

# Combine Duplicate Checklists into a Single Checklist with Multiple Locations or Labels

## SUMMARY

Learn how to combine multiple identical *Checklist Templates* related to individual *Locations* or *Labels* into a single *Checklist Template* related to multiple *Locations* or *Labels*.

## Introduction

You can now relate a single checklist to **multiple** *Locations* and **multiple** *Labels* instead of relating a checklist to either **one** or **all** *Locations* and *Transaction Labels*. This eliminates the need to create separate checklists to represent each different location/label. This new option:

- Allows you to set a single checklist to be automatically added to transactions in multiple *Locations* that have one of multiple *Labels*
- Allows you to give checklist-related permissions to a single checklist for admins in different *Locations*
- Helps organize and streamline your checklist setup since you no longer need multiple checklists to represent multiple *Locations* and *Labels*.

If you previously created multiple checklists to represent multiple *Locations* or multiple *Labels*, follow the steps in this article to combine them into a single checklist.

## Steps to Combine Checklists

To combine multiple *Checklist Templates* into a single checklist:

- 1 Choose one *Checklist Template* to become your new single *Checklist Template* by editing or copying an existing *Checklist Template*, or adding a brand new one. [Learn more below.](#)
- 2 Update the *Locations* or *Labels* set for the *Checklist Template*. [Learn more below.](#)
- 3 Once you've combined the *Checklist Template* into a single checklist, delete any additional, unneeded, duplicate *Checklist Templates* you'd previously set up for each *Location* and / or *Label*. [Learn more below.](#)
- 4 Repeat these steps for each checklist you need to consolidate.

## Choose a Checklist Template

Choose one *Checklist Template* to become your new single *Checklist Template* by editing or copying an existing *Checklist Template*, or adding a brand new one. Choose the method below that best fits your needs:

#### Option 1: EDIT an existing checklist template to use

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Pick your cleanest, most comprehensive *Checklist Template* to start from, and edit it.

To edit a *Checklist Template*:

- 1 Click 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 **Checklist Name** and select [Edit Template].

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

#### Option 2: COPY an existing checklist template to use

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Pick your cleanest, most comprehensive *Checklist Template* to start from, copy it, and update the copy.

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

#### Option 3: ADD a new checklist template to use

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Start fresh with a brand-new *Checklist Template* to be used across multiple *Locations* and / or *Labels*.

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 Click [Add Template].

## Update Locations or Labels

Update the *Locations* or *Labels* set for the *Checklist Template*.

### Set Locations

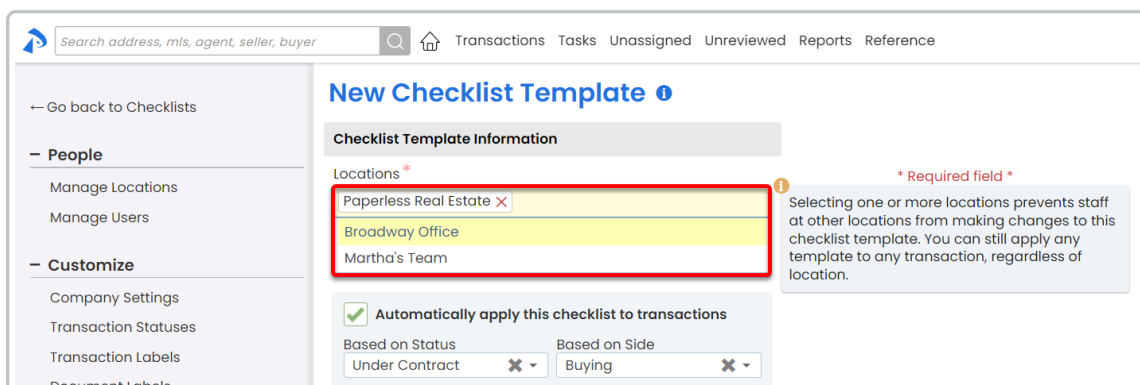
If your company has more than one *Location* in Pipeline, specify which *Locations* the *Checklist* relates to. Regardless of which *Locations* are specified, any *Checklist Template* can still be manually added to any transaction.

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 specified *Locations* will be 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.



The screenshot shows the 'New Checklist Template' form. The 'Locations' field is a required field, indicated by an asterisk. A dropdown menu is open, showing three options: 'Paperless Real Estate', 'Broadway Office', and 'Martha's Team'. A red box highlights the dropdown menu. A tooltip on the right explains that selecting one or more locations prevents staff at other locations from making changes to the checklist template. Below the 'Locations' field, there is a checkbox for 'Automatically apply this checklist to transactions' which is checked. There are also two dropdown menus for 'Based on Status' (set to 'Under Contract') and 'Based on Side' (set to 'Buying').

### Set 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*.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

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### New Checklist Template

**Checklist Template Information**

Locations\*  
Paperless Real Estate X

Checklist Name\*

Automatically apply this checklist to transactions

Based on Status: Under Contract X

Based on Side: Buying X

Based on Label

- Residential X
- Commercial X
- Condo
- Land and Lot
- New Build

## Delete Any Extra Checklist Templates

Once you've combined the *Checklist Template* into a single checklist, delete any additional *Checklist Templates* you'd previously set up for each *Location* and / or *Label*.

To delete an unwanted *Checklist Template*:

- 1 Click 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.

**Checklist Templates**

+ 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	⚙️
HR Checklist				Paperless R...	Hollis H.	May 7, 2022	⚙️
Listing	<input checked="" type="checkbox"/> Listed		Any	Paperless R...	Hollis H.	May 7, 2022	⚙️
Listing Residential	<input checked="" type="checkbox"/> Listed	Residential	Any	Paperless R...	Hollis H.	Oct 5, 2021	⚙️
Listing Side	<input checked="" type="checkbox"/> Listed		Listing	Paperless R...	Hollis H.		⚙️
Pending - Required Docs	<input checked="" type="checkbox"/> Pending		Any	Paperless R...	Hollis H.		⚙️
Pre-Listing	<input checked="" type="checkbox"/> Active Statu...		Any	Paperless R...	Hollis H.		⚙️
Release Checklist				Paperless R...	Hollis H.		⚙️
Seller Closing	<input checked="" type="checkbox"/> Closed		Listing	Paperless R...	Hollis H.	Oct 5, 2021	⚙️

⚙️ Edit Template  
⚙️ Copy Template  
⚙️ Download Template  
⚙️ Delete



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

