# Send Closed-Deal Commission Data Into QuickBooks

Last Modified on 09/04/2026 11:09 am EDT

The payouts your CDA already worked out can arrive in QuickBooks Online as bills the day a deal closes, instead of being keyed in again at month end.

## Introduction

Every brokerage running commissions in Pipeline eventually notices it's typing the same numbers twice — once into the CDA, once into QuickBooks. Zapier closes that gap. A transaction moving into your closed status hands Zapier the whole financial picture of the deal, and QuickBooks Online turns it into bills, expenses, or invoices.

This is the most involved of the Zapier builds, and it's worth knowing why before you start. The simple pieces map straight across: the brokerage's side, an agent payout, an outside referral. The parts that need real work are the ones where money splits per agent, because Pipeline sends agent financials and agent deductions as separate collections that have to be matched back together before QuickBooks can see them. Plan for that rather than discovering it in the mapping screen.

## When to Use This

- You're re-keying every CDA into QuickBooks by hand and want the closings to post themselves.
- You want agent payouts, in-house referral fees, and transaction coordinator fees to land as QuickBooks bills.
- You're gathering agent payment data for 1099s and want it accumulating all year rather than at the end.
- You run QuickBooks Desktop and need to know whether this applies to you.
- Your Zap fails with "Required field amount is missing," or your TC deduction fields never appear in the QuickBooks step.

## Why This Doesn't Map One Field to One Field

The mapping screen invites a wrong assumption. You pick the QuickBooks Create Bill action, you go looking for "TC fee" in the field list, and it isn't there — so it looks like Pipeline doesn't send it. Pipeline does send it. It just arrives in a different collection from the agent it belongs to, and Zapier won't guess the relationship for you.

What makes those fields appear is joining the two sides first: a Code step that matches agent financials to agent deductions by agent ID, wrapped in a loop that runs each agent on their own. Once that join exists, the deduction fields show up in the mapping list like anything else. It's an afternoon of work, not a limitation.

## 1. Confirm You're on QuickBooks Online

Zapier connects to QuickBooks Online only. There is no route to QuickBooks Desktop through Zapier, and no workaround that changes that — if your books live in Desktop, this build isn't available to you.

QuickBooks Online is also a premium app on Zapier's side, so you need a paid Zapier plan. Nothing here costs anything from us; Zapier bills you for the plan, and the multi-step Zaps this build needs aren't available on the free tier.

## 2. Build Your Chart of Accounts First

Set up the QuickBooks Online Chart of Accounts before you touch Zapier. The Zap's action step asks which account a bill or expense posts to, and if the accounts don't exist yet you'll be rebuilding the mapping afterward.

Your agents need to exist in QuickBooks too, as Vendors or Customers depending on how you pay them, because each posted transaction has to tie to a matching record. Pipeline has no trigger for a new user being added, so there's no Zap that creates a vendor the moment you onboard an agent — the usual approach is to include QuickBooks' **Find and Create Vendor** action inside the closing Zap, so QuickBooks creates the vendor on that agent's first closing if it isn't already there.

## 3. Name the Status the Zap Will Watch For

Pipeline gives Zapier one trigger — a transaction changing status — and it fires on the exact status you choose. That makes your status list the control surface for the whole build, and it's why many offices add a status like "Closed - Reviewed" specifically for this: the deal moves there once an admin has checked the CDA, and only then does anything reach the books.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See [Transaction Statuses]

## 4. Connect Pipeline to Zapier

The connection is account-level and a master admin has to make it, so settle who owns it before you build anything on top.

Connect Pipeline to QuickBooks, your CRM, or a spreadsheet, and let a transaction changing status kick off whatever comes next.

See [Zapier Integration]

## 5. Map the Commission Fields to a QuickBooks Action

With the trigger tested, you add the QuickBooks Online action — **Create Bill** for an agent payout, **Create Expense** for a cost the brokerage absorbs, **Create Invoice** where you're billing someone. Each one wants an account from your Chart of Accounts and a matching Vendor or Customer.

The trigger payload arrives in named collections — transaction info, agents, contacts, agent fees, client fees, broker financials, CDA info, agent financials, agent deductions, in-house referrals, and outside referrals among them. Straightforward payouts and referral fees map directly from these.

> Email help@paperlesspipeline.com and we'll send you the spreadsheet listing every field the trigger passes, grouped by collection. It's the fastest way to plan a mapping before you start clicking, and it's how you find out which collection a number you're looking for actually lives in.

## 6. Add the Filter, Code, and Looping Steps Per-Agent Deductions Need

This is the step that makes a multi-agent deal work. Three inserts sit between the trigger and the QuickBooks action:

To handle a per-agent deduction such as a transaction coordinator fee:

1. Add a **Filter by Zapier** step so the Zap only continues for transactions that actually carry the deduction you're posting.
2. Add a **Code by Zapier** step that matches agent financials to agent deductions by agent ID, so each deduction attaches to the agent it came out of.
3. Add a **Looping by Zapier** step so the QuickBooks action runs once per agent rather than once per transaction.

With that join in place, the deduction fields become available in the QuickBooks step and you can map them normally.

> Add a guard in the Code step that skips any deduction with a missing or blank amount. Without it, QuickBooks rejects the whole bill with "Required field amount is missing," and the run fails on a deal that was otherwise fine.

> Using both internal and external transaction coordinators? The same Code step is where you tell them apart. An external TC paid through escrow has no internal agent financial record to match against, so checking for a valid payee ID on the deduction label excludes them automatically — which is what you want, since their fee isn't your expense.

## 7. Know What a Later CDA Edit Does — and Doesn't

The Zap fires on a status change and nothing else. Correct a CDA a week after closing and QuickBooks doesn't hear about it — the bill you already posted stays exactly as it was, and you make the correction in QuickBooks by hand.

That's worth building a habit around rather than a workaround: get the CDA right before the transaction moves into the status that posts it, which is the whole argument for a review status in the first place.

> Editing a CDA on an old transaction doesn't change its original closing date either, so a correction made this year won't quietly move a prior-year closing into this year's numbers.