Build a Checklist Only Certain People Can See

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Some work isn't the agent's business — the compliance review, the commission math, the file your TC quietly runs. You can put it on a checklist that never shows up in their world at all.

Introduction

Every office has a set of tasks that belong to one person. The transaction coordinator's list. The internal audit steps. The back-office follow-ups that would only confuse the agent whose name is on the deal. You want them tracked on the transaction like everything else, just not in front of everyone on it.

Pipeline does this with two settings working together: you **@mention** the people the tasks belong to, and you set each task's **visibility** to @mention. Do both, on every task, and the checklist disappears for everyone else. Do only one, and it doesn't.

That pairing is the whole job, and the rest of this article is about applying it without leaving a gap.

When to Use This

- You want a checklist your TC works from and your agents never see.
- You built a checklist for two or three specific people, not for the whole office.
- You @mentioned someone on a task and your agents can still see it.
- Your internal to-dos are cluttering up the agent's view of their own transaction.
- Agents are getting reminder emails about tasks that were never theirs to do.

Why This Takes Two Settings, Not One

The instinct is to @mention the person and consider it done — their name is on the task, so surely it's theirs now. It isn't. An @mention on its own only highlights a task for the person named; it changes nothing about who can see it. Mention your TC on a task that's still set to *Visible to Anyone* and every agent on that transaction sees it, and gets reminded about it, exactly as before.

The visibility setting is what actually restricts. The @mention is what tells it whom to restrict it to. Neither one does the job alone, which is why the two get set together and why a checklist that looks locked down can quietly not be.

1. Decide Who Should See It

Two different answers, two different amounts of work — so pick before you start.

If the answer is **your admins as a group**, stop here: that's a single setting. Set the task's visibility to *Admins* and you're done — no @mentions needed, on that task or any other.

If the answer is **specific people** — your TC, one agent, one role, a named handful — then @mention visibility is the tool, and steps 2 through 5 are how you apply it.

> *Visible to Admins* follows the *Fully manage checklists and templates* permission, not a person's job title. An admin who only has *View all transactions* won't see those tasks. If you need to reach that specific admin, @mention them and use @mention visibility instead — the same path as everyone else in this article.

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

See Task Visibility

2. Get Your People Onto the Transaction First

Visibility narrows who sees a task. It never widens it. @mentioning someone on a task they couldn't already reach doesn't hand them anything — if they can't open the transaction, the task isn't there for them to see, mention or no mention.

So before you build anything: the people this checklist is for need to reach the transaction already, either by being added to it or by holding *View all transactions* for that location. This is the step that explains most "I set it up exactly right and she still can't see it" reports — the setting was fine, the location access wasn't.

> Access is granted per location. Someone who can reach every transaction in one office still sees nothing in another — so a person coordinating several offices needs it in each one.

A transaction coordinator lives in your checklists. One permission decides whether they can actually work them.

See Give a TC Exactly the Checklist Access They Need

3. @Mention Your People and Set Visibility to @Mention

Now the pairing itself. On each task, @mention the person — or the role, which is the better move when the job outlives the person holding it — and then set that task's visibility type to *@mention*. Both, on the same task.

Once it's set, only the people mentioned on that task and your master admins can see it. Everyone else on the transaction has no idea it exists, and no reminder email will ever mention it to them.

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

See Task @Mentions

4. Do It on Every Single Task

This is the step that decides whether any of the rest worked, and it's the one people miss.

A checklist shows up for someone if *even one* task on it is visible to them. Lock down nine tasks out of ten and the checklist still appears on your agent's transaction, carrying the tenth — and the checklist's name along with it. There's no setting on the checklist itself; the checklist is only ever as private as its most visible task.

So when the goal is a checklist that's genuinely invisible, every task on it needs both an @mention and @mention visibility. No exceptions, including the obvious-looking ones nobody would care about.

> Master admins are the exception you can't configure away: they see every task no matter its visibility. That's by design — it's what keeps someone able to audit the account.

Set this on the checklist template and it carries to every transaction the template reaches. Tasks already sitting on active transactions keep whatever they were given when they landed, so those get updated on the transaction itself.

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates

5. Give the Tasks Due Dates So They Reach the Right Lists

Hiding the checklist from your agents doesn't put it in front of the person who owns it. A due date does that.

A task with no due date never reaches anyone's Tasks page and never appears in a reminder email — @mentioned or not. Your TC can still find it by opening the transaction, but it won't come to them. If this checklist is someone's actual working list, the due dates are what make it one.

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