Task Visibility

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

Introduction

Not everything on a checklist is meant for everyone. The back-office steps a coordinator works through are noise to the agent whose deal it is, and it runs the other way too. Task visibility is the setting that decides, one task at a time, who sees each one.

Every task carries its own visibility, which is why a single checklist can serve two audiences at once. An admin sets it on the checklist template so the choice travels to every transaction that checklist reaches, and you can adjust it on one task when a deal needs something different. Visibility also decides who gets reminded, since a reminder email lists the tasks that person can see.

The result is that everyone opens the same file and finds their own share of the work in it. It's also the answer when an agent says they're being chased about something that was never theirs. The task is visible to them, and a change to its visibility stops both the sighting and the reminder. Nothing about that is a mistake on their part or yours; it's a setting that hasn't caught up with how you divide the work.

How It Works

Visibility is a per-task setting with a short list of choices, and it quietly decides who gets reminded, too.

Set It on the Template

The durable place to set visibility is the checklist template. Set it there and every transaction that gets the checklist inherits it, so you configure the rule once rather than task by task on each file. You can still change a single task's visibility directly on a transaction when a one-off calls for it.

Visibility Drives Reminders

Who can see a task is also who gets reminder emails about it. Set a task to*Admins* and only admins hear about it; set it to an agent role and the agent gets the reminder too. This is the lever to reach for when the wrong people are getting notices about a task that isn't theirs.

Master Admins Always See Everything

Whatever a task's visibility, master admins on the account can always see it. Visibility narrows the view for everyone else, not for the master admin.

What Each Visibility Type Means

Each type answers one question: who, besides the qualifying admins, can see this task?

- **Anyone** — everyone with access to the transaction: assigned agents and admins who can view the transaction's location.

- **Admins** — only admins with the *Fully manage checklists and templates* permission in the transaction's location.
- **Listing Agents** — only the assigned listing agent(s), plus those admins.
- **Selling Agents** — only the assigned selling agent(s), plus those admins.
- **Listing & Selling Agents** — only the assigned agents on either side, plus those admins.
- **@mention** — only the specific person, people, or role @mentioned on the task.

Master admins see every task regardless of the type you choose.

Set Task Visibility on a Template

> Set who sees a task on the checklist template, so it carries to every transaction.

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

To set task visibility on a template:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Select [Checklists] from the left menu.
3. Open the template you want to edit, or click [Add Template] to start a new one.
4. Click [the eye icon] next to the task.
5. Select the visibility type and click [Set Task Visibility].
6. Click [Save Template].

From now on, the task's visibility carries to every transaction the template touches.

Set Task Visibility on a Transaction

> Adjust who sees a single task that's already on a transaction.

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

To set task visibility on a transaction:

1. On the transaction, hover over the task and click [the eye icon].

2. Select the visibility type and click [Set Task Visibility].

3. Click [Save].

Only that task on that transaction changes — the template and other files stay as they are.

Task Visibility FAQ

Visibility is set on the template, comes in a handful of types, and decides who gets reminders. Answers to the common questions about admin-only tasks, why agents get certain emails, and read-only access. See Task Visibility FAQ.

Ways to Use Task Visibility

See Task Visibility at work inside a bigger job:

- Build a Checklist Only Certain People Can See