Completed Tasks

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

Introduction

Checking a task off is the last thing that happens to it. An admin looks at what came in, decides the item is genuinely handled, and marks it done. That's the account's record that the work is finished, not just that a document turned up.

Completion is what the rest of Pipeline reads. A completed task drops off the Tasks page and counts toward how far along the transaction is, so the numbers on a file move as the real work moves. On a long checklist the done items pile up quickly, which is why an account can be set to hide them on transaction checklists and leave only the open work on screen.

Before you turn hiding on, know that it applies across the account, so agents see the shortened list too. What stays on screen is the work still to do rather than everything the deal ever needed. If someone tells you the items you checked off have disappeared, that's the setting rather than anything going wrong, and completed tasks can be brought back into view.

How It Works

Completing a task marks it done, quiets its reminders, and gives you the option to tuck it out of sight.

What "Complete" Means

A task is complete once an admin checks it off and its checkbox becomes fully checked. That's different from an agent-checked task, which the agent has marked ready but which still needs an admin's approval to be finished.

Completed Tasks Leave the Tasks Page

The *Tasks* page tracks only overdue and upcoming tasks, so once a task is complete it drops off that list — and stops appearing in daily task reminder emails.

Hiding Completed Tasks

By default, completed tasks stay visible on a transaction's checklist. A master admin can turn on an account-wide setting that hides completed tasks instead, cutting clutter and making long checklists easier to scan.

Showing Them Again

Even when completed tasks are hidden, they're never gone — click [Show completed tasks] on the checklist to bring them back into view, and refresh the page to hide them again.

Hide Completed Tasks on Transaction Checklists

Turn on the account setting to hide completed tasks by default on every transaction checklist.

Who Can Do This: The master admin. This setting applies account-wide.

To hide completed tasks on transaction checklists:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Check the option to [Hide completed tasks in transaction checklists].
3. Scroll down and click [Save Settings].

Completed tasks are now hidden by default on transaction checklists across your account.

Show Completed Tasks After Hiding

Bring hidden completed tasks back into view on a checklist.

Who Can Do This: Anyone who can view the checklist.

To show completed tasks after hiding:

1. On the transaction's checklist, click [Show completed tasks].
2. To hide them again, refresh the page.

Completed tasks reappear until you refresh, so you can check a record without changing the account-wide default.

Frequently Asked Questions

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.