Building Your Checklists

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The lists say what a deal is called and what a document is named. This is what your company does with them: who sees which paperwork, and the checklist that drives every deal to done.

Introduction

The category on a document decides who can open it, and a checklist template decides what a deal needs. Both sit on top of the lists you just agreed.

Build the template first, then the settings on its tasks. Due dates, visibility, key dates, and mentions travel with the checklist onto every deal, so what you set on the template is what every deal arrives carrying.

1. Decide Who Sees Which Paperwork

The category on a document, not on the transaction, is what decides who can open it. Agents defaulting everything to Private is the most common reason a broker cannot see a file.

Every document you file carries a permission category, and choosing it is what puts the right paperwork in front of the right people. You can change it afterwards, on one document or on thirty at once.

See Permission Category

2. Build the Checklist Your Office Works

One office-approved template beats everyone keeping their own. Change the template and the change reaches every deal that uses it from then on.

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates

3. Let the Dates Work Themselves Out

Write the rule once on the template, earnest money two calendar days after Acceptance, and every deal that gets the checklist arrives with the date filled in. Change the trigger date and the tasks move with it.

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. Give Each Task the Right Audience

An agent sees their share of the checklist and the back office sees theirs. Reminders follow visibility, so this is also what stops an agent being chased about a task that was never theirs.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility

5. Flag the Dates the Deal Turns On

Mark acceptance, inspection, and closing as key dates and they flow to coversheets, calendars, and the email autofill tag, instead of living only on the checklist.

Mark a task as a key date and its deadline flows onto coversheets, calendars, and your emails.

See Key Dates

6. Mark Whose Task It Is

Type @ and a name or a role in the task name and it is highlighted for that person wherever they look. Pair it with the @mention visibility type to show the task to them alone.

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See Task @Mentions

7. Let the Right Checklist Arrive on Its Own

A rule watches for a status, side or label and adds the template when it matches. Several short checklists that arrive at the right moment beat one long one that arrives all at once.

Set a checklist template to add itself to a transaction the moment that transaction's status, side, or label matches the rule you choose.

See Checklist Auto-Apply Rules