

# 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

tasks quickly.

## Example

### Tasks Due

Tasks due by Mon, Jul 15

My Company Admin <[email]>  
to [email]

Tasks due by Mon, Jul 15

**Today's Tasks**

Task	Transaction	Visible To	Due On
Signed Listing Agreement	<a href="#">309 June Street</a>	Listing Agents	Sun, Jul 14
Signed Seller's Disclosure	<a href="#">309 June Street</a>	Listing Agents	Sun, Jul 14

**Tomorrow's Tasks**

Task	Transaction	Visible To	Due On
Follow Up with Client	<a href="#">123 Main Drive</a>	Buying Agents	Mon, Jul 15

**Recently Overdue Tasks**

Task	Transaction	Visible To	Due On
Enter Client	<a href="#">456 Turkey Way</a>	Anyone	Fri, Jul 12
Enter Listing Info	<a href="#">456 Turkey Way</a>	Anyone	Thu, Jul 11
Listing Agreement	<a href="#">123 Main Drive</a>	Buying Agents	Wed, Jul 10
Email Doc Package to Client	<a href="#">309 June Street</a>	Listing & Buying Agents	Wed, Jul 10
Email Introductory	<a href="#">309 June Street</a>	Anyone	Wed, Jul 10

- [View all 3060 overdue tasks →](#)
- [View all open tasks →](#)

**Color Key**

**Orange Highlight** Denotes an agent-checked task, waiting for admin approval.  
[Learn more here →](#)

**Red Highlight** Denotes an agent marked the task not applicable.  
[Learn more here →](#)

**Green Highlight** Denotes an "@mentioned" task, which mentions a specific person or role in a task name.  
[Learn more here →](#)

  
© 2022 Paperless Pipeline. All rights reserved.  
[Log in to your account →](#)

### Tasks Overdue

Tasks overdue as of Wed, Jul 17

My Company Admin <[email]>

Tasks overdue as of Wed, Jul 17

Recently Overdue Tasks

Task	Transaction	Visible To	Due On
Scheduled Closing Date	<a href="#">18 Park Street, Atlanta, GA 30301 (...)</a>	Anyone	Wed, Nov 6
Interior/Exterior Cleaning	<a href="#">18 Park Street, Atlanta, GA 30301 (...)</a>	Anyone	Wed, Oct 30
Seller removal of Items from Property	<a href="#">18 Park Street, Atlanta, GA 30301 (...)</a>	Anyone	Wed, Oct 30
Final Walk Through by Buyer	<a href="#">18 Park Street, Atlanta, GA 30301 (...)</a>	Anyone	Wed, Oct 30
Seller's Disclosure Review Period Ends	<a href="#">18 Park Street, Atlanta, GA 30301 (...)</a>	Anyone	Fri, Oct 25

- [View all 15 overdue tasks →](#)
- [View all open tasks →](#)

---

**Color Key**

**Orange Highlight** Denotes an agent-checked task, waiting for admin approval.  
[Learn more here →](#)

**Red Highlight** Denotes an agent marked the task not applicable.  
[Learn more here →](#)

**Green Highlight** Denotes an "@mentioned" task, which mentions a specific person or role in a task name.  
[Learn more here →](#)



© 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.
- Select User:**
  - Click the name of the person you want to receive Daily Task Reminder Emails.

### 3 Turn It On:

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

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

Go back to Manage Users

**People**

- Manage Locations
- Manage Users
- Manage Contacts
- Manage Contact Roles

**Customize**

- Company Settings
- Transaction Statuses
- Transaction Labels
- Document Labels
- Document Names
- Lead Sources
- Custom Fields

**Templates**

- Business Holidays
- Checklists
- Break Apart

**Financials**

### Edit User Lane Clover

Unassigned docs maildrop address for Lane: 1232696-999326-\*@docs.paperlesspipeline.com

**User Information** Update User

First Name \*  
Lane

Last Name \*  
Clover

Email Address \*  
lane.clover@paperlesspipeline.com

Phone  
(555) 555-5555

Primary Location \*  
Main Branch

Role \*  
Agent

Make this user the primary contact for this location

Send daily email with upcoming tasks to this user

Include this user in the staff recipients section of Notes

**+ License # and Other Info**

Commission Percent, Cap, & Notes, Payable Corp, Start

Check this box, if this user should receive a daily email with their overdue tasks as well as tasks due soon on their transactions. 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].

### 2 Turn It On:

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

### 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:

### 1 Open Email:

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

### 2 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.

**Tasks due by Mon, Jul 15**

Today's Tasks			
Task	Transaction	Visible To	Due On
Signed Listing Agreement	<a href="#">309 June Street</a>	Listing Agents	Sun, Jul 14
Signed Seller's Disclosure	<a href="#">309 June Street</a>	Listing Agents	Sun, Jul 14

  

Tomorrow's Tasks			
Task	Transaction	Visible To	Due On
Follow Up with Client	<a href="#">123 Main Drive</a>	Buying Agents	Mon, Jul 15

  

Recently Overdue Tasks			
Task	Transaction	Visible To	Due On
Enter Client	<a href="#">456 Turkey Way</a>	Anyone	Fri, Jul 12
Enter Listing Info	<a href="#">456 Turkey Way</a>	Anyone	Thu, Jul 11
Listing Agreement	<a href="#">123 Main Drive</a>	Buying Agents	Wed, Jul 10
Email Doc Package to Client	<a href="#">309 June Street</a>	Listing & Buying Agents	Wed, Jul 10
Email Introductory	<a href="#">309 June Street</a>	Anyone	Wed, Jul 10

- [View all 3060 overdue tasks →](#)
- [View all open tasks →](#)

### 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 →](#)