Applying a Checklist

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

Introduction

Most checklists arrive on their own, matched to the transaction by rules an admin set up in advance. Then comes the deal that doesn't fit the pattern: an amendment with its own follow-ups, a file review, a listing that changed shape after it was created. Applying a checklist is how you put one on by hand.

What you're placing is a copy of a checklist template, so the tasks land already carrying their due-date rules, their visibility, and any mentions on them. From that moment the copy belongs to the transaction. You can add a task, rename one, or take one off for this deal alone, and the template everyone else works from stays untouched.

The benefit is that the automatic set covers the routine and you cover the exceptions, without either getting in the other's way. Worth a glance before you add one: a checklist that was going to auto-apply may already be on its way, and a transaction holds the same checklist twice quite happily. If a duplicate does turn up, the transaction's history shows how each copy got there.

How It Works

You apply a checklist from the transaction itself, choosing the template you want from a dropdown.

Where Checklists Are Added

Every transaction has a **Checklists** area in its left menu. The [?] at the top of that area is where you pick a template to add.

By Hand or Automatically

Applying a checklist by hand is best for one-off situations. If the same checklist belongs on every deal, the better path is to set up automatic assignment so Pipeline adds it for you — see the note below.

Add a Checklist to a Transaction

Apply a checklist by hand from the transaction's Checklists area.

Who Can Do This: Agents and admins with permission to assign checklist templates to transactions.

To add a checklist to a transaction:

1. From an open transaction, go to the **Checklists** area in the left menu.

2. Click [?] at the top of the Checklists area.

3. Select the checklist you want from the dropdown list.

The checklist is added to that transaction with all of its tasks. You can tailor it to this transaction without changing the template it came from.

> **Adding the same checklist to every deal?** Instead of applying it by hand each time, you can set up automatic assignment in the Automation settings, where Pipeline adds a checklist for you based on a transaction's status, label, or side.

Stop Adding the Same List by Hand

Adding one checklist to one unusual file is a minute's work. Putting the same one on every buyer file you open for the rest of the year is a different job, and it isn't the one this page is for.

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

Applying a Checklist FAQ

Applying a checklist means adding one to a single transaction by hand. Answers to the common questions about who can add checklists, automatic assignment, and adding to more than one transaction. See Applying a Checklist FAQ.