Checklists & Tasks Overview

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A checklist holds everything a deal needs done. Tasks put each piece in front of the right person on the day it's due.

Introduction

Every transaction runs on the same kind of list: the documents to collect and the steps to finish before it closes. In Pipeline that list is a checklist, and each line on it is a task. An admin builds the list once as a template. After that it lands on each new deal already filled in, with its dates and its people set.

Each part has one job. The template sets the plan, the checklist on a transaction carries it out, and the Tasks page tells each person what's due. If you're an agent, you'll mostly work from your Tasks page and check off what you've finished. If you're an admin, you'll also build the templates and close out what your agents mark as done.

How It Works

A task starts on a template in your settings and ends when an admin checks it off.

It Starts as a Template

Templates live in your admin settings. Each one has a name, the locations that use it, and a list of tasks. Every task carries its own due-date rule, visibility, key-date flag and @mention, so those choices get made once instead of on every file.

The Template Lands on a Transaction

Pipeline can add a template on its own when a transaction's status, side or label matches a rule you set. Anyone with the permission can also add one by hand. Either way, the transaction gets its own copy. Changing the template later only reaches future deals, never the ones already open.

Access Decides Who Sees What

Whether someone sees a checklist comes down to whether they're on the transaction. Whether they see a single task comes down to that task's visibility. What they can do with checklists, such as apply one, edit a template or check a task off, is a permission you set per user and per location.

A Due Date Puts a Task in Front of People

A task with no date waits on its checklist until someone opens the transaction. Give it a date, typed in or counted from a date on the transaction, and it shows up on the Tasks page, in the daily reminder email and on any calendar you've synced. Change the close date and the tasks counted from it move too.

Checking a Task Off

An admin checks a task off to complete it. When an agent checks one, Pipeline marks it agent-checked instead. That's how an agent says their part is done. They stop being reminded about it, and the admin sees it on their Tasks

page, ready to close out. A task that doesn't fit this deal can be marked Not Applicable instead of pretending it's done.

Setting Up Checklists

- Adding a Checklist Template: Build a new checklist template from scratch — name it, pick the locations that use it, and load it with the tasks a deal depends on.
- Checklist Templates: Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.
- Document Names or Tasks to Track: The tasks on a checklist are the documents to collect and the steps to finish on a transaction.
- Task Due Dates: 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.
- Key Dates: Mark a task as a key date and its deadline flows onto coversheets, calendars, and your emails.
- Task Visibility: Decide who sees each task, so every person gets just the tasks that belong to them.
- Task @Mentions: Type @ and a name to highlight a task for the person who owns it, right where they'll look.
- Checklist Access: Access decides who can see a transaction's checklist and each task on it — and in Pipeline, that comes down to who's on the transaction and the visibility set on each task.
- Checklist Permissions: 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.

Using Checklists

- Applying a Checklist: Add a checklist to a single transaction by hand — for when it wasn't assigned automatically.
- Checklists Panel: The Checklists area is where a transaction's checklists live — expand them, reorder them, and set how they display.
- Pinned Checklist: Keep the checklist that matters most at the top of a transaction, even as new ones are added.
- Completion Percentage: See how far along a transaction is at a glance — shown as a percentage or a ratio of completed tasks.

Your Tasks & Reminders

- Tasks List: The Tasks page gathers every task with a due date across all your transactions in one place — shaped by the columns you show and the order you sort.
- Tasks Search: Narrow the Tasks page to an exact set — search by task or transaction name, then filter by @mention, agent, due date, status, and more.
- Agent Checked Tasks: 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.
- Completed Tasks: A completed task is one an admin has verified and checked off — and Pipeline can hide completed tasks so your checklists stay clean.
- Not Applicable Tasks: 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.

Automation for Checklists & Tasks

- Checklist Auto-Apply Rules: Set a checklist template to add itself to a transaction the moment that transaction's status, side, or label matches the rule you choose.

- Trigger Dates: Pick the date a deadline counts from, and Pipeline works the rest out on every transaction — for task due dates and scheduled messages alike.
- Daily Task Reminder Emails: Start each day knowing exactly what's due — Pipeline emails you a rundown of the tasks that are overdue, due today, and due tomorrow.

Ways to Use Checklists & Tasks

- Build a Family of Similar Checklists Without Starting Over
- Set Up Tasks That Only Apply to Some Deals
- Assign Every Task to the Right Person From the Template
- Get Agents to Fill In the Fields You Need
- Make a Long Checklist Readable
- Run Different Checklists for Each Office
- Build a Checklist Only Certain People Can See
- Give a TC Exactly the Checklist Access They Need
- Move Your Checklists Into Another Account
- Use Tasks to Track Key Dates on a Transaction
- Get a 30-Day Warning Before a Listing Expires
- Work Your Own Task List From One Page
- Find One Person's Tasks Across the Whole Account
- See Which Files Are Behind Without Opening Each One
- Find Every File Missing a Specific Form
- Send Outstanding Items to an Agent or a Client
- Review Your Agents' Work Before It Counts as Done
- Clear the Decks When a Deal Falls Through