Completion Percentage

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See how far along a transaction is at a glance — shown as a percentage or a ratio of completed tasks.

Introduction

You want to know where a deal stands without reading the whole file. The completion status in the corner of a transaction's Checklists area answers that in one number: how much of the checklist work is finished.

It reads across every checklist on the transaction rather than the one in front of you, so a file carrying a listing list and a closing list still gets a single figure. The number moves when a task gets checked off, which isn't quite the same thing as a document arriving. Uploading a doc puts it on the file; an admin checking the matching task off is what settles the item.

If the number sits lower than the file feels, that's usually the gap between docs in and tasks checked rather than anything lost. And you can have it as a percentage or as a ratio, whichever tells you more at a glance.

How It Works

The number answers one question — how many tasks are complete — and it's worth knowing exactly which tasks it counts.

What Counts as Done

A task counts toward the percentage once it has been checked as complete by an admin. When an agent checks a task it's marked **agent-checked** and waits for review, so the number doesn't move until that review happens.

It Spans Every Checklist

The status reflects **all** tasks across **all** checklists on the transaction — not just the checklist you happen to be looking at. So the number stays the same as you click between checklists. It only reflects a single checklist's tasks when that transaction has just one checklist.

Percentage or Ratio

Click the status to switch between a percentage and a ratio. Pipeline remembers which format you prefer the next time you open the transaction.

Switch Between Percentage and Ratio

Toggle the completion status between a percentage and a ratio.

Who Can Do This: Anyone with access to the transaction — it's a personal display setting.

To switch between percentage and ratio:

1. From an open transaction, find the Checklist Completion status in the upper-right corner of the Checklists

area.

2. Click the [Percentage] or [Ratio] value to toggle between the two.

Your view switches format right away, and Pipeline keeps your choice whenever you return to the transaction.

Frequently Asked Questions

What does the completion percentage count?

Only tasks an admin has checked as complete. Agent-checked tasks are waiting on an admin's review and don't move the number until that admin approves them.

Why doesn't the percentage change when I open a different checklist?

Because it measures the whole transaction, not one checklist. The status counts every task across every checklist on the transaction, so it reads the same no matter which checklist you're viewing. It only reflects a single checklist's tasks when the transaction has just one checklist.

Why does it show less than 100% when I've finished a checklist?

Another checklist on the transaction still has open tasks. For example, a transaction with 18 tasks across its checklists and 17 complete shows 94% — even though the checklist you finished has its own green checkmark. The missing task lives on a different checklist.

Can I see a ratio instead of a percentage?

Yes — click the status to toggle. It switches between a percentage (94%) and a ratio (17/18), and Pipeline remembers your choice for next time.

Does a duplicate checklist throw off my percentage?

Yes. A checklist added twice counts its tasks twice in the total, which drags the percentage down. If that's happened, remove the extra copy from the Checklists panel.