Monthly Production Summary

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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.

Introduction

Agents want to know how they're doing, and the question usually arrives at the worst moment: mid-month, by text, to whoever runs reports. Somebody pulls the numbers, formats them, and sends them round, and a fortnight later the same question comes again.

The monthly production summary takes that off your desk. Each agent gets their own figures by email, covering the month just gone and the year so far, and they get them without asking anyone or being given access to a report that shows everybody else's. Because it's generated from the transactions already closed in Pipeline, the numbers match what the office would have calculated by hand.

The mid-month text stops arriving, nobody stops to pull the numbers by hand, and agents can see their own trajectory without a conversation about it first.

How It Works

Pipeline builds each agent's numbers from their closed, commissioned transactions and mails them out at the start of the month.

When It Sends

Automatically, in the first week of each month. It can't be sent more often or less often.

What's Included

Each agent's prior-month and year-to-date production figures — sales volume and commissions — for their own transactions only. It's a personal report, not a company one.

Which Transactions Count

A transaction appears only when all three of these are true: it's in **Closed** status, its **Close Date** falls in the period, and commissions have been entered with a CDA generated. A summary that comes through blank almost always means one of the three is missing.

Two Settings, Not One

The company setting **Email monthly production summary to agents** allows the emails; the personal setting **Receive monthly production summary by email** decides whether an individual gets one. Turning the company setting off stops them for everyone at once.

It Can't Be Resent

Pipeline doesn't regenerate or resend a monthly summary, and there's no archive of past ones. An agent who missed theirs can pull the same figures any time by running their own commissions report from their profile for whatever date range they need.

Where It's Available

These settings are available on accounts with the reporting module enabled.

Turn the Monthly Production Summary On or Off for Your Office

Allow — or stop — the monthly production summary going out to agents across the account.

Who Can Do This: Master admins.

To turn the monthly production summary on or off for your office:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Scroll to *Email Settings*.
3. Check **Email monthly production summary to agents** to allow the emails, or uncheck it to stop them.
4. Click [Save Settings].

With the setting on, every agent is set to receive the summary by default and can opt out on their own profile.

Turn Your Monthly Production Summary On or Off

Choose whether you personally receive the monthly production summary.

Who Can Do This: Any user, on their own profile.

To turn your monthly production summary on or off:

1. Click the [Gear] in the upper-right corner, then [My Info].
2. On your *Personal Profile* page, scroll to *Your Email Settings*.
3. Check **Receive monthly production summary by email** to receive it, or uncheck it to stop it.
4. Click [Save Settings].

Your choice applies from the next monthly send onward.

Frequently Asked Questions

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.