Commission Notes

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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.

Introduction

An agent's arrangement rarely fits in one percentage. There's a flat fee on referrals, a mentor split that runs until the end of the year, a fine still owed from a deal that fell apart. The fields on the profile hold the percentage and the threshold, and the rest of the plan has to live somewhere too.

That's the free-text box sitting alongside those fields. Whatever you write there travels with the agent rather than with a file, so it outlasts a deal falling through and it's still waiting next January. And it surfaces where you need it, at the bottom of that agent's year-to-date pop-up while an admin is entering commissions on one of their transactions. It stays on the admin side of Pipeline, which is why offices use it for the parts of a plan they'd rather not publish.

Six months from now, whoever enters commissions on that agent's deal sees what you saw when you set the plan up. One thing worth being plain about: a note is a note. It puts the fact in front of the admin at the right moment, and it doesn't apply a fee or shift a split on its own.

How It Works

Type it once on the profile, see it every time you enter that agent's commissions.

Where Notes Show Up

Two places, and only two: 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 on one of their transactions.

Who Can See Them

Admins only, deliberately. Commission notes don't appear on the transaction itself and they aren't visible to the agent, so you can record the sensitive parts of a plan without worrying about who's reading over your shoulder.

What Offices Keep There

The pattern is the same across offices — anything the fields above it can't express:

- A secondary split for a different kind of deal, like "Lease commission split: 75/25".
- A flat fee for an agent who isn't on a percentage at all.
- A recurring fee or a one-off charge still owed, so you catch it at the next closing.
- An agent's payable address, payment preference, or wiring instructions, ready to copy into the CDA's special instructions.
- The benchmark where the agent moves to their next split, or the gross figure behind a threshold that's entered as a brokerage number.

Notes in the User List

Commission notes come through on the downloaded User List, so if you'd rather read every agent's plan side by side than click through profiles, download the list.

Add Commission Notes for an Agent

Record the plan details that don't fit a percentage, so they're in front of you at commission entry.

Who Can Do This: Admins with the "Enter financial information" permission for the agent's location, and master admins.

To add commission notes for an agent:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users].
3. Click the agent's name to open their profile.
4. Scroll to the *Commission Percent, Cap, & Notes* section and type the details into the **Commission Notes** field.
5. Click [Update User].

The next time you enter commissions on one of that agent's transactions, the note is at the bottom of their year-to-date pop-up. Come back and edit or clear it whenever their plan changes.

Commission Notes FAQ

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. See Commission Notes FAQ.