

Tasks Search FAQ

Last Modified on 09/04/2026 11:06 am EDT

Search finds a task by name, filters carve the list by its details, and sort arranges what's left. Answers to the common questions about finding one task, seeing only your @mentions, why "Due Today" leaves out overdue work, and filtering to one agent.

How do I find one specific task?

Click [Search] on the Tasks page and type the task or transaction name. Pipeline looks in both the *Task Name* and *Transaction Name* fields, then click [Search Tasks] to see the matches.

Can I see only the tasks I've been @mentioned on?

Yes — click [Filter], then [Your @ Tasks]. The list narrows to tasks where you've been @mentioned. If someone's mentions aren't showing, check that the filter matches exactly how they were @mentioned on the task — the @mention has to line up with their username.

Why doesn't "Due Today" show my overdue tasks?

By design — the [Due Today] filter shows only tasks due today, not overdue ones. To see overdue and due-today work together, use the default Tasks page, which lists tasks by due date with overdue at the top, or save separate shortcuts for each view.

Can I filter to just one agent's tasks?

Yes — use the Agent Name filter. Click [Filter], start typing the agent's name in the *Agent Name* field, select them, then click [Filter Tasks] to see only tasks on that agent's transactions.

Can I combine more than one filter?

Yes — stack as many as you need. Select every option that applies, click [Filter Tasks], and the list shows only the tasks that match all of them — for example one agent's key dates due this month.

Can I save a search I run all the time?

Yes. After you run a search or filter, you can save it as a shortcut with Pipeline's account-wide search tools, so it's one click away next time.

Can I sort by something other than due date?

Yes — click [Sort] and pick a field. The list rearranges by whatever you choose; leave it alone to keep the default due-date order, earliest first.

Learn More

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](#)

Still Have Questions?

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