Use a Transaction to Store Files That Aren't Deals

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Independent contractor agreements, license renewals, mentorship agreements — the paperwork that isn't a deal still needs a home with real permissions. A transaction can be that home.

Introduction

There is no way to attach a document to a person in Pipeline. A user's profile carries their name, their role, and their license number, not their signed ICA. And the Reference page, the obvious next guess, is the shared library: every user in the account can open everything on it.

What's left is the container that already does everything this job needs. A transaction has access rules, permission categories, a checklist, a full history, and a place in your monthly backup. Offices have been using transactions as file cabinets for years, and support recommends it.

The work is entirely in the setup: who is on the transaction, which permission category each document goes into, and which status it sits in. Get those three right and the rest of the office never knows the files exist.

When to Use This

- You need somewhere to keep signed independent contractor agreements where the rest of your agents can't read them.
- You want to track license and continuing-education expirations for every agent, with a reminder before they lapse.
- You put agent paperwork on the Reference page and then realized everyone in the account can see it.
- You went looking for a way to attach a document to a user's profile and there isn't one.
- Your team agreements, W-9s, or office records are sitting in a shared drive with no permission control and no audit trail.

Why This Beats the Reference Page

The instinct is to drop these on Reference, because Reference is where company documents go. It's the wrong shelf: Reference is deliberately open to the whole account, so the moment an ICA lands there, every agent can read every other agent's terms. There is no per-document visibility control on that page.

A transaction inverts that. Nobody sees it unless they're on it, and even the person who is on it can be blocked from individual documents by permission category. You get the privacy Reference can't give you, plus a checklist for the renewal dates and a history showing when each file arrived.

1. Decide Who Should See the Files

This is the whole design, and it's one question: who gets added to the transaction? For company-wide records like blank policy forms, add nobody — admins see everything anyway, so a transaction with no agents on it is an admin-only cabinet. For per-agent files, add only that agent, and the rest of the office stays out.

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

> Watch the location, not just the transaction. Anyone with **View all transactions** for the location these files live in will see them regardless of who's assigned. If that's a longer list than you'd like, give the files their own Location.

2. Give the Files Their Own Location

Offices with more than a handful of these create a Location for them — *Agents & Personnel*, *Office Records*, whatever fits — and grant it only to the staff who handle HR. It keeps the files out of every branch's transaction list and makes the permission question a one-time decision instead of a per-transaction one.

Add a Location to give an office, team, or group its own users, transactions, and permissions.

See Adding a Location

3. Create One Transaction Per Agent

One transaction per agent is the shape most offices land on, because it makes the per-person privacy automatic and it gives each agent's paperwork its own checklist and its own history. Name them so they sort together and never get mistaken for a deal — *HR — Dana Reyes*, *Personnel — Dana Reyes*, something with a consistent prefix.

If you'd rather group by document type than by person, that works too: one *Agent ICAs* transaction with no agents added holds them all, admin-only.

Add a new transaction to start tracking a listing or sale in your company's Pipeline account.

See Adding a Transaction

4. File the Sensitive Docs in the Right Permission Category

Adding the agent to their own HR transaction is convenient — they can upload their renewed license themselves — but it means they can read what's in there. The permission category is how you keep the parts they shouldn't see out of reach: file those under **Office** or **Private** and the agent on the transaction still can't open them.

Two things decide who can see a document: whether the person can get to the transaction it lives on, and which permission category the doc was filed under.

See Document Access

5. Track the Dates With a Checklist

The reason to keep these in Pipeline rather than a folder is that Pipeline can chase the dates. Build one onboarding checklist and one renewal checklist as templates, apply them to each agent's transaction, and the license expiration, the E&O renewal, and the CE deadline all land on your Tasks page with due dates.

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates

6. Put It in a Status That Still Gets Backed Up

These transactions never close, which creates a real problem: your monthly backup picks up transactions whose status sits in an inactive category, so a file parked in an active status is never in the backup. Offices solve it with a purpose-built status — *Admin Use Only*, *Personnel*, *Office File* — created under a **Closed** category. That takes the transaction off everyone's active list and puts it in the next backup at the same time.

The category is what does the work here, not the name you give it.

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

See Transaction Statuses

> You can deactivate that status so it doesn't clutter the dropdown your agents use day to day, then briefly turn it back on when you're setting up the next one.

Every month, Pipeline builds a downloadable copy of your account so you always have an offline record of your transactions and documents — yours to keep, whether you're just being cautious or planning ahead.

See Monthly Backups