Track a Lease or Commission That Renews Every Period

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A lease that renews, a management fee that arrives monthly, a commission paid in two halves a year apart. Each period needs its own transaction — and Pipeline will spin them off for you, linked, without touching your quota.

Introduction

One transaction holds one commission disbursement. That's the constraint everything here follows from: you cannot stage three installments on a single file and have all three appear in your reports, because there's only ever one CDA.

So each period becomes its own transaction. The good news is that you don't rebuild anything. New Offer spins the next period off the last one, carrying the property and the listing detail across, links the two so the chain stays traceable, and the first five spin-offs from a property don't count against your monthly quota.

When to Use This

- You manage a property that generates a commission every month rather than once.
- A commercial lease pays out in two disbursements months apart.
- A tenant renewed and you need the renewal tracked separately from the original lease.
- You entered a second commission on a transaction and the first one disappeared.
- Your rental commissions aren't showing up in the year's financial reports.

Why This Beats Reusing One Transaction

The instinct is to keep everything about the property on one file and just update the commission each time a payment comes in. It looks tidier, and it costs you the record: entering the new commission replaces the old CDA, so the payment you recorded in March is gone by June, and your year-end numbers are one twelfth of what the property actually produced.

A transaction per period keeps every disbursement intact, each with its own CDA and its own close date, and the chain of links means you can still see the whole property's history from any one of them.

1. Enter This Period's Commission First

Start on the transaction you already have. Record the commission for the period that's just been earned and generate its CDA — that's this file's job done, and it's what shows up in your reports for that period.

2. Move It Into a Status That Offers New Offer

By default the New Offer option appears on transactions sitting in a Pending, Fell Through, or Auto Expiry status. Move the transaction into one of those so the option shows.

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

See Transaction Statuses

3. Spin Off the Next Period

Create the New Offer. The property, the listing details, the contacts and the listing documents all come across, and Pipeline links the new transaction back to the one it came from.

Name it so you can read a year of these at a glance. Most offices put the period in the name — *121 Waterloo Drive — May 2026* — or number the installments, *1/2 — 2025* and *2/2 — 2026.*

Restart a deal or manage multiple offers without starting over — New Offer gives you a clean, linked transaction.

See New Offers

> The first five New Offers spun off a property don't count against your monthly transaction quota, so a lease that renews annually costs you nothing extra for five years.

4. Close the Original

Now move the transaction you just spun off *from* into a closed status. This is the step that's easy to skip and expensive to skip: financial reports only count transactions in a Closed status with a close date in the period. A management transaction that never closes never appears in anyone's production numbers, no matter how many CDAs are attached to it.

Finished deals should drop off your list on their own. If they aren't, the fix isn't the status name — it's the category behind it.

See Keep Your Active Transactions List Clean

5. Ask Us to Remove the Status Shuffle

Doing this every month? The move-to-Pending-then-back-to-Closed dance gets old fast. Support can switch a setting on your account that makes New Offer available from *any* status, so you spin the next period straight off the current transaction and leave its status alone.

Ask your master admin to make the request — it's an account-level change and we need their authorization for it.

> An incoming referral paid in installments is the exception to all of this. Support's answer there is to keep the installments on the one transaction rather than spinning off — the referral is a single deal being paid in pieces, not a property producing repeatedly.

> Setting rentals up in the first place — labels, fields, statuses, keeping the money out of your sales averages — is its own job. See Run Rentals and Property Management in Pipeline.