Checklists Panel FAQ

Last Modified on 09/04/2026 11:06 am EDT

The Checklists area is your home base for a transaction's checklists. Answers to the common questions about finding it, removing checklists, scrolling, and why your view settings stick.

Where do I find a transaction's checklists?

In the Checklists area of the transaction's left menu. Each checklist applied to the transaction sits there as its own section, newest on top.

How do I remove a checklist from a transaction?

Hover over the checklist, click the [⍰] on the right, then [Delete]. This removes it from that transaction only — the Checklist Template and every other transaction are untouched.

What is checklist scrolling?

It lets the checklists scroll on their own, separately from the main transaction page. That's handy for a long list of tasks, for dragging tasks into messages, and it also needs to be on for Smart Checklists to match documents to tasks.

I turned checklist scrolling off, but it keeps coming back — why?

Your scrolling choice is meant to stick. Set it from the [⋮] menu and Pipeline should remember it every time you return. If it keeps switching back after a page refresh, email us at help@paperlesspipeline.com and we'll take a look.

Does renaming or reordering a checklist change the template?

No. Any change you make to a checklist on a transaction stays on that transaction. The template it came from — and every other deal using it — is unaffected.

Will my teammates see the panel the same way I do?

Not necessarily. Checklist scrolling, sort-by-date, and hide-@mention are personal display settings. Yours change your view only; your teammates keep their own.

Learn More

The Checklists area is where a transaction's checklists live — expand them, reorder them, and set how they display.

See Checklists Panel

Still Have Questions?

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