Transaction Checklist Personalization

Checklists act as your calendar on transactions, providing an overview of all tasks, which you can adjust to personalize the display.

Introduction

On transactions, checklists are your transaction-specific calendar. They provide a clear overview of all tasks that need to be completed for a transaction, along with any designated due dates, and displayed in the order set by your admin(s).

Optionally, you can personalize your view by sorting tasks by due date and hiding @mention text. Pipeline remembers your preferences, so you can pick up where you left off when you return. This lefts you adapt checklists on transactions to your needs, ensuring you see tasks in the best way for your workflow.

Access & View Checklists on a Transaction

View the Checklists area to track and manage a transaction's tasks.

Who Can Do This: Anyone who has access to view a transaction can view tasks set to a Task Visibility they have access to view.

To access a transaction's Checklist area:

1. **Go to a Transaction**:
    - Navigate to the transaction where you want to view checklists & tasks. Here's how to Access & View Transactions →
2. **View Checklists**:
    - **View the name of each checklist** above its tasks, at the top of its respective list.
        - Checklists applied to the transaction are displayed in the left menu.
        - Checklists are displayed in the order set by your admin.
3. **View Tasks**:
    - **View tasks currently applied to the transaction** within each checklist.
        - Tasks are displayed in the order set by your admin, by default.

- **View due dates**, color-coded based on when the task is due:
    - Overdue tasks are red.
    - Tasks due today are orange.
    - Tasks due tomorrow are yellow.
    - Tasks due in the future (after tomorrow) are gray.
- **Highlight docs related to tasks**: Hover over the task to highlight the related doc when a task contains the name of a doc uploaded to a transaction.

4 **Use Checklists & Tasks**:

- Use the Checklists area to keep track of what needs to get done and get things done (described below).

Completion Status

View the transaction's current *Checklist Completion Status*.

By default, Checklist Completion Status is displayed as a ratio. Optionally, you can show Checklist Completion as a Percentage.

@Mention

@Mention tasks...

Learn more about @Mention →

Key Dates

Key Date tasks...

Learn more about Key Dates →

Visibility

Visibility Type...

Learn more about Visibility Type →

Show Checklist Completion Percentage or Ratio

> Choose your preference for viewing the Checklist Completion Status on transactions, either as a percentage or ratio.

> **Who Can Do This**: Anyone with access to view a transaction will see any tasks set to a Visibility Type they have access to view.

To show checklist completion as a percentage or as a ratio:

1. **Go to a Transaction's Checklists Area**:
    - Here's how to Access Checklists on Transactions →
2. **Toggle Completion Status**:
    - Click the Checklist Completion Status to toggle between [Percentage ✔] or [Ratio ✔].
    - Pipeline will remember your preference to show the Checklist Completion Status as a percentage or ratio whenever you return to the transaction later.

Turn On / Off Checklist Scrolling

> Choose your preference for Checklist Scrolling: enable it to scroll through checklists independently from the main View Transaction Page, or disable it to scroll through the entire page together.

> **Who Can Do This?** Anyone can turn Checklist Scrolling on or off for their personal view of transactions.

To turn Checklist Scrolling on or off:

1. **Go to a Transaction's Checklists Area**:
    - Here's how to Access Checklists on Transactions →
2. **Access Checklists Menu**:
    - Click [⋮] from the top of the Checklist Area.
3. **Set Your Preference**:
    - Check the box next to [Checklist Scrolling] to turn it on.
    - Uncheck to turn it off.
4. **Save Your Preference**:

- Click [Done].
- Pipeline will remember your preference to turn checklist scrolling on or off whenever you return to the transaction later.

Sort Tasks by Due Date

Sort tasks by due date to view them in chronological order within their checklists; by default, tasks appear in the original order set by an admin.

Who Can Do This? Anyone can sort tasks their personal view of tasks by date.

To sort tasks by due date:

1. **Go to a Transaction's Checklists Area**:
    - Here's how to Access Checklists on Transactions →
2. **Access Checklists Menu**:
    - Click [⋮] from the top of the Checklist Area.
3. **Set Your Preference**:
    - Check the box next to [Sort by Date] to display tasks in order by due date.
        - Uncheck to return to the task order set by an admin.
4. **Save Your Preference**:
    - Click [Done].
    - Pipeline will remember your sort preference whenever you return to the transaction later.

Hide @Mention Text

Hide @mention text to reduce clutter in your checklists and make tasks easier to read, and Pipeline will remember your preference when you return.

Who Can Do This? Anyone can show or hide @mention text from their personal view of tasks.

To hide @mention text in tasks:

1. **Go to a Transaction's Checklists Area**:
   - Here's how to Access Checklists on Transactions →
2. **Set Your Preference**:
   - Click [⋮] from the top of the Checklist Area.
   - Check the box next to [Hide @Mention] to hide @Mention Names in the Checklists Area..
     - Uncheck to show @Mention.
3. **Save Your Preference**:
   - Click [Done].
   - Pipeline will remember your preference to hide or show @mentions whenever you return to the transaction later.