Keep Each Side's Documents Private on an In-House Deal

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

Both agents work for you, and neither should see the other side's commission. One transaction handles that — the permission category on each document is what draws the line.

Introduction

An in-house deal puts your listing agent and your buyer's agent on the same file. Most of the paperwork should be visible to both. Some of it absolutely shouldn't: an escrow demand showing the other side's commission, a referral invoice, a communication log.

The thing to understand first is that being assigned to a transaction is not what gives someone access to its documents. The permission category on each document is. That single fact answers almost every question in this article, including the one people ask most: no, you don't need two transactions.

So a dual-agency deal lives on one transaction, with each document filed under the category that matches who should read it. Where this stops working is a real limit worth knowing before you build a process on it, and it's the last step here.

When to Use This

- Both sides of a deal are your own agents and you don't want them seeing each other's numbers.
- An escrow demand or CDA shows the other side's commission and one agent shouldn't be reading it.
- You're about to create two transactions for one in-house deal to keep the paperwork apart.
- An agent can see something they shouldn't, or can't see something they should.
- You want a commission invoice on the file that no agent can open at all.

Why This Beats a Second Transaction

Splitting an in-house deal into two transactions feels safe and costs you twice — you're billed for both, your unit counts double-report the same sale, and the two halves of one deal stop being findable from each other. It also doesn't actually solve the problem, since each agent would still need access to the shared documents and you'd be maintaining two copies of them.

Categories do the separating without any of that. One transaction, one record of the deal, and a per-document decision about who reads what — made at the moment somebody files the document, which is when they know the answer.

1. Keep the Deal on One Transaction

Add both agents to the transaction, each on their own side. Pipeline reads the sides from that, and each agent's view of the documents follows from which side they're on — not from anything you have to configure per person.

2. File Each Document Under the Category That Matches Its Audience

Every document gets a permission category when it's assigned, and the category is the whole of the visibility decision:

- **Listing** — the listing agents and office staff. The listing side's confidential paperwork.
- **Buyer** — the selling agents and office staff. The buying side's confidential paperwork.
- **Sale** and **Public** — both sides plus staff. Anything mutual: the contract, the disclosures, the inspection.
- **Office** — staff only. No agent sees it, ever.
- **Private** — the person who uploaded it, plus admins.

So the escrow demand showing listing-side commission goes under Listing, the buyer's own commission paperwork goes under Buyer, and the fully executed contract goes under Sale where both agents can work from it.

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

> Agents only see the categories their side allows, which quietly does most of the work for you: a listing agent filing a doc can only choose Listing or Sale in the first place.

3. Move Anything Already Filed Wrong

Categories aren't set in stone. Click the gear beside a doc and choose**Edit Doc** to change its category, and the visibility changes with it — immediately, for everyone.

When an agent has filed a run of documents into the wrong category, don't do them one at a time. Check the boxes beside the docs on the transaction and change the permission category for the whole selection at once. An admin can do this even to documents already marked Reviewed.

4. Know the One Thing Categories Can't Do

Categories separate the two *sides* of a deal. They can't separate two agents on the *same* side — there's no way to show a document to one listing agent and hide it from another, because they read the same categories by definition.

When you need that, the options are narrower: file the document as Private so only the uploader and admins can open it, or email it directly to the one agent who should have it rather than leaving it on the transaction.

> This comes up most often around CDAs, and there it's usually a non-issue — agents can't view CDAs at all, and each agent sees only their own financial information on a transaction.