



RealtyJuggler Commissions and Referrals



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RealOrganized™, Inc.

Organizational Software for Real Estate

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Commissions and Other Income



RealtyJuggler allows you to track your commissions and other income. A summary of this information is available by clicking on the Income icon on the Main screen. This Income screen can be filtered in two ways. The first is by selecting from the **Show:** drop-down in the upper-right corner of the screen. The second is by clicking on one of the date range tabs along the top of the screen. You can sort by any column, by clicking on the column heading.

Commission entries are automatically generated from your Buyer, Listing, and Closing records. Other income can be added by clicking on the "New Other Income" button at the top of the screen.

Items in red are estimated. For example, Buyer records have estimated commission based upon the price range that the buyer is looking at. Once you have picked up your commission check, the commission amount changes from red to black.

Commission calculations take into account any referral fees that you pay.

For referrals that you have made, you have two options:

- You can enter the referral income as Other Income, or
- You can enter a Buyer, Listing or Closing record and enter a status of GaveReferral.

Date ▲	Record Info	Sale \$	Income	Status
Nov 29	Other Income			
No Date	Sell Side Closing Andoras, Tristan 876 Sycamore Street		\$0.00 gross \$0.00 net	Under Contract
No Date	Buy Side Closing			Under Contract
No Date	Listing Anderson, Andrew 123 main street	\$150,000		Active
No Date	Buyer Abbott, Craig	\$300,000	\$9,000.00 gross \$9,000.00 net	Active
No Date	Buyer			Active

Estimated information is marked **bold and in red**. To finalize Income, fill in the Received Commission/Income date in the details screen.
For Commission calculations, create a Buyer, Listing, or Closing record and fill in the Commission tab.

Total Pending Gross Income: \$9,000.00
Total Pending Net Income: \$9,000.00

Total Received Gross Income: \$0.00
Total Received Net Income: \$0.00

Total Number of [Sides](#): 0
[Sales Volume](#): \$0.00
Average Net Income / Side: \$0.00

The final result is a comprehensive view of your income and anticipated income.

You can export this information to a CSV file, which can be viewed in Microsoft Excel. This is useful for tax preparations and for doing detailed analysis of your data.

Other Income

New Other Income

To add an income other than a Commission, click on the "New Other Income" button from the Commission screen.

This screen allows you to enter any miscellaneous other income that you would like to track.

You should fill in the "Received Other Income Check" field with the date that you were paid. By doing that, the Income summary screen will change that income value from estimated to actual. More information on tracking income and commissions can be found in Video Tutorial 26.

The screenshot shows a web form for entering 'Other Income'. At the top, there are three buttons: 'Done', 'Delete Other Income', and 'Duplicate Other Income'. Below these are several input fields: 'Extra Status' (a dropdown menu), 'Date' (set to 'today'), 'Description' (a text box), 'Other Income Amount \$' (a text box), 'Received Other Income Check' (set to 'No Date'), 'Client First Name' (a text box), 'Client Last Name' (a text box), 'Property Address' (a text box), and 'Notes' (a larger text area with a small icon). A blue double arrow button is located on the right side of the form.

Calculating Commissions

Commission calculations can be rather complex. They also vary based upon brokerage and region. RealtyJuggler has a straightforward calculator that makes it easy to compute both estimated as well as actual commissions. This calculator is available from the Commission tab in any Buyer, Listing, or Closing record.

The screenshot shows a commission calculator form. It features a dropdown menu for 'Graduated Sales Commission' with the value '3.0' and the text '(Other Side)' to its right. Below this are two input fields: 'for the first \$ 150000 in sale price' and 'and % 2 for the remainder'.

To compute your commission, simply fill in the blanks and click on the "Calculate Net Commission" button. The commission computations are done in the order that the fields are displayed.

There are several drop-down menus, which allow you to modify whether individual computations should be done as a % or fixed dollar value.

If you fill in a referral fee value, additional fields will appear allowing you to specify the referral direction.

The Commission calculator has several options for the commission rate. In the simplest case, you can fill in a percentage. However, for some situations, you may need to enter a graduated sales commission. If you need to do that, change the "Sales Commission %" drop-down menu to "Graduated Sales Commission%". By doing that, two additional fields appear. Fill in these fields for a two-tiered graduated sales commission.

When you are looking at the Commission tab for a Closing, you will see a Received Commission Check date field. This date should be filled in once you have received your commission check. More information on tracking income and commissions can be found in Video Tutorial 28.

NOTE: If you want to zero a value out, use the value 0. If you empty a field out, we will load default values from your preferences.

Commission Defaults

Most agents have a fixed set of default values for their commission calculations, such as sales commission amount, split, and franchise fee amount. To enter your own default values, go to the **Main:Settings:Preferences:Commissions** section of RealtyJuggler.

From there, you can fill in the default values that make sense for your situation. You can override these defaults for any individual deal. These values are simply the default starting point that your Commission calculator uses at first.

Sales Commission %	3.0
Your Split %	100
Agent & Broker Split Franchise Fee of:	6 %
Other Deduction \$	
Other Deduction \$	

International and Canadian Calculations

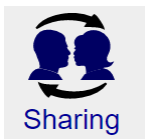
There are a number of settings that non-US real estate agents will find useful. When you sign up for RealtyJuggler, make sure to specify your country accurately as some fields will only be available for non-US customers while still other fields will only be available to Canadian customers. You can see which country you have selected by clicking on the Account link in the upper-right corner of the screen.

Received Commission Check: [today](#)

Commission Tax % (Net)	6.00	as a % of Net Commission
Total Commission Tax \$ 253.80		
Paid Commission Tax \$ No Date		

If you need to track commission taxes, you can fill in the appropriate value for your deals at the bottom of the Commission screen. An automatic task will remind Canadian agents to pay their commission taxes.

Limiting Assistant Access to Income Information



You can share your information with assistants and partners by going to the **Main:Settings:Sharing** section of RealtyJuggler from your master account. From there, simply add the email address of any other RealtyJuggler accounts that you would like to allow access to your information into the bottom fields and follow the instructions on that screen.

Before adding an email address for sharing, make sure that a RealtyJuggler account has been created using that email address.

<input type="text"/>	Read+Write+Delete+Export	Show	Show	No
<input type="button" value="Update"/>	<<<<<==== CLICK UPDATE BUTTON TO SAVE			

If you would like to permit an assistant to see the general deal information but not see income and expenses, select from the appropriate drop-down menus to limit access. More information on tracking income and commissions can be found in Video Tutorial 08.

Exporting Commissions and Income



You can export your Commissions and Income by going to the **Main:Settings:Export** section of RealtyJuggler. The information exported can be opened using any spreadsheet program, such as Microsoft Excel.

This information is useful when preparing your taxes. You can also use this information to do detailed analysis of trends using third party analytical tools, such as Excel. More information on tracking income and commissions can be found in Vieo Tutorial 26.

Done

Data to Export: Income

Format: Comma Separated Values (.csv)

Year: All

Export

Referrals and Lead Generation

Building a pipeline of deals takes time and patience. Leads need to be generated and cultivated. Some leads may not bear fruit for months or even years. The starting point of every agent's pipeline is leads from marketing activities, referrals from past clients, and networking. RealtyJuggler allows you to track these activities and determine what is working and what is not. You can track:

- Leads that were generated from your marketing activities
- Referrals you have received
- Referrals that you have provided to other realtors

All of this is done efficiently, allowing you to focus your energies on what works and abandon or modify approaches that fail to produce results.

Tracking the Source of your Leads / Referrals

The first step for tracking leads is to fill in the Referral Source and Source info fields for each of your Prospect records. The Prospect Source field should contain the general source of that lead. The Source Info field can provide specific information, such as the name of the referral.

Referred By: Website Map

Buyer, Listing, Closing, and Rental records also have the Source and Source Info fields, however these fields are located in the **Main:Closing:Parties:Party** section of the record.

Contact records have a Referred By: field. This field is a combination of the Referral Source and Source Info fields. This field matches with the Microsoft Outlook field of the same name allowing for synchronization of this information with Microsoft Outlook.

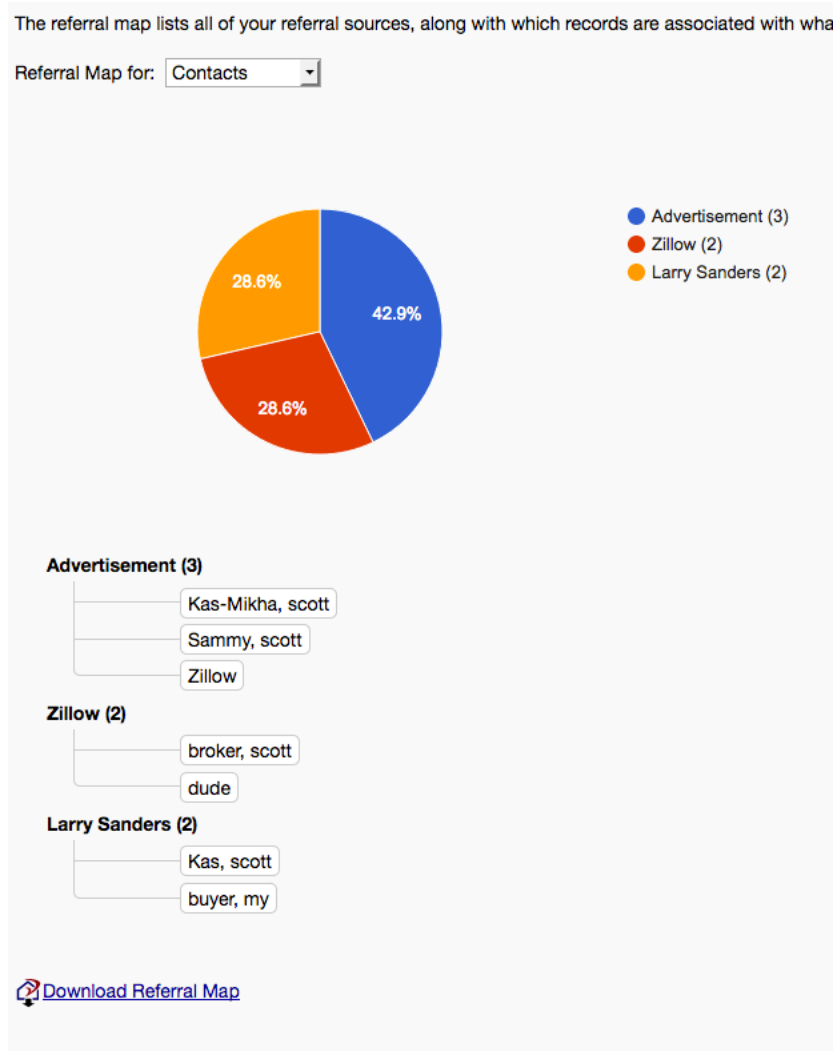
You can edit the list of lead sources by going to **Main:Settings:Preferences:General**. Scroll down to the Lead Sources text field and enter one lead source per line. If you have an uncommon lead source, you do not need to

enter it into the master list. Instead you can simply type the source into the Referred By text field instead of picking from the yellow drop-down.

Referral Map

Referred By: ▼ Referral Adams, Sam [Map](#) On
Advertisement

Once you have entered the Referred By / Referral Source for several Prospects, Buyers, Listings, Closings, or Contacts you can visually review what is working for you and what is not by clicking on the Map link to the right of the Referred By / Referral Source fields. This link takes you to a Referral Map that displays a pie chart and tree view of your referral sources.



If you click on the name of the lead, you will go to that record in RealtyJuggler.

This map provides an excellent way to determine what's working and what isn't. You can view this map for each of your databases.

You can also view this map at any time by going to **Main:Goals:Referral Map**.

Getting Leads from Agents and other People

First Name: ▼ Larry
Last Name: **LookUp Contact**
se ▼ **Add to Contacts**
Company: **Help**

Referrals from other agents, and friends have always had a special place in the hearts of experienced realtors. These leads need special attention, as they require cultivation, and in some cases, financial compensation.

To assist with this extra tracking, go into your deal record (Prospect, Buyer, Listing, or Closing) and click on the Parties tab. From there, look for a party with a Role of Referral. If one does not yet exist, create one by clicking on the "New Party" button at the top of the screen.

If the person who provided you the referral is already in your Contacts database, click on the "First Name" label and select from the "LookUp Contact" menu item from the yellow drop-down menu. You can then find the appropriate contact and link to them.

Similarly, if you want to add the person who made the referral to your Contacts database, you would fill in the contact information and select the "Add To Contacts" menu item. *It is to your advantage to have every person who has provided a lead to you in your Contacts database.*

Role: Referral ▼
Agent:
Direction: Gave Client Referral (Other Agent Pays You) ▼
Referral Fee % ▼
Contract: None ▼
Last Contact: [No Date](#)
Contact again in: ▼ days

Next, you will want to select "Referral" for the role.

If you received a referral from another agent, check off the "Agent" check box. Additional fields appear for agents, allowing you to track the direction of the referral as well as any referral fee that you have agreed to. By entering this information here, your commission calculation will automatically be updated and reflect any referral payment due.

Providing Referrals to Other Agents

Providing referrals to other agents can be financially rewarding. RealtyJuggler helps you keep an eye on the deal to make sure that the referral results in a happy client. Additionally, you can track expected referral fees to make sure that they are paid in a timely manner. Here are the steps to set up a referral to another agent:

1. Create a new Buyer or Listing record and set the status of that record to "GaveReferral".
2. Click on the Commission tab and enter commission information for the deal.
3. Click on the Parties tab. From there, look for a party with a Role of Buy Agent (or sell Agent) that represents the agent you have provided the referral to. If a party of that Role does not yet exist, create one by clicking on the "New Party" button at the top of the screen. If the agent is already in your Contacts database, click on the "First Name" label and select from the "LookUp Contact" menu item from the yellow drop-down menu. You can then find the appropriate contact and link to them. Similarly, if you want to add the agent to your Contacts database, you would fill in the contact information and select "Add To Contacts" menu item.
4. You probably will want to enter a value contact every ___ days where you are reminded to contact the agent periodically.
5. Eventually, you will transfer the Buyer or Listing record to Closing by clicking on the Transfer tab to the left. In each case, the Income section of RealtyJuggler will reflect the income from your referral fee.

Your Side	Other Side
Sale Price \$	150000
Concession \$	
Calculate Commission:	Before Concession
Sales Commission %	3 (Your Side)
Commission Deduction \$	
Your Gross Commission \$	4500.00
Referral:	Received Client Referral (You Pay Other Agent)
Referral Fee %	
Referral \$	0.00
Agent & Broker Split Franchise Fee of:	6 %
Franchise Fee Amount \$	270.00
Pre-Split Deduction \$	
Your Split %	100
Your Split \$	4230.00
Other Deduction \$	
Other Deduction \$	
Pre-Net Deduction \$	
Your Net Commission \$	4230.00

First Name: ▼ Larry

Last Name: se ▼

Company: ▼

LookUp Contact

Add to Contacts

Help

By following these steps, you will be able to track the referral you have given with as much detail as you wish. You can enter closing dates, sales price and additional parties as that information becomes available. Finally, you can calculate your referral fee amount and that information will be displayed in the Income section of RealtyJuggler. More information on tracking referrals can be found in Video Tutorial 48.

Parties and BackLinks

When you link a Referral, Buy Agent, or Sell Agent party to your contacts list by clicking on the "First Name:" label and selecting "LookUp Contacts" menu item from the yellow menu, you are saving yourself the trouble of having to look for their contact information. You are also providing for an easy way to track all of the deals that person has been involved in.



The screenshot shows a user interface with a left-hand navigation menu and a main content area. The navigation menu includes options like 'Print', 'General', 'Address (1)', 'Photo', 'Service Report', 'Mail', 'Mailing Label', 'Tasks', 'Appointments', 'Backlinks' (which is highlighted), and 'Transfer'. A 'Return' button is located at the top right of the main area. Below the button, there is a text block explaining that the following list shows records with links to the current record, and that links can be created by clicking on blue drop-down arrows. A table with three columns: 'Database', 'Description', and 'Saved' is displayed. The table contains one row for a 'Buyer' with the name 'Abbott, Craig', spouse 'Abigail', and address '15711 Park Way, Tualitan, Idaho 97070'. The 'Saved' date is 'Nov 29'. Below the table, there is a video icon and a link to 'Tutorial 18'.

Database ▲	Description	Saved
Buyer	Abbott, Craig Spouse: Abigail 15711 Park Way Tualitan, Idaho 97070	Nov 29

For example, let's say you have worked with a particular loan office on a number of deals. In some cases, these have been referrals but in others, the loan officer has been the Loan Officer. You can view all of the deals that this loan officer has been involved with by going to the contact record of the loan officer and clicking on the "BackLinks" tab on the left side of the screen. From there you will see a summary of every deal that the loan officer has been involved with. You can click on any of these summary lines to go to the record.

The ability to track relationships between Contacts and deals provides a valuable tool for you to understand which of your contacts are providing the most value, and which relationships you should deepen and cultivate. This, along with the referral word map, provides valuable insight into what is working for you in the area of lead generation.

Exporting Data for Advanced Analysis

The **Main:Settings:Export** section of RealtyJuggler provides a means of exporting virtually everything in RealtyJuggler. The format for export is normally CSV format, which is suitable for viewing the data in any spreadsheet program (like Microsoft Excel).

If you have a need to better understand the source of your leads and would like to do a more detailed analysis of the data, you can export Contacts, Prospects, Buyers, Listings, and Closings databases. The contacts database contains a "Referred By" column, which contains details on who referred the lead to you. For each of the other databases, the "Prospect Source" and "Prospect Source Description" columns provide that same information.

Distributing Leads to Others

You can configure RealtyJuggler so that it can be used as a lead clearinghouse where leads can be distributed to assistants and other agents from a central database. To do this, following the steps below:

1. Create a master RealtyJuggler account
2. Create as many assistant/agent accounts as needed
3. Go into each assistant/agent account and go to the **Main:Settings:Sharing** section and add the email address for the master account to the sharing field. Click on the "Update:" button to lock the changes in. You will need to do this for each assistant/agent account.

When the assistant/agent signs in, they will see things just as they have before. When you sign into the master account, you will see a drop-down menu in the upper-right corner of the "Accessing:" screen. This drop-down menu will have several email addresses, one for your master account and one each for each of the assistant accounts. By changing that drop-down menu, you can access each of the assistant accounts to supervise these accounts and monitor progress.

When Prospects are added to the master account, they can be transferred to any of the assistant/agent accounts by going into the Prospect record and clicking on the "Transfer" tab. From there, select from the "record Owner:" drop-down menu to change the ownership of a Prospect from you to one of your assistants.

In this scenario, the master account can see all of the other accounts, and the individual assistant/agent accounts can only access their own information. There are a number of different variations based upon the specific needs that you may have. The above scenario describes the most common configuration for lead distribution. More information on tracking income and commissions can be found in Video Tutorial 09.

Supervising Others

RealtyJuggler has the ability to set up sharing in such a way that supervising broker/agent can keep an eye on any number of assistant accounts. Configuration starts out the same way as described in the *Distributing Leads to Others* section.

Once sharing is configured, the supervisor can flip between each account by selecting from the "Accessing:" menu item in their account's upper-right corner of the screen. The easiest way to get a full view of what's going on with a deal is to go into the individual record and click on the "Service Report" tab. That tab will allow the supervisor to see every email, every printed letter, and all pending and completed tasks. The supervisor can see every note that has been entered as well. That way, you get a comprehensive view of what's going on with the deal.