Completed Tasks FAQ

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A completed task is one an admin has verified and checked off. Completed tasks drop off your Tasks page, and you can hide them on transaction checklists. Answers to the common questions about hiding them, finding them again, and who can mark a task complete.

How do I hide completed tasks on checklists?

A master admin turns on the setting in Admin / Settings. Click the [Gear] in the upper-right corner, go to [Admin / Settings], check [Hide completed tasks in transaction checklists], and click [Save Settings]. It applies account-wide.

Where did my completed tasks go — how do I see them again?

Click [Show completed tasks] on the checklist. Hidden completed tasks are never deleted — showing them brings them back into view, and refreshing the page hides them again.

Do completed tasks still appear on the Tasks page?

No. The *Tasks* page tracks only overdue and upcoming tasks, so a task drops off that list once it's complete — and stops showing up in daily reminder emails.

What's the difference between a completed task and an agent-checked one?

A completed task is admin-verified and fully checked; an agent-checked task is still waiting on approval. When an agent checks a task it's marked ready for review, not done — an admin has to verify and check it off to complete it. See [Agent Checked Tasks].

Who can mark a task complete?

The master admin, or admins with the *Fully manage checklists and templates* permission. Agents can agent-check their tasks, but only these admins can check a task off as complete.

Learn More

A completed task is one an admin has verified and checked off — and Pipeline can hide completed tasks so your checklists stay clean.

See [Completed Tasks]

Still Have Questions?

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