

Add a Checklist to a Transaction

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 **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

View Transaction
 Edit Transaction
 Upload Docs
 Assign Docs
 New Offer
 Transaction History
 Received Emails (0)
 Download Transaction

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
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+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 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 displays the Paperless Pipeline interface for a transaction titled "234 Arrow Road". On the left, a sidebar lists various actions like "View Transaction", "Edit Transaction", and "Checklists". 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. On the right, the transaction details are shown, including the address, status, MLS number, and various dates. A red arrow points from the "Add doc name or task" button to the "Earnest Money Deposit Date" field.

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+tcstone@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 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 'Checklists' section is expanded, showing a list of tasks. The 'Buyer Preapproval' task is highlighted with a red arrow, and a pencil icon is visible next to it, indicating it can be edited. The task is currently marked as '2/11'.

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+tcstone@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 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].

- 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*:

- [Transactions](#)
[Tasks](#)
[Unassigned](#)
[Unreviewed](#)
[Reports](#)
[Reference](#)

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

Checklists

72% ✓

Pending

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

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 →

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+tcystone@paperlesspipeline.com

Note / Email

Add Contact

Merge Docs

Upload Docs

Label 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 "Set Date Rule" button is also visible. The right side of the interface displays transaction details, including the status "Pending", MLS number "985674563", and the 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 displays the Paperless Pipeline interface for transaction '234 Arrow Road'. On the left, a sidebar menu is visible with the 'Checklists' option highlighted by a red box and a red arrow. The 'Checklists' section shows a list of tasks under the 'Pending' category, each with a completion percentage and a checkmark. The main area displays transaction details, including the status (Pending), MLS # (985674563), and various dates (Listed On: Dec 1, 2021; Accepted On: Feb 1, 2022; Closes On: Mar 3, 2022). The 'Checklists' section also shows a list of tasks with completion percentages (e.g., Cooperating broker's commission agreement: 2/21, Commission disbursement authorization: 3/2).

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 their completion status. A red box highlights the '72% ✓' completion status, with a red arrow pointing to it. The right side of the interface shows transaction details for '234 Arrow Road', including 'Status: Pending', 'Listed On: Dec 1, 2021', 'Accepted On: Feb 1, 2022', and 'Closes On: Feb 11, 2022'.

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, a sidebar contains a "Checklists" section with a "Sort by date" option highlighted by a red box and a red arrow. The main panel displays transaction details: Status: Pending, MLS #: 985674563, Side: Listing, Location: Paperless Real Estate. It also shows Buyer & Seller information (Seller: G. Smith, Buyer: B. Simpson), Sale & Commission details (List Price: \$356,000, Sale Price: \$350,000), and Contingency Dates (Earnest Money Deposit Date: Jan 4, 2022). The Listing Agents section shows Betty Stone.

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, there's a sidebar with options like "View Transaction", "Edit Transaction", "Upload Docs", etc. The main area displays transaction details: "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". A checklist is open, showing a list of tasks. The "Hide @mention" option is checked and highlighted with a red box and arrow. The checklist also includes a "Done" button. The right side of the interface shows transaction details like "Status: Listed", "MLS #: 04270247", "Label: Residential", "Side: Listing & Buying", and "Location: Old Pine". It also lists "Listing Agents" (Kristian Keane, Carlisle Lilly) and "Buying Agents" (Kristian Agent, Carol Lilly).

- 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.

The screenshot displays the Paperless Pipeline software interface. On the left, a sidebar contains a 'Checklists' section with a list of tasks such as 'Fully signed seller's property disclosure' and 'Conditional loan approval'. Below this is a 'Listing checklist' section with tasks like 'Lead-based Paint Disclosure' and 'Lockbox Keys'. Some tasks have due dates indicated in red boxes (e.g., 4/29, 6/1, 4/14, 5/12). The main content area shows transaction details for '813 Briarcliff', including 'Side: Listing & Buying', 'Location: Old Pine', 'Sale Price: \$500,000', and lists of 'Listing Agents' and 'Buying Agents'. A blue overlay at the bottom left features a 'Shift' key icon and the text '+ click', indicating the action to mark a task as not applicable.

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'. The right side of the screen shows transaction details for '234 Arrow Road', including status (Pending), MLS number, side (Listing), location, and buyer/seller information.

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

