Give a TC Exactly the Checklist Access They Need

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A transaction coordinator lives in your checklists. One permission decides whether they can actually work them.

Introduction

Your TC runs the file. They chase the documents, check the boxes, and keep the deadlines honest, which means they spend more time in your checklists than anyone else in the office.

Getting them there takes two separate things, and it's easy to do only the first. Access puts them on the transactions. A permission decides what they're allowed to do with the checklists once they're there. Grant the wrong one and your TC can see every task and check off none of them.

Only one checklist grant really matters here, and it's set per location — so you can hand a TC full run of the offices they coordinate without opening up anything else in your account.

When to Use This

- You've added a TC and they can see the checklists but can't check anything off.
- Your TC's finished work keeps landing as agent-checked, waiting on an admin who is really them.
- You want a TC running checklists in one office and nowhere else.
- A TC coordinates for several offices and needs different reach in each.
- You want your TC on the tasks but not in your templates.

> Working with a TC from outside your brokerage? Support advises against adding external contacts as internal users. Your agents can forward their daily task reminder emails to them, or email the checklist out from the transaction instead.

1. Get the TC Onto the Transactions First

A checklist permission does nothing until the TC can open the transaction the checklist lives on. Access comes first, and the shape you choose — adding them as a non-admin agent who's designated an assistant per transaction, or giving them a dedicated location with *View all transactions* — sets up everything below.

A TC touches every file in your office but shouldn't own any of them. Three setups, and the one you pick decides what they see.

See Set Up a Transaction Coordinator With the Right Access

2. Decide Which Checklist Grant They Need

Two permissions govern checklists, and the gap between them is the whole article.

- **Assign checklist templates to transactions** — lets the TC put a checklist onto a transaction they can see. It stops there. They can't check tasks off, edit them, or move a due date.
- **Fully manage checklists and templates** — the admin-level grant. The TC can add, edit, reorder, and remove tasks; change due dates and visibility; and mark a task fully complete.

Most TCs need the second one. Without it, everything your TC checks off lands as agent-checked — done on their end, still sitting on an admin's *Tasks* page waiting for approval. If your TC *is* the person who'd approve it, that's a queue that never clears.

Removing a task is admin-only for the same reason. An agent can never take a task off a checklist, however the transaction is set up.

When an agent checks off their own task, Pipeline flags it as agent-checked — done on the agent's end, waiting on an admin's approval.

See Agent Checked Tasks

3. Grant It in Every Location Whose Transactions They Work

Checklist permissions are set per user, per location, so a TC can run checklists in the offices they coordinate and stay hands-off everywhere else.

The location that counts is the transaction's, not the template's. A TC covering three offices needs the grant in all three — even when every checklist they touch came from one template built somewhere else entirely.

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.

See Checklist Permissions

4. Keep Your Templates Out of the Grant

Fully manage checklists and templates is a single switch, and it does what it says. The same grant that lets your TC work tasks also lets them build, edit, and delete checklist templates in that location.

If templates are admin territory at your brokerage, the lever isn't the TC's permission — it's where the templates live. A template only appears on the *Checklists* page for admins who hold the grant in that template's location. Park your templates in a location the TC doesn't have the grant for, and they drop off the TC's *Checklists* page entirely.

Your checklists still reach every transaction. A master admin can set a template to apply automatically to transactions in all locations, and your TC works its tasks normally from inside each file. Where a template lives decides who can edit it — not where it lands.

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates

5. Check What the Grant Still Won't Reach

Two things stay out of reach even with full checklist management, and both catch people out.

- **The Tasks page** — without *View all transactions for this location*, a TC with the checklist grant reaches that office's tasks from inside each transaction rather than from their own *Tasks* page.
- **@mention tasks** — a task set to *@mention* visibility is seen only by the people @mentioned on it and by master admins. No checklist grant opens those. @mention the TC, or the role they hold, on the tasks that are theirs.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility