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.

Frequently Asked Questions

Who gets the anniversary reminder?

Master admins, and location admins with the Manage Users permission. The agent whose anniversary it is doesn't receive it.

How far in advance does it arrive?

Five days ahead. It's sent five days before the user's Start Date anniversary.

Why am I suddenly receiving these?

Someone turned on the account setting. Email admins agent anniversary reminders is company-wide, so switching it on starts the reminders for every qualifying admin at once.

How do I unsubscribe?

There's no unsubscribe link. A master admin turns them off for the account from *Admin / Settings*. If they're useful to everyone but you, a rule in your own inbox will file them away.

Where does the anniversary date come from?

The Start Date on the user's profile. It doesn't have to be the day they joined — set it to whatever date you want that agent's year to turn over on, and Pipeline follows it every year after.

Does Pipeline reset the commission split automatically?

Not the split itself. On accounts set to use agent start dates for fiscal years, the amount already paid toward the threshold resets on the anniversary. The commission percentage and the threshold value still have to be updated by hand — which is precisely what the reminder is nudging you to do.