Checklist Access

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Access decides who can see a transaction's checklist and each task on it — and in Pipeline, that comes down to who's on the transaction and the visibility set on each task.

Introduction

A checklist can hold work for four different people, and most of them don't need to see all of it. The agent doesn't need the broker's compliance items, the coordinator doesn't need the agent's reminders, and a list that shows everyone everything is a list people stop reading.

Access is what keeps each person's view of a checklist to the part that's theirs. It works in two layers, and they answer different questions: whether you can open the transaction at all, and then which of its tasks you see once you're in. Keeping those separate is deliberate, because reach across the account and detail on one file are decisions that belong to different people.

Set up well, everyone opens the same transaction and each one sees a list they can act on. Nobody is guessing which items are theirs, and nothing is hidden that someone actually needed.

How It Works

Two layers decide it: who can open the transaction, then the visibility set on each task.

Seeing a Checklist Starts With Seeing the Transaction

A checklist rides on its transaction, so you see it only if you can see that transaction — as an agent added to it, or as an admin with the *View all transactions for this location* permission. Access to the location a checklist template lives in isn't enough on its own. For the full picture of who can open a transaction, see Transaction Access.

Who Sees Each Task

Within the people who can see the transaction, an admin sets a**visibility type** on each task.

Visibility	Who sees the task
Anyone	Everyone with access to the transaction: assigned agents, and admins who can view all transactions in the location.
Admins	Only admins with the *Fully manage checklists and templates* permission in the location.
Listing Agents	The assigned listing agent(s), plus those admins.
Selling Agents	The assigned selling agent(s), plus those admins.
Listing & Selling Agents	The assigned agents on either side, plus those admins.
@mention	Only the person, people, or role @mentioned on the task.

> A master admin always sees every task on the account, no matter what visibility you set. Visibility narrows the task for everyone else.

Where Visible Tasks Show Up

You see the tasks you're allowed to see in three places: the transaction's Checklists area, your Tasks page, and your daily task reminder emails. A task whose visibility doesn't include you appears in none of them, reminders included. That's how you keep an agent from being nagged about work that belongs to an admin.

Set Task Visibility on a Checklist Template

> Set who sees a task once, on the template, and every transaction that gets the checklist inherits that visibility.

> **Who Can Do This**: A master admin, or an admin with the *Fully manage checklists and templates* permission.

To set task visibility on a checklist template:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].

2. Click [Checklists] from the left menu.

3. Click the name of the template you want to edit, or click [Add Template] to build a new one.

4. Click the [eye] icon on a task to edit its visibility.

5. Select the visibility type you want, then click [Set Task Visibility].

6. Save the template.

From now on, whenever that template lands on a transaction, its tasks carry the visibility you set.

Set Task Visibility on a Single Transaction

> Adjust who sees a task that's already on a transaction, without touching the template it came from.

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

To set task visibility on a single transaction:

1. Open the transaction and go to its Checklists area.

2. Hover over the task and click the [eye] icon.

3. Select the visibility type you want, then click [Set Task Visibility].

4. Click [Save].

The change applies to this transaction only, and leaves the underlying template unchanged.

Checklist Access FAQ

Seeing a checklist starts with being able to see the transaction, and 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. See Checklist Access FAQ.

Ways to Use Checklist Access

See Checklist Access at work inside a bigger job:

- Run Different Checklists for Each Office