

Automatic Checklist Application

Automatically apply Checklist Templates to transactions based on Status or Label. specific criteria set by an admin. This streamlines the transaction management process and delivers hands-off consistency on transactions.

Apply checklists automatically based on Status or Label. You can further customize rules based on Location or Side.

Introduction

Automatic Checklist Application saves your team time and boosts the reliability and consistency of your transaction management. By automatically applying checklists to transactions based on rules set by admins, it streamlines processes and improves team coordination.

Admins can customize these rules based on a transaction's Location, Status, Side, and Label, ensuring the right tasks are automatically applied at the right time. This reduces the risk of human error and ensures all steps are completed for a successful transaction.

With automated checklists, your team can focus on more critical tasks, leading to increased efficiency and better overall performance.

How It Works

Admin Setup

Admins automatically apply relevant checklists to transactions by setting up rules. These rules determine what criteria should be met on a transaction in order to automatically apply a checklist, ensuring the right tasks are assigned to the right transactions.

Custom Rules

You can create custom rules for automatically applying checklists to transactions based on:

- **Location:** Checklists can automatically apply to specific Locations within your account. Alternatively, you can choose the "Apply to All" option to ensure the checklist is applied across all locations.
- **Status:** Checklists can automatically apply depending on the Transaction Status. For example, when a transaction reaches the *Under Contract* status, a specific checklist is added to cover all necessary tasks.
- **Side:** Checklists can automatically apply depending on the Side your office represents. For example, the buyer's side may have tasks related to inspections, while the seller's side may focus on disclosures. The system applies the correct checklist based on which side you're handling.
- **Label:** Transaction Labels allow further customization. For example, a checklist with additional steps for "Commercial" properties can be automatically applied to transactions with the "Commerical" label.

Combining Rules

You can combine different rules to create a customized workflow that fits each transaction's needs.

- **Status + Side:** Combine these to apply specific checklists for buyers or sellers when a transaction reaches a certain status. For example, when a transaction is "Under Contract," the buyer might need inspection tasks, while the seller needs disclosure tasks.
- **Status + Label:** Combine these to apply checklists based on a transaction's status and property type. For instance, when a transaction is "Closed" and labeled as "Residential," you can trigger post-closing tasks.
- **Side + Label:** Combine these for specialized deals. For example, for a buyer-side transaction labeled as "Investment," the checklist can include financial due diligence and property analysis tasks.
- **Status + Side + Label + Location:** For the most tailored workflow, combine status, side, label, and location. For example, for a "Commercial" property "Under Contract" on the buyer's side in a specific location, the system can apply a checklist that includes inspections and specialized communications.

Benefits

Automatic Checklist Application offers several key benefits, including:

- **Saves Time:** Eliminates manual task assignments, streamlining the transaction process.
- **Ensures Consistency and Compliance:** Adheres to predefined rules, maintaining high standards of accuracy across transactions.
- **Reduces Human Error:** Automatically assigns the correct tasks, ensuring all necessary steps are followed.
- **Enhances Team Coordination:** Provides a clear, structured approach to task management, keeping teams aligned and on track.

Example

- When an offer is accepted, a checklist for the required documents can be automatically applied to Pending Status transactions.
- A checklist for documents required when your office represents the Listing Side can be automatically applied to Listing Side transactions.
- 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.
- A checklist for documents required when your office represents the buyer on commercial transactions under contract may be automatically applied to Pending Status / Commercial Label / Buying Side transactions.

Best Practices

To ensure the most relevant tasks are automatically applied to transactions, use Status, Label, and Side together.

Automatically Apply a Checklist to Transactions

Automatically apply a checklist to transactions based on specific criteria such as Status, Side, or Label.

Who Can Do This: Admins with permission to *Fully manage checklists and templates*.

To automatically apply a Checklist Template to transactions:

Go to Checklist Templates :

- Click your name in the upper right corner, then [Admin / Settings].
- Select [Checklists] from the *Templates* section of the left menu.

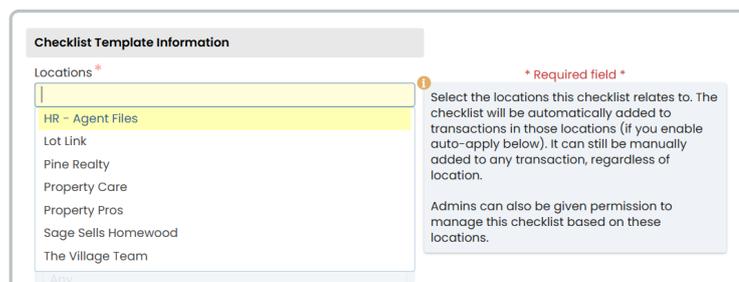
Open Template:

- Either add a new Checklist Template or edit an existing one.

[Learn how to Add & Edit Checklist Templates →](#)

Set Locations:

- If your office has one Location, the checklist will apply to all transactions.
- If your office has multiple, select the locations whose transactions this checklist should be automatically applied to.
 - This also allows admins in the selected location to edit and manage the template.



The screenshot shows a form titled "Checklist Template Information". It features a "Locations" field with a red asterisk indicating it is a required field. A dropdown menu is open, showing a list of locations: "HR - Agent Files", "Lot Link", "Pine Realty", "Property Care", "Property Pros", "Sage Sells Homewood", and "The Village Team". To the right of the dropdown, there is an information icon (i) and a text box explaining that the selected locations will be automatically added to transactions and that admins can be given permission to manage the checklist based on these locations.

Checklist Template Information

Locations * * Required field *

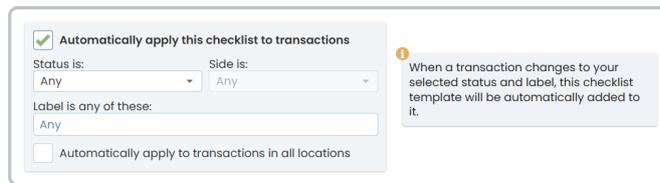
HR - Agent Files
Lot Link
Pine Realty
Property Care
Property Pros
Sage Sells Homewood
The Village Team

Select the locations this checklist relates to. The checklist will be automatically added to transactions in these locations (if you enable auto-apply below). It can still be manually added to any transaction, regardless of location.

Admins can also be given permission to manage this checklist based on these locations.

Automatically Apply Checklist:

- Check the box next to "Automatically apply this checklist to transactions."

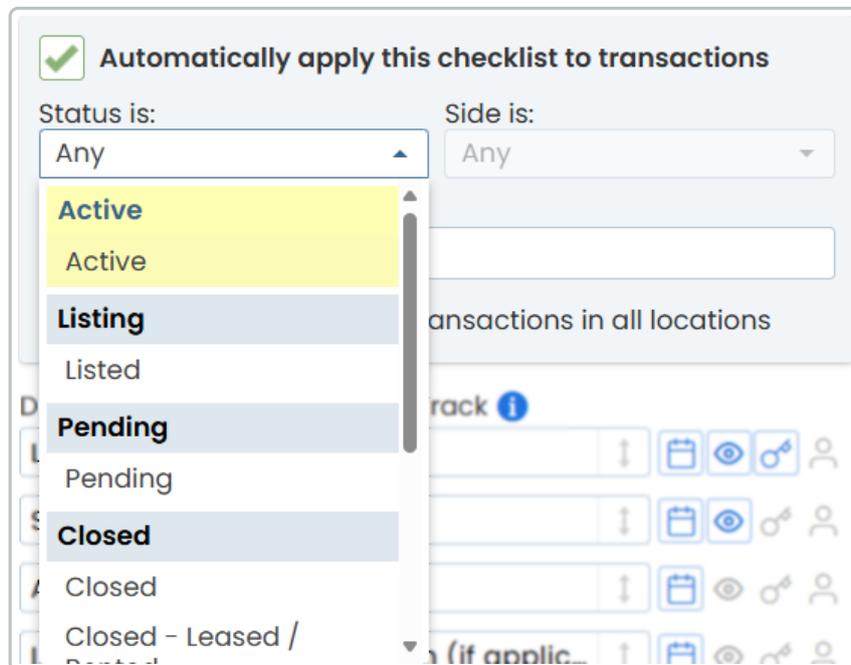


Set Rules & Save:

- Set the desired rules (described below).
- Click [Save Template] to save your changes.

Status

Select the Status that will trigger the checklist to be added to transactions.



You can specify, either:

- **Status Category:** Choose a Status Category with a blue background, such as Active, Listing, Pending, Closed, Fell Through, or Auto Expiry.
- **Custom Status:** Alternatively, select one of your company's custom Transaction Statuses listed between the blue background Status Categories.

Side

Set the checklist to apply automatically based on the Side your office represents. By default, checklists apply to any Side.

Automatically apply this checklist to transactions

Status is: Pending Side is: Any

Label is any of these: Any

Automatically apply to transactions

Listing
Buying
Dual-Sided

You can specify one of the following Side options:

- **Any:** Applies to all transactions, whether your office represents the buyer, seller, or both.
- **Listing:** Applies when your office represents the seller (with an in-house Listing Agent).
- **Buying:** Applies when your office represents the buyer (with an in-house Selling Agent).
- **Dual-sided:** Applies when your office represents both the seller and buyer (with both an in-house Listing and Selling Agent).

Label

Set the checklist to automatically apply to transactions with specific Transaction Label(s). By default, checklists apply to any Label.

Automatically apply this checklist to transactions

Status is: Any Side is: Any

Label is any of these:

Commercial
Condo
D Lease
L Lot
s Referral
A Rental
Residential

You can specify any of your company's custom Transaction Labels.

All Locations

If your office has multiple locations, this checklist will automatically apply to transactions in the Locations specified at the top of the template.

Optionally, master admins can set the checklist to be automatically applied to transactions in all locations

(described below).

Automatically Apply in All Locations

Automatically apply a checklist to transactions in all locations.

Who Can Do This: Master admins.

To automatically apply a Checklist Template to transactions in all locations:

Go to Checklist Templates :

- Click your name in the upper right corner, then [Admin / Settings].
- Select [Checklists] from the *Templates* section of the left menu.

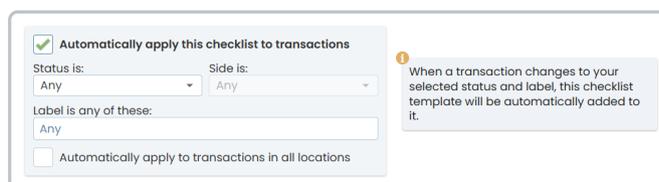
Open Template:

- Either add a new Checklist Template or edit an existing one.

[Learn how to Add & Edit Checklist Templates](#) →

Automatically Apply Checklist:

- Check the box next to "Automatically apply this checklist to transactions."



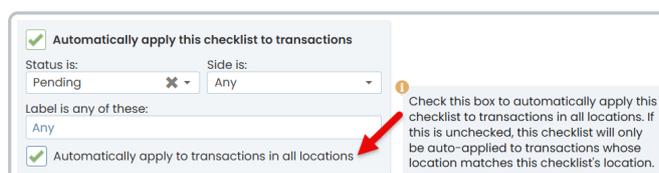
The screenshot shows a configuration form for a checklist template. At the top, the checkbox "Automatically apply this checklist to transactions" is checked. Below it are two dropdown menus: "Status is:" with "Any" selected and "Side is:" with "Any" selected. Underneath is a text input field for "Label is any of these:" containing "Any". At the bottom, the checkbox "Automatically apply to transactions in all locations" is unchecked. A yellow information icon with a question mark is on the right, with a tooltip that reads: "When a transaction changes to your selected status and label, this checklist template will be automatically added to it."

Set Rules:

- Set the desired rules ([described above](#)).

Apply to All Locations:

- Check the box next to "Automatically apply to transactions in all locations".



This screenshot is similar to the previous one, but the checkbox "Automatically apply to transactions in all locations" is now checked. A red arrow points to this checkbox. The "Status is:" dropdown is now set to "Pending" and has a clear button (X) next to it. The "Side is:" dropdown remains "Any". The "Label is any of these:" field still contains "Any". The yellow information icon and its tooltip are also present.

Save:

- Click [Save Template] to save your changes.

FAQ: Automatic Checklist Application

Troubleshooting: Automatic Checklist Application