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.

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 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 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.

Document Names or Tasks to Track FAQ

A task can be a document or a step, links inside a task are clickable, and you can add tasks one by one or in bulk. Answers to the common questions about tasks versus documents, adding links, and reordering. See Document Names or Tasks to Track FAQ.

Ways to Use Document Names or Tasks to Track

See Document Names or Tasks to Track at work inside a bigger job:

- Set Up Tasks That Only Apply to Some Deals