Checklist Permissions

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Permissions decide what someone can do with checklists: apply them to transactions, build and edit templates, and check tasks off. You set them per user, per location.

Introduction

Two people can open the same transaction, see the same checklist, and only one of them can change it. Access decides whether a checklist is in front of you. Permissions decide what you're allowed to do with it once it is.

The split exists because a checklist is a compliance record as much as a work list. What's on it, and who signed off that an item was handled, is what an office relies on when somebody asks about the file a year later. That's why building and editing checklists is held more tightly than working through one, and why the mark an agent puts on a task reads differently from the one an admin puts there.

You grant permissions per person and per location, so somebody can hold full control in one office and none in another. That's usually the answer when the permissions look right and the behavior doesn't: check the location the transaction lives in. And when a permission you need isn't switched on, it's a setting someone in your account can turn on for you rather than a limit built into your plan.

How It Works

Two permissions govern checklists, and a handful of built-in rules fill in the rest. Together they keep agents moving their own work forward while admins stay accountable for the whole checklist.

Grant Them Per User, Per Location

You grant checklist permissions to a user for each location they work in, so the same person can have different abilities in different offices. The permissions travel with them into every transaction in that location.

Who Can Do What With a Checklist

Who	What they can do
Any agent on the transaction No permission needed	**Agent-check** a task to mark it done, or mark it **not applicable**, either way signalling it's ready for an admin's review. Change a task's due date too, but only where an admin has flagged that task with *Allow Agents to Change a Task's Due Date*.
Assign checklist templates to transactions Agent-friendly	Apply a checklist to transactions they can see. It doesn't cover checking items off or changing tasks and due dates.
Fully manage checklists and templates Admin-level	Everything: build, edit, and delete checklist templates; add, edit, reorder, and delete tasks on a transaction; change due dates and task visibility; and mark tasks fully complete — the step an agent-check leaves open.

Good to know: *Fully manage checklists and templates* is an admin permission. Give agents *Assign checklist templates to transactions* so they can add checklists to their own files, but keep full management with your admin staff.

Where a Template's Reach Ends

Only a master admin can set a template to auto-apply across *all* locations, and only admins of the locations a template is set for can change it. Master admins hold every account-wide ability automatically.

Grant a Checklist Permission to a User

Turn a checklist ability on or off for a user, one location at a time, from their profile.

Who Can Do This: A master admin, or a user with the *Create users and locations* permission.

To grant a checklist permission to a user:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users].
3. Search for the user, then click their name (or click the [Gear] and choose [Edit User]).
4. Scroll to the Permissions section and check or uncheck the checklist permission for the appropriate location.
5. Click [Save Settings].

The change takes effect right away for that user in the location you set.

Checklist Permissions FAQ

Two permissions govern checklists, agents can agent-check tasks while only admins complete them, and templates are 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. See Checklist Permissions FAQ.

Ways to Use Checklist Permissions

See Checklist Permissions at work inside a bigger job:

- Give a TC Exactly the Checklist Access They Need