

Highlight a Person's Task by @mentioning Them

SUMMARY

An admin can use @mention to highlight or assign tasks to users or groups.

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Video: Highlight a person's Task by @mentioning Them

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What is @mention?

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).

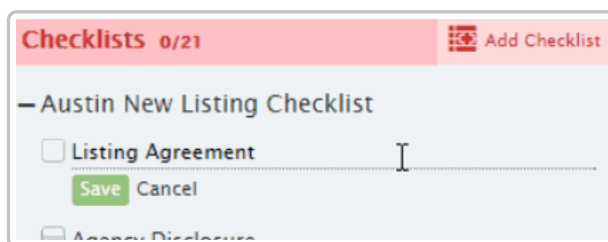
Mention a Person in a Task

To mention a specific person in a task, use any of the following:

- Last name
- First initial + last name

- The portion of their Pipeline login email address that appears before the @

For example, for Joe Smith who has the email address, josephksmith@ABCCreality.com, enter any of the following: @smith, @jsmith, @josephksmith



@lastname will work for most cases where you want to address a specific user. But if you have multiple users with the same last name, use their first initial and full last name. For example, use @jsmith to mention Joe Smith and @asmith to mention Anne Smith.

Mention a Group of People in a Task

- Enter multiple separate @mentions using the method above
 - For example: @smith @williams @jacobs
- Enter users' role (as defined in the Role field of their Manage Users profile).
 - For example: @officestaff

Where to Use @mention

To @mention a specific user or group of users, edit the task name on either the checklist template (if you need the @mention to be present on all transactions where the task is used) or directly on the transaction (if you need the @mention to only be for a specific transaction).

To edit a task on a checklist template:

- 1 Go to Admin / Settings
 - Click your name in the upper right corner, then [Admin / Settings].
- 2 Click [Checklists] from the left menu.
- 3 Click the name of the checklist that contains the task to open the checklist template.
- 4 @mention the user's name or role in the task name.

Automatically apply to transactions in all locations

Document Names or Tasks to Track

- B-1 Initial Deposit to Escrow @jsmith
- D-2 Additional Deposit due (due after approval of J-1)
- E-3 Inventory Delivered to Buyer

To edit a task that's already been added to a transaction:

- 1 Click the [Pencil] to edit the desired task.
- 2 @mention the user's name or role in the task name.

Send Tasks with @mentions

When sending a note or email from a transaction, if you append complete, overdue, or incomplete tasks, the recipient's @mentioned tasks will be automatically highlighted in the message.

Options

- ☐ Make this note private (in Notes & Sent Emails below)
- ☐ Send me a BCC (blind copy) of the message
- ☐ Save this message as a reusable template
- ☐ Append **incomplete** tasks to message
- ☐ Append **completed** tasks to message
- ☐ Append **overdue** tasks to message

Use @mention to Set Visibility

Use the @mention feature to set a task to be visible to a specific user, multiple users, or to a group of users (Role). Tasks assigned the @mention visibility are only visible to the person or people @mentioned on the task.

[Learn how to Set Task Visibility here →](#)

View Highlighted Tasks

Users who are @mentioned on tasks will see their tasks automatically highlighted wherever tasks are shown:

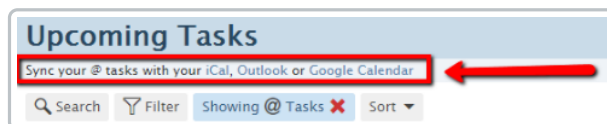
On Transactions

On Emails

On the Tasks Page

Due	Task	Visibility	C
Sat 9/2	Buyer to submit loan application @angeletti	Anyone	Ti
Mon 7/31	Lockbox Keys	Anyone	Li
Mon 10/31	Lockbox Keys	Anyone	Li
Wed 9/14	Agency Disclosure @rmcwhirter	Anyone	Li
Fri 9/9	Financial Addendum @rmcwhirter	Anyone	Li
Wed 9/7	Listing Agreement @rmcwhirter	Anyone	Li
Wed 9/7	MLS Info	Anyone	Li
Mon 9/5	Seller's Property Disclosure @rmcwhirter	Anyone	Li

Users can click **@ Your Tasks** to view only tasks where they are @mentioned. They can also sync their @mentioned tasks to their external calendar by selecting **@ Your Tasks** then selecting the appropriate sync option. [Learn how to Sync and Unsync Tasks with Calendars →](#)



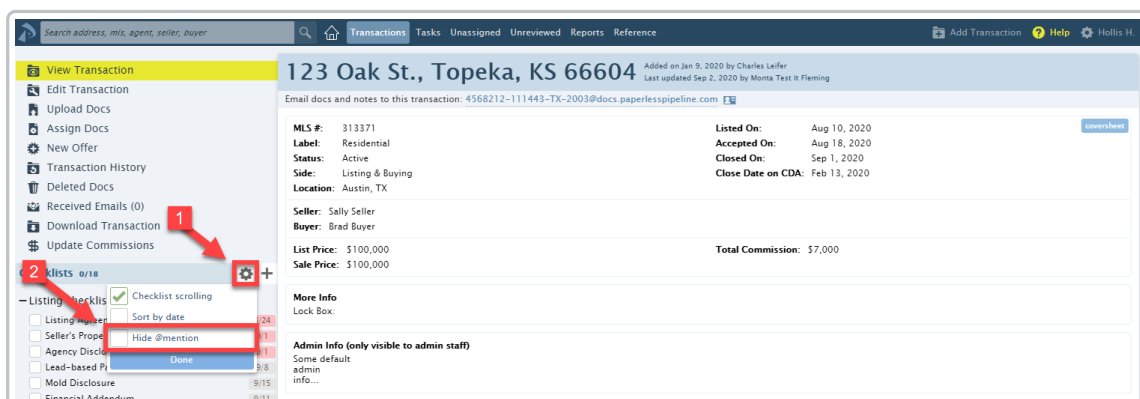
 Clicking [Showing @ Tasks] turns off the filter and shows all tasks you have access to view.

Hide @mention Text

You can choose to hide @mention text on transactions and on the Tasks page. Hiding @mention text reduces clutter within your task names and makes them easier to read.

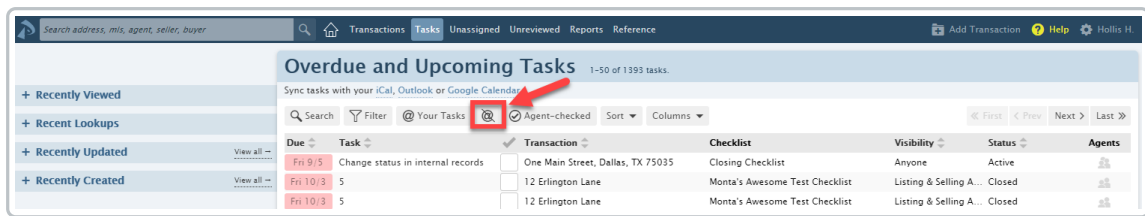
To hide @mention text on the transaction:

- 1 Click the gear to the right of the *Checklists* section in the left menu.
- 2 Select [Hide @mention], then click [Done].



To hide @mention text on the Tasks page:

- 1 Click the @ icon.



The system will remember your setting to hide or unhide the @mention text and keep it that way unless you change it.

FAQ

Q: Can agents add @mentions to tasks?

A: No. The ability to manage and edit tasks (including adding @mentions) is an admin function and is not suitable for agents.

Q: Does @mentioning someone trigger reminders to be sent to them? Does it prevent reminders from being sent to others?

A: The @mention feature highlights tasks for the users who are @mentioned. Unless the visibility is also set to [@mention], it does not impact whether reminders are sent or not nor who they are sent to. Who receives reminders is determined by who has visibility to a task. [Learn how to Set Task Visibility here](#) →



Unless you set the visibility of the task to @mention, using @mention only highlights a task and doesn't grant visibility. [Learn how to Set Task Visibility here](#) →