

Combine Duplicate Checklists into a Single Checklist with Multiple Locations or Labels

SUMMARY

Learn how to combine multiple identical *Checklist Templates* related to individual *Locations* or *Labels* into a single *Checklist Template* related to multiple *Locations* or *Labels*.

Introduction

You can now relate a single checklist to **multiple** *Locations* and **multiple** *Labels* instead of relating a checklist to either **one** or **all** *Locations* and *Transaction Labels*. This eliminates the need to create separate checklists to represent each different location/label. This new option:

- Allows you to set a single checklist to be automatically added to transactions in multiple *Locations* that have one of multiple *Labels*
- Allows you to give checklist-related permissions to a single checklist for admins in different *Locations*
- Helps organize and streamline your checklist setup since you no longer need multiple checklists to represent multiple *Locations* and *Labels*.

If you previously created multiple checklists to represent multiple *Locations* or multiple *Labels*, follow the steps in this article to combine them into a single checklist.

Steps to Combine Checklists

To combine multiple *Checklist Templates* into a single checklist:

- 1 Choose one *Checklist Template* to become your new single *Checklist Template* by editing or copying an existing *Checklist Template*, or adding a brand new one. [Learn more below.](#)
- 2 Update the *Locations* or *Labels* set for the *Checklist Template*. [Learn more below.](#)
- 3 Once you've combined the *Checklist Template* into a single checklist, delete any additional, unneeded, duplicate *Checklist Templates* you'd previously set up for each *Location* and / or *Label*. [Learn more below.](#)
- 4 Repeat these steps for each checklist you need to consolidate.

Choose a Checklist Template

Choose one *Checklist Template* to become your new single *Checklist Template* by editing or copying

an existing *Checklist Template*, or adding a brand new one. Choose the method below that best fits your needs:

Option 1: EDIT an existing checklist template to use

Pick your cleanest, most comprehensive *Checklist Template* to start from, and edit it.

To edit 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 To the right of the template you want to edit, **click the *Checklist Name*** and **select [Edit Template]**.

Any edits made on *Checklist Templates* will only affect transactions where the *Checklist* is applied in the future. Edits made will not affect transactions where that specific *Checklist* has already been added or automatically applied.

Option 2: COPY an existing checklist template to use

Pick your cleanest, most comprehensive *Checklist Template* to start from, copy it, and update the copy.

To copy 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 To the right of the template you want to copy, **click [⚙️]** and **select [Copy Template]**.

Option 3: ADD a new checklist template to use

Start fresh with a brand-new *Checklist Template* to be used across multiple *Locations* and / or *Labels*.

To add 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].

Update Locations or Labels

Update the *Locations* or *Labels* set for the *Checklist Template*.

Set Locations

If your company has more than one *Location* in Pipeline, specify which *Locations* the *Checklist* relates to. Regardless of which *Locations* are specified, any *Checklist Template* can still be manually added to any transaction.

When a *Checklist Template* is set to be automatically applied, it will only be applied to transactions within the specified *Locations*.

Only admins of the specified *Locations* will be able to make changes to the template.

To set *Locations* for a *Checklist Template*:

- 1 If your company has more than one *Location* in Pipeline, select the appropriate *Locations* for the Checklist.

Set Labels

You can optionally set checklists to automatically apply to transactions with particular *Transaction Labels*.

For example, 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.

[Learn more about Transaction Labels →](#)

To automatically apply a checklist to transactions based on *Label*:

- 1 Click the **Label** dropdown and choose your desired **Label**.

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People

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- Manage Users

Customize

- Company Settings
- Transaction Statuses
- Transaction Labels
- Document Labels
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Templates

- Business Holidays

New Checklist Template

Checklist Template Information

Locations *
Paperless Real Estate ✕

Checklist Name *

☒ **Automatically apply this checklist to transactions**

Based on Status: Under Contract ✕
Based on Side: Buying ✕

Based on Label:
Residential ✕ Commercial ✕
Condo
Land and Lot
New Build

Delete Any Extra Checklist Templates

Once you've combined the *Checklist Template* into a single checklist, delete any additional *Checklist Templates* you'd previously set up for each *Location* and / or *Label*.

To delete an unwanted *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 To the right of the template you want to delete, click [⚙️] and select [Delete].
- 4 Click [delete] again to confirm deletion.

Checklist	Auto Status	Auto Label	Auto Side	Location	Added By	Added On
Admin Closing Checklist				Paperless R...	Hollis H.	May 7, 2022
HR Checklist				Paperless R...	Hollis H.	May 7, 2022
Listing	☒ Listed		Any	Paperless R...	Hollis H.	May 7, 2022
Listing Residential	☒ Listed	Residential	Any	Paperless R...	Hollis H.	Oct 5, 2021
Listing Side	☒ Listed		Listing	Paperless R...	Hollis H.	
Pending - Required Docs	☒ Pending		Any	Paperless R...	Hollis H.	
Pre-Listing	☒ Active Statu...		Any	Paperless R...	Hollis H.	
Release Checklist				Paperless R...	Hollis H.	
Seller Closing	☒ Closed		Listing	Paperless R...	Hollis H.	Oct 5, 2021



Deleted *Checklist Templates* will not be removed from transactions where they have already been added.