Make a Long Checklist Readable

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Pipeline has no priority flag, no color picker, and no bold button. What it has is a name field on every task — and that turns out to be enough.

Introduction

A twenty-eight item closing checklist is a wall of identical grey lines. Somewhere in it are the three documents that will hold up the file and the four that only apply to a short sale, and nothing about the list says which is which. So people read the first few, skim the rest, and you find out what got missed at closing.

Every formatting lever Pipeline gives you here is the same lever: the name. There's no required field on a task, no priority setting, no color, and no way to bold the text. But the name is a plain text field that accepts anything you type: words, punctuation, numbers, emoji. It displays exactly as typed on every transaction the template touches. Offices that run long checklists well are all doing the same handful of things inside that one field.

When to Use This

- Your checklist has grown past the point where anyone reads all of it.
- Some tasks are mandatory and some are "only if it applies," and there's no way to tell them apart.
- You went looking for a way to mark a task high priority, or to make it red, or to bold it.
- Task names have turned into paragraphs of instructions and the text runs out of room on screen.
- You numbered your tasks and they're sorting 1, 10, 11, 2 instead of in order.

Why This Lives in the Task Name

The instinct is to hunt for the setting — a priority dropdown, a color swatch, a required checkbox, the bold button. None of them exist, and it's easy to read that as Pipeline not being able to do this.

What Pipeline has instead is a name that renders exactly as you typed it, everywhere the task appears: on the transaction, on the Tasks page, in the morning reminder email. Anything you put in there travels with the task. So a convention typed into the template once — a red circle for what's mandatory, *(if applicable)* for what isn't, a two-digit number for the order — behaves like formatting, applies to every future transaction, and costs you one afternoon of editing.

1. Say Required or Optional Right in the Name

Nothing in Pipeline marks a task as required, and nothing stops a file from closing with tasks unchecked. So say it in words. Add `- REQUIRED` to the ones that aren't negotiable, and put `(if applicable)` on the ones that often aren't — *Lead Based Paint (if applicable)* reads correctly to everyone who sees it, and stops the "why is this still open" question before it's asked.

Pick one phrasing and use it everywhere. Two conventions running side by side is worse than none, because now the absence of a marker means nothing.

2. Lead the Name With a Colored Emoji

There's no color setting for tasks, but emoji work in any text field in Pipeline, including task names and checklist names. A colored circle or square at the front of the name gives you the color coding, and it's visible to everyone on the transaction.

Keep the vocabulary small — three or four symbols, each meaning one thing — and put the emoji first so the markers line up down the left edge of the list where the eye can scan them. Post the key somewhere your team can find it, because a color system nobody has the legend for is just decoration.

> Emoji go in the checklist name too, which is useful when a transaction carries several lists and you want the compliance one to stand out from the marketing one.

3. @Mention the Person Who Owns It

This is the one highlight Pipeline applies for you, and it's better than a color because it's per person: @mention someone on a task and that task shows up green for *them* — on the transaction, on their Tasks page, and in their daily reminder email. Everyone else sees it plain.

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See [Task @Mentions]

> `@lastname` names one person. `@rolename` reaches everyone who holds that role, which is what you want on a template that goes to many offices — the mention keeps working when the individual changes.

4. Number the Tasks With Leading Zeros

Numbering makes a sequence explicit — useful when the order is the process, not just a preference. Prefix each task with its number and use a leading zero: `01`, `02`, through `10`, `11`. Without the zero, any place the list gets sorted by name will file 10 and 11 in between 1 and 2, which is the sorting complaint nearly everyone hits once.

Do it on the template so the numbering arrives with the checklist rather than being re-typed on each transaction. And leave gaps in your head, not in the numbers — renumbering ten tasks to insert one is the cost of this convention, and it's worth paying only when the order genuinely matters.

5. Set the Order You Want on the Template

Numbering describes the order; the template decides it. Tasks appear on every transaction in the order they sit in on the template, and rearranging them there is a drag. There's no automatic alphabetical sort to switch on, so the template order is the order.

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]

The checklists themselves are a separate matter — their order lives on the transaction, not the template.

The Checklists area is where a transaction's checklists live — expand them, reorder them, and set how they display.

See Checklists Panel

6. Move the Long Instructions to the Reference Page

Task text can't be expanded or resized, so a name carrying three sentences of process gets clipped and the whole list gets harder to read. The fix isn't a shorter process — it's putting the process somewhere it can breathe.

Write the detail up as a PDF, post it on your Reference page, and let the task name be the short instruction it should have been. *Order title — see Title Ordering Guide* is a readable line; the guide itself is one click away for anyone who needs it.

Your company's Reference page is the shared library — the blank forms, disclosures, training material, and links an admin posts once so nobody on the team has to hunt for them.

See Reference Library & Forms