

Order Automatically Assigned Checklists

SUMMARY

This article shows you how to control the order in which auto-assigned checklists are displayed on transactions. This can come in handy if there are several lists being auto-assigned at once.

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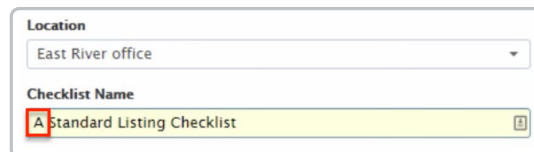
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Overview

Auto-assigned checklists are displayed in alphabetical order by default, so adding a prefix to checklist titles (e.g., 1 - 2 - 3, or A - B - C) will allow them to naturally fall in the order you specify.



Location
East River office

Checklist Name
A Standard Listing Checklist

Numeric values only work up to the number 9, so letters are recommended to allow for growth beyond 9 checklists.

Set Up Checklists for Auto-Assignment

To create a new checklist:

- 1 Go to Admin / Settings
 - Click your name in the upper right corner, then [Admin / Settings].
- 2 Click [Checklists] from the left menu.
- 3 Click [Add template]. Alternatively, click the name of an existing template to make changes to it.
- 4 When specifying the checklist's name, enter a prefix based on the order you'd like the

checklist to appear. For example, if this is the first checklist you want to be listed on a transaction, prefix the title with the letter A - or the number 1 - . If this is the second checklist you want to be listed on a transaction, prefix the title with the letter B - or number 2 - and so on.

- 5 Click "Automatically assign this checklist to transactions" and complete the section to have the checklist automatically assigned whenever the transaction's status, label, or side changes to the desired value.
- 6 Click [Save Template] to save the checklist.
- 7 Repeat the process to designate the display order of additional checklists.

 Learn more about automatically assigning checklists: [Automatically Assign Checklist Templates to Transactions →](#)

 Learn more about creating checklists: [Add a Checklist Template →](#)

Edit a Transaction's Label to See Results

When a transaction's status or label change to match the auto assignment criteria, the checklists will appear in the order you specified.

 This feature does not work on tasks inside a checklist. Tasks already appear in the order specified on the checklist template.