

Set Up Commission Module

SUMMARY

Learn to set up Paperless Pipeline's Commission Module to support your office's specific commission needs.

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SET UP

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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. After the [Commission Module has been activated](#) →, it needs to be configured to meet your office's specific commission needs.

This article will walk you through those quick and easy steps, including how to set up [Commission & CDA Settings](#), [Company Settings](#), [User Settings](#), and custom [Fees and Deductions](#).

Once you've completed setting up Commission Module, [learn to Use Commission Module here](#) →

Who Can Do This?

Only [master admins](#) can complete the full setup of Commission Module.

Full Video

This video will walk you through setting up Commission Module from beginning to end.

 15:36

About the Commission Disbursement Authorization (CDA)

One of the useful features of the Commission Module is that it will automatically generate a [Commission Disbursement Authorization \(CDA\)](#) form, sometimes called a Commission Demand

Letter, when you manage commission on a transaction.

The CDA document instructs the Title Company, Escrow or Closing Attorney on how to disburse commission for a transaction.

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The CDA will be customized with:

- your *Company Logo* in the header
- an overview of the basic transaction information, including the *Sale Price* and *Gross Commission*
- the transaction's Escrow, Closing Attorney or Title Company *Contact* information
- a *Payable* section
- the *Signature* of the broker or person authorized to sign the document

Here is an example of a *Commission Disbursement Authorization (CDA)* document:



PP Test Realty, LLC
1300 East Main Street
Allen TX 76547
Phone: 555-555-0987

Commission Disbursement Authorization

Property Address: **65456 Red Barn Lane North Park TX 76374**

Buyer: Dawn Miller

Seller: Blake Somers

Acceptance Date: March 17, 2022

Closing Date: March 25, 2022

Sale Price:

\$500,000.00

Gross Listing Commission:

\$15,000.00 (3% of sale price)

Transaction Gross Commission:

\$15,000.00

Earnest Money Deposit:

\$1,000.00 (withheld by PP Test Realty, LLC)

Escrow

Company: Escrow Elite / 5000 Main Street

Officer: Jordan Baio

Email: jordan@paperlesspipeline.com

Phone: 555-555-5554

Payables

PP Test Realty, LLC

\$14,000.00

H Town Realty

\$17,500.00

Commissions due Coffee is for Closers should be sent to 123 Main Street Dallas TX 76226.

Authorized By

Carol Francis

Carol Francis

Broker / Owner

Coffee is for Closers Realty

March 29, 2022

Commission & CDA Settings

Customize how the commission disbursement form works by configuring *Commission & CDA Settings* for each Location in your company's account.

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To set up *Commission & CDA Settings* for a Location:

- 1 Click your name in the upper-right then [Admin / Settings].
- 2 From the left menu, click [Manage Locations]. You'll need to complete the setup for each Location in your account where you plan to manage commission.
- 3 Click the ⚙️ next to the Location, then [Commission & CDA Settings]. From this page, you'll be able to customize how the form works.
- 4 Complete the fields as appropriate (described below).
- 5 Click [Save Settings].

You'll need to complete the setup for each Location in your account where you plan to manage commission.

CDA Payability Settings

CDA Payability Settings determine who commission is paid to. For both agents and referrals, you have the option to instruct Escrow or Title to pay commission to your brokerage or to pay agents / referrers directly.

CDA Payability Settings

- Escrow/title/attorney is to send all commissions to PP Test Realty, LLC. Our company will disburse the appropriate commission to our agents.
- When PP Test Realty, LLC owes a referral commission, escrow/title/attorney is to send that referral commission to PP Test Realty, LLC. We will disburse this referral commission to the parties to whom it is due.

To set your preferred *CDA Payability Settings*:

- 1 Check the first box** if your brokerage is responsible for disbursing commission to agents. If you prefer Escrow or Title to pay agent commission directly to agents, leave the box unchecked.
- 2 Check the second box** if your brokerage is responsible for disbursing commission to referrals. If you prefer Escrow or Title to pay referral commission directly to agents, leave the box unchecked.

CDA Signature

Add the signature of the broker or person authorized to sign the CDA.

To add a *CDA Signature*:

- 1 Upload the *Signature Image*.**
- 2 Complete the fields with the *Signer's Name*, and *Signature Text*** (such as title and company name) that you'd like to appear under the signature.

CDA Signature

CDA signature image (.jpg or .png file type) *



No file chosen

CDA signer's name


Carol Francis *

CDA signature text

Broker / Owner
Coffee is for Closers Realty *

Location Contact Info

Add the broker or appropriate company contact information to be displayed in the header of the CDA, as shown in this example:

	PP Test Realty, LLC 1300 East Main Street Allen TX 76547 Phone: 555-555-0987
Commission Disbursement Authorization	
Property Address: 65456 Red Barn Lane North Park TX 76374	
Buyer: Dawn Miller	Seller: Blake Somers
Acceptance Date: March 17, 2022	Closing Date: March 25, 2022
Sale Price:	\$500,000.00

To add your *Location Contact Info*:

- 1 Enter your broker (or appropriate Contact's) *Address*, and *Phone Number*.
- 2 Optionally, enter their *Fax* or *Email*.

Location Contact Info

The Location Contact Info below is shown on the CDA letterhead.

Address

1300 East Main Street
Allen TX 76547

Phone

555-555-0987

Fax

Email

Franchise Fee

If your office pays a franchise or corporate fee per transaction, customize your company's *Franchise Fee* and optionally base the fee on a percentage or flat dollar amount. When managing commissions on a transaction, the *Franchise Fee* will be deducted before the *Broker / Agent Disbursement*.

To customize your *Franchise Fee*:

- 1 If your office does not pay a *Franchise Fee* per transaction, **leave the *Franchise fee amount* or *percent* empty.**
- 2 If your office does pay a *Franchise Fee* per transaction, **select [%] or [\$], then enter the *Franchise fee amount* or *percent*.**

- If the amount varies per transaction, enter 0.
- If the amount is fixed, enter the fixed amount.
- If the amount is based on a percentage of each transaction's *Net Commission* amount, enter the percentage amount and select [%].

3 Enter the *Franchise Fee custom name*.

Franchise Fee


Franchise fee amount or percent

%

\$

Franchise fee custom name

*

 You can edit the *Franchise Fee* amount when you're managing commission on a transaction as needed.

Off-the-Top Deductions

You can optionally collect custom off-the-top *Deductions* such as B&O, Royalty Fee or State Tax.

To turn on the ability to collect off-the-top *Deductions*:

- 1** Check the box next to [Allow off-the-top deductions]. If you do not collect off-the-top deductions, leave the box unchecked.

Off-the-top Deductions

Allow off-the-top deductions

Earnest Money Deposit

You have the option to allow *Earnest Money Deposit* deductions if your brokerage holds earnest money that needs to be credited at closing.

To allow *Earnest Money Deposit*:

- 1 Check the box next to **[Allow earnest money deposit deduction]**. If you do not hold earnest money, leave the box unchecked.

Earnest Money Deposit

Allow earnest money deposit deduction

CDA Instructions

Create your own custom text that will appear on the CDA. For example, you can include wiring instructions or details on where the Title Company should mail the commission.

Payables

PP Test Realty, LLC	\$14,000.00
H Town Realty	\$17,500.00

Commissions due Coffee is for Closers should be sent to 123 Main Street Dallas TX 76226.

Authorized By

Carol Francis

Carol Francis
Broker / Owner
Coffee is for Closers Realty

To add CDA Instructions:

- 1 Enter your desired instructions in CDA instructions (to be shown above Payables) and / or CDA instructions (to be shown below Payables).

CDA Instructions

CDA instructions (to be shown above Payables)

CDA instructions (to be shown below Payables)

Commissions due Coffee is for Closers should be sent to
123 Main Street Dallas TX 76226.

[Learn how to Format CDA Special Instructions →](#)

 You can add or edit these default *CDA Instructions* when you're managing commission on a transaction as needed.

Company Settings ▾

Configure your commission-related *Company Settings* to meet your office's specific needs.

 2:28

To set up *Company Settings*:

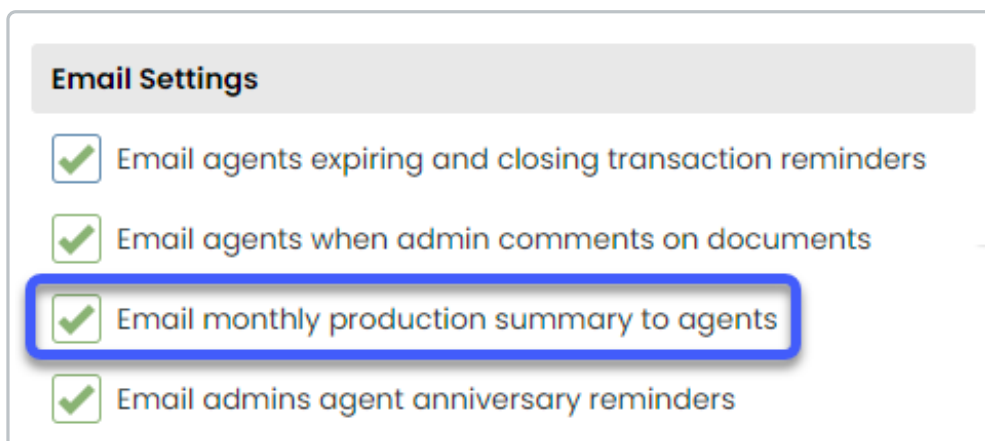
- 1 Click **[Company Settings]** from the left menu of [Admin / Settings](#) .

Email Monthly Production Summary to Agents

Opt to automatically email each of your agents a *Monthly Production Summary* including their production details, number of closings, Sales Volume, and commission earned for the last month as well as year-to-date. [Learn more about the Monthly Production Summary](#) →

To automatically email the *Monthly Production Summary* to your agents:

- 1 Under *Email Settings*, check the box next to, **[Email Monthly Production Summary to Agents]**.



Email Settings

- Email agents expiring and closing transaction reminders
- Email agents when admin comments on documents
- Email monthly production summary to agents
- Email admins agent anniversary reminders

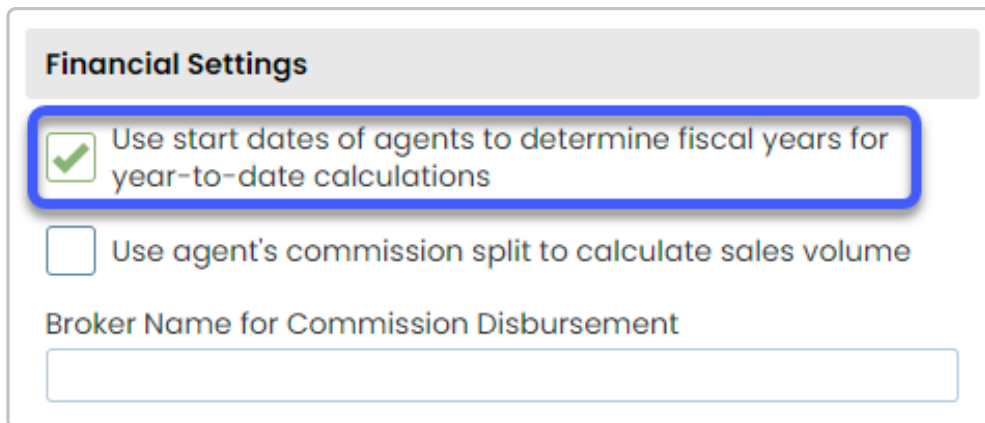
Use Start Dates of Agents to Determine Fiscal Years for Year-to-Date Calculations

If your agents are on a commission plan, you may track their year-to-date figures based on their *Start Date*.

To track year-to-date figures based on your agents' *Start Dates*:

- 1 Under *Financial Settings*, click the box next to [Use start date of agents to determine fiscal years for year-to-date calculations].

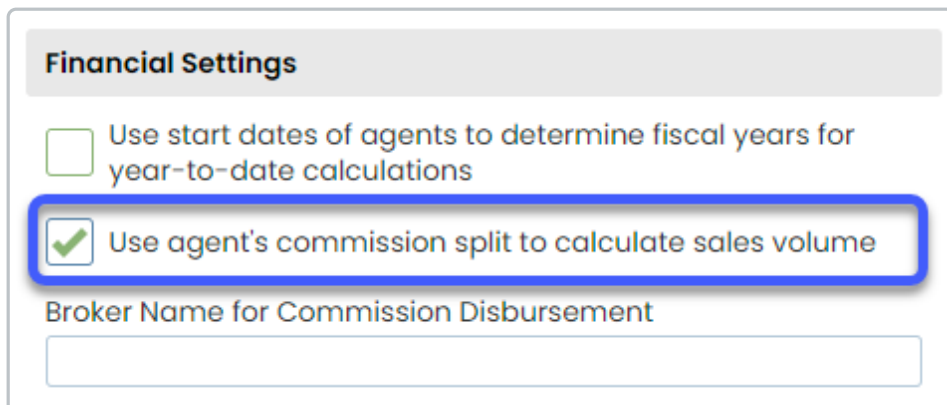
If you prefer to base year-to-date calculations on the calendar year (January through December), leave the box unchecked.



The screenshot shows a 'Financial Settings' panel. The first checkbox, 'Use start dates of agents to determine fiscal years for year-to-date calculations', is checked and highlighted with a blue border. The second checkbox, 'Use agent's commission split to calculate sales volume', is unchecked. Below these is a text input field labeled 'Broker Name for Commission Disbursement'.

Use Agent's Commission Split to Calculate Sales Volume

Sales Volume can be automatically allocated based on the agent's share of commission when there are multiple agents on the transaction. When you're managing commissions on a transaction, you'll have the option to edit those pre-allocated *Sales Volumes*, as needed.



The screenshot shows a 'Financial Settings' panel. The first checkbox, 'Use start dates of agents to determine fiscal years for year-to-date calculations', is unchecked. The second checkbox, 'Use agent's commission split to calculate sales volume', is checked and highlighted with a blue border. Below these is a text input field labeled 'Broker Name for Commission Disbursement'.

To automatically allocate *Sales Volume* based on the agent's *Commission Split* when there are multiple agents on a transaction:

- 1 Check the box next to [Use agent's commission split to calculate sales volume]

For example, if two agents are splitting the commission 50% on a home that sold for \$500,000, the system will divide the *Sales Volume* 50% and allocate \$250,000 to each agent. This will default the *Sales Volume* amount to accurately reflect the total *Sales Volume* of \$500,000 for the transaction.

Broker / Agent Commission Disbursement

Distribute Listing Commission: \$13,950.00

1 Distribute listing gross between 2 agents

Geoffrey McGee	<input type="text" value="50%"/>	*	<input checked="" type="checkbox" value=""/>	%	\$
Lucy Curly	<input type="text" value="50%"/>	*	<input checked="" type="checkbox" value=""/>	%	\$

2 Allocate sales volume and units

Sales Volume	Unit
Geoffrey McGee <input type="text" value="\$250,000"/>	<input type="text" value="0.5"/>
Lucy Curly <input type="text" value="\$250,000"/>	<input type="text" value="0.5"/>

3 Specify agent / brokerage splits

	Brokerage	Agent
Geoffrey McGee	%	<input type="text" value=""/> % <input checked="" type="checkbox" value=""/> % <input type="checkbox" value=""/> \$
Lucy Curly	%	<input type="text" value=""/> % <input checked="" type="checkbox" value=""/> % <input type="checkbox" value=""/> \$

If you prefer to allocate the full *Sales Price* for each agent as a default, leave the box unchecked.

For example, if the *Sales Price* is \$500,000, each agent will receive \$500,000 in *Sales Volume*. Since \$500,000 is allocated to each agent, the company's *Sales Volume* will reflect \$1,000,000.

Broker / Agent Commission Disbursement

Distribute Listing Commission: \$13,950.00

1 Distribute listing gross between 2 agents

Geoffrey McGee	<input type="text" value="50%"/>	*	<input type="checkbox" value=""/>	%	\$
Lucy Curly	<input type="text" value="50%"/>	*	<input type="checkbox" value=""/>	%	\$

2 Allocate sales volume and units

Sales Volume	Unit
Geoffrey McGee <input type="text" value="\$500,000"/>	<input type="text" value="0.5"/>
Lucy Curly <input type="text" value="\$500,000"/>	<input type="text" value="0.5"/>

3 Specify agent / brokerage splits

	Brokerage	Agent
Geoffrey McGee	%	<input type="text" value=""/> % <input type="checkbox" value=""/> % <input type="checkbox" value=""/> \$
Lucy Curly	%	<input type="text" value=""/> % <input type="checkbox" value=""/> % <input type="checkbox" value=""/> \$

Most offices prefer to check this box so that the company Sales Volume reflects the Sales Price.



Broker Name for Commission Disbursement

Customize the *Broker Name for Commission Disbursement* if your brokerage's share of the commission should be made payable to a name other than your *Company Name*.

To set the broker's payable name as something other than your *Company Name*:

- 1 Enter the broker's name. Leave blank to use your *Company Name*.

Financial Settings

Use start dates of agents to determine fiscal years for year-to-date calculations

Use agent's commission split to calculate sales volume

Broker Name for Commission Disbursement

Paperless Realty, LLC

User Settings

Enter your agents' current *Commission Percent*, *Next Commission Split*, and other info, as well as grant admins permission to *Enter Financial Data* and / or *View Financial Reports*.

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To manage user settings:

- 1 Click **[Manage Users]** from the left menu of [Admin / Settings](#) .

Add Agent's Commission Percent, Cap & Other Info

You can enter your agent's current commission split percentage to allow the system to automatically populate that information when you're managing commissions on a transaction.

To add an *Agent's Commission Percent Cap, & Other Info*

- 1 Click an agent's name to open their profile.
- 2 Scroll down to the **Commission Percent** section. If needed, click **[+]** to expand that section.
- 3 Complete the desired fields (as described below).
- 4 Select **[Update User]** to save.

– Commission Percent, Cap, & Notes, Payable Corp, Start Date


Commission Percent

Next Commission Split Threshold

Commission Notes

Payable LLC or Corp

User Start Date

 You'll need to complete the setup for each agent.

Commission Percentage

Enter the agent's share of commission in the *Commission Percentage* field.

Commission Percent

Next Commission Split Threshold

Next Commission Split Threshold tracks how much of an agent's commission needs to be been paid to the brokerage before they'll advance to the next level. If your agents are on a commission plan that allows them to increase to a higher commission split once they've reached their cap, track their *Next Commission Split Threshold* to allow the system to warn you when the agent has or is about reach their cap.

To set an agent's *Next Commission Split Threshold*:

- 1 Enter the agent's *Next Commission Split Threshold*. If your agents are not on a commission plan, leave the field blank.

Next Commission Split Threshold

\$20,000.00

For example, if your agent is on a 75% commission split until they've paid the broker \$20,000 of commission, you would enter \$20,000 in this field. Once the broker has earned \$20,000, the system will warn you that the agent has or is about to reach their cap.

<p>Calculated Commission Amounts</p> <table border="0" style="width: 100%;"> <tr> <td>Commission Type</td> <td style="text-align: right;">Listing</td> </tr> <tr> <td>Gross Commission:</td> <td style="text-align: right;">\$56,000.00</td> </tr> <tr> <td>Royalty:</td> <td style="text-align: right;">\$3,920.00</td> </tr> <tr> <td>Distributable Commission (Gross - Referral - Royalty):</td> <td style="text-align: right;">\$52,080.00</td> </tr> </table> <p>1 Next, we will help you distribute the broker/agent commission of \$52,080.00.</p> <p style="text-align: right;">Edit Prev Step</p> <hr/> <p>Broker / Agent Commission Disbursement</p> <p>Distribute Listing Commission: \$52,080.00</p> <p>1 Distribute listing gross between 2 agents</p> <table border="0" style="width: 100%;"> <tr> <td>Angle Oul</td> <td style="text-align: center;">50%</td> <td style="text-align: center;">*</td> <td style="text-align: center;">%</td> <td style="text-align: center;">\$</td> </tr> <tr> <td>George Payne</td> <td style="text-align: center;">50%</td> <td style="text-align: center;">*</td> <td style="text-align: center;">%</td> <td style="text-align: center;">\$</td> </tr> </table> <p>2 Allocate sales volume and units</p> <table border="0" style="width: 100%;"> <tr> <td></td> <td style="text-align: center;">Sales Volume</td> <td style="text-align: center;">Unit</td> </tr> <tr> <td>Angle Oul</td> <td style="text-align: center;">\$140,000</td> <td style="text-align: center;">0.5</td> </tr> <tr> <td>George Payne</td> <td style="text-align: center;">\$14,000</td> <td style="text-align: center;">0.5</td> </tr> </table> <p>3 Specify agent / brokerage splits</p> <table border="0" style="width: 100%;"> <tr> <td></td> <td style="text-align: center;">Brokerage</td> <td style="text-align: center;">Agent</td> </tr> <tr> <td>Angle Oul</td> <td style="text-align: center;">30%</td> <td style="text-align: center;">70%</td> </tr> <tr> <td>1 George Payne</td> <td style="text-align: center;">25%</td> <td style="text-align: center;">75%</td> </tr> </table> <p style="text-align: center;">Calculate & Continue</p> <hr/> <p>Fees & Deductions</p> <p>Broker's Fees & Deductions</p>	Commission Type	Listing	Gross Commission:	\$56,000.00	Royalty:	\$3,920.00	Distributable Commission (Gross - Referral - Royalty):	\$52,080.00	Angle Oul	50%	*	%	\$	George Payne	50%	*	%	\$		Sales Volume	Unit	Angle Oul	\$140,000	0.5	George Payne	\$14,000	0.5		Brokerage	Agent	Angle Oul	30%	70%	1 George Payne	25%	75%	<p>0 This transaction's commission may push the agent over their next commission split threshold.</p> <p>George Payne - YTD figures (Feb. 21, 2022 to March 29, 2022)</p> <p>Agent performance</p> <table border="0" style="width: 100%;"> <tr> <td>Closed transactions:</td> <td style="text-align: right;">3</td> </tr> <tr> <td>Closed listings:</td> <td style="text-align: right;">3</td> </tr> <tr> <td>Closed sales:</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Units:</td> <td style="text-align: right;">3</td> </tr> <tr> <td>Sales volume:</td> <td style="text-align: right;">\$1,766,456.00</td> </tr> </table> <p>Commission split threshold info</p> <table border="0" style="width: 100%;"> <tr> <td>Agent's current split:</td> <td style="text-align: right;">75%</td> </tr> <tr> <td>Commission to brokerage before this transaction:</td> <td style="text-align: right;">\$12,609.78</td> </tr> <tr> <td>Next commission split threshold:</td> <td style="text-align: right;">\$20,000.00</td> </tr> <tr> <td>Agent start date:</td> <td style="text-align: right;">Feb. 21, 2019</td> </tr> </table> <p>Commission totals before this transaction</p> <table border="0" style="width: 100%;"> <tr> <td>Commission produced before agent/broker split</td> <td style="text-align: right;">\$50,439.12</td> </tr> <tr> <td>Agent gross commission:</td> <td style="text-align: right;">\$37,829.34</td> </tr> <tr> <td>Agent net commission:</td> <td style="text-align: right;">\$22,484.46</td> </tr> <tr> <td>Agent gross in-house referral commission:</td> <td style="text-align: right;">\$0.00</td> </tr> </table> <p>Fees paid to brokerage</p> <table border="0" style="width: 100%;"> <tr> <td>FMLS Fee:</td> <td style="text-align: right;">\$14,597.47</td> </tr> <tr> <td>Administrative Fee:</td> <td style="text-align: right;">\$547.41</td> </tr> <tr> <td>Transaction Fee:</td> <td style="text-align: right;">\$200.00</td> </tr> </table> <p>Commission notes for George Payne</p> <p>75/25 split up to \$20k 90/10 split after \$20k Collect \$140 TX Fee from Agent</p> <p>Update commission split for George Payne →</p>	Closed transactions:	3	Closed listings:	3	Closed sales:	0	Units:	3	Sales volume:	\$1,766,456.00	Agent's current split:	75%	Commission to brokerage before this transaction:	\$12,609.78	Next commission split threshold:	\$20,000.00	Agent start date:	Feb. 21, 2019	Commission produced before agent/broker split	\$50,439.12	Agent gross commission:	\$37,829.34	Agent net commission:	\$22,484.46	Agent gross in-house referral commission:	\$0.00	FMLS Fee:	\$14,597.47	Administrative Fee:	\$547.41	Transaction Fee:	\$200.00
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Commission Notes

Enter any *Commission Notes* such as the agent's commission plan or fee reminders. An agent's *Commission Notes* are displayed next to their name when managing commissions on a transaction.

To add an agent's *Commission Notes*:

- 1 Enter the agent's *Commission Notes*. If your agents are not on a commission plan, leave the field blank.

Commission Notes

75/25 split up to \$20k
90/10 split after \$20k
Collect \$140 TX Fee from Agent

Payable, LLC or Corp

Set an agent's *Payable, LLC or Corp* if your agents are paid directly at closing and their payable name should show as their *Company Name* (or a name other than their *First* and *Last Name*).

To set an agent's *Payable Name*:

- 1 Enter the agent's *Payable LLC or Corp*. If the agent's payable should be made to their first and last name, leave the field blank.

Payable LLC or Corp

GP Realty, LLC.


User Start Date

It is especially important to enter agents' *Start Dates* if you are tracking their year-to-date figures based on their anniversary date.

To add an agent's *Start Date*:

- 1 Enter or select the agent's *Start Date*.

User Start Date

02/21/2019 

Grant Financial Permissions to Admins

Grant certain admins permission to manage commissions and / or view reports.

To grant financial permissions to an admin:

- 1 From [Manage Users](#) , click the admin's name.
- 2 Scroll down to the User Permissions section.
- 3 Check the box next to your desired financial permissions for the admin in each desired Location.
- 4 Select [Update User].

User Permissions

Grant permissions below to control the specific actions this user may perform in the selected office location.

+ Account-wide Permissions

- Allen

Transactions

- Create transactions
- Change listing/selling agents of own transaction
- Change transaction status
- View all transactions for this location (admin-level permission)

Documents

- Upload docs
- Assign docs to transactions
- Review docs (admin-level permission)
- Mark docs as entered (admin-level permission)
- Delete any docs in this location (admin-level permission)

Checklists

- Assign checklist templates to transactions
- Fully manage checklists and templates (admin-level permission)

Financials

- Enter financial data (admin-level permission)
- View financial reports (admin-level permission)


Other

- Create users and locations (admin-level permission)

+ Paperless Real Estate

+ Bluffington Office



 Both financial permissions are admin-level permissions and should not be given to agents as it will give them access to other agents' financial information.



Permissions are based on Location. If you would like an admin to have permissions in multiple Locations, expand each Location and grant desired permissions within each.

Enter Financial Data

Allow admins permission to *Enter Financial Data* (generate *Commission Disbursement Authorizations*) for a Location.

To grant an admin permission to *Enter Financial Data*:

- 1 For each desired location, check the box next to [Enter financial data (admin-level permission)].

View Financial Reports


Allow admins permission to *View Financial Reports* for a Location.

To grant an admin permission to *View Financial Reports*:

- 1 For each desired location, check the box next to [View financial reports (admin-level permission)].

Fees & Deductions

Set up your company's custom *Fees* and *Deductions*.

 4:39

Agent Fees

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

To add agent fees:

- 1 Go to the **Agent Fees** page in Pipeline.

Search address, mlx, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help Hollis H.

Manage Agent Fees

Enter the different types of agent fees payable to the brokerage out of an agent's commission. Default fee amounts are optional. You will have the option to apply these fees when managing commissions on transactions. [Learn more here](#)

Fee Name	Default Fee Amount	Fee % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis
<input type="text" value="Unused fee"/>	\$ % \$	Select % Basis

● If you run out spaces for fees, click Save to add more.

Save Settings

- 2 For each fee, **type the fee name in the Fee Name column.**
- 3 In the *Default Fee Amount* column, **enter the standard amount for the fee.** The amount you enter here will be inserted for that fee when managing commissions on transactions. You can change the amount during that process for any individual transaction, if needed.



If the agent fee varies from transaction to transaction, leave the fee amount blank.

- 4 Choose [%] or [\$] to specify whether your default amount will be based on a percent or dollar amount.
- 5 If you selected the [%] option, select the *Fee % Basis* in the next column to specify the value on which to calculate the percentage.

Fees can be automatically calculated based on a percentage of *Gross Commission*, *Sale Price*, *Distributable Commission*, *Broker Gross*, *Agent Gross*, or *Gross Commission less Referral*.

- 6 Click [Save Settings].

Client Fees

Client Fees are fees paid by buyers or sellers outside of normal commissions. *Client Fees* can be paid directly to the brokerage or agent on the transaction. Some examples of *Client Fees* include agent bonuses, state fees, or taxes or transaction fees charged to clients.

To add client fees:

- 1 Go to the Client Fees page in Pipeline.

The screenshot shows the 'Manage Client Fees' page in a software application. The page has a search bar at the top left and a navigation menu at the top right. The main content area is titled 'Manage Client Fees' and contains a table with the following columns: 'Fee Name', 'Default Fee Amount', and 'Fee % Basis'. The table has 10 rows, each with 'Unused fee' in the 'Fee Name' column, '\$' in the 'Default Fee Amount' column, and 'Select % Basis' in the 'Fee % Basis' column. Below the table is a 'Save Settings' button. A note at the bottom of the table says: 'If you run out spaces for fees, click Save to add more.'

- 2 For each fee, **type the fee name in the *Fee Name* column.**
- 3 In the *Default Fee Amount* column, **enter the standard amount for the fee.** The amount you enter here will be inserted for that fee when managing commissions on transactions. You can change the amount during that process for any individual transaction, if needed.



If the client fee varies from transaction to transaction, leave the fee amount blank.

- 4 **Choose [%] or [\$]** to specify whether your default amount will be based on a percent or dollar amount.
- 5 If you selected the [%] option, select the fee percent basis in the next column to specify the value on which to calculate the percentage.
- 6 **Click [Save Settings].**

When managing commissions on transactions later, default fee amounts will auto-populate but can be updated or deleted as needed.

Deductions

Deductions are fees that can be taken off-the-top before the broker-agent split or paid directly from the broker or agent share of commission. Some examples of *Deductions* include Charitable Contributions, Client Rebates, MLS Fees, Home Warranty Fees, or payments to an in-house user such as an assistant or transaction coordinator.

- *Off-the-top Deductions* can be used to pay money to the broker, in-house agents or third parties.
- Regular *Deductions* paid from the broker or agent's share of commission can be paid to in-house agents or third parties.

To add deductions:


- 1 **Go to the [Deductions](#) page in Pipeline.**

The screenshot shows the 'Manage Deductions' page. On the left is a navigation menu with categories: People, Customize, Templates, Financials, and Backups. The main area is titled 'Manage Deductions' and contains a table with the following structure:

Deduction Name	Default Amount	Deduction % Basis
Unused fee	\$ % \$	Select % Basis
Unused fee	\$ % \$	Select % Basis
Unused fee	\$ % \$	Select % Basis
Unused fee	\$ % \$	Select % Basis
Unused fee	\$ % \$	Select % Basis
Unused fee	\$ % \$	Select % Basis
Unused fee	\$ % \$	Select % Basis
Unused fee	\$ % \$	Select % Basis
Unused fee	\$ % \$	Select % Basis
Unused fee	\$ % \$	Select % Basis

Below the table, there is a note: 'If you run out spaces for deductions, click Save to add more.' and a green 'Save Settings' button.

- 2 For each deduction, type the deduction name in the *Deduction Name* column.
- 3 In the *Default Amount* column, enter the standard amount for the deduction. The amount you enter here will be inserted for that deduction when managing commissions on transactions. You can change the amount during that process for any individual transaction, if needed.

 If the deduction varies from transaction to transaction, leave the deduction amount blank.

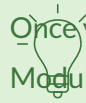
- 4 Choose [%] or [\$] to specify whether your default amount will be based on a percent or dollar amount.
- 5 If you selected the [%] option, select the deduction percent basis in the next column to specify the value on which to calculate the percentage.

- *Off-the-top (OTT) Deductions* can be calculated as a percentage of *Gross Commission* or *Sale Price*.

- *Regular Deductions* can be calculated as a percentage of *Gross Commission*, *Sale Price*, *Distributable Commission*, *Broker Gross*, *Agent Gross*, or *Gross Commission less Referral Commission*.

- 6 Click [Save Settings].

When managing commissions on transactions later, default deduction amounts will auto-populate but can be updated or deleted as needed.

 Once you complete the Commission Module setup, you're ready to start using the Commission Module. [Learn how to Use Commission Module here →](#)
