Commission Summary Fields

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

Introduction

The agent who negotiated it isn't the person entering the money a week later. Somewhere between those two, a referral coming off the top, or a fee the seller agreed to cover, goes missing, and it surfaces as a correction after the disbursement has already gone to title.

The Commission Summary box is where that gets written down. It sits on the transaction next to More Info and Admin Info, and it's free text on purpose, because the thing worth saying about a commission is rarely a number in a field. It's notes, not math. Nothing typed there moves a figure in a report or on a CDA. What it does is carry the terms of the deal from the person who knows them to the person entering them.

Fill it in while the deal is live and your admin has the whole story at entry, with no email thread to reconstruct. The field does lock once the transaction closes or a CDA exists, and that's deliberate rather than a glitch: from that point the written record has to match the disbursement that went out. Below the box sit the company settings that do the arithmetic the box doesn't.

How It Works

One field on the transaction, three settings on your company, and one field on each agent's profile.

Where the Field Lives

Commission Summary is on the Add Transaction and Edit Transaction pages, near More Info and Admin Info. It's on every account whether or not you have the Commission Module, and there's nothing to switch on.

Who Can Fill It In

Anyone who can edit the transaction, agents included — which is the point of it. Agents can edit it while the transaction sits in an Active, Listing, or Pending status. If your office uses a custom status that falls under the *Other* category, agents won't be able to edit commission details on those transactions.

When It Locks

The field closes once the transaction reaches a Closed status or a CDA exists for it, whichever comes first. That's deliberate — it keeps the written record consistent with the disbursement that went out — and no permission unlocks it. An agent who needs a change after that point can email an admin straight from the transaction.

Notes, Not Numbers

What goes in the Commission Summary is reference text. It doesn't feed your financial reports and it isn't what the CDA calculates from. Managing commissions on the transaction is the admin-side job that produces the figures, the CDA, and everything the reports read.

A Starting Template for Everyone

Want agents to fill this in consistently? Drop a company-wide template into the field so every new transaction opens with the prompts you care about.

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

See Default Field Values

The Settings Behind the Figures

Three company settings and one field on each agent's profile decide what the commission figures around the summary come out as: the twelve months year-to-date covers, how Pipeline divides sales volume when a deal has two of your agents on it, and the names your CDA pays. All four are covered below.

Add Commission Details to a Transaction

> Write down the split, the referral, or the fee while it's fresh, so whoever enters commissions isn't guessing.

> **Who Can Do This**: Anyone who can edit the transaction, including agents, while it's in an Active, Listing, or Pending status.

To add commission details to a transaction:

1. Open the transaction and click [Edit Transaction] on the left menu.
2. Scroll to the **Commission Summary** box.
3. Type the commission details.
4. Click [Save Transaction].

The notes stay with the transaction and are visible to everyone who can see it, right up until the deal closes or a CDA exists.

Set Up Your Commission Company Settings

> Three account-wide settings decide how Pipeline measures a year, splits sales volume, and names your brokerage on a CDA.

> **Who Can Do This**: Master admins.

To set up your commission company settings:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. From the left menu, click [Company Settings].

2. Under **Financial Settings**, complete the settings that fit your office (outlined below), then save.

Use Start Dates of Agents to Determine Fiscal Years

Leave this unchecked and year-to-date figures run on the calendar year, January through December. Check it and each agent's year runs from their own start-date anniversary instead — which is how most offices track a cap. It only works if the agent's **User Start Date** is filled in on their profile, so set that first.

Use Agent's Commission Split to Calculate Sales Volume

Check this and Pipeline divides sales volume between agents in proportion to their share of the commission — two agents splitting a $600,000 sale 50/50 are credited $300,000 each, and the company's volume reflects the $600,000 that actually sold. Leave it unchecked and Pipeline credits each agent on a side with the full sale price, so the same deal reports $1,200,000 of company volume. Most offices check it; the ones that don't are usually crediting each agent in full on purpose.

Broker Name for Commission Disbursement

Leave this blank and the brokerage's payable line on the CDA uses your **Company Name**. Enter something and it overrides the company name — which is what you want if the brokerage's share is payable to a different legal entity, and which is also why a personal name occasionally turns up on a CDA nobody meant to sign it that way.

Save, and the settings apply to commissions entered from that point on. One more setting sits on this page, under *Email Settings*, if you'd like your agents to get their own numbers automatically each month.

Once a month, each agent gets their own numbers by email — last month's production plus the year to date, with nobody having to run a report.

See Monthly Production Summary

Set an Agent's Payable Name

> Paid to an LLC or a corporation rather than their own name? Set it once on the agent's profile and every CDA follows.

> **Who Can Do This**: Master admins.

To set an agent's payable name:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings], then [Manage Users].

2. Click the agent's name to open their profile.

3. Scroll to the **Commission Percent** section, clicking [+] to expand it if needed.

4. Enter the name in **Payable LLC or Corp**.

5. Click [Update User].

Pipeline now makes CDAs for that agent payable to that name. It changes the CDA only — inside Pipeline, the agent still appears under their first and last name everywhere reports are concerned. Leave the field blank and Pipeline uses their own name.

Commission Summary Fields FAQ

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.

See Commission Summary Fields FAQ