Turning On Commissions

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Commissions are an add-on you switch on for the account, and the settings behind them are made per office. Once it is on, your offices do the entering.

Introduction

Switching the module on is a master admin's action, and the first thirty days are free. What follows it is configuration rather than data entry.

The settings decide whose signature signs the disbursement document, who gets paid directly, and what your title company reads. They are per office, so several brokers under one account each get their own.

1. Switch the Module On

It turns on from inside the account without a call. Worth doing before your agents start producing, so the year's numbers are complete from the start.

Ready to run commissions out of Pipeline? A master admin can switch the Commission Module on from inside your account, and the first 30 days are free.

See Commission Module Activation

2. Set Each Office's CDA Rules

Signature, payees, and the instructions your title company reads, set per Location. Offices with different brokers each need their own pass through this.

Set up Commission & CDA Settings for each of your offices to decide who gets paid directly, whose signature signs the CDA, and what instructions your title company reads.

See Commission & CDA Settings

3. Set Each Agent's Share

Enter the agent's percent once and Pipeline fills it in every time you enter commissions on one of their deals. It does not change on its own.

Set an agent's share once and Pipeline fills it in every time you enter commissions on one of their transactions.

See Commission Percent

4. Track Agents Toward Their Next Tier

Agents who move up a split after producing enough for the brokerage are tracked automatically, and Pipeline warns you on the transaction that takes them over.

Agents who move up a tier after generating enough for the brokerage get tracked automatically, and Pipeline warns you on the transaction that takes them over.

See Split Thresholds

5. Set Up What Agents Pay the Brokerage

Office admin, E&O, B&O tax: set the fees once and they are ready on every transaction, in dollars or as a percent.

Agent fees are what an agent pays the brokerage out of their own share of a commission: office admin, E&O, B&O tax. Set them up once and they're ready on every transaction.

See Agent Fees

6. Set Up What Comes Out for Someone Else

A deduction comes out of the brokerage's share or an agent's and is paid to someone else, an in-house teammate or an outside company, and it reads that way on the CDA.

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

7. Say How a Split Gets Written Down

The summary box is where the person who knows the deal records how it should be split, so the shape of that box decides what they are able to tell you.

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

8. Keep the CDA and the Deal Agreeing

Generating a CDA locks the numbers behind it. Expect your agents to notice, since it is also the moment their own edits to those figures stop.

Generating a CDA locks the numbers behind it, so the transaction and the disbursement document can never quietly disagree.

See CDA Lock