

Manage Checklists on Transactions

SUMMARY

Learn how to manage and view checklists and tasks on transactions.

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Introduction

Checklists help admins and agents stay in compliance by tracking tasks that need to be completed on a transaction. *Tasks* are items on a checklist that represent documents or actions that need to

be uploaded or completed.

Checklist Templates are set up by an admin for use across the company's transactions. Once a *Checklist Template* is set up, it can be added to transactions manually or, preferably, automatically based on rules defined by an admin.

Once a checklist has been added to a transaction, it can be refined and altered to be specific to the transaction it was added to (and will not impact the template it was based on).

Agents and admins may check off tasks on transactions to track and communicate the status of each task. Tasks can only be checked as fully completed by admins, while agents can mark tasks as done (*Agent-checked*) or not applicable (N/A) to indicate they're ready for an admin's review.

Here is an example of a typical task office's task workflow:

- An agent marks a task as either done  (*Agent-checked*) or Not Applicable  (N/A).
- An admin [filters for Agent-Checked tasks on the Tasks page](#) to review tasks marked as done or not applicable.
- From the *Tasks Page* or while viewing a transaction, an admin checks a task to mark it as completed  or un-marks the agent's check if they feel the task hasn't been fulfilled.

Once an admin checks a task, the task is considered fully complete and will update the transaction's *Checklist Completion Status*.

Manage Transaction Checklists

[Add a Checklist ?](#)

Who can do this? Agents and admins with permission to *Assign checklist templates to transactions*.

When a checklist isn't [auto-assigned](#) to a transaction, it can be added manually.

 **3:18**

To manually add a checklist to a transaction:

- 1 From the transaction's *Checklists* area, **click [?]**.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

234 Arrow Road Added on Feb 3, 2022 by Hollis Holcomb
Last updated just now by Hollis Holcomb

Email docs and notes to this transaction: 4562059-111861-TX-2753@docs.paperlesspipeline.com

General

Status: Pending
MLS #: 985674563
Side: Listing
Location: Paperless Real Estate

Buyer & Seller

Seller: G. Smith
Buyer: B. Simpson

Sale & Commission

List Price: \$356,000
Sale Price: \$350,000

Contingency Dates

Earnest Money Deposit Date: Jan 4, 2022

More Info

Lockbox - 456789

Listing Agents

Betty Stone hollis+tcbstone@paperlesspipeline.com

Checklists + 72% ✓

— Pending

- ☐ Cooperating broker's commission agreement
- ☐ Commission disbursement authorization
- ☐ Extension of closing addendum (if applicable)
- ☐ Repair addendum (if applicable)
- ☐ Buyer Preapproval
- ☒ Show completed tasks →

Add doc name or task

+ Listing

- 2 Select the desired checklist from the dropdown list. Your selected checklist will be added to the transaction.

The best way for checklists to be added to transactions is for an admin to set the Checklist Template to be automatically added based on a transaction's Status, Label, and/or Side. [Learn how to Automatically Assign Checklist Templates to Transactions →](#)

Edit a Checklist Title

Who can do this? Admins with permission to *Fully manage checklists and templates.*

To edit the title of a checklist:

- 1 From the transaction's *Checklists* area, **hover over the checklist and click the [pencil].**

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

234 Arrow Road Added on Feb 3, 2022 by Hollis Holcomb
Last updated Feb 8, 2022 by Hollis Holcomb

Email docs and notes to this transaction: 4562059-111861-TX-2753@docs.paperlesspipeline.com

General

Status: Pending **Liste**
MLS #: 985674563 **Acci**
Side: Listing **Clos**
Location: Paperless Real Estate

Buyer & Seller

Seller: G. Smith
Buyer: B. Simpson

Sale & Commission

List Price: \$356,000
Sale Price: \$350,000

Contingency Dates

Earnest Money Deposit Date: Jan 4, 2022

More Info

Lockbox - 456789

Listing Agents

Betty Stone hollis+tcystone@paperlesspipelin

Checklists 72% ✓

☒ Pending

☐ Cooperating broker's commission agreement 2/1

☐ Commission disbursement authorization 2/10

☐ Extension of closing addendum (if applicable)

☐ Repair addendum (if applicable)

☐ Buyer Preapproval 2/11

☒ Show completed tasks →

Add doc name or task

+ Listing

- 2 Update the **Checklist Title**.
- 3 Click [Save] to update the title.

Reorder Checklists

Who can do this? Admins with permission to *Fully manage checklists and templates*.

To reorder checklists on a transaction:

- 1 From the transaction's **Checklists** area, **click and hold the Title** of a checklist, then drag it to your desired position in the **Checklists** area.

[View Transaction](#)
[Edit Transaction](#)
[Upload Docs](#)
[Assign Docs](#)
[Transaction History](#)
[Deleted Docs](#)
[Received Emails \(0\)](#)
[Download Transaction](#)

813 Briarcliff

Added on Apr 27, 2020 by Hollis Holcomb
 Last updated 1 minute ago by Hollis Holcomb

Email docs and notes to this transaction: 4568202-111443-TX-2055@docs.paperlesspipeline.com

General

Status: Listed
 MLS #: 04270247
 Label: Residential
 Side: Listing & Buying
 Location: Old Pine

Listed On: Apr 1, 2020
 Accepted On: Apr 8, 2020
 Closed On: May 31, 2020

Seller & Buyer

Sale & Commission

Sale Price: \$500,000
 Total Commission: \$200,000

More Info

Lock Box

Admin Info (only visible to admin staff)

Some default admin info...

Listing Agents

Kristian Keane
kristiankeane@gmail.com
 456-456-5555
 987-654-3210

Carlisle Lilly
carlisle@paperlesspipeline.com

Buying Agents

Kristian Agent
carol+agent@paperlesspipeline.com
 567-567-5678

Rosemary Laucala
rosemarylaucala@paperlesspipeline.com
 555-555-5555

5 Contacts

Monta Cupcake, Referrer
monta+cupcake@paperlesspipeline.com
 2225552222

Cupcake Central

April is a regular at Cupcake Central. When they learned she wanted to move, they referred her to us!

Odysseus Davis, Property Inspector
hollis+odie@paperlesspipeline.com
 (237) 912-2639

Odie's Property Inspection Company / 717 Main Street

Checklists 0% ✓

Listing checklist

- ☐ Seller's Property Disclosure 4/22
- ☐ Lead-based Paint Disclosure (if applicable) 4/29
- ☐ Well water Disclosure 5/26
- ☐ Lockbox Keys 6/1
- ☐ Listing Agreement 4/14
- ☐ Mold Disclosure 5/10
- ☐ MLS Information 4/22
- ☐ Agency Disclosure 5/4
- ☐ Financial Addendum

Add doc name or task

Pending checklist

- ☐ Executed Counter
- ☐ Purchase contract
- ☐ Preliminary title report
- ☐ Agency disclosure
- ☐ Pre-Approval (if financing involved)
- ☐ Conditional loan approval (if financing involved)
- ☐ Fully signed seller's property disclosure
- ☐ Home inspection signoff
- ☐ Final walk through signoff

Add doc name or task

Delete a Checklist

Who can do this? Admins with permission to *Fully manage checklists and templates*.

To delete a checklist on a transaction:

- From the transaction's *Checklists* area, **hover over the checklist** and **click the [X]** that appears to the right.

[View Transaction](#)
[Edit Transaction](#)
[Upload Docs](#)
[Assign Docs](#)
[New Offer](#)
[Transaction History](#)
[Received Emails \(0\)](#)
[Download Transaction](#)

234 Arrow Road

Added on Feb 3, 2022 by Hollis Holcomb
 Last updated Feb 8, 2022 by Hollis Holcomb

Email docs and notes to this transaction: 4562059-111861-TX-2753@docs.paperlesspipeline.com

General

Status: Pending
 MLS #: 985674563
 Side: Listing
 Location: Paperless Real Estate

Buyer & Seller

Seller: G. Smith
 Buyer: B. Simpson

Sale & Commission

List Price: \$356,000
 Sale Price: \$350,000

Contingency Dates

Earnest Money Deposit Date: Jan 4, 2022

More Info

Lockbox - 456789

Listing Agents

Betty Stone
hollis+tcbstone@paperlesspipeline.com

Checklists 72% ✓

Pending

- ☐ Cooperating broker's commission agreement 2/1
- ☐ Commission disbursement authorization 2/10
- ☐ Extension of closing addendum (if applicable)
- ☐ Repair addendum (if applicable) 2/11
- ☐ Buyer Preapproval 2/11

Show completed tasks →

Add doc name or task

+ Listing

- 2 Click [delete] to confirm. The checklist will be deleted from the transaction.

Deleting a checklist from a transaction will only delete the checklist from that particular transaction and will not impact the *Checklist Template*.

Manage Transaction Tasks

Add a Task

Who can do this? Admins with permission to *Fully manage checklists and templates*.

To add a new task to a checklist:

- 1 From the bottom of your desired checklist in the transaction's *Checklists* area, click [Add Doc Name or Task].

The screenshot shows the Paperless Pipeline interface for a transaction titled "234 Arrow Road". The left sidebar contains a menu with options like "View Transaction", "Edit Transaction", "Upload Docs", "Assign Docs", "New Offer", "Transaction History", "Received Emails (0)", and "Download Transaction". The "Checklists" section is expanded, showing a list of tasks with checkboxes and progress indicators. A red box highlights the "Add doc name or task" button at the bottom of the checklist, with a red arrow pointing to it. The right sidebar displays transaction details, including "General" (Status: Pending, MLS #: 985674563, Side: Listing, Location: Paperless Real Estate), "Buyer & Seller" (Seller: G. Smith, Buyer: B. Simpson), "Sale & Commission" (List Price: \$356,000, Sale Price: \$350,000), "Contingency Dates" (Earnest Money Deposit Date: Jan 4, 2022), "More Info" (Lockbox - 456789), and "Listing Agents" (Betty Stone).

- 2 Type the *Task Name*.
- 3 Click [Save] to add the new task.

You can add URL links to tasks. Links added to tasks are clickable and will open in a new

window.

Edit a Task's Name

Who can do this? Admins with permission to *Fully manage checklists and templates*.

To edit the name of a task:

- 1 From the transaction's *Checklists* area, **hover over your desired task**, and click the [pencil].

The screenshot shows the 'Checklists' section for a transaction titled '234 Arrow Road'. The left sidebar contains a list of actions: View Transaction, Edit Transaction, Upload Docs, Assign Docs, New Offer, Transaction History, Received Emails (0), and Download Transaction. The 'Checklists' section is expanded, showing a list of tasks with checkboxes and progress indicators. A red arrow points to the pencil icon next to the 'Buyer Preapproval' task, which is currently marked as '2/11'. The right sidebar displays transaction details: General (Status: Pending, MLS #: 985674563, Side: Listing, Location: Paperless Real Estate), Buyer & Seller (Seller: G. Smith, Buyer: B. Simpson), Sale & Commission (List Price: \$356,000, Sale Price: \$350,000), Contingency Dates (Earnest Money Deposit Date: Jan 4, 2022), and Listing Agents (Betty Stone, hollis+tcstone@paperlesspipeline.com).

- 2 Type the updated *Task Name*.
- 3 Click [Save] to update the task.

Edit a Task's Visibility

Who can do this? Admins with permission to *Fully manage checklists and templates*.

To change who will have access to view and receive reminders about a task:

- 1 From the transaction's *Checklists* area, **hover over the task** and click the [eye].

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

234 Arrow Road Added on Feb 3, 2022 by Hollis Holcomb
Last updated Feb 8, 2022 by Hollis Holcomb

Email docs and notes to this transaction: 4562059-111861-TX-2753@docs.paperlesspipeline.com

General

Status: Pending
MLS #: 985674563
Side: Listing
Location: Paperless Real Estate

Buyer & Seller

Seller: G. Smith
Buyer: B. Simpson

Sale & Commission

List Price: \$356,000
Sale Price: \$350,000

Contingency Dates

Earnest Money Deposit Date: Jan 4, 2022

More Info

Lockbox - 456789

Listing Agents

Betty Stone hollis+tcbstone@paperlesspipeline.com

Checklists 72% ✓

Pending

- ☐ Cooperating broker's commission agreement 2/1
- ☐ Commission disbursement authorization 2/10
- ☐ Extension of closing addendum (if applicable)
- ☐ Repair addendum (if applicable)
- ☐ Buyer Preapproval 2/11
- ☒ Show completed tasks →

Add doc name or task

+ Listing

- 2 Select the appropriate **Task Visibility** option. [Learn more about Visibility Types →](#)
- 3 Click [Set Task Visibility]. Now, only those that have access to the **Visibility Type** you selected will be able to view the task.

The best way to set **Task Visibility** for a task is to set it on the **Checklist Template**. That way, every time the template is used to add a checklist to a transaction, its tasks will already have their visibility set. [Learn how to Set Task Visibility on Checklist Templates →](#)

Edit a Task's Due Date

Who can do this?

- Admins with permission to **Fully manage checklists and templates**
- Agents can edit the due date of tasks set to **Allow Agents to Change a Task's Due Date**

Due dates can be added to tasks as an **Absolute Due Date** - like Tuesday April 12th - or a **Relative Due Date**, which is a due date relative to certain trigger activities.

To set a task's due date:

- 1 From the transaction's **Checklists** area, **click the task's due date**. Or, if a date hasn't been assigned to the task, **hover over the task and click the [calendar]**.

2 From the pop-up, you can either assign a specific *Absolute Date* or a *Relative Due Date*:

- View Transaction**

Edit Transaction

Upload Docs

Assign Docs

New Offer

Transaction History

Received Emails (0)

Download Transaction

234 Arrow Road

Added on Feb 3, 2022 by Hollis Holcomb
Last updated just now by Hollis Holcomb

Email docs and notes to this transaction: 4562059-111861-TX-2753@docs.paperlesspipeline.com

General

Status: Pending

MLS #: 985674563

Side: Listing

Location: Paperless Real Estate

Liste

Acco

Clos

Checklists 72% ✓

 - ☐ Pending
 - ☐ Cooperating broker's commission agreement 2/6
 - ☒ Commission disbursement authorization 2/6

Absolute Date

Relative Date

February 2022

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					
 - ☐ Extension of closing addendum (if applicable) 2/6
 - ☐ Repair addendum (if applicable) 2/9
 - ☐ Buyer Preapproval 2/6
 - ☒ Show completed tasks →

Buyer & Seller

Seller: G. Smith

Buyer: B. Simpson

Sale & Commission

List Price: \$356,000

Sale Price: \$350,000

Contingency Dates

Earnest Money Deposit Date: Jan 4, 2022

More Info

Lockbox - 456789

Listing Agents

Betty Stone hollis+tcystone@paperlesspipeline.com

Note / Email
Add Contact
Merge Docs
Upload Docs

Document Name

- Buyer Docs - visible to selling agents on this transaction and office staff

Addendum Groundwater 1210 06 16 Interactive

- Or, to assign a *Relative Due Date* date based on important dates related to the transaction, select [Relative Date], set your date rule, then [Set Date Rule] [Learn more about Relative Due Dates](#) →

The screenshot shows the Paperless Pipeline interface for a transaction titled "234 Arrow Road". On the left, the "Checklists" section is expanded, showing a "Pending" checklist with a 72% completion rate. Within this checklist, the "Repair addendum (if applicable)" task is highlighted, and a red arrow points to the "Relative Date" option in the "Set Date Rule" dropdown menu. The main transaction details on the right include the address "234 Arrow Road", status "Pending", MLS # "985674563", and listing agent "Betty Stone".

The best way for due dates to be added to tasks is to set the task's *Relative Due Dates* on the *Checklist Template*. When a *Checklist Template* is set up with *Relative Due Dates* then added to a transaction, its tasks will already have their due dates set. [Learn how to Add Relative Due Dates on Checklist Templates](#) →

Reorder Tasks

Who can do this? Admins with permission to *Fully manage checklists and templates*.

To reorder tasks on a transaction:

- 1 From the transaction's *Checklists* area, click and hold the **Name** of a task, then drag it to your desired position within the checklist.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Reports Reference

813 Briarcliff

Added on Apr 27, 2020 by Hollis Holcomb
Last updated 14 minutes ago by Hollis Holcomb

Sale & Commission

Sale Price: \$500,000 **Total Commission:** \$200,000

More Info Admin Info (only visible to admin staff)

Lock Box: Some default admin info...

Listing Agents

Kristian Keane kristiankeane@gmail.com 456-456-5555

Carlisle Lilly carlisle@paperlesspipeline.com

Buying Agents

Kristian Agent carol+agentl@paperlesspipeline.com

Rosemary Laucala rosemarylaucala@paperlesspipeline.com 555-555-5555

5 Contacts

Monta Cupcake, Referrer monta+cupcake@paperlesspipeline.com 2225552222

Cupcake Central

April is a regular at Cupcake Central. When they learned she wanted to move, they referred her to us!

Checklists

Pending checklist

- ☐ Executed Counter
- ☐ Purchase contract
- ☐ Preliminary title report
- ☐ Agency disclosure
- ☐ Pre-Approval (if financing involved)
- ☐ Conditional loan approval (if financing involved)
- ☐ Fully signed seller's property disclosure
- ☐ Home inspection signoff
- ☐ Final walk through signoff

Add doc name or task

Listing checklist

- ☐ Seller's Property Disclosure 4/22
- ☐ Lead-based Paint Disclosure (if applicable) 4/29
- ☐ Well water Disclosure 5/25
- ☐ Lockbox Keys 6/1
- ☐ Listing Agreement 4/14
- ☐ Mold Disclosure
- ☐ MLS Information 5/12
- ☐ Agency Disclosure 4/22
- ☐ Financial Addendum 5/4

Delete a Task

Who can do this? Admins with permission to *Fully manage checklists and templates.*

To delete a task from a transaction:

- 1 From the transaction's *Checklists* area, **hover over the task and click the [X]** that appears to the right.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

234 Arrow Road

Added on Feb 3, 2022 by Hollis Holcomb
Last updated Feb 8, 2022 by Hollis Holcomb

Email docs and notes to this transaction: 4562059-111861-TX-2753@docs.paperlesspipeline.com

General

Status: Pending **Liste**

MLS #: 985674563 **Acce**

Side: Listing **Clos**

Location: Paperless Real Estate

Buyer & Seller

Seller: G. Smith

Buyer: B. Simpson

Sale & Commission

List Price: \$356,000

Sale Price: \$350,000

Contingency Dates

Earnest Money Deposit Date: Jan 4, 2022

More Info

Lockbox - 456789

Listing Agents

Betty Stone hollis+tcystone@paperlesspipeline.com

Checklists 72% ✓

Pending

- ☐ Cooperating broker's commission agreement 2/1
- ☐ Commission disbursement authorization 2/10
- ☐ Extension of closing addendum (if applicable)
- ☐ Repair addendum (if applicat 2/11
- ☐ Buyer Preapproval
- ☒ Show completed tasks →

Add doc name or task

+ Listing

2 Click [Delete] to confirm.

Deleting a task from a transaction will only delete the task from that particular transaction and will not impact the *Checklist Template*.

Manage Your Checklist View

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.

On any transaction, view tasks assigned to the transaction from the *Checklists* area in the left menu. You will be able to view any task set to a *Visibility Type* you have access to view.

The screenshot shows the Pipeline software interface. On the left, the 'Checklists' sidebar is highlighted with a red box and a red arrow. It displays a list of tasks under the 'Pending' section, each with a completion status (e.g., 2/21, 3/2, 2/11). At the top of the sidebar, it shows '72%' completion. The main area displays transaction details for '234 Arrow Road', including status (Pending), MLS #, side (Listing), location, and listing agents (Betty Stone).

Next to any checklist, click [?] to show or [?] to hide the checklist. Pipeline will remember your preference to expand or collapse the checklist whenever you return to the transaction later.

Show Completion Status as Percentage or Ratio

Use the *Checklist Completion Status* in the upper-right corner of the checklists area to quickly check the status of a transaction's completed tasks (tasks completed by an admin).

Opt to show the *Checklist Completion Status* as a percentage or ratio.

To show the *Completion Status* as a percentage or ratio:

- 1 From the top right corner of the transaction's Checklists area, click the **Checklist Completion** [Percentage ✓] or [Ratio ✓] to toggle between percentage and ratio.

The screenshot shows the Pipeline software interface. On the left, the 'Checklists' section is expanded, showing a list of tasks with completion status (e.g., 2/6, 2/9). A red box highlights the '72% ✓' completion status, with a red arrow pointing to it. The right side of the interface shows transaction details like 'Status: Pending', 'Listed On: Dec 1, 2021', and 'Sale Price: \$350,000'.

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 Checklist Scrolling

Checklist Scrolling lets you choose what tasks and parts of the transaction you're viewing at any given time by allowing you to scroll through the checklists separately from the main transaction page.

Checklist Scrolling is useful for managing a long list of tasks, for dragging tasks to messages, and for using **Smart Checklists** to identify related docs and tasks.

To turn on **Checklist Scrolling**:

- 1 From the top of the transaction's **Checklists** area, click [⋮].
- 2 Check the box next to [Checklist scrolling].

The screenshot shows the Paperless Pipeline interface for transaction '813 Briarcliff'. On the left, a sidebar lists various actions like 'View Transaction', 'Edit Transaction', etc. The main area displays transaction details. A 'Checklists' dropdown menu is open, showing a list of tasks. The 'Checklist scrolling' option is checked and highlighted with a red box. A red arrow points to the 'Done' button at the bottom of the dropdown menu.

3 Click [Done].

Pipeline will remember your *Checklist Scrolling* preference whenever you return to any transaction later.

Sort Tasks by Due Date

By default, checklist tasks on transactions are shown in the original order set by an admin on the *Checklist Template*.

If you prefer, sort your view of tasks by due date instead.

To sort checklist tasks by due date:

- 1 From the top of the transaction's *Checklists* area, click [:].
- 2 Check the box next to [Sort by date].

The screenshot shows the Paperless Pipeline interface for a transaction titled "234 Arrow Road". On the left sidebar, the "Checklists" section is expanded, showing a list of tasks. The "Sort by date" option is highlighted in yellow, and a red arrow points to it. The "Done" button is also visible. The main area shows transaction details like status (Pending), MLS #, and listing agents.

3 Click [Done]. Tasks will appear in order by their due date.

 Pipeline will remember your sort preference whenever you return to any transaction later.

Hide @mention

Make task names easier to read by hiding any @Mention text on checklists. [Learn more about @Mention →](#)

To hide @Mention text on tasks:

- 1 From the top of the transaction's Checklists area, click [:].
- 2 Check [Hide @mention].

The screenshot shows the Paperless Pipeline interface for a transaction titled "813 Briarcliff". On the left, a sidebar lists various actions like "View Transaction", "Edit Transaction", "Upload Docs", etc. A "Checklists" panel is open, showing a list of tasks. One task, "Hide @mention", is checked and highlighted with a red box. A red arrow points from this box to the "Done" button. The main area displays transaction details: "813 Briarcliff", "Added on Apr 27, 2020 by Hollis Holcomb", "Last updated 1 minute ago by Hollis Holcomb", and "Email docs and notes to this transaction: 4568212-111443-TX-2055@docs.paperlesspipeline.com". Below this, there are sections for "General" (Status: Listed, MLS #: 04270247, Label: Residential, Side: Listing & Buying, Location: Old Pine), "Seller & Buyer", "Sale & Commission" (Sale Price: \$500,000), "More Info" (Lock Box:), and "Listing Agents" (Kristian Keane, Carlisle Lilly) and "Buying Agents" (Kristian Agent).

- 3 Click [Done]. The @Mention text will be hidden from your view of checklists on all transactions.

Pipeline will remember your preference to hide or show @Mention text whenever you return to any transaction later.

Check Off Tasks on a Transaction

Agents and admins may check off tasks on transactions to track and communicate the status of each task. Tasks can only be checked as fully completed by admins, while agents can mark tasks as done (*Agent-checked*) or not applicable (N/A) to indicate they're ready for an admin's review.

Here is an example of a typical task office's task workflow:

- An agent marks a task as either done  (*Agent-checked*) or Not Applicable  (N/A).
- An admin **filters for Agent-Checked tasks on the Tasks page** to review tasks marked as done or not applicable.
- From the *Tasks Page* or while viewing a transaction, an admin checks a task to mark it as completed  or un-marks the agent's check if they feel the task hasn't been fulfilled.

Once an admin checks a task, the task is considered fully complete and will update the

transaction's *Checklist Completion Status*.

Agents

Agents check off tasks to communicate to admins when they've finished a task or when the task is not applicable on a transaction.

When an agent marks a task as done or not applicable, the task will no longer appear in the agent's *Daily Task Reminder* email or on their *Tasks List*. The tasks will continue to appear in those two areas for the admin.

Mark a Task as Done (Agent-checked)

Who can do this?

- Agents
- Admins without permission to *Fully manage checklists and templates*.

For agents to *Agent-check* a task:

- 1 From the transaction's *Checklists* area, **check the box to the left of the task**. The task will be agent-checked.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

234 Arrow Road Added on Feb 3, 2022 by Hollis Holcomb
Last updated just now by Betty Stone

Email docs and notes to this transaction: 4562059-111861-TX-2753@docs.paperlesspipeline.com

General

Status: Pending **Liste**
MLS #: 985674563 **Acci**
Side: Listing **Clos**
Location: Paperless Real Estate

Buyer & Seller

Seller: G. Smith
Buyer: B. Simpson

Sale & Commission

List Price: \$356,000
Sale Price: \$350,000

Contingency Dates

Earnest Money Deposit Date: Jan 4, 2022

More Info

Lockbox: 456789

Listing Agents

Betty Stone hollis+tcbstone@paperlesspipelin

Checklists 78% ✓

— Pending

- ☒ Cooperating broker's commission agreement
- ☐ Commission disbursement authorization
- ☒ Extension of closing addendum (if applicable) 2/6
- ☐ Repair addendum (if applicable) 2/9
- ☒ Buyer Preapproval 2/6
- ☒ Show completed tasks →

Add doc name or task

+ Listing

[Learn more about agent-checked tasks →](#)

Admin Workflow Tip

When reviewing tasks marked as done by agents, admins may:

- Check off the task to mark it as complete.
- Un-mark the task as *Agent-checked* by clicking the [?] that appears when hovering over the task. If the un-marked task has a due date, it will start being included in the agent's *Daily Task Reminders* or on their *Tasks List*.

Set a Task as Not Applicable (N/A)

Who can do this?

- Agents
- Admins without permission to *Fully manage checklists and templates*.

For agents to mark a task as not applicable:

- 1 From the transaction's *Checklists* area, hold the [Shift] key on your keyboard and click the box to the left of the task.
- 2 When the agent task options appear, click [Not Applicable], then [Done]. The task will be set as not applicable.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Reports Reference

813 Briarcliff

Added on Apr 27, 2020 by Hollis Holcomb
Last updated 14 minutes ago by Hollis Holcomb

Side: Listing & Buying
Location: Old Pine

Seller & Buyer

Sale & Commission

Sale Price: \$500,000

More Info

Lock Box:

Listing Agents

Kristian Keane	kristiankeane@gmail.com	456-456-5555	987
Carlisle Lilly	carlisle@paperlesspipeline.com		

Buying Agents

Kristian Agent	carol+agent@paperlesspipeline.com		567
Rosemary Laucala	rosemarylaucala@paperlesspipeline.com	555-555-5555	

Contacts

Monta Cupcake, Referrer	monta+cupcake@paperlesspipeline.com	2225552222	
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Admin Workflow Tip

When reviewing tasks set as not applicable by agents, admins may:

- Check the task to mark it as complete. Tasks marked as not applicable by agents will remain

crossed out to indicate they were marked as N/A, even after fully checked.

- Delete the task to remove it from the transaction completely.
- Un-mark the task as N/A by clicking the [?] that appears when hovering over the task. If the un-set task has a due date, it will start being included in the agent's *Daily Task Reminders* or on their *Tasks List*.

Admins

For a task to be considered fully complete, it must be checked as complete by an admin.

Once an admin checks a task, the task is considered fully complete and will update the *Checklist Completion Status* of the transaction.

Complete a Task

Who can do this? Admins with permission to *Fully manage checklists and templates*.

For admins to mark a task as fully complete:

- 1 From the transaction's *Checklists* area, check the box to the left of the task.

The screenshot displays the Paperless Pipeline web application. On the left, a sidebar menu includes options like 'View Transaction', 'Edit Transaction', 'Upload Docs', and 'Checklists'. The 'Checklists' section is expanded, showing a list of tasks under the 'Pending' tab. A red arrow points to the checkbox next to the task 'Cooperating broker's commission agreement'. Other tasks include 'Commission disbursement authorization', 'Extension of closing addendum (if applicable)', 'Repair addendum (if applicable)', and 'Buyer Preapproval'. A progress bar at the top of the checklist shows '78%' completion. The main content area displays transaction details for '234 Arrow Road', including status (Pending), MLS number (985674563), side (Listing), location (Paperless Real Estate), seller (G. Smith), buyer (B. Simpson), list price (\$356,000), sale price (\$350,000), and earnest money deposit date (Jan 4, 2022).

Admins may also check off tasks directly on the *Tasks Page*. [Learn how to Check Off Tasks on the Tasks Page →](#)

