Tasks List FAQ

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The Tasks page is your personal list of every task with a due date, across all your transactions. Answers to the common questions about missing tasks, due-date colors, who sees what, and checking tasks off.

Why isn't my task showing on the Tasks page?

It most likely has no due date. Only checklist items with a due date appear on the Tasks page. The task still lives on its transaction — add a due date to it and it'll show up here.

What do the different due-date colors mean?

Color shows urgency: red is overdue, yellow is due soon, gray is due later.Tasks are sorted by due date with the earliest first, so the most pressing work sits at the top.

Does everyone on my team see the same Tasks page?

No — each user has their own. You see only the tasks you're allowed to view. Agents see their upcoming and overdue tasks that haven't been agent-checked; admins see everything, including tasks agents have already checked off.

Can I change which columns show on the list?

Yes. Click [Columns], check the fields you want and uncheck the ones you don't, then click [Done]. Your choices shape the view without changing the tasks themselves.

Who can check a task off from the Tasks page?

Admins who can fully manage checklists and templates. They click the checkbox beside the task's name. Agents don't check off here — they agent-check tasks on the transaction to flag them ready for an admin's review.

How do I narrow the page to specific tasks?

Use the search, filter, and sort options on the page. You can search by task or transaction name and filter by @mention, agent, due date, status, and more — see Tasks Search.

Learn More

The Tasks page gathers every task with a due date across all your transactions in one place — shaped by the columns you show and the order you sort.

See Tasks List

Still Have Questions?

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