Track Each Agent Toward Their Annual Cap

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A cap only works if Pipeline knows two numbers about each agent and can see the deals behind them. Set those, and the warning finds you while you're entering the commission that crosses the line.

Introduction

Most brokerages run some version of a cap: the agent splits with the office until they've generated a certain amount for it, then their split improves. The arithmetic is easy. Noticing the moment it happens, on the right transaction, for the right agent, is the part that goes wrong.

Pipeline tracks it from two fields on the agent's profile and warns you where you'll actually be looking — inside commission entry, on the deal that takes them over. There's no email and nothing gets blocked; the agent's name turns orange while you're working, which is enough, because that's the exact moment the number matters.

When to Use This

- Your agents cap and you're tracking who's close on a spreadsheet.
- You want to know before you finish a CDA whether this deal takes someone over.
- An agent says they capped two deals ago and you need to check.
- An agent crossed their threshold mid-transaction and you need the split pro-rated.
- You set the fields and no warning has ever appeared.

1. Set the Two Fields on the Agent's Profile

Both live on the user's own record, and both have to be there — one without the other tracks nothing.

To set up an agent's cap:

1. Open the agent from Manage Users and edit their profile.
2. Set their **Commission Percent** — the split they're on right now.
3. Set their **Next Commission Split Threshold** — the amount they need to generate for the brokerage before the split changes.
4. Save.

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.

See Split Thresholds

> The threshold measures the *brokerage's* side of the money, not the agent's earnings and not the gross. Fees and deductions don't count toward it either — only the commission the brokerage actually took.

2. Watch for the Warning While You Enter Commissions

Click into an agent's boxes during commission entry and their year-to-date figures appear beside you, including what they've produced for the brokerage before this transaction. As they approach or pass the threshold, their name turns orange.

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

> There's no email alert and nothing is prevented — the highlight is the whole mechanism. It's deliberately placed where the decision gets made rather than in an inbox you'd read the next morning.

3. Pro-Rate the Deal That Crosses the Line

When a single transaction takes an agent from one side of the threshold to the other, part of it belongs at the old split and part at the new one. Pipeline works that out for you during entry — the pro-rating control returns the blended figures, which you enter as dollar amounts rather than percentages, since a blended split isn't a clean percentage of anything.

Manage Commissions is the one screen where you record a transaction's money, and it's what your CDA and every financial report are built from.

See Manage Commissions Workspace

4. Verify Against a Report

When someone disputes where they stand, check it against the reports rather than the pop-up. Both**Agent Income** and **Agent Production** carry the brokerage's split of commission, which is the figure the threshold is measured on.

One agent, every number. The Agent Income report takes a single agent's transactions from gross commission down to net payable, line by line.

See Agent Income

> A cap can only count what Pipeline can see. Only closed transactions with commissions entered and a CDA generated contribute, so an office that started mid-year — or that has deals sitting unfinished — will show agents further from their cap than they really are.

5. Step the Threshold When They Cap

An agent has one threshold at a time, so moving them up a tier is a manual edit: go back to their profile, raise the Commission Percent to their new split, and set the next threshold if there's another tier above it. Their year-to-date contribution keeps counting; the threshold value is what you're changing.

A user's profile holds who they are and where they work — their name, role, primary location, and license number.

See User Profile