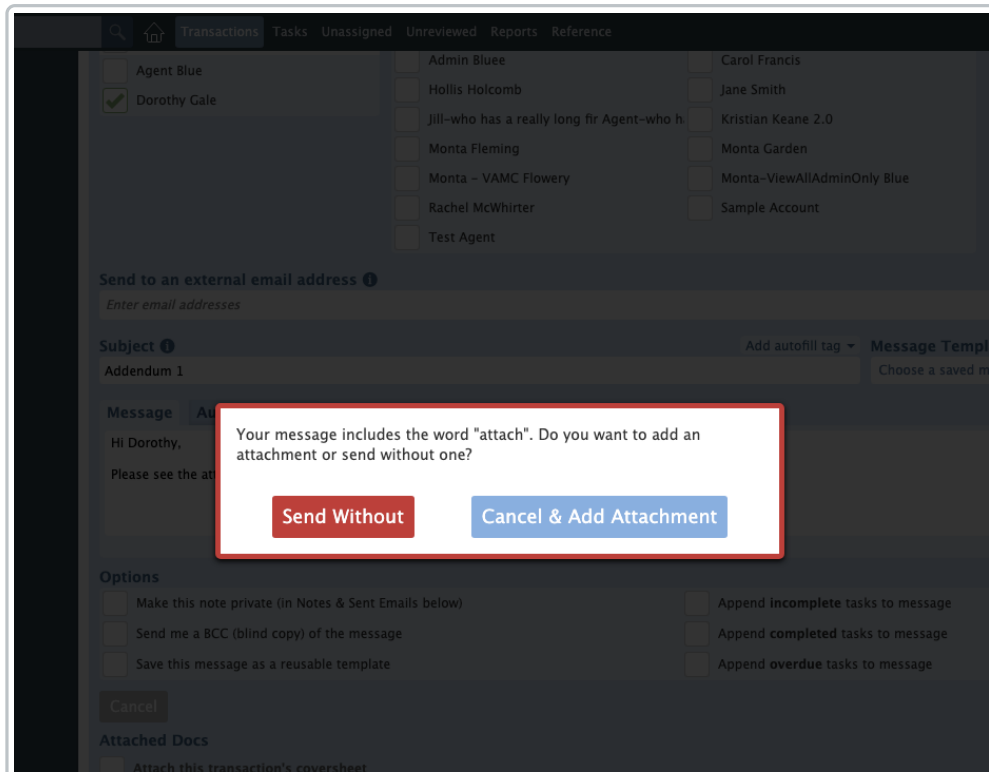


What's New (February 28, 2021)

No more forgotten attachments: When sending a message from Pipeline, the system will warn you if you've mentioned you'll be attaching a doc but haven't attached one.



COMMISSION MODULE

View itemized deductions on key reports: Include a breakdown of deduction amounts on the Agent Income and Commissions & Closings reports by selecting the "Include Deduction Details" option when running the reports. To continue to view deduction totals only, leave the option unchecked.

[Learn more about commission module reports here →](#)

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed **Reports** Reference

Commission & Closings

Location: Company-wide

Closing period: Last Month

Side: Any Side →

Label: Any Label →

☒ Include Deduction Details

Download Report

Financials

- Commission Summary
- Aggregate Performance
- Commission & Closings**
- Listing Inventory Report
- Pending Inventory Report
- Pending Commissions
- Agent Income
- Agent Commissions
- Agent Units
- Agent Production
- Lead Sources

Account Stats

- Total Usage
- Usage by Agent

Transaction Reports

Calculate Fees & Deductions based on a percentage: Agent Fees, Client Fees, and Deductions can now be based on a pre-defined percentage. When setting up fees based on a percentage, specify the default amount (if applicable) along with the desired percentage basis for each fee (e.g., sale price, gross commission, distributable commission, etc). When managing commissions on transactions, your specified basis will be used to calculate the fee amount.

[Learn more about managing fees and deductions here →](#)

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

Manage Agent Fees

Fee Name	Default Fee Amount	Fee % Basis
Marketing Fee	1%	Agent Gross
Unused fee	\$	Select % Basis
Unused fee	\$	Select % Basis
Unused fee	\$	Select % Basis
Unused fee	\$	Select % Basis
Unused fee	\$	Select % Basis
Unused fee	\$	Select % Basis
Unused fee	\$	Select % Basis
Unused fee	\$	Select % Basis
Unused fee	\$	Select % Basis
Unused fee	\$	Select % Basis
Unused fee	\$	Select % Basis
Unused fee	\$	Select % Basis

If you run out spaces for fees, click Save to add more.

Save Settings

People

- Manage Locations
- Manage Users

Customize

- Company Settings
- Transaction Statuses
- Transaction Labels
- Document Labels
- Document Names
- Lead Sources

Templates

- Business Holidays
- Checklists
- Break Apart Docs

Financials

- Agent Fees**
- Client Fees
- Deductions

Search address, mls, agent, seller, buyer

Transactions

Tasks

Unassigned

Unreviewed

Reports

Reference

Transaction Commission Summary

3% listing / 3% buying

Admin Info

This is a sample transaction. When you're ready to delete this transaction, click "Delete this transaction" from the bottom right corner of this page.

Assistants on this transaction:

Jonathan Carey (sample user)

Gross Disbursement

Distributable commission	\$7,500.00
Tammy Sheldon (sample user)	
Agent's gross commission	\$6,750.00
Contribution to broker's gross	\$750.00
Wingman Group	
Broker's gross commission	\$750.00

Edit Prev Step

Fees & Deductions

Broker's Fees & Deductions

Tammy Sheldon (sample user) - Fees & Deductions

Marketing Fee

1%

%

\$

Tax

\$

% Basis: Agent Gross

Calculate & Continue

Co-op Brokerage Commission & Special Instructions

Cooperating Brokerage

Amount

\$

Company name / info

CDA instructions (to be shown above Payables)

CDA instructions Top

CDA instructions (to be shown below Payables)

CDA instructions Bottom

Auto-calculate sales volume: When there is more than one agent on the side of a transaction, Pipeline can automatically allocate sales volume to match the agents' split of commission. Turn this feature on from the [Company Settings](#) page if it fits your company's needs.

[Learn more about managing commissions here →](#)

Search address, mls, agent, seller, buyer

Transactions
Tasks
Unassigned
Unreviewed
Reports
Reference

Admin Info
AGENT SERVICES: (Next to the corresponding service, add Y for Yes or N for No):
Gift Delivery - _
Yard Sign Delivery - _
Close Out in MLS - _

Calculated Commission Amounts

Commission Type	Listing
Gross Commission:	\$5,000.00
Franchise fee:	\$10.00
Net (Gross - Referral - Franchise fee):	\$4,990.00

Next, we will help you distribute the broker/agent commission of \$4,990.00.

Edit Prev Step

Broker / Agent Commission Disbursement
Distribute Listing Commission: \$4,990.00

- Distribute listing gross between 2 agents

Phil Dunphy	50%	%
Charles Leifer	50%	%
- Allocate sales volume and units

Phil Dunphy	Sales Volume	Unit
	\$50000.00	0.5
Charles Leifer	\$50000.00	0.5
- Specify agent / brokerage splits

Phil Dunphy	Brokerage	Agent
	%	%
Charles Leifer	%	%

Calculate & Continue

Fees & Deductions

Run Agent Income report by fiscal year: "Last Fiscal Year" and "Current Fiscal Year" date range options allow you to run the Agent Income report based on an agent's fiscal year.

[Learn more about the Agent Income Report here →](#)

Search address, mls, agent, seller, buyer

Transactions
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Reference

Agent Income
Search for Agent
Enter agent's name
Sea list.

Financials

- Commission Summary
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- Pending Commissions
- Agent Income**
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- Lead Sources

Account Stats

- Total Usage
- Usage by Agent

Closing period
Last Month
Last Month ✓
This Month
Quarterly Ranges
Last Quarter
This Quarter
Year Ranges
Last Calendar Year
Agent's Last Fiscal Year
This Calendar Year
Agent's Current Fiscal Year