Get Agents to Hand You the Commission Details

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Commission entry stalls when the admin has to chase the agent for the numbers. Prompt for them where the agent already works, and the details arrive with the deal.

Introduction

Somebody knows how the commission on a deal is meant to work, and it usually isn't the person entering it. The agent negotiated it: the split, the referral, the concession, the fee somebody agreed to cover. The admin opening Manage Commissions two weeks later is reconstructing it from memory and email.

The Commission Summary field on the transaction exists to close that gap. Whatever the agent writes there shows up beside the admin during commission entry and travels through to the agent's own commission statement. The trick is getting it filled in reliably, and that's what a default value and a checklist task are for: one prompts, the other chases.

When to Use This

- You're emailing agents for commission details on nearly every closing.
- Commission entry is stalling because nobody knows what was agreed.
- Different agents send you the details in different shapes.
- You want a record of who was paying what, written by the person who negotiated it.
- You need somewhere to note pre-listing expenses or an advance against a deal.

Why This Beats Asking

The obvious fix is a better email — a clearer request, sent earlier, to the agent who keeps forgetting. It works on the agent who was going to answer anyway.

A default value works differently: the agent doesn't have to remember anything, because the prompt is already sitting in the field when they open the transaction, phrased as the question you want answered. You're not asking them to recall a process; you're showing them a blank to fill in, at the moment they still remember the deal. That's the whole difference, and it's why this stops being a chase.

1. Put the Prompt in the Field by Default

Set a company-wide default value on the Commission Summary field, and every new transaction opens with your prompt already in it. Write it as the form you want back — *Realtor Commission paid by: [Buyer / Seller]*, *Referral: yes / no, to whom, how much*, *Concessions or credits:* — so the agent is filling in blanks rather than composing.

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 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

2. Add a Task That Chases It

A prompt isn't a deadline. Put a **Complete Commission Summary** task on the checklist templates where it belongs, with a relative due date tied to contract or closing, and the agent gets it on their task list and in their reminder emails like any other outstanding item.

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates

3. Read It While You Enter Commissions

Whatever's in the field appears in the Commission Module's left menu as reference while you work, so you're reading the agent's own account of the deal rather than switching to your inbox to find it. It also carries through to the agent's commission statement, which makes it a shared record rather than an internal note.

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

> The field locks when the deal closes, so what it says is what was agreed rather than what someone decided afterwards.

4. Use the Same Field for Expenses and Advances

Pipeline has no expense module, and this field is where offices put what would go in one. Pre-listing costs — photography, cleaning, staging — an advance against the agent's commission, anything the deal needs to account for that has no field of its own.

Recording it here means it's in front of you at commission entry, which is when you'd need to recover it — as a client fee collected from the client, or a deduction from the agent's share.

A buyer or seller owes your office something that isn't commission — a broker fee, a retainer, a reimbursement, a tax. Client Fees is the one mechanism that collects it at closing, and it works even when the commission is zero.

See Collect a Fee From the Buyer or Seller