Pin A Checklist On A Transaction

Pin a checkliston a transaction to the top the Checklists area. By default, checklists appear in the order they're added with the most recent at the top. A pinned checklist will remain at the top even once new checklists are added.

Who Can Do This? Checklists can be pinned by admins with permission to Fully manage checklists and templates.

To pin a checklist:



1 Go to a transaction.

2 Hover over the name of the checklist you want to pin.

Search address, mis, agent, seller, buyer	🖸 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help 🛞	Robert Z.
View Transaction Edit Transaction Upload Docs Assign Docs	18 Park Street, Phoenix, AZ 85001 (sample) Added on Nov 13, 2022 by Robert Zimmerman Last updoted Oct 18, 2023 by Robert Zimmerman Email docs and notes to this transaction: <u>456/249-IIII/28-TX-</u> 2337@docs.paperfesspipeline.com	
New Offer Transaction History Deleted Docs Received Emails (0) Download Transaction	General Listed On: Nov 13, 2022 Cow Lisbel: Single ramly Residential Accepted On: Jan 9, 2023 Side: Listing Closed On: Feb 11, 2023	irsheet
Checklists : + 23% ✓ Milestones ☆ ☆ ☆ ☆ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★	Seller: Omni Homes (602) 555-0137 Buyer: Jennifer and Michael Matthews (602) 555-0136 Sale & Commission Commission Commission Summary: 3% lating / 3% buying	
Appraisal 11/3 Review Financing Closing Add doc name or task	More Info Admin Info (only visible to admin statt) - Lackbox #1910 - Seller's prefer showings on Tuesday, Wednesdays, and Thursdays anytime between 9am and 5pm. Comer of this page.	ion, click
 Sample pending checklist 	Listing Agents 💿	
Sellers Property Disclosure signed by	Tammy Sheldon (sample user) 🖂 tammy <u>367@example.com</u> [] (602) 555-0134	
Dual agency addendum (if applicable)	Jonathan Carey (sample user) 🖂 jonathan.367@example.com 📋 (602) 555-0135	

3 Click [the pin icon] that appears when you hover over the checklist's name. The pinned checklist will remain at the top of the transaction's Checklists area.

