Manage Key Dates

SUMMARY

Learn how to use *Key Dates* to designate tasks in your *Checklist Templates* as important timeline dates that can be displayed on your transaction coversheets, synced to your calendar app, and autofilled into emails and message templates.

IN THIS ARTICLE

Introduction

Checklists Tasks help you track required documents, to-do items, and important dates. Designating tasks as *Key Dates* in Paperless Pipeline allows you to take advantage of added features such as:

- Including a timeline of *Key Dates* on transaction coversheets
- Smartly syncing only *Key Dates* to your calendar app
- Easily inserting a transaction's *Key Dates* into emails using a simple autofill tag

Who Can Do This?

Admins with permissions to "Fully manage checklists and templates" may designate a task as a *Key Date*.

How To

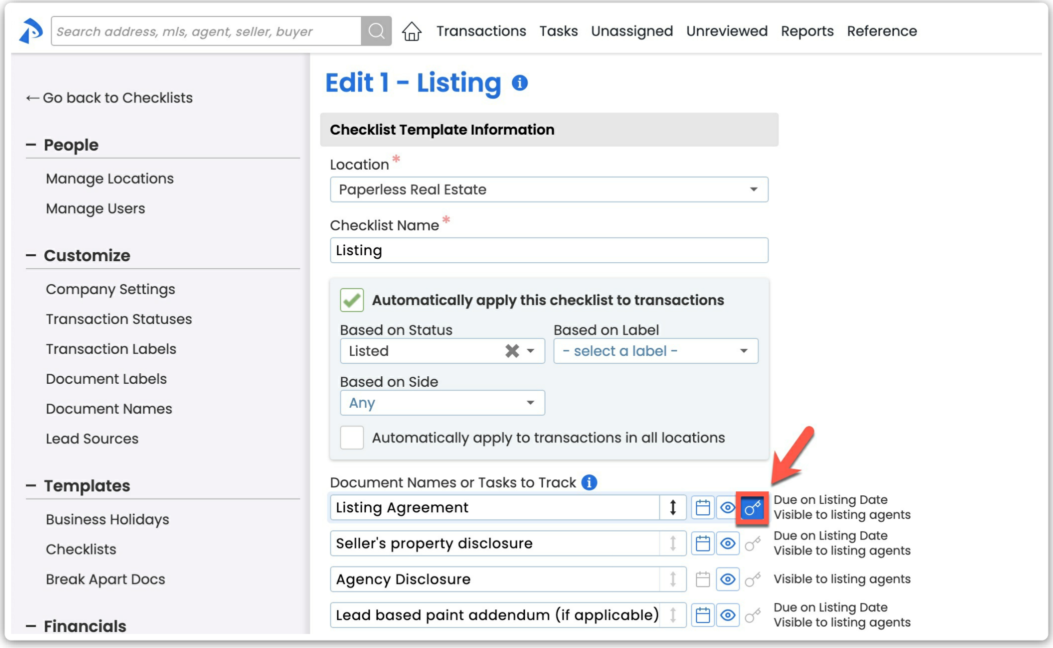
Designate a Task on a Checklist Template as a Key Date

To designate a task on a *Checklist Template* as a *Key Date*:

1. **Add a new *Checklist Template* or edit an existing one.** Learn how to Manage Checklist

Templates →

2. **Click the [key] next to the task you would like to designate as an important *Key Date*.** Once the *Key Date* is enabled, the task's key will turn blue.



3. **Click [Save Template]** to save your updates.

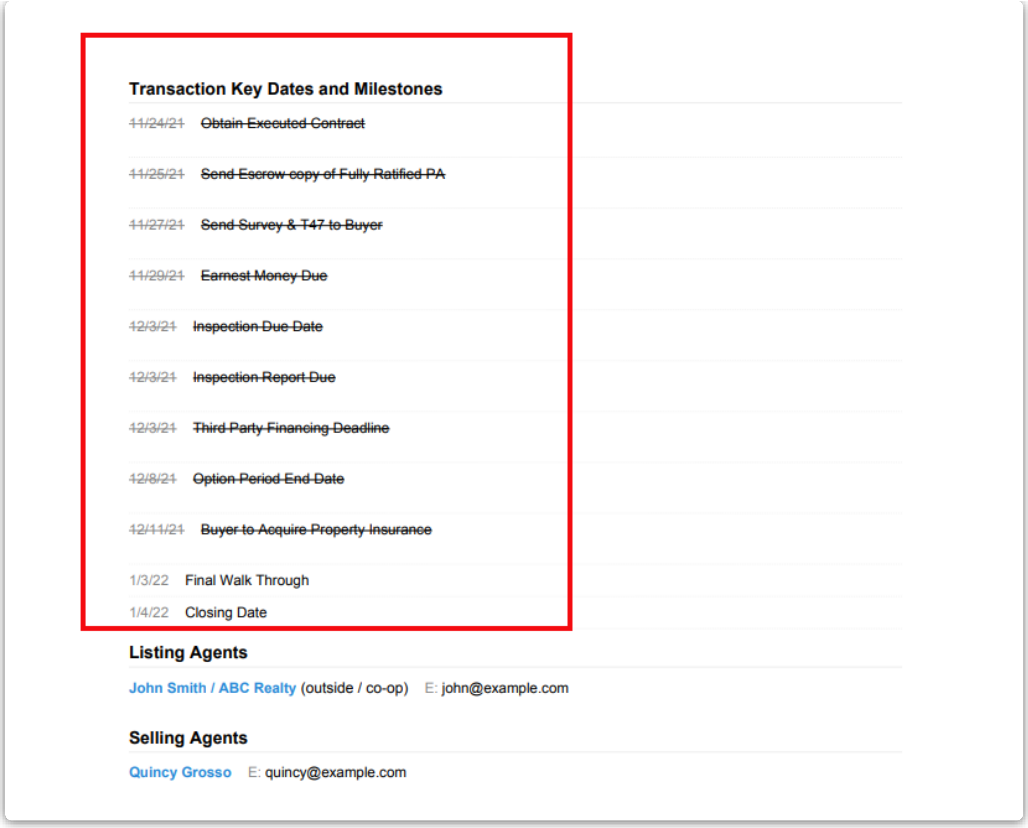
Automatically Include Key Dates on Coversheet

Optionally, *Key Dates* can be automatically displayed on transaction coversheets in a *Transaction Key Dates and Milestones* section. Both incomplete and completed *Key Dates* will be displayed.

To display *Key Dates* on your transaction coversheets:

1. **Go to Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
2. **Select the checkbox next to [Include key dates on coversheet]**
3. **Click [Save Settings]** to save your updates.

Here is an example of *Key Dates* included on a transaction coversheet:

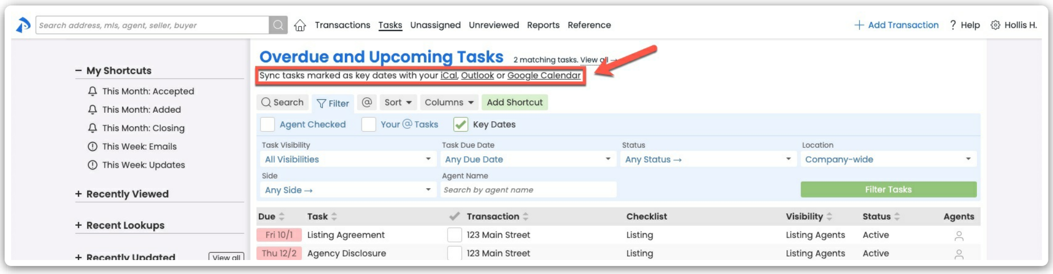


Sync Key Dates to Calendar

To keep track of *Key Dates* in your calendar app outside of Pipeline, sync *Key Dates* to your preferred calendar.

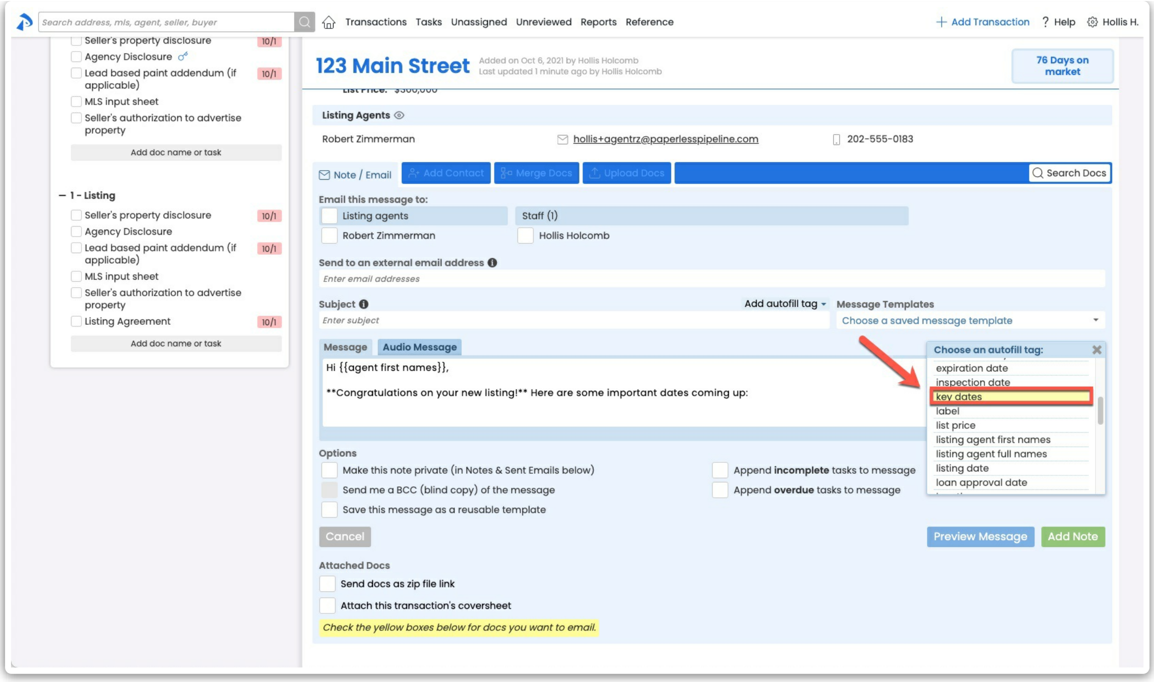
To sync *Key Date* tasks to your calendar:

1. On the Tasks page, **filter tasks by *Key Date*.** Learn how to Filter Tasks by Key Date →
2. Once your list of *Key Date* tasks appear, **select the link for your desired calendar app.** Learn how to Sync and Unsync Tasks with Calendars →



Autofill Key Dates into Emails and Message Templates

Use the `{{key dates}}` *Autofill Tag* to quickly share a transaction's important key dates and automatically insert them into emails and message templates. Learn how to Use Autofill Tags →



When you use the *Key Dates* tag, both complete and incomplete tasks designated as *Key Dates* from your transaction's checklist(s) will replace the `{{key dates}}` tag.