Why Didn't My Checklist Auto-Apply?

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Almost every time a checklist doesn't land, the rule is fine and the transaction didn't match all of it. Here's how to find the condition that missed.

Start Here: Compare the Rule to the Transaction

An auto-apply rule fires only when **every** condition on it is true at the same moment. So the fastest way through this is to put the two side by side.

Open the template — [Gear] in the upper-right corner, then [Admin / Settings], then [Checklists] — and write down what the rule actually says: its status, its side, its label, and the locations on the template. Then open the transaction and check each one against it. The cause is nearly always in that comparison, and the sections below are the ones that come up most.

The Rule Was Never Turned On

A template can carry a status and a side and still do nothing, because the master switch is separate from the conditions. Open the template and confirm the box next to **Automatically apply this checklist to transactions** is actually checked. If it isn't, check it, confirm the rule underneath is what you want, and save.

The Transaction Has No In-House Agent Yet

This is the most common miss, and it doesn't look like a rule problem at all. Side isn't something you set — Pipeline works it out from the agents on the transaction. Until an in-house agent is added, the transaction has no side, so a rule that specifies Listing, Buying, or Dual-Sided has nothing to match against.

Add the in-house agent to the transaction. If the transaction is already in the qualifying status, the checklist lands as soon as the side resolves.

The Side on the Rule Is Too Narrow

A rule set to Buying will never fire on a listing-side file, however right the status is. If the checklist belongs on the deal regardless of which side you're on, open the template and set **Side** back to **Any**.

The Transaction Is Missing the Label

When a rule sets a label as well as a status, a transaction with no label — or with a different one — won't qualify, even though the status is right. Two ways out: add the missing label to the transaction, or, if the checklist should apply no matter the property type, remove the label condition from the rule so status alone drives it.

The Label on the Rule Names One That Was Renamed

This is the one that looks like nothing is wrong. The rule reads correctly, the transaction carries a label, and nobody changed anything recently — but the label was renamed at some point, and the rule still points at the name it had before. It matches nothing, and it does so quietly.

Open the template, read the label on the rule, and check it against the labels on your account today. If it names one that no longer exists, point the rule at the current label and save.

The Transaction Was Created in a Different Status

A rule aimed at Pending won't fire on a transaction created in Listing, and it won't fire retroactively when you notice later. If your office typically creates files in a status the rule doesn't cover, that's the fix — point the rule at the status your transactions actually start in, or at the wider status category that includes both.

The Template Doesn't Cover That Location

A checklist auto-applies within the locations set on its template. When a file sits in a location the template doesn't include, nothing happens. Open the template and either add that location to it, or — if the checklist belongs to the whole company — have a master admin check **Automatically apply to transactions in all locations**.

The Rule Was Added After the Fact

Rules only look forward. If you built or changed the rule after the transaction was already created in — or already moved into — the qualifying status, that transaction was never evaluated against it. Add the checklist to that file by hand; everything from here on is covered by the rule.

Still Not Applying?

If the rule and the transaction match on every condition and the checklist still isn't landing, contact us — send the checklist name and the transaction it should have applied to, and we'll trace it.

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.