Highlight a Person's Task by @mentioning Them

SUMMARY

An admin can use @mention to highlight or assign tasks to users or groups.

Video: Highlight a person's Task by @mentioning Them

🕐 3:17

What is @mention?

An admin can use @mention to **make a task appear more prominently to a specific user or user group** by @mentioning their name or role within that task. @mentioning users on a task will highlight the task for the user on the transaction, on the *Tasks* page, and in received emails.

An admin can also use @mention to **set a task to only be visible to a specific user or user group** Once someone is @mentioned on a task, the task's visibility can be set to [@mention] so that the task is only visible to the @mentioned user(s).

Mention a Person in a Task

To mention a specific person in a task, use any of the following:

- **Last name**
- **First initial + last name**
- **The portion of their Pipeline login email address that appears before the @**

For example, for Joe Smith who has the email address, josephksmith@ABCrealty.com, enter any of the following: @smith, @jsmith, @josephksmith
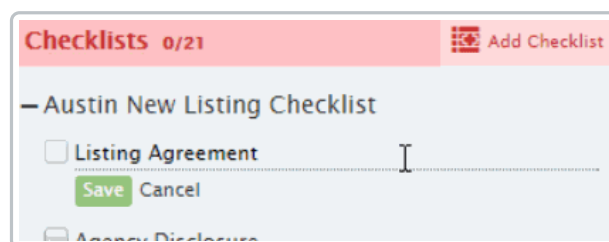
@lastname will work for most cases where you want to address a specific user. But if you have multiple users with the same last name, use their first initial and full last name. For example, use @jsmith to mention Joe Smith and @asmith to mention Anne Smith.

Mention a Group of People in a Task

- **Enter multiple separate @mentions using the method above**
  - *For example: @smith @williams @jacobs*
- **Enter users' role (as defined in the Role field of their Manage Users profile).**
  - *For example: @officestaff*

Where to Use @mention

To @mention a specific user or group of users, edit the task name on either the checklist template (if you need the @mention to be present on all transactions where the task is used) or directly on the transaction (if you need the @mention to only be for a specific transaction).

To edit a task on a checklist template:

1 **Click your name in the upper right corner then [Admin / Settings].**

2 **Click [Checklists] from the left menu.**

3 **Click the name of the checklist that contains the task** to open the checklist template.

4 **@mention the user's name or role in the task name.**
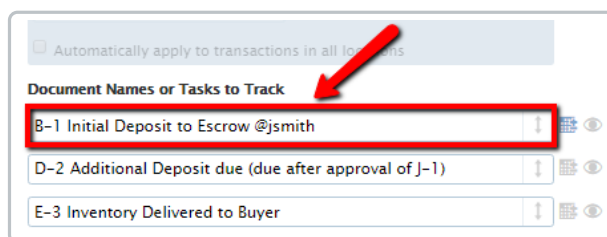
To edit a task that's already been added to a transaction:

1 **Click the [Pencil] to edit the desired task.**

2 **@mention the user's name or role in the task name.**

Send Tasks with @mentions

When sending a note or email from a transaction, if you append complete, overdue, or incomplete tasks, the recipient's @mentioned tasks will be automatically highlighted in the message.

Use @mention to Set Visibility

Use the @mention feature to set a task to be visible to a specific user, multiple users, or to a group of users (Role). Tasks assigned the @mention visibility are only visible to the person or people @mentioned on the task.

Learn how to Set Task Visibility here →

View Highlighted Tasks

Users who are @mentioned on tasks will see their tasks automatically highlighted wherever tasks are shown:

On Transactions

On Emails

On the Tasks Page

Users can click [@ Your Tasks] to view only tasks where they are @mentioned. They can also sync their @mentioned tasks to their external calendar by selecting [@ Your Tasks] then selecting the appropriate sync option. Learn how to Sync and Unsync Tasks with Calendars →
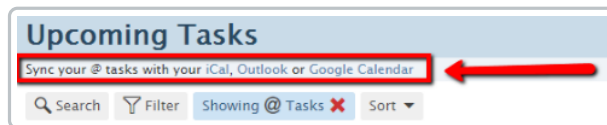
Clicking [Showing @ Tasks] turns off the filter and shows all tasks you have access to view.

Hide @mention Text

You can choose to hide @mention text on transactions and on the Tasks page. Hiding @mention text reduces clutter within your task names and makes them easier to read.
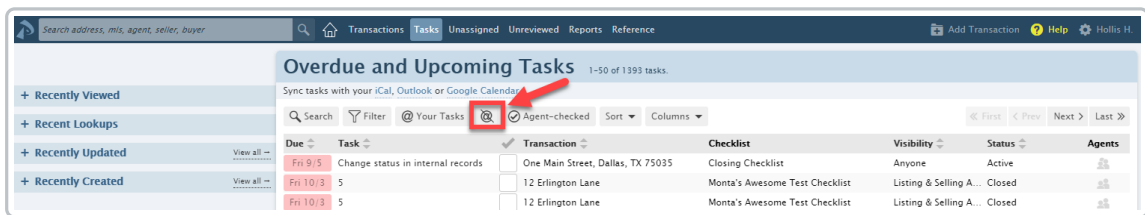
To hide @mention text on the transaction:

1 **Click the gear** to the right of the *Checklists* section in the left menu.

2 **Select [Hide @mention], then click [Done].**

To hide @mention text on the Tasks page:

1 **Click the @ icon.**

The system will remember your setting to hide or unhide the @mention text and keep it that way unless you change it.

FAQ

Q: Can agents add @mentions to tasks?

A: No. The ability to manage and edit tasks (including adding @mentions) is an admin function and is not suitable for agents.

Q: Does @mentioning someone trigger reminders to be sent to them? Does it prevent reminders from being sent to others?

A: The @mention feature highlights tasks for the users who are @mentioned. Unless the visibility is also set to [@mention], it does not impact whether reminders are sent or not nor who they are sent to. Who receives reminders is determined by who has visibility to a task. Learn how to Set Task Visibility here →

Unless you set the visibility of the task to @mention, using @mention only highlights a task and doesn't grant visibility. Learn how to Set Task Visibility here →