Key Date Tasks

Key Dates are important tasks in transactions that can be displayed on coversheets, synced to calendar apps, and autofilled into messages for easy tracking and communication.

Introduction

Key Dates are tasks that can be highlighted in the Checklists area on transactions. Key Dates are highlighted to show their importance, ensuring that critical transaction milestones are easily tracked and communicated.

Key Dates can be displayed on your company's transaction coversheets, synced to agents' and admins' calendar apps, and autofilled into messages.

Designating tasks as Key Dates allows you to:

- Include a timeline of Key Dates on transaction coversheets.
- Smartly sync only Key Dates to your calendar app.
- Easily insert a transaction’s Key Dates into emails using a simple autofill tag.

Designate a Key Date Task

Designate a Key Date Task as an important timeline date on your transaction coversheets, synced to your calendar app, and autofilled into emails and message templates.

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

To designate a new Key Date task:

Open Template:

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

  Learn how to Add & Edit Checklist Templates →

Designate Key Date:

- Click the [key] next to the task.

Save:

- Click [Save Template] to save the template.

Use Key Dates in Coversheets

Train Your Team to Use Key Dates

Sync Key Dates to Your Calendar

Autofill Key Dates into Messages