# **Task Syncing**

Sync your Paperless Pipeline tasks with Google Calendar, iCal, or Outlook to seamlessly integrate transaction activities into your daily schedule.

## Introduction

Keep track of your Paperless Pipeline tasks in your preferred calendar app, such as Google Calendar, iCal, or Outlook, by syncing tasks from the Tasks Page .

Syncing your tasks to your calendar lets you seamlessly integrate transaction activities into your daily schedule, helping you stay organized and up-to-date effortlessly.

## How It Works

#### You're in Control

- Sync All Tasks: Sync all your tasks to your calendar for a comprehensive task management approach.
- **Sync Selectively:** Use the search and filter options on the Tasks Page to selectively sync only the tasks that matter most to you.

#### Types of Tasks to Sync

- Key Dates: Ensure you don't miss important deadlines by syncing key dates directly to your calendar.
- Agent-checked Tasks: Receive reminders only after agents have checked them off, providing a streamlined workflow.
- **@Mentions:** Stay updated on tasks where you're specifically mentioned, ensuring you never miss important updates.

#### **After Syncing**

- Automatic Updates: Once tasks are synced, any changes made in Paperless Pipeline are automatically updated in your calendar app. This includes new tasks, completed tasks, and changes to task details.
- **Calendar Events:** Synced tasks appear as all-day events in your calendar app, with details such as due date, transaction name, and a link to the transaction in Paperless Pipeline.
- **Reminders:** You can use your calendar app's notification settings to receive notifications and reminders for upcoming tasks.

- **Seamless Integration:** Tasks integrated into your calendar can be managed alongside other calendar events, helping you maintain a holistic view of your schedule.
- Access Across Devices: Synced tasks are accessible on any device where you use your calendar app, ensuring you stay organized whether you're on your computer, tablet, or smartphone.

## Sync All Tasks Due

Sync all your Paperless Pipeline tasks to your preferred calendar app for comprehensive task management.

Who Can Do This: Anyone can sync all their tasks with Google Calendar, iCal, or Outlook.

To sync all your tasks with Google Calendar, iCal, or Outlook:



• Click [Tasks] from the top menu.



• Click your preferred calendar link at the top of the page.

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#### 3 Confirm Sync:

• When prompted by your calendar app, confirm you want to add or subscribe to the Paperless Pipeline calendar.

#### 4 Stay Updated:

• Once confirmed, your tasks will be displayed in your calendar.

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• Open a calender entry to view the task's Transaction Name or Property Address, along with a link to view the transaction in Paperless Pipeline.

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# Sync Specific Tasks Only

Sync specific tasks to your preferred calendar app for targeted task management.

Who Can Do This: Anyone can sync specific tasks with Google Calendar, iCal, or Outlook.

To sync only specific tasks with Google Calendar, iCal, or Outlook:

#### **1** Go to the Tasks Page :

• Click [Tasks] from the top menu.

#### 2 Search & Filter Tasks:

Search and / or filter for the specific tasks you want to sync to your calendar app.
 Learn more about Task Searching & Filtering →

#### 3 Select Your Calendar:

• Click your preferred calendar link at the top of the page.

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• When prompted by your calendar app, confirm you want to add or subscribe to the Paperless Pipeline calendar.

#### 5 Stay Updated:

• Once confirmed, your tasks will be displayed in your calendar.

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• Open a calender entry to view the task's Transaction Name or Property Address, along with a link to view the transaction in Paperless Pipeline.

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# Unsync Tasks

Unsync or unsubscribe previously synced Paperless Pipeline tasks directly from your calendar app.

**Who Can Do This**: Anyone who previously synced tasks to their calendar can unsync or unsubscribe from Paperless Pipeline tasks within their calendar app.

### **Google Calendar**

To learn how to delete or unsubscribe from a calendar in Google Calendar, check out this Google Support article.

iCal

For instructions on how to unsubscribe from a calendar subscription in iCal, read this Apple Support article.

Outlook

For guidance on deleting a calendar in Outlook, refer to this Outlook Support article.