Transaction Permissions

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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.

Introduction

Two people can be inside the same transaction and still not be able to do the same things to it. Permissions are why.

Access decides whether you can open a transaction; permissions decide what you're allowed to do once you're inside it. They're granted deliberately and they're granted narrowly, which is why an agent who can start a deal often can't change it afterwards, and why the same coordinator can run one office and be an ordinary member of another. On top of whatever your office grants, Pipeline holds a few fields closed on its own once a deal is far enough along, because a closed transaction with commissions on it isn't a record anyone should be editing casually.

So when something you expect to do isn't there, it's usually a question of what's switched on for you in that location rather than anything you've done wrong or anything broken in the account. Whoever manages users can see exactly which abilities you hold and turn on the one that's missing. And where a field is closed because of where the deal stands, no permission is involved at all, which saves hunting for a setting that doesn't exist.

How It Works

Every transaction action maps to a permission. Some are everyday agent abilities, some are admin-level, and a few belong to the master admin alone.

Grant Them Per User, Per Location

You grant permissions to a user for each location they work in, so the same person can have different abilities in different offices. A user's permissions travel with them into every transaction in that location.

What Each Permission Gives

Permission	What it lets someone do	Level
Create transactions	Start new transactions, but not change them afterward on their own.	Agent
Upload documents	Upload files directly, or by emailing their maildrop address.	Agent
Assign docs to transactions	Attach their unassigned documents to transactions they can see.	Agent
Assign checklist templates to transactions	Apply a checklist to transactions they can see.	Agent
Change transaction status	Update status, close date, and expiration date on their transactions.	Agent
Change listing / selling agents of own transaction	Add or remove other agents on their own transactions, while the transaction is active or in a listing status.	Agent
View all transactions for this location	See and edit every transaction in the location. It's also what makes a user a location admin.	Admin
Delete any docs in this location, **Review docs**, **Mark docs as entered**	Document-management controls across the location.	Admin
Fully manage checklists and templates	Check off, edit, and manage all checklists.	Admin
Create users and locations	Add and edit users and locations.	Admin
Download company-wide backups	The one account-wide permission, for transaction coordinators and admins.	Admin

The admin permissions grant broad reach, so they belong with admin staff and never with regular agents. A handful of actions have no checkbox anywhere and belong to the master admin alone: deleting transactions, deleting notes on transactions, changing the location of an existing transaction, setting up transaction statuses, transaction labels and document labels, and managing billing and account plan changes.

Where Pipeline Decides for You

Not every field answers to a permission. Once a transaction reaches a closed status or has commissions entered, Pipeline holds certain fields closed on its own, whatever you've granted. If an agent can't change one specific field, see Why Can't an Agent Update a Transaction Field?

Grant a Transaction Permission to a User

Turn a specific ability on or off for a user, one location at a time, from their profile.

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

To grant a transaction permission to a user:

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 or uncheck the permission for the appropriate location.
5. Click [Save Settings].

The change takes effect right away for that user in the location you set.

Allow Agents to Close, Terminate, and Expire Transactions

One company-wide setting controls whether agents with the *Change transaction status* permission can move transactions all the way to closed, terminated, and expired statuses.

Who Can Do This: A master admin.

To allow agents to close, terminate, and expire transactions:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Find the **Allow agents to change transaction status to closed, terminated, and expired**option.
3. Check it to let agents set those statuses, or leave it unchecked so only admins can.
4. Click [Save Settings].

When it's unchecked, agents with the *Change transaction status* permission can still move transactions through active statuses, but only admins can close, terminate, or expire them.

When No Permission Covers It

The master-admin-only actions listed earlier have no checkbox anywhere, which is why hunting through a user's permissions for them turns up nothing. Somebody in your account already holds that role, and asking them is usually faster than looking for a setting that was never there.

The master admin sits at the top of your account — full access to every location, every transaction, and the settings no one else can touch.

See Master Admin

Transaction Permissions FAQ

Permissions are set 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. See Transaction Permissions FAQ. If an agent can't edit a specific field, see Why Can't an Agent Update a Transaction Field?

Transaction Permissions Troubleshooting

Running into a problem? Start here.

- Why Can't an Agent Update a Transaction Field?