Get Agents Their Own Commission Numbers

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Agents asking you for their commission figures don't need you at all — the report is already in their profile. Here is how to hand it over once and stop being the middleman.

Introduction

Every January, and often every month, the same request lands on an admin's desk: *can you send me my commission totals?* The fastest answer isn't to send anything. Each agent has their own report inside their own profile, covering whatever period they ask for, in either a printable summary or a spreadsheet.

What that report gives them is period totals. When they want a line per deal instead, the figures live on the transactions themselves. Between those two, an agent can answer almost any question about their own money without opening a ticket with you.

When to Use This

- An agent has asked you to send them their year-end commission total.
- You're being asked for the same figures by several agents at once and want it to stop.
- An agent needs their numbers for their own 1099 or their accountant.
- Someone asked you to email them the CDA and you're not sure whether you should.
- An agent wants a breakdown per deal, not just a period total.

Why This Beats Sending the CDA

The obvious move is to forward the CDA. It has the agent's number on it, it's already generated, and it's right there on the transaction. It's also the wrong document to hand an agent: a CDA is an admin-level disbursement instruction carrying every party's figures on that deal, and under standard permissions agents can't open one for a reason.

The agent-facing reports exist precisely so nobody has to make that call deal by deal. They show the agent their own money and nobody else's, they cover a period rather than a single transaction, and the agent pulls them without waiting on you.

1. Show the Agent Where Their Own Report Lives

It's in their personal profile, and most agents have never noticed it.

To pull it, an agent clicks their name in the upper-right corner, opens [Personal Profile], and finds **Your Commissions**. They set the period they want — a full fiscal year for tax season — choose **Summary** for a PDF or **Detail** for a spreadsheet, and download it.

Agents can pull their own commission figures without asking anyone. It sits in your personal profile, labeled Your Commissions.

See My Commissions Report

2. Send Them to the Transaction for Per-Deal Figures

Your Commissions totals a period. When an agent wants to see one specific deal — what came in, what came out, what they netted — the document for that is the **Agent Commission Statement**, downloadable from the Financial Info section of the transaction itself.

> This is the answer to *"my total looks low"*. Have them open the two or three deals in question and compare the statements against the summary; nine times out of ten it's a deal that closed just outside the period they chose.

3. Hand Out the Instructions Once

Write the two paths above into a message template and share it with the office, so any admin can send it in a couple of clicks instead of retyping it every time.

One admin can write a message once and hand it to the whole office. That's what sharing a message template does.

See Shared Templates

> Set a message to send itself later — on a date the transaction supplies, when a task gets checked off, or at a time you pick.
>
> See Message Scheduling

4. Decide What You Still Have to Send Yourself

Occasionally an agent genuinely needs something only an admin can see, and there's no self-serve route for it. In that case, download the document and email it from your own mail client as an attachment — there's no send-to-agent button inside Pipeline, by design.

Agents cannot see each other's financial figures at any permission level, so the one thing you should never do is hand over a report covering the whole office to answer one person's question.