Daily Task Reminder Emails

The Daily Task Reminder Email is an automated morning update that summarizes your overdue, current, and upcoming tasks, providing a clear, prioritized view with quick links to log into Paperless Pipeline and take action.

Introduction

The Daily Task Reminder Email provides agents and admins with an automated morning update. It summarizes overdue, current, and upcoming tasks, offering a clear, prioritized view with quick links to log into Paperless Pipeline.

The email is sent whenever agents and admins have tasks due today, tomorrow, or overdue, keeping them aware of their most pressing responsibilities.

With a comprehensive overview of urgent tasks and quick links to manage them, the Daily Task Reminder Email helps agents and admins stay on top of their workload and address tasks promptly within Paperless Pipeline.

How It Works

Admin Setup

- Admin Control: As an admin, you have the power to activate the Daily Task Reminder for both yourself and your agents.
- User Restriction: Agents cannot subscribe to these reminders on their own-only you can turn them on.
- User Customization: You can determine exactly which users receive the Daily Task Reminder Email. For example, you may choose to send these emails only to agents who need an extra nudge to get things done.

Automatic Notification

- **Sent Daily:** Every day, Paperless Pipeline identifies tasks that are overdue, due today, or due tomorrow. This information is compiled into the Daily Task Reminder Email.
- Morning Delivery: Emails are sent each morning, giving users a clear view of their tasks to help them plan their day effectively.

What's In the Email

- **Task Summary:** The email provides a summary of tasks, categorizing them into overdue, due today, and due tomorrow, highlighting what needs immediate attention.
- Quick Links: The email includes direct links to Paperless Pipeline, allowing users to log in and address their

Example

Tasks Due

My Company Admin <	·				7	27
•						
	Tasks due by Mon. Jul 15					
	lasks due by Moll, Jul 15					
	Today's Tasks					
	Task Signed Listing Agreement	Transaction	Visible To	Due On		
	Signed Seller's Disclosure	309 June Street	Listing Agents	Sun, Jul 14		
	Tomorrow's Tasks					
	Task Follow Lip with Client	Transaction	Visible To	Due On		
	rollow op with client	120 Mail DUAC	Duying Agenta	mon, our to		
	Recently Overdue Tasks					
	Task	Transaction	Visible To	Due On		
	Enter Client	456 Turkey Way	Anyone	Fri, Jul 12		
	Listing Agreement	123 Main Drive	Buving Agents	Wed Jul 10		
	Email Doc Package to Client	309 June Street	Listing & Buying Agents	Wed, Jul 10		
	Email Introductory	309 June Street	Anyone	Wed, Jul 10		
	 View all 3060 overdue tasks — 					
	 View all open tasks → 	-				
	Color Key					
	Orange Highlight	ent-checked task, waiting <u>'e →</u>	for admin approval.			
	Red Highlight Denotes an age	ent marked the task not a	ipplicable.			
	Cases Unklinkt Denotes an "@	<u>e →</u> mentioned" task, which r	nentions a specific person or	role in a task name.		
	Learn more her	<u>'e →</u>				
			erless			
		🛛 💙 Pipe	line			
	© 2	022 Paperless Pipeline.	All rights reserved.			

Tasks Overdue

Tasks overdue as of Wed, Jul 17	_					
to *					ਸ	5
	Tasks overdue as of Wed, Jul Recently Overdue Tasks Task Scheduled Closing Date Interior/Exterior Cleaning Selfer removal of Items from Property Final Walk Through by Buyer Seller's Disclosure Review Period Endst • View all 15 overdue tasks • View all open tasks • View all open tasks Cotor Key Orange Highnignt	I 17 Tansaction 16 Park Street Atlanta. GA 30301 (18 Park Street Atlanta. GA 30301 (Visible To Due On Anyone Wed, Nov 6 Anyone Wed, Oct 30 Anyone Wed, Oct 30 Anyone Fri, Oct 25			
	Red Highlight Denotes an agent in Learn more here → Green Highlight Denotes an "@men Learn more here →	tioned" task, which mentions a specific p	erson or role in a task name.			
		Paperless Pipeline				
	© 2022	Paperless Pipeline. All rights reserved.				
		Log in to your account →				

Send Daily Task Reminder Emails to an Agent

Send Daily Task Reminder Emails to an agent automatically whenever they have tasks due today, tomorrow, or overdue.

Who Can Do This: Admins with Create users and locations permission.

To set up automatic Daily Task Reminder Emails for an agent:

Go to Manage Users :

- Click your name in the upper right corner, then [Admin / Settings].
- Select [Manage Users] from the People section of the left menu.

2 Select User:

• Click the name of the person you want to receive Daily Task Reminder Emails.



• Check the box next to [Send daily email with upcoming tasks to this user] to activate the agent's Daily Task Reminder Emails.

← Go back to Manage Users	Edit User Lane Clover Unassigned docs maildrop address for Lane: 1232666-9991326-x@docs.p	aperlesspipeline.com
- People	User Information	Update User
Manage Locations	First Name *	
Manage Users	Lane	
Manage Contacts	Last Name*	
Manage Contact Roles	Clover	
– Customize	Email Address*	
Company Settings	lane.clover@paperlesspipeline.com	
Transaction Statuses	Phone	
Transaction Labols	(555) 555-5555	
Document Labels	Primary Location*	
Document Namer	Main Branch *	
Lead Sources	Role*	
Custom Fields	Agent	
	Make this user the primary contact for this location	
– Templates	Send doily amail with upcoming tasks to this user	0
Business Holidays		check this box, it this user should receive a daily email with their overdue tasks as well (
Checklists	Include this user in the staff recipients section of Notes	tasks due soon on their transactions.
Break Apart		Recommended.

4 Save Settings:

• Click [Update User].

Starting tomorrow, the agent will receive Daily Task Reminder Emails whenever they have tasks due today, due tomorrow, or overdue.

Send Daily Task Reminder Emails to Yourself

Send Daily Task Reminder Emails to yourself automatically whenever you have tasks due today, tomorrow, or overdue.

Who Can Do This: Admins.

To set up automatic Daily Task Reminder Emails for yourself:

1 Go to Your Personal Profile :

• Click your name in the upper right corner, then [Personal Profile].



• Check the box next to "Send daily email with upcoming tasks to this user" to activate your Daily Task Reminder Emails.

Search address, mls, agent, seller, buye	r Q 🟠 Transactions Tasks Unassigned Unreview	ed Reports Reference
Personal Profile	Personal Profile	
Your Commissions	Your Login Information	
Message Templates	Your Email Address	
Manage Templates	hollis+video@paperlesspipeline.com	
Scheduled Messages	Current Password	
Integrations	New Password	
Zapier		
Dropbox Sign	Retype New Password	
DocuSign		
Your Info	Your Email Settings	
Robert Zimmerman	Peceive email acknowledgement whenever you send in	
hollis+video@paperlesspipeline.com	docs to your maildrop	
Admin	Receive monthly production summary by email	
Your Permissions	Receive notification when agent adds doc to a	
Master Admin (account-wide,		0
unlimited access ()	Receive daily email with upcoming tasks	Receive a daily email with all tasks due today
Legal Stuff	Receive daily activity email	and tomorrow on your durisdedoris.
Terms of Service	Include me in the staff recipients section of Notes	
Privacy Policy	Enable alternate signatures on my messages	

3 Save Settings:

• Click [Update User] to save your settings.

Starting tomorrow, you will receive Daily Task Reminder Emails whenever you have tasks due today, due tomorrow, or overdue.

View Your Daily Task Reminder Email

View a Daily Task Reminder email you received when you had tasks due soon or overdue.

Who Can Do This: Anyone who receives the Daily Task Reminder Email.

To view your received Daily Task Reminder Email:

l Open Email:

• Open the email you received when you had tasks due today, tomorrow, or overdue.

View Tasks Lists:

- See the following tasks lists when you have tasks due on the specified days:
 - Today's Tasks displays tasks due today.
 - Tomorrow's Tasks displays tasks due tomorrow.

• Recently Overdue Tasks displays tasks that are past their due dates.

Today's Tasks			
Task	Transaction	Visible To	Due On
Signed Listing Agreement	309 June Street	Listing Agents	Sun, Jul 14
Signed Seller's Disclosure	309 June Street	Listing Agents	Sun, Jul 14
Terrer and Terrer			
Iomorrow's lasks			
Task	Transaction	Visible To	Due On
Task Follow Up with Client	Transaction 123 Main Drive	Visible To Buying Agents	Due On Mon, Jul 15
Task Follow Up with Client Recently Overdue Tasks	Transaction 123 Main Drive	Visible To Buying Agents	Due On Mon, Jul 15
Task Follow Up with Client Recently Overdue Tasks Task	Transaction 123 Main Drive Transaction	Visible To Buying Agents Visible To	Due On Mon, Jul 15
Task Follow Up with Client Recently Overdue Tasks Task Enter Client	Transaction 123 Main Drive Transaction 456 Turkey Way	Visible To Buying Agents Visible To Anyone	Due On Mon, Jul 15 Due On Fri, Jul 12
Task Follow Up with Client Recently Overdue Tasks Task Enter Client Enter Listing Info	Transaction 123 Main Drive Transaction 456 Turkey Way 456 Turkey Way	Visible To Buying Agents Visible To Anyone Anyone	Due On Mon, Jul 15 Due On Fri, Jul 12 Thu, Jul 11
Task Follow Up with Client Recently Overdue Tasks Task Enter Client Enter Listing Info Listing Agreement	Transaction 123 Main Drive Transaction 456 Turkey Way 456 Turkey Way 123 Main Drive	Visible To Buying Agents Visible To Anyone Anyone Buying Agents	Due On Mon, Jul 15 Due On Fri, Jul 12 Thu, Jul 11 Wed, Jul 10
Task Follow Up with Client Recently Overdue Tasks Task Enter Client Enter Listing Info Listing Agreement Email Doc Package to Client	Transaction 123 Main Drive Transaction 456 Turkey Way 456 Turkey Way 123 Main Drive 309 June Street	Visible To Buying Agents Visible To Anyone Anyone Buying Agents Listing & Buying Agents	Due On Mon, Jul 15 Due On Fri, Jul 12 Thu, Jul 11 Wed, Jul 10 Wed, Jul 10

3 Use Links:

- Use the links to quickly access Paperless Pipeline, and go to:
 - A Transaction: Click [the link] in the Transaction column.
 - **Overdue Tasks**: Click [View all overdue tasks →].
 - All Due Tasks: Click [View all open tasks →].

4 Take Action:

• As needed once you've done your part, take action (described below).

Agents

Learn more about Agent Task Fulfillment →

Admins

Learn more about Admin Task Completion \rightarrow