

Use Tasks to Track Dates on Transactions

Use *Checklist Tasks* to track dates that aren't covered by regular transaction dates and to help agents and admins keep track of important dates.

Who Can Do This? Admins with permission to *Fully Manage Checklists and Templates* can set up date *Tasks*. Agents and admins can take advantage of them throughout Pipeline.

Purpose

Tracking dates with *Checklist Tasks*:

- Helps track additional dates on the transaction when regular *Transaction Dates*, *Optional Transaction Date Fields*, and *Custom Date Fields* are not a good fit.
- Helps agents and admins stay on top of important dates on transactions, the *Tasks* page, in *Daily Task Reminders*, and in other places they already get reminded about *Tasks*.

How It Works

To track dates using *Tasks*, an admin must first set them up in *Checklist Templates*. Setting up dates as *Tasks* allows them to be used as additional date fields on transactions and gives them their own special powers.

Setting up transaction dates as *Tasks* allows you to take advantage of the following *Task* features:

- **Automatically Applied Checklists:** Track the proper transactions and make the tracking process as hands-free as possible.
- **@Mention:** Highlight the date for certain users or groups.
- **Relative Due Dates:** Automatically calculate the date when it is related to a date on the transaction.
- **Task Visibility:** Show the date only to certain people.
- **Key Dates:** Take advantage of transaction timeline features.
- **Agent-editable Due Dates:** Allow agents to update the date

Everyone on your team can enjoy the benefits of date *Tasks* once an admin sets them up and they start being added to transactions.

Set Up Date Tasks

To set up a *Task* to track a date:

- 1 Create a new *Checklist Template* or edit an existing one where the date can be added. [Learn more about Managing Checklist Templates](#) →
- 2 Make sure the *Checklist Template* is set to automatically apply to the appropriate transactions, based on *Location(s)*, *Status*, *Side(s)* and / or *Label(s)*. [Learn more about Automatically Applying Checklist Templates](#) →
- 3 Add a *Task* for the date to the *Checklist Template*. For example, to track the "Staging Date," enter "Staging Date."

The screenshot shows the 'New Checklist Template' form. The 'Document Names or Tasks to Track' section is as follows:

Document Name	Priority	Visibility	Due Date
Listing Agreement	1	Visible to listing agents	Due on Listing Date
Seller's Disclosure Notice	1	Visible to listing agents	Due 5 calendar days after Listing Date
Order Photography @tc	1	Visible to listing agents	Due 5 calendar days after Listing Date
Staging Date	1	Visible to listing agents	

4 Optimize the date *Task*:

- **@Mention** specific people or groups in the *Task* to highlight the date for them. [Learn more about @Mention](#) →
- Set a **Relative Due Date** to automatically calculate the date on transactions when the date is

typically based on another transaction date.

[Learn more about Relative Due Dates →](#)

- **Set a *Visibility Type*** to show the date only to certain people.

[Learn more about Task Visibility →](#)

- **Designate the *Task* as a *Key Date*** to take advantage of transaction timeline features.

[Learn more about Key Dates →](#)

- **Allow agents to update the date** once it's been added to transactions.

[Learn more about Allowing Agents to Change Due Dates →](#)

- 5 **Save the template** then sit back and wait for the new date *Task* to start applying automatically to transactions.

- 6 **Take advantage of the features of *Tasks* to track the date** once it starts applying automatically to transactions.

Use Date Tasks

Once a date *Task* is added to transactions and a date is set for it, agents and admins can take advantage of the following tracking abilities of *Tasks*.

Add / Manage the Date on Transactions

Tasks give admins the ability to update the date on transactions. Agents can also update the date if it has been set as *Agent-editable* by an admin.

[Learn how to Manage Checklists on Transactions →](#)

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

9398 Oak Street Added on Mar 2, 2023 by Hollis Holcomb
Last updated just now by Hollis Holcomb

General

Status: Listed **Listed On:**
MLS #: 740899808 **Expires On:**
Label: Residential
Side: Listing
Location: Kings Coast Real Estate

Seller & Buyer

Seller: Doug Rangel

Sale & Commission

List Price: \$400,000

Listing Agents

Otis Bowkin hollis+otis@nnplessineline.com

Checklists 0% ✓

Listing Dates

- Staging Date ♂ 8/2
- Photography Date ♂ 8/2
- Listing Date ♂ 8/7

Add doc name or task

View the Date on Transactions

Once a date is set for a *Task*, it will conveniently show next to the *Task* in the *Checklists* area on the transaction.

[Learn how to View Checklists on Transactions →](#)

Checklists 0% ✓

Listing Dates

- Staging Date ♂ 7/28
- Photography Date ♂ 8/2
- Listing Date ♂ 8/7

Add doc name or task

View the Date on the Tasks Page

Once a date is set for a *Task*, it can be tracked on the *Tasks* page along with other upcoming and overdue *Tasks*.

[Learn more about the Tasks Page →](#)

Search address, ml, agent, seller, buyer

Transactions **Tasks** Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Hollis H.

Overdue and Upcoming Tasks 101-108 of 108 tasks.

Sync tasks with your iCal, Outlook or Google Calendar

Search Filter Sort Columns Add Shortcut

« First < Prev Next > Last »

Due	Task	Transaction	Checklist	Visibility	Status	Agents
Fri 7/21	Residential Purchase Agreement	123 Thre Avenue	Residential Checklist 05 Pending Residential Buyer	Anyone	Closed	
Fri 7/21	Seller Property Questionnaire	123 Thre Avenue	Residential Checklist 05 Pending Residential Buyer	Anyone	Closed	
Fri 7/28	Staging Date	9398 Oak Street	Residential Listing Dates	Anyone	Listed	
Wed 8/2	Photography Date	9398 Oak Street	Residential Listing Dates	Anyone	Listed	
Mon 8/7	Listing Date	9398 Oak Street	Residential Listing Dates	Anyone	Listed	
Sat 9/30	Otis's Birthday	Otis Boykin	Important Dates for HR Files	Anyone	Closed	

Get Reminders

Agents and admins can also get reminded about the date in *Daily Task Reminders* and synced calendars.

Daily Task Reminders

Agents and admins who are opted into receiving *Daily Task Reminders* will get email reminders about any date *Tasks* that are upcoming or in the past.

[Learn more about Daily Task Reminders →](#)

Synced Calendars

Agents and admins who have synced their *Tasks* will see date *Tasks* on their calendars. If they have set up notifications in their calendar app, they will also be notified.

[Learn more about Syncing Calendars →](#)