

Agent Anniversary Emails

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

Introduction

Most brokerages reset an agent's split or their cap on the anniversary of the day they started. It's a real change to how a deal pays out, and it sits on a date nobody has reason to look at for most of the year.

The anniversary reminder puts that date in front of the people who'd have to act on it. Five days ahead of an agent's start-date anniversary, Pipeline emails your admins, reading the date from the **Start Date** already on that user's profile rather than from anything you keep alongside it. The agent whose anniversary it is doesn't get a copy, because what the notice is for is the paperwork behind the change rather than the milestone itself.

The split gets updated before a commission calculates on last year's numbers, rather than after somebody notices. It rides entirely on that start date, so a profile with the date filled in is a profile Pipeline can remind you about.

How It Works

An account setting, a five-day lead time, and a recipient list of the admins who can actually change a commission split.

When It Sends

Five days before each user's Start Date anniversary.

Who Receives It

Master admins, and location admins who have the **Manage Users** permission.

What It's For

The reminder exists for offices whose commission splits change on an agent's anniversary. It's a nudge to go update the agent's commission information — it doesn't change anything on its own.

Where the Date Comes From

Each user's **Start Date**, entered on their profile. It doesn't have to be the day they joined; it's whatever date the office wants the year to turn over on.

One Switch, Whole Account

This is a company setting, and the email carries no unsubscribe link. An admin who doesn't want them either asks a master admin to turn them off for the account or filters them in their own inbox.

Turn Agent Anniversary Emails On or Off

Switch the five-day anniversary reminder to admins on or off for the account.

Who Can Do This: Master admins.

To turn agent anniversary emails on or off:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Scroll to *Email Settings*.
3. Check **Email admins agent anniversary reminders** to turn the reminders on, or uncheck it to turn them off.
4. Click [Save Settings].

Your admins start — or stop — receiving anniversary reminders from that point on.

Agent Anniversary Emails FAQ

Agent anniversary reminders email your admins five days before each user's start-date anniversary, driven by the Start Date on the user's profile. Answers to the common questions about who receives them, what they do and don't change, and how to stop them. See [Agent Anniversary Emails FAQ](#).
