Redirect Pipeline's Automatic Emails After a Staff Change

Last Modified on 09/04/2026 11:04 am EDT

Your closing coordinator left three weeks ago and her name is still on every reminder your agents get. There's no per-email setting to hunt for — Pipeline resolves the sender the same way every time, and two fields decide it.

Introduction

This is one of the most-asked questions we get, and almost everybody arrives at it the same way: looking for the setting that controls *this particular email*. There isn't one, and that's the good news. It means you don't have to find twelve settings.

Closing and expiration reminders, daily task emails, daily activity summaries, doc comment notifications: everything Pipeline sends on its own resolves its sender down one chain. It looks for the primary contact on the transaction's Location. If that's not set, it uses your account's Admin & Support Contact. If neither is set, it falls back to a master admin.

So redirecting your automatic mail is a matter of setting those two things correctly, in that order. The same two fields are how offices point their mail at a department instead of a person.

When to Use This

- An admin has left and agents are still replying to an inbox nobody reads.
- Automatic emails are going out under one branch manager's name across offices that aren't theirs.
- You want replies going to a shared inbox — a conveyance or closing department — rather than to an individual.
- You went looking for a setting to change the sender on just the closing reminders and couldn't find one.
- Bounce notices for system emails are landing with the wrong person, or with someone who's gone.

Why This Beats Renaming the Old Admin's Profile

The fast fix is obvious: open the departed admin's profile, put the new person's name and email on it, and every email that used to come from her comes from him instead. It works, and it's the wrong move — that profile is signed to everything she ever did. Every document she reviewed and every transaction she touched now reads as though he did it, and the record of who actually handled a file is quietly gone.

Setting the contact fields costs the same five minutes and doesn't rewrite your history. One profile per person, and the sender is a setting — not an identity you hand over.

1. Set the Admin & Support Contact

Start with the account-wide one, because it's the safety net under everything else. It's three fields — a support name, email, and phone — in Company Settings, and once saved it becomes the default sender on system emails and the help contact shown on every user's Home page.

This is the field to point at a department. If replies should go to a conveyance team, a closing desk, or a shared inbox rather than a person, put that name and address here and every automatic email starts arriving from it.

Point your team to the right person for help — the contact shown on every Home page and used on system emails.

See Admin & Support Contact

> Leave the name or email blank and Pipeline falls back to the master admin's, which is often how a departed person ended up on everything in the first place. Filling both in explicitly is what takes them off it.

2. Fix the Location Primary Contacts

This is the step that catches people, because the account-wide setting looks like it should have solved everything and hasn't. A Location's primary contact sits *above* the Admin & Support Contact in the chain — so any Location still naming your departed admin keeps sending as her, no matter what you saved in step 1.

Go through your Locations and check each one's primary contact. Point it at whoever runs that office now, or clear it so the Location falls through to the account-wide contact you just set.

Give each Location a primary contact so agents know who to reply to, and system emails come from the right person.

See Primary Location Contact

> Changing who a Location's primary contact is doesn't change what anybody can do. It's a label about correspondence, not a permission — the person you remove keeps every bit of access they had, and the person you name gains nothing.

3. Deactivate the Departed User

With the sender pointed somewhere useful, turn off the profile itself. Deactivating ends their access without touching a single transaction, document, or commission tied to their name — the work stays, the login stops.

It also stops two things that keep the old admin in your life: the automatic mail addressed *to* them, and the bounce notices their dead mailbox generates every time Pipeline tries.

Turn off a user's access when they leave — without losing any of the work tied to their name.

See User Deactivation

> Bounce notifications for system emails go to the Admin & Support Contact only, and there's no way to name a second recipient. If more than one person needs to see them, set a forwarding rule on that inbox — and make sure the address in step 1 is one somebody actually reads.

4. Check Who's on the Receiving End

Sender is half the job. The other half is who these emails go *to*, and that's controlled separately — which is worth ten minutes after a staff change, because the list usually still reflects who worked here last year.

Daily task reminders are set per person, on their own profile.

Start each day knowing exactly what's due — Pipeline emails you a rundown of the tasks that are overdue, due today, and due tomorrow.

See Daily Task Reminder Emails

Closing and expiration reminders are an account-wide switch.

Five days before a transaction is set to close or a listing is set to expire, Pipeline emails the agent a heads-up — automatically, across the whole account.

See Closing & Expiration Reminders

5. Know What This Doesn't Cover

Two limits worth saying plainly, because both come up right after somebody makes these changes and expects more than they got.

You can't set a different sender for one *type* of email. There's no way to have closing reminders come from one person and daily summaries from another — the chain is the chain, and it applies to everything Pipeline sends on its own.

And messages a person sends *by hand* from a transaction aren't system emails at all. Those always carry the logged-in user's name, and replies go back to them. No setting changes that.

Emails you send out of Pipeline arrive from help@paperlesspipeline.com with your name on them, and replies come back to you.

See Send-From Identity

> If what bothers you is a personal name appearing where a business name should, the name on a sent email comes from that profile's name field — so an admin profile named for the desk rather than the person shows the desk.