Daily Activity Emails

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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.

Introduction

You can't watch the account all day, and most of what happens in it doesn't need watching in the moment. What you want is to know by morning: what came in, what moved, and what's piling up.

The daily activity email is that morning read. Pipeline builds it overnight and sends it the next day, covering what happened the day before in one message rather than a stream of alerts. It's an admin's view of the account rather than an agent's, and it's a personal setting, which is why each admin switches their own on and why one admin can't turn another's on or off for them.

By the time you sit down, what changed since yesterday is already in your inbox rather than waiting behind a sign-in. It's a digest rather than a live feed, so it doesn't ping you the moment an agent creates a transaction. If that's the timing you need, it isn't there, and a saved view you check on your own schedule gets closer to it.

How It Works

One email a day, sent each morning to every admin who has opted in, covering the previous day's activity across the account.

What's in the Email

The transactions created the previous day, the transactions that changed status and the status each one moved to, and the number of docs still sitting unassigned.

What Counts as Activity

Only two things put a transaction in the email: someone created it, or its status changed. Editing a field on a transaction that already exists — a Close Date, for instance — doesn't. That transaction appears once it actually moves to a different status.

It's a Personal Setting

Each admin turns it on or off on their own profile. Nobody can turn it on — or off — on another user's behalf, and there's no list showing who is subscribed. Pipeline subscribes newly added admins by default.

Who It Comes From

Pipeline's automatic emails show the account's Admin & Support Contact as the sender. If a Location has a Primary Location Contact set, that person is the sender for users in that Location instead, and replies go to them.

Turn Your Daily Activity Email On or Off

> Switch the daily summary of yesterday's activity on or off for your own profile.

> **Who Can Do This**: Admin-level users, on their own profile. You can't change this setting for another user.

To turn your daily activity email on or off:

1. Click the [Gear] in the upper-right corner, then [My Info].
2. On your *Personal Profile* page, scroll to *Your Email Settings.*
3. Check **Receive daily activity email** to turn it on, or uncheck it to turn it off.
4. Click [Save Settings].

The next morning's email reflects your change.

Watch Something the Digest Doesn't Cover

Two things put a transaction in this email: someone created it, or its status changed. A close date that moved, a file still missing an agent, a deal that has sat in the same status for three weeks — none of that shows up, and none of it is worth checking by hand every day either.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

Daily Activity Emails FAQ

The Daily Activity Email is an admin-only, self-subscribed summary of yesterday's created transactions, status changes, and unassigned docs. Answers to the common questions about who can receive it, what counts as activity, and why one won't arrive. See Daily Activity Emails FAQ.

Daily Activity Emails Troubleshooting

Running into a problem? Start here.

- Why Aren't Pipeline's System Emails Reaching an Agent?