

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.

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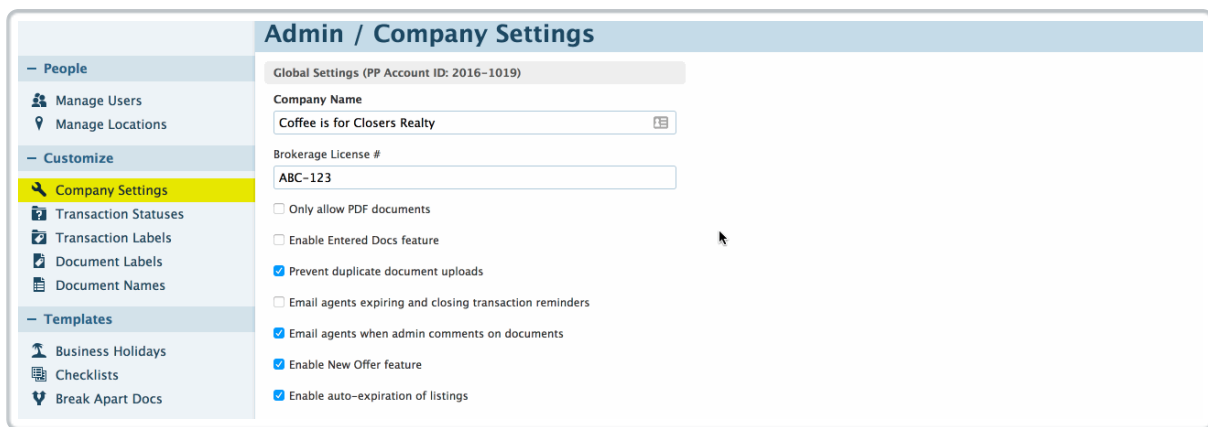
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Create a Checklist Template

To create a checklist template:

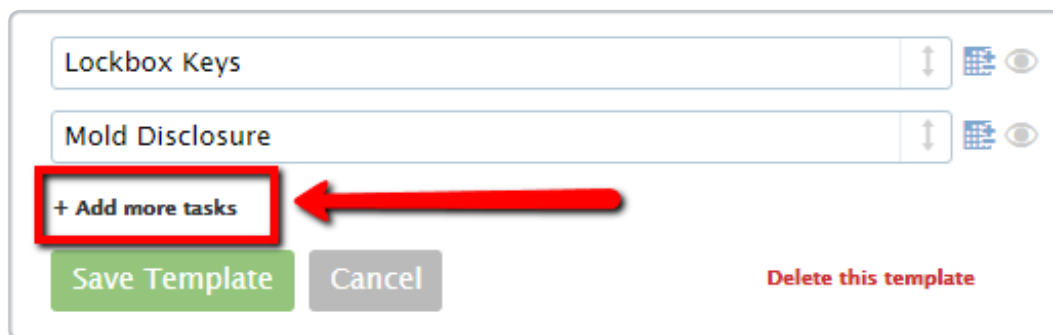
- 1 Click your name in the upper right corner then "Admin / Settings".
- 2 Select [Checklists] from the left menu.
- 3 Click [Add Template].



Enter Basic Checklist Info

To enter basic checklist information:

- 1 Select a location, give the checklist a title, then add your tasks.
- 2 You can include as many tasks as you'd like on a template.
- 3 Add more tasks by clicking [Add more Tasks].



Define Relative Due Dates

Checklist tasks can have due dates defined relative to certain trigger activities. Setting relative due dates on the template means you won't have to manually add due dates to each task on a transaction.

To add or change relative due dates:

- 1 Click the [Calendar] next to a task.

Document Names or Tasks to Track

| | | | | | | |
|------------------------------|---------------|---------------------|-------|-----------------|---------------|----------------------|
| Listing Agreement | Calendar Icon | Due 2 Business Days | after | Expiration Date | Set Date Rule | Remove due date rule |
| Seller's Property Disclosure | Calendar Icon | | | | | |
| Agency Disclosure | Calendar Icon | | | | | |
| Lead-based Paint Disclosure | Calendar Icon | | | | | |

2 Enter the appropriate values to build your rule.

3 Click [Set Date Rule]

These date rules will be resolved into actual dates when this checklist is added to a transaction or whenever the date for the defined trigger activity is updated on that transaction.

Rearrange Tasks

Rearrange tasks by hovering over the right side of a task until a hand appears then dragging it to it's desired place in the list.

Checklist Name
CLOSING

☒ Automatically apply this checklist to transactions

Based on Status: Pending
Based on Label: - select a label -

Based on Side: Any

☐ Automatically apply to transactions in all locations

Document Names or Tasks to Track

[Learn how to mention a specific agent or admin in a task](#)

| | |
|--|-------------------|
| TO AVOID A DELAY IN YOUR COMMISSION PAY OUT, PLEASE HAVE ... | Visible to Anyone |
| Input CDA | Visible to Anyone |
| Generate CDA | Visible to Anyone |
| Upload copy of Earnest \$ deposit to transaction | Visible to Anyone |
| Warranty or waiver | Visible to Anyone |
| Earnest \$ deposit | Visible to Anyone |
| Deposit \$ | Visible to Anyone |
| Inspection notice or waiver | Visible to Anyone |
| Changed status of transaction to Pending | Visible to Anyone |

Automatically Assign Checklist Templates to Transactions

Pipeline can be set to automatically assign checklists to transactions whenever the status, side, or label of a transaction changes to a desired value. Checklist auto-assignment saves time for your admins and makes your transaction management workflow more reliable.

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To follow the written steps for how to do this, see: [Automatically assign checklist templates to transactions](#) →

Specify Location

Master admins can choose to automatically apply a checklist template to all locations by checking [Automatically apply to transactions in all locations] box.

If left unchecked, the automatic assignment of the checklist will only occur when the transaction belongs to the same location as the checklist.



Only master admins have access to this option.

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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.

| | | | | | | |
|----------------------------------|--|-------------------|-------------------|-------------------|-------------|-------------------|
| CLOSING | <input checked="" type="checkbox"/> Pending | Any | Atlantic office 2 | Cindy S. | Jun 8, 2018 | |
| Sales/Purchase Checklist | | | Atlantic office 2 | Hollis H. | | Edit Template |
| Michele | | | Durham | Cindy S. | | Copy Template |
| Closing Checklist - Condo | <input checked="" type="checkbox"/> Active | Condo | Any | East River office | Hollis H. | Download Template |
| Residential Listing - Before '78 | <input checked="" type="checkbox"/> Listing Statuses | Residential - ... | Any | East River office | Hollis H. | Delete |
| Checklist A | | | Kingsland | Hollis H. | Dec 6, 2018 | |

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