

Smart Checklists: Automatically Align Docs with Related Checklist Tasks

SUMMARY

This article shows how to save time by utilizing smart checklists on transactions to readily identify checklist tasks that correspond to documents *and* documents that correspond to checklist tasks.

 The smart checklist features work best when you have enabled checklist scrolling. Here's how to [Enable Checklist Scrolling →](#)

IN THIS ARTICLE

- [Video: Smart Checklists](#)
- [Find Tasks that Match Docs](#)
- [Find Docs that Match Tasks](#)
- [Enable Checklist Scrolling](#)

Video: Smart Checklists

 1:25

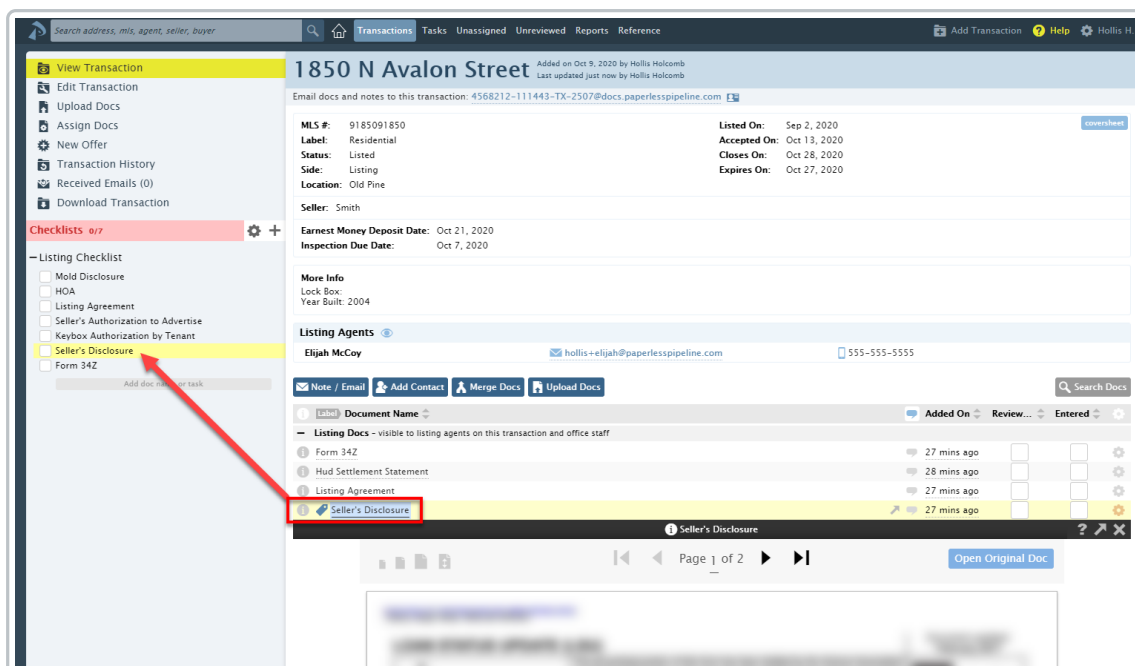
Find Tasks that Match Docs

When you're viewing documents on a transaction, you can quickly locate the corresponding task that needs to be checked off.

To find a task that matches a doc:

- 1** Navigate to the transaction and scroll down to the documents section.
- 2** From the documents section, click a document name. If the name of a task on the transaction matches (contains) the name of the selected doc, the task will be highlighted on the checklist.

For example, clicking the document named Seller's Disclosure below will result in the Seller's Disclosure task being highlighted.



In order for the highlight to occur, the document's name must appear completely inside the task's name. We recommend using Pipeline's standardized document names feature to help ensure better matching of docs to tasks.

Learn more about using standardized document names by viewing [Standardized Document Names](#) →

Find Docs that Match Tasks

When reviewing completed tasks on a transaction, you can quickly identify the doc that corresponds to that completed task.

To find a doc that matches a task:

- 1 Navigate to the transaction and scroll down to view the list of documents.
- 2 From the checklists area, hover over a task name. If the name of a doc on the transaction matches (is contained in) the name of the hovered-over task, the doc will be highlighted in the list of documents.

For example, hovering over the task named Listing Agreement below will result in the Listing Agreement doc being highlighted.

The screenshot shows the Pipeline software interface for a transaction at 1850 N Avalon Street. On the left, a sidebar contains a 'Checklists' section with a list of documents. 'Listing Agreement' is highlighted with a red box. A red arrow points from this box to the 'Listing Agreement' document in the main document list. The document list is organized into sections: 'Listing Docs', 'Sale Docs', and 'Buyer Docs'. Each document entry includes a name, a timestamp (e.g., '27 mins ago'), and checkboxes for 'Review' and 'Entered'.

In order for the highlight to occur, the document's name must appear completely inside the task's name. We recommend using Pipeline's standardized document names feature to help ensure better matching of tasks to docs.

Learn more about using standardized document names by viewing [Standardized Document Names](#) →

Enable Checklist Scrolling

The smart checklist features work best when you have enabled checklist scrolling.

To enable checklist scrolling:

- 1 Go to a transaction's checklist area.
- 2 From the checklist menu bar, click the gear.
- 3 Select the box next to [Checklist Scrolling] then select [Done]. You only need to do this once. Pipeline will remember your choice.

Search address, mls, agent, seller, buyer

TransactionsTasksUnassignedUnreviewedReportsReference

Add TransactionHelpHollis H

View Transaction

Edit Transaction

Upload Docs

Assign Docs

New Offer

Transaction History

Unread Emails (0)

Unread Transaction

Checklists of

Listing Checklist

Sort by date

Hide @mention

Done

Mold Disclosure

HOA

Listing Agreement

Seller's Authorization

Keybox Authorization by Tenant

Seller's Disclosure

Form 342

Add doc name or task

1850 N Avalon Street

Added on Oct 9, 2020 by Hollis Holcomb

Last updated 1 hour ago by Hollis Holcomb

Email docs and notes to this transaction: 4568212-111443-TX-2507@docs.paperlesspipeline.com

MLS #: 9185091850

Label: Residential

Status: Listed

Side: Listing

Location: Old Pine

Seller: Smith

Listed On: Sep 2, 2020

Accepted On: Oct 13, 2020

Closes On: Oct 28, 2020

Expires On: Oct 27, 2020

Earnest Money Deposit Date: Oct 21, 2020

Inspection Due Date: Oct 7, 2020

More Info

Lock Box:

Year Built: 2004

Listing Agents

Elijah McCoy

hollis+elijah@paperlesspipeline.com

555-555-5555

Note / Email

Add Contact

Merge Docs

Upload Docs

Search Docs