Smart Task-Doc Matching

Smart Task-Doc Matching dynamically links tasks and documents by their names, so when you're working on transactions, you can click a document to highlight matching tasks or hover over a task to highlight matching documents.

Introduction

Use Smart Task-Doc Matching to readily identify checklist tasks corresponding to docs and vice versa.

If a task on the transaction matches (contains) the document name, the task will be highlighted on the checklist.

If a document on the transaction matches (is contained in) the task name, the document will be highlighted in the list of documents.

How It Works

Smart Task-Doc Matching automatically links matching tasks and docs on transactions so that agents and admins can easily:

- **Highlight a Doc's Matching Task:** If a task's name matches or contains the document's name in the transaction, the corresponding task will be highlighted on the checklist. This ensures that tasks related to specific documents are easily identifiable and managed.
- **Highlight a Task's Matching Doc:** Conversely, if a document's name matches or is contained within a task's name in the transaction, the document will be highlighted in the list of documents. This feature helps users quickly locate relevant documents associated with specific tasks.

Smart Task-Doc Matching simplifies transaction management by dynamically linking tasks and docs based on their names, thereby enhancing efficiency and accuracy in handling docs and completing tasks.

Set Up Matching Task & Doc Names

Set up Matching Task and Doc Names to support Smart Task-Doc Matching on transactions.

Who Can Do This: Admins with permission to *Fully manage checklists and templates.*

To support Smart Task-Doc Matching on transactions:

Go To Doc Names :

- Click your name in the upper right corner, then [Admin / Settings].
- Select [Document Names] from the *Customize* section of the left menu.

Add Doc Names:

- Add Standardized Doc Names.

  Learn how to Add Doc Names →

Go to Checklist Templates :

- Click your name in the upper right corner, then [Admin / Settings].
- Select [Checklists] from the *Templates* section of the left menu.

Open Template:

- Either add a new Checklist Template or edit an existing one.

  Learn how to Add & Edit Checklist Templates →

Add Matching Tasks:

- Add tasks that match (contain) your Standardized Doc Names.

Use Smart Task-Doc Matching

Highlight Docs That Match Tasks

When reviewing completed tasks on a transaction, you can quickly identify the doc that corresponds to that completed task.

If the name of a doc on the transaction matches (is contained in) the name of the hovered-over task, the doc will be highlighted in the list of documents.

For example, hovering over the task named Listing Agreement below will result in the Listing Agreement doc being highlighted.

In order for the highlight to occur, the document's name must appear completely inside the task's name. We recommend using Pipeline's standardized document names feature to help ensure better matching of tasks to docs.

Highlight Tasks that Match Docs

When you're viewing documents on a transaction, you can quickly locate the corresponding task that needs to be checked off.

If the name of a task on the transaction matches (contains) the name of the selected doc, the task will be highlighted on the checklist.

For example, clicking the document named Seller's Disclosure below will result in the Seller's Disclosure task being highlighted.

In order for the highlight to occur, the document's name must appear completely inside the task's name. We recommend using Pipeline’s standardized document names feature to help ensure better matching of docs to tasks.