

# Highlight a Person's Task by @mentioning Them

## SUMMARY

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

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## 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).

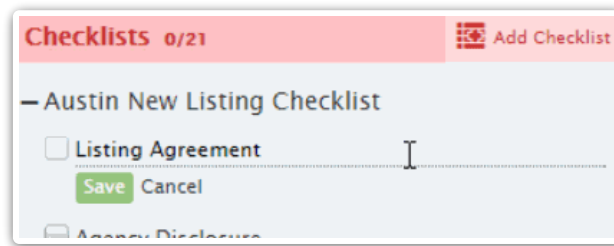
## Mention a Person in a Task

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

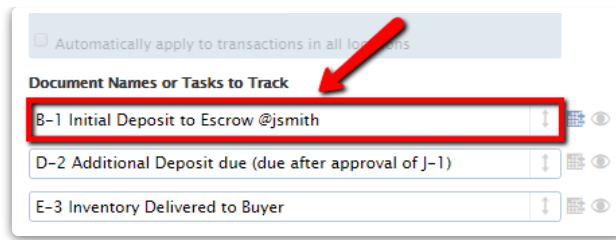
- Enter multiple separate @mentions using the method above
  - For example: @smith @williams @jacobs
- Enter users' role (as defined in the Role field of their Manage Users profile).
  - For example: @officestaff

## 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 Go to **Admin / Settings** by clicking 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.

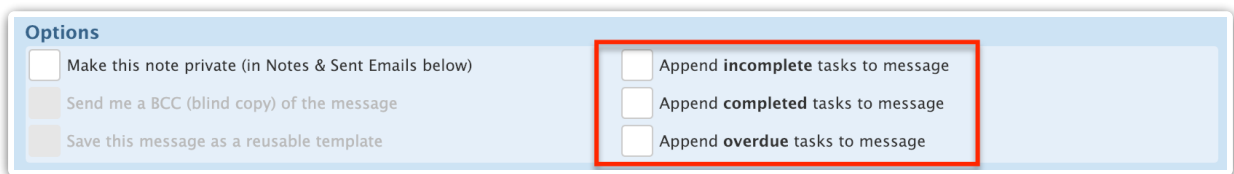


To edit a task that's already been added to a transaction:

- 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

**Checklists 0/8** Add Checklist

**Listing checklist**

- Listing Agreement @rmcwhirter 9/7
- Seller's Property Disclosure @rmcwhirter 9/5
- Agency Disclosure @rmcwhirter 9/14
- Lead-based Paint Disclosure (if applicable)
- Mold Disclosure
- Financial Addendum @rmcwhirter 9/9
- MLS Info 9/7
- Lockbox Keys 10/31

Add doc name or task

**Listing Agents**

- Jimin Cricket (h
- Rachel McWhirte
- limited User

**Selling Agents**

- Mary Clark
- Juniper Cornico
- Tim Johnson (ou

**MLS FILE:**

**Sale Price:** \$60

**Buyer:** Sor

**Seller:** Jan

## On Emails

Mail 1 of 5

**COMPOSE**

**Inbox**

- Starred
- Sent Mail
- Drafts (1)
- SAVED
- To Read

More labels

Rachel

**Tasks due by Sat, Sep 3**

**Today's Tasks**

Task	Transaction	Visible To	Due On
Agency Disclosure @jsmith	8956 Bluebonnet Lane, Austin, TX 78...	Listing Agents	Fri, Sep 2
Financial Adendum @jsmith	8956 Bluebonnet Lane, Austin, TX 78...	Anyone	Fri, Sep 2
MLS Info @jsmith	8956 Bluebonnet Lane, Austin, TX 78...	Anyone	Fri, Sep 2
Initial earnest money deposit @mclark	Temporary	Anyone	Fri, Sep 2
<b>Title and Tenancy submitted by buyer @office staff</b>	Temporary	Anyone	Fri, Sep 2
Lead-based Paint Disclosure @jsmith	8956 Bluebonnet Lane, Austin, TX 78...	Anyone	Fri, Sep 2
Listing Agreement @jsmith	8956 Bluebonnet Lane, Austin, TX 78...	Listing Agents	Fri, Sep 2

Gmail

Search mail

**Compose**

**Inbox**

- Starred
- Snoozed
- Sent
- Drafts 3
- Notes
- SAVED
- To Read

Rachel

**Incomplete Tasks in 4638 Green Street Allen TX 76524**

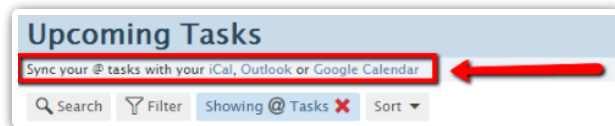
**Listing Residential Checklist:**

- Review Listing Agreement @McWhirter** Tue, Jan 15
- Seller's Property Disclosure @McWhirter** Tue, Jan 15
- Information About Brokerage Services Tue, Jan 15
- Lead-based Paint Disclosure Tue, Jan 15
- Mold Disclosure Tue, Jan 15
- Financial Addendum Tue, Jan 15
- MLS Data Sheet / Input Form @agent** Tue, Jan 15
- Keybox Authorization by Tenant Tue, Jan 15
- Send "Listing Is Activated" Email Template to Client @McWhirter** Tue, Jan 1

## On the Tasks Page

Due	Task	Visibility	C
Sat 9/2	Buyer to submit loan application @angeletti	Anyone	Ti
Mon 7/31	Lockbox Keys	Anyone	Li
Mon 10/31	Lockbox Keys	Anyone	Li
Wed 9/14	Agency Disclosure @rmcwhirter	Anyone	Li
Fri 9/9	Financial Addendum @rmcwhirter	Anyone	Li
Wed 9/7	Listing Agreement @rmcwhirter	Anyone	Li
Wed 9/7	MLS Info	Anyone	Li
Mon 9/5	Seller's Property Disclosure @rmcwhirter	Anyone	Li

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.

Due	Task	Transaction	Checklist	Visibility	Status	Agents
Fri 9/5	Change status in internal records	<input type="checkbox"/> One Main Street, Dallas, TX 75035	Closing Checklist	Anyone	Active	
Fri 10/3	5	<input type="checkbox"/> 12 Erlington Lane	Monta's Awesome Test Checklist	Listing & Selling A...	Closed	
Fri 10/3	5	<input type="checkbox"/> 12 Erlington Lane	Monta's Awesome Test Checklist	Listing & Selling A...	Closed	



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 →](#)