Use Tasks to Track Dates on Transactions

Use *Checklist Tasks* to track dates that aren't covered by regular transaction dates and to help agents and admins keep track of important dates.

Who Can Do This? Admins with permission to *Fully Manage Checklists and Templates* can set up date *Tasks*. Agents and admins can take advantage of them throughout Pipeline.

Purpose

Tracking dates with *Checklist Tasks*:

- Helps track additional dates on the transaction when regular *Transaction Dates*, *Optional Transaction Date Fields*, and *Custom Date Fields* are not a good fit.

- Helps agents and admins stay on top of important dates on transactions, the *Tasks* page, in *Daily Task Reminders*, and in other places they already get reminded about *Tasks*.

How It Works

To track dates using *Tasks*, an admin must first set them up in *Checklist Templates*. Setting up dates as *Tasks* allows them to be used as additional date fields on transactions and gives them their own special powers.

Setting up transaction dates as *Tasks* allows you to take advantage of the following *Task* features:

- **Automatically Applied Checklists**: Track the proper transactions and make the tracking process as hands-free as possible.
- **@Mention**: Highlight the date for certain users or groups.
- **Relative Due Dates**: Automatically calculate the date when it is related to a date on the transaction.
- **Task Visibility**: Show the date only to certain people.
- **Key Dates**: Take advantage of transaction timeline features.
- **Agent-editable Due Dates**: Allow agents to update the date

Everyone on your team can enjoy the benefits of date *Tasks* once an admin sets them up and they start being added to transactions.

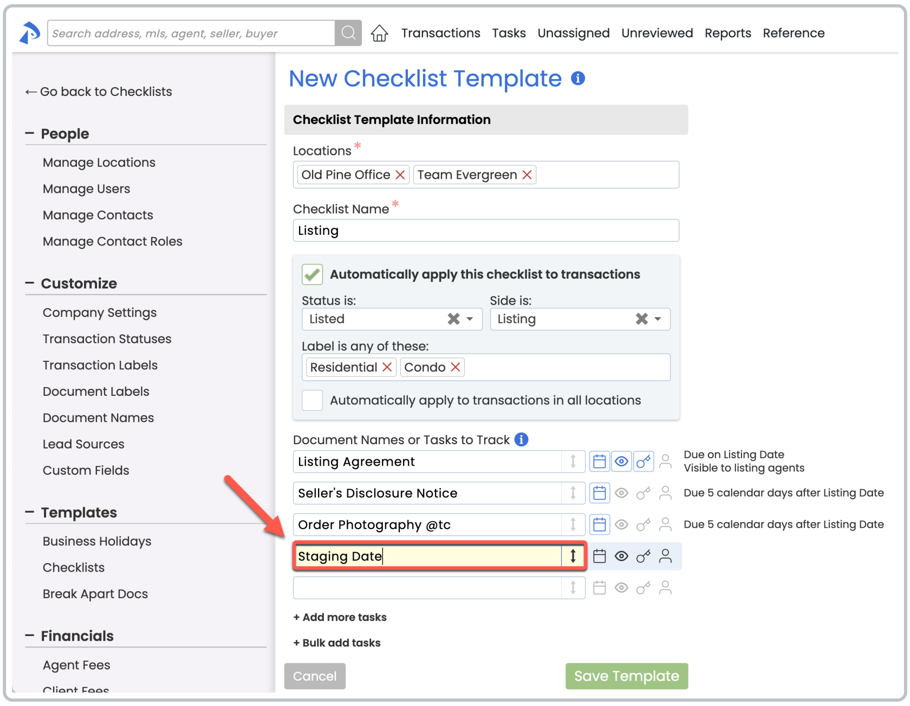
Set Up Date Tasks

To set up a *Task* to track a date:

1. **Create a new *Checklist Template* or edit an existing one where the date can be added.** Learn more about Managing Checklist Templates →

2. **Make sure the *Checklist Template* is set to automatically apply** to the appropriate transactions, based on *Location(s)*, *Status*, *Side(s)* and / or *Label(s)*. Learn more about Automatically Applying Checklist Templates →

3. **Add a *Task* for the date to the *Checklist Template*.** For example, to track the "Staging Date," enter "Staging Date."



4. **Optimize the date *Task*:**

   - ***@Mention* specific people or groups** in the *Task* to highlight the date for them.
     Learn more about @Mention →

   - **Set a *Relative Due Date*** to automatically calculate the date on transactions when the date is typically based on another transaction date.
     Learn more about Relative Due Dates →

• **Set a *Visibility Type*** to show the date only to certain people.
Learn more about Task Visibility →

• **Designate the *Task* as a *Key Date*** to take advantage of transaction timeline features.
Learn more about Key Dates →

• **Allow agents to update the date** once it's been added to transactions.
Learn more about Allowing Agents to Change Due Dates →

5 **Save the template** then sit back and wait for the new date *Task* to start applying automatically to transactions.

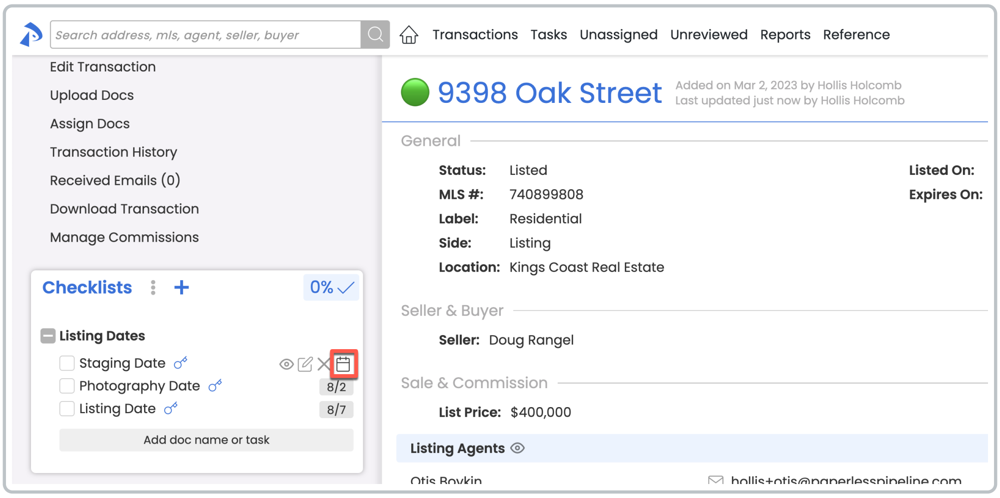
6 **Take advantage of the features of *Tasks* to track the date** once it starts applying automatically to transactions.

Use Date Tasks

Once a date *Task* is added to transactions and a date is set for it, agents and admins can take advantage of the following tracking abilities of *Tasks*.

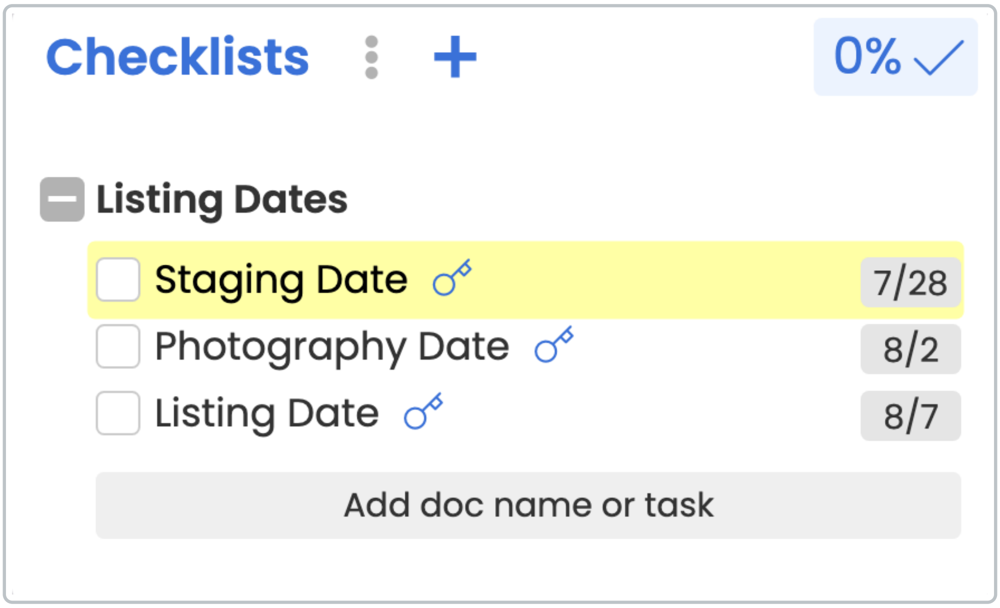
Add / Manage the Date on Transactions

Tasks give admins the ability to update the date on transactions. Agents can also update the date if it has been set as *Agent-editable* by an admin.
Learn how to Manage Checklists on Transactions →



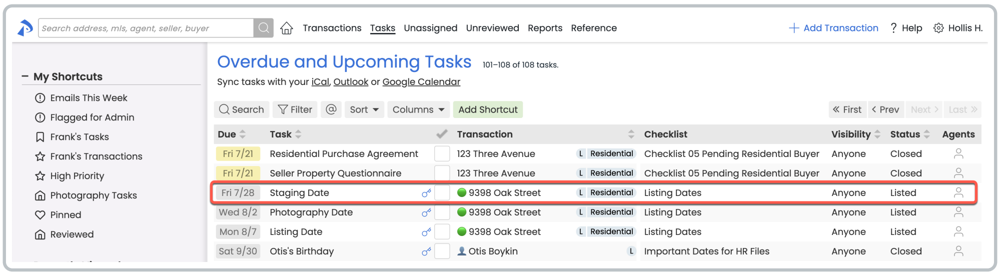
View the Date on Transactions

Once a date is set for a*Task*, it will conveniently show next to the*Task* in the *Checklists* area on the transaction.
Learn how to View Checklists on Transactions →



View the Date on the Tasks Page

Once a date is set for a*Task*, it can be tracked on the*Tasks* page along with other upcoming and overdue *Tasks*.
Learn more about the Tasks Page →



Get Reminders

Agents and admins can also get reminded about the date in*Daily Task Reminders* and synced calendars.

Daily Task Reminders

Agents and admins who are opted into receiving*Daily Task Reminders* will get email reminders about any date *Tasks* that are upcoming or in the past.
Learn more about Daily Task Reminders →

Synced Calendars

Agents and admins who have synced their*Tasks* will see date *Tasks* on their calendars. If they have set up notifications in their calendar app, they will also be notified.
Learn more about Syncing Calendars →