Review Your Agents' Work Before It Counts as Done

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Your agents say a task is done. You decide when it actually is — and the agent-check is the handoff between the two.

Introduction

You're the one who answers for the file. When an audit lands or a deal gets questioned, "the agent told me it was uploaded" isn't an answer. You're expected to have looked. But you also can't be the only person allowed to touch a checklist, or you'll spend your week chasing paperwork instead of reviewing it.

Pipeline splits those two things apart. An agent checks a task to say *my part's done*, and it lands in your queue instead of closing out. Nothing counts as complete until you check it off yourself. Two people, two different marks, one clear line between them.

You don't have to police it. Once the checklists are built and your agents know to check their tasks, the work comes to you as a single list of what's waiting. No opening every deal to see what moved.

When to Use This

- You want agents to signal a document is uploaded without letting them close out compliance items.
- You review every required document before a file counts as complete.
- Your agents keep getting reminder emails for work they've already done.
- You want one list of what needs your approval, instead of opening each transaction to check.
- You want to know which documents an agent says are in, and which you've actually confirmed.

> Pipeline doesn't hard-block an agent from moving on until their documents are in — there's no gate to switch on. What this workflow gives you is a reliable signal and a review queue, not enforcement. Many offices add a final *Ready for Next Steps* task the agent checks as their handoff.

1. Decide Who Reviews and Who Gets Reviewed

This is the whole design, and it's one permission. Anyone *without* **Fully manage checklists and templates** can only agent-check — their marks queue for review. Anyone *with* it checks tasks off as complete, and nobody reviews them.

So the question isn't who's an agent and who's staff. It's who you want reviewed. Give the permission to the people doing the reviewing and withhold it from everyone whose work you want to see first — including office staff, if that's the call. Be deliberate: it's an admin-level grant that unlocks templates, tasks, due dates, and visibility across the location, not just the ability to complete a task.

Two things worth knowing before you set this up. Agents can never delete a task, whatever else they can do — that stays with full checklist management. And an assistant can agent-check without any admin grant at all, just by being on the transaction.

Permissions decide what someone can do with checklists: apply them to transactions, build and edit templates, and check tasks off. You set them per user, per location.

See Checklist Permissions

2. Put Every Document You Review on a Checklist

Pipeline builds your review queue from tasks, so anything without a task is invisible to it. One task per document you expect to see — the listing agreement, the disclosures, the addenda — is what turns a pile of uploads into a list you can work.

Name each task for the document itself rather than the step, so the queue reads as what's actually in your hands.

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

3. Ask Your Agents to Agent-Check as They Go

This is the only part that isn't a setting. Your agents need to know that uploading a document isn't the last step — checking its task is what tells you it's ready.

The pitch writes itself, because it's in their interest too: once they check a task, their reminders for it stop. Agents who don't check their tasks keep getting nudged about work they finished last week, and that's usually the complaint that gets them to adopt it.

When an agent checks off their own task, Pipeline flags it as agent-checked — done on the agent's end, waiting on an admin's approval.

See Agent Checked Tasks

4. Pull Up Everything Waiting on You

Rather than opening deals one at a time, work from the *Tasks* page and filter by *Agent Checked*. That's your queue: every task an agent has marked done and nobody has confirmed, across every transaction you can see.

Add an agent's name to the filter when you want one person's submissions — useful for a new agent you're watching closely, or a file that's drifting. Tasks an agent marked Not Applicable surface in the same filter, so you can clear those in the same pass.

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

5. Complete the Tasks That Pass

Open the document, confirm it's the right one and it's signed, then check the task off. Your check is what makes it complete — the agent's mark never does that on its own.

That second check doubles as your answer to the agent. They can see you received and approved their document without you sending a word about it.

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See Agent Checked Tasks

6. Send Back the Ones That Don't

Wrong form, missing signature, last year's version — remove the agent-check and the task goes back to open, which puts it back on the agent's *Tasks* page and back in their reminders.

Tell them why while you're there. Pipeline sends a comment on the document straight to the agent, and it stays visible when they re-upload, so the correction travels with the file instead of getting lost in your inbox.

When an agent checks off their own task, Pipeline flags it as agent-checked — done on the agent's end, waiting on an admin's approval.

See Agent Checked Tasks