Using Checklists & Tasks (for Agents)

Using Checklists and Tasks

Introduction

Checklists on Transactions

Access & View Checklists on Transactions

Add & Manage Checklists on Transactions

Personalize Checklists on Transactions

Fulfill Tasks (for Agents)

Complete Tasks (for Admins)

The Tasks Page

Personalize Your Tasks List View

Your Tasks List prioritizes tasks by due dates across transactions and offers a customizable view for efficient, personalized management.

Learn more →

Sort & Search Tasks

Quickly find tasks using the sort, search, and filter options on the Tasks Page.

Learn more →

Save Task Shortcuts

Save custom sorts and searches for quick access to tasks you need frequently.

Learn more →

Sync Tasks to Your Calendar App

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

Learn more →

Complete Tasks

Admins complete tasks themselves or verify and complete tasks marked by agents. This updates the Checklist Completion Status to reflect accurate transaction progress.

Learn more →

Daily Task Reminder Emails

The Daily Task Reminder Email updates you each morning on your overdue, current, and upcoming tasks, providing a clear and prioritized view with quick links to log into Paperless Pipeline and take action.

Learn more →