Task Visibility

Task Visibility controls who can see specific tasks on a checklist, enabling sensitive or confidential tasks to be restricted to certain users.

Introduction

Task Visibility allows admins to control who sees each task, enhancing privacy, organization, and efficiency by ensuring agents and admins only view relevant tasks for their roles.

Agents and admins only see checklists added to transactions they have access to view. You can further control the visibility of each task, adding an extra layer of privacy, organizing tasks more effectively, and ensuring only responsible users are involved.

With Task Visibility, you can:

- Assign property listing tasks to the listing agent.
- Assign buyer interaction tasks to the buying agent.
- Make compliance-related tasks visible only to admins and brokers.
- Share marketing tasks with the entire team.

These visibility settings help keep tasks focused on the right people, maintaining confidentiality and clarity. By ensuring each agent only sees tasks relevant to their role, Task Visibility helps avoid confusion and keeps everyone focused and efficient.

How It Works

Anyone

Task is visible only to agents assigned to the transaction and admins with the "View all transactions" permission for the transaction's location.

Admins

Task is visible only to admins with the "Fully manage checklists and templates" permission in the transaction's location.

Listing Agents

Task is visible only to the assigned listing agent(s) and admins with the "Fully manage checklists and templates" permission in the transaction's location.

Selling Agents

Task is visible only to the assigned selling agent(s) and admins with the "Fully manage checklists and templates" permission in the transaction's location.

Listing & Selling Agents

Task is visible only to the assigned agent(s) and admins with the "Fully manage checklists and templates" permission in the transaction's location.

@Mention

Task is visible only to the person, people, or role @mentioned on the task.

Set Task Visibility on Checklist Templates

Set Task Visibility to control who has access to view specific tasks within a transaction.

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

To set Task Visibility on Checklist Templates:

Open Template:

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

Set Task Visibility:

- Click the [eyeball icon] next to a task.
- Select the desired Visibility Type (described above).

Save:

- Click [Save Template] to save the Task Visibility settings.

Set Task Visibility on Transaction Checklists

Set Task Visibility for tasks on transaction checklists, ensuring tasks are only seen by the right people.

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

To set a transaction task's Visibility Type:

Go to a transaction.

Set Visibility:

- Hover over the [eyeball icon] next to the task.
- Select the desired Visibility Type (described above).

Save:

- Click [Save Template] to save the Task Visibility settings.