Manage Commissions Workspace

Last Modified on 09/04/2026 11:17 am EDT

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.

Introduction

Every closed deal has a story in numbers: what it sold for, what the office earned, what each agent takes home, and what comes off the top before anyone gets paid. Manage Commissions is where you tell that story once, in order, and let Pipeline do the arithmetic.

You open it from inside a transaction, work through the sections in sequence, and save. Two things come out of that save. Pipeline builds the Commission Disbursement Authorization, which is the sheet your closer follows to cut the checks. And the figures you entered flow into your company's financial reports. That second half is easy to miss, and it's behind most of the blank-report questions: a transaction reaches a financial report once you've entered commissions and a CDA exists, so marking it Closed isn't enough on its own.

Give it one uninterrupted sitting where you can. The save at the end is what commits the entry, so clicking through every section is what keeps your figures, and you can come back afterward to change any of them. That's a small discipline in exchange for a real one: the deal, the document, and the reports all come from a single entry, so there's nothing left to reconcile.

How It Works

Manage Commissions is a guided form that lives on the transaction itself, moves in numbered steps, and only counts once you save.

Where It Lives

The link sits in the left menu of a transaction. It reads **[Manage Commissions]** the first time and **[Update Commissions]** once you've saved commissions, so the wording tells you whether this deal has been entered yet.

What Has to Be True Before It Appears

Two conditions gate the link. Your location's Commission & CDA Settings have to be configured, and the transaction needs at least one active in-house agent assigned who isn't marked as an assistant. Miss either one and the link isn't there.

The Sections, in Order

You move through the form one section at a time, clicking **[Calculate & Continue]** to advance. Anything already recorded on the transaction that matches a field fills itself in.

- **Escrow / Title** — the closing contact. If a contact on the transaction carries the Escrow, Title, or Settlement role, their details auto-fill.
- **Sale Info** — buyer's name, sale price, commission basis, commission, referral commission, franchise fee, and any off-the-top deductions.

- **Broker / Agent Commission Disbursement** — how the gross splits between agents, how sales volume and units are allocated, and each agent's split with the brokerage.
- **Fees & Deductions** — the broker's earnest money, client fees, and deductions, then the agent's fees, client fees, and deductions.
- **Referral Commissions** — the detail behind any referral you entered back in Sale Info.
- **Co-op Brokerage Commission & Special Instructions** — what the cooperating brokerage is owed, and the instructions printed above or below the payables on the CDA.

Saving Is What Counts

Pipeline records nothing until you click **[Save Commissions]** at the end. Leaving the workspace partway through discards what you typed, so plan to finish in one pass. Only have some of the figures? Enter what you have, click through to the end, and save — you can reopen it later and everything you saved is still there.

What You Get Back

Saving produces the CDA, which lands in the transaction's Financial Docs section and stays restricted to admins with financial permission. A *Financial Info* section also appears on the transaction. Admins with financial permission see the brokerage's share there; agents see only their own numbers and can download their own commission statement.

Who Can Do It

Master admins have it account-wide. Any other admin needs the **Enter financial data** permission for that transaction's location, set on their user profile under User Permissions. Agents can't enter or update commissions at all, and there's no middle tier — the workspace exposes brokerage-level financial data, so access to it is deliberately narrow.

Enter Commissions on a Transaction

> Work through the Manage Commissions form section by section, then save to generate the CDA and feed your financial reports.

> **Who Can Do This**: Master admins, and admins with the "Enter financial data" permission for the transaction's location.

To enter commissions on a transaction:

1. Open the transaction and click [Manage Commissions] in the left menu.

2. Enter the transaction's commission information in the first section, then click [Calculate & Continue] to move to the next. Anything already on the transaction that matches a field fills itself in.

3. Continue through each remaining section the same way. Some fields can be left blank; others need a `0` when they don't apply to this deal.

4. At the end, click [Save Commissions].

Pipeline generates the CDA and adds it to the transaction's Financial Docs section, the *Financial Info* section appears on the transaction, and the figures you entered start counting toward your financial reports.

Update Commissions on a Transaction

> Reopen a saved entry to correct a figure. Starting an update removes the existing CDA, so finish and save in the same pass — a new CDA replaces the old one when you do.

> **Who Can Do This**: Master admins, and admins with the "Enter financial data" permission for the transaction's location.

To update commissions on a transaction:

1. Open the transaction and click [Update Commissions] in the left menu.

2. Click [Calculate & Continue] until you reach the section you need to change. Everything you saved before is already filled in.

3. Correct the figures in that section.

4. Click [Calculate & Continue] through the remaining sections, then click [Save Commissions].

A new CDA replaces the previous one in Financial Docs, and your financial reports pick up the corrected numbers. If you leave before saving, the transaction has no CDA and drops out of those reports until you enter commissions again.

Put an Agent on the Transaction First

The workspace won't open on a deal with nobody on it, and the agent has to be one of your own and active — not somebody flagged as an assistant, and not the co-op agent from the other brokerage.

Put the right agents on each side of a transaction so Pipeline credits the deal correctly and everyone can open the file and work it.

See Assign Agents

Manage Commissions Workspace FAQ

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.

See Manage Commissions Workspace FAQ

Manage Commissions Workspace Troubleshooting

Can't get into the workspace, or can't get through it? Start here.

- Why Can't I Enter Commissions on a Transaction?