

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:

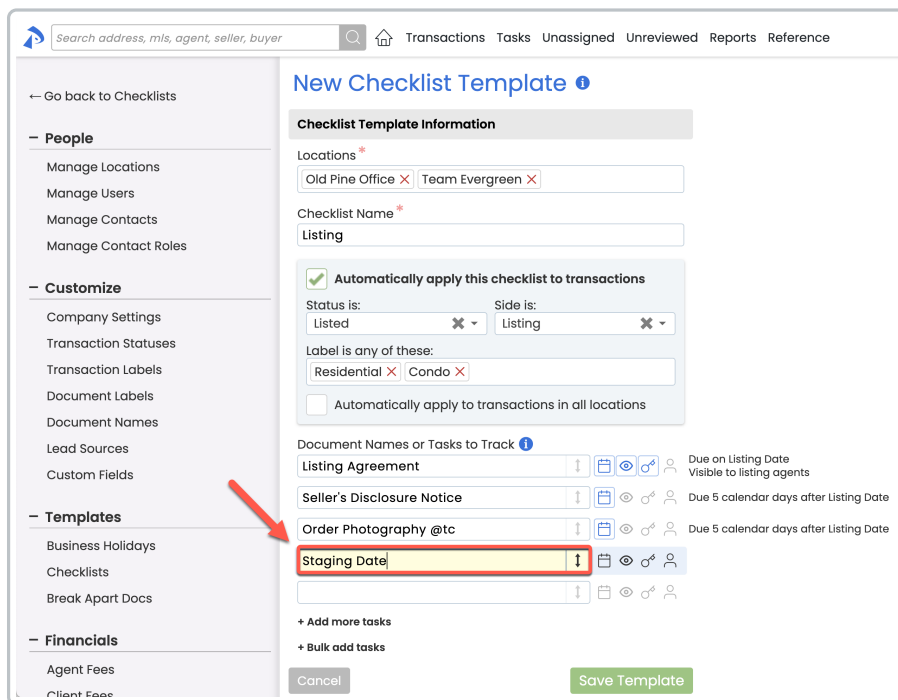
- **Automatically Applied Checklists:** Track the proper transactions and make the tracking process as hands-free as possible.
- **@Mention:** Highlight the date for certain users or groups.
- **Relative Due Dates:** Automatically calculate the date when it is related to a date on the transaction.
- **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."



Search address, mlis, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

Go back to Checklists

People

- Manage Locations
- Manage Users
- Manage Contacts
- Manage Contact Roles

Customize

- Company Settings
- Transaction Statuses
- Transaction Labels
- Document Labels
- Document Names
- Lead Sources
- Custom Fields

Templates

- Business Holidays
- Checklists
- Break Apart Docs

Financials

- Agent Fees
- Client Fees

New Checklist Template

Checklist Template Information

Locations *
Old Pine Office X Team Evergreen X

Checklist Name *
Listing

☒ Automatically apply this checklist to transactions

Status is: Listed Side is: Listing

Label is any of these:
Residential X Condo X

☐ Automatically apply to transactions in all locations

Document Names or Tasks to Track

Listing Agreement	Due on Listing Date Visible to listing agents
Seller's Disclosure Notice	Due 5 calendar days after Listing Date
Order Photography @tc	Due 5 calendar days after Listing Date
Staging Date	

+ Add more tasks
+ Bulk add tasks

Cancel Save Template

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 →](#)

The screenshot shows a web application for managing real estate transactions. On the left is a sidebar with navigation links: Edit Transaction, Upload Docs, Assign Docs, Transaction History, Received Emails (0), Download Transaction, and Manage Commissions. Below these is a 'Checklists' section with a '+0%' indicator and a 'Listing Dates' sub-section. The 'Listing Dates' section contains three items: 'Staging Date' with a date of 8/2, 'Photography Date' with a date of 8/2, and 'Listing Date' with a date of 8/7. A red box highlights the date '8/2' next to 'Staging Date'. The main content area on the right displays the address '9398 Oak Street' and various transaction details: Status: Listed, MLS #: 740899808, Label: Residential, Side: Listing, Location: Kings Coast Real Estate, Listed On: (blank), and Expires On: (blank). Below this, it shows 'Seller & Buyer' as Doug Rangel, 'Sale & Commission' with a 'List Price' of \$400,000, and 'Listing Agents' as Otis Roukin and hallie+tatis@nanerlessneline.com.

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 →](#)

This is a close-up of the 'Checklists' section from the previous screenshot. It features a header with 'Checklists', a vertical ellipsis, a plus sign, and a '0% ✓' status indicator. Below the header is a section titled 'Listing Dates' with a minus sign icon. It contains three checklist items, each with a checkbox, a task name, a key icon, and a date in a grey box: 'Staging Date' (7/28), 'Photography Date' (8/2), and 'Listing Date' (8/7). The 'Staging Date' row is highlighted in yellow. At the bottom is a grey button labeled 'Add doc name or task'.

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 →](#)

Search address, mls, agent, seller, buyer

Transactions **Tasks** Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Hollis H.

Overdue and Upcoming Tasks

Sync tasks with your iCal, Outlook or Google Calendar

101-108 of 108 tasks

Search Filter Sort Columns Add Shortcut

« First < Prev Next > Last »

Due	Task	Transaction	Checklist	Visibility	Status	Agents
Fri 7/21	Residential Purchase Agreement	123 Thre Avenue	Residential Checklist 05 Pending Residential Buyer	Anyone	Closed	
Fri 7/21	Seller Property Questionnaire	123 Thre Avenue	Residential Checklist 05 Pending Residential Buyer	Anyone	Closed	
Fri 7/28	Staging Date	9398 Oak Street	Residential Listing Dates	Anyone	Listed	
Wed 8/2	Photography Date	9398 Oak Street	Residential Listing Dates	Anyone	Listed	
Mon 8/7	Listing Date	9398 Oak Street	Residential Listing Dates	Anyone	Listed	
Sat 9/30	Otis's Birthday	Otis Boykin	Important Dates for HR Files	Anyone	Closed	

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 →](#)