Admin Task Completion

Admins review and complete tasks to ensure accurate and compliant transactions.

Introduction

Admins use tasks to keep an accurate record of each transaction's progress. They do this by completing tasks themselves or by reviewing and approving tasks marked by agents.

When completing tasks themselves, Admins check off the task, which is then considered fully complete.

When reviewing tasks marked by agents as done or not applicable, Admins verify the details for accuracy, then check off the task to complete it.

Whenever an Admin completes a task, the transaction's Checklist Completion Status is updated. This ensures tasks are completed accurately and efficiently, maintaining a clear record of each transaction's progress.

How It Works

Agent Task Fulfillment

Admins hold ultimate responsibility for verifying and completing tasks, but agents may notify admins that their part of a task is finished by marking it as done (Agent-checked) or not applicable (N/A).

Admin Task Completion

When reviewing tasks marked by agents as done (Agent-checked) or not applicable (N/A), Admins verify the required details for accuracy.

If more work is needed, Admins can unmark the task to indicate it is still required. If the unmarked task has a due date, it will be included on the agent's Tasks List and in their Daily Task Reminder Email.

If everything is correct, Admins check off the task to complete it. Once completed, the transaction's Checklist Completion Status will be updated.

Unmark an Agent-fulfilled Task

> Unmark a task fulfilled by an agent and marked as done (Agent-checked) or not applicable (N/A) when more work is needed for the task or you don't approve.

Who Can Do This: Admins with permission to *Fully manage checklists and templates* can unmark an agent-checked or n/a task.

To unmark an agent-checked or n/a task:

1. **Go to a Transaction's Checklists Area**:
   - Here's how to Access Checklists on Transactions →
2. **Hover & Unmark the Task**:
   - Hover the task's checkbox.
   - Click the [x] that appears over the agent-check or n/a mark.
   - The task will become due again for the agent.

Complete a Task

Complete a task to update the transaction's Checklist Completion Status once you've fulfilled the requirement or confirmed it was completed.

Who Can Do This: Admins with permission to *Fully manage checklists and templates* in the transaction's location can complete tasks.

To approve and complete a task:

1. **Go to a Transaction's Checklists Area**:
   - Here's how to Access Checklists on Transactions →
2. **Check the Task**:
   - Check the box next to the task.
   - The transaction's Checklist Completion Status will be updated.