Add a Checklist Template

SUMMARY

Checklists are a great way to help your team keep track of tasks and required documents within a transaction. In this article, you'll learn how to create checklist templates that can later be applied to transactions.

IN THIS ARTICLE

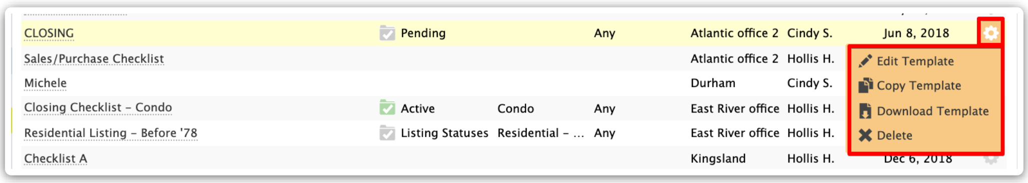
1:27

Save a Checklist Template

Once you have completed the desired fields,**click [Save Template] to save.** The template is now ready to be added to transactions.

Copy, Download, or Delete a Template

You may edit, copy, download, or delete an existing checklist template by returning to the list of checklist templates, clicking the gear, then selecting the appropriate action from the list.



Deleting a checklist template doesn't remove it from transactions where it was previously applied.