Manage Checklist Templates

SUMMARY

Learn how to add, edit, copy, download, and delete Checklist Templates.

IN THIS ARTICLE Introduction Who Can Do This? Add a Checklist Template I **Basic Info** Locations **Checklist Name** Automatically Apply to Transactions **Based on Status Based on Side Based on Labels** In All Locations Document Names or Tasks to Track Add Tasks **Relative Due Date** Visibility Type Designate as a Key Date Allow Agents to Change Due Date **Reorder Tasks** Delete a Task Edit a Checklist Template Copy a Checklist Template Download a Checklist Template Delete a Checklist Template **RELATED PIPELINE PRO WEBINAR RECORDINGS**

Top 5 Checklist Tricks Tracking Key Dates and Timelines in Pipeline

Introduction

Checklists help admins and agents stay in compliance by tracking Tasks that need to be completed

on a transaction. Tasks are items on a Checklist that represent documents or actions that need to be uploaded or completed.

Checklist Templates are set up by an admin for use across the company's transactions. Once a Checklist Template is set up, it can be applied to transactions manually or, preferably, automatically based on rules defined by an admin.

For maximum task automation and optimization, utilize the following:

- @Mention: Highlight or assign Tasks to individuals or groups Learn more about @Mention →
- **Relative Due Dates:** Sets Task Due Dates to be automatically populated relative to other dates on the transaction.
- Task Visibility: Reduce clutter and enforce privacy by only showing tasks that are relevant to the person viewing them.
- Key Dates: Designate important timeline dates as Key Dates to sync to calendars and include on coversheets.
- Agent-editable Due Dates: Allow agents to change Due Dates of specific Tasks.

Who Can Do This?

Only master admins and admins with permission to *Fully Manage Checklists and Templates* can add, edit, and delete *Checklist Templates*.

Add a Checklist Template I

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To add a Checklist Template:

1 Go to Admin / Settings by clicking your name in the upper right corner, then [Admin / Settings].







Basic Info

Locations

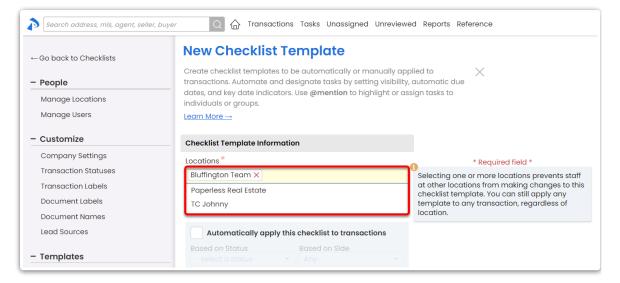
If your company has more than one Location in Pipeline, specify which locations the checklist relates to. Regardless of which *Locations* are specified, any Checklist Template can still be manually added to any transaction.

When a Checklist Template is set to be automatically applied, it will only be applied to transactions within the specified *Locations*.

Only admins of the specifiedLocations will be able to able to make changes to the template.

To set *Locations* for a Checklist Template:

1 If your company has more than one*Location* in Pipeline, **select the appropriate** *Locations* **for the Checklist**.



Checklist Name

Give the Checklist a name.



Search address, mls, agent, selle	r, buyer 🛛 🖓 Transactions Tasks Unassigned Unreviewed Reports Reference
← Go back to Checklists - People Manage Locations Manage Users	New Checklist Template 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 More →
- Customize Company Settings Transaction Statuses Transaction Labels	Checklist Template Information Locations * Bluffington Team X Paperless Real Estate X Checklist Name *
Document Labels Document Names Lead Sources	Pending Buyer Automatically apply this checklist to transactions
– Templates	Based on Status Based on Side - select a status - +

Automatically Apply to Transactions I

Pipeline can automatically add Checklists to transactions whenever a transaction's Status, Side, or Label meets the criteria you set on the template. Auto-Applying Checklists save time for your admins and makes your transaction management workflow more reliable.

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To automatically apply a Checklist Template to transactions:

1 Check the box next toAutomatically apply this checklist to transactions. This will automatically apply the *Checklist Template* to transactions in theLocations set for the template.

Search address, mis, agent, seller, buye	Q Transactions Tasks Unassigned Unreviewed
← Go back to Checklists	New Checklist Template 0
– People	Checklist Template Information
Manage Locations Manage Users	Locations* Bluffington Team × Paperless Real Estate × Checklist Name*
– Customize	Pending Buyer
Company Settings Transaction Statuses	Automatically apply this checklist to transactions
Transaction Labels	Based on Status Based on Side - select a status - -
Document Labels	Based on Label
Document Names	- select labels -
Lead Sources	Automatically apply to transactions in all locations
– Templates	Document Names or Tasks to Track 🕦
Business Holidays	ी © o ⁴ ∩

2 Set your desired rules (described below).

Pipeline Pro Tip: To ensure the most relevant tasks are auto-applied to transactions, useStatus, Label and Side together. For example, a Checklist for docs required when your office represents the buyer on commercial transactions under contract may be automatically applied to Pending Status / Commercial Label / Buying Side transactions.

Transaction Status or Label is required when using Auto-Applying Checklists.

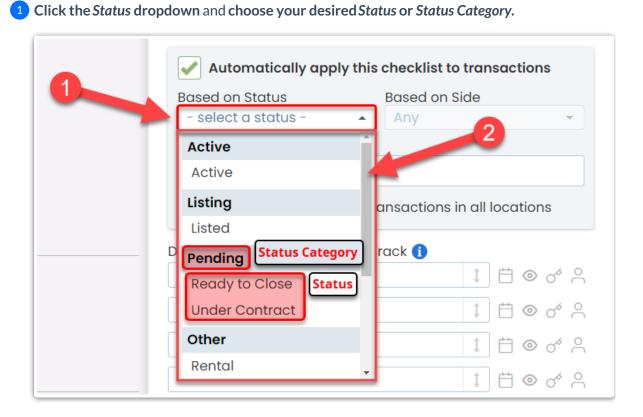
Based on Status

Optionally, set the *Checklist* to automatically apply to transactions when they are moved to a particular *Status*.

For example, a checklist for docs required when an offer is accepted, may be auto-applied to *Pending Status* transactions.

Learn more about Transaction Statuses →

To automatically apply a Checklist to transactions based on Status:



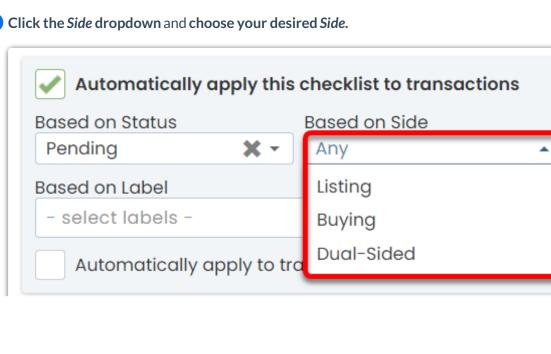
Based on Side

Optionally, set the Checklist to automatically apply to transactions where your office represents a particular Side. By default, the template will apply whenever your office represents any Side.

For example, a Checklist for docs required when your office represents the Listing Side, may be auto-applied to Listing Side transactions.

Learn more about Auto-detected Transaction Sides →

To automatically apply a Checklist to transactions based on Side:



1 Click the Side dropdown and choose your desired Side.

Side	Rule
Any	Applies to transactions regardless of their side, when your office represents either the buyer and / or seller.
Listing	Applies to transactions where your office represents the seller (an in-house Listing Agent is added).
Buying	Applies to transactions where you represent the buyer (an in-house Selling Agent is added).
Dual-Sided	Applies to transactions where your office represents both the seller and buyer (both an in-house Listing and in-house Selling Agent added).

Use Dual-Sided for Tasks that are only needed on Dual-Sided transactions. Do not include *Listing or Buying Side* Tasks in a template set to auto-apply when Dual-Sided.

Based on Labels

You can optionally set Checklists to automatically apply to transactions with particular*Transaction Labels*.

For example, if both commercial and residential transactions require the same checklist of tasks, specify both *Commercial* and *Residential* in the label section to allow the checklist to be applied in either case.

Learn more about Transaction Labels →

To automatically apply a Checklist to transactions based on Label:

1 Click the Label dropdown and choose your desired Label.

Automatically	apply this	checklist to trans	actions
Based on Status		Based on Side	
Pending	X -	Buying	× -
Based on Label			
Condo			
Land and Lot			
New Build			
Residential			

In All Locations

Optionally, set the Checklist to automatically apply to transactions in all*Locations* in your Pipeline account.

By default, if you've chosen to automatically apply a checklist to transactions, the *Checklist Template* will only apply to transactions in Locations set for the template.

To automatically apply a *Checklist Template* on transactions in all*Locations*:

1 Check the box next toAutomatically apply to transactions in all locations.

Search address, mls, agent, seller, buye	er Q 🟠 Transactions Tasks Unassigned Unreviewed
← Go back to Checklists	Edit Pending - Required Docs 0
– People	Checklist Template Information
Manage Locations Manage Users	Location* Paperless Real Estate
– Customize	Checklist Name * Pending - Required Docs
Company Settings Transaction Statuses Transaction Labels	Automatically apply this checklist to transactions Based on Status Based on Label Pending
Document Labels	Based on Side Any
Lead Sources	Automatically apply to transactions in all locations
– Templates	Document Names or Tasks to Track 1
Business Holidays	Ì ≞ ⊘ ♂ ∧

On master admins in your Pipeline account have this option.

Document Names or Tasks to Track

Add Tasks

To add a Task:

1 Enter the Task into the list of Document Names or Tasks to Track.

• To add more tasks, click [+ Add more tasks].

• To add a list of tasks in bulk, click [+Bulk add tasks] then paste or type your list and [Add Tasks].

2 Optimize your tasks (described below).

Search address, mls, agent, seller, buye	er Q A Transactions Tasks Unassigned Unreviewed
← Go back to Checklists	New Checklist Template 0
- People	Checklist Template Information
Manage Locations Manage Users	Location* - Select Location -
– Customize	Checklist Name *
Company Settings Transaction Statuses	Automatically apply this checklist to transactions
Transaction Labels	Based on Status Based on Label
Document Labels	Based on Side
Document Names	Any •
Lead Sources	Automatically apply to transactions in all locations
– Templates	Document Names or Tasks to Track ()
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Checklists	L I I I I I I I I I I I I I I I I I
Break Apart Docs	ी © of A
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Agent Fees	ी ि ⊘ र ∩
Client Fees	+ Add more tasks
Deductions	+ Bulk add tasks
Commission Basis	Save Template Cancel

Add URL links to a task by entering the complete URL into a task. Links added to Tasks are clickable and will open in a new window.

 \underline{U} \underline{e}° $\underline{\Theta}^{\circ}$ Mention to highlight or assign Tasks to individuals or groups. Learn more about $\underline{\Theta}^{\circ}$ $\underline{\Theta}^{\circ}$

Set a Relative Due Date

Relative Due Dates allow you to set Tasks to be due based on important dates related to a transaction. For example, a task may need to be due 5 days before the transaction's Close Date. For maximum time-saving, Relative Due Dates should be defined on the Checklist Template whenever possible, but they can also be changed directly on transactions. Changes made directly on transactions do not impact checklist templates.

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 \rightarrow , 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 set a Relative Due Date for a task:

1 Next to a Task, **click [the calendar icon]**.

2 Next to Due, enter the number of days for the date rule.

From the days menu, choose what days should be used to calculate the number of days from the trigger date.

Days	Calculation
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].

Search address, mls, agent, seller, bu	yer 🖸 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference
← Go back to Checklists	Edit Pending - Required Docs 0
- People	Checklist Template Information
•	Location*
Manage Locations	Paperless Real Estate 👻
Manage Users	Checklist Name*
- Customize	Pending - Required Docs
Company Settings Transaction Statuses	Automatically apply this checklist to transactions Based on Status Based on Label
Transaction Labels	Pending 🗱 🔻 – select a label – 👻
Document Labels	Based on Side
Document Names	Any 👻
Lead Sources	Automatically apply to transactions in all locations
- Templates	Document Names or Tasks to Track
Business Holidays	Buyer Preapproval
Checklists	Home inspection signoff
Break Apart Docs	Change status to pending in MLS (if our 1)
– Financials	Seller's disclosure signed by buyer & se_ 1 🗎 🕲 🔗 🖉 Visible to listing & selling agents
Agent Fees	Lead Based Paint signed by buyer & sel.
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- 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].

Set a Visibility Type

Admins can control the Visibility of each Task on Checklist Templates. This adds an extra layer of privacy, organizes tasks more effectively, and eliminates involvement of users not responsible for tasks.

Learn more about Task Visibility →

To set a Task's Visibility Type:

1 Click [the eye icon].

2 Select the desired *Visibility Type* and click [Set Task Visibility].

Home inspection signoff	Buyer Preapproval	1	of O Visible to listing & selling	g agent
Change status to pending in MLS (if our ↓ Image: Change status to pending in MLS (if our ↓ Image: Change status to pending in MLS (if our ↓ Image: Change status to pending in MLS (if our ↓ Anyone ✓ Seller's disclosure signed by buyer & sel ↓ Image: Change status to pending in MLS (if our ↓ Image: Change status to pending in MLS (if our ↓ Anyone ✓ Lead Based Paint signed by buyer & sel ↓ Image: Change status to pending in MLS (if our ↓ Image	Home inspection signoff	H 💿	Set task visibility:	
Seller's disclosure signed by buyer & se ↓ Image: Comparison of closing addendum (if appl ↓ Image: Com	Change status to pending in MLS (if our		Anyone	•
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	Commission disbursement authorizatio 1		@mention	

 \underline{W} hat does each Visibility Type mean? Learn about each Task Visibility Type here \rightarrow

Designate a Task as a Key Date

Use Key Dates to designate tasks in yourChecklist Templates as important timeline dates that can be displayed on your transaction coversheets, synced to your calendar app, and autofilled into emails and message templates.

Learn more about Key Dates →

To designate a task as a Key Date:

1 Click [the key icon]next to the task. Once the Key Date is enabled, the task's key will turn blue.

Document Names or Tasks to Track 🚺					
Buyer Preapproval		Ë	© 0°	\sim	v
Home inspection signoff	1		ی ک	<u> </u>	
Change status to pending in MLS (if our	. 1		ۍ 💿	8	D V

Allow Agents to Change a Task's Due Date

You can optionally allow agents to add or change the Due Date of specific tasks once the tasks are added to transactions.

To set a task's Due Date as editable by agents (once it has been added to transactions):

1 Click [the person icon] next to the task.

Document Names or Tasks to Track 🚺	
Buyer Preapproval	1 🗢 💿 of A
Home inspection signoff	1 🗄 🐷 🔗 😤
Change status to pending in MLS (if our.	t 🗂 💿 🕫 🕱

Reorder Tasks

Drag and drop to reorder Tasks in a Checklist Template.

When a template is added to a transaction, tasks will display in the order you set on the Checklist Template. Individuals can opt to sort their tasks by Due Date.

Learn how to Sort Tasks by Due Date \rightarrow

To reorder tasks on a template:

1 **Click** [\$] to the right of the task you want to move.

2 Drag and drop the task to the appropriate place on the list.

Lead Sources	Automatically apply this checklist to transactions	
	Based on Status Based on Label	
– Templates	Pending 🗱 🔻 🛛 - select a label - 🔻	
Business Holidays	Based on Side	
Checklists	Any	
Break Apart Docs	Automatically apply to transactions in all locations	
– Financials	Document Names or Tasks to Track 1	
Agent Fees	Change status to pending in MLS (if our 1) 📋 💿 🔗 Due on Acceptance Date Visible to admins	
Client Fees	Counter offer	
Deductions	Executed purchase contract	
Commission Basis	Seller's disclosure signed by buyer & se 1 🗎 💿 of 🙁 Visible to listing & selling agents	
+ Backups	Dual agency addendum (if applicable)	
	Home inspection signoff	
- Billing	Repair addendum (if applicable) I	
Upgrade / Downgrade	Extension of closing addendum (if appl 1)	
Update Credit Card Billing History	Commission disbursement authorizatio	
	Buyer Preapproval 1 🛱 💿 🛷 🔗 Visible to listing & selling agents	
+ Add-On Modules	Cooperating broker's commission agre_	
+ Integrations	Lead Based Paint signed by buyer & sel.	
	+ Add more tasks	
Current Plan	+ Bulk add tasks	

Delete a Task

To delete a task on a Checklist Template:

1 Delete the text in the Task. When you save the template, the task will be deleted.

Search address, mls, agent, seller, buy	er C & Transactions Tasks Unassigned Unreviewed Reports Reference -	Add Transact
Transaction Statuses	Paperless Real Estate	
Transaction Labels	Checklist Name *	
Document Labels	Pending - Required Docs	
Document Names		
Lead Sources	Automatically apply this checklist to transactions	
– Templates	Based on Status Based on Label Pending X - select a label - -	
Business Holidays	Based on Side	
Checklists	Any	
Break Apart Docs	Automatically apply to transactions in all locations	
- Financials	Document Names or Tasks to Track ()	
	Buyer Preapproval	
Agent Fees Client Fees	Home inspection signoff	
Deductions	Counter offer	
Commission Basis	Change status to pending in MLS (if our_ 1 📋 🞯 of 🔗 Due on Acceptance D	
+ Backups	Seller's disclosure signed by buyer & se 1	
	Dual agency addendum (if applicable)	
– Billing	Lead Based Paint signed by buyer & sel 1 📋 💿 🔗 Visible to listing & selling agents	
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+ Add-On Modules	Cooperating broker's commission agre 1 📋 💿 of 🔗 Visible to admins	
+ Integrations	Executed purchase contract	

Edit a Checklist Template

To edit a Checklist Template:

1 Go to Admin / Settings by clicking your name in the upper right corner, then [Admin / Settings].

2 Select [Checklists] from the left menu.

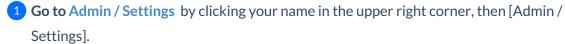
3 To the right of the template you want to edit, click the gear and select [Edit Template].

4 Edit any desired fields (as described above).

Any edits made on Checklist Templates will only affect transactions where the Checklist is ap ded in the future. Edits made will not affect transactions where that specific Checklist has already been added or automatically applied.

Copy a Checklist Template

To copy a Checklist Template:





2 Select [Checklists] from the left menu.



3 To the right of the template you want to copy, click [] and select [Copy Template].

Learn more about Adding Checklist Templates →

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 →

To download a Checklist Template:

1 Go to Admin / Settings by clicking your name in the upper right corner, then [Admin / Settings].



2 Select [Checklists] from the left menu.

3 To the right of the template you want to download, select [Download Template].

4 Save the template to your computer. The selected checklist template will be downloaded and saved to your computer.

Add Checklist Template							
Checklist	Auto Status	Auto Label	Auto Side	Location	Added By	Added On	
Admin Closing Checklist				Paperless R	Hollis H.	May 7, 2022	ŝ
HR Checklist				Paperless R	Hollis H.	May 7, 2022	
Listing	🖸 Listed		Any	Paperless R	Hollis H.	May 7, 2022	202
Listing Residential	🖸 Listed	Residential	Any	Paperless R	Hollis H.	Oct 5, 2021	ŝ
Listing Side	Listed Listing		Listing	Paperless R	Hollis 🗹 Ec	lit Template	
Pending - Required Docs	Pending Any		Any	Paperless R			
Pre-Listing	Active Statu Any		Any	Paperless R	Mollis		
Release Checklist				Paperless R	Hollis	elete	-0
Seller Closing	Closed		Listing	Paperless R	Hollis H	Oct 5, 2021	

Delete a Checklist Template

To delete an unwanted Checklist Template:

1 Go to Admin / Settings by clicking your name in the upper right corner, then [Admin / Settings].

2 Select [Checklists] from the left menu.



3 To the right of the template you want to delete, **click** [�] and **select [Delete].**

4 Click [delete] again to confirm deletion.

T Andre Obenetidiet Temperaturte							
Add Checklist Template							
Checklist	Auto Status	Auto Label	Auto Side	Location	Added By	Added On	
Admin Closing Checklist				Paperless R	Hollis H.	May 7, 2022	ξĝ
HR Checklist				Paperless R	Hollis H.	May 7, 2022	
Listing	🖸 Listed		Any	Paperless R	Hollis H.	May 7, 2022	50
Listing Residential	🖸 Listed	Residential	Any	Paperless R	Hollis H.	Oct 5, 2021	5
Listing Side	🖸 Listed		Listing	Paperless R	Hollis 🗹 Ed	lit Template	
Pending - Required Docs	Pending Any		Any	Paperless R		opy Template	
Pre-Listing	C Active Statu Any		Any	Paperless R			ate
Release Checklist				Paperless R	Hollis	elete	-1
Seller Closing	Closed		Listing	Paperless R	Hollis H	Oct 5, 2021	

Deleted Checklist Templates will not be removed from transactions where they have already been added.

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.

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View more Paperless Pipeline Pro Webinars here →