Find Every File Missing a Specific Form

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

The files that have a document are a doc search. The files that don't are a task search — and that's the one compliance actually asks for.

Introduction

The state changed the disclosure and every open file needs the new version. Or a broker review is coming and the Consumer Notice has to be in all of them. Either way the question isn't who has it. It's who doesn't, across every agent, without opening files one at a time.

Pipeline answers that from two opposite directions. Global Search's **doc** parameter finds the transactions that contain a document. The Tasks page finds the transactions where the task for that document is still open: the same question inverted, and usually the one you want.

Whether the second search works at all comes down to a decision made months earlier: whether the document has a task, and whether that task has a name distinct enough to search for. Everything below is downstream of that.

When to Use This

- A form changed and you need every open file that hasn't got the new one yet.
- An audit or a broker review is coming and one document has to be in every file.
- You want to know which agents are behind on a specific item, not just which files are.
- You want one checklist's tasks without dragging in every other incomplete item in the account.
- You need every transaction that contains a particular form from a particular year.

> Looking for one person's work rather than one form's absence? A Pipeline task has no "assigned to" field, so one person's work is found two ways — by the @mention that names them, or by the transactions they're on. See [Find One Person's Tasks Across the Whole Account].

Why the Missing Ones Are the Harder Search

The natural move is to search for the document, and Pipeline will happily do it. But a document search can only ever return the files that have the thing. Compliance always asks the opposite question, and there's no "find files without" filter to turn the answer inside out.

The task is what makes an absence findable. An unchecked task is a positive record of something not done — it exists, it has a name, and it can be searched, which a missing document never can. That's why the naming step comes first here and why it isn't optional: the search you'll want in October is decided by how you named the task in March.

1. Give the Task a Name You Can Search For

Name the task after the specific document, not the category. *Consumer Notice* and *Form 35R* isolate cleanly; *Disclosure* will pull back a dozen unrelated tasks from every checklist in the account and bury the answer you wanted.

Set the name on the template rather than on one transaction, so every deal that gets the checklist carries the same searchable string. Consistency is the whole trick — a task named three different ways across three templates can't be searched as one thing.

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

2. Search the Tasks Page for the Files Still Missing It

Go to the *Tasks* page, click **Search**, and type part of the task name. Every open task that comes back is a file still missing that document — that's the list. Hover the people icons at the left of each row to see which agents are on that transaction, and you have the follow-up list too, without opening anything.

Narrow it further from there. Filtering to one side separates the listing-agreement chase from the sale-side chase, and overdue items come back highlighted red and sorted by date, so the worst offenders are already at the top.

Narrow the Tasks page to an exact set — search by task or transaction name, then filter by @mention, agent, due date, status, and more.

See Tasks Search

> Two limits worth knowing before you trust the count. Only *incomplete* tasks can be searched — there's no equivalent search for the ones already checked off. And the Tasks page carries only tasks that have due dates, so an undated task won't appear at all, which makes a short list look like good news when it's really a blind spot.

3. Give the Task a Due Date So It Reaches the Tasks Page

If the task you're hunting has no due date, this search can't find it — fix that on the template rather than on each transaction. A relative due date puts the task onto everyone's Tasks page automatically, on every deal, from then on.

When the item genuinely has no deadline, anchor it far out — 90 days after the close date is the usual choice. It stays findable and reportable without sending anybody a reminder they'd learn to ignore.

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

4. Search by Document Name for the Files That Have It

Sometimes the positive list is what you're after — pulling every file that contains a particular form for an audit sample, or checking which of last year's closings had the addendum. That one is Global Search: pick the **doc** parameter from the dropdown and type the document name. A partial name works, so *35R* finds *Form 35R Rev 2024*.

Then bound it. More Search Options adds a date range on top of the doc search, which is how you get "every file from 2015 containing this form" rather than every file ever.

Reach any transaction in your account from one box in the upper-left corner — type a name to look across every field at once, or pick a single field and search inside just that.

See Global Search

> The two searches don't add up to a complete picture on their own, because there's no way to filter transactions by which checklist they carry. If a form only applies to some deals, make sure the task only lands on those deals — the checklist that applies is the scope of the question.

5. Save the Search So the Next Sweep Is One Click

A form audit is never a one-time event. The state revises it again, a new agent joins, a file gets opened after you finished chasing. Save the search once and the next sweep is a click in your left menu rather than a re-typed query.

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