See Which Files Are Behind Without Opening Each One

Last Modified on 09/04/2026 11:06 am EDT

One search on the Transactions page finds every file still carrying an open checklist — and a hover tells you exactly what's missing, without opening a thing.

Introduction

Twelve closings this month and you need to know which ones are short a document. Opening each file to find out costs an hour you don't have, and by the afternoon the answer is already stale.

The Transactions list already knows. **More Search Options** narrows it to the transactions carrying an incomplete checklist, and the *Complete* column on each row holds the detail. Hover the completion ratio and Pipeline lists that transaction's outstanding tasks in a pop-up. Stack a status and a closing-date range onto the search, save it, and the daily chase becomes one click in your left menu.

The one thing that will quietly limit you is due dates. Tasks without them never reach the Tasks page at all, so if half your checklist is undated, half your reporting is invisible. That's worth fixing on the template before you build the habit.

When to Use This

- You're chasing paperwork on everything closing in the next two weeks.
- You want a per-agent list of what's still outstanding, to send out or to walk through.
- You used to see a transaction's missing items on hover and can't find where that went.
- Some of your tasks have no due dates, so they never show up on the Tasks page and you can't tell which files still owe them.
- You need the list as a spreadsheet for a compliance review or a broker meeting.

Why There Isn't a Report for This

Most people arrive asking for a report — a list of transactions with incomplete checklists, ideally broken out by agent, ideally emailed on Mondays. That report doesn't exist, and wanting it is completely reasonable.

A saved search does the same job with one advantage a report doesn't have: it's live. It re-runs the moment you click it, so the list is what's true right now rather than what was true when the report ran. And because it filters against whoever is looking, the same saved view handed to five agents shows each of them only their own files — one search, five personal lists, no assembly.

1. Filter the Transactions List to Incomplete Checklists

Open the *Transactions* page and click **More Search Options**. Set the checklist filter to **Incomplete**, then add the things that make the list actionable rather than exhaustive — a status, and a close-date range covering the window you're actually working. Incomplete checklists across all of history is a number; incomplete checklists closing in the next 14 days is a to-do list.

Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

See Transaction Search

> The filter answers "does this transaction have anything incomplete," not "is this particular checklist done." There's no way to search by which checklist — so if you're hunting one specific item, the task search is the better tool. See Find Every File Missing a Specific Form.

2. Hover the Completion Ratio to See What's Outstanding

The *Complete* column sits just to the right of *Status* on the Transactions list and shows how far along each transaction is. Hover the number and a pop-up lists that transaction's incomplete tasks — the actual answer, on the row, without opening the file.

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

See Completion Percentage

> Two things about that number worth knowing before you act on it: it spans *every* checklist on the transaction rather than one, and only admin-completed tasks count toward it — a task an agent has checked on their end is still outstanding here. If you remember getting this pop-up from the status, that's the mix-up: it has always lived on the completion ratio.

3. Save It as the Search You Click Every Morning

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

4. Give Undated Tasks a Far-Off Due Date

The Tasks page is built as a calendar, so it only carries tasks that have due dates. A task with none isn't hidden — it's not there, and no amount of filtering will surface it.

The fix is on the template: give those tasks a relative due date. If the task genuinely has no deadline, anchor it far out — 90 days after the close date is the usual choice — so it becomes visible and searchable without generating reminders anyone needs to read.

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

> A saved view returns rows only when every criterion it stores is satisfied at once — location, status, side, task visibility, and a due date. Change one of those in the account and the shortcut can come back empty without saying why. If a view that used to work goes quiet, take the criteria off one at a time until the rows come back.

5. Take the List Out as a Spreadsheet

For a compliance file or a meeting where you need the list on paper, download the search rather than screenshotting it. Shape the list first — filters, sort, columns — because what you download is exactly what you built.

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See Transaction Spreadsheet Downloads