

Add / Edit Checklist Templates

SUMMARY

Create checklist templates to be automatically or manually applied to transactions. Automate and designate tasks by setting visibility, automatic due dates, and key date indicators. Use **@mention** to highlight or assign tasks to individuals or groups.

Learn How To

[Manage Checklist Templates →](#)

[Set Task Visibility →](#)

[Highlight a Person's Task by @mentioning Them →](#)

[Manage Key Dates →](#)