Find One Person's Tasks Across the Whole Account

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A Pipeline task has no "assigned to" field, so one person's work is found two ways — by the @mention that names them, or by the transactions they're on.

Introduction

A broker wants to know what's on the coordinator's plate. Someone's leaving next month and their tasks need a new owner. A department head wants their team's open work in one list. All three land on the same question: show me one person's tasks across every transaction, without opening deals one at a time.

Pipeline doesn't assign tasks to people. There's no owner field to filter on. What it has instead are the two footprints a person leaves on a task: the @mention in the task's name, and their presence as an agent on the task's transaction. Those return different lists, and picking the right one is most of the job.

You'll only ever find tasks on transactions you can already see, so none of this opens a door your permissions don't. If you're a master admin, or you have permission to view all transactions, that's the whole account.

When to Use This

- A team member is leaving and you need to find everything @mentioned to them so it can be handed over.
- You manage a role or a department — conveyancing, listings, closings — and want its open work in one list.
- You want to know what an agent still owes you across all their deals.
- You're setting up one person's calendar sync and need their filtered task list first.

> Want your own list rather than someone else's? See Work Your Own Task List From One Page.

1. Decide Which of Their Tasks You Mean

Start here, because the two readings use different tools and hand back different lists.

Tasks that @mention them are the work they've been handed. A task named "Order title @marci" is Marci's, whichever agent's deal it sits on. This is what people usually mean by "her tasks," and it's the right reading for a coordinator, an office manager, or anyone whose job spans other people's transactions.

Tasks on their transactions are every dated task on every deal where they're listed as an agent — including tasks nobody @mentioned and tasks meant for someone else entirely. This is the right reading when you're reviewing an agent's pipeline.

The two overlap, but neither contains the other. Pick the one that matches the question you were actually asked.

2. Search for the Tasks That @Mention Them

Searching the Tasks page for someone's handle returns every task naming them, across every transaction you can see. Search `@` plus their last name to find one person, or `@` plus a role name to catch everyone who holds that role.

Reach for the search rather than a filter button here, and not only because the person isn't you: the search reads the whole task list, while the *Your @ Tasks* filter button stops at the first 1,000 tasks. On a large account that difference is the difference between a complete answer and a quietly short one.

Narrow the Tasks page to an exact set — search by task or transaction name, then filter by @mention, agent, due date, status, and more.

See Tasks Search

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See Task @Mentions

3. Filter by Agent Name for the Deals They're On

When you want an agent's pipeline instead of a person's workload, filter the Tasks page by**Agent Name**. Start typing the name, pick it from the list, and you'll get the tasks on every transaction they're listed on.

Only tasks with a due date reach the Tasks page, so an undated task won't turn up in this list. It hasn't gone anywhere — it's still on its transaction, waiting.

Narrow the Tasks page to an exact set — search by task or transaction name, then filter by @mention, agent, due date, status, and more.

See Tasks Search

4. Narrow to the Work They've Already Checked Off

Stack the *Agent Checked* filter on top of the agent-name filter and the list drops to the tasks that agent has marked done on their end — the queue that's waiting on your review. It's the quickest answer to "what has she finished?" that doesn't involve walking her deals one by one.

When an agent checks off their own task, Pipeline flags it as agent-checked — done on the agent's end, waiting on an admin's approval.

See Agent Checked Tasks

5. Save the Search as a Custom Task Shortcut

If it's a question you'll be asked again — and a departmental task list always is — save the view instead of rebuilding it. A custom task shortcut stores the search, filter, and sort together and puts them in the *Custom Shortcuts* menu on the left of your Home, Transactions, and Tasks pages.

Save one per person or per role you track — the person's name reads well as the shortcut name — and the next time someone asks, the answer is a click.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Task Shortcuts