

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 Go to **Admin / Settings** by clicking 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.

