

# 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 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

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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 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

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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 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 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 highlighted with a red box, and a tooltip explains that selecting one or more locations prevents staff at other locations from making changes to the template. The form also includes a checked checkbox for 'Automatically apply this checklist to transactions' and two dropdown menus for 'Based on Status' (Under Contract) and 'Based on Side' (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

### 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 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.

### 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                 | ☑️ Listed          |             | Any       | Paperless R... | Hollis H. | May 7, 2022 | ⚙️ |
| Listing Residential     | ☑️ Listed          | Residential | Any       | Paperless R... | Hollis H. | Oct 5, 2021 | ⚙️ |
| Listing Side            | ☑️ Listed          |             | Listing   | Paperless R... | Hollis H. |             | ⚙️ |
| Pending - Required Docs | ☑️ Pending         |             | Any       | Paperless R... | Hollis H. |             | ⚙️ |
| Pre-Listing             | ☑️ Active Statu... |             | Any       | Paperless R... | Hollis H. |             | ⚙️ |
| Release Checklist       |                    |             |           | Paperless R... | Hollis H. |             | ⚙️ |
| 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.