Managing Both Sides of a Sale Within a Single Transaction (Dual-sided Transactions)

SUMMARY

When your office has both the selling and the listing sides of a transaction (a dual-sided deal), you can manage the two sides within a single transaction. Pipeline's permission system allows you to control who can see which side's docs.

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Create a Transaction

1. **Create the transaction as usual.**
2. **Designate both listing and selling agents.**
3. **Click [Save Transaction].**

Both listing and selling agents can view the transaction, receive daily task reminders, email docs, add contacts, view checklists, and more. They may also upload or assign docs to the transaction if they have been granted that permission.

Learn How to Set User Permissions →

Viewing Docs

When agents or admins assign docs to a transaction, they are required to give each doc a specific Category Permission. Category Permissions control whether listing agents, selling agents, or both will be able to view that doc.

Agents will only be able to access docs filed under the Permission Categories that their role in the transaction gives them access to. For example, a listing agent will be able to view docs categorized as Listing Docs or Sale Docs while a selling agent can view docs categorized as Buyer Docs or Sale Docs. When an agent is uploading docs, they'll only be able to select Permission Categories to which they have access.

Doc Permissions

Admins can see all docs regardless of the permission category of those docs.

Listing Agent:

- Listing Docs
- Sale Docs
- Private Docs (they created only)
- Public Docs

Selling Agent:

- Buyer Docs
- Sale Docs
- Private Docs (they created only)
- Public Doc

Admin:

- Listing Docs
- Buyer Docs
- Sales Docs
- Private Docs
- Public Docs

Checklist Task Visibility

Visibility of checklist tasks can also be set so that agents only see tasks designated to their agent type. For example, a task with the visibility set to "Listing agents" can only be seen by listing agents.

Tasks can be set to be visible to admins, listing agents, selling agents or both listing and selling agents.

Learn How to Set Task Visibility (Task Assignment) →

Admins can see all tasks regardless of the tasks visibility setting.

Managing Both Sides of a Sale in a Single Transaction

In this Pipeline Pro webinar, see how simple it is to properly secure and manage your dual-sided transactions in Pipeline.

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