Pull the Numbers You Need for 1099s

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Three reports cover the three levels — every agent at once, one agent line by line, and the brokerage. Here is which to run, and what has to be true about a deal before any of them can see it.

Introduction

Year-end asks the same question at three different resolutions. Your accountant wants a total per agent. An agent wants to know how their own number was arrived at. You want the brokerage figure to reconcile everything against. Pipeline has a report for each, and they read the same underlying data, so they agree with each other as long as the underlying data is complete.

That last part is the whole job. A closed deal that's missing a close date, still sitting in an active status, or never had a CDA generated is invisible to all three reports. Not wrong, absent. Finish the transactions first and the reports take minutes.

When to Use This

- It's January and your accountant wants commission totals per agent.
- You ran a report and deals you know closed aren't on it.
- An agent is questioning their number and you need it broken out from gross down to net.
- You need the brokerage-level figure to reconcile the agent numbers against.
- You want each fee and deduction type itemised rather than lumped into one total.

Why This Isn't a 1099 Button

People come looking for a print-1099s command, and it isn't there. Pipeline doesn't produce tax forms — it produces the figures the forms are built from, which is a different job and a deliberately narrower one.

What you get instead is every number your accountant needs, at whichever level they ask for it, exportable to a spreadsheet they can work in. The reports below are what support hands people every January, and between them they cover the whole question.

1. Close Out Every Transaction First

Before you run anything, make sure each deal you expect to see is actually finished in Pipeline. Three things have to be true, and all three, or the transaction doesn't reach a commission report at all.

To make a closed deal countable:

1. Give the transaction a **Close Date**.

2. Move it into a closed or inactive status.

3. Enter its commissions and generate the CDA.

> This is the single most common reason a year-end report looks wrong. A deal that closed in November but never had commissions entered isn't a reporting bug — it's a transaction that hasn't finished yet.

2. Run Agent Production for Every Agent at Once

Start here if what you need is one file with everybody on it.

Every agent on one page: pending and closed units, sales volume, fees, deductions, and commission, all in a single download.

See Agent Production

3. Run Agent Income for One Agent, Line by Line

This is the one to run when an agent asks how their total was reached, or when you need a single person's transactions laid out end to end.

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

> Check **Include Deduction Details** before you download. Without it you get totals; with it, every fee and deduction type applied to that agent gets its own column, which is what you need when someone asks what a number was made of.

4. Run Commission & Closings for the Brokerage Level

Run this over the same period and it should reconcile against the agent-level numbers. It also takes **Include Deduction Details**, itemised per transaction rather than per agent.

The closed-business record — every closed transaction in your period, with the commission and fees your company collected and what it paid back out.

See Commission & Closings

5. Pull Referral Payouts Separately

Referral commission isn't attributed to an agent the way a split is, so it won't appear as an agent line in the reports above. Pull it at transaction level from Commission & Closings, filtered to the same period, and hand it over as its own figure.

> If your office records incoming referrals as their own transactions, labelling them makes this a one-search job every January rather than a hunt.

Your office sent a client to another brokerage and a check is coming back. Pipeline has no referral transaction type — here is the shape support builds instead, so the income lands in your reports instead of a drawer.

See Record a Referral Fee on a Deal You Weren't Part Of