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.

Completed Tasks FAQ

Completed tasks are admin-verified, drop off the Tasks page, and can be hidden on checklists. Answers to the common questions about hiding them, finding them again, and who can mark a task complete. See Completed Tasks FAQ.