

# Setting Up Checklists & Tasks

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Introduction

Set Up Checklist Templates

**Add Checklist Templates**

[Learn more →](#)

**Set Checklist Templates to Automatically Apply**

[Learn more →](#)

**Optimize Tasks**

**Add Tasks to Match Your Standard Doc Names**

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**@Mention People or Groups**

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**Add Relative Due Dates**

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**Set Task Visibility Type**

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**Designate Key Date Tasks**

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**Allow Agents to Edit Tasks**

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Grant User Permissions

**Grant Agent Permissions**

**Grant Admin Permissions**

**Other Related Settings**

**Add & Manage Business Holidays**

**Set Preferred Checklist Settings**

**Send Daily Task Reminder Emails**

**Use Checklists**

**Use Checklists on Transactions**

**Train Your Team to Use Checklists**