

Hide Completed Tasks from Transaction Checklists

SUMMARY

Completed tasks can be set to be hidden on transaction checklists. Hiding completed tasks reduces clutter and makes checklists easier to manage.

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Setting Completed Tasks to be Hidden

Master Admins can set their account to hide completed tasks by default on transaction checklists.

1 Go to Admin / Settings

- Click your name in the upper right corner, then [Admin / Settings].

2 Check the option to “Hide completed tasks in transaction checklists”.

☐ Show checklist completion percentages to agents

☒ Hide completed tasks in transaction checklists

☐ Only include completed transactions in monthly backups

3 Scroll down and click [Save Settings].

Viewing Completed Tasks

When an account is set to hide completed tasks, completed tasks will be hidden by default on transaction checklists. To view completed tasks, click “Show completed tasks”.

 View Transaction

 Edit Transaction

 Upload Docs

 Assign Docs

 New Offer

 Transaction History

 Received Emails (0)

 Download Transaction

☒ checklist scrolling

Checklists 4/19

 Add Checklist

— Austin New Listing Checklist

☐ Seller's Property Disclosure

☐ Agency Disclosure

☐ Lead-based Paint Disclosure

☐ Mold Disclosure

☐ Lockbox Keys

☐ Listing Agreement @jsmith @office staff

☐ Financial Adendum

☒ Show completed tasks →

Add doc name or task

To hide completed tasks that have been shown, refresh the page.

