

Task @Mentions

Task @Mentions allow admins to highlight tasks so specific people or groups can easily find and address it on transactions, the Tasks Page, and in received emails.

Introduction

An admin can use @mention to make a task appear more prominently to a specific user or user group by @mentioning their name or role within that task. @mentioning users on a task will highlight the task for the user on the transaction, on the *Tasks* page, and in received emails.

An admin can also use @mention to set a task to only be visible to a specific user or user group. Once someone is @mentioned on a task, the task's visibility can be set to [@mention] so that the task is only visible to the @mentioned user(s).

How It Works

By Role

User Role

By Name

Last Name

First Initial + Last Name

By Email Address

Best Practices

Example

On a Transaction Checklist

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

View Transaction
 Edit Transaction
 Upload Docs
 Assign Docs
 Transaction History
 Received Emails (0)
 Download Transaction
 Manage Commissions

123 Main Street Added on Jul 29, 2024 by Hollis Holcomb
 Last updated 8 minutes ago by Hollis Holcomb
 Email docs and notes to this transaction: 2308-269308-TX-6028806@docs.paperlesspipe

General
Status: Listed
MLS #: MYSTATE-12345
Label: Residential
Side: Listing
Location: Pine Realty

Seller & Buyer
 Sale & Commission
Commission Summary: Realtor Commission paid by:
Listing Agents
 Jonathan Carey jcarey@example.com

Note / Email Add Contact Send to DocuSign Merge

Checklists 0% ✓

- Listing

- Listing Agreement ♂ 7/29
- Seller's property disclosure 7/29
- Agency Disclosure @admin 7/24
- Lead based paint addendum (if applicable) 7/29
- MLS input sheet 7/29
- Seller's authorization to advertise property 7/24

Add doc name or task

On the Tasks Page

Overdue and Upcoming Tasks 14 tasks.

Sync tasks with your iCal, Outlook or Google Calendar

task or transaction Search Sort Columns

Due	Task	Transaction
Thu 4/18	Solar Advisory and Questionnaire <input type="checkbox"/>	7297 Riverside Lane L+B Condo
Tue 7/2	Residential Purchase Agreement <input type="checkbox"/>	7297 Riverside Lane L+B Condo
Thu 7/4	Property Profile <input checked="" type="checkbox"/>	7297 Riverside Lane L+B Condo
Sat 7/6	Agency Disclosure <input checked="" type="checkbox"/>	7297 Riverside Lane L+B Condo
Mon 7/22	Close Date <input type="checkbox"/> ♂	8540 Zion Street L Residential
Wed 7/24	Agency Disclosure @admin <input type="checkbox"/>	123 Main Street L Residential
Wed 7/24	Seller's authorization to advertis... <input type="checkbox"/>	123 Main Street L Residential
Thu 8/1	Listing Date <input type="checkbox"/> ♂	8540 Zion Street L Residential
Thu 8/1	Post Yard Sign @agent <input type="checkbox"/>	8540 Zion Street L Residential
Wed 3/5	Expiration Date <input type="checkbox"/> ♂	Copy of 123 Duplicatio L+B Residential

In Daily Task Reminder Emails

Tasks due by Tue, Jul 30

Today's Tasks

Task	Transaction	Visible To	Due On
CDA @agent	456 Browntown Road	Anyone	Mon, Jul 29
Send anniversary reminder email	123 Zellville Avenue	Anyone	Mon, Jul 29
Send anniversary reminder email	987 Smith Street	Anyone	Mon, Jul 29

Find a User's @Mention Name

Find a user's @Mention Name to be used

Who Can Do This: Admins with *Create users and locations*.

To find a user's @Mention Name:

Go to Manage Users :

- Click your name in the upper right corner, then [Admin / Settings].
- Select [Manage Users] from the People section of the left menu.

Find User:

- Find the user you wish to @Mention.

Reference User Details:

- Identify the user's details needed to @Mention them:
 - **Role:** Use the User's Role as displayed. For example, "@managing broker."
 - **Last Name:** Use their Last Name. For example, "@smith."
 - **First Initial + Last Name:** Use First Initial + Last Name when you need to differentiate between users with the same last name. For example, "@bsmith."

@Mention a Task in a Checklist Template

@Mention a person or group in a task to highlight it and make it more prominent for those @mentioned.

Who Can Do This: Admins with permission to *Fully manage checklists and templates*.

To @Mention a person or group in a task:

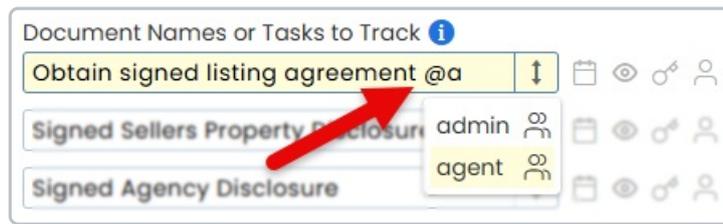
Open Template:

- Either add a new Checklist Template or edit an existing one.
[Learn how to Add & Edit Checklist Templates →](#)

Add @Mention:

- Add a new task or edit an existing task on the template.

- Start typing the user's @Mention Name and select it from the list.



Save:

- Click [Save Template] to save the @Mentioned task.

@Mention in a Task on Transaction Checklists

@Mention a person or group in a task to highlight it and make it more prominent for those @mentioned.

Who Can Do This: Admins with permission to *Fully manage checklists and templates.*

To @Mention a person or group in a task:

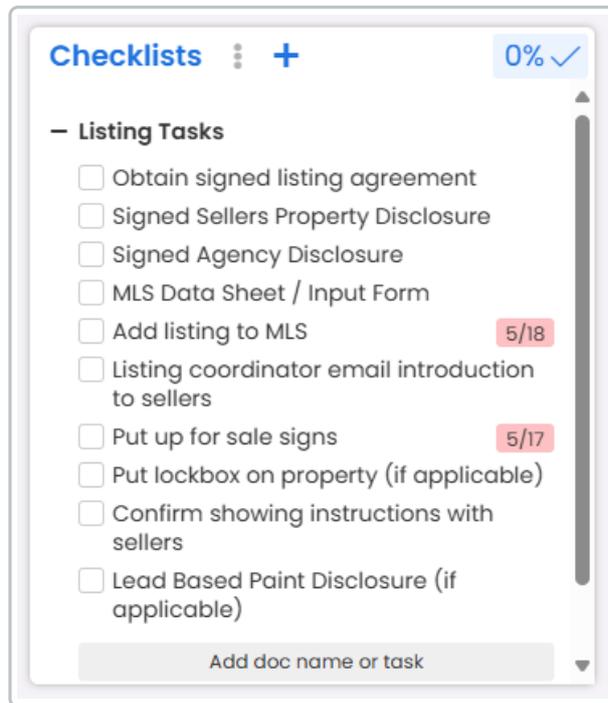
Go To a Transaction:

-

Add or Edit Task:

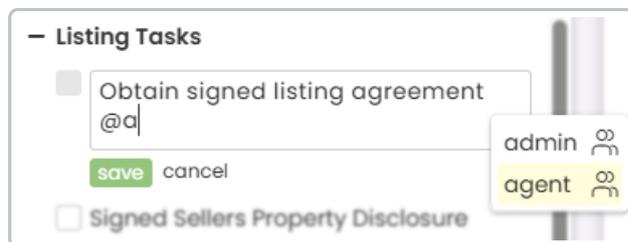
- Add a new task or edit an existing task on your preferred checklist.

[Learn how to Add & Edit Checklists on Transactions →](#)



Add @Mention:

- Start typing the user's @Mention Name and select it from the list.



Save:

- Click [Save] to save the @Mentioned task.

Use @Mention as a Task Visibility Type

Set a task's Visibility Type to @Mention to prevent anyone who is not @Mentioned on the task from seeing it.

[Learn how to Set Task Visibility →](#)

Train Your Team to Use Their @Mentions

[View @Mentions](#)

On Transaction Checklists

[Learn more about Checklists on Transactions →](#)

On the Tasks List

[Learn more about Your Tasks List →](#)

In Daily Task Reminder Emails

[Learn more about Daily Task Reminder Emails →](#)

Filter Your @Mentions

[Learn more about Task Filtering →](#)

Sync Your @Mentions

[Learn more about Syncing Tasks →](#)