Checklist Templates FAQ

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Admins build templates, reuse them across transactions, and edit them without disturbing files already in flight. Answers to the common questions about who manages them, what editing changes, and getting a copy out of Pipeline.

Who can create and edit checklist templates?

Master admins and admins with the *Fully manage checklists and templates* permission. Anyone without that permission can use checklists on transactions but can't build or change the templates themselves.

Can agents edit my templates or add their own tasks?

No. Building templates and managing tasks is an admin function. Agents can be given permission to add a checklist to a transaction, but they can't rename tasks, add new ones, or change your templates.

If I edit a template, does it change transactions that already have the checklist?

No — edits only apply going forward. Changes to a template affect transactions where the checklist is added *after* the edit. Any transaction that already carries the checklist keeps its existing tasks.

If I delete a template, does it disappear from transactions?

No. Deleting a template removes it from your settings, but transactions where it was already applied keep their checklist and tasks.

How many tasks can one template hold?

As many as you need. There's no set limit — add every document and step a transaction requires, one task at a time or in bulk.

Can I download or print my templates?

Yes — download any template as a CSV spreadsheet. From the Checklists page, click the gear next to a template and choose [Download Template]. The CSV opens in your spreadsheet app, where you can review the whole list in order and print it.

Can a template apply to transactions automatically?

Yes. A template can be set to apply on its own when a transaction's status, side, or label matches rules you choose. Automatic assignment is covered in the Automation guides.

Learn More

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates

Still Have Questions?

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