

Add a Checklist Template

SUMMARY

Checklists are a great way to help your team keep track of tasks and required documents within a transaction. In this article, you'll learn how to create checklist templates that can later be applied to transactions.

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Create a Checklist Template

To create a checklist template:

- 1 Go to Admin / Settings
 - Click your name in the upper right corner, then [Admin / Settings].
- 2 Select [Checklists] from the left menu.
- 3 Click [Add Template].

Admin / Company Settings

Global Settings (PP Account ID: 2016-1019)

Company Name
Coffee is for Closers Realty

Brokerage License #
ABC-123

- ☐ Only allow PDF documents
- ☐ Enable Entered Docs feature
- ☒ Prevent duplicate document uploads
- ☐ Email agents expiring and closing transaction reminders
- ☒ Email agents when admin comments on documents
- ☒ Enable New Offer feature
- ☒ Enable auto-expiration of listings

Enter Basic Checklist Info

To enter basic checklist information:

- 1 Select a location, give the checklist a title, then add your tasks.
- 2 You can include as many tasks as you'd like on a template.
- 3 Add more tasks by clicking [Add more Tasks].

Lockbox Keys

Mold Disclosure

+ Add more tasks

Save Template Cancel

Delete this template

Define Relative Due Dates

Checklist tasks can have due dates defined relative to certain trigger activities. Setting relative due dates on the template means you won't have to manually add due dates to each task on a transaction.

To add or change relative due dates:

- 1 Click the [Calendar] next to a task.

Document Names or Tasks to Track

Listing Agreement

Seller's Property Disclosure

Agency Disclosure

Lead-based Paint Disclosure

Due 2 Business Days

after Expiration Date

Set Date Rule

Remove due date rule

- 2 Enter the appropriate values to build your rule.
- 3 Click [Set Date Rule]

These date rules will be resolved into actual dates when this checklist is added to a transaction or whenever the date for the defined trigger activity is updated on that transaction.

Rearrange Tasks

Rearrange tasks by hovering over the right side of a task until a hand appears then dragging it to it's desired place in the list.

The screenshot shows a web application interface for configuring a checklist. On the left is a sidebar with a search bar and a menu containing sections: 'Customize' (with items like Company Settings, Transaction Statuses, Transaction Labels, Document Labels, Document Names, Lead Sources), 'Templates' (with Business Holidays, Checklists, Break Apart Docs), 'Financials' (with Agent Fees, Client Fees, Deduction Types, Commission Basis), and 'Billing' (with Upgrade / Downgrade, Update Credit Card, Billing History). A 'Go back to Checklists' button is at the bottom of the sidebar. The main content area is titled 'Checklist Name' and has a text input field containing 'CLOSING'. Below this is a section 'Automatically apply this checklist to transactions' with a checked checkbox. It contains three dropdown menus: 'Based on Status' (set to 'Pending'), 'Based on Label' (set to '- select a label -'), and 'Based on Side' (set to 'Any'). There is also an unchecked checkbox for 'Automatically apply to transactions in all locations'. Below this is a section 'Document Names or Tasks to Track' with a link 'Learn how to mention a specific agent or admin in a task'. It contains a list of tasks, each with a text input field and a 'Visible to Anyone' toggle. The tasks listed are: 'TO AVOID A DELAY IN YOUR COMMISSION PAY OUT, PLEASE HAVE ...', 'Input CDA', 'Generate CDA', 'Upload copy of Earnest \$ deposit to transaction', 'Warranty or waiver', 'Earnest \$ deposit', 'Deposit \$', 'Inspection notice or waiver', and 'Changed status of transaction to Pending'. A mouse cursor is hovering over the right side of the 'Inspection notice or waiver' task, where a hand icon appears, indicating it can be dragged.

Automatically Assign Checklist Templates to Transactions

Pipeline can be set to automatically assign checklists to transactions whenever the status, side, or label of a transaction changes to a desired value. Checklist auto-assignment saves time for your admins and makes your transaction management workflow more reliable.

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Save a Checklist Template

Once you have completed the desired fields,click [Save Template] to save. The template is now

ready to be added to transactions.

Copy, Download, or Delete a Template

You may edit, copy, download, or delete an existing checklist template by returning to the list of checklist templates, clicking the gear, then selecting the appropriate action from the list.

CLOSING	☒ Pending	Any	Atlantic office 2	Cindy S.	Jun 8, 2018	
Sales/Purchase Checklist			Atlantic office 2	Hollis H.		Edit Template
Michele			Durham	Cindy S.		Copy Template
Closing Checklist - Condo	☒ Active	Condo	Any	East River office	Hollis H.	Download Template
Residential Listing - Before '78	☒ Listing Statuses	Residential - ...	Any	East River office	Hollis H.	Delete
Checklist A			Kingsland	Hollis H.	Dec 6, 2018	

Deleting a checklist template doesn't remove it from transactions where it was previously applied.

