Manage Commissions Workspace FAQ

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Entering commissions is admin work, it runs in order, and nothing reaches your reports until you save. Answers to the common questions about who can enter commissions, what an update does to the existing CDA, and why a closed transaction might still be missing from a report.

Who can enter commissions on a transaction?

Master admins, plus any admin given the "Enter financial data" permission for that transaction's location. The permission is set on the user's own profile, under User Permissions. A master admin has it everywhere by default.

Can agents enter their own commissions?

No — entering commissions and generating a CDA is admin-only. There's no middle tier and no per-transaction exception, because the workspace shows brokerage-level financial data for everyone on the deal. If an agent needs a figure changed, an admin makes the change.

Can agents see their own commission numbers?

Yes, and they don't need any extra permission for it. Once commissions are saved, the *Financial Info* section on the transaction shows each agent their own commission, fees, and deductions, and lets them download their own commission statement. Fees paid to the brokerage rather than to the agent stay admin-only.

What happens to the existing CDA when I update commissions?

It's removed as soon as you start the update, and replaced when you save. This is by design, not a glitch — there's only ever one current CDA on a transaction. Work through every section and click [Save Commissions] in the same pass so the transaction is never left without one.

Can I save part of a commission entry and come back to it?

Not partway through — closing the workspace mid-form discards what you typed. Enter the figures you do have, click [Calculate & Continue] to the end, and save. Everything you saved is waiting for you when you reopen it with [Update Commissions].

Why isn't my closed transaction showing up in a financial report?

Almost always because commissions were never entered on it. A transaction reaches a financial report only when three things are true: it's in a Closed status, its Close Date falls inside the period you're reporting on, and commissions have been entered with a CDA generated. Marking it Closed does none of the other two.

Do I have to retype everything just to change the close date?

No. Click [Update Commissions], then [Calculate & Continue] straight through each section without changing anything, and [Save Commissions]. Your saved figures carry through and the CDA regenerates with the current close date.

Why doesn't a contact I added later show up when I update commissions?

An update reuses what was saved last time, so it won't pick up anything added to the transaction afterward. If an escrow officer or a set of special instructions was added after the first CDA was made, type it in during the update — or delete the CDA and enter commissions fresh, which auto-fills from the transaction again.

Learn More

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

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.