Set Up The Pipeline Checklist

This article applies to:

Max Classic

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When a sales rep moves a stage in an opportunity record, it can initiate automation. However, there may be specific goals, tasks, or talk topics related to each specific stage. The sales rep must be aware of or complete these items, but they do not represent a significant milestone in the sales process.

You can assign a checklist to each sales stage to help sales reps track their "to-dos" and to require reps to complete certain tasks before moving the stage. Note: Checklists are NOT triggers (they do not initiate automation) and are not available as criteria in searches and reports.

1. Go to **CRM > Settings** in the main navigation menu
2. Click on **Sales Pipeline** in the settings menu
3. Click on the **Checklist** link beside a stage to create a new checklist or edit an existing one.
4. Add items to the checklist.
    - **Description**: The description shows up in the opportunity record when the stage it's assigned to is selected from the stage drop-down.
    - (Optional) **Required**: Mark this checkbox for required tasks / goals. The sales rep will not be able to move the sales stage until they mark all required items as completed. Skip this for recommended or optional items.**Order**: This number is used to set up the list order for the checklist within the stage. Increment by multiples of 10 at first, so that you can insert new checklist items between the existing items later.
5. Click on the **Add** button to save the checklist item.
6. Repeat this process to add additional checklist items for this sales stage.
7. Close the pop-up window.

    Repeat this process to add additional checklist for additional sales stages.