

# Run Different Checklists for Each Office

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Checklist templates belong to a location. That one field is what lets each office run its own process without stepping on anyone else's.

## Introduction

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Offices aren't interchangeable. A Texas closing doesn't need the Arkansas disclosure, a commercial branch doesn't run the residential list, and the property management side has a checklist nobody else has ever seen.

Pipeline sorts this out with locations. A checklist template belongs to a location, and that decides two things at once: which transactions the template can land on, and which admins can edit it. Set it up once and each office's checklists are genuinely their own.

You don't have to choose between per-office and company-wide. The two run side by side — your compliance checklist can still reach every transaction in the account while each branch runs its own list on top of it.

## When to Use This

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- Your offices are in different states and follow different disclosure rules.
- A branch runs a process the main office doesn't.
- You keep a distinct kind of file — property management, commercial, referrals — that needs its own list.
- Admins in one office are looking at checklist templates that belong to another.

Same process everywhere, just different people doing the work? You may not need to split anything. Task visibility and @mentions route tasks to the right person inside a single checklist — see [Task Visibility](#) under Related Topics.

## 1. Give Each Office Its Own Location

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Locations are what Pipeline segments by, so the split has to exist in your account before your checklists can follow it. Add a location per office — *Office - TX* and *Office - AR* is a real customer's setup — and every transaction created there belongs to that office from the start.

Add a Location to give an office, team, or group its own users, transactions, and permissions.

See [Adding a Location](#)

## 2. Scope Each Template to Its Office

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Every checklist template carries a **Location** field. Point it at the office the checklist belongs to and that template becomes theirs — it reaches their transactions and stays off everyone else's.

This is also what tidies up the *Checklists* page. A template only shows there for admins who hold *Fully manage checklists and templates* in the template's location, so each office's admins see their own templates instead of the whole company's.

Build a new checklist template from scratch — name it, pick the locations that use it, and load it with the tasks a deal depends on.

See [Adding a Checklist Template](#)

### 3. Copy a Template Instead of Rebuilding It

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Offices usually share most of a process and differ on a handful of tasks. Copy the template you already trust, point the copy at the other office, then change only what's different — quicker than starting over, and the shared tasks stay worded the same way across the company.

Building the second office's list from a document instead? **Bulk Add Tasks** takes the whole list pasted at once.

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

See [Checklist Templates](#)

### 4. Decide Which Checklists Cross Office Lines

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Not everything should be per-office. A company-wide compliance list belongs on every transaction, whichever branch opened it.

That's one setting on the template. Left alone, a template assigns itself automatically only to transactions in its own location — which is exactly what keeps a branch's checklists off the main office's files. Turn on **Automatically apply to transactions in all locations** and it goes everywhere. Only a master admin can set it.

A company-wide template doesn't need a company-wide home. Keep it wherever you like: where a template lives decides who can edit it, and the all-locations setting decides where it lands.

Build a new checklist template from scratch — name it, pick the locations that use it, and load it with the tasks a deal depends on.

See [Adding a Checklist Template](#)

### 5. Match Admin Permissions to the Transaction's Location

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Once the checklists are split, the last piece is who can work them. Checklist permissions are per location, and the location that counts is the transaction's — not the template's. An admin can run a checklist built somewhere else entirely, as long as they hold the right permissions where the transaction sits.

They need *View all transactions for this location* to see that office's files, plus *Fully manage checklists and templates* in the same location to edit and check off tasks. Grant a branch manager both in their office and nowhere else, and they run their branch's checklists without ever seeing the rest of the company.

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](#)

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