

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

- Create a Checklist Template
- Enter Basic Checklist Info
- Define Due Dates
- Make Changes to Date Rules
- Rearrange Tasks
- Auto-assign Checklist Templates to Transactions
- Specify Location
- Save a Checklist Template
- Copy, Download, or Delete a Checklist Template

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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.

