Checklist Auto-Apply Rules FAQ

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An auto-apply rule watches a transaction's status, side, and label, and adds the checklist when all of them match. Answers to the common questions about what a rule can watch for, combining conditions, dual-sided transactions, and what a rule can't do.

What can an auto-apply rule be based on?

A transaction's Status, the Side your office represents, and its Label. Those three are the whole vocabulary, plus the locations the template covers. Nothing else is available as a trigger.

Do all the conditions have to match, or just one?

All of them, at the same moment. A rule set to Pending status and Buying side waits for both to be true — so a Pending transaction with no in-house agent on it yet won't trigger anything, because the side isn't decided until an agent is assigned.

Does a rule have to have a status or a label?

Yes — one or the other is required. Side alone isn't enough to set a checklist loose on your account.

Can one checklist auto-apply on more than one status?

No — a rule aims at a single status. Two ways around it: point the rule at the status *category* instead, which covers every status inside it, or copy the template and give each copy its own status.

Can a checklist auto-apply based on which agent is on the transaction?

No. There's no way to trigger a checklist off the agent assigned to a file — offices that need per-agent checklists add them by hand, or separate those agents into their own location.

Can a checklist auto-apply from a date, a custom field, or the financing type?

No — status, side, and label are the only triggers. Close dates, custom transaction fields, financing type, lead source, and doc labels can't drive a rule. The usual workaround is to encode what you need into a status or a label, so the thing you care about becomes something a rule can see.

Will a checklist apply again if a transaction returns to a status it's already been in?

Yes — a rule fires every time the transaction matches it. A deal that goes Active, then Pending, then back to Active picks up the Active checklist a second time. Remove the extra copy from the transaction, or aim the rule at a specific named status rather than the wider category so it matches less often.

If I edit a template, do the checklists already on transactions change?

No — edits only affect checklists applied from that point forward. Transactions that already carry the checklist keep the version they were given. To bring an existing transaction up to date, add the updated checklist to it by hand.

If I turn on a rule today, will it reach transactions that already exist?

No — rules only look forward. A transaction that already passed through the qualifying status won't be revisited. Add the checklist to those files by hand, and the rule takes care of everything after.

On a dual-sided transaction, can I get only the dual-sided checklist?

Not today — the Dual-Sided option is additive. It adds its checklist on top of the listing-side and buying-side checklists rather than replacing them. Build the Dual-Sided template with only the tasks that are unique to representing both sides, so what lands is one short extra list rather than a duplicate of everything.

Is there a limit to how many checklists can auto-apply to one transaction?

No limit we know of. Several rules can match the same transaction and each one adds its checklist.

What order do auto-applied checklists appear in?

Alphabetically, by template name. Prefix your template names — `A -`, `B -`, `C -` — to hold them in the order your team works them.

Can I stop a checklist auto-applying without deleting the template?

Yes — uncheck the auto-apply box on the template and save. The template stays available to add by hand, and checklists it already placed stay on their transactions.

Can a transaction be in two locations so both offices' checklists auto-apply?

No — a transaction lives in one location. When a file needs checklists that belong to two offices, aim those rules at a status, side, or label instead of relying on location.

Learn More

Set a checklist template to add itself to a transaction the moment that transaction's status, side, or label matches the rule you choose.

See [Checklist Auto-Apply Rules]

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.