Plan Start Dates

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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.

Introduction

An agent who joined in June shouldn't spend half a year paying toward a cap that resets in January. Plenty of offices run everyone on the calendar year anyway, and plenty run each agent from the date they came on, so an agent who started in June caps in June. Pipeline does either one.

A start date on an agent's profile is the anniversary their commission year turns over on. On its own it's just a date. It starts driving the math when an account-wide setting tells Pipeline to use start dates instead of January 1, and from that point everything year-to-date for that agent counts from their own anniversary: what they've paid toward their split threshold, the pop-up you see at commission entry, the production figures on their transactions.

The result is a commission year that matches the deal you actually struck with each agent, rather than one your bookkeeping imposes on them. Worth knowing before you switch it on: this is one decision for the whole account. It's calendar years for everybody or start dates for everybody, so an office that wants a mix has to pick the basis that fits most of its agents.

How It Works

A date per agent, one switch for the account, and Pipeline handles the turnover from there.

The Start Date Field

It sits on the agent's user profile, in the *Commission Percent, Cap, & Notes* section. It doesn't have to be the day they joined — it's whatever date you want their commission year to turn over on. Set it once and Pipeline handles the anniversary every year after.

The Setting That Switches It On

Start dates only drive the math when **Use start dates of agents to determine fiscal years for year-to-date calculations** is checked under *Financial Settings* in Company Settings. That choice is account-wide: it's calendar years for everyone, or start dates for everyone. Leave it unchecked and every agent's year runs January through December.

If an Agent Has No Start Date

With the setting on, an agent whose profile has no start date quietly falls back to the calendar year. It's the usual reason one agent's figures behave differently from everyone else's.

Close Date Decides the Year

Year-to-date figures follow each transaction's **Close Date**, not the day you enter the commission. A deal closing after an agent's anniversary counts toward their new plan year even if you enter it the week before — which is what you want, and occasionally a surprise.

What Turns Over

On the anniversary, the amount the agent has paid toward their split threshold resets to $0. The threshold figure and their commission percent don't move. If the new plan year changes either one, that's a profile edit.

A Reminder Before the Anniversary

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

See Agent Anniversary Emails

Set an Agent's Start Date

> Give an agent the date their commission year should turn over on.

> **Who Can Do This**: Admins with the "Enter financial information" permission for the agent's location, and master admins.

To set an agent's start date:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users].
3. Click the agent's name to open their profile.
4. Scroll to the *Commission Percent*, *Cap*, *& Notes* section and enter the date in the **Start Date** field.
5. Click [Update User].

That date is now the agent's anniversary, and Pipeline rolls their commission year on it from here on. Repeat for every agent whose year you want tracked from their own date.

Base Commission Years on Agent Start Dates

> Switch year-to-date calculations from the calendar year to each agent's own anniversary.

> **Who Can Do This**: Master admins.

To base commission years on your agents' start dates:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Company Settings] from the left menu.
3. Scroll to *Financial Settings*.
4. Check the box next to [Use start dates of agents to determine fiscal years for year-to-date calculations].
5. Click [Save Settings].

Every agent's year-to-date figures now run from their own start date. Clear the box and the whole account goes back to January through December.

Plan Start Dates FAQ

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. See Plan Start Dates FAQ.

Plan Start Dates Troubleshooting

Figures moved when you weren't expecting them to? Start here.

- Why Do an Agent's Year-to-Date Figures Look Wrong?