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.

Split Thresholds FAQ

A split threshold is the dollar amount an agent has to generate for the brokerage before their split changes. Answers to the common questions about what counts toward it, when it resets, and what Pipeline does when an agent caps. See Split Thresholds FAQ.

Split Thresholds Troubleshooting

Warning didn't show up, or showed up too early? Start here.

- Why Isn't the Commission Cap Warning Working?