

Tasks List Personalization

Your Tasks List offers a customizable view that lets you track and prioritize your tasks in a way that suits your unique workflow, helping you stay focused and productive.

Introduction

Your Tasks List on the [Tasks Page](#) is your dynamic calendar across all transactions. It guides you on what needs attention each day, providing a clear and organized view of your overdue and upcoming tasks.

You can personalize your view on the Tasks List by showing or hiding specific columns and @mention text. Pipeline remembers your preferences, so you can pick up where you left off when you return.

This ensures you see exactly what you need, making your workflow more efficient and tailored to your needs.

Show & Hide Columns

Show and hide columns to customize your Tasks List; Pipeline will remember your preferences for next time.

Who Can Do This: Anyone.

To show and hide columns on:

Go To Tasks List Page :

- Click [Tasks] from the top menu.

Choose Columns:

- Click [Columns ▼].

The screenshot shows the 'Overdue and Upcoming Tasks' view with 1-50 of 1517 tasks. The table has columns for Due date, Task, Transaction, and Checklist. A red arrow points to the 'Columns' dropdown menu in the task list header.

Due	Task	Transaction	Checklist
Tue 12/10	Notice to Prospective Buyer	1234 Mansion Road Residential	Required Lis
Tue 12/10	Review HOA	1234 Mansion Road Residential	Required Lis
Tue 12/10	Send congratulations mess...	1234 Mansion Road Residential	Closing Che
Tue 12/10	Send congratulations mess...	1234 Mansion Road Residential	Closing Che
Thu 12/12	Insurance	1234 Mansion Road Residential	Residential I

- Check the boxes next to the columns you want to display on your Tasks List.

- Uncheck the boxes for the columns you want to hide.

Save:

- Click [Done]. Your selected columns will be displayed, while unchecked columns will remain hidden.

Hide @Mention Text

Hide @mention text to reduce clutter on your Tasks List and make it easier to read; Pipeline will remember your preference for next time.

Who Can Do This: Anyone.

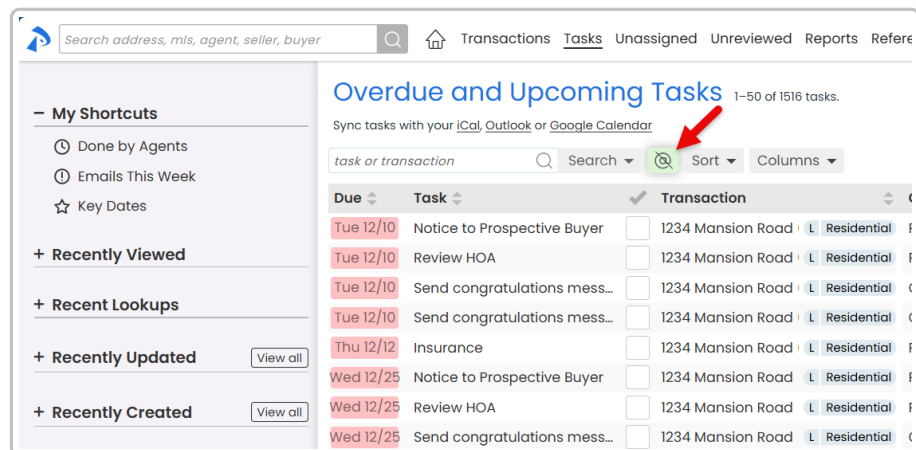
To hide @mention text on your Tasks List:

Go To Tasks List Page :

- Click [Tasks] from the top menu.

Toggle @Mentions:

- Click [@] to hide @mention names within tasks.



The screenshot shows the 'Overdue and Upcoming Tasks' page in a CRM system. The page has a search bar at the top with the text 'Search address, mls, agent, seller, buyer'. Below the search bar are navigation tabs: 'Transactions', 'Tasks', 'Unassigned', 'Unreviewed', 'Reports', and 'Refer'. The main content area is titled 'Overdue and Upcoming Tasks' and shows a list of tasks. A red arrow points to the '@' icon in the task list header, which is used to toggle the visibility of @mentions. The task list has columns for 'Due', 'Task', and 'Transaction'. The tasks listed are:

Due	Task	Transaction
Tue 12/10	Notice to Prospective Buyer	1234 Mansion Road Residential
Tue 12/10	Review HOA	1234 Mansion Road Residential
Tue 12/10	Send congratulations mess...	1234 Mansion Road Residential
Tue 12/10	Send congratulations mess...	1234 Mansion Road Residential
Thu 12/12	Insurance	1234 Mansion Road Residential
Wed 12/25	Notice to Prospective Buyer	1234 Mansion Road Residential
Wed 12/25	Review HOA	1234 Mansion Road Residential
Wed 12/25	Send congratulations mess...	1234 Mansion Road Residential

- Click [@] again to show them.

Search address, mls, agent, seller, buyer

Transactions **Tasks** Unassigned Unreviewed Reports Refere

Overdue and Upcoming Tasks

1-50 of 1516 tasks.

Sync tasks with your [iCal](#), [Outlook](#) or [Google Calendar](#)

task or transaction Search @ Sort Columns

Due	Task	Transaction
Tue 12/10	Notice to Prospective Buyer	1234 Mansion Road L Residential
Tue 12/10	Review HOA @admin	1234 Mansion Road L Residential
Tue 12/10	Send congratulations mess...	1234 Mansion Road L Residential
Tue 12/10	Send congratulations mess...	1234 Mansion Road L Residential
Thu 12/12	Insurance @admin	1234 Mansion Road L Residential
Wed 12/25	Notice to Prospective Buyer	1234 Mansion Road L Residential
Wed 12/25	Review HOA @admin	1234 Mansion Road L Residential
Wed 12/25	Send congratulations mess...	1234 Mansion Road L Residential