Adding a Checklist Template

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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.

Introduction

Every office has a process that lives in somebody's head. The eleven things that have to happen before a listing goes live, the documents a closing can't proceed without, the order it all has to happen in. It works right up until that person is on holiday.

A checklist template is that process, written down once and reusable. You build it in your admin settings with the tasks a deal actually depends on, decide which locations use it, and from then on it can go onto a transaction by hand or attach itself automatically when the right kind of deal appears. The tasks come with it, and so does whatever timing you gave them.

The process stops depending on the person who wrote it. New coordinators inherit the process instead of learning it by asking, and files start looking the same whoever opened them.

How It Works

A new template starts empty and takes three things: a name, the locations it belongs to, and its tasks.

Where You Build One

Templates live under [Checklists] in your admin settings. That's where you add a new one and where every existing template is managed.

What You'll Enter

A template takes a location, a name, and its tasks — plus whatever due-date rule, visibility setting, key-date flag, and @mention each of those tasks needs. Every field is described below, under *Add a Checklist Template*. Settings you put on a task here are inherited by every transaction the checklist lands on.

Two Ways to Add Tasks

Type each task into the list one at a time, or click [Bulk Add Tasks] to paste a whole list at once — handy when you're moving a checklist over from a document or another system.

Add a Checklist Template

> Create a new template from the Checklists page in your admin settings.

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

To add a checklist template:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. Select [Checklists] from the left menu, then click [Add Template].

2. Add the information you have available for the template (outlined below), then click [Save Template].

Location

Select the **Location** or locations the template applies to, if your account has more than one.

Template Name

Enter the **Template Name** that tells your team what the checklist is for.

Document Names or Tasks to Track

Enter each task — the documents to collect and the steps to finish — in the**Document Names or Tasks to Track** list. Include as many as you'd like, clicking [Add more Tasks] for another row. See Document Names or Tasks to Track.

Bulk Add Tasks

To add a whole list at once, click [**Bulk Add Tasks**], paste or type your tasks one per line, then click [Add Tasks]. They drop into the task list above, ready to adjust.

Task Due Dates

Give a task a due date calculated from a trigger instead of set by hand: click the [Calendar] next to the task, enter the values that build your rule, then click [Set Date Rule]. See Task Due Dates.

Task Visibility

Set each task's **Visibility** so everyone gets just the tasks that belong to them. See Task Visibility.

Key Dates

Mark a task as a **Key Date** and its deadline carries onto coversheets, calendars, and your emails. See Key Dates.

Task @Mentions

Type @ and a name in a task to highlight it for the person who owns it. See Task @Mentions.

Task Order

Put the tasks in the order your team works them — hover over the right side of a task until a hand appears, then drag it into place.

Automatic Assignment

Set the template to apply itself when a transaction's status, side, or label matches a rule you choose. See Checklist Auto-Apply Rules.

After You Add It

Once a template exists, everything else you'd do with it — editing, copying, downloading a backup, or deleting it — is covered in Checklist Templates.

Adding a Checklist Template FAQ

You add a template under Checklists in your admin settings, then name it, choose its locations, and add its tasks. Answers to the common questions about who can add one, adding tasks, and covering more than one location. See Adding a Checklist Template FAQ.