Set Up Tasks That Only Apply to Some Deals

Last Modified on 09/04/2026 11:05 am EDT

A well and septic addendum belongs on rural properties, not on condos. Build your templates so the conditional paperwork lands on the deals that need it and never shows up on the ones that don't.

Introduction

Every office has them. The lead-based paint disclosure that only applies to older homes, the FHA amendatory clause that only applies to FHA loans, the well and septic addendum that only applies out in the county. Real requirements, on real deals — just not on *every* deal.

Put them on your main template and they follow every transaction you open. They sit there unfinished, they go overdue on files they were never meant for, and somebody has to deal with each one by hand before the checklist reads finished. Multiply that by a few conditional forms and your Tasks page fills with work nobody was ever going to do.

The fix isn't a setting on the task. It's how you divide the tasks up in the first place: what stays on the template every deal gets, what moves onto a template you apply only when the condition is met, and what a task carries once it's there. This is admin work, done once in your account settings, and it holds for every transaction afterward.

When to Use This

- You collect a form — lead-based paint, a well and septic addendum, an FHA amendatory clause — that only some of your deals ever need.
- Conditional tasks are going overdue on transactions they don't belong to, and your Tasks page is full of items nobody was ever going to do.
- Your checklists never read finished, because there's always a handful of tasks that didn't apply to that particular deal.
- You went looking for a required-versus-optional setting on a task and couldn't find one.
- Your agents are marking the same tasks Not Applicable on deal after deal, and an admin still has to clear each one.

Why This Beats Waiting for an Optional Flag

The instinct is that there must be a toggle somewhere — mark the task optional, and it steps aside on its own when it doesn't apply. There isn't one. There's no required-versus-optional designation on a checklist task, and hunting for it is what sends most people here.

The two things that look like a substitute both come up short. Marking a task Not Applicable is a signal, not a resolution: it tells an admin the agent thinks the step doesn't fit, and the task keeps standing until that admin checks it off or deletes it — on that deal, and on the next one, and every one after. Taking the due date off quiets a task, but the task still lives on the checklist and still counts as incomplete. Both leave you handling the same item over and over on files where it never belonged. Deciding at the template instead means the task isn't on the deal, so there's nothing to mark, resolve, or explain.

1. Decide Which Tasks Are Really Conditional

Go down your main template and ask one question of each line: would you chase this document on every single deal? If the honest answer is no, it's a candidate to move.

Then group what you pulled by *the condition that triggers it* — property type, loan type, which side you're on — rather than sweeping it all into one bucket called Optional. A group like **Well & Septic** or **FHA Loan** earns its own checklist because a person can look at a transaction and know in a second whether it applies. A single grab-bag can't be applied that way; you'd be right back to reading it line by line. Offices that keep one combined list usually name it for the category instead — **If Applicable** or **Contingencies** — and it works, it's just coarser.

> Not every conditional task is worth splitting out. For a one-off that comes up occasionally and doesn't carry a deadline, a common convention is to write the condition right into the task name — *Lead-Based Paint Disclosure (if applicable)* — so anyone reading the list knows it isn't automatic. It's a label for humans, not a setting; Pipeline treats the task like any other.

2. Build a Template for Each Conditional Group

Create a separate checklist template holding just that group's tasks. Keep it small and name it for the condition, so it reads as an obvious yes or no when someone's looking at a file.

Build a new checklist template from scratch — name it, pick the locations that use it, and load it with the tasks a deal depends on.

See [Adding a Checklist Template]

3. Take Those Tasks Off Your Main Template

Now clear them out of the template every deal gets — otherwise you've just made a second copy of the problem. An admin opens the main template for editing and removes each task that moved.

The same goes for anything your office never collects. If a form on your template doesn't apply to your market at all, delete it rather than working around it forever.

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]

> Editing a template only changes the transactions its checklist reaches from here on. Deals already in flight keep the checklist they were given, so the tasks you just removed are still sitting on them — an admin can delete those individually on each transaction. Agents can't; removing tasks is an admin action by design.

4. Apply the Conditional Checklist Only Where It Belongs

From here, the conditional tasks arrive only when someone decides they apply. An admin adds the checklist to the transaction by hand, the moment the condition is real — the property turns out to be on a well, the buyer's financing comes back FHA.

Add a checklist to a single transaction by hand — for when it wasn't assigned automatically.

See Applying a Checklist

> If the condition is something Pipeline already knows about the transaction — its status, its side, or a label you put on it — a template can assign itself when those rules match, instead of waiting on someone to remember. That automatic assignment is covered in the Automation guides.

5. Leave the Due Date Off the Tasks You Keep

Some conditional tasks are worth keeping on the main template anyway — you want the line visible on every file as a prompt, you just can't say when, or whether, it'll come due. Give those no due date at all.

A due date is what puts a task on your Tasks page, into your reminder emails, and onto your calendar — and taking it back off is how you quiet a task you no longer need.

See Task Due Dates

> This buys you quiet, not completion. A task with no due date still sits on the checklist and still counts as incomplete — it just stops chasing anyone. Reach for it when you want the reminder to be a person's eyes on the list, not an email.

6. Mark What Slipped Through as Not Applicable

Templates are a plan, and deals break plans. When a task turns out not to fit a particular transaction after all, that's what Not Applicable is for — the per-deal exception, not the standing policy.

Some tasks on a checklist just don't apply to a given deal — mark them Not Applicable to set them aside without pretending they're done.

See Not Applicable Tasks

> If you're clearing a backlog of them, admins can filter the Tasks page by**Agent Checked** to pull up what agents have flagged and work through it in one pass rather than transaction by transaction.

> If the same task is being marked Not Applicable on most of your deals, that's the template talking, not the deals. Come back to step 1 and move it — an exception you make every time was never an exception.