Give Every Agent the Production Credit They Earned

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You allocate sales volume and units by hand, and they don't follow the commission dollars. That's what lets a dual-sided deal credit two sides, an assistant credit nobody, and a mentor take money without taking production.

Introduction

Two numbers on every transaction decide what your production reports say about each agent: **Sales Volume** and **Units**. Neither is calculated from the commission split. You allocate both by hand in the disbursement step, and you can point them wherever the credit actually belongs.

That independence is the whole feature. An agent can take 0% of the commission and still be credited with the volume and the unit. Two agents can share one deal and split its volume between them so the office total doesn't double. An agent who worked both sides of a sale can take two units even though the deal itself counts once. And an assistant, who neither earns nor produces, is credited with nothing at all.

When to Use This

- An agent represented both buyer and seller and their production report only shows one side.
- Two agents shared a deal and your company sales volume came out double what actually closed.
- An agent worked a deal for no commission and you still want them credited for the production.
- You've found closed transactions with volume allocated wrong and need to fix them.
- Your transaction plan usage doesn't match your unit count and you want to know why.

Why This Doesn't Change Your Bill

Offices worry that crediting an agent with two units on a dual-sided deal means paying for two transactions. It doesn't. Production credit and plan usage are separate counts entirely: the transaction is one transaction against your plan whatever you allocate inside it, and your bill never sees the units.

Which means allocating credit honestly costs nothing. Give the agent who worked both sides the two units they earned; the deal still counts once where it matters.

1. Allocate Volume and Units in the Disbursement Step

Both fields sit in the broker/agent disbursement step, beside each agent's split. Enter them per agent, deliberately.

Units are how Pipeline counts sides. The Agent Units report shows how many each agent earned and which transactions they came from.

See Agent Units

2. Credit Both Sides of a Dual-Sided Deal

When one of your agents represented both the buyer and the seller, enter their commission under both sides and allocate **1 unit per side**, so they finish with two. That's the credit they actually earned — two sides of a sale, worked by one person.

The transaction itself still counts once. Closed-transaction counts and your monthly quota are both per transaction, by design, so this changes the agent's production numbers and nothing else.

3. Split Volume Between Agents Instead of Duplicating It

Two agents on one deal, and the instinct is to give each of them the full sale price. Do that and your company sales volume doubles a deal that only happened once.

Allocate it proportionally instead — 0.5 and 0.5 on an even share, or in whatever proportion matches the split. The agents get credit, the office total stays honest.

> If your office always wants volume to follow the money, there's a company setting for it: **Use agent's commission split to calculate sales volume**, under Financial Settings, allocates volume proportionally from each agent's split from that point on. It applies going forward, not retroactively.

4. Give Production Credit With No Commission Attached

Add the agent to the transaction, enter $0 commission for them, and still allocate the sales volume and units in the disbursement step. Pipeline accepts it. That's how you credit an agent who covered a deal as a favor, or one whose money is coming from somewhere else entirely.

> Tag a user as an assistant on a transaction — they help with the file without taking sales credit or commission.
>
> See Agent Assistants

5. Fix the History That's Already Wrong

Allocation mistakes don't correct themselves, and they sit in your reports until someone goes back for them.

To repair past transactions:

1. Run **Commission & Closings** over the period to find the transactions with the wrong figures.
2. Open each one and click [Update Commissions].
3. Re-enter each agent's Sales Volume and Units in the disbursement step.
4. Click through every remaining step and save, so the CDA is rebuilt.

The close date moved, the sale price changed, or the name on a payable was wrong. Everything you entered is still there — but there's one way to reopen it that leaves you with a CDA, and one that doesn't.

See Change the Numbers After the CDA Is Generated