What's New (April 2, 2017)

Quickly search a transaction's documents: There's a new search option above the documents area of every transaction. Use it to instantly locate a document.

And many more small improvements.

Read the blog post for more info →

COMMISSION MODULE

Agents can receive a monthly commission report that summarizes their year-to-date and last month's production numbers: Turn this feature on or off from the Admin Settings page using the checkbox "Email monthly production summary to agents".

Generate reports based on any date range: From a report's "period" drop-down list, select the option "Custom Date Range", then specify the desired start and end dates.

Search transactions based on whether they have commission data entered or not: From the Transaction's page, go to the Advanced Search section and use the new "Commissions" filter.

The "Generate CDA" option has been renamed to Manage/Update Commissions: How you enter a transaction's commission data hasn't changed. Just the menu option now appears as either Manage Commissions or Update Commissions.

Rename franchise fee to match your company's naming conventions: If your office pays a franchise fee but calls it by a different name, now you can specify that name.