Applying a Checklist FAQ

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Applying a checklist means adding one to a single transaction by hand, straight from the Checklists area. Answers to the common questions about who can add checklists, automatic assignment, and adding to more than one transaction.

How do I add a checklist to a transaction?

Open the transaction, click [?] in the Checklists area, and pick a checklist from the dropdown. It's added with all of its tasks, ready to tailor to that deal.

Who can add a checklist to a transaction?

Agents and admins with permission to assign checklist templates to transactions. Reordering, renaming, or removing a checklist afterward takes the fuller "Fully manage checklists and templates" permission.

Can checklists be added automatically?

Yes — set up automatic assignment so you don't have to add them by hand. In the Automation settings, Pipeline can add a checklist based on a transaction's status, label, or side. Adding by hand is best kept for one-off checklists.

Can I add the same checklist more than once?

You can, but it isn't recommended. The checklist will appear twice and its tasks will count twice toward the completion percentage. If you've added a duplicate, remove the extra copy from the Checklists panel.

Can I add one checklist to several transactions at once?

Not today. There's no built-in way to apply a checklist to multiple transactions in one step. For a checklist that belongs on every deal, automatic assignment is the closest thing — it adds the checklist for you as new transactions match your rules.

Learn More

Add a checklist to a single transaction by hand — for when it wasn't assigned automatically.

See Applying a Checklist

Still Have Questions?

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