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

SUMMARY

Learn how to combine multiple identical *Checklists 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

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

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 *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

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

To copy 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 copy, **click [⚙]** and **select [Copy Template].**

Option 3: ADD a new checklist template to use

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

To add 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 **Click [Add Template].**

Update Locations or Labels

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

Set Locations

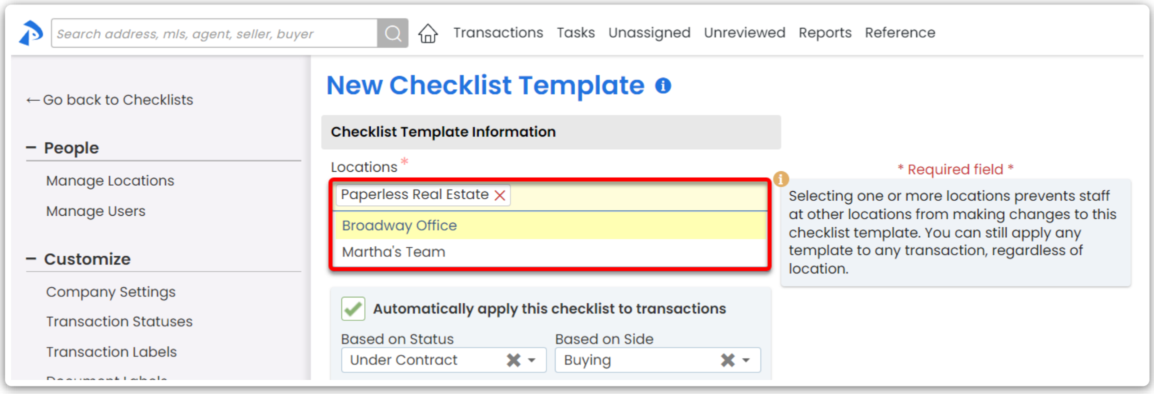
If your company has more than one *Location* in Pipeline, specify which *Locations* the *Checklist* relates to. Regardless of which *Locations* are specified, any *Checklist Template* can still be manually added to any transaction.

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 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.**



Set Labels

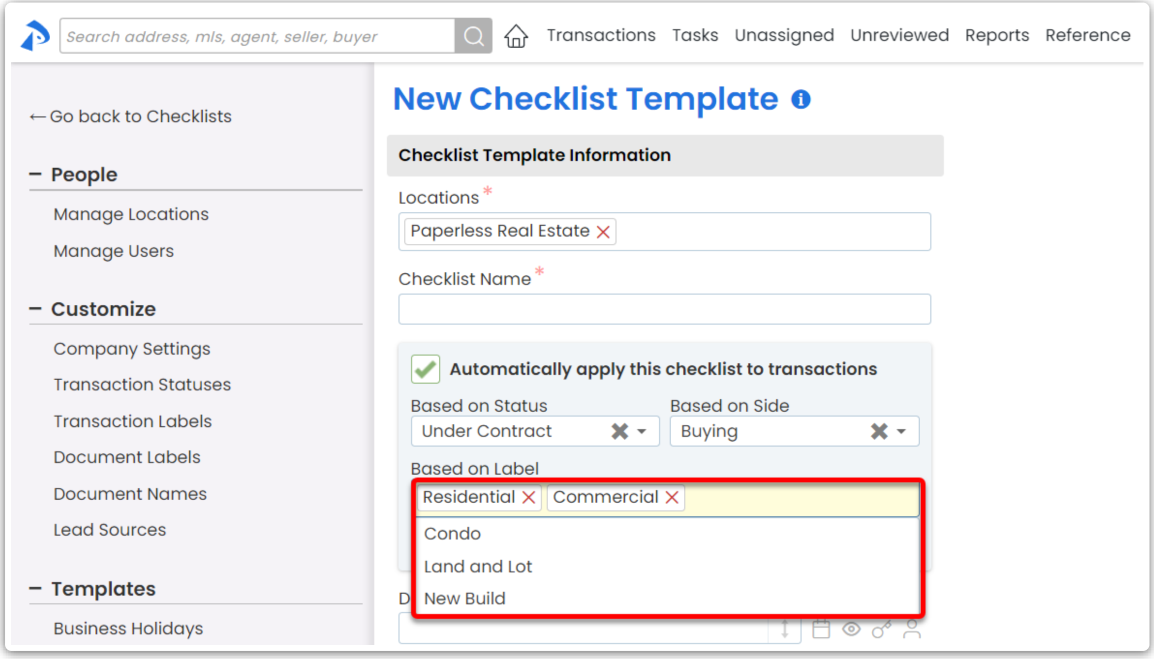
You can optionally set checklists to automatically apply to transactions with particular *Transaction Labels*.

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*.**

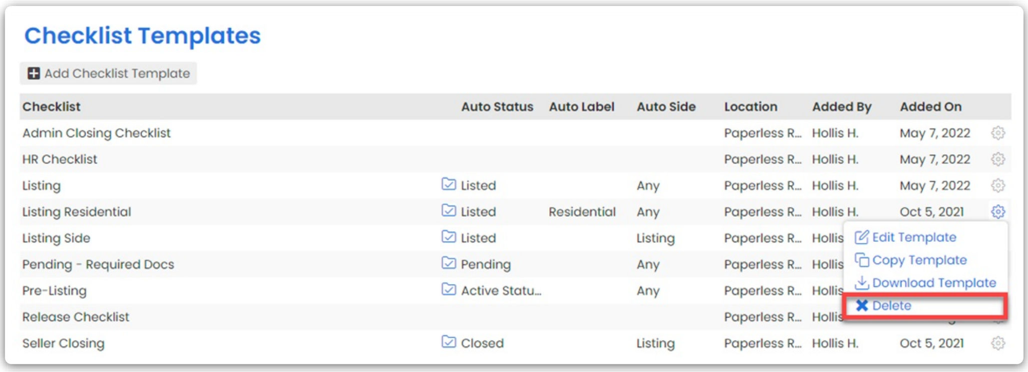


Delete Any Extra Checklist Templates

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. **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.**



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