Pay a Transaction Coordinator Through the CDA

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Your coordinator works the file and gets paid at closing, and neither of those should put them in your production reports. Two settings do it: assistant for the access, a deduction for the money.

Introduction

A transaction coordinator sits in an awkward place. They need to be on the transaction: opening documents, working the checklist, chasing signatures. But they didn't sell anything, so they shouldn't appear anywhere near your sales credit. And they're owed a fee at closing, which the simplest arrangement has escrow paying directly rather than routing through the office.

Pipeline separates those two needs cleanly. Access comes from tagging them as an assistant, which lets them work the file while taking neither commission nor sales credit. Payment comes from a deduction, which puts their fee on the CDA as its own payable line so your closing agent pays them straight out of the disbursement.

When to Use This

- Your TC is paid per file and you want escrow to pay them at closing.
- You added the coordinator as an agent and now they're showing up in production reports.
- Your agents pay their own TC and you want the fee taken from the agent's side, not the office's.
- The coordinator is an outside contractor rather than someone on your roster.
- The client is paying the coordination fee and you're not sure where it goes.

1. Put Them on the Transaction as an Assistant

Not as an agent. An assistant can work the file completely and still stays out of commission reports and sales credit, which is exactly the shape a coordinator needs.

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

See [Agent Assistants]

> If they were already added as an agent, switch them to assistant and run Update Commissions on the transaction so the CDA is rebuilt without them on it.

> Setting up their account access — which locations they reach, which permissions they carry — is a separate piece of work with its own article.
>
> Decide exactly what each person can see and do in Pipeline, location by location.
>
> A TC touches every file in your office but shouldn't own any of them. Three setups, and the one you pick

decides what they see.

See Set Up a Transaction Coordinator With the Right Access

2. Create a TC Fee Deduction Type

A master admin creates it once under Admin / Settings → Deductions. Name it for what it is — *TC Fee*, *Coordination Fee* — and it's available on every transaction from then on.

Deductions come out of the brokerage's share or an agent's share of a commission and get paid to someone else — an in-house teammate or an outside company.

See Deductions

3. Apply It Against Whoever Is Paying

In the fees and deductions step, apply the TC Fee under the party who bears it — the brokerage if the office pays for coordination, the agent if your agents cover their own. Name the coordinator as the recipient if they're on your roster, or enter the outside company in the **Payable to** line if they're a contractor.

Either way the fee lands on the CDA as its own payable, and escrow pays them directly out of the closing.

A home warranty, a contractor, a commission advance, a credit back to the buyer — money the agent owes someone else, taken after the split so the brokerage's share never moves.

See Pay a Third Party Out of an Agent's Commission

4. Use a Different Route When the Split Is Wrong for It

Two situations don't fit a straightforward deduction, and both have their own mechanism.

- **The fee comes out before anyone splits anything.** Use an off-the-top deduction, so the coordination cost is removed from the gross and the brokerage and agent divide what's left.
- **The client is paying it.** That's a client fee, collected from the buyer or seller at closing — and it's also the only route that works when there's no commission on the deal for a deduction to come out of.

Take an amount out of the gross commission before Pipeline calculates anyone's split, so the figure the brokerage and its agents divide is already net of it.

See Off-the-Top