Adding a Checklist Template FAQ

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You add a checklist template under Checklists in your admin settings, then name it, choose its locations, and add its tasks. Answers to the common questions about adding a new template.

Who can add a checklist template?

A master admin, or an admin with the *Fully manage checklists and templates* permission. Agents don't build templates — they work the checklists once they're applied to a transaction.

Where do I add a template?

Under [Checklists] in your admin settings. Click the [Gear] in the upper-right corner, go to [Admin / Settings], select [Checklists], and click [Add Template].

Do I have to add all the tasks right away?

No. Add what you have now and save — you can open the template and add or change tasks anytime. To move a long list in at once, use [Bulk Add Tasks] and paste it in.

Can one template cover more than one location?

Yes. When you add a template you choose the location or locations it applies to, so a single template can serve several offices at once.

What's the difference between adding a template and copying one?

Adding starts from a blank template; copying starts from an existing one. If a new template is close to one you already have, copying it is faster — see Checklist Templates for copying, editing, and downloading.

Learn More

Build a new checklist template from scratch — name it, pick the locations that use it, and load it with the tasks a deal depends on.

See Adding a Checklist Template

Still Have Questions?

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