Task @Mentions

Last Modified on 11/10/2026 12:25 pm EST

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

Introduction

Two or three people work the same file, the checklist runs long, and nothing on it says whose task is whose. An @mention is how you mark one. The task then shows up highlighted for that person on the transaction, on their Tasks page, and in the task emails Pipeline sends them.

Because the mention lives in the task name, an admin usually adds it to the checklist template rather than to one transaction, and the highlight rides along to every file that checklist reaches. You can mention one person or a whole role, which is what makes it hold up on a team where the same job passes between coordinators.

The result is that nobody reads a full checklist hunting for their part; their work is already picked out for them. Worth knowing up front: a mention marks a task, it doesn't hand out access to the transaction the task sits on. When someone says a task you tagged them on never reached them, that's usually where the answer is.

How It Works

An @mention does two jobs, works for a person or a group, and — on its own — changes only how a task looks, not who can see it.

Two Jobs: Highlight, and Optionally Restrict

By itself, an @mention *highlights* a task for the mentioned person wherever they see it. Pair it with the*@mention* visibility type and it also *restricts* the task so only the mentioned people can see it. Highlighting and restricting are separate choices — the mention is the first, the visibility type is the second.

Mention a Person

To mention one person, type @ followed by any of these: their last name, their first initial plus last name, or the part of their Pipeline login email before the @. For Joe Smith at `josephksmith@ABCrealty.com`, that's `@smith`, `@jsmith`, or `@josephksmith`. When two people share a last name, use the first initial to keep them straight.

Mention a Group or Role

Add several @mentions in one task to reach several people — `@smith @williams @jacobs`. Or mention a role exactly as it's written in a person's Manage Users profile — `@officestaff` — to reach everyone in that role at once.

Highlight vs Reminders

An @mention by itself doesn't change who gets reminder emails — visibility does that. Unless you set the task's visibility to @mention, mentioning someone only highlights the task; it doesn't grant them access or reroute reminders.

@Mention Someone on a Template Task

Add an @mention to a task on the checklist template, so it appears on every transaction.

Who Can Do This: Admins with the *Fully manage checklists and templates* permission. Agents can't add @mentions.

To @mention someone on a template task:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Select [Checklists] from the left menu.
3. Click the name of the checklist that holds the task to open the template.
4. Type the person's name or role, prefixed with @, into the task name.
5. Click [Save Template].

The @mention now highlights the task for that person on every transaction the checklist reaches. To @mention on a single transaction instead, click [the pencil] to edit the task there and add the mention.

Use @Mention to Set Visibility

Turn an @mention into a visibility rule so only the mentioned people see the task.

Who Can Do This: Admins with the *Fully manage checklists and templates* permission.

To use an @mention to set visibility:

1. @mention the person, people, or role on the task.
2. Click [the eye icon] on the task and choose the [@mention] visibility type.
3. Click [Set Task Visibility], then save.

The task is now visible only to the mentioned people. See Task Visibility for the full list of types.

Hide @Mention Text

Tuck the @mention text out of sight to keep task names easy to read.

Who Can Do This: Anyone viewing the transaction or the Tasks page; the setting is remembered per viewer.

To hide @mention text:

1. On a transaction, click [⋮] at the top of the *Checklists* area, check [Hide @mention], then click [Done].
2. On the Tasks page, click [the @ icon] to hide the mention text there.

Pipeline remembers your choice and keeps mention text hidden until you switch it back.

Frequently Asked Questions

Can agents add @mentions to tasks?

No. Managing and editing tasks, including adding @mentions, is an admin function. Agents can work their tasks but can't add or change mentions.

Does @mentioning someone send them a reminder or give them the task?

No — on its own, an @mention only highlights. Whether someone gets reminders about a task, and whether they can see it at all, is decided by the task's visibility, not by the mention. To make a mention control access, set the task's visibility type to @mention.

Why isn't my @mentioned task showing on that person's task list?

Because the mention alone doesn't grant access. If the person isn't assigned to the transaction and the task's visibility isn't set to @mention, mentioning them just highlights a task they can't see. Set the task's visibility to *@mention* and it appears on their task list wherever they are, assigned to the transaction or not. SeeTask Visibility.

How do I mention a whole group or role?

Add several mentions, or mention a role. Type multiple @mentions in one task — `@smith @williams @jacobs` — to reach several people, or mention a role exactly as it's written in a person's Manage Users profile — `@officestaff` — to reach everyone in that role.

Can I hide the @mention text so task names are easier to read?

Yes. On a transaction, click [⋮] at the top of the *Checklists* area and check [Hide @mention]; on the Tasks page, click the @ icon. Pipeline remembers your choice until you switch it back.