

Document Names or Tasks to Track FAQ

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Tasks can be documents or steps, they can hold clickable links, and you add them one by one or in bulk. Answers to the common questions about what a task is, adding links, and grouping tasks.

What's the difference between a task and a document?

A task is a line on the checklist; a document is the file itself. A task can stand for a document you need to collect or an action someone needs to take. When the document gets uploaded or the step gets done, you check the task off.

Can I add a link to a task?

Yes. Paste a complete URL into the task name and it becomes clickable, opening in a new window — a quick way to point your team to a form, portal, or instructions right from the checklist.

What's the fastest way to add a lot of tasks?

Use [Bulk Add Tasks]. Paste or type your list with one task per line, click [Add Tasks], and every line becomes its own task on the template.

Can I reorder tasks?

Yes — drag them into place. Use the move handle to the right of a task to set the order tasks appear on transactions. Each person can still sort their own view by due date if they prefer.

Can I make a checklist within a checklist, or sub-tasks?

Not today. Tasks live as a single flat list on a checklist — there aren't nested sub-tasks. Many offices get a similar result by grouping related tasks together in order, or by using @mentions and visibility to route a set of tasks to one person. If sub-checklists would help how you work, tell us at help@paperlesspipeline.com — your feedback shapes what we build next.

Who can add or change tasks?

Admins. Adding, editing, and deleting tasks is an admin function. Agents can work a checklist on a transaction but can't change the tasks themselves.

Learn More

The tasks on a checklist are the documents to collect and the steps to finish on a transaction.

See [Document Names or Tasks to Track](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
