed, terminated, and expired, a master admin also has to turn on the company-wide *Allow agents to change transaction status to closed, terminated, and expired* setting.

Who can delete a transaction?

Only a master admin. Deleting a transaction can't be granted to any other role — it's reserved for master admins for security reasons. The same is true for deleting notes on a transaction and changing a transaction's location.

Can agents download transactions?

No — downloads are admin-only. For security, non-admin agents can't download transactions, since those files can contain sensitive information. Admins with the right access can.

How do I let an agent edit a transaction's name or MLS number?

Grant them *View all transactions for this location*. Editing the Transaction Name or MLS / Transaction Number on an existing transaction is an admin-level action, so the agent needs that permission for the location. A non-admin agent can also email an admin from within the transaction to request the change instead.

Can an agent add another agent to their own transaction?

Yes, with the right permission and timing. An agent with *Change listing / selling agents of own transaction* can add or remove agents on their own transactions while the transaction is active or in a listing status. Once it reaches a pending status, they can't — an admin has to make the change.

What's the difference between an agent, a location admin, and a master admin?

It's the scope of what they can do and see.An agent works their own transactions; a location admin has admin-level permissions within specific locations; a master admin has every permission across the whole account. See the role guides for each in [Master Admin](), [Admin / Staff (Location Admin)](), and [Agents]().

Why can't an agent change a specific field, even with permission?

Pipeline protects some fields once a transaction is underway. On top of the permissions you grant, certain fields lock down after a transaction is closed or once commissions are entered. See Why Can't an Agent Update a Transaction Field? for the field-by-field breakdown.

Learn More

See Transaction Permissions and Transaction Access.

Still Have Questions?

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