Not Applicable Tasks

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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.

Introduction

Checklists are built for the general shape of a deal, not the one in front of you. A cash sale never touches the financing steps. Marking those tasks Not Applicable takes them off the table for this transaction without claiming they were done.

It's a third state alongside open and complete, and the difference matters because the two say different things to everyone else reading the file. Complete says the work happened. Not Applicable says the work was never needed here. When an agent makes the mark it works as a note to the office rather than a decision: they're telling an admin the document isn't coming, and the admin decides what to do about it.

The benefit is a checklist that reads honestly. Anyone glancing at the file can see which items this deal actually needed and which it never did, instead of a column of empty boxes with no explanation. The thing that catches people out is expecting the mark to do more than it does. A struck-out task is still on the file until an admin resolves it, so if one keeps turning up on your list, nothing has gone wrong.

How It Works

Not Applicable is how you flag a task that doesn't fit a deal. An agent's mark is a signal an admin resolves; an admin's mark applies on the spot — either way the task is set aside without being counted as done.

What "Not Applicable" Means

A Not Applicable task is one that doesn't apply to this transaction. You're not saying the work was done — you're saying it was never needed here. It's a flag for your admin, not a way to clear the deal's progress: the task stays in the count until an admin resolves it.

Mark It From the Checklist With Shift + Click

You set a task Not Applicable right on the transaction's checklist: hold **Shift** and click the box to the left of the task, then choose **Not Applicable**. The task takes on a red struck-through mark instead of a checkmark. Both agents and admins can mark a task this way.

Agent Marks Wait; Admin Marks Apply

When an *agent* marks a task Not Applicable, it's a signal to the admin, not the final word — the admin still resolves it. When an *admin* marks a task Not Applicable, it applies right away, since the admin is the one who verifies the call.

How an Admin Resolves an Agent's Mark

There's no separate "approve" button. To accept an agent's Not Applicable mark, an admin either **checks the task off**, which leaves it struck through to show it was Not Applicable, or **deletes the task**. To reject it, the admin hovers over the task and clicks the [⍰] to un-mark it.

Not the Same as Complete

A completed task means the work is done and an admin verified it. A Not Applicable task means the work never applied. Both clear the task from what's still outstanding, but they say different things about the deal — so use Not Applicable only when a step truly doesn't fit, not as a shortcut to close out real work.

What It Does to Reminders and Progress

A Not Applicable mark sets a task aside — but it doesn't finish it, and Pipeline treats it that way. **The task still counts against the checklist's completion percentage.** An admin has to resolve it — check it off, or delete it — before the checklist can reach 100%. That's by design: the mark records the agent's judgment, and only an admin's action settles it. Until then it stays visible to admins for review, so it never quietly disappears.

Mark a Task Not Applicable (Agents)

> Flag a task that doesn't apply from the transaction's checklist, so an admin can resolve it.

> **Who Can Do This**: Agents assigned to the transaction, for tasks visible to them.

To mark a task Not Applicable as an agent:

1. Open the transaction and go to its *Checklists* area.
2. Hold the [Shift] key and click the box to the left of the task.
3. Click [Not Applicable].

The task takes on a red struck-through mark and drops off your *Tasks* page and reminders. It stays visible to an admin, who resolves it.

Mark a Task Not Applicable (Admins)

> Set a task aside as Not Applicable yourself — it applies right away, with no separate resolve step.

> **Who Can Do This**: The master admin, or admins with the *Fully manage checklists and templates* permission.

To mark a task Not Applicable as an admin:

1. Open the transaction and go to its *Checklists* area.

2. Hold the [Shift] key and click the box to the left of the task.

3. Click [Not Applicable].

Pipeline sets the task aside immediately — because you made the call as an admin, there's nothing left to resolve.

Resolve an Agent's Not Applicable Task (Admins)

> Accept a task an agent marked Not Applicable. There's no separate approve button — you either check it off or delete it.

> **Who Can Do This**: The master admin, or admins with the *Fully manage checklists and templates* permission.

To resolve an agent's Not Applicable task:

1. Open the transaction and find the task the agent marked Not Applicable on its checklist.

2. Confirm the step truly doesn't apply to this transaction.

3. To keep it on the record, click the box to the left of the task to check it off — it stays struck through to show it was Not Applicable. Or, to remove it entirely, delete the task.

Either way that settles the task: it stops appearing for review and stops sending reminders.

Reject an Agent's Not Applicable Mark (Admins)

> Send a task back if it does apply after all, clearing the Not Applicable mark.

> **Who Can Do This**: The master admin, or admins with the *Fully manage checklists and templates* permission.

To reject an agent's Not Applicable mark:

1. Open the transaction and hover over the task the agent marked Not Applicable.

2. Click the [?] that appears.

Pipeline clears the Not Applicable mark. If the task has a due date, it returns to the agent's *Tasks* page and daily reminders.

Not Applicable Tasks FAQ

A Not Applicable task is one you set aside because it doesn't apply to the deal — not open, not completed. Answers to the common questions about marking tasks Not Applicable, who can do it, and how it affects a checklist's progress. See Not Applicable Tasks FAQ.

Ways to Use Not Applicable Tasks

See Not Applicable Tasks at work inside a bigger job:

- Clear the Decks When a Deal Falls Through