Split Thresholds

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Agents who move up a tier after generating enough for the brokerage get tracked automatically, and Pipeline warns you on the transaction that takes them over.

Introduction

An agent caps, nobody notices, and the check goes out at the old split. It's an easy thing to miss, because the deal that takes someone past their number looks like every other deal right up until you're entering it.

A split threshold is the dollar figure an agent has to generate for the brokerage before they move up to their next split, and it goes on their profile beside their commission percent. From there Pipeline keeps a running total of what that agent has paid the brokerage this plan year and highlights them while you're entering commissions on the transaction that looks like it crosses the line. The number being counted is the brokerage's side of the money, not the agent's gross, which is the one thing most worth getting right when you set the figure.

So you find out before the disbursement instead of after. The warning is a prompt, though, not an automation. It doesn't divide the crossing transaction and it doesn't move anyone to their new tier; you make both of those calls from the final numbers. That's more work than an automation, and it's also the reason no agent's pay changes without a person choosing it.

How It Works

Set a dollar figure, let Pipeline count toward it, and watch for the warning at commission entry.

What Counts Toward the Threshold

Only the brokerage's side of the money: the *Broker's Split of Commission* plus the *Broker's Split of Referral Commission* the agent generates. Not the agent's own gross commission, and not agent fees or deductions, which is why an agent on a flat-fee plan shows nothing against their cap.

Which Transactions Count

A transaction reaches the threshold once it's in a Closed status with commissions entered and a CDA generated. A deal that closed but never had commissions entered is invisible here, and to your financial reports along with it.

Pending Deals

Pending transactions sit outside the count by default, so an agent with several deals in flight can look further from their cap than they are. Turning on **Display Pending transaction totals in the year-to-date commission threshold section** in your *Financial Settings* adds them to the year-to-date view.

The Orange Warning

When a transaction may push an agent past their threshold, Pipeline highlights that agent's name in orange in the *Broker / Agent Commission Disbursement* step. There's no pop-up and no email, and nothing is blocked — the highlight is the whole signal, so it's worth knowing to look for it.

Because Pipeline is working from the agent's commission percent and the commission on the transaction before you've finished entering it, the warning is deliberately cautious. It flags agents who look close, and you make the call from the final numbers.

One Threshold at a Time

Pipeline tracks a single threshold per agent. Multi-tier plans get stepped through one tier at a time: when an agent clears one, enter their new percent and the next threshold, and tracking picks up from there.

What Resets and What Doesn't

At the start of each plan year, whether that's January 1 or the agent's start-date anniversary, the amount paid toward the threshold resets to $0 on its own. The threshold figure itself and the commission percent don't. Those are yours to update each year.

Set an Agent's Next Commission Split Threshold

Enter the dollar amount an agent has to generate for the brokerage before their split changes.

Who Can Do This: Admins with both the "Create users and locations" and "Enter financial information" permissions, and master admins.

To set an agent's next commission split threshold:

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 enter the agent's current share in the **Commission Percent** field.
5. Enter the dollar amount in the **Next Commission Split Threshold** field. Leave it empty for agents who aren't on a tiered plan.
6. Click [Update User].

Pipeline starts counting what that agent generates for the brokerage from here, and warns you while you're entering commissions on the transaction that looks like it will take them over.

Calculate an Agent's Pro-Rated Split

Split the commission on the capping transaction between the agent's old rate and their new one.

Who Can Do This: Admins with the "Enter financial information" permission.

To calculate an agent's pro-rated commission on the transaction that takes them over:

1. Click [calc pro-rated splits] while managing commissions on the transaction that pushes the agent past their **Next Commission Split Threshold**.

2. Enter the agent's new rate in the **Next agent commission split %** box.
3. Review the calculations, then click [Update Commissions].
4. When Pipeline offers, click [Edit Profile] and update the agent's commission percent and next threshold for the tier they've just moved into.

The agent's commission comes through as a dollar amount on that transaction, and the rest of commission entry carries on as normal.

Frequently Asked Questions

Is the threshold based on the agent's gross commission?

No — it counts only what the agent generates for the brokerage. If your plan is written against the agent's gross, work out what share of that flows to the brokerage and enter that: an agent on a 35% broker split with a $60,000 gross target gets a $21,000 threshold. Note the real number in their commission notes so nobody wonders about it later.

Does Pipeline stop taking the brokerage's share once an agent caps?

No, and nothing is blocked. Pipeline highlights the agent in orange on the transaction that looks like it will take them over, and you adjust the disbursement. The pro-rating calculator is there to work out the split on that one transaction.

Does the threshold reset at the start of the year?

The amount paid toward it does; the threshold itself doesn't. The running total returns to $0 on its own at the turn of the plan year. The threshold figure and the agent's commission percent stay exactly as you left them, so update the profile if either changes for the new year.

Can I exclude certain transactions from an agent's cap?

Not with a setting. Two workarounds are in common use: raise the agent's threshold by the commission that shouldn't count, so the two cancel out; or treat the threshold as a reference and reconcile the exclusions from the *Agent Income* report. Lease deals and company-generated leads are the usual reasons offices ask, and we've passed that along.

Can I reset an agent's threshold in the middle of the year?

There's no one-click reset — add what they've already contributed. Enter the running total plus the new threshold so the remaining distance comes out right. An agent $12,400 into a plan year who needs a fresh $30,000 threshold gets $42,400.

Can an agent have more than one cap?

One at a time. Multi-tier plans get stepped through as the agent clears each tier — new percent, new threshold. Separate simultaneous caps, like a franchise cap alongside a marketing cap, have to be tracked outside this field.