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

On the Tasks Page

In Daily Task Reminder Emails

Find a User's @Mention Name

Find a user's @Mention Name to be used

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.
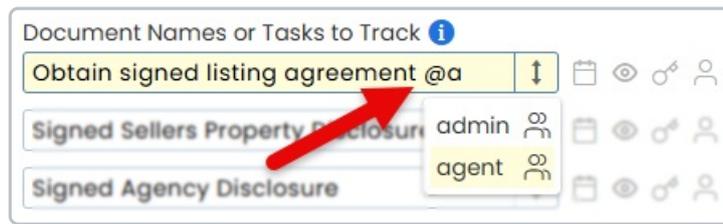
To @Mention a person or group in a task:

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*.

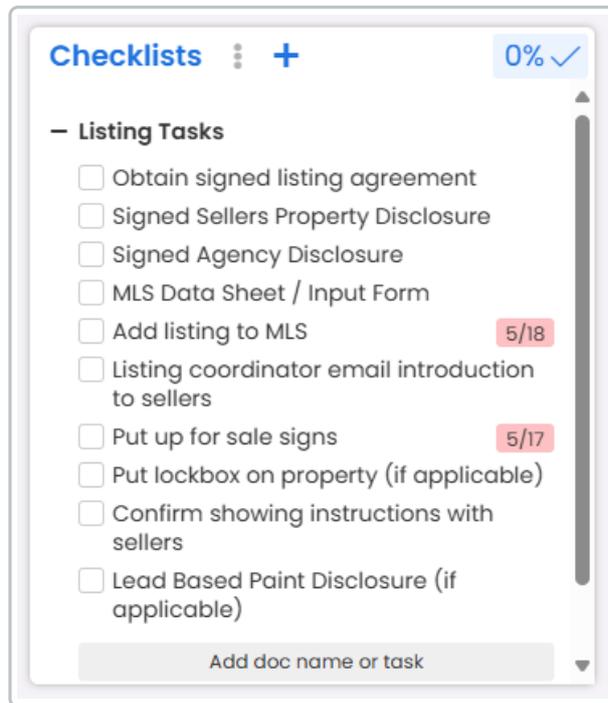To @Mention a person or group in a task:

Go To a Transaction:

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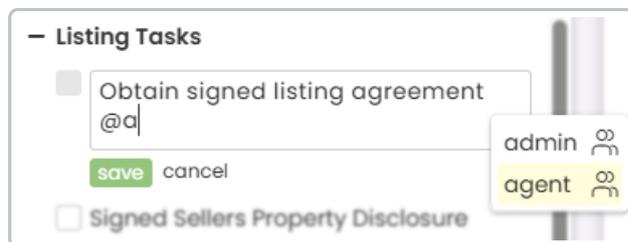
- Add a new task or edit an existing task on your preferred checklist.

  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 →