Manage Checklist Templates

SUMMARY

Checklists help admins and agents stay in compliance by tracking tasks, due dates, and required documents within a transaction. This article explains how to create and manage checklists to track transaction progress.

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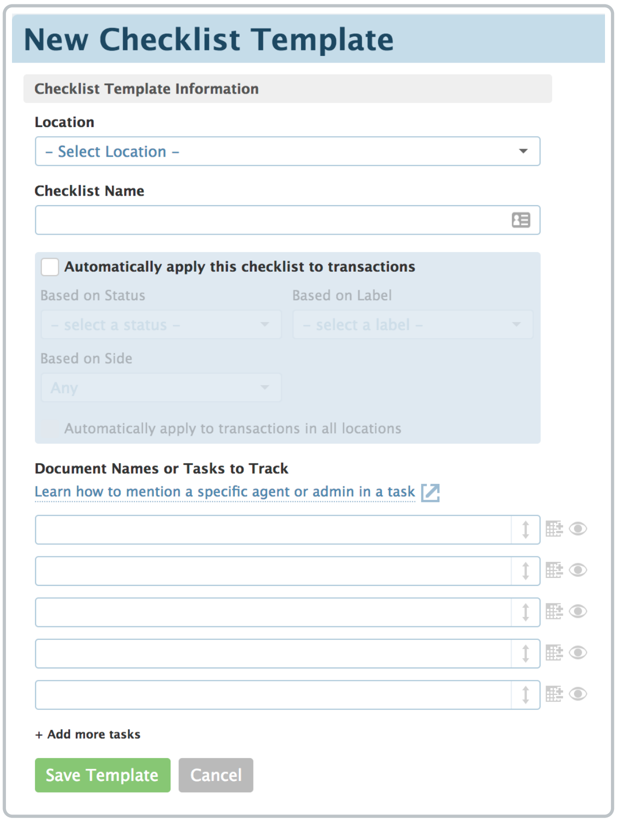
Add a Checklist Template

To add a checklist template:

1. **Click your name in the upper right corner then [Admin / Settings].**
2. **Select [Checklists] from the left menu.**
3. **Choose [Add Template].**
4. **Select a location, give the checklist a title, then add tasks.** You can include as many individual tasks as you'd like on a template and add more tasks by choosing [+ Add more tasks].
5. **Click [Save Template].**



You can add URL links to tasks. Links added to tasks are clickable and will open in a new window.

Add Relative Due Dates

Relative due dates allow you to set tasks to be due based on important dates related to a transaction. For example, you may have a task which needs to be due 5 days before closing date. For maximum time-saving, relative due dates should be defined at the checklist template level whenever possible, but they can also be changed directly on transactions. Changes made directly on transactions do not impact checklist templates.

You can define relative due dates based on these transaction dates:

- Acceptance Date
- Close Date
- Listing Date
- Transaction Creation
- Expiration Date
- Checklist Addition

Additionally, if you have any of the following optional date fields enabled, you can use them as relative due dates:

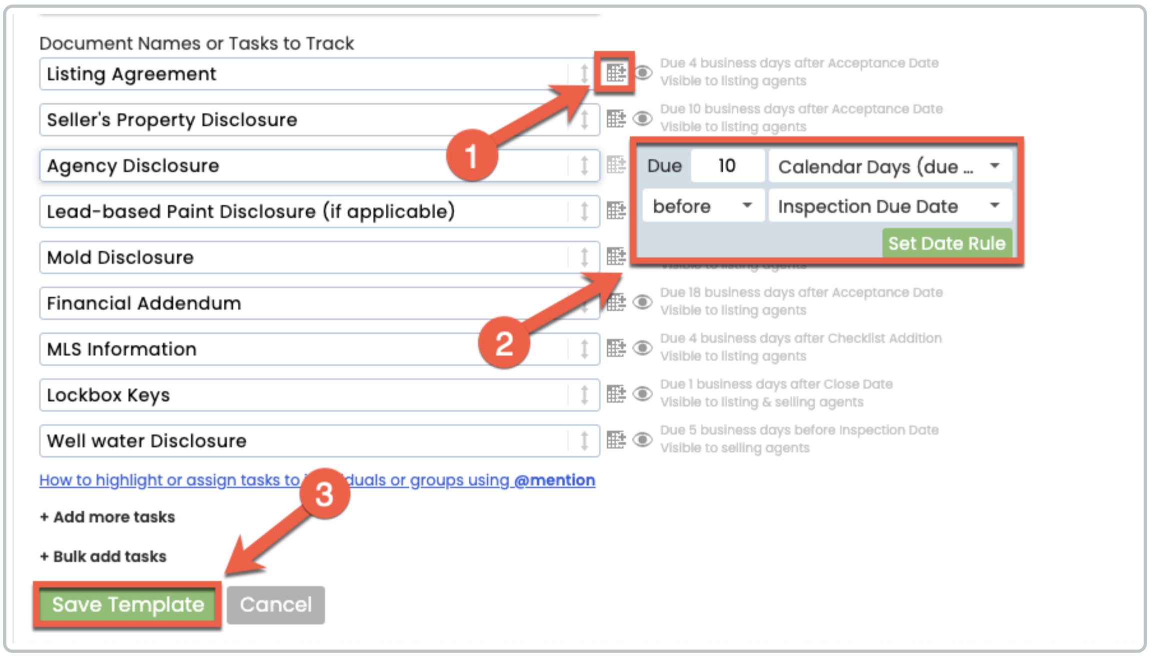
- Inspection Due Date
- Inspection Date
- Loan Approval Due Date
- Loan Approval Date
- Appraisal Due Date
- Appraisal Date
- Option Period End Date
- Earnest Money Due Date
- Earnest Money Deposit Date

To add a relative due date rule:

1. **Click the calendar icon** to the right of the task.
2. Next to *Due*, **enter the number of days** for the date rule.
3. From the days menu, **choose *Business Days*, *Calendar Days*, or *Calendar Days (due Business Days)*** to set what days should be used to calculate the number of days from the trigger date.
   • Business Days leaves out Saturdays, Sundays, and your company's Business Holidays to calculate due dates.
   • Calendar Days uses plain calendar days to calculate due dates.
   • Calendar Days (due Business Days) calculates due dates by calendar days, but bumps the due date to the next business day if it falls on Saturday, Sunday, or your company's Business Holidays.
4. **Choose *Before*, *After*, or *On*** based on when the task is due relative to the transaction date.
5. **Choose the transaction date** to base your rule on.

6 **Click [Set Date Rule].**

7 **Click [Save Template].** These date rules will be applied every time the checklist is added to a transaction in the future.



Learn how to Enable Optional Date Fields →

Edit a Checklist Template

Once you've added a template to a transaction, any edits made on that specific checklist are not applied back to the template.

To edit a checklist template:

1 **Click the gear and choose [Edit Template].**

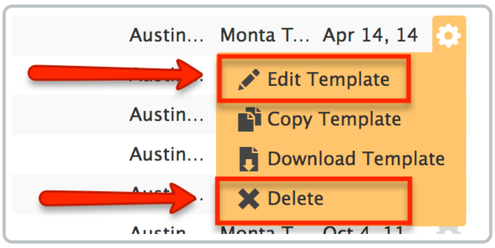
Here are a few things you can do:

- **Reorder tasks:** To reorder tasks, hover to the right of the task until a hand appears. Click, drag, and drop the task to the appropriate place on the list.
- **Change due date:** Change a task's due date by clicking the calendar icon.
- **Remove due date:** Remove a due date by clicking the calendar icon and selecting [Remove Date Rule].

Delete a Checklist Template

You can delete an unwanted checklist template by:

1. **Clicking the gear and choose "Delete".** Deleted checklist templates will not be removed from transactions.



Automatically Assign a Checklist Template to Transactions

Checklist auto-assignment saves time for your admins and makes your transaction management workflow more reliable.

For more details, check out: Automatically Assign Checklist Templates to Transactions →

Download a Checklist Template

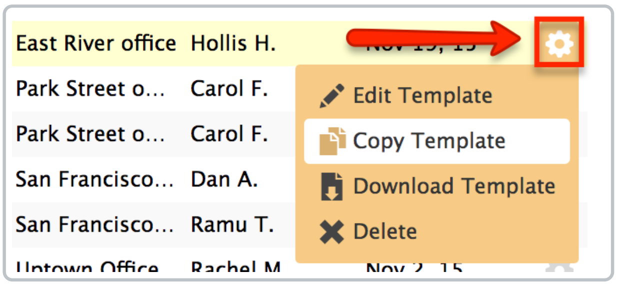
Back up your checklist templates or share them with external managers and admins.

Learn how to Download Checklist Templates as CSV Spreadsheet Files →

Copy a Checklist Template

To copy a checklist template:

1. **Click your name in the upper right corner then "Admin / Settings".**
2. **Select [Checklists]** from the left menu.
3. **Click the [Gear] and select "Copy Template".** From here, you can update or change any info as you would when creating a checklist template.



Learn more about Adding Checklist Templates →

Pipeline Pro Webinar Recording: Top 5 Checklist Tricks

Find out the top 5 checklist tricks that'll help save you and your team time and clicks.

16:54

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Pipeline Pro Webinar Recording: Tracking Key Dates and Timelines in Pipeline

This week we'll dive into how to setup, sync, and share key dates and timelines in Pipeline.

9:48

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