See Pipeline the Way Your Agents See It

Last Modified on 11/10/2026 12:21 pm EST

An agent opens the same Home page, the same transactions and the same profile you do, and finds a narrower version of each. Know what drops out on every page, and you can answer "will my agent see this?" before anyone has to ask.

Introduction

Sooner or later someone in your office asks whether an agent can see a figure, a message, or a document. The worry is usually about the other side of an in-house deal, or about something said between staff. Answering it from memory is harder than it sounds, because nothing on your own screen tells you what's missing from theirs.

The short version is that an agent sees their own work and not the office's. Their Home page counts their share, their Transactions page lists the deals they're on, and inside a transaction each task, document and message carries its own audience. Most of what changes from one agent to the next is what they can do, not what they can see. The Edit Transaction page is the one place where their permissions change the view itself.

Walk it page by page and the rules turn out to be few, and each one is a setting you control. The work is knowing which setting sits behind each gap, so you can set it once rather than explain it every time.

When to Use This

- An agent on an in-house deal asks whether the other side's agent can read their documents or their messages.
- An agent says they can't see an email or note that you're looking at on the transaction.
- An agent can't change a transaction's name, MLS number or close date, and asks why the field won't take an edit.
- An agent wants to download their own transactions or run an office report and can't find the option.
- An agent is getting reminders about tasks that aren't theirs, or isn't getting reminders at all and can't turn them on.

1. Read the Home Page as an Agent Reads It

An agent's Home page has the same tiles as yours, counted over what their access reaches. Closings and tasks due today cover the transactions they're on, and Unassigned Documents shows only the docs they uploaded themselves. Billing and plan usage sit in Admin / Settings, where only a master admin goes, so none of it reaches an agent. The Admin & Support contact on the left menu is the same for everyone, and it's where an agent looks when they need you.

To check it in your own account, sign in to an agent-only profile under an email alias. Run Two Pipeline Logins From One Inbox sets one up.

Your Home page opens on a row of live counts: closings this week, tasks due today, docs waiting on you — so you can see what needs attention before you click into anything.

See Stat Tiles

2. Know Why an Agent's Transactions List Is Shorter

An agent's list holds the transactions they've been added to, as a listing agent, a buying agent or an assistant, and nothing else. A file they created and weren't put on, or one they've only emailed into, doesn't appear. The permission that widens the list to a whole location is View all transactions for this location, and granting it makes the person a location admin.

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

3. Expect Fewer Tools Around the List

Downloads are admin-only. An agent can't download a transaction spreadsheet, a full transaction, or the monthly backup, since those files can carry what an agent isn't meant to see. The Reports page is the admin surface too. When your office runs the Commission Module, an agent pulls their own figures from Your Commissions in their personal profile. The Add Transaction button appears only for an agent who holds Create transactions, and without it there's no way for them to start a file.

Agents see and manage their own work: their transactions, their documents, their checklists, and nothing they don't need.

See Agents

4. Open a Transaction and Notice What Isn't There

Everyone gets the same sections, from the Info at the top down to the notes and sent emails. Each one shows what that person's role gives them access to. Admin Info is the exception an agent never meets at all. It's visible to admins only, so an agent can neither read it nor change it. That makes it the place for staff detail such as fees or a title company note.

See and update the information that makes up a transaction — its dates, prices, agents, docs, and more.

See Transaction Details

5. Give Each Agent Only the Tasks That Are Theirs

Every task carries a visibility setting, and a task set to Admins or to an @mention that doesn't name the agent is missing from their checklist. It's also missing from their Tasks page and their reminder email. Set it on the checklist template and every transaction inherits it. Show Each Person Only the Tasks That Are Theirs works through the three layers in full.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility

6. File Each Document Where the Right Side Can Open It

A listing agent sees Listing, Sale and Public docs, plus Private docs they filed themselves. A buying agent sees Buyer, Sale and Public docs, plus their own Private docs. Office docs are for staff alone. So the listing agent on an in-house deal can't open what's filed under Buyer, and the category you pick at upload is what decides it. Keep Each Side's Documents Private on an In-House Deal covers the dual-sided case.

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

7. Know Which Messages an Agent Can Read

An agent sees the notes and emails they sent themselves. They don't see an admin's, another agent's, or a co-listing agent's on the same deal, and no setting widens that. Mail that came in follows the same shape: a received email is visible to the person whose maildrop address took it in, and to admins. To bring an agent into a message, add them as a recipient or reply from inside Pipeline. Tasks you append to an email follow task visibility, so an agent who receives it sees only the tasks they'd see on the transaction. Keep a Note or Email Off the Agent's View covers the private checkbox and the other routes.

Every note you add and every email you send from a transaction lands in one running log at the bottom of the page.

See Notes & Sent Emails

8. Know Which Fields an Agent Can Change

Edit Transaction is where one agent's view differs from the next. The Transaction Name or property address, the MLS or Transaction Number, the Transaction Label and Total Commission are admin-only, and Location is for the master admin. Status and the listing, expiration, acceptance and close dates open up with Change transaction status. Custom Fields stay open to any agent on the transaction. Other fields lock once the deal closes, once commissions are entered, or once a CDA is generated. Decide What Agents Can Change on Their Own Deals sorts out which of those are yours to set.

When an agent can't change a certain field on a transaction, Pipeline is doing its job — limiting edits by the agent's permissions and by built-in rules that protect a transaction as it moves forward.

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

9. Set the Profile Settings Agents Can't Set for Themselves

An agent's personal profile is shorter than yours. Agents can't turn their own daily task reminder on or off. You set it for them from Manage Users. The daily activity email is for admin-level users only. The staff recipients setting does nothing for an agent, because the Staff list needs permission to view all transactions.

Start each day knowing exactly what's due — Pipeline emails you a rundown of the tasks that are overdue, due today, and due tomorrow.

See Daily Task Reminder Emails

10. Treat an Assistant as an Agent Without the Credit

Tag someone as an assistant and they keep the same reach on the file an agent would have. What changes is the

money: an assistant isn't credited with sales production or commission on that transaction. The tag is per transaction, so the same person can be an assistant on one deal and the agent of record on the next. Give an Assistant Access to Just That Agent's Files covers setting one up for a producer.

Tag a user as an assistant on a transaction — they help with the file without taking sales credit or commission.

See Agent Assistants