Show Each Person Only the Tasks That Are Theirs

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Three layers decide who sees and works a task: what a person is allowed to do with checklists, who each task is visible to, and who it is @mentioned to. Set them once on the template and every checklist becomes a short list of what is yours.

Introduction

A checklist that shows everyone everything is a checklist people stop reading. The agent scrolls past the broker's compliance steps, the coordinator scrolls past the agent's reminders, and by the third file nobody trusts the list to be about them. The daily reminder email inherits the same problem, and a reminder about someone else's work is the fastest way to teach a person to ignore reminders.

Pipeline gives you three layers to fix that, and they stack. Permissions decide what a person can do with checklists at all. Visibility decides, task by task, who sees each one, and reminders follow visibility. An @mention marks a task as one person's, and paired with the @mention visibility type it becomes an assignment. Two company settings finish the job: one hides completed tasks, and one keeps one group's checklists out of another group's dropdown.

Set all of it on the checklist template and it rides onto every transaction the checklist reaches. Nobody sets it file by file, and everyone opens the same deal to a list they can act on.

When to Use This

- Agents say the checklist is too long to read, and the part that is theirs is buried in it.
- An agent is being reminded every morning about a task that belongs to the office.
- You want a task to belong to one coordinator, and only that coordinator to see it.
- Two teams or two transaction coordinators share one account and one should not see the other's checklists.
- Completed tasks crowd the checklist and the open ones are hard to find.

1. Give Each Person the Right Checklist Permission

Give agents Assign checklist templates to transactions and keep Fully manage checklists and templates with admin staff, and Give a TC Exactly the Checklist Access They Need explains what each one allows.

Permissions decide what someone can do with checklists: apply them to transactions, build and edit templates, and check tasks off. You set them per user, per location.

See Checklist Permissions

2. Set Who Sees Each Task, on the Template

Open the template under [Admin / Settings] → [Checklists], click the [eye icon] on a task, and pick a visibility type. Anyone is the default. Admins limits it to admins with the full checklist grant. Listing Agents, Selling Agents, and

Listing & Selling Agents limit it to the assigned agents on that side, and those admins still see it. @mention limits it to whoever is mentioned on the task. Master admins see every task whatever you choose. Save the template, and every transaction that gets the checklist inherits the setting. You can still change one task on one transaction from its [eye icon] when a deal needs it.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility

3. Let Visibility Decide the Reminders

A task appears in three places for the people who can see it: the transaction's Checklists area, their Tasks page, and their daily task reminder email. A task they cannot see appears in none of them. That is the whole fix when an agent is being chased about an office step: set that task to Admins, or to the agent role that owns it, and the sighting and the reminder both stop.

Access decides who can see a transaction's checklist and each task on it — and in Pipeline, that comes down to who's on the transaction and the visibility set on each task.

See Checklist Access

4. Mark Whose Task It Is With an @Mention

Type @ and a name into the task name on the template and the task turns green for that person on the transaction, on their Tasks page, and in their reminder email. Four forms work: the last name, the first initial and last name for two people who share one, the part of their login email before the @, and their role exactly as it reads in Manage Users. Mention a role and every person in it sees the highlight, which is how a task follows the job when the coordinator changes.

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

See Task @Mentions

5. Turn the Mention Into an Assignment

By itself an @mention only highlights. Set the same task's visibility to @mention and only the mentioned people can see it, so the task is theirs and nobody else's. Master admins still see it. Other admins do not. Two things to know before you lean on it: the mention has to match the person's handle or role exactly, and the reminder still needs the person's daily task email turned on, which is the usual reason a correctly assigned task seems to reach no one.

Decide once, on the template, who owns each task — and let that decision ride onto every transaction the checklist touches.

See Assign Every Task to the Right Person From the Template

6. Hide the Tasks That Are Done

A master admin checks Hide completed tasks in transaction checklists under [Admin / Settings] and every checklist opens showing only the open work. Completed tasks are never gone. Click [Show completed tasks] on any checklist to bring them back, and the page hides them again on refresh.

A completed task is one an admin has verified and checked off — and Pipeline can hide completed tasks so your checklists stay clean.

See Completed Tasks

7. Keep One Group's Checklists Out of Another's Dropdown

By default any checklist template can be added to any transaction, whatever location either is in. When two teams or two coordinators should not see each other's checklists, put each group's people, transactions, and templates in their own location, then have a master admin uncheck Show checklists from all locations in the Add Checklists dropdown menu under [Admin / Settings]. The add-checklist dropdown on a transaction then offers only templates from that transaction's location. A template parked in a location a person has no checklist grant for also drops off their Checklists page.

To hide one group's tasks from the other on transactions they share, follow Build a Checklist Only Certain People Can See.

Add a Location to give an office, team, or group its own users, transactions, and permissions.

See Adding a Location