Order Automatically Assigned Checklists

SUMMARY

This article shows you how to control the order in which auto-assigned checklists are displayed on transactions. This can come in handy if there are several lists being auto-assigned at once.
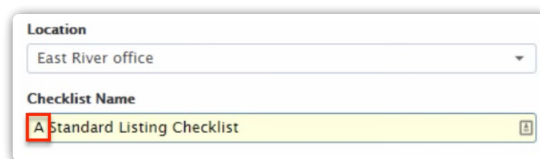
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Overview

Auto-assigned checklists are displayed in alphabetical order by default, so adding a prefix to checklist titles (e.g., 1 - 2 - 3, or A - B - C) will allow them to naturally fall in the order you specify.

Numeric values only work up to the number 9, so letters are recommended to allow for growth beyond 9 checklists.

Set Up Checklists for Auto-Assignment

To create a new checklist:

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 name of an existing template to make changes to it.

4. **When specifying the checklist's name, enter a prefix based on the order you'd like the**

checklist to appear. For example, if this is the first checklist you want to be listed on a transaction, prefix the title with the letter A - or the number 1 - . If this is the second checklist you want to be listed on a transaction, prefix the title with the letter B - or number 2 - and so on.

5. **Click "Automatically assign this checklist to transactions" and complete the section to have the checklist automatically assigned whenever the transaction's status, label, or side changes to the desired value.**

6. **Click [Save Template] to save the checklist.**

7. **Repeat the process to designate the display order of additional checklists.**

> Learn more about automatically assigning checklists: Automatically Assign Checklist Templates to Transactions →

> Learn more about creating checklists: Add a Checklist Template →

Edit a Transaction's Label to See Results

When a transaction's status or label change to match the auto assignment criteria, the checklists will appear in the order you specified.

> This feature does not work on tasks inside a checklist. Tasks already appear in the order specified on the checklist template.