

Task Visibility FAQ

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Visibility decides who sees a task and, with it, who gets reminded. Answers to the common questions about admin-only tasks, stray reminder emails, and giving someone a look without edit rights.

Can I make a task only admins can see?

Yes — set the task's visibility to [Admins]. Then only admins with the *Fully manage checklists and templates* permission see it, and agents never do. It's the right fit for internal to-dos and admin-owned dates you don't want cluttering an agent's view.

Why are agents getting overdue emails for tasks that aren't theirs?

Because the task is visible to them. Reminder emails follow visibility — if a task is set so an agent can see it, they'll be reminded when it's due or overdue, even if it's really an admin's job. Set those tasks to [Admins] so the reminders go only to admins.

Does visibility control who gets reminder emails?

Yes. Who can see a task is who gets daily reminders about it. Visibility is the single lever for both what shows on someone's Tasks page and what lands in their reminder email.

Will a master admin still see a task I've hidden?

Yes, always. Master admins on the account see every task no matter its visibility. Visibility narrows the view for everyone else, not for the master admin.

Can I let someone view checklist progress without letting them edit?

That's a user-permission setting, not a visibility type. Task visibility decides who *sees* a task; whether a person can edit, review, or delete tasks is controlled by their permissions in Manage Users. Give them view access to the transaction's location without the checklist-management permissions, and they'll see progress without being able to change it.

If I @mention someone, does that limit who sees the task?

Only if you also set visibility to [@mention]. An @mention on its own just highlights the task. To restrict the task to the mentioned person or role, set its visibility type to @mention. See [Task @Mentions](#).

Learn More

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

See [Task Visibility](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
