Auto Applying Checklists to Dual-sided Transactions

SUMMARY

The Dual-sided option allows you to set checklists to be auto-applied to transactions where your office represents both sides of a transaction. Learn more about Managing both sides of a sale within a single transaction (dual-sided transactions) →

Apply the"Dual-sided" Option

The Dual-sided option auto-applies a checklist to transactions that have both internal listing and selling agents designated. To apply the Dual-sided option:

1. **Click your name in the upper right corner then [Admin / Settings].**
2. **Click [Checklists] from the left menu.**
3. **Click [Add Template].** Alternatively, click the [Gear] then [Edit Template] to alter an existing template.

4. **Click "Automatically apply this checklist to transactions".**
5. **Select the Dual-sided option from the "Based on Side" dropdown list.**
6. **Click [Save Template].**

If a transaction with a listing agent later has a selling agent added, checklists with the dual-sided option checked will be auto-applied if the location, status and/or label parameters match.

The dual-sided option is additive and won't override existing auto-apply rules.