Commission Notes FAQ

Last Modified on 09/04/2026 11:16 am EDT

Commission Notes are free-text plan details stored on an agent's user profile. Answers to the common questions about who can see them, where they appear, and what offices keep in them.

Can agents see their own commission notes?

No. Commission notes are limited to admins by design, so an agent never sees what's recorded on their own profile.

Do commission notes appear on the transaction?

No, and they never have. Notes show in exactly two places: the **Commission Notes** field on the agent's profile, and the bottom of that agent's year-to-date pop-up when an admin is entering commissions.

Why aren't an agent's notes showing in the year-to-date pop-up?

Usually because none are saved on that agent's profile. Open them from *Manage Users*, check the **Commission Notes** field, and save. If the notes are there and still don't appear, send us the agent's name and the transaction and we'll look.

Can I use notes to handle an agent with two different splits?

Yes, and it's the common approach. Keep the split they use most in the **Commission Percent** field, write the other one in their notes — "Lease commission split: 75/25" does the job — and adjust the percentage on the transactions where the second split applies.

Can a note automatically apply a fee or a fine to the next closing?

No, a note is a reminder rather than a rule. It puts the charge in front of you at commission entry and you enter it under fees and deductions yourself, then clear the note once it's been collected.

Can I copy a note into the CDA?

Yes, in one click from the agent's year-to-date pop-up. The note drops into the CDA's special instructions while you're entering commissions, and you can edit it from there. It's why offices keep payable addresses and wiring preferences in the notes.

Can I see every agent's notes at once?

Download the User List from Manage Users. Commission notes come through as a column, so you can read the whole roster's plan details side by side instead of opening profiles one at a time.

Can you load commission notes for us in bulk?

Yes — send us a spreadsheet. Give us the notes you want on each profile and we'll load them, along with commission percents, split thresholds, and start dates if you're setting up more than one field.

Learn More

Some of an agent's plan won't fit in a percentage field. Commission Notes hold the rest, and show up right where you enter commissions.

See Commission Notes

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.