Agent Task Fulfillment

Agents can notify admins when their part of a task is finished by marking the task as done (Agent-checked) or not applicable (N/A).

Introduction

Agents use tasks to keep an accurate record of their progress within transactions. They do this by marking tasks as done (Agent-checked) or not applicable (N/A).

When an agent has completed all necessary requirements for a task, they can mark it as done (Agent-checked). If a task is not relevant on a transaction, they mark it as not applicable (N/A).

Once an agent marks a task, it is removed from their Daily Task Reminder Email and Task List, indicating it is ready for review by an admin.

Whenever an agent marks a task as done or not applicable, it signals that the task has been addressed, helping to maintain an organized and efficient workflow.

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).

Once agents mark a task, it will no longer appear in their Daily Task Reminder Email or on Tasks Page.

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.

Mark Tasks as Done (Agent-checked)

Mark a task as done (Agent-checked) to let admins know it is ready for their review.

Who Can Do This: Agents & Admins without permission to *Fully manage checklists and templates* can agent-check tasks.

To mark a task done (Agent-checked):

1. **Go to a Transaction's Checklists Area**:
   - Here's how to Access Checklists on Transactions →
2. **Mark the Task as Done**:
   - Check the box to the left of the task.
   - The task will be Agent-checked.

Mark a Task as Not Applicable (N/A)

Mark a task as not applicable (N/A) to let admins know it isn't needed.

Who Can Do This: Agents & Admins without permission to *Fully manage checklists and templates* can mark tasks as N/A.

To mark a task as not applicable (N/A):

1. **Go to a Transaction's Checklists Area**
   - **Here's how to Access Checklists on Transactions →**
2. **Mark the Task as N/A**:
   - Hold the [Shift] key on your keyboard and click the box to the left of the task.
   - When the agent task options appear, click [Not Applicable], then [Done].
   - The task will be marked as N/A.