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

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Year-to-date commission figures follow two things most people don't expect: the agent's own plan year, and each transaction's close date. Almost every surprising number comes back to one of them.

The Figures Reset in the Middle of the Year

If your account is set to use agent start dates, each agent's year turns over on their own anniversary rather than on January 1 — so a reset in April is a reset on schedule.

Check the agent's **Start Date** from *Manage Users*, and check whether *Financial Settings* is set to use start dates. Between those two you'll know which date their year runs from.

A Transaction Landed in the Wrong Year

Year-to-date figures are driven by each transaction's **Close Date**, not by when you entered the commission. A deal with a close date past the agent's anniversary counts toward the new plan year, even if you entered it weeks earlier.

Check the close date on the transaction. If it's right, the figure is right.

An Agent's Commission Summary Is Blank

The commission summary on a transaction shows the agent's current plan year. If their year has just turned over and nothing has closed since, there's genuinely nothing to show yet, and the figures fill back in as soon as a transaction closes in the new year.

The CDA Figure Doesn't Match the Agent Income Report

Different date ranges, not different data. The commission-to-brokerage figure on a CDA runs from the agent's own plan year start, while the *Agent Income* report's *This Year* preset runs on the calendar year.

Run the report again with a custom date range beginning on the agent's start date and the two figures line up.

An Agent's Brokerage Total Reset When Nobody Expected It

When the account is set to use start dates but an agent's profile has no start date, that agent quietly falls back to the calendar year — so their figures turn over on January 1 while everyone else's turn over on their own dates.

To fix it, open the agent from *Manage Users*, scroll to *Commission Percent, Cap, & Notes*, enter their start date, and save.

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?

Numbers still not adding up? Email us at help@paperlesspipeline.com with the agent's name and a transaction to look at, and we'll trace it with you.