Transaction Checklist Management

Checklists ensure compliance by tracking tasks for transactions using admin-defined templates. These templates can be added to transactions manually or automatically and customized for each transaction.

Introduction

Checklists help admins and agents stay in compliance by tracking tasks that need to be completed on a transaction. Tasks are items on a checklist that represent documents or actions that need to be uploaded or completed.

Checklist Templates are set up by an admin for use across the company's transactions. Once a Checklist Template is set up, it can be added to transactions manually or, preferably, automatically based on rules defined by an admin.

Once a checklist has been added to a transaction, it can be refined and altered to be specific to the transaction it was added to (and will not impact the template it was based on).

Add a Checklist

Add a checklist to a transaction manually when it isn't already automatically applied.

Who Can Do This: Admins and agents with Assign checklist templates to transactions permission can manually add checklists to transactions.

To manually add a checklist to a transaction:

1. Go to a transaction's Checklists area.
2. Click [⊠] in the top right corner.
3. Select your desired checklist. The checklist will be added to the transaction.

Pin a Checklist

Pin a checklist to keep it at the top of the Checklists area, ensuring it remains visible even when new checklsits are added.

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

To pin a checklist on a transaction:

1. Go to the transaction's Checklists area.
2. Hover over the checklist.
3. Click [pin]. The pinned checklist will remain at the top of the transaction's Checklists area.

Edit a Checklist

Edit a checklist to change its title, add or edit tasks, or set task due dates and visibility types.

Who Can Do This: People with *this* permission can add new Things. State the audience (person's role) and define any necessary permissions required to complete the action.

To edit a checklist on a transaction:

1. **Go to a transaction's Checklists area.**
    - Here's how to Access Checklists on Transactions →
2. **Update & Save**:
    - Make your desired update to checklists or tasks (described below).
    - Save as needed.

Edit a Checklist Title

Hover over the checklist and click [⊠].

Add a Task

At the bottom of the checklist, select [Add Doc Name or Task], then enter the task or action required.

Edit a Task

Hover over the task and click [⊠].

Edit a Task's Visibility Type

Hover over the task, click [], and select a Visibility Type.

Edit a Task's Due Date

Click the task's due date, or if none is set, hover over the task and click the [calendar] icon, then choose an Absolute or Relative Date.

Reorder a Task

Reorder a task by clicking on it, then dragging it to your desired position in the checklist.

Delete a Task

Hover over the task, then click [].

Reorder a Checklist

Reorder a checklist by moving it up or down to change its order on the transaction.

Who Can Do This: Admins with Fully manage checklists and templates permission can change the order of checklists.

To change the order of a checklist:

1. Go to the transaction's Checklists area.
2. Click and hold the checklist, then drag it to your desired position.

Delete a Checklist

Delete an unwanted checklist from a transaction.

Who Can Do This: People with this permission can add new Things. State the audience (person's role) and define any necessary permissions required to complete the action.

To delete an unwanted checklist on a transaction:

1. Go to the transaction's Checklists area.
2. Hover over the checklist, then click [x].
3. Click [delete] to confirm deletion.