Plan Start Dates FAQ

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A start date sets the anniversary an agent's commission year turns over on. Answers to the common questions about choosing the date, the account setting behind it, and what happens at the turnover.

Does the start date have to be the day the agent joined?

No, it can be any date you choose.Enter the date you want that agent's commission year to turn over on, and Pipeline resets their figures on that anniversary every year from then on.

Is this set per agent or for the whole account?

Both, in different places. Each agent gets their own start date on their profile, but the choice between calendar years and start dates is a single account-wide setting that applies to everybody.

What happens to an agent with no start date?

They fall back to the calendar year. That holds even when the account is set to use start dates, and it's the usual reason one agent's year-to-date figures behave differently from the rest of the roster.

How do I switch back to calendar years?

Clear the checkbox in Financial Settings. Uncheck [Use start dates of agents to determine fiscal years for year-to-date calculations] under *Financial Settings* in Company Settings and save. Every agent's commission year goes back to January through December.

Why did a transaction I just entered land in a different year?

Year-to-date figures follow the Close Date, not the date you entered the commission.A deal that closes after an agent's anniversary counts toward their new plan year even if you enter it the week before.

Where can I see every agent's start date?

In the downloaded User List. Download it from *Manage Users* and each agent's start date comes through as its own column, so you can check the whole roster in one pass.

What else follows the start date besides the cap?

Everything year-to-date. The agent's year-to-date pop-up at commission entry and the production figures on their transactions run on the same plan year, so they all turn over together on the anniversary.

Why doesn't the Agent Income report match the year-to-date figure on a CDA?

They're using different date ranges. The CDA figure runs from the agent's own plan year start, while the report's *This Year* preset runs on the calendar year. Run the report with a custom date range starting on the agent's start date and the two line up.

Learn More

An agent's start date is the anniversary their commission year turns over on, and the date Pipeline resets their year-to-date figures from.

See Plan Start Dates

Still Have Questions?

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