Commission Summary Fields FAQ

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The Commission Summary box travels with the transaction and locks when the deal closes. Answers to the common questions about who can edit it, when it stops accepting changes, and the settings that shape the figures around it.

Do I need to turn the Commission Summary field on?

No. It's on the Add and Edit Transaction pages for every account already, with or without the Commission Module. There's nothing to activate.

Can I pre-fill it with a template?

Yes — set a default value in your company settings. Offices that want consistent commission notes drop labelled prompts in as the default, so every new transaction opens with the questions already asked.

Pre-fill the More Info, Admin Info, and Commission Summary fields on every new transaction so nothing important gets forgotten.

See [Default Field Values]

Why can't an agent edit the Commission Summary after a transaction closes?

It locks on purpose. Once the transaction reaches a Closed status or a CDA has been generated, the field is read-only so the written record can't drift from the disbursement that went out. No permission unlocks it — an agent who needs a change can email an admin from inside the transaction.

Why can't an agent see the box on a Referral transaction?

Agents can only edit commission details in the Active, Listing, and Pending status categories.If your Referral status sits in the *Other* category, it falls outside that. Some offices handle it with a Referral transaction label instead of a separate status, which keeps the deal in a category the reports and the field both work with.

Is what an agent types here the same as managing commissions?

No — they're two different things. The Commission Summary is reference text that travels with the transaction. Managing commissions is the admin-side process that calculates the split, produces the CDA, and feeds every financial report. Nothing typed in the summary reaches those numbers.

Why is an agent's sales volume double what it should be?

Almost always the sales volume that was allocated when commissions were entered. With *use agent's commission split to calculate sales volume* switched off, each agent on a side is credited the full sale price, so a two-agent deal reports twice the volume. Turn the setting on for deals going forward, and correct an existing one by reopening the transaction and updating each agent's sales volume where the commissions were entered.

What does "use start dates of agents to determine fiscal years" change?

The twelve months that year-to-date figures are measured over. Unchecked, year-to-date means the calendar year. Checked, each agent's year runs from their own start-date anniversary — so their cap resets on the day they joined rather than on January 1. The agent's User Start Date has to be filled in on their profile for it to take effect.

Does Payable LLC or Corp change how an agent appears in reports?

No — it only changes the CDA. The name you enter is who the check is written to on the disbursement. Inside Pipeline, the agent still shows up under their first and last name everywhere reports are concerned.

Why does the CDA show the broker's personal name instead of the company?

Something is in the Broker Name for Commission Disbursement field. That field overrides your Company Name on the brokerage's payable line, so a name entered there once keeps printing. Clear it to fall back to the Company Name, or correct it, then regenerate any CDA that already went out with the wrong name.

Learn More

The Commission Summary box on a transaction is where the person who knows the deal writes down how the commission should be split.

See Commission Summary Fields

Still Have Questions?

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