Checklist Permissions FAQ

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

Two permissions govern checklists, agents can agent-check tasks while only admins complete them, and building templates is admin territory. Answers to the common questions about letting agents add checklists, who can build templates, editing due dates, and why an agent can't check items off.

How do I let agents add a checklist to their own transactions?

Grant them *Assign checklist templates to transactions*. That permission lets an agent apply a checklist to transactions they can see, without opening up any admin-level control. It does not let them check items off or change tasks and due dates.

Why can an agent view a transaction but not check items off the checklist?

Marking a task *complete* is admin-only. Any agent on the transaction can agent-check a task (mark it done) or mark it not applicable to signal it's ready for review — that's their part of the workflow. Only an admin with *Fully manage checklists and templates* can mark a task fully complete. If the person needs to complete tasks themselves, grant them that permission; if they can't even agent-check, confirm they're actually added to the transaction as an agent.

Can agents create or edit checklist templates?

No — templates are admin-only. Only master admins and admins with *Fully manage checklists and templates* can build, edit, copy, or delete checklist templates. Agents work from the templates your admins set up.

Can an agent change a task's due date?

Only if an admin allowed it on that task. Due dates are admin-managed by default. An admin can flag a specific task with *Allow Agents to Change a Task's Due Date*, and only then can agents edit that task's due date on the transaction.

Can I let agents add checklist items but not delete them?

Not as separate toggles today. Adding and deleting tasks are part of the same *Fully manage checklists and templates* admin permission — there's no setting that grants add-only. Many offices have agents mark unneeded tasks as not applicable instead of deleting them. If splitting these would help your workflow, email us — customer feedback like this shapes what we build.

Who can delete a checklist or task from a transaction?

Admins with *Fully manage checklists and templates*. Deleting a checklist or a task from a transaction is an admin action, and it only affects that transaction — the underlying template is untouched.

What's the difference between an agent, a location admin, and a master admin here?

It's the scope of what they can do with checklists.An agent works and agent-checks tasks on their own transactions; a location admin with *Fully manage checklists and templates* runs checklists and templates within their locations; a master admin can do everything across the whole account. See the role guides for Master Admin, Admin / Staff (Location Admin), and Agents.

Learn More

See Checklist Permissions and Checklist Access.

Still Have Questions?

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