Control Which Automatic Emails Your Team Gets

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Some of Pipeline's automatic emails are one switch for the whole company and some live on each person's own profile. Knowing which is which is the whole answer.

Introduction

The question almost always arrives the same way: *one agent wants these emails to stop. How do I turn them off just for her?* And the answer depends entirely on which email she means, because Pipeline's automatic emails are governed at two different levels and nothing on the outside of them tells you which.

Some are a single company-wide switch a master admin flips in your account's email settings. They're on for everybody or off for everybody, with no per-person version and no unsubscribe link. The rest are personal: they sit on each user's own profile, and each person turns their own on and off.

The consequence customers keep running into is at the intersection: the closing and expiration reminder is company-wide, so you *cannot* silence it for one agent. If it's wrong for one person, your choices are living with it or turning it off for the office — and if you turn it off, this article's last two steps are how you rebuild the warning on your own terms.

When to Use This

- One agent asked to stop getting reminder emails and you only want to change theirs.
- You're still setting Pipeline up and want the automatic emails quiet until launch day.
- Agents who don't log in are getting closing reminders and asking what they are.
- Your closing reminder arrives five days out and your office needs two weeks' notice.
- You want reminders for one office in a multi-location account and not for the others.

1. Sort the Email by Where Its Switch Lives

Before changing anything, find the email on one of these two lists. Everything else follows from which one it's on.

Company-wide. A master admin sets these once for the whole account, in your email settings. There's no per-user version.

- **Closing and expiration reminders** — the five-day heads-up to agents on a transaction.
- **Doc comment notifications** — the email an agent gets when an admin comments on one of their documents.
- **Monthly production summary** — each agent's own numbers, once a month.

Personal. These live on each person's own profile, and each person turns their own on or off.

- **Daily task reminder** — overdue, due today, due tomorrow. The one exception below.
- **Daily activity email** — yesterday's created transactions and status changes, for admins.

- **Doc upload notification** — an email when an agent adds a doc to a transaction.

2. Turn the Company-Wide Reminders On or Off

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

> Doc comment notifications sit on the same settings page and behave the same way — company-wide, master admin, all or nothing. See Doc Comment Notifications. So does the monthly production summary: see Monthly Production Summary.

3. Let Each Person Handle Their Own

The personal emails work the opposite way, and it catches admins out: you can't turn one on for a colleague who's asked for it, and you can't turn one off for someone who's complaining about it. They set it themselves on their own profile. Pipeline subscribes new admins to the daily activity email by default, which is usually why one arrives before anyone asked for it.

Every morning, a single email tells you what happened in your account the day before — the transactions added, the ones that changed status, and how many docs are still sitting unassigned.

See Daily Activity Emails

4. Use the One Per-User Control You Have

There's exactly one automatic email you can switch off for a single person: the daily task reminder. Its per-user checkbox lives in that user's profile under Manage Users, which is also why it's the answer during a rollout — turn it off for the agents, get your checklists right, turn it back on when you're ready for them to see it.

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

> If the complaint is volume rather than the email itself, don't switch it off — narrow what it carries. SeeStop the Daily Task Email From Drowning You.

5. Rebuild the Warning on Your Own Schedule

Five days is fixed, and it isn't a dial you'll find in your own settings — nor can you aim it at one location while sparing the rest. If neither the timing nor the audience suits your office, the standing answer is to turn the built-in reminder off and rebuild it out of a checklist task: a relative due date counting back from the Close Date or Expiration Date puts the warning wherever you want it on the calendar, on the checklist templates you choose, visible to whoever should act on it.

A due date is what puts a task on your Tasks page, into your reminder emails, and onto your calendar — and taking it back off is how you quiet a task you no longer need.

See Task Due Dates

> Get a 30-Day Warning Before a Listing Expires works the listing side end to end.

6. Send Your Own Version Instead of Ours

Pipeline writes the built-in reminder, and you can't edit its wording — so if what you actually want is your own message — your voice, your instructions, your attachments — write it as a template and schedule it against the Close Date or the Expiration Date. That gives you the timing, the wording, and the recipients all at once, including people the built-in reminder can't reach because they aren't agents on the file.

Set a message to send itself later — on a date the transaction supplies, when a task gets checked off, or at a time you pick.

See Message Scheduling