

Stop Retyping an Agent's Payment Details

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Direct deposit details, a mailing address, a licence number, an odd split for lease deals — everything about an agent that has no field of its own goes in one place, and shows up exactly where you need it.

Introduction

Every office has a handful of agents whose arrangement doesn't fit in a percentage box. One takes payment through a bank they want you to wire to. One has a different split on leases. One is working off an advance. One needs their licence number on the disbursement.

None of that has a dedicated field, and the usual result is that it lives in somebody's head or a note on a monitor, and gets retyped onto every CDA. Commission Notes is the field for it. It hangs off the agent's profile, and it surfaces automatically in the year-to-date pop-up the moment you click into that agent's boxes during commission entry, with a copy button that drops the text straight into the CDA's instructions.

When to Use This

- You're retyping the same agent's wire or direct-deposit details onto every CDA.
- An agent's mailing address or licence number has to appear on the disbursement.
- One agent has a different split for leases, referrals, or their own purchases.
- An agent is on a flat fee or working off an advance and you keep having to remember it.
- You want to see every agent's arrangement in one place rather than opening profiles one by one.

Why This Beats a Note Somewhere Else

The natural place to keep an agent's odd arrangement is wherever you already keep notes — a spreadsheet, a shared doc, a sticky. It works right up until the person who wrote it isn't the person entering the commission.

What Commission Notes does differently is show up on its own. You don't have to remember that this agent has an exception, because the exception appears beside you at the exact moment you're typing their numbers. That's the difference between a record and a reminder, and it's why support points here for every "can we save this so I stop retyping it" question.

1. Write the Details on the Agent's Profile

Open the agent from Manage Users and fill in **Commission Notes**. Anything belongs there that you'd otherwise have to remember: bank or direct-deposit details, a payable mailing address, a licence number, a non-standard split, a flat-fee arrangement, a cap, an outstanding fine or advance.

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](#)

Write it for whoever enters commissions next, not for yourself. Full sentences and exact figures — this is the text that gets pasted onto a document a title company reads.

2. Copy It Onto the CDA While You Work

When you click into that agent's boxes during commission entry, their notes appear in the year-to-date pop-up alongside their production figures. One click copies them, and they paste straight into the CDA's special instructions — edit anything deal-specific before you save.

Click into an agent's boxes while you're entering commissions and their year-to-date production appears beside you — closings, volume, units, fees, and the commission notes from their profile.

See [YTD Pop-up](#)

Wire instructions, a mailing address, an MLS number, a fee to collect from the other side — real closing details with no box to put them in. There's one field for all of it, and it prints.

See [Tell Title Something the CDA Has No Field For](#)

3. Pull Every Agent's Arrangement in One File

Commission Notes come out in the downloaded User List — column O — so a single download from Manage Users gives you every agent's plan side by side. That's the review that catches the agent whose notes still describe last year's split.

The Manage Users page lists everyone on your account — the active roster by default, with each person's record a click away.

See [Users List](#)

4. Keep the Notes Current

Nothing expires a Commission Note. An advance that's been repaid, a cap that's been reached, a split that changed at the agent's anniversary — all of it keeps appearing beside the person entering commissions until someone edits it out.

Make the download in step 3 a periodic habit and clean up what's gone stale. A note that's wrong is worse than no note, because it's read as current.
