Daily Task Reminder Emails

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

Introduction

The first question of the day is what's late. The second is what's due before you get to tomorrow. Both answers are already in Pipeline, on a page you'd have to remember to open, at the hour you're least likely to open it.

The daily task reminder brings them to you instead. Once a day, one email gathers your tasks into what's overdue, what's due today, and what's due tomorrow, so the morning starts with the list rather than the hunt for it. It's built from the tasks you can see, which for anyone with a wide view of the office makes for a long email. The reminder follows your access rather than your name, so everything in reach is in it.

Nothing has to be held in your head overnight. The deadline turns up in your inbox while there's still time to move on it. If the email runs longer than it's useful, that's a question of scope rather than a fault, and a filtered view of the *Tasks* page you check yourself is the tighter tool.

How It Works

One email, once a day, built from the tasks that are coming due or already past due for the person receiving it.

What's in the Email

Each reminder groups your tasks three ways — **overdue**, **due today**, and **due tomorrow** — so the most urgent work sits right at the top.

Which Tasks Show Up

Only tasks that meet the reminder window appear: due today, due tomorrow, or overdue. Tasks further out, or ones a person can't see, aren't included — so the email stays focused on what needs attention now.

Who Controls the Setting

An admin can turn the reminder on or off for their own profile, and on or off for any user from Manage Users. Agents can't edit this on their own profile, so an admin manages it for them.

Turn Your Daily Reminder On or Off

Switch the daily reminder on or off for your own profile.

Who Can Do This: Admins, on their own profile. Agents can't change this setting themselves — an admin sets it for them.

To turn your daily reminder on or off:

1. Click the [Gear] in the upper-right corner, then [My Info].
2. On your *Personal Profile* page, click **Receive daily email with upcoming tasks** to toggle it on or off.
3. Click [Save].

Your own daily reminder is now on or off, based on what you set.

Turn the Daily Reminder On or Off for a User

Switch the daily reminder on or off for any agent or staff member from Manage Users.

Who Can Do This: Admins with access to Manage Users.

To turn the daily reminder on or off for a user:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users] from the left menu.
3. Click the user's name to open their settings.
4. Check **Send daily email with upcoming tasks to this user** to turn the reminder on, or uncheck it to turn the reminder off.
5. Click [Update User].

That user will start — or stop — receiving the daily task reminder with their next day's email.

Cut the List Down to Your Own Work

The reminder follows your access rather than your name, so an admin who can see the whole office gets the whole office every morning. Nothing in the email narrows it. What does is a Tasks page you filter yourself and check on your own schedule.

Narrow the Tasks page to an exact set — search by task or transaction name, then filter by @mention, agent, due date, status, and more.

See Tasks Search

Frequently Asked Questions

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.