Checklist Templates

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

Introduction

Every listing needs the same set of documents, and typing them onto each new transaction is work you already did last week. A checklist template is that list, built once. It holds the tasks a particular kind of deal depends on, so the checklist arrives on the transaction already filled in.

Templates live in your account's admin settings rather than on any one transaction, which is why a whole office can run off the same version and one person can change it. Most accounts end up with a small set: a listing checklist, a buyer-side checklist, sometimes one per office or per type of deal. Each task on a template carries its own settings along with it, so those details get decided once instead of on every file.

One process, not one per person: a new agent follows the same steps as everyone else without being walked through them. Templates are also safe to keep refining, because a transaction holds its own copy of the checklist it already has, so tightening a template later doesn't reach back into deals that are already in flight.

How It Works

Templates live in your admin settings, carry all their task settings with them, and can be reused, backed up, and shared.

What a Template Holds

Every template has a name, the location or locations it belongs to, and a list of tasks. Each task can carry its own due-date rule, visibility setting, key-date flag, and @mention — set them once on the template, and every transaction the checklist lands on carries them too.

Build Once, Reuse Everywhere

The point of a template is that you define your process a single time. Editing a template only changes transactions the checklist reaches *in the future* — Pipeline leaves checklists already on transactions untouched, so past files stay exactly as they were.

Add It by Hand or Let It Apply Itself

You can add a template to a transaction by hand whenever you need it. You can also set a template to apply automatically when a transaction's status, side, or label matches rules you choose — that automatic assignment is covered in the Automation guides.

Back Up and Share

Download any template as a CSV spreadsheet to review the whole thing in one view, keep a backup, or hand it to an outside broker or manager.

Add a Checklist Template

Create a new template from the Checklists page in your admin settings. Every field is described in Adding a Checklist Template.

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 in Adding a Checklist Template — then click [Save Template].

Edit a Checklist Template

Update an existing template from the Checklists page.

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

To edit a checklist template:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Select [Checklists] from the left menu.
3. To the right of the template you want to change, click [the gear] and select [Edit Template].
4. Make your changes, then click [Save Template].

Your edits apply to transactions that get the checklist from here on — transactions that already have the checklist keep their current tasks.

Copy a Checklist Template

Duplicate a template to use it as the starting point for a new one.

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

To copy a checklist template:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Select [Checklists] from the left menu.
3. To the right of the template you want to copy, click [the gear] and select [Copy Template].

A duplicate opens ready to rename and adjust, so you can spin up a variation without rebuilding it from scratch.

Download a Checklist Template as a CSV

Save any template to your computer as a spreadsheet for review, backup, or sharing.

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

To download a checklist template as a CSV:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Select [Checklists] from the left menu.
3. To the right of the template you want to download, click [the gear] and select [Download Template].
4. Choose where to save the file on your computer, then click [Save].

The template downloads as a CSV spreadsheet you can open, print, or email as an attachment.

Delete a Checklist Template

Remove a template you no longer use from the Checklists page.

Who Can Do This: Master admins and admins with the *Fully manage checklists and templates* permission. Deleting a template doesn't remove it from transactions that already have it.

To delete a checklist template:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Select [Checklists] from the left menu.
3. To the right of the template you want to delete, click [the gear] and select [Delete].
4. Click [delete] again to confirm.

Pipeline removes the template from your settings, but any transaction that already carries the checklist keeps it.

Let the Kind of Deal Choose the Checklist

Set a template to attach itself when a transaction's label matches — but only if your office has labels for it to match against. That list is company-wide and only a master admin can add to it, so it's worth seeing what's already there before you plan a template around it.

Labels classify your transactions by property type, and they drive the checklists Pipeline auto-assigns.

See [Transaction Labels]

Checklist Templates FAQ

Templates are reusable, editing one only affects future transactions, and deleting one leaves existing checklists in place. Answers to the common questions about who can build them, whether agents can edit them, and downloading your templates. See [Checklist Templates FAQ].

Ways to Use Checklist Templates

See Checklist Templates at work inside a bigger job:

- [Build a Family of Similar Checklists Without Starting Over]