

Monthly Production Summary FAQ

Last Modified on 09/04/2026 11:05 am EDT

The monthly production summary emails each agent their prior-month and year-to-date figures in the first week of the month, and it takes both an account setting and a personal one. Answers to the common questions about timing, blank figures, and resends.

When does the summary go out?

In the first week of each month, automatically. The frequency is fixed — it can't be sent more often or less often.

Why is my production summary showing zeros?

A transaction has to clear three bars to count. It must be in **Closed** status, its **Close Date** must fall in the period, and commissions must be entered with a CDA generated. A blank summary almost always means one of the three is missing — searching for Closed transactions in the period with no commissions entered usually finds it quickly.

Why did an agent stop receiving theirs?

No closed production yet this fiscal year. The summary only goes to agents with closed transactions and entered commissions in the current fiscal year, so an agent who had one last year may not get one this year.

Can you resend a summary that didn't arrive?

No — and there's no archive of past ones. The summaries are generated automatically and can't be regenerated. The agent can pull the same figures whenever they need them by running their own commissions report from their profile for any date range.

How do I stop these going to all agents?

Uncheck the company setting. A master admin unchecks **Email monthly production summary to agents** in *Admin / Settings*, under *Email Settings*, and the emails stop for the whole account.

How do I opt out for just myself?

Uncheck it on your own profile. Under *Your Email Settings*, uncheck **Receive monthly production summary by email** and save.

Can it go to a different address than my login email?

No. It's sent to the email address on your Pipeline profile. Sending it somewhere else has to be handled with a rule in your own mail program.

Can I get a quarterly version instead?

Not today. The monthly production summary is the only automated recurring financial email. A quarterly view has to be put together and sent by an admin.

The numbers don't look right. Who do I ask?

Your office admin. The figures come straight from the commission data entered on your transactions, so an admin is the person who can check them and correct anything that's off.

Learn More

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](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
