Duplicate or Unwanted Checklists Are Auto-Applying

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Too many checklists landing is the same problem as too few, read from the other side: a rule is matching more transactions than you meant it to. Here's what's usually behind it.

Remove the Extra Checklist First

Whatever the cause turns out to be, you can clear what's already on the transaction right away. Hover over the checklist's name in the transaction's **Checklists** area and click the [X] to remove it. That takes care of today's file — the sections below stop it happening again.

The Transaction Came Back to a Status It Had Already Been In

A rule isn't a one-time event; it fires every time a transaction matches it. So a deal that went Active, then Pending, then back to Active when the offer fell through picks up the Active checklist a second time. That's the design, not a fault.

Remove the extra copy. To make it happen less often, aim the rule at a single named status rather than the wider status category, so fewer moves count as a match.

A Copied Template Kept the Original's Rule

When you copy a checklist template, the copy comes with the original's auto-apply rule attached — so two templates now match the same transactions and both land. Open [Checklists] in your admin settings and check whether there are two templates with the same rule. Either delete the copy, or give it its own rule so the two aim at different transactions.

The Rule Is Broader Than You Meant

A rule with a status and nothing else applies to every transaction that reaches that status — a commercial checklist set only to Pending will land on residential files too. Narrow it: open the template and add the label that describes the transactions it actually belongs on, so status and label have to agree before the checklist lands.

A Checklist From Another Location Is Landing

If a template is set to apply in every location, it reaches transactions company-wide by design. When a checklist belongs to one office, open the template, confirm it's on the right location, and uncheck **Automatically apply to transactions in all locations**, then save.

Both Side Checklists Land on a Dual-Sided Transaction

When your office represents both sides, the listing-side rule and the buying-side rule both match — and a Dual-Sided rule adds a third checklist on top rather than replacing them. The Dual-Sided option is additive by design; there's no setting that suppresses the side checklists.

What works is designing around it: keep the Dual-Sided template down to the tasks that are unique to holding both sides, and let the listing and buying templates carry their own. Then what a dual-sided file picks up is one short extra list instead of a third copy of everything.

The Same Task Shows Up on Several Checklists

Sometimes the duplicate isn't a whole checklist, it's one task — a closing-date task sitting on both the listing template and the buying template, so a dual-sided file gets it twice. Pull that task off the side templates and give it a small template of its own, aimed at the status it belongs to with Side set to **Any**. It then lands once, whichever side you're on.

Still Getting Duplicates?

If none of the above explains it, contact us — send the checklist names and a transaction that's carrying the duplicates, and we'll trace which rules matched.

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.