

# Use Commission Module

## SUMMARY

Learn how to use Paperless Pipeline's Commission Module.

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## HOW TO

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**Introduction**

Once you [complete the Commission Module setup](#) →, you're ready to start using the Commission Module. This article will walk you through how to manage commissions on a transaction, how to view and download a transaction's *Commission Disbursement Authorization*, *Financial Info* and *Commission & Fees Statements*, and how to view and download financial reports.

## Who Can Do This?

Only [master admins](#) and admins with financial permissions can manage / view commissions.

## Full Video

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

 19:43

## Manage Commissions on a Transaction

From within a transaction, you will see the option to *Manage Commissions* on the left menu.

 15:30

To manage commissions on a transaction:

- 1 Go to the transaction.
- 2 Click [Manage Commissions] from the left menu.
- 3 Enter the transaction's commission information in each section(as described below).
- 4 Click [Calculate & Continue] to move through each section.
- 5 Click [Save Commissions].

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

- are 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. [Learn how to Activate Commission Module →](#)
- have set up *Commission & CDA Settings* for the transaction's *Location*. [Learn how to Set Up Commission & CDA Settings →](#)

## Escrow & Sale Info

The first step of managing commissions is to add the transaction's *Escrow & Sale Info*.

## Escrow/ Title Contact

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If a *Contact* with the role Escrow, Title, or Settlement is added on the transaction, that *Contact's* information will automatically populate into the *Escrow / Title* section automatically. You may edit the *Contact* information if needed.

| Escrow / Title      |                          |             |                           |              |             |
|---------------------|--------------------------|-------------|---------------------------|--------------|-------------|
| Escrow / Title Role | Company / Address        | Name        | Email                     | Phone        | Fax / Other |
| Escrow *            | Escrow Elite / 5000 Main | Jordan Baio | * jordan@paperlesspipelli | 555-555-5554 |             |

[Learn how to Add a Contact to a Transaction →](#)

## Buyer's Name

If the *Buyer's Name* is added on the transaction already, it will be pre-populated. You may add or edit the *Buyer's Name* as needed.

## Sale Price

If the *Sale Price* is added on the transaction already, it will be pre-populated. You may add or edit the *Sale Price* as needed.

## Commission

Enter the *Commission* amount as a percentage of the *Sale Price* or as a flat dollar amount. If the transaction is dual-sided, enter commission due for both the *Listing* and *Selling* side.



The transaction's *Commission Summary* information appears in the left menu for easy reference.

Manage Commissions  
← Go back to 65456 Red Barn Lane No...

**Total Commission**  
\$15,000.00

**Lead Source**  
Buyer: Zillow  
Seller: Sphere of Influence

**Transaction Commission Summary**  
3.5% Listing Commission  
Referral: 25% to H Town Realty

### Manage Commissions

| Escrow / Title      |                          |             |              |
|---------------------|--------------------------|-------------|--------------|
| Escrow / Title Role | Company / Address        | Name        | Email        |
| Escrow *            | Escrow Elite / 5000 Main | Jordan Baio | * jordan@pap |

| Sale Info        |                |
|------------------|----------------|
| Buyer's Name     | Dawn Miller    |
| Sale Price       | \$500,000.00 * |
| Commission Basis | Sale Price     |

## Referral Commission

If your brokerage owes any referral commission taken before the *Broker / Agent Disbursement*, add the *Referral Commission* amount as percentage of the *Gross Commission* or as a flat dollar amount.

To enter *Referral Commission*:

- 1 Enter the referral amount as a percentage or as a flat dollar amount.
- 2 To pay the referral to an in-house agent or user, check the box next to, [This is an in-house referral]. If the referral is being paid to an external person or company, leave the box unchecked.

## Franchise Fee

If you've turned on the Franchise Fee option, you will see the option to deduct the Franchise Fee. If a default amount has been set for your Franchise Fee, that amount will be pre-populated. If needed, you can update the Franchise Fee amount.

## Off-the-Top Deductions

If you've turned on Off-the-Top Deductions, you will see the option to enter off-the-top deductions.

Off-the-top Deductions can be calculated as a percentage or as a flat dollar amount. When calculated as a percentage, Off-the-top Deductions can be calculated as a percentage of the Gross Commission, Sale Price or, Gross Commission Less Referral Commission.

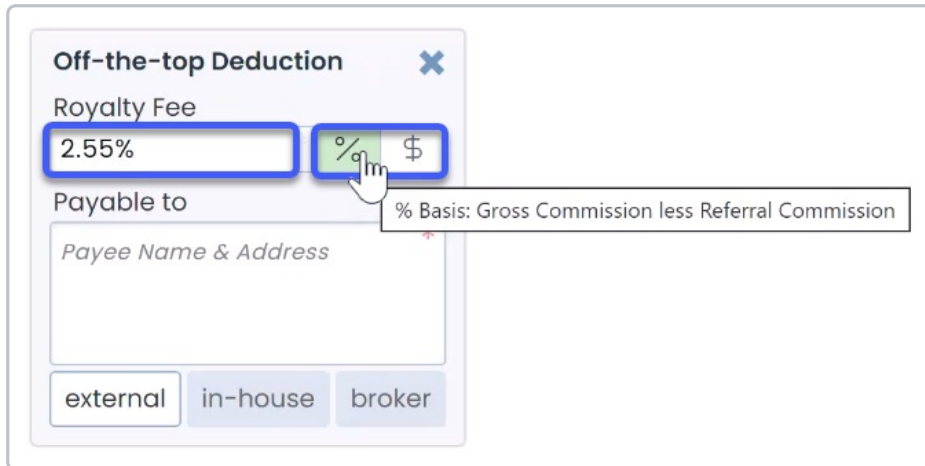
The screenshot shows a form titled "Sale Info" with the following fields and options:

- Buyer's Name: Dawn Miller
- Sale Price: \$500,000.00
- Commission Basis: Sale Price
- Listing Side: Commission: 3.5%
- Referral Commission: 25%
- This is an in-house referral
- Coffee is for Closers Franchise Fee: 2%
- Enter off-the-top deductions (dropdown menu)
- Calculate & Continue button

A blue arrow points to the "Enter off-the-top deductions" dropdown menu.

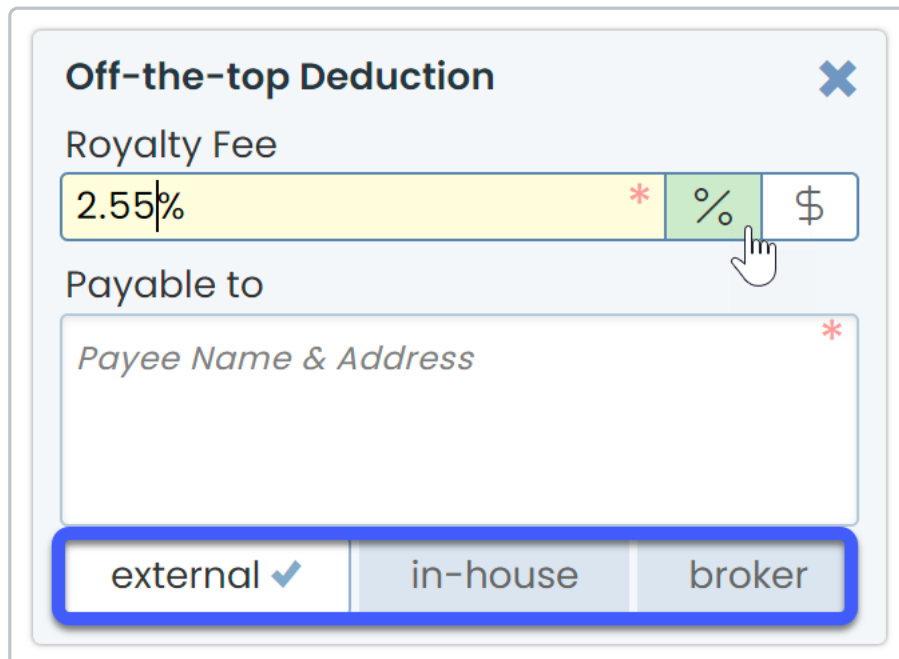
To add an *Off-the-top Deduction*:

- 1 Click [Enter off-the-top deductions].
- 2 Select the deduction type from the dropdown.If a default amount has been set for the deduction type, the amount will be pre-populated.
- 3 Enter the amount or edit the default amount as a dollar amount or as a percentage If a default percentage has been set and you're unsure what it is based on, hover over % to view the % Basis set for the Deduction.



The screenshot shows a form titled "Off-the-top Deduction" with a close button (X). The "Royalty Fee" field contains "2.55%". To the right of the input field are two buttons: a green button with a percentage sign (%) and a white button with a dollar sign (\$). A mouse cursor is hovering over the percentage button, which has triggered a tooltip that reads "% Basis: Gross Commission less Referral Commission". Below the "Royalty Fee" field is a "Payable to" field with the placeholder text "Payee Name & Address". At the bottom of the form are three buttons: "external", "in-house", and "broker".

- 4 Select who the deduction should be paid to.*Off-the-top Deductions* can be paid to external people or companies, in-house agents or users, or to the broker.



The screenshot shows the same "Off-the-top Deduction" form. The "Royalty Fee" field now has a yellow background and contains "2.55%". The percentage sign button is highlighted with a green background, and a mouse cursor is clicking it. The "Payable to" field is empty and has a red asterisk (\*) next to it. The "external" button at the bottom is now selected, indicated by a blue checkmark and a blue border around the button area. The "in-house" and "broker" buttons are unselected.

- To pay the off-the-top deduction to an external person or company,select [external], enter the payee's name and address into the *Payable To* field.

- To pay the off-the-top deduction to an in-house agent or user, select [*in-house*], type the user's name, and select them from the list.
- To pay the off-the-top deduction to the broker, select [*broker*].

Calculate & Continue

To calculate the commission amounts:

- 1 Click [*Calculate & Continue*].

**Off-the-top Deduction** ✕

Royalty Fee  
2.55% \* % \$

*i* This deduction will be paid to the broker.

external in-house broker ✓

- Enter another off-the-top deduction - ▾

**Calculate & Continue**

**Broker / Agent Commission Disbursement**

Distribute Listing Commission:

## Broker / Agent Disbursement

In the *Broker / Agent Disbursement* section, you'll be able to distribute the commission between the brokerage and agent(s).

**Broker / Agent Commission Disbursement**

Distribute Listing Commission: **\$12,527.81**

**1 Allocate sales volume and units**

|                | Sales Volume | Unit |
|----------------|--------------|------|
| Daniel Lorence | \$500,000    | 1    |

**2 Specify agent / brokerage splits**

|                | Brokerage | Agent      |
|----------------|-----------|------------|
| Daniel Lorence | 20%       | 80% * % \$ |

**Calculate & Continue**

## Distribute Gross Between Agents



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

## Allocate Sales Volume and Units

The system will automatically allocate *Sales Volume* and *Units* to your agent(s) on the transaction. Edit the default amount as needed.

If you opted to use [agent's commission split to calculate Sales Volume](#), the system will automatically allocate *Sales Volume* based on the agent's *Commission Split* when there are multiple agents on a transaction. If you have not turned on that option, the system will allocate the full *Sales Volume* and *Units* to your agent(s) on the transaction by default.

## Specify Agent / Brokerage Splits

Specify the agent and broker splits as a percentage or dollar amount.

If the [agent's default Commission Percentage](#) is set in their profile, that information will be automatically populated and can be edited as needed.

## View Agent's Year-to-Date Pop-Up

When you click into an amount field for an agent, a pop-up box including the agent's year-to-date figures will appear on the right. The figures shown for the agents will only include *Closed* transactions where you have managed commissions.

If you opted to use [agents Start Dates to calculate year-to-date figures](#), their figures will be based on fiscal year and will reset on the anniversary of their *Start Dates*. Otherwise, the figures will be based on the current calendar year (January through December).

Closures Franchise Fee - 011): \$12,527.81

Next, we will help you distribute the broker/agent commission of \$12,527.81, followed by the referral commission of \$4,375.00.

[Edit Prev Step](#)

### Broker / Agent Commission Disbursement

Distribute Listing Commission: \$12,527.81

- Allocate sales volume and units
- Specify agent / brokerage splits

| Agent          | Brokerage |
|----------------|-----------|
| Daniel Lorence | 20%       |
| Daniel Lorence | 80%       |

[Calculate & Continue](#)

#### Daniel Lorence - YTD figures (April 7, 2021 to March 25, 2022)

**Agent performance**

|                      |              |
|----------------------|--------------|
| Closed transactions: | 2            |
| Closed listings:     | 2            |
| Closed sales:        | 0            |
| Units:               | 0.84         |
| Sales volume:        | \$500,000.00 |

**Commission split threshold info**

|  |               |
|--|---------------|
| Agent's current split:                           | 80%           |
| Commission to brokerage before this transaction: | \$3,090.37    |
| Next commission split threshold:                 | \$10,000.00   |
| Agent start date:                                | April 7, 2020 |

**Commission totals before this transaction**

|   |             |
|---|-------------|
| Commission produced before agent/broker split | \$19,240.88 |
| Agent gross commission:                       | \$16,517.71 |
| Agent net commission:                         | \$16,317.71 |
| Agent gross in-house referral commission:     | \$4,870.80  |

**Fees paid to brokerage**

|      |          |
|------|----------|
| E&O: | \$300.00 |
|------|----------|

**Commission notes for Daniel Lorence**

Daniel Lawrence wired to Chase Bank 34566665, Account 44566677

[Update commission split for Daniel Lorence](#)

## Agent Performance

The *Agent Performance* section includes the number of *Closed* transactions broken down by *Side*, *Units*, and *Sales Volume* figures.

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#### Commission Split Threshold Info

The *Commission Split Threshold Info* section displays how much commission the agent has paid to the brokerage so far.

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#### Next Split Threshold Warning

If the agent is about to reach their *Next Commission Split Threshold*, the system will highlight the area so you can adjust the *Commission Percentage* accordingly.

[Learn how to set Agent's Next Commission Split Threshold →](#)

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#### Quick Link to Update Agent's Commission Split

If you need to update the *Commission Percentage* for an agent in their User Profile, click [Update Commission Split →]. The agent's User Profile will be opened in another window where you can make the update.

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#### Commission Totals Before This Transaction

The *Commission totals before this transaction* section will display the agent's various commission totals.

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#### Fees paid to brokerage

The *Fees paid to brokerage* section shows a breakdown of any fees the agent has paid to the brokerage.

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#### View & Copy Agent's Commission Notes

View any *Commission Notes* for the agent.



Click the [copy icon] to copy the agent's *Commission Notes*. This is helpful if you need to paste info from the agent's *Commission Notes* into the *CDA Special Instructions*.

| Fees paid to brokerage   |          |
|--|----------|
| E&O:   | \$300.00 |
| Commission notes for Daniel Lorence                            |          |
| Daniel Lawrence wired to Chase Bank 34566665, Account 44556677 |          |
| <a href="#">Update commission split for Daniel Lorence →</a>   |          |

### Calculate & Continue

To calculate the commission amounts and move on to the next step:

- 1 Click [Calculate & Continue].

**2 Specify agent / brokerage splits**

|                | Brokerage | Agent      |
|----------------|-----------|------------|
| Daniel Lorence | 20%       | 80% * % \$ |

**Calculate & Continue**

---

**Distributable Commission and Fees**

|                            |                    |
|----------------------------|--------------------|
| Distributable commission   | <b>\$12,527.81</b> |
| <b>Daniel Lorence</b>      |                    |
| Agent's gross commission   | <b>\$10,022.25</b> |
| <b>PP Test Realty, LLC</b> |                    |

## Fees & Deductions

Once you've [set up fees and deductions](#), you'll have the option to collect those fees in the *Fees & Deductions* section. You'll see separate areas to collect *Agent Fees & Deductions* for each agent on the transaction and *Broker Fees & Deductions*.

Fees & Deductions

🏠
**Broker's Fees & Deductions**

Earnest Money Deposit (withheld at closing) \$

[+ Collect Client Fee](#)

---

Enter deduction for brokerage
▼

👤
**Daniel Lorence - Fees & Deductions**

|                             |   |
|-----------------------------|---|
| Transaction Fee             | \$  |
| Advertising Fee             | \$  |
| Administrative fee          | \$  |
| E&O                         | \$100.00  |
| Rental Commission           | \$  |
| Transaction Coordinator fee | \$395.00  |
| Assistant Fee               | \$  |
| Commission Deferral         | \$  |
| Earnest Money Deduction     | \$  |
| FMLS Fee                    | 1.2% <span style="background-color: #c6e0b4; padding: 0 5px;">%</span> \$ |
| Tax                         | \$  |

[+ Collect Client Fee](#)

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Enter deduction for this agent
▼

Calculate & Continue

## Earnest Money Deposit

In the section for *Broker's Fees & Deductions*, you'll have the option to enter the *Earnest Money Deposit* if you opted to [allow Earnest Money Deposit Deduction](#).

The *Earnest Money Deposit* amount will be deducted from the final amount 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.

To deduct earnest money:

- 1 In the section for *Broker's Fees & Deductions*, enter the *Earnest Money Deposit* amount. Leave blank if your brokerage is not holding earnest money.

🏠
**Broker's Fees & Deductions**

Earnest Money Deposit (withheld at closing)

+ Collect Client Fee

\$1000

Enter deduction for brokerage

## Client Fees

Collect *Client Fees* from the buyer or seller and disburse *Client Fees* to the broker and / or agent on the transaction.

Fees & Deductions

🏠
**Broker's Fees & Deductions**

Earnest Money Deposit (withheld at closing)

+ Collect Client Fee

\$

Enter deduction for brokerage

👤
**Daniel Lorence - Fees & Deductions**

|                             |           |
|-----------------------------|-----------|
| Transaction Fee             | \$        |
| Advertising Fee             | \$        |
| Administrative fee          | \$        |
| E&O                         | \$100.00  |
| Rental Commission           | \$        |
| Transaction Coordinator fee | \$395.00  |
| Assistant Fee               | \$        |
| Commission Deferral         | \$        |
| Earnest Money Deduction     | \$        |
| FMLS Fee                    | 1.2% % \$ |
| Tax                         | \$        |

+ Collect Client Fee

Enter deduction for this agent

Calculate & Continue

## Client Fees Paid to Broker

To collect a client fee paid to the brokerage:

- 1 In the section for *Broker's Fees & Deductions*, click [+ Collect Client Fee].

- 2 Click [- Select payer -], and choose [Buyer] or [Seller].

Broker's Fees & Deductions

Earnest Money Deposit (withheld at closing) \$

- Select payer -

Buyer

Seller

- Select fee -

Buyer Commissions

Agent Bonus

Transaction Fee

Enter deduction for brokerage

- 3 Click [- Select fee -], then select the *Client Fee Name*.

Broker's Fees & Deductions

Earnest Money Deposit (withheld at closing) \$

Seller

+ Collect Another Client Fee

- Select fee -

Buyer Commissions

Agent Bonus

Transaction Fee

Enter deduction for brokerage

- 4 Enter or edit the default amount as a dollar amount or as a percentage. If a default percentage has been set and you're unsure what it is based on, hover over % to view the % Basis set for the Deduction.

Broker's Fees & Deductions

Earnest Money Deposit (withheld at closing) \$

Transaction Fee (paid by seller) 5%

+ Collect Another Client Fee

Enter deduction for brokerage

% Basis: Sale Price

## Client Fees Paid to Agents

To collect a client fee paid to an agent:

- 1 In the section for *Agent's Fees & Deductions* section, click [+ Collect Client Fee].
- 2 Click [- Select payer -], and choose [Buyer] or [Seller].

3 Click [- Select fee -], then select the *Client Fee Name*.

4 Enter or edit the default amount as a dollar amount or as a percentage. If a default percentage has been set and you're unsure what it is based on, hover over % to view the % Basis set for the Deduction.

## Deductions

Collect *Deductions* from the brokerage or agent's share of commission. *Deductions* can be paid to external people or companies, or to in-house users or agents.

**Fees & Deductions**

🏠
**Broker's Fees & Deductions**

|  |   |
|--|---|
| Earnest Money Deposit (withheld at closing)  | <input type="text" value="\$1,000"/>  |
| Compliance Fee (paid by seller)              | <input style="color: red; font-size: small; text-align: right; vertical-align: bottom; padding-right: 5px;" type="text" value="\$500"/> * |
| <a href="#">+ Collect Another Client Fee</a> |   |

Enter deduction for brokerage
▼

👤
**Daniel Lorence - Fees & Deductions**

|  |   |
|--|---|
| Transaction Fee                              | <input type="text" value="\$"/>   |
| Advertising Fee                              | <input type="text" value="\$"/>   |
| Administrative fee                           | <input type="text" value="\$"/>   |
| E&O  | <input type="text" value="\$100.00"/>   |
| Rental Commission                            | <input type="text" value="\$"/>   |
| Transaction Coordinator fee                  | <input type="text" value="\$395.00"/>   |
| Assistant Fee                                | <input type="text" value="\$"/>   |
| Commission Deferral                          | <input type="text" value="\$"/>   |
| Earnest Money Deduction                      | <input type="text" value="\$"/>   |
| FMLS Fee                                     | <input type="text" value="1.2%"/> <input style="background-color: #90ee90; border: 1px solid #007bff; padding: 2px 5px; font-size: small; vertical-align: middle;" type="button" value="%"/> <input style="border: 1px solid #007bff; padding: 2px 5px; font-size: small; vertical-align: middle;" type="button" value="\$"/> |
| Tax  | <input type="text" value="\$"/>   |
| Agent Bonus (paid by seller)                 | <input style="color: red; font-size: small; text-align: right; vertical-align: bottom; padding-right: 5px;" type="text" value="\$100"/> *   |
| <a href="#">+ Collect Another Client Fee</a> |   |

Enter deduction for this agent
▼

### Deductions Paid by Broker

To collect a *Deduction* from the brokerage's share of commission:

- 1
 In the section for *Broker's Fees & Deductions*, click [**Enter deduction for brokerage**].
- 2
 Select the ***Deduction Name*** from the dropdown. If a default amount has been set for the deduction type, the amount will be pre-populated.



**Broker's Fees & Deductions**

Earnest Money Deposit (withheld at closing)

[+ Collect Client Fee](#)

Enter deduction for brokerage

- Photographer's Fee
- Seller Concessions
- Charitable Contribution

- 3 Enter or edit the default amount as a dollar amount or as a percentage. If a default percentage has been set and you're unsure what it is based on, hover over % to view the % Basis set for the *Deduction*.

**George Payne - Fees & Deductions**

Transaction Fee

E & O

Marketing Fee  % \$

Tax

[+ Collect Client Fee](#)

Charitable Contribution  % \$

Payable to

external  in-house

- Enter another deduction for this agent -

- 4 Select who the deduction should be paid to. *Deductions* can be paid to external people or companies, or to in-house agents or users.

**George Payne - Fees & Deductions**

Transaction Fee: \$100.00

E & O: \$

Marketing Fee: 3% % \$

Tax: \$

+ Collect Client Fee

Charitable Contribution: 2% \* % \$

Payable to: Payee Name & Address \*

external ✓ | in-house

- Enter another deduction for this agent -

- To pay the deduction to an external person or company select [external], and enter the payee name and address into the *Payable To* field.
- To pay the deduction to an in-house agent or user select [in-house], type the user's name, and select them from the dropdown list.

### Deductions Paid by Agents

To collect a *Deduction* from the agent's share of commission:

- 1 In the section for *Agent Fees & Deductions*, click [Enter deduction for this agent].
- 2 Select the *Deduction Name* from the dropdown. If a default amount has been set for the deduction type, the amount will be pre-populated.

**George Payne - Fees & Deductions**

Transaction Fee: \$100.00

E & O: \$

Marketing Fee: 3% % \$

Tax: \$

Transaction Fee (paid by buyer): 5% \* % \$

+ Collect Another Client Fee

- Enter deductions for this agent -

- Photographer's Fee
- Seller Concessions
- Charitable Contribution

- 3 Enter or edit the default amount as a dollar amount or as a percentage. If a default percentage has been set and you're unsure what it is based on, hover over % to view the % Basis set for the Deduction.

The screenshot shows the 'George Payne - Fees & Deductions' form. The 'Charitable Contribution' field is highlighted with a blue box and contains '2%'. A tooltip is visible over the percentage icon, stating '% Basis: Sale Price'. Other fields include Transaction Fee (\$100.00), E & O (\$), Marketing Fee (3%), Tax (\$), and Transaction Fee (paid by buyer) (5%). There are also buttons for 'external' and 'in-house' under the 'Payable to' section.

- 4 Select who the deduction should be paid to. Deductions can be paid to external people or companies, or to in-house agents or users.

This screenshot is identical to the previous one, but the 'external' button under the 'Payable to' section is now selected and highlighted with a blue box. The 'in-house' button is unselected. The 'Charitable Contribution' field still shows '2%'.

- To pay the deduction to an external person or company, select [external], enter the payee name and address into the *Payable To* field.
- To pay the deduction to an in-house agent or user, select [in-house], type the user's name, and select them from the list.

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## Agent Fees

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Once you've set up *Agent Fees*, each *Agent Fee* will automatically populate for each agent on the transaction along with any corresponding default dollar or percentage amounts. [Learn more about Agent Fees](#) →

Here's an example list of *Agent Fees*:

| Daniel Lorence - Fees & Deductions           |           |
|--|-----------|
| Transaction Fee                              | \$        |
| Advertising Fee                              | \$        |
| Administrative fee                           | \$        |
| E&O  | \$100.00  |
| Rental Commission                            | \$        |
| Transaction Coordinator fee                  | \$395.00  |
| Assistant Fee                                | \$        |
| Commission Deferral                          | \$        |
| Earnest Money Deduction                      | \$        |
| FMLS Fee                                     | 1.2% % \$ |
| Tax  | \$        |
| Agent Bonus (paid by seller)                 | \$100 *   |
| <a href="#">+ Collect Another Client Fee</a> |           |
| Enter deduction for this agent               |           |
| <a href="#">Calculate &amp; Continue</a>     |           |

To deduct *Agent Fees*:

- 1 **Confirm the default amounts or enter a new amount for any applicable *Agent Fee*.** If a default percentage is set for the fee and you're unsure what it is based on, hover over % to view the % *Basis* set for the *Agent Fee*.

|          |           |
|----------|-----------|
| FMLS Fee | 1.2% % \$ |
| Tax      | \$        |

---

### Calculate & Continue

---

To calculate the commission amounts and move on to the next step:

- 1 **Click [*Calculate & Continue*].**

|                                 |           |
|---------------------------------|-----------|
| Commission Deferral             | \$        |
| Earnest Money Deduction         | \$        |
| FMLS Fee                        | 1.2% % \$ |
| Tax                             | \$        |
| + Collect Client Fee            |           |
| Enter deduction for this agent  |           |
| <b>Calculate &amp; Continue</b> |           |

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### Referral Commissions

**Jennifer Howell, Referral**  
 Company: H Town Realty / 128 Wilshire Blvd. Suite 100, Dallas TX 77384

## Referral Commissions

You will only see the *Referral Commission* section if you entered a *Referral Percentage* in the *Escrow & Sale Info* section. Referrals can either be paid to external recipients or to in-house agents.

### External Referral

To distribute *Referral Commission* to an external referral:

- 1 Select the number of external referrals you are paying.
- 2 Enter the *Referral Company*. Enter either the referral's first and last name, or company's name.
- 3 Enter the *Referral Address*.

### Referral Commissions

**Jennifer Howell, Referral**  
 Company: H Town Realty / 128 Wilshire Blvd. Suite 100, Dallas TX 77384  
 Phone: 555-555-5555  
 Email: howell@paperlesspipeline.com

How many referrers will share the commission amount? 1

**Jennifer Howell's Referral Commission**

Company: Jennifer Howell \*

Address: H Town Realty  
 128 Wilshire Blvd. Suite 100  
 Dallas TX 77384 \*

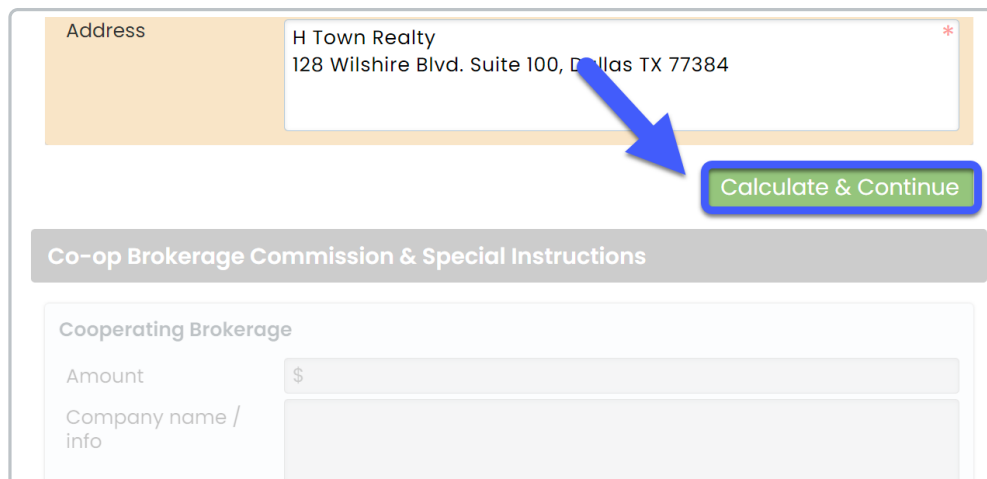
Contacts added to your transaction with the role, "Referral" or "Referrer" will be display at the top of the *Referral Section* so you can easily copy and paste that information.

## Calculate & Continue

---

To calculate the commission amounts and move on to the next step:

- 1 Click [*Calculate & Continue*].



The screenshot shows a web form with the following elements:

- Address field:** Labeled "Address" on the left, containing the text "H Town Realty" and "128 Wilshire Blvd. Suite 100, Dallas TX 77384". A red asterisk is visible in the top right corner of the field.
- Calculate & Continue button:** A green button with a blue border, located below the address field. A blue arrow points from the address field to this button.
- Co-op Brokerage Commission & Special Instructions section:** A grey header bar above a white form area.
- Cooperating Brokerage section:** A white form area with two input fields:
  - Amount:** A field with a "\$" symbol on the left.
  - Company name / info:** A larger text input field.

## In-house Referral

---

To disburse *Referral Commission* to an in-house agent or user:

- 1 Start typing the agent's name in the search box.
- 2 Select the agent's name from the dropdown list.
- 3 Enter the *agent's share of referral commission* as a percentage or flat dollar amount. If the agent's default *Commission Percentage* is the agent's default *Commission Percentage* is set in their profile, that amount will be automatically populated and can be edited as needed.
- 4 Enter or edit any *Agent Fee* amounts. If you don't collect *Agent Fees* from referral recipients, delete the default amounts.

**Referral Commissions**

**Jennifer Howell**, Referral

Company: **H Town Realty / 128 Wilshire Blvd. Suite 100, Dallas TX 77384**

Phone: **555-555-5555**

Email: **howell@paperlesspipeline.com**

**In-House Referral**

Search for referring agent by name

✕ \*

Agent's share of referral commission

\* % \$

|                             |   |
|-----------------------------|---|
| Transaction Fee             | <input type="text" value="\$"/>   |
| Advertising Fee             | <input type="text" value="\$"/>   |
| Administrative fee          | <input type="text" value="\$"/>   |
| E&O                         | <input type="text" value="\$100.00"/>                                     |
| Rental Commission           | <input type="text" value="\$"/>   |
| Transaction Coordinator fee | <input type="text" value="\$395.00"/>                                     |
| Assistant Fee               | <input type="text" value="\$"/>   |
| Commission Deferral         | <input type="text" value="\$"/>   |
| Earnest Money Deduction     | <input type="text" value="\$"/>   |
| FMLS Fee                    | <input type="text" value="1.2%"/> <span style="float: right;">% \$</span> |
| Tax                         | <input type="text" value="\$"/>   |

**Calculate & Continue**

To calculate the commission amounts and move on to the next step:

- 1 Click [**Calculate & Continue**] to calculate the commission amounts.

FMLS Fee  %  % \$

Tax

**Calculate & Continue**

**Broker / Agent / Referral Commission Disbursement**

|                  |                     |
|------------------|---------------------|
| Sale price       | <b>\$500,000.00</b> |
| Gross commission | <b>\$17,500.00</b>  |

In the final step of managing commissions, enter any *Co-Op Broker & Special Instructions*

### Co-op Brokerage Commission & Special Instructions

**Cooperating Brokerage**

|                     |   |
|---------------------|---|
| Amount              | \$17,500  |
| Company name / info | Freedom Realty<br>4543 Grove Lane<br>Dallas, TX 73627 |

**CDA instructions (to be shown above Payables)**

CDA Instructions Top

**CDA instructions (to be shown below Payables)**

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

**i** Saving commissions will also generate a Commission Disbursement Authorization.

## Cooperating Brokerage

---

If you'd like the Co-Op Broker's commission to be displayed on your CDA, enter their *Commission Amount* and *Company name / info*.

## CDA Instructions

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If you've [set up CDA Instructions](#), the *CDA instructions* will be pre-populated. Otherwise, enter any *CDA instructions* to be shown above or below payables.

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

## Save Commissions

---

To save commissions and generate a CDA:

- 1 Click [Save Commissions].



**CDA instructions (to be shown below Payables)**

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

**i** Saving commissions will also generate a Commission Disbursement Authorization.

[Save Commissions](#)

## View & Share a CDA

Once you save commissions, the system automatically generates a *Commission Disbursement Authorization*, or *CDA*.

The CDA will include a *Payable* section to instruct Title, Escrow, or the Closing Attorney on how to distribute the payables, along with any *Special Instructions*, and the signature of the authorized signer.

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To view a CDA:

- 1 Scroll down to the *Documents* section. The *Commission Disbursement Authorization* will appear under the *Financial Docs* section.

- 2 To preview the CDA, click the **Document Name**.

Only admins with permission to *Enter Financial Data* or *View Financial Reports* will be able to view the CDA. Agents can view their *Financial Info* and *Commission and Fees Statement* (described below).

## Share the CDA

To share the CDA:

- 1 Click [Note/Email].
- 2 Enter your recipients. [Learn how here](#) →
- 3 Check the box next to the **Commission Disbursement Authorization doc**.

The screenshot shows the 'Note / Email' interface with the following details:

- Recipients:** Staff (5) including Daniel Lorence, Carol Francis, Donald Lakem, Monta Jacobs (admin), Clyde Floyd, and Monta Fleming.
- Subject:** CDA for {{transaction name}}
- Message:** Hi {{contacts:Escrow:first name}}, Attached is the CDA. Thanks.
- Options:** Make this note private, Send me a BCC, Save this message as a reusable template, Append incomplete/completed/overdue tasks to message.
- Attached Docs:** Commission Disbursement Authorization (0.1 MB)
- Document List:** A table with columns for Label, Document Name, Added On, Reviewed, and Entered. The 'Commission Disbursement Authorization' document is checked and highlighted.

| Label                               | Document Name  | Added On     | Reviewed                            | Entered |
|-------------------------------------|--|--------------|-------------------------------------|---------|
| Financial Docs                      | - visible to backoffice admins   |              |                                     |         |
| <input checked="" type="checkbox"/> | Commission Disbursement Authorization  | Apr 15, 2022 |                                     |         |
| -                                   | Listing Docs - visible to listing agents on this transaction and office staff          |              |                                     |         |
|                                     | Information About Brokerage Services   | Aug 5, 2021  | <input checked="" type="checkbox"/> |         |
|                                     | Listing Agreement  | Aug 5, 2021  | <input checked="" type="checkbox"/> |         |
|                                     | NON - PDF DOC  | Dec 2, 2021  |                                     |         |
| -                                   | Sale Docs - visible to listing and selling agents on this transaction and office staff |              |                                     |         |

- 4 Click [Send email].

## View & Download Financial Info

Once you save commissions, the *Financial Info* section will appear on the transaction page. *Financial Info* displays a summary of how the commission was distributed.

You may need to click + to expand or collapse the *Financial Info* section. Pipeline will smartly remember your preference on all transactions you visit from the same device.

The screenshot displays a real estate transaction management interface. On the left is a sidebar with navigation options: View Transaction, Edit Transaction, Upload Docs, Assign Docs, New Offer, Transaction History, Deleted Docs, Received Emails (0), Download Transaction, and Update Commissions. Below this is a 'Checklists' section with a '+59%' completion indicator. Under 'Pending Residential (Listing)', there is a checklist of tasks with due dates: Seller's Disclosure Notice (3/22), Inspection (3/22), Property Inspection Report (3/22), Termite Report (3/22), Appraisal Report (3/22), W-9 for Referring Agent (3/22), Home Warranty Application, Request for Mortgage Information, Closing Disclosure (3/22), Create Closing File Number and Add to MLS Field (3/17), HOA Deadline, and Condo Deadline. A blue arrow points to the '+' icon next to the 'Financial Info' section in the checklist. The main content area shows the transaction details for '65456 Red Barn Lane North Park TX 76374'. It includes a link for email docs and notes, and sections for General, Buyer & Seller, and Sale & Commission. The 'Financial Info' section is currently collapsed, indicated by a '+' icon and a 'download' button. Below it are sections for Listing Agents (Daniel Lorence) and Contacts (Jennifer Howell, Referral).

**65456 Red Barn Lane North Park TX 76374**

Email docs and notes to this transaction: [9430-137318-TX-3994068@docs.paperlesspipeline.com](mailto:9430-137318-TX-3994068@docs.paperlesspipeline.com)

**General**

**Status:** Under Contract **Listed**  
**MLS #:** 2184789 **Accept**  
**Label:** Single Family Residence **Closed**  
**Side:** Listing  
**Location:** Allen

**Buyer & Seller**

**Seller:** Blake Somers  
**Seller Lead Source:** Sphere of Influence  
**Buyer:** Dawn Miller  
**Buyer Lead Source:** Zillow

**Sale & Commission**

**List Price:** \$1,149,000 **Total C**  
**Sale Price:** \$500,000 **Comm**

+ **Financial Info** download

**Listing Agents**

Daniel Lorence [✉ carol+dan@paperlesspipeline.com](mailto:carol+dan@paperlesspipeline.com)

**- 2 Contacts**

Jennifer Howell, **Referral** [✉ howell@paperlesspipeline.com](mailto:howell@paperlesspipeline.com)  
H Town Realty / 128 Wilshire Blvd, Suite 100, Dallas TX 77384

You will also notice a few downloads, including the *Transaction Commission and Fees Statement* and *Commission Statements* for each agent on the transaction, in-house referrals, and any in-house deduction recipients.

**65456 Red Barn Lane North Park TX 76374** Added on Oct 20, 2022 by Carol Francis  
Last updated Apr 19, 2022 by Carol Francis

Email docs and notes to this transaction: [6430-137318-TX-3994068@edocs.paperlesspipeline.com](mailto:6430-137318-TX-3994068@edocs.paperlesspipeline.com)

**General**

Status: Under Contract Listed On: Oct 22, 2021  
 MLS #: 2184789 Accepted On: Mar 17, 2022  
 Label: Single Family Residence Closed On: Mar 25, 2022  
 Side: Listing  
 Location: Allen

**Buyer & Seller**

Seller: Blake Somers  
 Seller Lead Source: Sphere of Influence  
 Buyer: Dawn Miller  
 Buyer Lead Source: Zillow

**Sale & Commission**

List Price: \$1,149,000 Total Commission: \$17,500  
 Sale Price: \$500,000 Commission Summary: 3.5% Listing Commission  
Referral: 25% to H Town Realty

**Financial Info** [download](#)

|                            |              |   |              |
|----------------------------|--------------|---|--------------|
| Sale Price:                | \$500,000.00 | Broker's Split of Commission:             | \$3,148.25   |
| Gross Commission:          | \$17,500.00  | Brokerage Fees + Taxes Collected:         | \$6,495.00   |
| Referral Commission:       | \$4,287.50   | Coffee is for Closers Franchise Fee Owed: | \$350.00     |
| Royalty Fee (off-the-top): | -\$336.92    | Royalty Fee (off-the-top):                | \$336.92     |
|                            |              | Home Warranty:                            | -\$400.00    |
|                            |              | Payable Before Client Fees:               | \$9,930.17   |
|                            |              | Compliance Fee (paid by seller):          | \$500.00     |
|                            |              | Net Payable:                              | \$10,430.17  |
|                            |              | Earnest Money Deposit:                    | (\$1,000.00) |

**Rachel McWhirter** [download](#)

|                              |            |
|------------------------------|------------|
| Flat Commission Amount:      | \$3,644.37 |
| Gross Commission:            | \$3,644.37 |
| Net Commission:              | \$3,644.37 |
| Transaction Coordinator Fee: | \$395.00   |
| Net Payable:                 | \$4,039.37 |

**Daniel Lorence** [download](#)

|                               |             |
|-------------------------------|-------------|
| Listing Commission:           | \$12,525.58 |
| Listing Agent / Broker Split: | 80% / 20%   |
| Gross Commission:             | \$10,020.46 |
| E&C:                          | -\$100.00   |
| Transaction Coordinator fee:  | -\$395.00   |
| FMLS Fee:                     | -\$6,000.00 |
| Net Commission:               | \$3,525.46  |
| Transaction Coordinator Fee:  | -\$395.00   |
| Payable Before Client Fees:   | \$3,130.46  |
| Agent Bonus (paid by seller): | \$100.00    |
| Net Payable:                  | \$3,230.46  |

**Listing Agent**

Agents can view and download only their own *Financial Info*. Admins with permission to *Enter Financial Data* or *View Financial Reports* will be able to view and download all *Financial Info*.

## Transaction Commission & Fees Statement

The *Transaction Commissions & Fees Statement* will summarize all commission and fees paid.

To download the *Transaction Commissions and Fees statement*:

- 1 Click [download] at the top of the *Financial Info* section.

## Agent Commission & Fees Statement

A *Commission & Fees Statement* will be generated for each agent who received commission on the transaction. It will include the agent's *Net Payable* amount, a breakdown of their commission and fees, and a year-to-date summary at the top.

To download an agent's *Commission Statement*:

- 1 Click [download] next to the agent's name.

# View & Download Reports

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To view and download reports:

- 1 Click [Reports] from the top menu. The *Commission Summary* page will display company-wide production numbers.
- 2 Click your desired financial report from the left menu.

| April 2022       |        | March 2022       |              | 2022 Total       |              | 2021 Total       |                 |
|------------------|--------|------------------|--------------|------------------|--------------|------------------|-----------------|
| <b>Pending</b> 0 |        | <b>Pending</b> 1 |              | <b>Pending</b> 1 |              | <b>Pending</b> 8 |                 |
| Sales Volume     | \$0.00 | Sales Volume     | \$500,000.00 | Sales Volume     | \$500,000.00 | Sales Volume     | \$3,944,499.00  |
| Gross            | \$0.00 | Gross            | \$17,500.00  | Gross            | \$17,500.00  | Gross            | \$13,834.97     |
| Referral         | \$0.00 | Referral         | \$0.00       | Referral         | \$0.00       | Referral         | \$5,450.00      |
| Broker           | \$0.00 | Broker           | \$3,148.25   | Broker           | \$3,148.25   | Broker           | \$21,202.69     |
| Agents           | \$0.00 | Agents           | \$13,664.83  | Agents           | \$13,664.83  | Agents           | \$103,072.98    |
| Agent Fees       | \$0.00 | Agent Fees       | \$6,495.00   | Agent Fees       | \$6,495.00   | Agent Fees       | \$14,024.00     |
| <b>Closed</b> 0  |        | <b>Closed</b> 0  |              | <b>Closed</b> 0  |              | <b>Closed</b> 28 |                 |
| Sales Volume     | \$0.00 | Sales Volume     | \$0.00       | Sales Volume     | \$0.00       | Sales Volume     | \$45,011,356.00 |
| Gross            | \$0.00 | Gross            | \$0.00       | Gross            | \$0.00       | Gross            | \$1,247,153.77  |
| Referral         | \$0.00 | Referral         | \$0.00       | Referral         | \$0.00       | Referral         | \$11,105.49     |
| Broker           | \$0.00 | Broker           | \$0.00       | Broker           | \$0.00       | Broker           | \$181,928.82    |
| Agents           | \$0.00 | Agents           | \$0.00       | Agents           | \$0.00       | Agents           | \$10,421,441.55 |
| Agent Fees       | \$0.00 | Agent Fees       | \$0.00       | Agent Fees       | \$0.00       | Agent Fees       | \$11,551.22     |

All reports on the left menu (except *Listing and Pending Inventory Reports*) only include commission figures for transactions where commissions have been entered that are currently in a *Closed* status (except *Pending Commission Reports*, which includes *Pending* transactions).

Only admins with permission to *Enter Financial Data* or *View Financial Reports* will be able to view

reports on the *Reports* page. Agents can view their own *Personal Commissions Report* from their *Personal Profile*. [Learn more about Personal Commissions Reports for Agents →](#)

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