

Daily Task Reminder Emails FAQ

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The daily reminder gathers a person's overdue, due-today, and due-tomorrow tasks into one morning email — with admins controlling who receives it. Answers to the common questions about what's inside, who can change it, and why reminders sometimes keep coming.

What's included in the daily task reminder email?

Your tasks that are overdue, due today, and due tomorrow. The email groups them so the most urgent work is right at the top, and it only lists tasks that fall in that window.

Can an agent turn their own daily reminder on or off?

No — only an admin can. Agents can't change this on their own profile. An admin turns it on or off for them from [Manage Users] by checking or unchecking "Send daily email with upcoming tasks to this user."

How do I turn the daily reminder on or off for myself?

From your own profile, if you're an admin. Click the [Gear], then [My Info], toggle "Receive daily email with upcoming tasks," and click [Save].

Can I schedule the reminder to go out a few days before a task's due date?

Not today. The daily email covers tasks that are overdue, due today, or due tomorrow — the reminder window isn't adjustable to a set number of days ahead. If that would help how you work, tell us at help@paperlesspipeline.com; your feedback shapes what we build next.

Can I get the reminder weekly instead of daily?

It's a daily email — there isn't a weekly or biweekly option today. If a less frequent cadence would fit your team better, let us know at help@paperlesspipeline.com.

Why is someone still getting reminders for a transaction that fell through?

Because the tasks on it are still open and due. The daily email keeps listing tasks until they're checked off or marked Not Applicable. Completing or clearing those tasks stops the reminders for that transaction.

Why is an agent getting reminders for a task that isn't theirs to do?

Because the task is visible to them and meets the reminder window. If a task is meant only for admins, setting that task's visibility to admins keeps it off agents' reminder emails. Not sure how a specific task is set up? Email help@paperlesspipeline.com and we'll take a look.

Learn More

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](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
