Commission & Reporting Module: Getting Started

SUMMARY

Learn how to activate Paperless Pipeline's Commission Module.

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Introduction

The Commission Module is an add-on module within Paperless Pipeline that allows you to calculate agent & broker commissions, generate financial and production reports, give agents access to commission statements and reports, and more. Activate a free trial of the Commission Module to see if it meets your office's needs.

Learn more about Pipeline's Commission Module here →

Who Can Do This?

Only master admins can activate and set up Commission Module.

How To

Activate Commission Module on your Pipeline Account

To activate Commission Module:

1 Go to Admin / Settings by clicking your name in the upper right corner, then [Admin / Settings].

2 From the Add-On Modules section of the left menu, select [Commission Module].

Search address, mis, agent, seller, buyer	C 🏠 Transactions Tasks Unassigned Unreviewed	Reports Reference
– People	Company Settings	
	Global Settings (PP Account ID: 2022-18673)	
Manage Locations	Company Name	
Manage Users	Paperless	
– Customize	Brokerage License #	
Company Settings		
Transaction Statuses		
Transaction Labels	Document Settings	
Document Labels	Only allow PDF documents	
Document Names		
Lead Sources	Prevent duplicate document uploads	
- Townslates	Include key dates on coversheet	
- Templates		
Business Holidays	Email Settings	
Checklists	Email agents expiring and closing transaction reminders	
Break Apart Docs	Email agents when admin comments on documents	
+ Backups	·	
	Feature Settings	
– Billing	Require two-factor authentication	
Upgrade / Downgrade		
Update Credit Card	Enable Reviewed Docs functionality	
Billing History	Enable Entered Docs feature	
- Add-On Modules	Enable New Offer feature	
Commission Module		
	Checklist Settings	
+ Integrations	Show checklist completion percentages to agents	
	Hide completed tasks in transaction checklists	
Current Plan		
Transaction quota 9	Transaction Settings	
Transactions created 0		

3 Click [Start free trial \rightarrow].

Search address, mls, agent, seller, buyer	C 🛆 Transactions Tasks Unassigned Unreviewed Re	ports Referenc	e + Add Transaction
- People			
Manage Locations	Meet the Commission Module		
Manage Users	Meet the commission module		
- Customize	The easier way to manage your commissions and reporting		
Company Settings			
Transaction Statuses			
Transaction Labels	Start free trial >		Aggregate Performance
Document Labels	start free that 4		Aggregate Performance
Document Names	30 day free trial. Cancel anytime.		Oregon Home & Land Co.
Lead Sources			Performance
– Templates	What's the Commission Module?	\sim	Agent sales volume \$8,259,000.00
Business Holidays			Agent listing volume \$0.00
Checklists	What does it cost?	\sim	Agent selling volume \$8,259,000.00
Break Apart Docs			Total units 2
+ Backups	Get a demo or ask a question	\sim	Listing units 0
– Billing			
Upgrade / Downgrade			
Update Credit Card			
Billing History			
- Add-On Modules			
Commission Module			

4 Click [Activate] to start a free 30-day trial of the Commission Module.

5 Set up and use Commission Module (learn more below).

If you've already utilized a free trial period of the Commission Module, you can still activate the module by clicking [Add the commission module \rightarrow].

You must be a master admin on your company's account to activate the Commission Module.

Set Up Commission Module ?

This video will walk you through setting up Commission Module from beginning to endLearn how to Set Up Commission Module here \rightarrow

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If you do not see the option to Manage Commissions on a transaction, make sure you:

- Gre a master admin or have admin-level financial permissions
- have at least one In-house Agent (that is not an Assistant) is added to the transaction
- have activated Commission Module (as described above).
- have set up Commission & CDA Settings for the transaction's Location. Learn how to Set Up Commission & CDA Settings →