# Tasks List

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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.

## Introduction

The work you owe is scattered across dozens of transactions, and opening each one to find out what's due is a rough way to start a morning. The Tasks page is the other view of that same work: one list, every dated task from every transaction you can reach, ordered by when it comes due.

It's built as a calendar rather than an inventory, which explains most of what you notice about it. A task earns its place on the page by having a due date, and anything undated stays back on its transaction. The list is also filtered to what your access already covers, so an agent's page is short and an admin's can run very long.

One page stands in for the twenty you'd otherwise open. You can shape it as well: which columns show, how the list sorts, and how narrow you cut it are all yours to set. And when a task you expected isn't on the page, the due date is almost always the reason rather than the task or your access.

## How It Works

Think of the Tasks page as a live to-do list built from your checklists. It reads across every transaction, shows the tasks that carry a due date, and gives you controls to shape what you see.

### What Lands on Your Tasks Page

Only checklist items that have a due date appear here. A task with no due date still lives on its transaction — it just won't show up on this list. The page pulls from every transaction you have visibility to, so it's a single view across all your active work.

### Reading the Due Dates

Tasks are sorted by due date, earliest first. The date color tells you the urgency at a glance:**red** is overdue, **yellow** is due soon, and **gray** is due further out.

### What You See vs. What Admins See

The page is personal. Agents see their upcoming and overdue tasks that haven't been agent-checked yet. Admins see everything — including tasks agents have already checked off — so they can review and approve completed work.

### The Columns You Choose

Use [Columns] to show the task fields that matter to you and hide the ones that don't, so the page reflects the way you work.

### Narrowing to an Exact Set

To zero in on specific tasks — by agent, due date, @mention, status, and more — use the search, filter, and sort options on the page. See Tasks Search.

## Show or Hide Columns

> Pick which task fields appear as columns on the Tasks page.

> **Who Can Do This**: Anyone who can view the Tasks page.

To show or hide columns:

1. Click [Tasks] from the top menu.

2. Click [Columns].

3. Check the columns you want to see, and uncheck the ones you don't.

4. Click [Done].

The page now shows only the columns you checked. Unchecked fields still live on each task — they're just hidden from this view.

## See Who's Assigned to a Task

> Check which agent's transaction a task belongs to, right from the list.

> **Who Can Do This**: Anyone who can view the Tasks page.

To see who's assigned to a task:

1. Click [Tasks] from the top menu.

2. Hover over the [Agents] column for a task to see which agent(s) are assigned to that task's transaction.

To pull up every task tied to one agent instead, filter by agent name — see Tasks Search.

## Check Off a Task

Mark a task complete without leaving the Tasks page.

**Who Can Do This**: Admins with permission to fully manage checklists and templates.

To check off a task:

1. Click [Tasks] from the top menu.

2. Click the checkbox to the right of the task's name to mark it complete.

Agents don't check tasks off here — they agent-check tasks on the transaction itself to flag them ready for an admin's review.

## Tasks List FAQ

The Tasks page shows every task with a due date that you're allowed to see, sorted by date and color-coded by urgency. Answers to the common questions about missing tasks, due-date colors, who sees what, and checking tasks off. See Tasks List FAQ.

## Ways to Use Tasks List

See Tasks List at work inside a bigger job:

- Work Your Own Task List From One Page