Transaction Sides

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

Introduction

Somewhere on a deal you have to know which side you're on. Most people go looking for the field where they set it.

There isn't one. A transaction's side comes from the agents on it, which is information you already entered when you put your own people on the listing or buying side of the deal. Pipeline reads that and labels the transaction to match, and the label moves if the agents change. It works this way so the two can't disagree: a file that claims to be a listing while carrying only a buyer's agent would be wrong in a way nobody would ever catch.

Nothing to set means nothing to get wrong, and the label ends up solid enough to filter your list by or to hang an auto-applied checklist on. And if the side reads wrong, you're not hunting for a side field that got set incorrectly. Change who's assigned to which side of the deal, and the label follows.

How It Works

Sides come straight from the agents assigned to a transaction — no manual tagging required.

How Sides Are Detected

Pipeline looks at the in-house agents on the transaction. If it has listing agents, the side is Listing. If it has buying agents, the side is Buying. If it has both, the side is Listing & Buying. Assigning agents is part of creating or editing a transaction — see Adding a Transaction.

The Side Indicator

In your Transactions list, the side shows as a single letter next to the transaction name: `L` for Listing, `B` for Buying, and `L+B` for both. Hover over the letter to see the full name.

Filtering by Side

You can narrow your Transactions list to just one side using Filter — handy when you want to see only your listings or only your buyer deals.

Auto-assigning Checklists by Side

Because Pipeline knows the side, admins can auto-assign checklist templates by side (along with status and label). That also frees up the Label field for other classifications — property type, for example — instead of using it to track the side.

Filter Transactions by Side

> Use Filter on the Transactions page to show only listing, only buying, or both-sided transactions.

Who Can Do This: Any agent or admin viewing the Transactions list.

To filter transactions by side:

1. Click [Transactions] in the top navigation bar.
2. Click [Filter] above the list of transactions.
3. Open the "Side" dropdown and choose the side you want.
4. Click [Filter Results].

The list updates to show only the transactions matching the side you chose.

Transaction Sides FAQ

Sides are set automatically from the agents on a transaction. Answers to the common questions about how sides are decided, what L and B mean, and why a transaction might show no side. See Transaction Sides FAQ. Representing both sides on one deal? See the use case Manage Both Sides of a Sale in a Single Transaction.

Ways to Use Transaction Sides

See Transaction Sides at work inside a bigger job:

- Manage Both Sides of a Sale in a Single Transaction