

# Add a Checklist to a Transaction

## SUMMARY

Learn how to manage and view checklists and tasks on transactions.

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## Introduction

*Checklists* help admins and agents stay in compliance by tracking tasks that need to be completed on a transaction. *Tasks* are items on a checklist that represent documents or actions that need to




be uploaded or completed.

*Checklist Templates* are set up by an admin for use across the company's transactions. Once a *Checklist Template* is set up, it can be added to transactions manually or, preferably, automatically based on rules defined by an admin.

Once a checklist has been added to a transaction, it can be refined and altered to be specific to the transaction it was added to (and will not impact the template it was based on).

Agents and admins may check off tasks on transactions to track and communicate the status of each task. Tasks can only be checked as fully completed by admins, while agents can mark tasks as done (*Agent-checked*) or not applicable (N/A) to indicate they're ready for an admin's review.

Here is an example of a typical task office's task workflow:

- An agent marks a task as either done  (*Agent-checked*) or Not Applicable  (N/A).
- An admin [filters for Agent-Checked tasks on the Tasks page](#) to review tasks marked as done or not applicable.
- From the *Tasks Page* or while viewing a transaction, an admin checks a task to mark it as completed  or un-marks the agent's check if they feel the task hasn't been fulfilled.

Once an admin checks a task, the task is considered fully complete and will update the transaction's *Checklist Completion Status*.

## Manage Transaction Checklists

[Add a Checklist](#)

**Who can do this?** Agents and admins with permission to *Assign checklist templates to transactions*.

When a checklist isn't [auto-assigned](#) to a transaction, it can be added manually.

 3:18

To manually add a checklist to a transaction:

- 1 From the transaction's *Checklists* area, **click** [\[ \]](#).

The screenshot shows a web application interface for managing real estate transactions. At the top, there is a search bar and navigation tabs for Transactions, Tasks, Unassigned, Unreviewed, Reports, and Reference. The main content area is divided into two columns. The left column contains a sidebar with options: View Transaction, Edit Transaction, Upload Docs, Assign Docs, New Offer, Transaction History, Received Emails (0), and Download Transaction. Below these is a 'Checklists' section with a '+' icon in a red box and a red arrow pointing to it. The right column displays transaction details for '234 Arrow Road', including status (Pending), MLS number (985674563), seller (G. Smith), buyer (B. Simpson), and listing agents (Betty Stone).

- 2 Select the desired checklist from the dropdown list. Your selected checklist will be added to the transaction.

The best way for checklists to be added to transactions is for an admin to set the **Checklist Template** to be automatically added based on a transaction's **Status**, **Label**, and/or **Side**. [Learn how to Automatically Assign Checklist Templates to Transactions →](#)

### Edit a Checklist Title

**Who can do this?** Admins with permission to *Fully manage checklists and templates*.

To edit the title of a checklist:

- 1 From the transaction's *Checklists* area, **hover over the checklist and click the [pencil]**.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

**234 Arrow Road** Added on Feb 3, 2022 by Hollis Holcomb  
Last updated Feb 8, 2022 by Hollis Holcomb

Email docs and notes to this transaction: [4562059-III861-TX-2753@docs.paperlesspipeline.com](mailto:4562059-III861-TX-2753@docs.paperlesspipeline.com)

**General**

**Status:** Pending **Liste**  
**MLS #:** 985674563 **Acci**  
**Side:** Listing **Clos**  
**Location:** Paperless Real Estate

**Buyer & Seller**

**Seller:** G. Smith  
**Buyer:** B. Simpson

**Sale & Commission**

**List Price:** \$356,000  
**Sale Price:** \$350,000

**Contingency Dates**

**Earnest Money Deposit Date:** Jan 4, 2022

**More Info**

Lockbox - 456789

**Listing Agents**

Betty Stone [✉ hollis+tcbstone@paperlesspipelin](mailto:hollis+tcbstone@paperlesspipelin)

**Checklists** 72% ✓

**Pending**

- Cooperating broker's commission agreement 2/1
- Commission disbursement authorization 2/10
- Extension of closing addendum (if applicable)
- Repair addendum (if applicable)
- Buyer Preapproval 2/1
- Show completed tasks →

Add doc name or task

+ Listing

2 Update the *Checklist Title*.

3 Click [Save] to update the title.

## Reorder Checklists

**Who can do this?** Admins with permission to *Fully manage checklists and templates*.

To reorder checklists on a transaction:

1 From the transaction's *Checklists* area, **click and hold the *Title* of a checklist, then drag it to your desired position** in the *Checklists* area.

**813 Briarcliff** Added on Apr 27, 2020 by Hollis Holcomb  
Last updated 1 minute ago by Hollis Holcomb  
Email docs and notes to this transaction: [4568202-111443-TX-2055@docs.paperlesspipeline.com](mailto:4568202-111443-TX-2055@docs.paperlesspipeline.com)

**General**

Status: Listed Listed On: Apr 1, 2020 coversheet  
 MLS #: 04270247 Accepted On: Apr 8, 2020  
 Label: Residential Closed On: May 31, 2020  
 Side: Listing & Buying  
 Location: Old Pine

**Seller & Buyer**

Sale & Commission

Sale Price: \$500,000 Total Commission: \$200,000

**Listing Agents**

Kristian Keane [kristiankeane@gmail.com](mailto:kristiankeane@gmail.com) 456-456-5555 987-854-3210  
 Carlisle Lilly [carlisle@paperlesspipeline.com](mailto:carlisle@paperlesspipeline.com)

**Buying Agents**

Kristian Agent [carol+agent@paperlesspipeline.com](mailto:carol+agent@paperlesspipeline.com) 567-567-5678  
 Rosemary Laucala [rosemarylaucala@paperlesspipeline.com](mailto:rosemarylaucala@paperlesspipeline.com) 555-555-5555

**5 Contacts**

Monta Cupcake, Referrer [monta+cupcake@paperlesspipeline.com](mailto:monta+cupcake@paperlesspipeline.com) 2225552222  
 Cupcake Central  
 April is a regular at Cupcake Central. When they learned she wanted to move, they referred her to us!

Odysseus Davis, Property Inspector [hollis+odie@paperlesspipeline.com](mailto:hollis+odie@paperlesspipeline.com) (237) 912-2639  
 Odie's Property Inspection Company / 717 Main Street

## Delete a Checklist

Who can do this? Admins with permission to Fully manage checklists and templates.

To delete a checklist on a transaction:

- 1 From the transaction's **Checklists** area, hover over the checklist and click the [X] that appears to the right.

**234 Arrow Road** Added on Feb 3, 2022 by Hollis Holcomb  
Last updated Feb 8, 2022 by Hollis Holcomb  
Email docs and notes to this transaction: [4562059-111861-TX-2753@docs.paperlesspipeline.com](mailto:4562059-111861-TX-2753@docs.paperlesspipeline.com)

**General**

Status: Pending Liste  
 MLS #: 985674563 Acci  
 Side: Listing Clos  
 Location: Paperless Real Estate

**Buyer & Seller**

Seller: G. Smith  
 Buyer: B. Simpson

**Sale & Commission**

List Price: \$356,000  
 Sale Price: \$350,000

**Contingency Dates**

Earnest Money Deposit Date: Jan 4, 2022

**More info**

Lockbox - 456789

**Listing Agents**

Betty Stone [hollis+ tcbstone@paperlesspipelin](mailto:hollis+ tcbstone@paperlesspipelin)

- 2 Click [delete] to confirm. The checklist will be deleted from the transaction.

Deleting a checklist from a transaction will only delete the checklist from that particular transaction and will not impact the *Checklist Template*.

## Manage Transaction Tasks

### Add a Task

**Who can do this?** Admins with permission to *Fully manage checklists and templates*.

To add a new task to a checklist:

- 1 From the bottom of your desired checklist in the transaction's *Checklists* area, click [Add Doc Name or Task].

The screenshot displays a web application interface for managing a transaction. On the left, a sidebar menu includes options like 'View Transaction', 'Edit Transaction', 'Upload Docs', and 'Checklists'. The 'Checklists' section is expanded, showing a 'Pending' checklist with 72% completion. A red box highlights the 'Add doc name or task' button at the bottom of the checklist. The main content area shows transaction details for '234 Arrow Road', including status (Pending), MLS # (985674563), side (Listing), and location (Paperless Real Estate). It also lists the seller (G. Smith) and buyer (B. Simpson), along with sale and commission prices. A red arrow points from the 'Add doc name or task' button to the 'Earnest Money Deposit Date' field.

- 2 Type the *Task Name*.
- 3 Click [Save] to add the new task.

You can add URL links to tasks. Links added to tasks are clickable and will open in a new

window.

## Edit a Task's Name

**Who can do this?** Admins with permission to *Fully manage checklists and templates.*

To edit the name of a task:

- 1 From the transaction's *Checklists* area, **hover over your desired task, and click the [pencil].**

The screenshot shows the 'Checklists' section for a transaction titled '234 Arrow Road'. The 'Buyer Preapproval' task is highlighted with a red box and a red arrow pointing to the pencil icon. The task is currently 2/11 completed. The interface also shows a search bar, navigation tabs (Transactions, Tasks, Unassigned, Unreviewed, Reports, Reference), and various transaction details like Status (Pending), MLS # (985674563), and List Price (\$356,000).

- 2 Type the updated *Task Name*.
- 3 Click [Save] to update the task.

## Edit a Task's Visibility

**Who can do this?** Admins with permission to *Fully manage checklists and templates.*

To change who will have access to view and receive reminders about a task:

- 1 From the transaction's *Checklists* area, **hover over the task and click the [eye].**

- 2 Select the appropriate *Task Visibility* option. [Learn more about Visibility Types](#) →
- 3 Click [Set Task Visibility]. Now, only those that have access to the *Visibility Type* you selected will be able to view the task.

The best way to set *Task Visibility* for a task is to set it on the *Checklist Template*. That way, every time the template is used to add a checklist to a transaction, its tasks will already have their visibility set. [Learn how to Set Task Visibility on Checklist Templates](#) →

## Edit a Task's Due Date

### Who can do this?

- Admins with permission to *Fully manage checklists and templates*.
- Agents can edit the due date of tasks set to *Allow Agents to Change a Task's Due Date*

Due dates can be added to tasks as an *Absolute Due Date* - like Tuesday April 12th - or a *Relative Due Date*, which is a due date relative to certain trigger activities.

To set a task's due date:

- 1 From the transaction's *Checklists* area, **click the task's due date**. Or, if a date hasn't been assigned to the task, **hover over the task and click the [calendar]**.



2 From the pop-up, you can either assign a specific *Absolute Date* or a *Relative Due Date*:

- To assign a specific date, select **[Absolute Date]**, then select a date.

- Or, to assign a *Relative Due Date* date based on important dates related to the transaction, select [Relative Date], set your date rule, then [Set Date Rule] [Learn more about Relative Due Dates](#) →

The best way for due dates to be added to tasks is to set the task's *Relative Due Dates* on the *Checklist Template*. When a *Checklist Template* is set up with *Relative Due Dates* then added to a transaction, its tasks will already have their due dates set. [Learn how to Add Relative Due Dates on Checklist Templates](#) →

## Reorder Tasks

**Who can do this?** Admins with permission to *Fully manage checklists and templates*.

To reorder tasks on a transaction:

- 1 From the transaction's *Checklists* area, **click and hold the Name** of a task, then **drag it to your desired position within the checklist**.

The screenshot shows a web interface for a transaction titled "813 Briarcliff". On the left, there is a "Checklists" sidebar with two sections: "Pending checklist" and "Listing checklist". The "Pending checklist" includes items like "Executed Counter", "Purchase contract", and "Preliminary title report". The "Listing checklist" includes items like "Seller's Property Disclosure" (due 4/22), "Lead-based Paint Disclosure" (due 4/29), "Well water Disclosure" (due 5/25), "Lockbox Keys" (due 6/1), "Listing Agreement" (due 4/14), "Mold Disclosure", "MLS Information" (due 5/12), "Agency Disclosure" (due 4/22), and "Financial Addendum" (due 5/4). The main content area shows transaction details: "Sale & Commission" with a "Sale Price: \$500,000" and "Total Commission: \$200,000"; "More Info" with a "Lock Box:" field; "Listing Agents" including Kristian Keane and Carlisle Lilly; "Buying Agents" including Kristian Agent and Rosemary Laucala; and "5 Contacts" including Monta Cupcake, Referrer and Cupcake Central.

## Delete a Task

Who can do this? Admins with permission to Fully manage checklists and templates.

To delete a task from a transaction:

- 1 From the transaction's *Checklists* area, hover over the task and click the [X] that appears to the right.

The screenshot shows a web interface for a transaction titled "234 Arrow Road". On the left, there is a "Checklists" sidebar with a "72%" completion indicator and a "Pending" section. The "Pending" section includes items like "Cooperating broker's commission agreement" (2/1), "Commission disbursement authorization" (2/10), "Extension of closing addendum" (if applicable), "Repair addendum" (if applicable) (2/1), and "Buyer Preapproval" (2/1). A red arrow points to a small "X" icon next to the "Repair addendum" task. The main content area shows transaction details: "General" with "Status: Pending", "MLS #: 985674563", "Side: Listing", and "Location: Paperless Real Estate"; "Buyer & Seller" with "Seller: G. Smith" and "Buyer: B. Simpson"; "Sale & Commission" with "List Price: \$356,000" and "Sale Price: \$350,000"; "Contingency Dates" with "Earnest Money Deposit Date: Jan 4, 2022"; "More Info" with "Lockbox - 456789"; and "Listing Agents" including Betty Stone.

2 Click [Delete] to confirm.

Deleting a task from a transaction will only delete the task from that particular transaction and will not impact the *Checklist Template*.

## Manage Your Checklist View

**Who can do this?** Anyone with access to view a transaction will see any tasks set to a *Visibility Type* they have access to view.

On any transaction, view tasks assigned to the transaction from the *Checklists* area in the left menu. You will be able to view any task set to a *Visibility Type* you have access to view.

The screenshot displays the Paperless Pipeline interface for a transaction titled "234 Arrow Road". The left sidebar menu includes options like "View Transaction", "Edit Transaction", and "Checklists". The "Checklists" menu item is highlighted with a red box and a red arrow. The main content area shows transaction details, including "Status: Pending", "MLS #: 985674563", and "Listed On: Dec 1, 2021". The "Checklists" section shows a list of tasks with completion status, such as "Cooperating broker's commission agreement" (2/21) and "Buyer Preapproval" (2/11). A "72%" completion status is shown in the top right of the checklist area.

Next to any checklist, click [ ] to show or [ ] to hide the checklist. Pipeline will remember your preference to expand or collapse the checklist whenever you return to the transaction later.

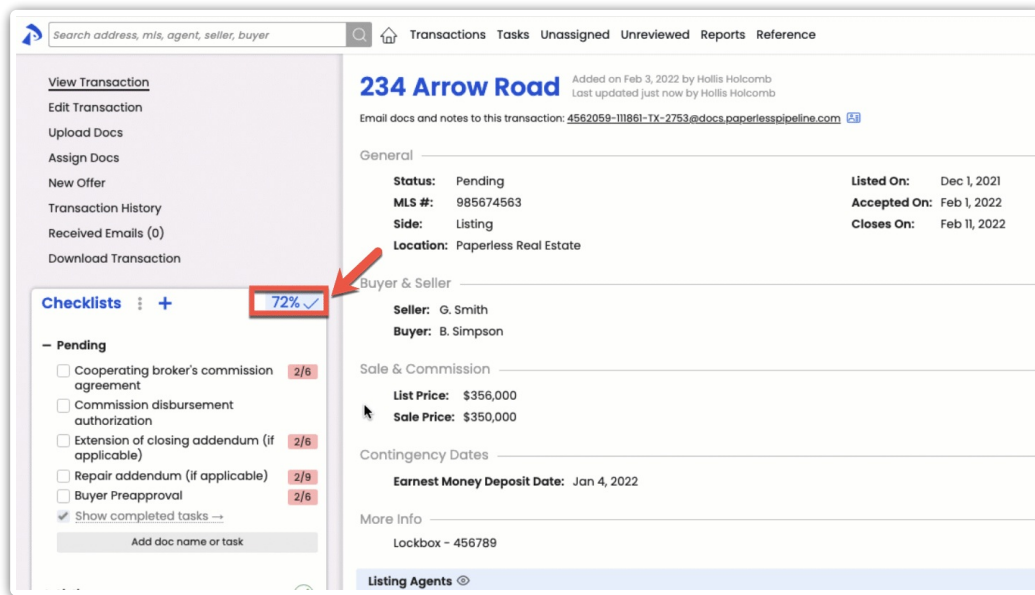
## Show Completion Status as Percentage or Ratio

Use the *Checklist Completion Status* in the upper-right corner of the checklists area to quickly check the status of a transaction's completed tasks (tasks completed by an admin).

Opt to show the *Checklist Completion Status* as a percentage or ratio.

To show the *Completion Status* as a percentage or ratio:

- 1 From the top right corner of the transaction's Checklists area, click the **Checklist Completion** [Percentage ✓] or [Ratio ✓] to toggle between percentage and ratio.



Pipeline will remember your preference to show the *Checklist Completion Status* as a percentage or ratio whenever you return to the transaction later.

## Turn On Checklist Scrolling

*Checklist Scrolling* lets you choose what tasks and parts of the transaction you're viewing at any given time by allowing you to scroll through the checklists separately from the main transaction page.

*Checklist Scrolling* is useful for managing a long list of tasks, for dragging tasks to messages, and for using [Smart Checklists](#) to identify related docs and tasks.

To turn on *Checklist Scrolling*:

- 1 From the top of the transaction's *Checklists* area, click [ ⋮ ].
- 2 Check the box next to [Checklist scrolling].

The screenshot shows a web interface for a transaction titled "813 Briarcliff". On the left, there is a sidebar with navigation options like "View Transaction", "Edit Transaction", "Upload Docs", etc. Below this is a "Checklists" section with a dropdown menu open. The menu items include "Sort by date" and "Hide @mention". The "Checklist scrolling" option is highlighted with a red box and a red arrow points to it. The main content area on the right displays transaction details such as "Status: Listed", "MLS #: 04270247", "Label: Residential", "Side: Listing & Buying", and "Location: Old Pine". It also lists "Listing Agents" (Kristian Keane and Carlisle Lilly) and "Buying Agents" (Kristian Agent).

3 Click [Done].

Pipeline will remember your *Checklist Scrolling* preference whenever you return to any transaction later.

## Sort Tasks by Due Date

By default, checklist tasks on transactions are shown in the original order set by an admin on the *Checklist Template*.

If you prefer, sort your view of tasks by due date instead.

To sort checklist tasks by due date:

1 From the top of the transaction's *Checklists* area, click [⋮].

2 Check the box next to [Sort by date].

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

**234 Arrow Road** Added on Feb 3, 2022 by Hollis Holcomb  
Last updated just now by Hollis Holcomb

Email docs and notes to this transaction: [4562059-III861-TX-2753@docs.paperlesspipeline.com](mailto:4562059-III861-TX-2753@docs.paperlesspipeline.com)

**General**

**Status:** Pending **Liste**  
**MLS #:** 985674563 **Acco**  
**Side:** Listing **Clos**  
**Location:** Paperless Real Estate

**Buyer & Seller**

**Seller:** G. Smith  
**Buyer:** B. Simpson

**Sale & Commission**

**List Price:** \$356,000  
**Sale Price:** \$350,000

**Contingency Dates**

**Earnest Money Deposit Date:** Jan 4, 2022

**More info**

Lockbox - 456789

**Listing Agents**

Betty Stone [✉ hollis+tcbstone@paperlesspipelin](mailto:hollis+tcbstone@paperlesspipelin)

**Checklists** 72% ✓

Checklist scrolling

**- Pending**

**Sort by date**

Buyer Pre

Extension applicab 2/6

Cooperating broker's commission agreement 2/6

Repair addendum (if applicable) 2/9


Commission disbursement authorization

Show completed tasks →

Add doc name or task

+ Listing

3 Click [Done]. Tasks will appear in order by their due date.

 Pipeline will remember your sort preference whenever you return to any transaction later.

## Hide @mention

Make task names easier to read by hiding any @Mention text on checklists. [Learn more about @Mention](#) →

To hide @Mention text on tasks:

- 1 From the top of the transaction's Checklists area, click [ : ].
- 2 Check [Hide @mention].




- 3 Click [Done]. The @Mention text will be hidden from your view of checklists on all transactions.

Pipeline will remember your preference to hide or show @Mention text whenever you return to any transaction later.

## Check Off Tasks on a Transaction

Agents and admins may check off tasks on transactions to track and communicate the status of each task. Tasks can only be checked as fully completed by admins, while agents can mark tasks as done (*Agent-checked*) or not applicable (N/A) to indicate they're ready for an admin's review.

Here is an example of a typical task office's task workflow:

- An agent marks a task as either done  (*Agent-checked*) or Not Applicable  (N/A).
- An admin filters for Agent-Checked tasks on the Tasks page to review tasks marked as done or not applicable.
- From the *Tasks Page* or while viewing a transaction, an admin checks a task to mark it as completed  or un-marks the agent's check if they feel the task hasn't been fulfilled.

Once an admin checks a task, the task is considered fully complete and will update the



transaction's *Checklist Completion Status*.

## Agents

Agents check off tasks to communicate to admins when they've finished a task or when the task is not applicable on a transaction.

When an agent marks a task as done or not applicable, the task will no longer appear in the agent's *Daily Task Reminder* email or on their *Tasks List*. The tasks will continue to appear in those two areas for the admin.

## Mark a Task as Done (Agent-checked)

### Who can do this?

- Agents
- Admins without permission to *Fully manage checklists and templates*.

For agents to *Agent-check* a task:

- 1 From the transaction's *Checklists* area, **check the box to the left of the task**. The task will be agent-checked.

The screenshot displays a web interface for a real estate transaction. On the left, a sidebar menu includes options like 'View Transaction', 'Edit Transaction', 'Upload Docs', and 'Checklists'. The 'Checklists' section is expanded, showing a list of tasks under the 'Pending' category. A red box highlights the checkbox for 'Extension of closing addendum (if applicable)', which is currently checked. To the right of the sidebar, the main content area shows the transaction details for '234 Arrow Road', including the status 'Pending', MLS number '985674563', and listing agent 'Betty Stone'. The interface also shows a progress indicator for the checklist at 78% completion.

[Learn more about agent-checked tasks →](#)

## Admin Workflow Tip

When reviewing tasks marked as done by agents, admins may:

- Check off the task to mark it as complete.
- Un-mark the task as *Agent-checked* by clicking the [X] that appears when hovering over the task. If the un-marked task has a due date, it will start being included in the agent's *Daily Task Reminders* or on their *Tasks List*.

## Set a Task as Not Applicable (N/A)

### Who can do this?

- Agents
- Admins without permission to *Fully manage checklists and templates*.

For agents to mark a task as not applicable:

- 1 From the transaction's *Checklists* area, hold the [Shift] key on your keyboard and click the box to the left of the task.
- 2 When the agent task options appear, click [Not Applicable], then [Done]. The task will be set as not applicable.

The screenshot shows a web application interface for a real estate transaction. On the left, a 'Checklists' sidebar is visible, containing two sections: 'Pending checklist' and 'Listing checklist'. The 'Listing checklist' section has several items with completion counts: 'Lead-based Paint Disclosure (if applicable)' (4/29), 'Lockbox Keys' (6/1), 'Listing Agreement' (4/14), 'Mold Disclosure' (5/12), and 'MLS Information' (5/12). A blue callout box with a mouse cursor points to the 'Lead-based Paint Disclosure' checkbox, with the text 'Shift + click' overlaid. The main content area shows transaction details for '813 Briarcliff', including 'Side: Listing & Buying', 'Location: Old Pine', 'Sale Price: \$500,000', and a list of agents (Listing Agents and Buying Agents) with their contact information.

## Admin Workflow Tip

When reviewing tasks set as not applicable by agents, admins may:

- Check the task to mark it as complete. Tasks marked as not applicable by agents will remain

crossed out to indicate they were marked as N/A, even after fully checked.

- Delete the task to remove it from the transaction completely.
- Un-mark the task as N/A by clicking the [X] that appears when hovering over the task. If the un-set task has a due date, it will start being included in the agent's *Daily Task Reminders* or on their *Tasks List*.

## Admins

For a task to be considered fully complete, it must be checked as complete by an admin.

Once an admin checks a task, the task is considered fully complete and will update the *Checklist Completion Status* of the transaction.

## Complete a Task

**Who can do this?** Admins with permission to *Fully manage checklists and templates*.

For admins to mark a task as fully complete:

- 1 From the transaction's *Checklists* area, check the box to the left of the task.

The screenshot shows a web interface for a real estate transaction. At the top, there is a search bar and navigation tabs: Transactions, Tasks, Unassigned, Unreviewed, Reports, and Reference. The main content area is titled '234 Arrow Road' and includes details like 'Added on Feb 3, 2022 by Hollis Holcomb' and 'Last updated just now by Betty Stone'. Below this, there are sections for 'General', 'Buyer & Seller', 'Sale & Commission', 'Contingency Dates', and 'More Info'. On the left side, there is a 'Checklists' panel with a '78%' completion indicator. A red arrow points to a checked checkbox for the task 'Cooperating broker's commission agreement'. Other tasks in the list include 'Commission disbursement authorization', 'Extension of closing addendum (if applicable)', 'Repair addendum (if applicable)', and 'Buyer Preapproval'. The 'Listing Agents' section at the bottom identifies Betty Stone as the listing agent.

Admins may also check off tasks directly on the *Tasks Page*. [Learn how to Check Off Tasks on the Tasks Page →](#)

