

Opting Into or Out of Daily Tasks Reminder Emails

SUMMARY

Paperless Pipeline sends out a daily email showing which tasks are overdue, due today, and due tomorrow. You can opt in or out of this email as shown below. You can also opt in or opt out your agents from receiving this email. This article shows you how to do this.

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Turn Daily Task Reminders On or Off

If you are an admin, and want to turn the daily task reminder on or off for your own account:

- 1 Click your name in the upper right corner then "Personal Profile".
- 2 From the Personal Profile page, toggle this setting on or off by clicking "Receive daily email with upcoming tasks".
- 3 Click [Save].

Manage Agent Settings

Only admins can use this method to manage their own email notifications.

Agents can not change this setting on their own profile. An admin needs to turn it on or off for them.

To turn the reminders on or off for any user:

- 1 Click your name in the upper right corner then "Admin / Settings".
- 2 Click [Manage Users] from the left menu.
- 3 From the Manage Users page, click the user's name to edit their settings.
- 4 Check the checkbox "Send daily email with upcoming tasks to this user" to turn these email notifications on for the user. Uncheck the option to turn the notifications off.
- 5 Click [Update User] to save the settings.