



Knowledge Base Article

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Article ID: 4134
Subject: How to setup and process a referral commission
Last Modified: June, 8, 2009
Applies to: Pro Gold i2 2.0, 3.0

Purpose: A referral commission earned typically results from the original commission closing and is processed as a unique transaction event.

Procedure: Setup/enter a property to process the commission

- **Step 1:** Open a new record and enter the **Address One** field:
 - Recommend using following format: **Ref: property address or name of referral company** if address is unknown (e.g., **Ref: Blue Sky Realty**)
 - Crest clients should use **O/I** category in **Crest EDG** which allows for address to be entered or none at all; when no address info is entered the **Crest EDG** import will populate the **Crest Transaction ID** as the address
- **Step 2:** Enter **Sale Date**, **Projected Close date**, **Sale Price** and **Pending** status:
 - **Sale Date** will typically be the day you received the check
 - **Projected Close Date** will be day you are going to process the transaction
 - **Sales Price** is typically the amount of the check received
- **Step 3:** Enter property type as **Other** or **Exempt** if transaction does not count towards commission level:
 - **Re/Max** clients must use **Referral** box near **Property Type** field in **Properties Tab**
 - If checked, **Volume and Units** of this property are **"not"** included in the **Frames Export file**
 - **To be used when transaction is a referral commission only**
- **Step 4:** Assign agent to side:
 - Typically will be a buyer referral so use **Selling Side** for "all" events
- **Step 5:** Verify **Gross Commission Amount** on the **Comm Tree Tab**:
 - **Gross Comm Amount** on the **Comm Tree Tab** will typically be the **Sale Price** entered (i.e., the amount of the check received)
- **Step 6:** Verify the **Side GCI**:
 - The **Side GCI** will be the **Gross Comm Amount** (you will have to manually override the default calculation)
 - Apply company deductions as necessary (Franchise clients may apply company level franchise deductions)
 - Select the **Auto Calculate** button to calculate the split
- **Step 7:** Go to **Agent Tab** and verify the split results
 - Verify % (Can manually override percentage if the plan split does not apply to this transaction)
 - Verify **Units** and **Volume** (zero out these parameters at this point if the transaction does not apply to production figures)

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- **Step 8:** Process the commission:
 - Return to **Comm Tree Tab** and select the **Process Commissions** button
 - Complete as normal

References: Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

<http://secured.progoldi2.com/webcast.aspx>

- The Enhancement HelpNet links are located on the right side of the web page.

Related articles: N/A

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