Agent-Editable Due Dates

Last Modified on 11/10/2026 12:20 pm EST

Let agents change a task's due date themselves, task by task, so a deadline that moves on their side doesn't wait on an admin.

Introduction

Deadlines move. An inspection gets pushed, a lender needs two more days, and the agent hears about it first. By default only admins can change a task's due date, so the agent has to ask and wait, and the file shows the old date until someone gets to it.

You decide which dates agents can move. Agents keep the dates they own current, like an inspection or a walkthrough, and the deadlines your compliance depends on stay with your admins.

How It Works

You Choose Task by Task

Every task on a checklist template has a person icon beside it, labelled **Allow agents to change due date for this task**. It's off until you click it, so nothing changes for agents unless you decide it should.

Agents Change It From the Transaction

When the setting is on, an agent who can see the task can add or change its due date from the transaction's checklist, the same way an admin does.

The New Date Goes Everywhere

When an agent saves a new date, the task moves on the *Tasks* page, in daily reminder emails and on synced calendars for everyone who can see it.

Allow Agents to Change a Task's Due Date

Turn the setting on for a task in a checklist template.

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

To let agents change a task's due date:

1. Click [Gear] in the upper-right corner, then [Admin / Settings].
2. Open [Checklists] and click the template you want to edit.
3. Under **Document Names or Tasks to Track**, click the person icon next to the task.

Agents can now add or change that task's due date on transactions that get this checklist.

Change a Task's Due Date as an Agent

Add or move the date on a task your admin has opened up to you.

Who Can Do This: Agents who can see the task, when an admin has allowed it for that task.

To change a task's due date:

1. Open the transaction and find the task on its checklist.
2. Hover over the task and click the calendar icon.
3. Pick the new date.
4. Save your change.

The task shows its new date, and it moves on the *Tasks* page and in reminders for everyone who can see it.