Document Names or Tasks to Track

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

Introduction

A checklist template is an empty shell until you tell it what to track. **Document Names or Tasks to Track** is where that goes: one line for each thing the deal needs, whether that's a document coming in or a step somebody has to take.

Pipeline treats both kinds of line the same way, and that's deliberate. *Signed Listing Agreement* and *Order the sign* each become a task someone can check off, so one list covers the whole deal instead of a document list sitting next to a to-do list. Each line also carries its own timing, its own visibility, and whoever it belongs to, which means what you type here is what lands on every transaction that checklist reaches.

The practical effect is that the checklist becomes the answer to what's still outstanding on a file, for anyone who opens it. Two things are worth knowing as you write the list. A task can carry a link to the form or portal it refers to, so nobody has to go hunting for it. And tasks live inside checklists rather than beside them, so a one-off item goes onto a checklist the transaction already has.

How It Works

Tasks are the building blocks of a checklist. You add them to a template, arrange them, and give each one the settings it needs.

A Task Is a Document or a Step

A task can stand for a document to upload — like *Signed Listing Agreement* — or an action to take, like *Order the sign*. Either way, tracking it on the checklist tells your team what's still outstanding.

Add Tasks One at a Time or in Bulk

Type tasks into the list one by one, or paste a whole list at once with [Bulk Add Tasks] — handy when you're building a template from an existing checklist or spreadsheet.

Add a Link to a Task

Paste a complete URL into a task and it becomes clickable, opening in a new window. It's a simple way to point your team to a form, a portal, or an instruction page right from the task.

What Each Task Can Carry

Beyond its name, a task can hold a due date, a visibility setting, a key-date flag, and an @mention. Those settings are what turn a plain to-do into an automatic reminder aimed at the right person.

A Task Finds Its Doc by Name

When a doc's name is contained in a task's name, Pipeline pairs them on the transaction. Hover over the task and the matching doc highlights, and click the doc to highlight the matching task. A task called Review HOA Documents matches a doc called HOA Documents but not one called HOA Docs. The highlight never checks the task off for you.

Add Tasks to a Template

Add tasks to the Document Names or Tasks to Track list on any template.

Who Can Do This: Master admins and admins with the *Fully manage checklists and templates* permission.

To add tasks to a template:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Select [Checklists] from the left menu.
3. Click [Add Checklist Template] to start a new one, or click [the gear] next to an existing template and select [Edit Template].
4. Type a task into the *Document Names or Tasks to Track* list.
5. Click [+ Add more tasks] for each additional task you want.
6. Click [Save Template].

Your tasks now appear on every checklist created from this template.

Bulk Add Tasks

Paste or type a whole list of tasks into a template at once.

Who Can Do This: Master admins and admins with the *Fully manage checklists and templates* permission.

To bulk add tasks:

1. Open a template for editing, or start a new one with [Add Checklist Template].
2. Click [Bulk Add Tasks].
3. In the field, paste or type your tasks — one task per line.
4. Click [Add Tasks] to drop them into the list above.
5. Click [Save Template].

Every line becomes its own task, ready to fine-tune with due dates, visibility, and @mentions.

Reorder Tasks

Drag tasks into the order you want them to appear on transactions.

Who Can Do This: Master admins and admins with the *Fully manage checklists and templates* permission.

To reorder tasks:

1. Open the template for editing.
2. Click [the move handle] to the right of the task you want to move.
3. Drag and drop the task into its place in the list.
4. Click [Save Template].

Tasks display in this order on every transaction the template touches, though each person can still choose to sort their own view by due date.

Delete a Task

Remove a task you no longer need from the template.

Who Can Do This: Master admins and admins with the *Fully manage checklists and templates* permission.

To delete a task:

1. Open the template for editing.
2. Delete all the text in the task you want to remove.
3. Click [Save Template].

The empty task drops off when you save. As with any template change, this only affects transactions the checklist is added to from here on.

Frequently Asked Questions

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.

Can I attach a document to a task, or have the task check itself off?

No. The link is the name. A doc whose name sits inside the task name highlights when you hover over that task, and you still check the task off yourself.