Set Task Visibility

SUMMARY

An admin can control the visibility of each task on checklist templates. This adds an extra layer of privacy, organizes tasks more effectively, and eliminates involvement of users not responsible for tasks.

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Video: Set Task Visibility

① 1:25

Task Visibility

Visibility settings allow admins to determine who sees a task. An admin can specify the visibility of tasks via checklist templates or directly on transactions.

Set Task Visibility on Checklist Templates

To set visibility for a task on a checklist template:

1 Go to Admin / Settings by clicking your name in the upper right corner, then [Admin / Settings].

2 Click [Checklist Templates] from the left menu.

Click the name of the template you would like to edit or click [Add Template]to create a new template.



4 Click the eye icon to edit a task's visibility.

5 Select the desired visibility type and click [Set Task Visibility].

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	Edit Listing Checklist				
- People	Checklist Template Information				
Manage Locations	Location *				
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- Customize	Checklist Name *				
Company Settings Transaction Statuses Transaction Labels	Listing Checklist				
	Automatically apply this checklist to transactions Based on Status Based on Label				
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- Templates	Automatically apply to transactions in all locations				
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- Financials					
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	Seller's Disclosure				
	Form 34Z				
2 Commission Basis	+ Add more tasks				
+ Backups	+ Bulk add tasks Selling Agents				
- Billing	Listing & Selling Agents Save Template Cancel @mention				

6 Save the updated template. Now when this checklist template is applied to transactions, the visibility of its tasks will be carried over to those transactions.



Set Task Visibility on Transactions

To set visibility for a task that's already been added to a transaction:

1 Go to the transaction, hover over the desired task and click the eye icon for the desired task.

2 Select the desired visibility type, and click [Set Task Visibility].

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o View Transaction	123 Oak St., Tope	ka. KS 66604 Added on Jan 9, 2020 by Charles Leffer	-		
Edit Transaction					
Upload Docs	email docs and notes to this transaction: 4508.	212-111445-1X-2005@docs.papenesspipeline.com			
Assign Docs	MLS #: 313371	Listed On:	Aug 10, 2020		coversheet
🕸 New Offer	Label: Residential	Accepted On:	Aug 18, 2020		
Transaction History	Status: Active Side: Listing & Buying	Closed On: Close Date on CD/	Sep 1, 2020 A: Feb 13, 2020		
🗑 Deleted Docs	Location: Austin, TX				
Received Emails (0)	Seller: Sally Seller				
Download Transaction	Buyer: Brad Buyer				
Update Commissions	List Price: \$100,000	Total Commission	: \$7,000		
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Listing & Selling Agents	9/2 Carol Admin	✓ carol+cake57@paperlesspipeline.com			
@mention	Charles Leifer	Charles@paperlesspipeline.com	7858408853		
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Visibility Types

The visibility type descriptions below outline who can see tasks on transactions:

Anyone

Tasks set as visible to *Anyone* are visible to anyone that has access to the transaction. *Anyone* tasks can be seen by agents assigned to the transaction and admins who have the *View all transactions* permission for the transaction's location.

Admins

Tasks set as visible to Admins are visible only to admins who have the Fully manage checklists and templates permission in the transaction's location.

Listing Agents

Tasks set as visible to *Listing Agents* are visible only to the assigned listing agent(s) and admins who have the *Fully manage checklists and templates* permission in the transaction's location.

Selling Agents

Tasks set as visible to *Selling Agents* are visible only to the assigned selling agent(s) and admins who have the *Fully manage checklists and templates* permission in the transaction's location.

Listing & Selling Agents

Tasks set as visible to *Listing & Selling Agents* are visible only to the assigned agent(s) and admins who have the *Fully manage checklists and templates* permission in the transaction's location.

@mention

Tasks set as visible to @mention are visible only to the person, people, or role @mentioned on the task.

All task are always visible to master admins on the account regardless of the task's visibility setting.