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.

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.

Frequently Asked Questions

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.