

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.

Completion Percentage FAQ

The completion status is a quick read on how far along a transaction is. Answers to the common questions about what the number counts, why it spans every checklist, and switching between a percentage and a ratio. See [Completion Percentage FAQ](#).
