What Pipeline Sends on Its Own

Last Modified on 11/10/2026 12:21 pm EST

Pipeline sends a set of emails nobody on your team writes: a reminder before a close, the day's tasks, a monthly summary. Each has its own switch, and this is where they all are.

Introduction

Some of these go out under your account's support contact, so an agent who has not heard of them assumes a person sent them. Knowing what the account sends on its own is what keeps that from becoming a question for you.

Most are account-wide and a master admin's to set. Two, the daily task rundown and the daily activity digest, are personal settings on each admin's own profile.

1. Warn Agents Five Days Before a Close or an Expiration

One switch for the whole account, and every agent with a deal near its date hears about it. The lead time is five days and the wording is fixed.

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

2. Send Each Person Their Tasks Every Morning

Overdue, due today and due tomorrow, in one email. Admins turn their own on from their profile, and an admin sets it for each agent.

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

3. Get a Morning Digest of What Changed

The transactions added, the ones that changed status, and how many docs are sitting unassigned, for the day before. A personal setting, so each admin decides for themselves.

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. Send Every Agent Their Own Numbers

Once a month, last month's production and the year to date, without anyone running a report. It is two settings rather than one, and a summary cannot be resent.

Once a month, each agent gets their own numbers by email — last month's production plus the year to date, with nobody having to run a report.

See Monthly Production Summary

5. Get Reminded When an Agent's Split Is Due to Change

Five days before an agent's start-date anniversary your admins hear about it, since that is when splits most often change.

Commission splits often change on an agent's start-date anniversary, so Pipeline reminds your admins five days ahead.

See Agent Anniversary Emails

6. Get a Doc Comment to the Agent

An admin comments on a document and the agent gets it by email with a link straight to the doc. A master admin sets whether that happens.

An admin leaves a comment on a doc, and Pipeline emails it to the agent with a link straight to the document.

See Doc Comment Notifications