Understanding Checklists & Tasks (for Agents)

Paperless Pipeline's Checklists and Tasks keep agents and admins organized and compliant during transactions. Using Checklists and Tasks, agents and admins stay on the same page, ensuring every step is accounted for and completed efficiently.

Introduction

Checklists are Paperless Pipeline's way of tracking Tasks that need to be completed on a transaction. They are a vital tool for helping both admins and agents stay compliant and organized.

Using Checklists and Tasks, agents and admins stay on the same page, ensuring every step is accounted for and completed efficiently.

How It Works

Checklist Templates

Admins can create Checklist Templates to track tasks representing all the actions needed to complete a transaction, such as getting documents signed, entering crucial information, and following up with contacts.

Automatically Applying Checklists

Checklists can be added to transactions automatically based on predefined rules, typically segmented by Status, Side, and Label:

- **Status**: The stage of the transaction, such as Listing, Pending, or Closed.
- **Side**: The representation in the transaction, such as Buyer or Seller.
- **Label**: The type of transaction, such as Commercial, Residential, or Lot.

For example:

- When a transaction is in Listing status, and the office represents the Seller, add the "Seller Listing" checklist.
- When the status is Pending, and the office represents the Buyer, add the "Buyer Pending" checklist.
- When the transaction’s Label is Commercial, and the status is Listing, add the "Commercial Listing" checklist.

These automatic rules ensure that the appropriate checklist is applied to each transaction, streamlining the workflow and ensuring all necessary tasks are tracked.

Once added to transactions, admins can customize checklists and tasks for individual transactions, allowing for flexibility and adaptation to different transaction types. Agents can update due dates when admins allow it for specific tasks, further enhancing the adaptability of the Checklists.

Checklists on Transactions

Daily Task Reminder Emails

The Tasks List Page

Task Fulfillment

Task Completion

Use Checklists on Transactions

Use the Tasks List Page