Stop the Daily Task Email From Drowning You

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There's no filter inside the reminder email, because there's nothing in it to filter — it's a rendering of your task list. Every fix starts one level up, on the tasks themselves.

Introduction

You open the morning reminder and there are sixty tasks on it. Four are yours. The rest belong to agents you barely touch, deals you're not working, and a coordinator who has her own system. After a week of that you stop opening it, which is exactly the outcome the email exists to prevent.

The reason there's no setting to fix it is that the reminder isn't a report with options. It's a mirror. Pipeline takes the tasks you're allowed to see, keeps the ones that are overdue, due today, or due tomorrow, and mails you that list. Nothing else decides what goes in it. So the email is a symptom, and the thing to treat is *what you can see.*

That gives you four levers, and they're worth trying in order: narrow what a task is visible to, opt a person out entirely, work from a filtered view instead of the email, or, when someone's role genuinely can't be narrowed, give them a second, smaller profile.

When to Use This

- Your morning reminder runs to dozens of tasks and three of them are yours.
- You want your coordinator's tasks out of the broker's email without taking them off the deal.
- You're still rolling Pipeline out and don't want agents getting reminders yet.
- You're the master admin and there seems to be no way to see only your own deals.
- An agent asked to be unsubscribed and can't find the setting anywhere on their own profile.

Why This Starts With Who Can See the Task

Nearly everyone goes looking for the setting on the email first — a preferences page, an unsubscribe footer, a "only send me my own" checkbox. There isn't one, and no amount of hunting will produce it, because the email has no independent contents to configure. Whatever is on your Tasks page and coming due is what arrives in your inbox. Full stop.

Which is better news than it sounds. It means the same change fixes both surfaces at once: set a compliance task to admins only and it leaves the agents' Tasks pages *and* their reminder emails in one move, permanently, for every transaction the template touches. You're not managing a notification preference per person. You're stating who each piece of work belongs to — which you had to decide anyway.

1. Narrow the Task's Visibility on the Template

Start here, because it's the only lever that fixes the problem rather than routing around it. Every task has a visibility setting — Anyone, Admins, Listing Agents, Selling Agents, both, or a specific @mention — and whoever can see a task is who gets reminded about it. Set the broker's compliance items to admins, set the agent's document tasks to the agent, and both inboxes shrink to the work they're actually accountable for.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility

> Set it on the checklist template and it carries to every transaction that gets the checklist. Changing it on one live transaction fixes that file only — tasks already sitting on active deals need updating individually.

2. Turn the Reminder Off for One Person

When someone shouldn't get the email at all — an agent during a rollout, a broker who works from the Tasks page instead, a user who asked — there's a per-user switch for it in their profile under Manage Users. Agents can't reach it themselves, so it's an admin who does this on their behalf.

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

> This is the one automatic email you can silence for a single person. Closing and expiration reminders and doc comment notifications are company-wide switches — turning either off turns it off for everyone. See Control Which Automatic Emails Your Team Gets.

3. Claim Your Own Tasks With an @Mention

Visibility can't always be narrowed — some tasks genuinely belong to several people, and an admin who oversees the whole office is supposed to see them. What you can do is mark the ones that are *yours*. @mention yourself on the template tasks you personally work, and they become findable as a set instead of dissolving into everyone else's

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See Task @Mentions

4. Work From a Filtered Task List Instead of the Email

With the @mentions in place, the Tasks page will do what the email can't. Filter it to**@ Tasks** and you're looking at your work and nothing else — or filter by an agent, a due-date range, or agent-checked items when you're reviewing rather than doing.

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

5. Save That View So It's One Click Tomorrow

A filter you rebuild every morning is a filter you'll abandon by Thursday. Save it once and it sits in your left menu, re-running fresh each time you click it — which is what turns "ignore the email, open my list" into an actual habit rather than good intentions.

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

6. Run a Second, Smaller Profile When Nothing Else Fits

One case resists everything above: a broker or owner who is a master admin *and* works their own deals. A master admin sees every task in the account by design, and that visibility can't be trimmed — so their reminder will always carry the whole office.

The standing answer is a second profile. Set yourself up as an ordinary user scoped to your own transactions, take the reminder for that profile, and switch the reminder off on the admin account. You still administer the company from one login and get a personal task email from the other. It's a workaround rather than a setting, and it's the only thing that produces a genuinely short list for someone in that seat.

> The reminder setting is account-wide, not per-location. A master admin over two offices can't take reminders for one and skip the other — the second-profile route is what covers that too.