Assign Every Task to the Right Person From the Template

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Decide once, on the template, who owns each task — and let that decision ride onto every transaction the checklist touches.

Introduction

A checklist where every task belongs to everyone is a checklist nobody owns. In practice the work is already divided: the listing coordinator handles the first four items, the transaction coordinator handles the compliance block, the agent handles the rest. Your template just doesn't say so yet.

You can put that division into the template itself. @mention a person or a role on a task, and the mention travels with the checklist onto every transaction it's added to from then on. No per-deal setup, no reminding people what's theirs.

What makes this work is understanding that three separate things have to line up. The @mention labels the task. Visibility restricts it. And underneath both, the person still has to be able to reach the transaction at all. Get all three and you have a real assignment; get one and you have a green highlight.

When to Use This

- You're building or reworking a checklist template and each task really belongs to a different person or role.
- You want a coordinator to see their tasks and not the whole office's.
- Everyone in the office is getting reminder emails for tasks that were never theirs.
- You @mentioned someone and nothing changed — they still say they can't find their tasks anywhere.
- Someone's name or role changed and their old tasks are still following them around.

Why This Takes More Than an @Mention

The instinct is that @mentioning someone assigns the task to them: they'll see it, own it, get reminded about it, and nobody else will be bothered by it. None of that is true on its own. An @mention *highlights* — it turns the task green wherever that person can already see it. By itself it doesn't grant access, doesn't take access away, and doesn't change who gets a reminder email.

So the office that @mentions everything and stops there lands exactly where it started. Every agent still sees every task marked **Visible to Anyone**, and still gets a daily reminder covering all of it — the mentions just made some of the noise green. The mention is the label; visibility is the lock. You want both, and you want them set on the template so you're not doing it again on every deal.

1. Decide Whether Each Task Belongs to a Person or a Role

Work through your template and mark each task with who does it. You have two ways to say that, and they behave differently.

Mention a **person** when one named individual does the task — the mention lands on them and nobody else. Mention a **role** when the task belongs to a seat rather than a specific human, and it reaches everyone carrying that role at once. A role mention has to match the Role field on people's user profiles, so it's worth checking those are set the way you think before you lean on them.

> One person can't be @mentioned under two different role names — Pipeline gives each user one role. If someone genuinely wears two hats and needs both sets of tasks separately, the only route is a second profile under an email alias, which they log into separately. Worth knowing before you design a template around it.

2. Add the @Mention to the Task on the Template

The mention goes into the task's name, on the checklist template rather than on a transaction. That's the whole point of doing it here: every transaction that receives the checklist from now on arrives with the mentions already in place.

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See Task @Mentions

3. Turn the Mention Into a Restriction

This is the step that converts a highlight into an assignment. Set the task's visibility type to**@mention** and it becomes visible only to the people mentioned on it, plus master admins. Now the coordinator's tasks are the coordinator's, and the agent doesn't see them or get reminded about them.

Set it on the template alongside the mention, so the pairing holds everywhere the checklist goes.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility

> Don't put every task on a checklist behind @mention visibility. A checklist only appears for someone if at least one task on it is visible to them — so a checklist where they're mentioned nowhere vanishes for them completely, rather than showing up empty. If a checklist should be visible to a group at all, leave at least one task on it that they can see.

4. Give Every Assigned Task a Due Date

This is the step that decides whether any of the above was real, and it's the one that gets skipped.

The Tasks page is a due-date calendar. A task with no due date never appears on it — not for the person mentioned, not for anyone, no matter how carefully you set the mention and the visibility. That's the actual reason behind most of the "I'm @mentioned but I can't see my tasks anywhere" reports. Relative due dates on the template solve it permanently, because every transaction that gets the checklist calculates its own dates on arrival.

A due date is what puts a task on your Tasks page, into your reminder emails, and onto your calendar — and taking it back off is how you quiet a task you no longer need.

See Task Due Dates

5. Make Sure Each Person Can Reach the Transaction

Everything above sits on top of one gate: can this person open the transaction at all? Task visibility never overrides transaction access. An @mention doesn't grant it either — it only highlights tasks for people who already have it.

For an agent, that means being on the transaction as an agent or an assistant. For an admin, it means *View All Transactions* — and because Pipeline grants permissions per Location, holding it in one Location says nothing about another. A coordinator who can see their mentions on one office's deals and not another's is almost always looking at a Location gap, not a checklist problem.

Access decides who can see a transaction's checklist and each task on it — and in Pipeline, that comes down to who's on the transaction and the visibility set on each task.

See Checklist Access

> @mention visibility has a use you might not expect: reaching an admin who *can't* see admin tasks. **Visible to Admins** only reaches admins who also hold *Fully manage checklists* — *View All Transactions* on its own isn't enough. To get a task in front of an admin without that permission, @mention them or their role and set the task to @mention visibility instead.

6. Point Each Person at Their Own List

An assignment nobody can pull up isn't doing much. Once mentions and due dates are in place, each person can filter their Tasks page down to just the tasks that mention them and keep that view one click away.

Your Tasks page shows every task you can see, which on a busy account means everyone's work. A little setup turns it into your list, one click from Home.

See Work Your Own Task List From One Page

> When someone's @mention handle changes — say they went from *@shaw* to *@cshaw* — tasks tagged with the old handle keep turning up in their list. Fixing the live transactions isn't enough on its own; update any templates still carrying the old tag, or every new transaction rebuilds the problem.