Pinned Checklist

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

Keep the checklist that matters most at the top of a transaction, even as new ones are added.

Introduction

A transaction picks up more checklists as it moves: a listing list, then an under-contract list, then whatever the amendments bring. The newest one lands on top, so the list you're actually working from slides further down every time. Pinning holds one checklist in first place, where you keep looking for it.

The pin is a small thing, but on a file carrying four or five lists it decides how the whole area reads. Pin the checklist that drives the deal and every later addition stacks up underneath it rather than in front of it. Nothing else about that checklist changes: its tasks, its due dates, and who can see them all stay exactly as they were.

How It Works

Pinning changes where a single checklist sits relative to the transaction's normal ordering.

Default Checklist Order

By default, checklists appear in the order they were added, with the most recently added at the top. As new checklists arrive, older ones move down.

What Pinning Does

A pinned checklist stays at the top of the Checklists area no matter what — even after newer checklists are added below it. If you just want to shuffle the order by hand instead, see Checklists Panel.

Pin a Checklist

> Fix a checklist to the top of the transaction's Checklists area.

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

To pin a checklist:

1. From an open transaction, go to the **Checklists** area.
2. Hover over the name of the checklist you want to pin.
3. Click [the pin icon] that appears next to the checklist's name.

The pinned checklist stays at the top of the transaction's Checklists area, even once new checklists are added.