

View Year-To-Date Production Numbers for Agents When Generating a CDA

SUMMARY

When managing commissions, Paperless Pipeline will display agents' year-to-date production numbers and other commission-related information.



As of 4/2/17, the "Generate CDA" option has been renamed to Manage/Update Commissions

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View Year-to-date Production Numbers for Agents When Managing Commissions

- 1 Click "Update Commissions" from the left menu of a transaction.
- 2 Complete the information until you reach the "Broker / Agent Commission disbursement" section.
- 3 Click in the agent box to view the agent's year-to-date production amounts and other commission-related information.

Broker / Agent Commission Disbursement

Distribute Listing Commission: \$222,400.00

1 Allocate sales volume and units

Josh James

Sales Volume

\$278000

Unit

1

2 Specify agent / brokerage splits

Josh James

Brokerage

20%

Agent

80%

Calculate & Continue

Fees & Deductions

Broker's Fees & Deductions

+ Collect Client Fee

Enter deduction for brokerage

Josh James - YTD figures (Jan. 1, 2017 to March 21, 2017)

Commission Percent: 80%

Agent start date: Jan. 1, 2007

Closed transactions: 6

Sales volume: \$8,400,000.00

Units: 6

Commissions paid to brokerage: \$13,037.50

Agent fees paid to brokerage

Transaction fee: \$2,160.00

Overdue desk fees: \$100.00

Errors & Omission: \$205.00

Agent totals

Agent gross commission: \$270,178.75

Agent net commission: \$267,713.75

Commission notes

Josh pays \$350 transaction fee.

[Update the commission information for Josh James →](#)

The production amounts will be based on the agent's start date anniversary, or if the agent doesn't have a start date specified, the totals will be based on calendar year.

Information Displayed Includes:

- Current commission percent
- Start date
- Number of closed transactions
- Total sales volumeTotal units (or sides) closed
- Commissions paid to brokerage / Agent fees paid to brokerage
- Agent gross commission
- Agent net commission.

Navigate to an Agent's Commission Notes

The "Commission notes" section will display commission notes from that agent's user profile.

- 1 Click "Update commission info" to be taken to the agent's profile where you can update the agent's split or other commission information.

Changing information in the Commission Notes section will trigger an email to be sent to admins reminding them to check that agent's pending transactions to determine if you need to update any commissions.

Related Topics

[Commission & CDA Settings →](#)

[Add agent commission splits →](#)