Checklist Access FAQ

Last Modified on 09/04/2026 11:06 am EDT

Seeing a checklist starts with being able to see the transaction, and per-task visibility narrows things from there. Answers to the common questions about admin-only tasks, why a user can't see a checklist that's been added to a file, and who sees @mentioned tasks.

How do I create tasks only admins can see?

Set the task's visibility to *Admins*. An admin task is visible only to admins with the *Fully manage checklists and templates* permission — agents don't see it on the transaction, on their Tasks page, or in their reminder emails. Set it on the checklist template so every transaction inherits it, or on a single task from the transaction's Checklists area.

Why is an agent getting reminder emails for a task that isn't theirs?

The task is visible to them — change its visibility. Daily reminders go to everyone a task is visible to. If an admin's task is set to *Anyone*, agents see it and get reminded about it. Set that task's visibility to *Admins* (or the specific agent role that owns it) and the wrong people stop being notified.

A user has access to the location but can't see a checklist added to a file. Why?

Location access isn't the same as being on that transaction. Having access to the location where a checklist template lives doesn't let someone see a specific transaction's checklist. To see it, the user has to be added to that transaction as an agent, or hold the *View all transactions for this location* permission. If they already have one of those, check the task's visibility type next — it may be set to a role they're not in.

Do master admins see every task?

Yes — always. A master admin sees every task on the account regardless of its visibility setting. Visibility only narrows tasks for agents and location admins.

Will an @mentioned person see a task if they're not on the transaction?

They still need access to the transaction first. An @mention visibility task is aimed at the person or role you mention, but seeing any of a transaction's tasks depends on being able to see that transaction — as an assigned agent or an admin who can view all transactions in the location. @mention narrows *which* tasks show for someone who can already reach the file; it doesn't grant access on its own.

Can each transaction coordinator see only their own agents' tasks?

Not with a single per-coordinator filter, but you have options. Task visibility, @mentions, and separating agents into their own locations are the levers. Many offices give each coordinator the *View all transactions* permission in only their group's location, so each one sees just that location's transactions and tasks. If that's a big part of your workflow, email us and we'll help you map it out.

Why can agents see checked-off items on the default checklist but not on our custom one?

It comes down to the tasks' visibility on the custom template. If a custom template's tasks are set to*Admins* (or another role), agents won't see them or their checkmarks. Set those tasks to *Anyone* or the appropriate agent role on the template so agents can follow along.

Learn More

See Checklist Access and Checklist Permissions.

Still Have Questions?

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