Work Your Own Task List From One Page

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Your Tasks page shows every task you can see, which on a busy account means everyone's work. A little setup turns it into your list, one click from Home.

Introduction

If you're an admin, an office manager, or a transaction coordinator, you can see a lot of transactions — and the Tasks page shows you every task on all of them. Your own deadlines sit buried among the agents' work, and you rebuild the same mental filter every morning just to find what you owe today.

Nothing is wrong with your setup. The Tasks page is built to show you everything you have visibility to, and a task carries no "assigned to" field, so Pipeline has no way to guess which of those tasks are yours. You tell it: @mention yourself, filter to those tasks, and save the result so it's waiting for you tomorrow.

None of this changes what anyone else sees. Filtering shapes your own view of the page; the tasks stay exactly where they are, on the transactions they belong to, visible to everyone they were already visible to.

When to Use This

- You're an admin, office manager, or transaction coordinator whose Tasks page shows every agent's work alongside your own.
- Your *Tasks Due Today* count is counting other people's tasks, not yours.
- You want your daily list one click away instead of rebuilt from scratch each morning.
- You want your own due dates on your calendar without the whole office's coming along.

> Looking for someone *else's* tasks — an agent's, or a whole role's? That's the other direction: see Find One Person's Tasks Across the Whole Account.

1. Start From the Tasks Page

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

2. Tag Your Tasks With Your @Mention Handle

An @mention is what makes "mine" something Pipeline can find. Type `@` and your name into a task's name and that task turns green for you everywhere it shows up — on the transaction, on your Tasks page, and in your daily reminder email. Use `@` and a role name instead when a whole role shares the work.

Tag in two places: in the checklist template, so the @mention carries onto every transaction from here on, and on the tasks already in flight that you want on today's list.

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

See Task @Mentions

3. Filter the Page Down to Your Tasks

Filter the Tasks page by *Your @ Tasks* and everything that doesn't @mention you drops away. Stack more filters on top if you want to go further — a due-date range, a transaction status, a side.

One ceiling worth knowing: the *Your @ Tasks* filter button reads only the first 1,000 tasks. If your account is big enough that the button starts missing things, search your handle instead — the search has no such limit. The how-to is in Find One Person's Tasks Across the Whole Account; point it at your own handle.

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. Save the View as a Custom Task Shortcut

This is the step that makes it stick. A custom task shortcut saves the search, filter, and sort you just built and drops it into the *Custom Shortcuts* menu on the left of your Home, Transactions, and Tasks pages. Tomorrow your list is one click instead of five.

Shortcuts are personal — every Pipeline user saves their own, so yours are yours alone.

Save more than one if your day has more than one shape. A separate *Due Today* shortcut and *Overdue* shortcut is the usual pair, because the *Due Today* filter deliberately shows only what's due today and leaves overdue work out of it.

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

5. Sync Your Own List to Your Calendar

Filter first, then sync, and only the filtered tasks travel — so your calendar fills with your work instead of the office's. The calendar links sit at the top of the Tasks page and read whatever list is showing when you click one.

See your Pipeline task due dates right inside the calendar you already live in — Google, Apple, Outlook, or any app that takes a subscription link.

See Calendar Syncing