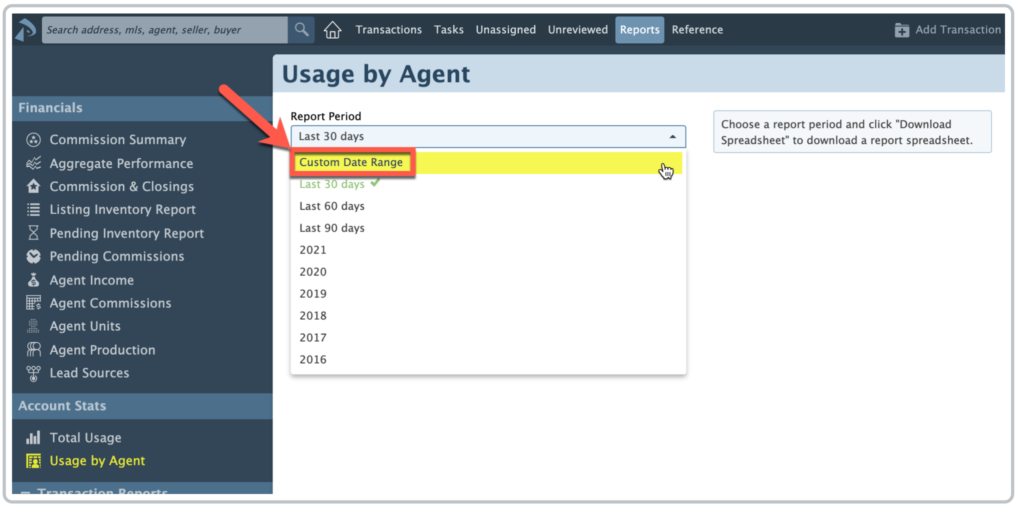
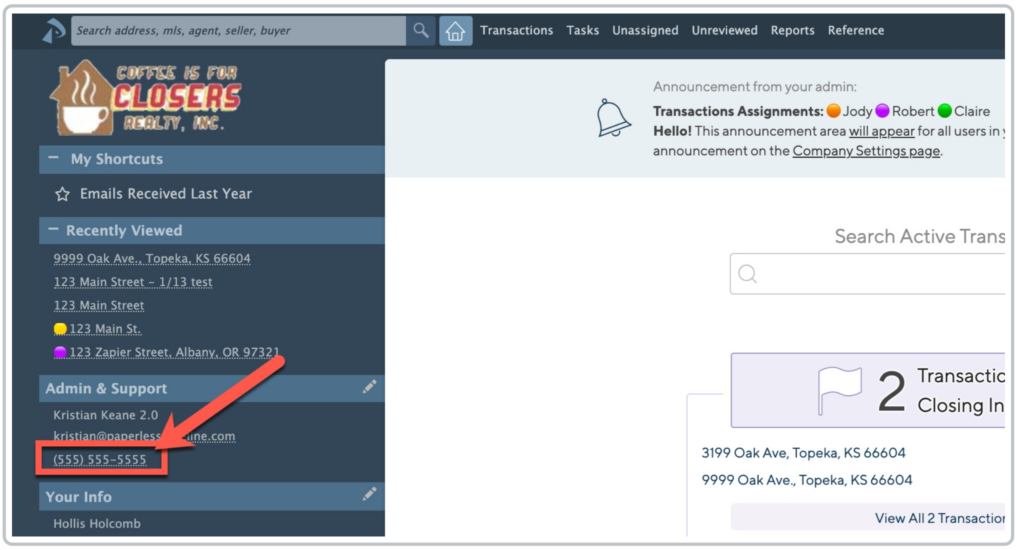
What's New (June 13, 2021)

Filter Usage by Agent Report by date range: Pull your team's Pipeline activity based on any date range you specify. Pre-set date periods still exist to continue to allow you quick and easy access to activity for those common date ranges.



Learn more about the Usage by Agent Report here →

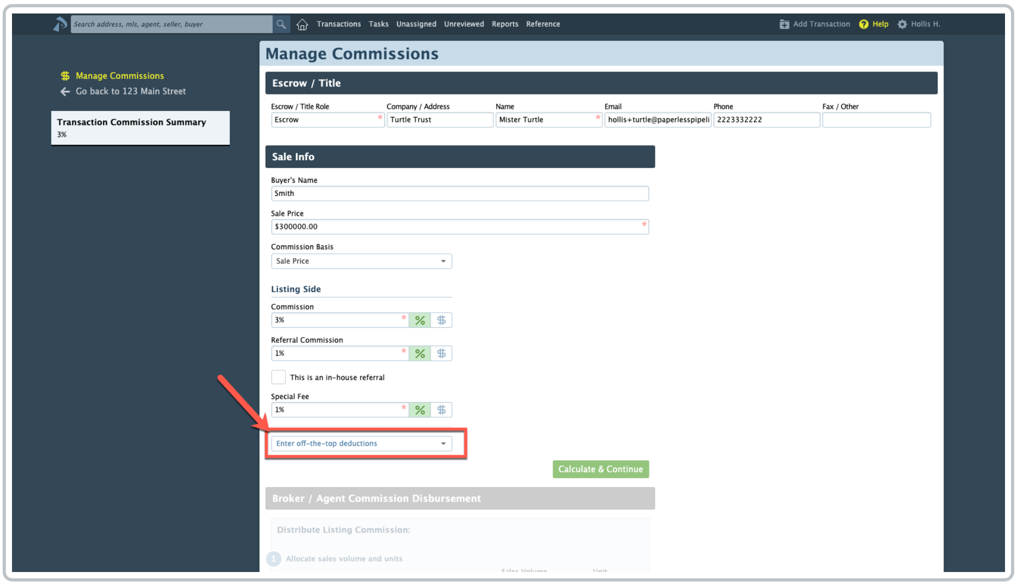
Prominently display your Admin contact's phone number in Pipeline: Add your main admin's phone number under Company Settings. It will then be displayed prominently on the left menu of the Home page where your agents will have easy access to it and your admin.



Learn more about Admin & Support Contact info here →

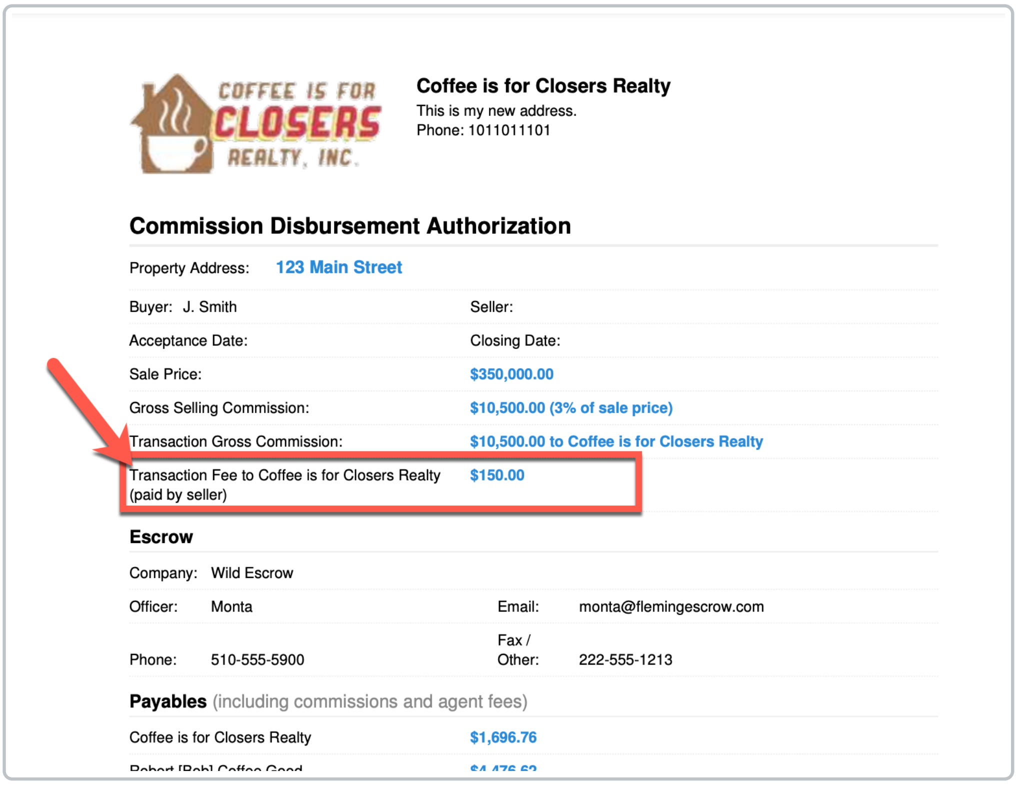
COMMISSION MODULE

Manage off-the-top deductions: Deductions can now be taken off-the-top (OTT) of commissions (before broker/agent splits) when managing commissions on a transaction. This will allow the broker and agent gross commissions to consider those deductions and accurately reflect their true amounts. These OTT deductions can be a flat dollar amount or based on a percentage of sales price or gross commission. Like other deductions, you can set these OTT deduction amounts to have default values or enter them at the time of CDA generation. OTT deductions may be paid to the broker, agents, or external recipients and will be reflected on all appropriate reports.



Learn more about Off-the-Top (OTT) Deductions here →

Client Fee details re-positioned on CDAs: When client fees exist on a CDA, they will now be itemized in the Commission Disbursement Authorization section and reflected as a single payable amount in the Payables section.


COFFEE IS FOR CLOSERS REALTY, INC.

Coffee is for Closers Realty
This is my new address.
Phone: 1011011101

Commission Disbursement Authorization

Property Address: 123 Main Street

Buyer: J. Smith	Seller:
Acceptance Date:	Closing Date:
Sale Price:	$350,000.00
Gross Selling Commission:	$10,500.00 (3% of sale price)
Transaction Gross Commission:	$10,500.00 to Coffee is for Closers Realty
Transaction Fee to Coffee is for Closers Realty (paid by seller)	$150.00

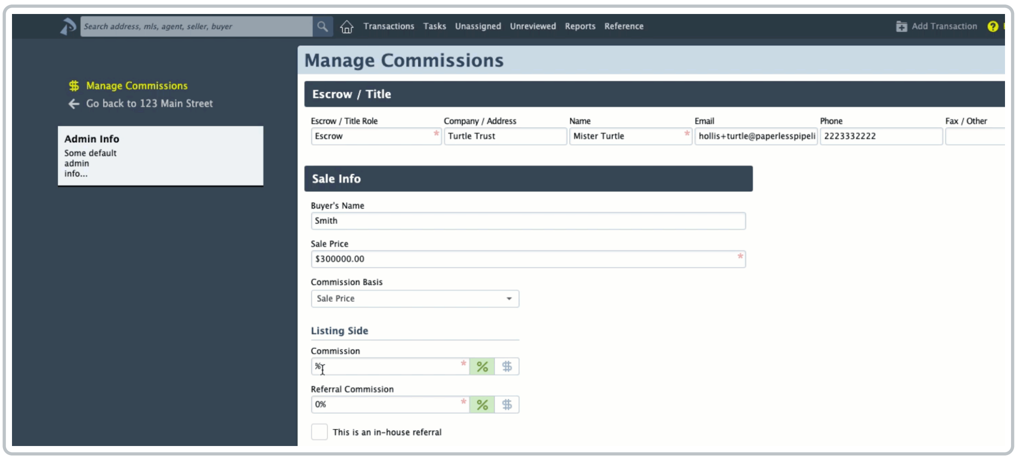
Escrow

Company:	Wild Escrow		
Officer:	Monta	Email:	monta@flemingescrow.com
Phone:	510-555-5900	Fax / Other:	222-555-1213

Payables (including commissions and agent fees)

Coffee is for Closers Realty	$1,696.76

Speed switch between $ and % when managing commissions: Love keyboard shortcuts that help you breeze through your input process? When you'd like to change the mode of any $ / % toggle field on the Manage Commissions page, include the symbol when entering the number (e.g., $225 or 75%), and the system will switch modes automatically. Give it a try!



[Learn more super user tips & tricks here →]

Commission split thresholds updated to be based on Close date: The system will now determine whether a multi-tier commission split threshold has been reached based on the Close date of a transaction rather than the date you're processing the commissions.

Learn more about managing multi-tier commission splits here →

View CDA status on transaction downloads: Your transaction download reports now include a "Has CDA" column so you can easily see which transactions have had their CDAs generated and help you determine if action needs to be taken.

Learn more about downloading transaction spreadsheets here →

Escrow/Title contact and company info added to Commissions & Closings report - The Escrow/title company contact information that's present at the top of the page while Managing Commissions is now included as the furthest right column on the Commissions & Closings report. This addition will allow you to more easily sort, filter, and report on commissions data by Escrow/Title company.

Learn more about the Commissions & Closings Report here →