Checklists on Transactions

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 Checklists on Transactions

Access checklists on transactions to track and manage your overdue and upcoming tasks across all transactions.

Who Can Do This? Anyone can access their overdue and upcoming tasks on the Tasks Page.

To access your Tasks List:

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 & Use Checklists Area**:
   - View and use the task details to keep track of what needs to get done and get things done.

View your Tasks List to track and manage your overdue and upcoming tasks across all transactions.

Who Can Do This? Anyone can access their overdue and upcoming tasks on the Tasks Page.

To view checklists on a transaction:

1. **Access Checklists Area.**

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 →

Use Checklists on Transactions

Access & View Checklists on Transactions

Personalize Your View of Checklists

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

Learn more →

Add & Manage Checklists on Transactions

Learn more →

Mark Tasks as Done or N/A (Agent Task Fulfillment)

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

Learn more →

Complete Tasks (Admin Task Completion)

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

Learn more →