Move Your Checklists Into Another Account

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Opening a second office or standing up a franchise account? Your checklist templates can come with you — by hand for free, or by our Tech Team for a fee.

Introduction

A new account starts empty. If your process lives in a dozen checklist templates you've been refining for years, rebuilding them by hand is the first week of the new office gone. The version you rebuild from memory is never quite the version you had.

There's no one-click transfer between accounts. The two are fully separate, and nothing crosses on its own. What there are, are two routes. The free one is a CSV out of the old account and a bulk paste into the new one, with the settings re-applied by hand. The paid one hands the whole job to our Tech Team, auto-assign rules included.

Which you want turns on how much your templates carry besides their task names. A list of documents moves fine by hand. A set of templates wired into statuses, labels, relative due dates and auto-assign rules is a different animal, and that's what the fee is for.

When to Use This

- A second company or a franchise office is standing up its own account and should run your process.
- You've been told to just recreate them, and there are forty.
- A related office wants to copy your templates into their account, or you want to copy theirs.
- Your templates carry auto-assign rules, labels, and statuses you'd rather not rebuild from scratch.
- You're moving to Pipeline from another transaction system and want your existing checklists brought in.

> Copying a template *inside* one account is a different, much simpler job. Most of your checklists are one list with a few tasks swapped. Copy the one you already trust, change only what's different, and let each version carry its own trigger. See Build a Family of Similar Checklists Without Starting Over.

Why There's No One-Click Transfer

The reasonable instinct is that a checklist template is a list of task names, so moving one should be an export and an import. But most of a template isn't the task names. It's the relative due date rule on each task, the visibility setting, the @mention, the key-date flag, the locations it belongs to, and the rule that decides which transactions it lands on. Every one of those points at something that exists in one account and doesn't yet exist in the other.

So the free path moves what travels cleanly — the names — and asks you to re-set the rest with the spreadsheet open beside you. The paid path is someone on our end doing that same work carefully, in an account where the statuses and labels have been squared away first. Either way, the work is the wiring, not the words.

1. Pick the Free Path or the Paid One

Free — you download each template as a CSV, paste the task names into a new template in the destination account, and put the due dates, visibility and mentions back by hand. Right when there are a handful of templates, or when they're mostly plain document lists.

Paid — our Tech Team copies them across. It starts at $75 and rises with volume and complexity; a franchise-scale copy that brings auto-assign rules, labels and statuses along has run $150. Both accounts have to be on a paid plan, and we need written authorization from the master admin on each. A small number of easily rebuilt checklists isn't eligible — we'll point you at the free path instead, because it'll be done before the paperwork clears.

> Brand new to Pipeline and coming from another transaction system? Send your existing checklists to us before your account setup call and we'll bring them in as part of getting you started.

2. Download Each Template as a CSV

In the source account, download every template you're moving. There's no export-them-all button, so it's one file per template — and it's worth doing even on the paid path, because the CSVs are your record of what the templates looked like before anyone touched them.

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

See Checklist Templates

3. Build the Template and Bulk Add the Tasks

In the destination account, create the template, name it, and pick the locations that will use it. Then use **Bulk Add Tasks** and paste the task names straight from the CSV, one per line — the whole list lands at once rather than one row at a time.

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

4. Re-Set What the CSV Doesn't Carry

The names came across. Nothing else did. Work down the new template once with the CSV open beside you and put back the three things that make it a working checklist rather than a list.

The due date rules first, because they're what puts the tasks on anyone's radar at all.

A due date is what puts a task on your Tasks page, into your reminder emails, and onto your calendar — and taking it back off is how you quiet a task you no longer need.

See Task Due Dates

Then visibility, so each person still gets only their own share of the list.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility

Then the mentions.

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See Task @Mentions

> An @mention matches against the **Role** on a user's profile, so it can't land in an account that has no users yet. Add the roster and set the roles first, or come back for the mentions once you have.

5. Rebuild the Statuses and Labels Before the Rules

This is the step that stalls transfers, including the paid ones. An auto-assign rule doesn't stand alone — it points at a status, a side, or a transaction label. If the destination account doesn't have the status the rule names, or its labels are wired to statuses differently, the rule has nothing to attach to and the copy stops there.

So square those away first: create the statuses the rules expect, check how labels relate to them, and only then set the rules.

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

6. Hand the Job to Our Tech Team

If you're taking the paid path, get in touch and tell us three things up front — it's what turns a quote into a scheduled job.

Include in your request:

1. Which Locations' checklists you want copied.
2. Whether auto-assign rules, transaction labels, and statuses should come across too, or task lists only.
3. Written authorization from the master admin of the source account and of the destination account.

Need a hand? The quickest way to reach us is right inside Pipeline — and a real person on our team reads every message.

See Get Help