Tasks Page

SUMMARY

Learn how the *Tasks* page can help you track and manage overdue and upcoming tasks.

Introduction

Tasks are items on checklists that represent assignments that need to be completed during the life cycle of a transaction. The *Tasks* page tracks all overdue and upcoming tasks across all your transactions. This page also includes several filtering and sorting options making it an ideal place to identify and prioritize incomplete tasks on all transactions.
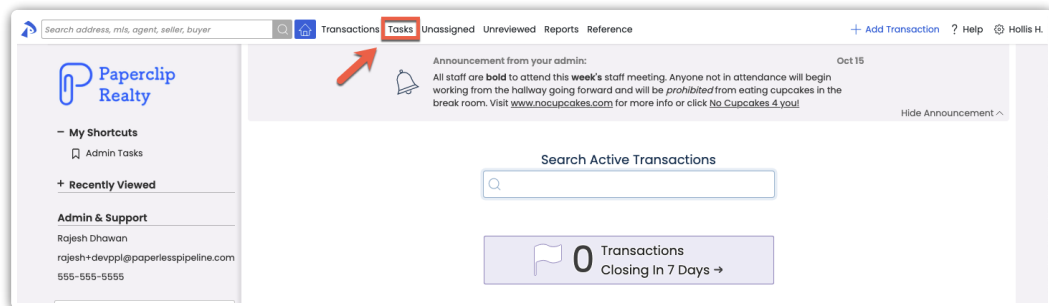
Who Can Do This?

All Pipeline users can view, search, and sync their overdue and upcoming tasks. Only admins with permission to "Fully manage checklists and templates" can check off tasks.

How To

Navigate to the Tasks Page

To navigate to the *Tasks* page:

1. **Click [Tasks] from the top menu.** You'll be shown a list of all tasks that have a due date and that you have visibility to.

⚠️ Checklist items without due dates will not appear on this list.

View Tasks on the Tasks Page

On the *Tasks* page, view tasks that have been assigned to a transaction and have a due date.

- By default, tasks are sorted by due date with the earliest due dates appearing first.
- Tasks with red due dates are overdue.
- Tasks with yellow due dates are due soon.
- Tasks with gray due dates are due in the future.

View Agents Assigned to Tasks

To see who is assigned to a particular task:

1. From the *Tasks* page, **hover over the [Agents] column.** This will show which agent(s) are assigned to a task's transaction.
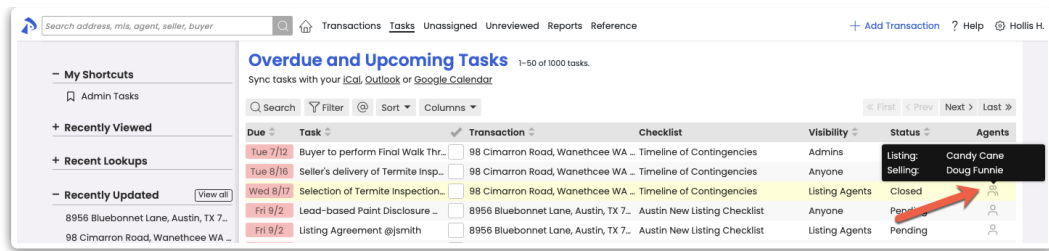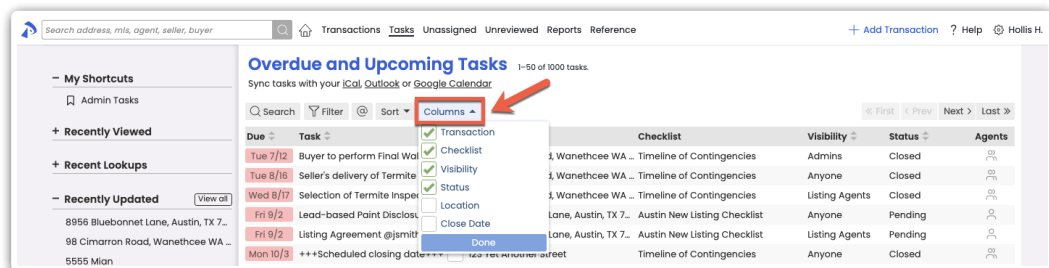
> 💡 Use the Agent Name field under the Filter tab to search for and view tasks for a specific agent task. Learn how to view tasks for a specific agent →

Show/Hide Columns

Show fields that make the most sense for you to see for your workflow and hide the fields you don't need to see.

To show or hide particular columns:

1 **Click [Columns].**

2 **Check (or uncheck) which columns you would like to be displayed on the** *Tasks* **page.**

3 **Click [Done].** The columns you checked will be displayed on the *Tasks* page. Unchecked columns will not be displayed.
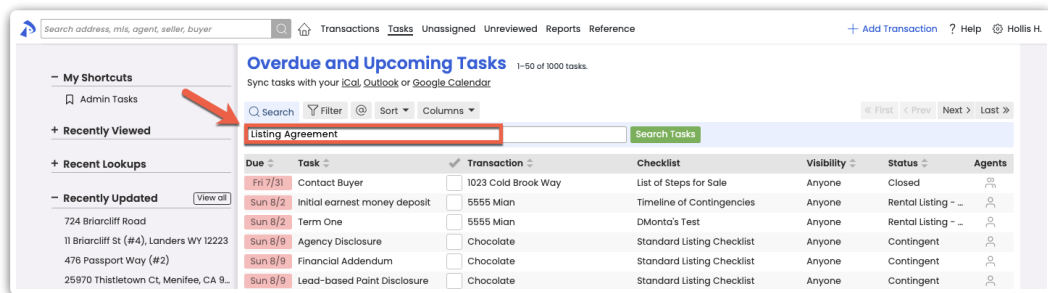
Search Tasks

To find a specific task or tasks related to a specific transaction, search for tasks by *Task Name* or *Transaction Name.*

To search tasks on the *Tasks* page:

1 **Click [Search].**
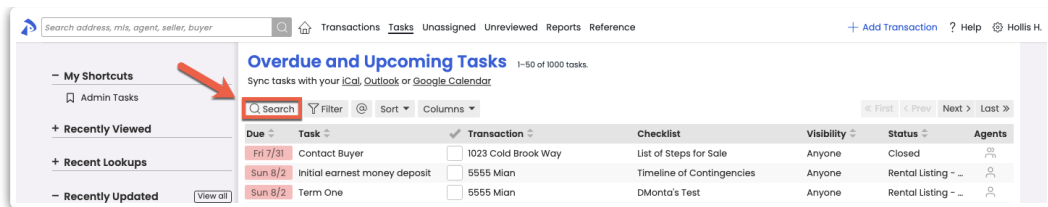
② **Enter your search term into the search field.** The system will search for your term within the *Task Name* and *Transaction Name* fields.
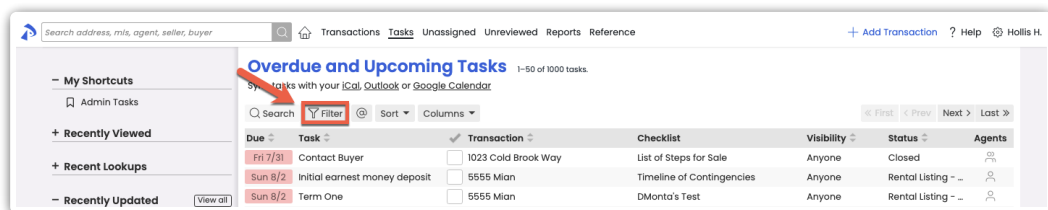

③ **Click [Search Tasks].** Tasks that match your search term will be displayed.

Filter Tasks

To manage your tasks most efficiently, filter tasks by any of the available filter options. Combine multiple filter options to drill down to the exact tasks you need to see.

To filter tasks on the *Tasks* page:

① **Click [Filter].**

② **Select your desired filter option(s).** Combine any of the available filters described in the sections below.

③ **Click [Filter Tasks].** The overdue and upcoming tasks that match your filter options will be displayed in the resulting list.
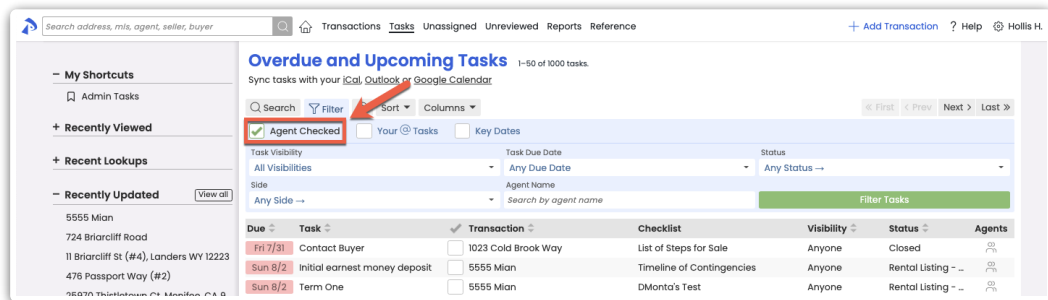
Agent Checked Tasks

Agent Checked tasks are tasks which have been checked off by an agent. They indicate to an admin that the agent has completed their responsibility for the task. These are often the tasks admins

want to review first. Learn more about Agent Fulfillment of Tasks →

To filter by agent checked tasks:

1 On the *Tasks* page, **select the [Filter] option** as described above.

2 **Select [Agent Checked].**

3 **Click [Filter Tasks].** The resulting list will display overdue and upcoming tasks that have been checked by agents.

Your @Mentioned Tasks

Your @Mentioned Tasks are tasks on which you have been @mentioned. @Mentioned tasks are often used to highlight or assign tasks to a specific person or group. Learn how to Highlight a Person's Task by @mentioning Them →

To display only your @mentioned tasks:

1 On the *Tasks* page, **select the [Filter] option** as described above.
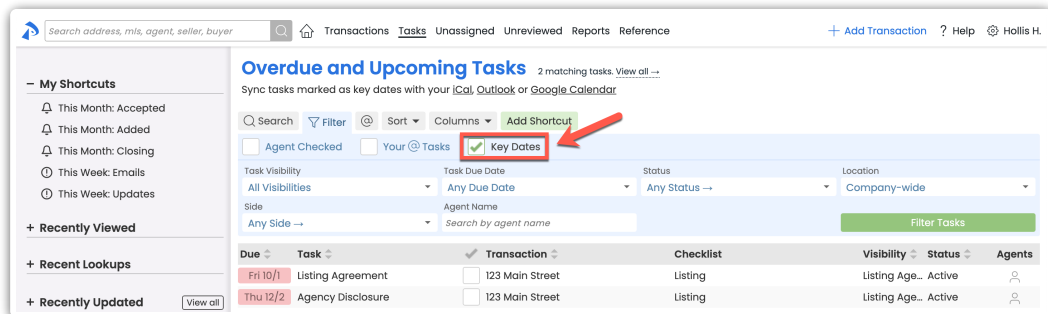
2 **Click [Your @ Tasks].**
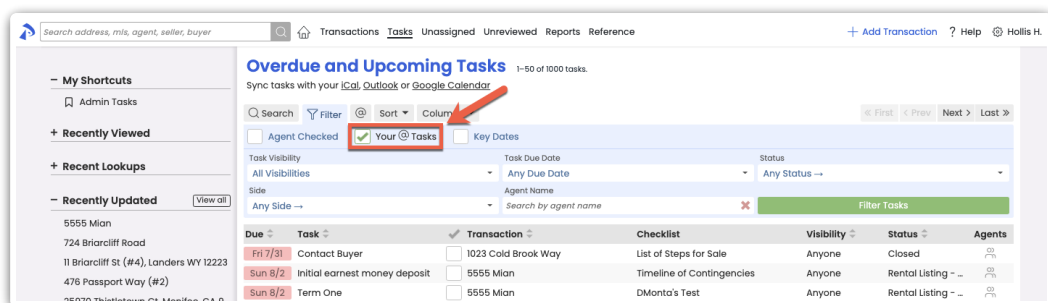
3 **Click [Filter Tasks].** The resulting list will display overdue and upcoming tasks where you have been @mentioned.

Key Dates

Key Dates are tasks designated as important timeline dates. Learn how to Manage Key Dates →

To filter by Key Dates:

1 On the *Tasks* page, **select the [Filter] option** as described above.

2 **Click [Key Dates]**.

3 **Click [Filter Tasks].** The resulting list will display overdue and upcoming *Key Date* tasks.

Task Visibility

Task Visibility is the setting that controls who can view a task. Use the task visibility filter to view only tasks with your desired visibility type. Learn how to Set Task Visibility →

To filter by task visibility:

1 On the *Tasks* page, **select the [Filter] option** as described above.

2 **From the Task Visibility drop down menu, click [All Visibilities] and select your desired Task Visibility.**
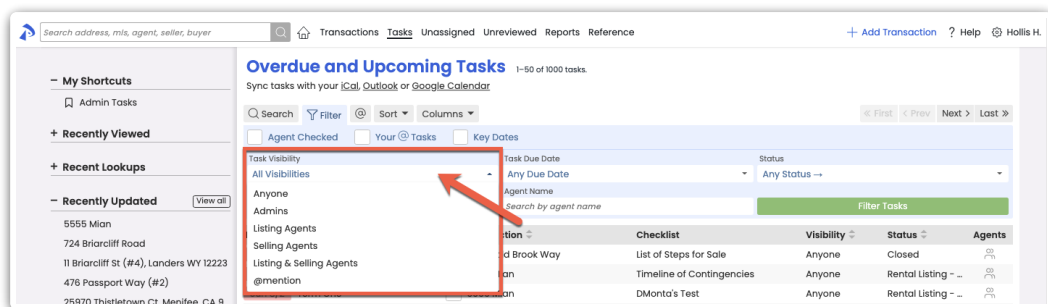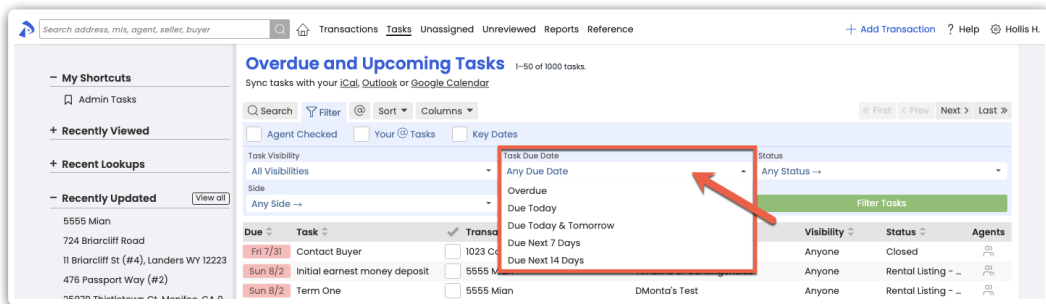

3 **Click [Filter Tasks].** The resulting list will display overdue and upcoming tasks that have your selected visibility type.

Due Date

Due Date is the date assigned to a task. Filter tasks by due date ranges to manage what needs your greatest attention.

To filter by a task's due date:

1. On the *Tasks* page, **select the [Filter] option** as described above.

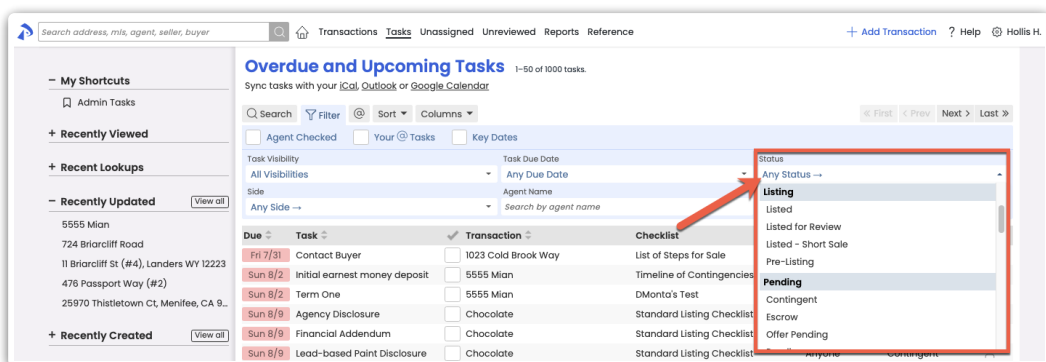2. **From the Task Due Date drop down menu, click [Any Due Date] and select your desired date range.**

3. **Click [Filter Tasks].** The resulting list will display overdue and upcoming tasks with a due date in your desired range.

Status

Filter tasks by the current *Status* of the transaction the task belongs to.

To filter tasks by *Transaction Status*:

1. On the *Tasks* page, **select the [Filter] option** as described above.

2. **From the Task Visibility drop down menu, click [Any Status →] and select your desired date range.**

3. **Click [Filter Tasks].** The resulting list will display overdue and upcoming tasks that belong to transactions in the status you selected.

Side

Filter tasks based on the side of the transaction your office represents. Learn how Pipeline Auto-detects Transaction Sides →

To filter tasks by *Transaction Side*:

1. On the *Tasks* page, **select the [Filter] option** as described above.

2. **From the Side drop down menu, click [Any Side →] and select your desired date range.**
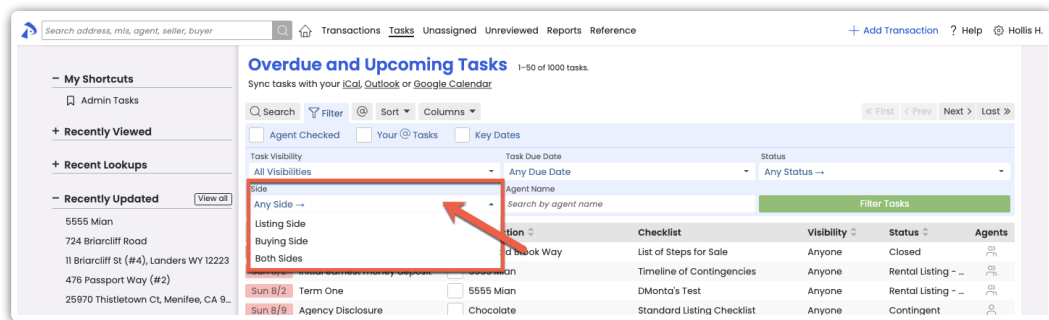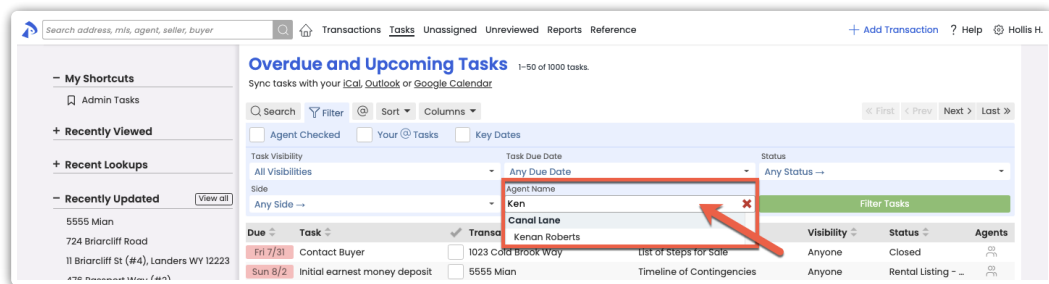

3. **Click [Filter Tasks].** The resulting list will display overdue and upcoming tasks on transactions where your office represents the selected side.

Agent Name

Filter tasks by the agent assigned to the transaction the task belongs to.

To filter tasks by *Agent Name*:

1. On the *Tasks* page, **select the [Filter] option** as described above.

2. **In the Agent Name field, start typing your desired agent's name then select it from the list.**
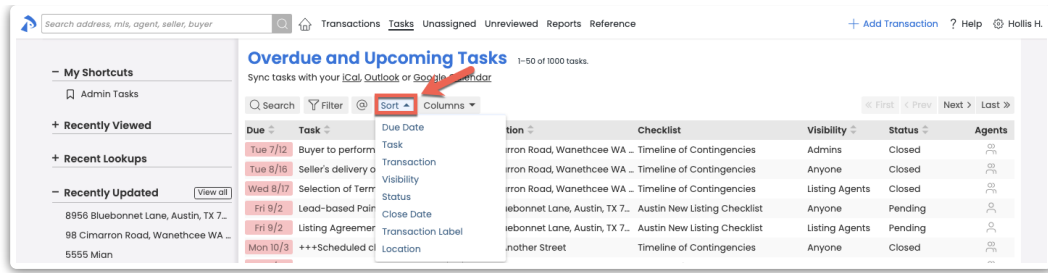

3. **Click [Filter Tasks].** The resulting list will display overdue and upcoming tasks for the selected agent.

Sort

By default, tasks are sorted by due date with the earliest due dates appearing first. Use the sort option to sort your task list by another field instead.
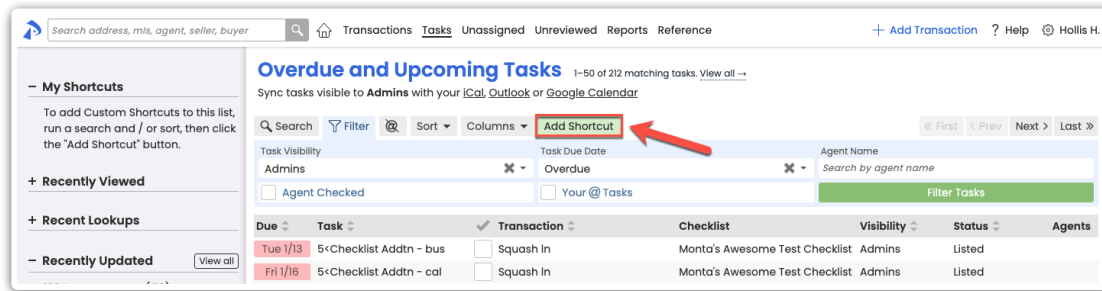
To sort tasks on the *Tasks* page:

1. **Click [Sort].**

2. **Select the field you would like to sort by.** The resulting list of docs will be sorted by the field you selected.

Save Custom Search/Sort as a Shortcut

Once you've run your desired search or filter on the *Tasks* page, save your search criteria to your *My Shortcuts* menu for quick access to it later. Learn how to Save Custom Searches & Sorts as Shortcuts →

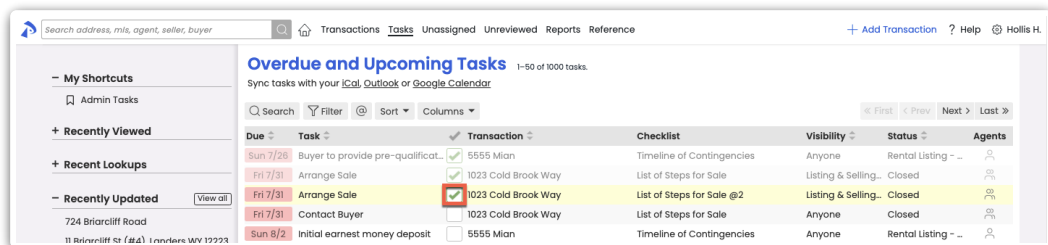## Check Off Tasks

On the *Tasks* page, admins can check off tasks to mark them as fully complete.

To mark a task as complete:
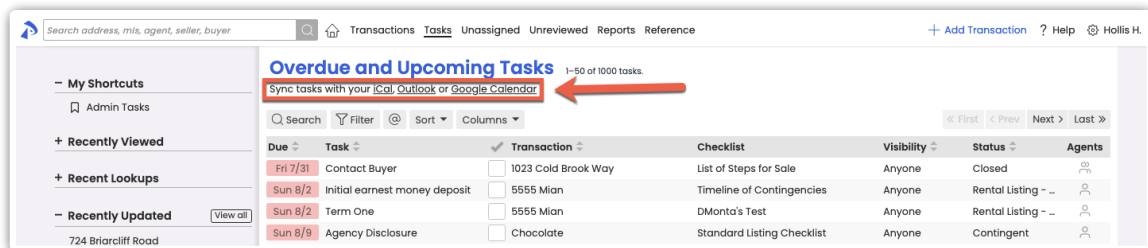
1. **Click the checkbox to the right of the task's name.**

Admins can check off tasks and agents can agent-check tasks directly on transactions. Learn how to check off tasks on transactions →

Sync Tasks To Your Calendar

Keep track of what needs to get done by syncing your Pipeline tasks to your preferred calendar. From your default or filtered task list, click the link for iCal, Outlook, or Google Calendar to sync current and future matching tasks to your calendar. Learn how to Sync and Unsync Tasks with Calendars →

Key dates may also be synced to calendars.Learn how to Sync Key Dates →

> The first time you sync your tasks, it may take several hours for new tasks to appear on your external calendar.

Pipeline Pro Webinar Recording - Using Tasks as Custom Fields 🎥

This webinar covers how to use tasks to help track custom information you'd like to store in transactions.

View more Pipeline Pro Webinars here →

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