Manage Commissions

SUMMARY

The Manage Commission disbursement authorization page serves two purposes:

1. It allows you to generate a PDF that contains instructions to the closer on how transaction commissions should be disbursed.

2. The numbers you enter on the commission disbursement authorization page are used to power your company's financial reports.

Manage Commissions is only available to offices subscribed to the Commission ModuleLearn How to Activate this Module on your Pipeline Account \rightarrow

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FIELD DEFINITIONS

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Manage/Update Commissions

1 Go to the transaction and click [Manage Commissions] or [Update Commissions]from the left menu.



2 On the Manage Commissions page, enter the transaction's commission information in each section then click [Calculate & Continue] to proceed to the next step.

Any information that is already available in the transaction that matches what's needed will auto populate.

3 At the end, click [Save Commissions].

Commission Disbursement Authorization

After the Commission Disbursement Authorization (CDA) is generated in Manage Commissions, the CDA document will be added to the Financial Docs section.

The CDA doc is only visible to admins that have permission to, "View financial reports (adminlevel permission)" in the transaction's location.

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4	Edit Transaction	Email docs and notes to this transaction: 5526–150242–TX-4400511@docs.paperlesspipeline.com 🖪								
	Upload Docs			countribut						
	Assign Docs	Label: Residential - Single Family Status: Pending	Listed On: Ju	n 7, 2021						
2	New Offer	Side: Listing & Buying	Closes On: Ju	n 18, 2021						
5	Transaction History	Location: CA								
	Received Emails (0)	Buyer: Bob Buyer								
	Download Transaction	Sale Price: \$100.000	Total Commissio	n: \$10.000						
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Che	cklists 4/17 🂠 🕂	More Info								
-ке	ey Dates of Importance During Escrow Period	Buyer Signing- Pending Seller Signing- Y								
	Verification of Funds for Downpayment Due 6/14	• Seller Signing- 1								
	Send Initial Deposit to Escrow 6/14	A IMPORTANT WARNINGS								
	Buyer to Arrange Homeowner's Insurance for 7/2 Pronerty	DO NOT PROCEED UNTIL BUYER SIGNS ADDENDUM.								
	All Inspection Contingencies Removed 7/2	MIMPORTANT COMMUNICATION								
	Increased Deposit Due 7/2	Call with Seller, 12/9/20, made agreement.								
	Seller signs Escrow Papers									
	Client to Set up Transfer of Utilities	×MORE INFO								
	Buyers sign Escrow Papers/Loan Docs	Plan- 3/2 County- Shelby								
	Balance of Funds Due in Escrow @monta	,								
	Close of Escrow	+ Financial Info download								
Ť	Add doc name or task	Listing Agents ()								
		Orange Edwards	Mollis+orange@paperlesspipeline.com	1110001111						
+ Pe	nding – Buying 🥥	Charles Leifer	charles@paperlesspipeline.com	7858408853						
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		Document Name		Added On A Review A Entered						
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		Commission Disbursement Authorization		6 hrs ago a						
Γ.										

Financial Info

After the Commission Disbursement Authorization (CDA) is generated in Manage Commissions the Financial Info section will appear on the transaction.

Admins that have permission to, "View financial reports (admin-level permission)," in the transaction's location will see the brokerage's share of the commission while agents will only be able to see their own commission numbers and download their own commission statement.

- Financial Info download]		
Sale Price:	\$500,000.00	Broker's Net Commission:	\$5,850.00
Gross Commission:	\$30,000.00	Special Franchise Fee Owed:	\$750.00
Referral Commission:	\$3,750.00	Agent bonus:	-\$500.00
Michael Angeletti do	wnload In-house referral	Michael Angelettigroup downloa	Listing and Selling Agent
Commission Split:	80%	Listing Commission:	\$5,625.00
Gross Commission:	\$3,000.00	Listing Agent / Broker Split:	80% / 20%
Net Commission:	\$3,000.00	Selling Commission:	\$14,250.00
Home warranty:	-\$50.00	Selling Agent / Broker Split:	80% / 20%
Net Payable:	\$2,950.00	Gross Commission:	\$15,900.00
		Net Payable:	\$15,900.00

Here's how to Download an Agent Commission Statement \rightarrow

Reports

Commission numbers entered in Manage Commissions are added to your company's financial reports.

Learn more about Commission Module Reports →

To find transactions where commissions have or haven't been entered, you can use the advanced search options to search by "Commissions Entered" or "Commissions Not Entered."

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All Contacts	456 Second St				L Mobile Horn	Acti	ve	0/21	1.	Old Pine		

Learn how to Advanced Search for Transactions \rightarrow

FAQ (Frequently Asked Questions)

Q: Why am I not seeing the option to [Manage Commissions] on transactions?

A: To Manage Commissions on a transaction, the location's Commission & CDA Settings must be configured and an in-house agent (that is not an assistant) must be assigned to the transaction. Confirm the Commission & CDA Settings have been configured for the transaction's location and that an in-house agent (that is not an assistant) is assigned.

Learn how to Configure Commission & CDA Settings \rightarrow

Escrow / Title

If a contact has been added to the transaction with the role Escrow, Title, or Settlement, that person's contact information will auto populate in the Escrow / Title field. Otherwise, enter the Escrow / Title contact.

Escrow / Title									
Escrow / Title Role		Company / Address	Name		Phone	Fax	Email		
Escrow	1	Fleming Escrow	Monta Fleming	*	515-380-2122	515-218-3293	monta@flemingescrow.c		

Sale Info

Buyer's Name

If a Buyer's Name has been added to the transaction, the Buyer's Name will auto populate in the Buyer's Name field. Otherwise, enter the Buyer's Name.

Sale Price

If the Sale Price has been added to the transaction, the Sale Price will auto populate in the Sale Price field. Otherwise, enter the Sale Price.

Commission Basis

By default, the Commission Basis is set to Sale Price.

If commission calculations are not based on the normal Sale Price, you can choose a different Commission Basis option from the list of your company's custom Commission Bases. Then, you will be asked to enter the basis amount on which commission should be calculated.

Learn how to Create and Use Commission Basis →

Commission

In the Commission field, enter commission due as a percentage of the Sale Price or a flat dollar amount.

If the transaction is dual-sided, enter commission due for both the Listing and Selling side.

Referral Commission

If a referral is being paid on the transaction, in the Referral Commission field, enter any referral commission due as percentage of the gross commission or a flat dollar amount.

If the referral is being paid to an in-house agent, check the box for, "This is an in-house referral."

Franchise Fee

If your office pays a franchise or corporate fee per transaction, the Franchise Fee will be set as the default amount entered in the location's Commission & CDA Settings. The Franchise Fee can be taken as a percentage of the gross commission or as a flat dollar amount. If needed, you can update the Franchise Fee to a different amount.

Off-the-Top Deductions

If your office has setup and enabled Off-the-top (OTT) deductions, OTT deductions can be paid to the broker, in-house agents or third parties (e.g. Charitable Contribution, Client Rebate, Home Warranty, Payment to Assistant or TC, etc.).

Learn how to Set Up, Enable & Apply off-the-Top Deductions →

Broker / Agent Commission Disbursement

Distribute Gross Between Agents (if applicable)

If there is more than one agent on the transaction, enter each agent's commission amount as a percentage of the gross commission or a flat dollar amount.

Allocate Sales Volume and Units

Sales Volume

By default, the system will allocate the transaction's Sale Price as Sales Volume for all agents. If needed, you can update the Sales Volume to a different amount.

When there are multiple agents on the transaction, if Sales Volume should be allocated to match the agents' split of commission instead, enable that option from the Company Settings page.

Learn how to Use Agent's Commission Split to Calculate Sales Volume →

Units

By default, when there is one agent on the transaction's side, the agent will be granted 1 unit. If needed, you can update the agent's unit to a different amount.

When there are multiple agents on the Listing or Selling side, units will be automatically allocated based on the percentage of gross distributed to the agent. If the gross was distributed between agents as a dollar amount, you'll need to manually enter the agent's unit.

Specify Agent / Broker Splits

Enter the agent(s) commission split amount as a percentage or dollar amount.

If agent's commission split is normally a set amount, add their commission split to their User Profile to automatically apply it when managing commissions.

Learn how to Add Agent Commission Splits →

If agent's commission split should be increased when they reach a certain threshold, set commission split thresholds for agents and be warned when they are about to surpass their thresholds.

Learn how to get Assistance with Multi-tier Commission Splits →

Fees & Deductions

Broker's Fees & Deductions

Earnest Money Deposit

Enter the amount that was collected as an earnest money / trust deposit.

This amount will be deducted from the final amount that escrow is instructed to pay your brokerage. If the amount is greater than or equal to the broker's net payable, no payable amount will be included for the brokerage in the CDA.

Client Fees Paid to Broker

Client fees are fees paid by buyers or sellers outside of normal commissions to the brokerage or agents.

Learn how to Setup & Apply Client Fees →

Broker Deductions

Deductions can be paid by the broker to in-house agents or third parties.

Learn how to Setup & Apply Deductions →

Agent Fees & Deductions

Agent Fees

Agent fees are fees paid to the brokerage from an agent's commission.

Learn how to Setup & Apply Agent Fees →

Client Fees

Client fees are fees paid by buyers or sellers outside of normal commissions to the brokerage or agents.

Learn how to Setup & Apply Client Fees →

Agent Deductions

Deductions can be paid by the agent to in-house agents or third parties.

Learn how to Setup & Apply Deductions →

Referral Commissions (if applicable)

If Referral Commission was entered in the Sale Info step, enter the Referral Commission details.

For in-house referrals, search for and select the agent's name, enter the agent's share of referral

commission as a percentage or flat dollar amount, and take any necessary fees or deductions.

Learn how to Track Referral Commission Paid to Other Brokerages \rightarrow

Co-op Brokerage Commission & Special Instructions

Cooperating Brokerage

If desired, enter the amount to be paid to the cooperating brokerage, their company name, and any additional info.

CDA Instructions

If the default value has been set for CDA instructions, the CDA instructions will auto-populate. Otherwise, enter CDA instructions to be shown above or below payables.

Learn how to Format CDA Special Instructions →