Tasks List Page

Access & View Your Tasks List

Your Tasks List on the Tasks Page is your go-to space for managing overdue and upcoming tasks across all transactions, keeping you organized and on top of deadlines.

Learn more →

Personalize Your Tasks List View

Your Tasks List prioritizes tasks by due dates across transactions and offers a customizable view for efficient, personalized management.

Learn more →

Sort & Search Tasks

Quickly find tasks using the sort, search, and filter options on the Tasks Page.

Learn more →

Save Task Shortcuts

Save custom sorts and searches for quick access to tasks you need frequently.

Learn more →

Sync Tasks to Your Calendar App

Sync your Paperless Pipeline tasks with Google Calendar, iCal, or Outlook to seamlessly integrate transaction activities into your daily schedule.

Learn more →

Complete Tasks

Admins complete tasks themselves or verify and complete tasks marked by agents. This updates the Checklist Completion Status to reflect accurate transaction progress.

Learn more →