# Checklists Panel

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

## Introduction

Every transaction keeps its checklists in one place, in the left menu under Checklists. Whatever landed on the deal sits there: the listing list, the closing list, whatever an amendment brought with it, stacked with the newest on top.

The area does two jobs at once, and it helps to know which is which. Some of what happens here changes the transaction for everybody who opens it, like renaming a checklist, reordering the lists, or taking one off. The rest is only your own view: whether lists sit open or collapsed, whether finished tasks stay on screen, how the tasks inside a list are arranged. Those choices follow you from transaction to transaction, and nobody else sees them.

It's a working area rather than a display, with the deal's outstanding work in one column, arranged the way you read it fastest. And if a checklist you expected isn't showing, that's worth looking into rather than shrugging off. Nothing removes a checklist on its own, and the transaction's history records every one that was added or taken away.

## How It Works

The panel pairs your list of checklists with a small set of controls — one for expanding each list, and a view menu for how tasks display.

### The Checklists Area

Open any transaction and the Checklists area sits in the left menu, one section per checklist. By default, checklists appear in the order they arrived, with the most recent on top.

### Expand and Collapse a List

Next to any checklist, click [?] to show it or [?] to hide it. Pipeline remembers whether you expanded or collapsed each one the next time you open that transaction.

### Your View Options

The [ ⋮ ] menu at the top of the Checklists area holds three personal display settings: **Checklist scrolling** (scroll the checklists independently of the main page), **Sort by date** (order tasks by due date instead of the order an admin set), and **Hide @mention** (tuck away @mention text to make task names easier to read).

## Add a Checklist to a Transaction

> Apply a checklist by hand from the transaction's Checklists area. The full how-to is in [Applying a Checklist](Applying a Checklist).

> **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, then click [?] at the top.
2. Select the checklist you want from the dropdown list — outlined in Applying a Checklist.

The checklist lands on that transaction with all of its tasks.

## Reorder Checklists

> Drag a checklist into the position you want within the Checklists area.

> **Who Can Do This**: Admins with permission to fully manage checklists and templates.

To reorder checklists:

1. From an open transaction, go to the **Checklists** area.
2. Click and hold the **title** of a checklist.
3. Drag it to the position you want, then release.

The checklists settle into your new order. To keep one checklist locked at the top no matter what, see Pinned Checklist.

## Rename a Checklist

> Edit a checklist's title right on the transaction.

> **Who Can Do This**: Admins with permission to fully manage checklists and templates.

To rename a checklist:

1. From an open transaction's Checklists area, hover over the checklist and click the [pencil].

2. Update the checklist title.
3. Click [Save].

The new title applies to this transaction only — the template it came from is unchanged.

## Remove a Checklist

> Delete a checklist from a single transaction when it doesn't apply.

> **Who Can Do This**: Admins with permission to fully manage checklists and templates.

To remove a checklist:

1. From an open transaction's Checklists area, hover over the checklist you want to remove.
2. Click the [⍰] that appears to the right.
3. Click [Delete] to confirm.

The checklist comes off that transaction only. It never affects the Checklist Template or any other transaction.

## Set Your Checklist View Options

> Turn scrolling, due-date sorting, or hidden @mentions on or off from the view menu.

> **Who Can Do This**: Anyone with access to the transaction — these are personal display settings.

To set your checklist view options:

1. From an open transaction, click [ ⋮ ] at the top of the Checklists area.
2. Check any options you want: **Checklist scrolling**, **Sort by date**, or **Hide @mention**.
3. Click [Done].

Pipeline remembers each of these preferences and applies them whenever you return to any transaction.

## Checklists Panel FAQ

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

## Ways to Use Checklists Panel

See Checklists Panel at work inside a bigger job:

- Send Outstanding Items to an Agent or a Client