Manage Both Sides of a Sale in a Single Transaction

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Your office has the listing and one of your own agents brings the buyer. One transaction holds the whole deal — and permissions keep each side out of the other's paperwork.

Introduction

An in-house deal, sometimes called dual-sided, is one where your office represents the seller and the buyer on the same sale. It's the deal that raises two questions at once: do I put this in one transaction or two, and if it's one, what stops my listing agent from reading the buyer's file?

The answer to the first is one transaction, and it's the answer support gives nearly every time. The answer to the second is that separation in Pipeline comes from permissions, not from separate files: every document carries a permission category that decides who can open it, and every task carries a visibility setting that decides who can see it. Set those two things and the two sides work the same transaction without ever seeing each other's side of it.

What follows is the setup for that, in the order it actually has to happen. Pipeline can't scope anything by side until it knows who's on each side.

When to Use This

- Your office listed the property, and now one of your own agents is writing the offer on it.
- You went to add the buying side as its own transaction and Pipeline told you the address or MLS number is already in use.
- Your buyer's agent says they can't upload anything to the file — it isn't in their transaction list.
- You're about to put both sides in one file and want to know whether your listing agent can read the buyer's paperwork.
- You want to know whether an in-house deal gets billed as one transaction or two.

Why This Beats Two Separate Transactions

The instinct is to open a second transaction — one file for the listing, one for the buy — because separate files feel like the safe way to keep two agents apart. It isn't, and it costs you. Two transactions burn two against your monthly quota instead of one, split a single sale's history across two records that no report will ever reunite, and Pipeline usually stops you anyway: the address or MLS number is already in use by the first one.

One transaction is what Pipeline is built for here. The whole deal keeps one address, one timeline, and one audit trail, and it counts once toward your quota. The two sides stay apart because you scope the documents and the tasks — which is stronger separation than two files would give you, and it's the setup the rest of this article walks through.

> There's one honest exception: commissions. A transaction carries a single Commission Summary and a single CDA, so if each side genuinely needs its own CDA to send to title, one file can't produce that. In that case create the listing transaction, put it in a Pending status, and spin off the buying side as a New Offer —

> the two stay linked and can share the MLS number. See New Offers.

1. Add the Transaction Once, Not Twice

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

Add it the way you always would, for the property — not one per agent and not one per side. This single file is where both sides of the deal live.

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See Adding a Transaction

2. Assign Agents on Both Sides

Put the right agents on each side of a transaction so the deal is credited correctly and everyone can open the file and work it.

This is the step that makes the deal dual-sided, and it's the one that has to come first — Pipeline scopes documents and tasks by side, so until both agents are on the file there's no side for it to scope anything to. Check **Listing** for the agent representing the seller and **Buying** for the agent representing the buyer, on the same transaction.

It's also the answer to the most common complaint on these deals: the buyer's agent who says they can't upload. An agent can only work a transaction they've been added to, so until someone assigns them, the file isn't theirs to touch.

Put the right agents on each side of a transaction so Pipeline credits the deal correctly and everyone can open the file and work it.

See Assign Agents

> Who can add that second agent depends on where the deal is. An agent with permission to change the listing or selling agents on their own transaction can do it themselves while the file is still in an Active or Listing status. Once it moves to **Pending**, that door closes and an admin has to make the change — which is why it's worth assigning both sides before the offer is accepted rather than after. See Transaction Statuses.

3. Confirm Pipeline Sees Both Sides

Pipeline figures out whether you're on the listing side, the buying side, or both — automatically.

You don't set the side; you check it. Once agents are on both sides the transaction shows `L+B` next to its name in your Transactions list, and that's your confirmation the deal registered as dual-sided. If it still reads `L` or `B`, an agent is missing from one side and step 2 didn't finish.

Worth confirming before you move on, because side isn't only a label — checklists auto-apply on status *and* side, so a transaction Pipeline can't read the side of won't get the right checklists.

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See Transaction Sides

4. Sort Each Side's Documents Into Permission Categories

Here's the first half of the separation, and the part people underestimate: a document's permission category isn't a filing label, it's an access rule. It decides who can open the document, and it's the only thing standing between your buyer's paperwork and your listing agent.

Give each document the category that matches who should be able to see it:

- **Listing Docs** — the listing agent and admins.
- **Buyer Docs** — the buying agent and admins. Your listing agent can't see these.
- **Sale Docs** — both in-house sides. This is the shared middle: the contract and anything both agents legitimately need.
- **Private** — whoever uploaded it, and admins. Reach for this when two agents on the*same* side shouldn't see each other's notes.
- **Public** — everyone on the transaction.

The rule of thumb that keeps you out of trouble: default each side's paperwork to its own category and promote a document to **Sale Docs** only when both sides genuinely need it. It's easier to widen access later than to explain why an agent saw something they shouldn't have.

> If a batch of documents landed in the wrong category, you don't have to fix them one at a time — you can change the category on several documents at once.

> You can't grant a listing agent access to **Buyer Docs** — there's no permission that opens that category to the other side. If your listing agent genuinely needs a document, move it to a category they can reach, such as Sale Docs. Admins and master admins see every category regardless.

5. Scope Each Side's Tasks With Task Visibility

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

This is the second half of the separation. Pipeline scopes documents and tasks independently, so locking down the docs does nothing to the checklist — a listing-side task sits in plain view of your buyer's agent until you set its visibility. Scope each task to the side it belongs to and each agent gets their own to-do list inside the shared file.

Visibility also drives reminder emails, so scoping the tasks is what stops each side being nagged about the other's work.

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

See Task Visibility

> The classic failure here runs the other way — someone scopes every task to the listing side, then wonders why the buyer's agent opens the transaction and finds no checklist at all. If a side is staring at an empty checklist, task visibility is the first thing to check. Bear in mind that on a deal with a checklist for each side, both sets of tasks can land on the one transaction, so it's worth a look for overlapping tasks before your agents work the list.

6. Keep Client Contacts Out of the Shared Record

One thing does not scope by side, and it surprises people: Contacts. Anyone on the transaction sees every contact on it, regardless of which side they're on and regardless of how carefully you've set everything else. There's no setting that changes this — so your seller's phone number is visible to the agent representing the buyer.

If that's fine for your office, nothing to do. If it isn't, keep the sensitive parties out of the Contacts section altogether and put their details in a document instead, filed in the permission category for the side that should have them. It's the same trick as step 4 — you're borrowing the document system's access rules to get separation that Contacts can't give you.

> Worth checking before you add a client to a dual-sided file rather than after. Adding a contact is the one move on these deals that quietly reaches across both sides.