Agent-editable Due Dates

Agent-editable Due Dates allow agents to adjust the due dates of their tasks within the checklist, providing flexibility to accommodate changes in the transaction timeline.

Introduction

Managing a transaction's workflow efficiently requires setting due dates for tasks. To enhance flexibility, agents can be granted the ability to edit certain task due dates directly within their transactions.

Allowing agents to adjust due dates based on specific requirements and timelines is particularly beneficial when compliance-based deadlines are not applicable. By giving agents this control, they can ensure that due dates are more appropriate and relevant, resulting in a more adaptable and efficient task management process.

Allow Agents to Change a Task's Due Date

Designate an agent-editable task due date to allow agents to set or modify due dates according to their transaction needs.

Who Can Do This: Admins with *Fully manage checklists and tasks* permission can designate agent-editable task due dates.

To designate an agent-editable task due date:

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 →

Enter the task into the list of *Document Names or Tasks to Track.*

- To add more tasks, click [+ Add more tasks].
- To add a list of tasks in bulk, click [+Bulk add tasks] then paste or type your list and [Add Tasks].

Select [person] to allow agents to change the due date for the task once it's added to transactions.

Click [Save Template].

Train Agents to Change Due Dates