YTD Pop-up FAQ

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The YTD Pop-up reads from closed transactions inside the agent's current fiscal year, so what it shows depends on close dates as much as on the agent. Answers to the common questions about zero balances, date ranges, and the commission notes at the bottom.

Why does an agent's YTD Pop-up show $0?

Because nothing has closed yet inside the fiscal year this transaction falls into. The pop-up picks its year from the transaction's Close Date, so a deal closing at the start of a new fiscal year shows a fresh, empty year rather than the one the agent is finishing. That's expected, not a fault.

Why is a closed transaction missing from the totals?

It needs both a Closed status and commissions entered with a CDA generated. A transaction that's closed but never had commissions entered contributes nothing — this is far and away the most common reason a total looks light.

Why doesn't the date range start on January 1?

Because your company calculates fiscal years from agent start dates. When that's on, each agent's year runs from their own start-date anniversary rather than the calendar. Combine that with the range being chosen by the transaction's Close Date and a deal closing a day after an agent's anniversary lands in their brand-new year.

Can I keep the pop-up open the whole time I'm entering commissions?

Not today — it's tied to the agent whose boxes you're in and clears when you move on.That's deliberate, so the screen stays readable when several agents share a transaction. If it's slowing you down, tell us at help@paperlesspipeline.com — that feedback shapes what we build next.

Why is the commission notes section at the bottom empty?

Because no commission notes have been saved on that agent's user profile. The pop-up mirrors that field and nothing else. Add the note to the agent's profile and it shows here the next time you enter commissions for them.

Can I look up an agent's year-to-date numbers without opening a transaction?

Not through the pop-up — it only exists inside commission entry.For a standing view of an agent's production and fees, run one of the Commission Module's financial reports; the Agent Units report carries the full per-agent detail and downloads.

Can agents see the pop-up?

No. The pop-up and the commission notes in it are admin-only. Agents see their own commission, fees, and deductions in the *Financial Info* section of a transaction once commissions are saved, and they can pull their own year-to-date figures from their personal commissions report.

Do pending deals count toward the figures?

No — the pop-up counts closed production only. For a forward-looking picture of what's coming, use the Pending Commissions report, which covers transactions in a Pending status that have a close date and commissions entered.

Learn More

Click into an agent's boxes while you're entering commissions and their year-to-date production appears beside you — closings, volume, units, fees, and the commission notes from their profile.

See YTD Pop-up

Still Have Questions?

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