YTD Pop-up

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Click into an agent's boxes while you're entering commissions and their year-to-date production appears beside you — closings, volume, units, fees, and the commission notes from their profile.

Introduction

Deciding what an agent gets on this deal usually means knowing where they stand on every other one. Whether they've hit their cap, how close they are to a threshold, whether there's a note on their file about a mentor agreement you'd hate to forget on the one transaction it mattered on.

The pop-up puts that beside the box you're typing in. Click into an agent's commission boxes and their year appears: closings, sales volume, units, fees, and the commission notes kept on their profile. You don't leave the transaction, you don't open a report, and you don't have to remember which agent had the arrangement that isn't like everyone else's, which is the part that fails first when a month gets busy.

It's a reading surface, not an editing one. Nothing in the pop-up changes what's on this transaction. It's the context you need to enter the right numbers on it, which means the decision gets made with the agent's whole year in view rather than from memory, at the moment you're actually making it.

How It Works

The pop-up is part of the Manage Commissions workspace. It reads from closed transactions, it follows the agent's fiscal year, and it comes and goes with your cursor.

Where It Appears

It shows up once you reach the *Broker / Agent Commission Disbursement* section while entering or updating commissions, and only after you click inside one of that agent's boxes. It has never opened on its own — if it feels like it stopped appearing automatically, that's the design, not a change.

What It Shows

Everything in the pop-up is that agent's own year-to-date picture:

- Their current commission percent
- Their start date
- Number of closed transactions
- Total sales volume
- Total units, or sides, closed
- Commissions paid to the brokerage, and agent fees paid to the brokerage
- Agent gross commission
- Agent net commission

Commission Notes at the Bottom

Below the figures sits the agent's Commission notes — whatever an admin recorded in the Commission notes field on that agent's user profile. If the section looks empty, it's because nothing has been written there yet.

These notes are admin-only on purpose. They surface in exactly two places: the agent's user profile, and the bottom of this pop-up. They never appear on the transaction itself, where the agent could see them.

Which Year It Counts

The window is the agent's fiscal year. When your company calculates fiscal years from agent start dates, the year runs from the agent's start-date anniversary; otherwise it runs on the calendar year.

The year is picked from the **transaction's Close Date**, not from today's date. So a deal closing in January for an agent whose anniversary falls on January 17 may land in the year that starts on the 17th, and the pop-up will show the range for that year. It's the most common reason a date range looks wrong at first glance.

What Counts Toward the Totals

A transaction contributes to these figures only when it's in a Closed status *and* has commissions entered with a CDA generated. Pending deals don't count, and neither do closed ones nobody has entered commissions on yet.

It Comes and Goes

The pop-up is deliberately temporary — it's tied to the agent whose boxes you're in, so it clears when you move on. That keeps the screen readable when several agents are on the same transaction. There's no way to pin it open, and no version of it on the agent's profile.

View an Agent's Year-to-Date Production

> Bring up an agent's year-to-date figures without leaving the commission you're entering.

> **Who Can Do This**: Master admins, and admins with the "Enter financial data" permission for the transaction's location.

To view an agent's year-to-date production:

1. Open the transaction and click [Manage Commissions] or [Update Commissions] in the left menu.

2. Click [Calculate & Continue] until you reach the *Broker / Agent Commission Disbursement* section.

3. Click inside one of the boxes next to the agent's name.

The agent's year-to-date figures appear beside their row, with their commission notes at the bottom. Click into a different agent's boxes to switch to that agent.

Open an Agent's Commission Info From the Pop-up

> Jump straight from the pop-up to the agent's profile when a split or a note needs changing.

> **Who Can Do This**: Master admins, and admins with the "Enter financial data" permission for the transaction's location.

To open an agent's commission info from the pop-up:

1. Bring up the agent's pop-up by clicking inside one of their boxes in the *Broker / Agent Commission Disbursement* section.

2. Click [Update commission info] in the Commission notes section of the pop-up.

You'll land on that agent's user profile, where their commission split and commission notes live. Saving a change there sends admins an email reminder to look over that agent's pending transactions, in case any of them need their commissions re-entered.

YTD Pop-up FAQ

The YTD Pop-up reads from closed transactions inside the agent's current fiscal year, so what it shows depends on close dates as much as on the agent. Answers to the common questions about zero balances, date ranges, and the commission notes at the bottom.

See YTD Pop-up FAQ