Close Out Commissions for an Agent Who Already Left

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An agent left, a deal they were on is closing, and their profile is switched off. Turn it back on for the length of the paperwork — the numbers survive the round trip untouched.

Introduction

Offboarding is usually clean until a file comes back. The agent's gone, their profile is deactivated, and now a transaction they worked reaches closing and needs its commission entered and its CDA produced. You open the file and either the option isn't there or their name isn't available to put the money on.

That's deliberate. You can't put a deactivated agent on a new or updated CDA, because Pipeline treats deactivation as "no longer receiving," and it applies that to disbursement documents. Everything already generated is untouched: old CDAs, past commissions, their production in your reports. Nothing new can name them.

So you reactivate, do the paperwork, and deactivate again. It takes two clicks either side of the work you were going to do anyway, and nothing about the profile changes in between.

When to Use This

- A departed agent's deal is closing and you need to produce their CDA.
- You need to update a CDA on a transaction whose agent has since been deactivated.
- Manage Commissions isn't appearing on a transaction and the only agent on it is inactive.
- An agent earned nothing on a deal but the CDA still has to show them.
- A commission was credited to the wrong one of an agent's profiles.

Why This Beats Editing the CDA Anyway

There's a version of this where you don't reactivate — you just open the CDA and edit around the missing agent. It appears to work, and it's the one to avoid. With the agent inactive and unavailable to receive commission, editing a CDA can quietly redistribute their share to another agent on the file. Nothing warns you; the document comes out with someone else's name against money that wasn't theirs.

Reactivating first removes that possibility entirely. The agent is available, the money lands where it belongs, and the document says what it should. Two clicks buys you a disbursement you don't have to go back and unpick.

1. Reactivate the Profile

Do this before you touch the transaction. On Manage Users, show all users — deactivated ones are hidden by default — find the person, and activate them.

Bring a former user back into Pipeline with their history intact.

See User Reactivation

They come back exactly as they were: same profile, same history, same commission plan. They can also log in again for as long as the profile is active, which is the one reason to keep this window short.

> If the person left on difficult terms, reset their password when you reactivate them, or do this work outside their hours. The profile is a live login for as long as it's on.

2. Check an Active Agent Is on the Transaction

If *Manage Commissions* isn't in the transaction's menu at all, this is usually why: the option needs at least one active in-house agent on the file, and an assistant doesn't count. A transaction whose only agent was deactivated has no commission workspace to open.

Reactivating in step 1 normally fixes this on its own. If it doesn't, check who's actually assigned to the deal.

Put the right agents on each side of a transaction so Pipeline credits the deal correctly and everyone can open the file and work it.

See Assign Agents

3. Enter the Commissions and Generate the CDA

With the agent active, this is ordinary commission work — open Manage Commissions on the transaction, enter or update the figures, and generate the CDA. Their commission plan came back with them, so their split fills in as it always did.

If they earned nothing on this deal — a house deal, a file that transferred, a referral that went elsewhere — the same route applies with 0% entered. The point is to produce a disbursement document that's correct, not one that quietly leaves them off.

> Wrong profile credited? Fix that before you generate anything. Open **Edit Transaction**, change the agent assignment to the right profile, then re-enter the commissions so the CDA regenerates against it. Swapping the agent alone doesn't move money that's already been entered.

4. Deactivate the Profile Again

Paperwork done, close the door again. Deactivate the profile and everything you just did stays exactly as it is — the CDA you generated is permanent, the commission figures stay on the transaction, and their production keeps appearing in your reports for every period it belongs to.

Turn off a user's access when they leave — without losing any of the work tied to their name.

See User Deactivation

> Expecting a few more of these? An agent with several deals still in flight is worth leaving active until the

> last one closes, with their permissions stripped back so they can't do anything but exist. It's fewer round trips than reactivating each time a file lands.
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> An agent leaves and their work stays exactly where it is. Deactivation ends their access without touching a single transaction, document, or commission tied to their name.
>
> See Offboard a Departing Agent Without Losing Their Files