Pin A Checklist On A Transaction

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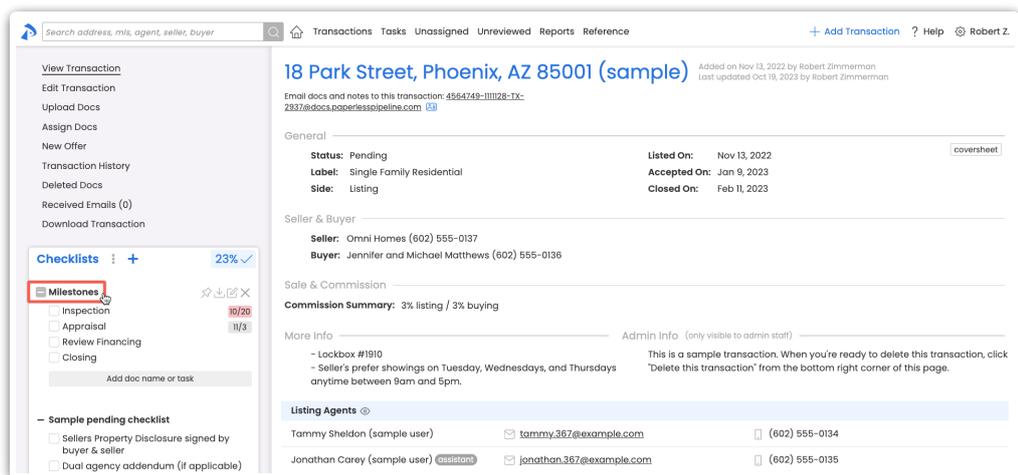
3. **Click [the pin icon] that appears when you hover over the checklist's name.** The pinned checklist will remain at the top of the transaction's *Checklists* area.

Checklists ⋮ +   23% ✓

⊟ **Milestones**   📌 ⤓ ✎ ✕
☐ Inspection   `10/20`
☐ Appraisal   `11/3`
☐ Review Financing
☐ Closing

Add doc name or task

— **Sample pending checklist**
☐ Sellers Property Disclosure signed by buyer & seller
☐ Dual agency addendum (if applicable)
☐ Home inspection signoff
☐ Repair addendum (if applicable)

Seller: Omni Homes (802) 000-0101
Buyer: Jennifer and Michael Matthe

Sale & Commission ───────────
Commission Summary: 3% listing / 3% bu

More Info ──────────────────
- Lockbox #1910
- Seller's prefer showings on Tuesda anytime between 9am and 5pm.

Listing Agents 👁

Tammy Sheldon (sample user)

Jonathan Carey (sample user) `assistant`

— 2 Contacts 👁