Checklist Templates

Last Modified on 09/17/2025 4:43 pm EDT

The **checklists** feature lets you keep track of tasks and assign them to particular users. For information about creating and using checklists, please see **Checklists**.

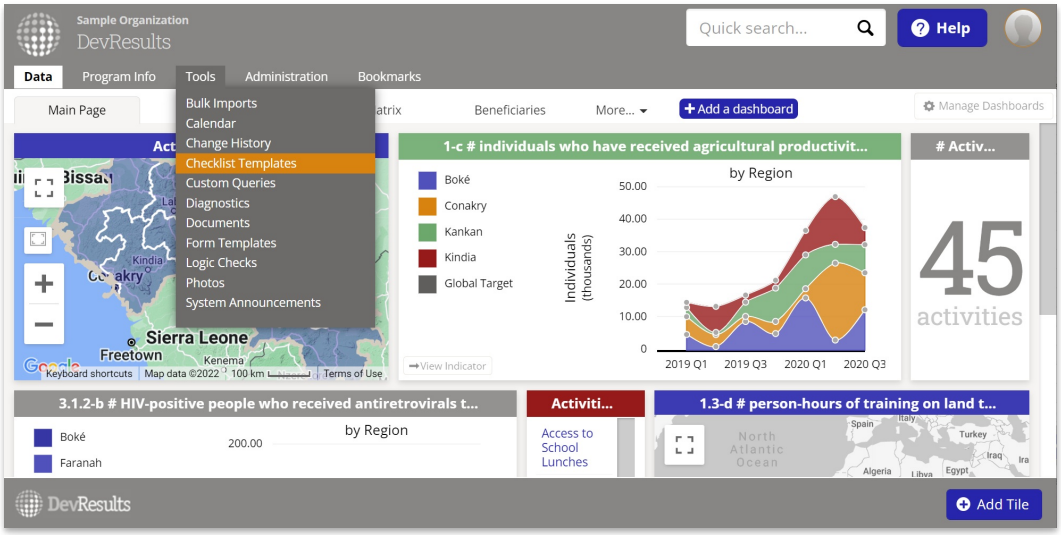
You might have a checklist that you'd like to use multiple times, for multiple projects, or for any sequence of tasks that need to be done frequently or regularly. For this, you can create a checklist template. A checklist template lets you save a single list of tasks, then to add that checklist to any project from a dropdown menu. Then, you can assign due dates for the tasks in the list and assign them to the appropriate users.

There are two ways to create a checklist template:

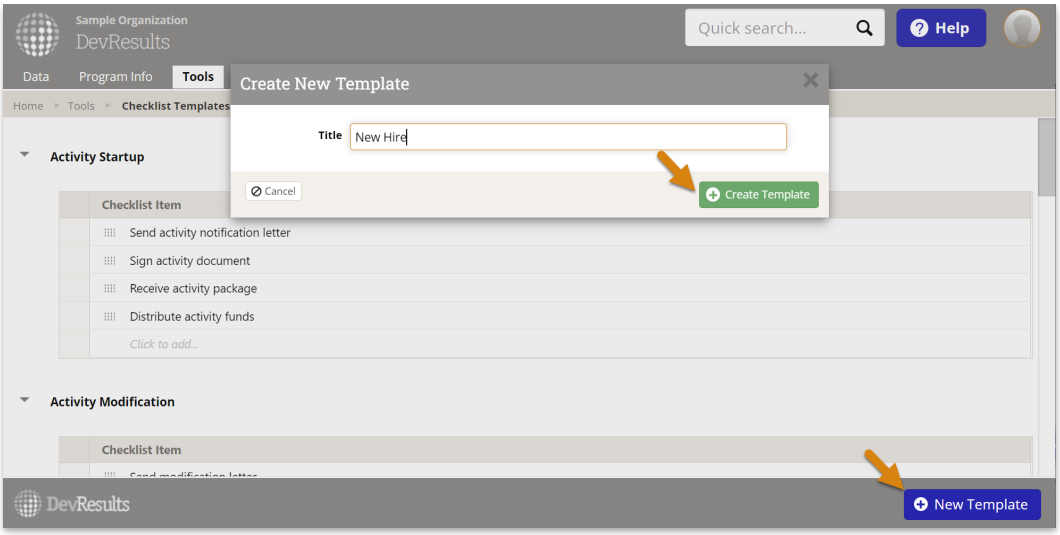
- **Create a template from scratch**
- **Create a template from an existing checklist**

Creating a checklist template from scratch

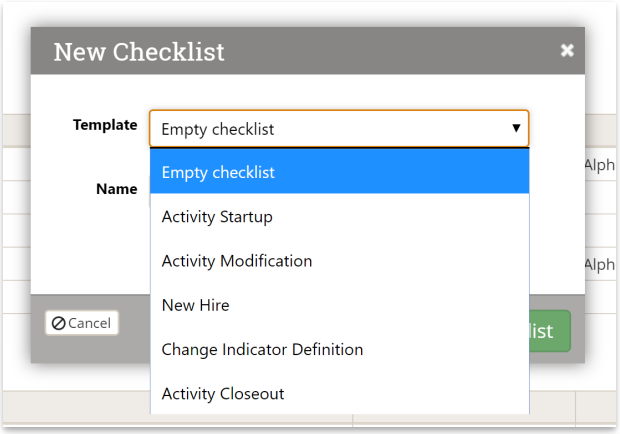
To create a checklist template, go to **Tools > Checklist Templates**.



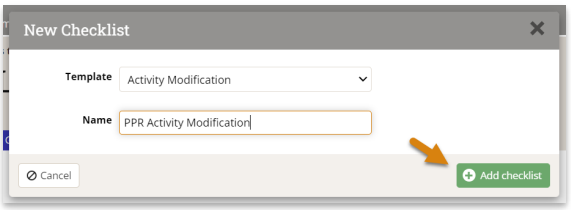
The Checklist Templates page looks similar to the project checklist page, but with fewer available fields. To create a template, click the blue **New Template** button and give your new checklist template a name. After clicking on the green **Create Template** button, type new checklist items or tasks in the "*Click to add...*" field. You can also add a default assignee, if appropriate (if not, just leave that column blank).



Now, when you go to a project checklist tab and create a checklist, you can select your new checklist template from the dropdown menu.



Optionally, you can edit the checklist name from the template default, then click the **Add Checklist** button.

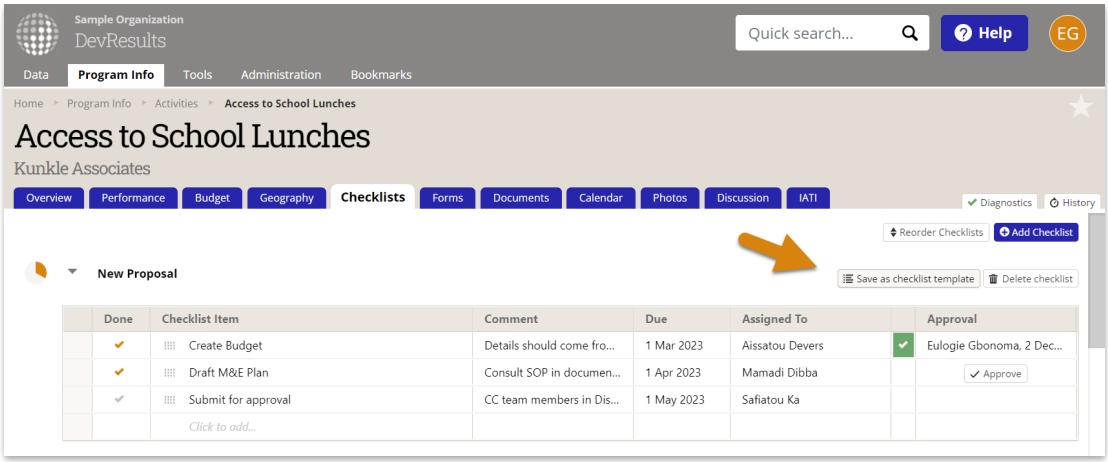


The checklist will be added to the page page. You can then assign users and due dates to each task, just like with any other **checklist**.

Creating a checklist template from an existing checklist

Alternatively, you can convert an existing checklist into a checklist template. Once you've found the project checklist you'd like to use as a template, hover over the checklist.

Click the **Save as checklist template** button that appears in the upper right. This will copy the checklist name and checklist items to the checklist templates page. You can then go to **Tools > Checklist Templates** to make any further refinements.



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