Checklist Auto-Apply Rules

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

Introduction

A new file goes in and the same checklist goes on it. Buyer side gets the buyer list, listings get the listing list, commercial brings its extra disclosures. None of it is difficult. It's just work you do again every time, and the day someone forgets is the day a document goes missing.

An auto-apply rule is a standing instruction you leave on a checklist template: when a transaction looks like this, put this checklist on it. Pipeline watches the transactions in your account and adds it the moment one qualifies, so the remembering stops being anybody's job. A rule reads the things that already describe a deal, the status it's in, the side your office represents and the label on it, and you can use one of those or stack them so a checklist lands on exactly the files you meant.

Nobody builds the same list on the same kind of deal again. Your standard steps show up on their own wherever the rule matches, and because a rule is aimed at the files that come next rather than the ones already open, writing one today shapes tomorrow's work without disturbing anything in flight.

How It Works

A rule lives on the template, reads three fields off the transaction, and fires every time a transaction matches.

Where the Rule Lives

The rule belongs to the checklist template, not to any transaction. You set it under **Checklists** in your admin settings, on the same screen where the template's tasks are built — so a template's rule and its contents are always edited together.

What a Rule Can Watch

Status, Side and Label are the whole vocabulary. A rule can't watch a date, a custom field, a financing type, a lead source, or which agent is on the file. Every rule needs a status or a label to aim at, and where it sets more than one condition, all of them have to be true at the same moment.

Condition	What it catches
Status	A transaction created in that status, or moved into it. Aim at one named status, or at a whole category to catch every status inside it.
Side	The part of the deal your office represents. **Any** applies either way. **Listing** and **Buying** each wait for an in-house agent on that side, so a file with nobody assigned yet matches neither. **Dual-Sided** needs both, and adds its checklist on top of whatever the side rules already applied — keep it to the tasks that only exist when you represent both.
Label	A property type — Single Family, Condo, Commercial. Keep labels to what the property is; status already carries what stage it is at, and every extra label is another way to trip a rule you didn't intend.

When It Fires

Every time a transaction matches, not once. An offer falls through, the deal comes back to Active, and the checklist lands again — a second copy to remove. And a rule only looks forward: turning one on today does nothing to the transactions that already passed through the qualifying status.

Set a Checklist to Apply Automatically

> Turn on auto-apply for a checklist template and set the status, side, and label it should watch for.

> **Who Can Do This**: Master admins and admins with the **Fully manage checklists and templates** permission.

To set a checklist to apply automatically:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. Select [Checklists] from the left menu.
2. Click the name of the template you want, or click [Add Template] to build a new one.
3. Check the box next to [Automatically apply this checklist to transactions].
4. Click the **Status** dropdown and choose the status or status category the checklist should wait for.
5. Optionally, click the **Side** dropdown and choose **Listing**, **Buying**, or **Dual-Sided** to narrow the rule to one side. Leave it on **Any** to apply regardless of side.
6. Optionally, click the **Label** dropdown and choose the label the checklist should be limited to. A rule needs

a status or a label, so if you left Status empty, set one here.

7. Click [Save Template].

From here on, any transaction that meets every condition you set — as it's created, or the moment it's moved into that state — gets this checklist added on its own.

Apply a Checklist Automatically in Every Location

> Widen an existing auto-apply rule so it reaches transactions across your whole account, not just the template's own locations.

> **Who Can Do This**: Master admins only. If you don't see this option, it's because your role doesn't have it.

To apply a checklist automatically in every location:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. Select [Checklists] from the left menu.
2. Click the name of the template you want to widen.
3. With [Automatically apply this checklist to transactions] already checked, check the box next to [Automatically apply to transactions in all locations].
4. Click [Save Template].

The checklist now applies to every qualifying transaction in your account. Leave this box unchecked when a checklist belongs to one office — that's what keeps one location's checklists off another location's files.

Set the Order Auto-Applied Checklists Appear In

> Prefix your template names so several checklists landing at once arrive in the sequence your team works them.

> **Who Can Do This**: Master admins and admins with the **Fully manage checklists and templates** permission.

To set the order auto-applied checklists appear in:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. Select [Checklists] from the left menu.
2. Click the name of the template you want to position, or click [Add Template] to build a new one.
3. Add a prefix to the checklist's name in the order you want it to appear — `A -` for the one that should sit at the top, `B -` for the next, and so on.
4. Click [Save Template].
5. Repeat for each template you want to position.

Auto-applied checklists sort alphabetically, so the prefixes hold them in your order. Letters are the safer choice over numbers, which only sort correctly up to nine. This sets the order of the checklists themselves — tasks inside a checklist already appear in the order set on the template.

Turn Off Automatic Assignment for a Checklist

> Stop a template from applying itself, without deleting the template or touching the checklists it already placed.

> **Who Can Do This**: Master admins and admins with the **Fully manage checklists and templates** permission.

To turn off automatic assignment for a checklist:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. Select [Checklists] from the left menu.
2. Click the name of the template you want to stop.
3. Uncheck the box next to [Automatically apply this checklist to transactions].
4. Click [Save Template].

The template stops applying itself to new transactions. It stays in your settings and is still available to add by hand, and every checklist it already placed on a transaction stays exactly where it is.

Cover the Deals That Are Already Open

You've written the rule and there's a back catalog sitting behind it — the files opened last month, the ones mid-flight right now. None of them will trip a rule they already passed, so they're a one-off job by hand while the rule takes care of everything after them.

Add a checklist to a single transaction by hand — for when it wasn't assigned automatically.

See Applying a Checklist

Give the Rule Something to Aim At

A rule can only point at a label your account already has. If the checklist you're automating belongs to commercial deals, or leases, or new construction, the label list is where that rule actually starts.

Labels classify your transactions by property type, and they drive the checklists Pipeline auto-assigns.

See Transaction Labels

Checklist Auto-Apply Rules FAQ

A rule reads a transaction's status, side, and label, and fires whenever 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. See Checklist Auto-Apply Rules FAQ.

Checklist Auto-Apply Rules Troubleshooting

Rule not behaving? Start here.

- Why Didn't My Checklist Auto-Apply?
- Duplicate or Unwanted Checklists Are Auto-Applying