Manage Checklist Templates

Manage checklist templates by editing, copying, downloading, or deleting them as your workflows evolve.

Introduction

As your business evolves, your checklist templates should stay up to date.

From the checklist templates area in **Admin / Settings**, you can manage your existing templates. You can edit templates to update tasks and settings, copy them to create new templates faster, download them as spreadsheet files for offline review, or delete templates you no longer need.

Changes made to a checklist template only apply to transactions where the checklist is added in the future. Transactions where the checklist has already been applied are not affected.

Edit a Checklist Template

Update a checklist template when your workflow, tasks, or settings need to change.

To edit a checklist template:

Go to Admin / Settings

- Click your name in the upper-right corner, then select **[Admin / Settings]**.

Open Checklists

- Select **[Checklists]** from the left menu.

Select Edit Template

- Find the template you want to edit. Click the gear icon to the right and select **[Edit Template]**.

Update the Template

- Edit any fields you need, including the name, locations, tasks, due dates, visibility, @mentions, key dates, or agent-editable settings.

Save the Template

- Click **[Save Template]**.

Copy a Checklist Template

Create a new template by copying an existing one and using it as a starting point.

To copy a checklist template:

Go to Admin / Settings

- Click your name in the upper-right corner, then select **[Admin / Settings]**.

Open Checklists

- Select **[Checklists]** from the left menu.

Select Copy Template

- Find the template you want to copy. Click the gear icon to the right and select **[Copy Template]**.

Edit the New Template

- Rename the template and adjust the tasks or settings as needed.

Delete a Checklist Template

Delete checklist templates that your team no longer uses.

To delete a checklist template:

Go to Admin / Settings

- Click your name in the upper-right corner, then select **[Admin / Settings]**.

Open Checklists

- Select **[Checklists]** from the left menu.

Select Delete

- Find the template you want to delete. Click the gear icon to the right and select **[Delete]**.

Confirm Deletion

- Click **[Delete]** again to confirm.

Deleted templates are not removed from transactions where they have already been applied.