Track Referral Commissions Paid to Other Brokerages

SUMMARY

Track and designate outside referral commission inside of Pipeline's Manage Commissions page.

As at 4/2/17, the "Generate CDA" option has been renamed to Manage/Update Commissions

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- 1. Entering Referral Commissions
- 2. Reporting Referral Commissions

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Entering Referral Commissions

To enter information about referral commissions:

1 From any transaction, access the Manage/Update Commissions page from the left hand menu. Once on this page, any information from the transaction will auto-populate in step 1 and step 2.



- 2 Enter the commission percentage (%) or fixed dollar amount (\$) that is going to be paid to the brokerage.
- 3 Enter the outside referral that needs to be paid by entering a percentage (%) or fixed dollar amount (\$) in the Referral Commission box.



4 Calculate the commission, then move on to the next step to distribute the commission between the brokerage and the agent as well as charge any additional fees and deductions.

Distribute Listing Commis	ssion:		\$118,190.00
Allocate sales volume and u	units	·	
		Sales Volume	Unit
Dante Nukuhiva		\$197000	1
2 Specify agent / brokerage s	plits		
	Brokerage	Agent	
Dante Nukuhiva	%	%	* % \$
		Calcu	late & Contin

- 5 Calculate the commission then move on to the next step to track the referral commission. Set the number of referrers. If there is more than one referrer, you can select how many there are and distribute the commission by percent or dollar amount.
- 6 Enter the name and address for each referring company.

Referral Commissions		
Wil	How many referrers will share the commission amount? 2	
Referral Commiss	ion 1	
Company	Company *	
Address	Address *	
	Referral Commission Split (% of \$11,820.00): 50% *	
Referral Commiss	ion 2	
Company	Company *	
Address	Address *	
	Referral Commission Split (% of \$11,820.00): 50% *	
	Calculate & Continue	

7 Calculate the commission. Paperless Pipeline will generate a complete breakdown of all the information entered including the referral.

Broker / Agent / Referral Commission Disbursement			
Sale price	\$197,000.00		
Gross commission	\$118,200.00		
Referral gross commission	\$11,820.00		
Net (gross – referral)	\$106,380.00		
Franchise Fee	\$10.00		
Net distributable	\$106,370.00		
Commission to Coffee is for Closers Realty			
Gross commission	\$63,822.00		
Franchise Fee	\$10.00		
Total fees + taxes charged to agent	\$0.00		
Net payable	\$63,832.00		
Commission to Dante Nukuhiva (listing agent)			
Gross commission	\$42,548.00		
Net fees + taxes deducted	\$0.00		
Net payable	\$42,548.00		
Referral commission payable to Company A (50% of \$11,820.00)	\$5,910.00		
Referral commission payable to Company B (50% of \$11,820.00)	\$5,910.00		
Next, you can specify how much commission the co-operating brokerage should be paid and add special instructions.			

To learn more about setting up and specifying Agent fees, seeSet Up Agent Fees \rightarrow To tearn more about specifying deductions, seeSet Up Deduction Types \rightarrow

Reporting Referral Commissions

Referral commission amounts paid to outside brokerages are tracked in the "Referral Commission" column within the following Commission Module reports:

- Aggregate Performance \rightarrow
- Commission and Closings \rightarrow
- Pending Commissions →
- Agent Income →

To download any of these reports:

1 Click Reports from the top menu.



2 Click on your desired report from the left menu.

O Commission Summary Pending O Pending O Pending O Pending	inancials	January 2019		December 2018		2019 Total		2018	3 Total
Coss 30 Gross 30 Gross 50 Gross 50 Gross 60 Gross 60	Commission Summary	Pending	0	Pending	0	Pending	0	Pending	
Referral 50 Referral 50 Referral 50 Referral 50 Referral 50 Broker 50 Broker 50 Broker 50 Broker 50 Broker 50 Broker 50 Agents 50 <		Gross	\$0	Gross	\$0	Gross	\$0	Gross	
Commission & Closings Broker 50 Agents 50 Agent Fees 51,50,50 Gross \$35,70,00 Gross \$35,70,00 Gross \$35,70,00 Referral \$30,80 Referral \$31,86,51 \$31,86,51 Broker \$56,31 Broker \$56,31 Broker \$56,31 Broker \$56,31 Broker \$56,31 Broker \$56,71 Broker \$56,71 Broker \$56,71 Broker \$56,71 Broker \$56,71 Broker \$56,71 Broker	Re Aggregate renormance	Referral	\$0	Referral	\$0	Referral	\$0	Referral	
Pending Commissions Agents 50 Agents 535,700.00 Cross 535,700.00 Cross 535,700.00 Rors 535,700.00 Rors 535,700.00 Rors 536,700.00 Agents 536,700	Commission & Closings	Broker	\$0	Broker	\$0	Broker	\$0	Broker	
Agent Income Agent Fees S0 Agent Fees S0 Agent Fees Agent Fees Agent Commissions Income Income Income Income Income Agent Units Closed 1 Closed 1 Closed Income Agent Production Gross 555,000.00 Gross S54,000.00 Gross S15,670.00 Broker S15,670.00 Broker S60,91.30 Agent Fees S0.00 Agent S Agent S S28,716.20 Agents S28,716.20 Agents S28,716.20 Agent S S28,716.20 Agent S S0.00 Agent Fees S0.	Pending Commissions	Agents	\$0	Agents	\$0	Agents	\$0	Agents	
Agent Commissions Closed 1 Closed 2 Closed 1 Closed 2 Closed 1 Closed 2 Closed Closed 2 Closed <td>👗 Agent Income</td> <td>Agent Fees</td> <td>\$0</td> <td>Agent Fees</td> <td>\$0</td> <td>Agent Fees</td> <td>\$0</td> <td>Agent Fees</td> <td></td>	👗 Agent Income	Agent Fees	\$0	Agent Fees	\$0	Agent Fees	\$0	Agent Fees	
Agent Units Closed Closed <thclosed< th=""> <thclosed< th=""> Closed<td>😨 Agent Commissions 🔰</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></thclosed<></thclosed<>	😨 Agent Commissions 🔰								
Agent Production Gross \$35,700.00 Gross \$54,000.00 Gross \$35,700.00 Gross \$135,700.00 Referral \$50.00 \$60.00 \$50.00 \$60.00 \$50.00 \$60.00 \$50.00 \$60.00 \$60.00 \$60.00 \$60.00 \$60.00 <td>Agent Units</td> <td>Closed</td> <td>1</td> <td>Closed</td> <td>2</td> <td>Closed</td> <td>1</td> <td>Closed</td> <td></td>	Agent Units	Closed	1	Closed	2	Closed	1	Closed	
Referral S0.00 Agents S2.87.16.0 Agents S2.87.16.0 Agents S2.87.16.0 Agents S2.87.16.0 Agents S0.00 S0.00 <	R Agent Production	Gross	\$35,700.00	Gross	\$54,000.00	Gross	\$35,700.00	Gross	\$1,156,350
Broker \$6,091.30 Broker \$15,679.00 Broker \$6,091.30 Broker \$663.1 Agents \$28,716.20 Agents \$37,376.00 Agents \$28,716.20 Agents \$471.6 Agent Fees \$0.00 Agent Fees \$90.500 Agent Fees \$0.00 Agent Fees \$6,71.20 Usage by Agent Transaction Reports With Incomplete Checklists Verture Closing Verture Closi	P Lead Sources	Referral	\$0.00	Referral	\$0.00	Referral	\$0.00	Referral	\$3,41
Agents S28,716.20 Agents S37,375.00 Agents S28,716.20 Agents S471.6 Agent Fees S0.00 Agent Fees S00.00 Agent Fees S0.00 Agent Fees		Broker	\$6,091.30	Broker	\$15,679.00	Broker	\$6,091.30	Broker	\$663,12
Agent Fees \$0.00 Agent Fees \$905.00 Agent Fees \$0.00 Agent Fees \$6,7 Usage by Agent With Incomplete Checklists Overdue Closing Closing in 30 days Expiring in 14 days Verture Ve	count Stats	Agents	\$28,716.20	Agents	\$37,376.00	Agents	\$28,716.20	Agents	\$471,668
I Total Usage I Usage by Agent Transaction Reports With Incomplete Checklists Overdue Closing Closing in 30 days Expiring in 14 days		Agent Fees	\$0.00	Agent Fees	\$905.00	Agent Fees	\$0.00	Agent Fees	\$6,740
Usage by Agent Transaction Reports With Incomplete Checklists Overdue Closing Closing in 30 days Expiring in 14 days	l Total Usage								
Transaction Reports With Incomplete Checklists Overdue Closing Closing in 30 days Expiring in 14 days	Usage by Agent								
 With Incomplete Checklists Overdue Closing Closing in 30 days Expiring in 14 days 	Transaction Reports								
Vorrdue Closing Closing Closing in 30 days Expiring in 14 days	With Incomplete Checklists								
Closing in 30 days Cosing in 14 days									
Closing in 30 days Second	Overdue Closing								
Expiring in 14 days	Closing in 30 days								
	😫 Expiring in 14 days								
Recent status changes	Recent status changes								
	Added in January								

3 Select or enter the desired filters.

4 Click [Download Report] to download the report to your computer.

ocation		
Company-wide	-	
Closing period		
Last Month	-	
Side		
Any Side →	-	
abel		
Any Label →	•	