

Commercial Commission Plan

To activate commercial features in the commercial branch, we want to enable a boolean option in the settings.

Settings → CRM

The screenshot displays the CRM settings interface, specifically the 'Commission' and 'Commercial Commission' sections. The 'Commission' section is at the top, followed by the 'Commercial Commission' section. Both sections contain checkboxes for enabling various features and input fields for fee rates.

Commission	
<input type="checkbox"/> Apply Commission Apply Commission for this company	<input type="checkbox"/> Enable Transaction Coordinator Fee Assign Transaction Coordinator Fee
Signage Fee \$ 250.00	Referral Fee rate Referral Fee Rate 25.00
Co-agent Fee rate Referral Fee Rate 25.00	

Commercial Commission	
<input checked="" type="checkbox"/> Apply Commercial Commission Apply Commission for this company	Referral Fee rate Referral Fee Rate 25.00

As shown in the picture, the CRM settings have two sections: "Commission" for residential and "Commercial Commission" for commercial. Make sure the Commercial feature is only turned on for Commercial companies by enabling the checkbox under the "Commercial Commission" section, note these options will only be visible if the `commission_plan` module is installed.

CRM
Sales
Commission
Leads
Reporting
Configuration
My Business

New
Pipeline
Jenna Test
No Meeting
Quotations
Rentals

New Quotation
New Rental
Won
Lost
Commission
Create Invoice
New
Qualified
Proposition
Won
Lost

Jenna Test

Expected Revenue [?]
\$ 0.00

Probability [?]
at 99.81 %

Contact [?]
Email [?]
Phone [?]

Salesperson [?]
External Referral Agent [?]
External Referral rate [?] 25.00
Co-Agent [?]
Co-Agent Percentage [?] 30.00
Required Approvers [?]
Expected Closing [?] 05/23/2025 ☆☆☆
Tags [?]

Administrator

Opportunity Type [?] Sale →

Opportunity Stage [?]

Property Address [?] 6222 W KOLLMAYER CT

Seller/Landlord Name [?] Landlord 1

Buyer/Tenant Name [?] Landlord 2

Listing/Landlord Agent [?] Agent 1

Buyer/Tenant Rep Agent [?] Agent 2

Internal Notes
Commercial Commission
Commission Report
Extra Information
Signage Information

TRANSACTION DETAILS		
List Price [?]	0.00	Agent Payout Tier [?] 0.00
Total Sales Price [?]	0.00	Total Commission Received by LRE [?] \$ 0.00
Total Commission Received by LRE [?]	\$ 0.00	Errors & Omission Fee [?] \$ 0.00
Marketing Fee [?]	\$ 0.00	E&O Insurance (Agent Portion) [?] \$ 0.00
External Marketing Agency [?]		Commercial Co-Agent Commission [?] \$ 0.00
External Referral Fee [?]	\$ 0.00	Transaction Coordinator Fee [?] \$ 0.00
Balance for Distribution [?]	\$ 0.00	Internal Referral Fee [?] \$ 0.00
		Other Fees [?] \$ 0.00
		Commercial Payable to \$ 0.00

As shown in the image above, the additional pages— Commercial Commission, Commission Report, and the Commission button—will only be visible once the boolean option is enabled.

The fields shown on the Commercial Commission page will change based on the selected opportunity type. In this example, the opportunity type selected is "Sale."

CRM Sales Commission Leads Reporting Configuration My Business

New Pipeline Jenna Test

No Meeting Quotations

New Quotation Commission Create Invoice New 6d Qualified

Jenna Test

Expected Revenue \$0.00

Contact ?

Email ?

Phone ?

Opportunity Type ? Sale

Opportunity Stage ?

Property Address ? 6222 W KOLLMAYER CT

Seller/Landlord Name ? Landlord 1

Buyer/Tenant Name ? Landlord 2

Salesperson ? Administrator

External Referral Agent ?

External Referral rate ? 25.00

Co-Agent ?

Co-Agent Percentage ? 30.00

Required Approvers ?

Expected Closing ? 05/23/2025 ☆☆☆

Commercial Commission Report

- Archive
- Duplicate
- Delete
- Add Properties
- Request Signature
- Mark Lost
- Send email
- Send SMS
- Enrich

From the action button we can print the Commercial Commission Report,

Some Calculations are:-

- 1) External Referral Fee = Total Commission Received by LRE * External Referral rate(in percentage)

Ex:-

Here the Total Commission Received by LRE = 10,000,000.00

External Referral Rate = 25 %

So the External Referral fee = 2500000

Phone [?]		External Referral rate [?]	25.00	
Opportunity Type [?]	Sale	Co-Agent [?]		
Opportunity Stage [?]		Co-Agent Percentage [?]	30.00	
Property Address [?]	6222 W KOLLMAYER CT	Required Approvers [?]		
Seller/Landlord Name [?]	Landlord 1	Expected Closing [?]	05/23/2025	☆☆☆
Buyer/Tenant Name [?]	Landlord 2	Tags [?]		
Listing/Landlord Agent [?]	Agent 1			
Buyer/Tenant Rep Agent [?]	Agent 2			
<div> <div>Internal Notes</div> <div>Commercial Commission</div> <div>Commission Report</div> <div>Extra Information</div> <div>Signage Information</div> </div>				
TRANSACTION DETAILS		Agent Payout Tier [?]	0.00	
List Price [?]	0.00	Total Commission Received by LRE [?]	\$ 0.00	
Total Sales Price [?]	0.00	Errors & Omission Fee [?]	\$ 0.00	
Total Commission Received by LRE [?]	\$ 10,000,000.00	E&O Insurance (Agent Portion) [?]	\$ 0.00	
Marketing Fee [?]	\$ 0.00	Commercial Co-Agent Commission [?]	\$ 2,250,000.00	
External Marketing Agency [?]		Transaction Coordinator Fee [?]	\$ 0.00	
External Referral Fee [?]	\$ 2,500,000.00	Internal Referral Fee [?]	\$ 0.00	
Balance Due	\$ 7,500,000.00	Other Fee [?]	\$ 0.00	

2) Balance For Distribution = Total Commission Received by LRE - Marketing Fee - External Referral fee

Ex:-

Here,

The Total Commission Received by LRE = 10,000,000.00

Marketing Fee = 100

External Referral fee = 2500000

So, Balance For Distribution = 7499900

Commission to Lange Real Estate

Total Commission Received by LRE:	\$ 10,000,000.00
Marketing Fee:	\$ 100.00
External Referral Fee:	\$ 2,500,000.00
Balance for Distribution:	\$ 7,499,900.00

3) Commission Earned = Balance For Distribution * Tier (%)

Ex:-

Here the balance for distribution = 7499900

Tier = 60 %

So the Commission Earned = 4499940

Balance for Distribution:	\$ 7,499,900.00
Distribution to Agent	
Tier:	60.0%
Commission Earned:	\$ 4,499,940.00

4) Co-Agent Commission = Balance For Distribution * Co-Agent Percentage

5) E&O Insurance(Agent Portion) = E&O fee * (1 - Co-Agent Percentage)

6) E&O Insurance (Co-Agent Portion) = (E&O fee * Co-Agent Percentage)

7) Payable to Agent = Commission earned - E&O Insurance - Transaction

Co-ordinator Fee - Internal Referral Fee -Other Fee

Commission Earned:	\$ 4,499,940.00
Errors & Omissions Insurance:	\$ 0.00
Co-Agent Commission:	\$ 2,249,970.00
Transaction Coordinator Fee:	\$ 250.00
Internal Referral Fee:	\$ 1,000.00
Other Fees:	\$ 1,500.00
Payable to Agent:	\$ 2,247,220.00

8) Payable To Co-Agent = Commission - E&O Insurance + Internal Referral Fee

Commission:	\$ 2,249,970.00
Errors & Omissions Insurance:	\$ 0.00
Internal Referral Fee:	\$ 1,000.00
Payable to Co-Agent:	\$ 2,250,970.00

All payments will be net of any outstanding charges on agent's account.

Lease Opportunity

As mentioned, selecting "Lease" as the opportunity type will result in slight changes to the fields displayed on the Commercial Commission page, ie

Opportunity Type ?	Lease	Agent ?	
Opportunity Stage ?		External Referral rate ?	25.00
Property Address ?	6222 W KOLLMAYER CT	Co-Agent ?	
Seller/Landlord Name ?	Landlord 1	Co-Agent Percentage ?	30.00
Buyer/Tenant Name ?	Landlord 2	Required Approvers ?	Administrator X
Listing/Landlord Agent ?	Agent 1	Expected Closing ?	05/23/2025 ☆☆☆
Buyer/Tenant Rep Agent ?	Agent 2	Tags ?	

Internal Notes	Commercial Commission	Commission Report	Extra Information	Signage Information
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TRANSACTION DETAILS		Agent Payout Tier ?	0.60
List Price ?	0.00	Total Commission Received by LRE ?	\$ 150,000.00
Total Sales Price ?	0.00	Errors & Omission Fee ?	\$ 0.00
Total Commission Received by LRE ?	\$ 10,000,000.00	E&O Insurance (Agent Portion) ?	\$ 0.00
Marketing Fee ?	\$ 100.00	Commercial Co-Agent Commission ?	\$ 33,750.00
External Marketing Agency ?		Transaction Coordinator Fee ?	\$ 250.00
External Referral Fee ?	\$ 37,500.00	Internal Referral Fee ?	\$ 1,000.00
Balance for Distribution ?	\$ 112,500.00	Other Fees ?	\$ 1,500.00
E&O Insurance (Co-Agent Portion) ?	\$ 0.00	Commercial Payable to Agent ?	\$ 113,500.00
Commercial Payable to Co-Agent ?	\$ 34,750.00		

And also the Lease Commission Payout Report will be available in action button

The screenshot shows a CRM interface with a top navigation bar containing links for CRM, Sales, Commission, Leads, Reporting, Configuration, and My Business. Below the navigation bar, there's a breadcrumb trail: New / Administrator's opportunity / Opportunities. A status bar at the top right shows 'No Meeting', 'Quotations 0', and 'Rentals 0'. The main content area displays an opportunity record for 'Jenna Test'. A dropdown menu is open over the record, showing actions: Print, Archive, Duplicate, Delete, Add Properties, Request Signature, Mark Lost, Send email, Send SMS, and Enrich. The 'Print' dropdown also shows 'Commercial Commission Report' and 'Lease Commission payout'. The record details include: Expected Revenue \$ 0.00, Contact ?, Email, Phone, Opportunity Type Lease, Opportunity Stage, Property Address 6222 W KOLLMEYER CT, Seller/Landlord Name Landlord 1, Buyer/Tenant Name Landlord 2, Listing/Landlord Agent Agent 1, Buyer/Tenant Rep Agent 2, Salesperson Administrator, Is Approved (checkbox), External Referral Agent, External Referral rate 25.00, Co-Agent, Co-Agent Percentage 30.00, Required Approvers Administrator, Expected Closing 05/23/2025, and Tags.

Some Calculations:-

- 1) Amount(Total Commission Received by LRE) = Base Rent * Landlord percentage
- 2) External Referral Fee = Amount * External referral Rate
- 3) Balance For Distribution = Amount - External Referral Fee
- 4) Co-Agent Commission = Balance for distribution * Co-agent percentage
- 5) Payable to Agent = Commission Earned - E&O Insurance - Co-Agent Commission - Transaction Co-ordinator fee - Internal Referral fee - other Fee
- 6) Payable to Co-Agent = Commissions - E&O Insurance + Internal Referral fee

Once we set the required approvers and install the commission_payout_sign module, a new button labeled "Send Signature Request" will appear. Clicking this button allows to send a signature request to the selected approver.

The screenshot displays a software interface with a top navigation bar containing links like 'Apps', 'Update Apps List', 'Apply Scheduled Upgrades', and 'Import Module'. A search bar on the right shows 'Module commission_payout' with a search icon. On the left, a sidebar lists 'APPS' (All, Official Apps, Industries) and 'CATEGORIES' (All, Sales, Services, Accounting, Inventory, Manufacturing). The main area shows a 'Payout approval' module with a 'commission_payout_sign' button and a 'Module Info' link. Below this, a 'CRM' section includes links for 'Sales', 'Commission', 'Leads', 'Reporting', 'Configuration', and 'My Business'. A 'New Pipeline' button is visible. A secondary navigation bar includes 'No Meeting', 'Quotations', 'Rentals', and 'Commission Invoice'. The main content area features a 'Renu Test case' record with tabs for 'New Quotation', 'New Rental', 'Won', 'Lost', 'Commission', 'Create Invoice', and 'Send Signature Request'. The record details include 'Expected Revenue \$ 0.00', 'Probability at 99.81 %', 'Contact ?' (Email, Phone), 'Opportunity Type Sale', 'Opportunity Stage', 'Property Address ABC', 'Seller/Landlord Name Seller', 'Buyer/Tenant Name Buyer', 'Listing/Landlord Agent agent 1', 'Buyer/Tenant Rep Agent agent 2', 'Salesperson Administrator', 'Is Approved' (checkbox), 'External Referral Agent', 'External Referral rate ? 25.00', 'Co-Agent', 'Co-Agent Percentage 30.00', 'Required Approvers Administrator', 'Expected Closing ? 05/17/2025', and 'Tags ?'.

Before clicking the "Send Signature" button, please make sure to add an attachment by clicking the "Commission" button. This will generate an attachment on the Commission Report page.

Once the signature request is sent, it will redirect to the Sign module. From there, the approver can sign the report by clicking the "Sign Now" button, then validate and send the document.

Once the process is complete, a smart button labeled "Signature Requests" will appear, showing the number of requests. We can view the requests by simply clicking this button.

CRM Sales Commission Leads Reporting Configuration My Business

New

Pipeline

Renu Test case

No Meeting Quotations 0 Receipts 0 Signature Requests 1 Commission Invoice

1 / 1 < >

New Quotation New Rental Won Lost Commission Create Invoice Send Signature Request

New > Qualified Proposition Won Lost

Send message Log note Activities

Renu Test case

Expected Revenue Probability
\$ 0.00 at 99.81 %

Contact ?

Email

Phone

Opportunity Type Sale

Opportunity Stage

Property Address ABC

Seller/Landlord Name Seller

Buyer/Tenant Name Buyer

Listing/Landlord Agent Agent 1

Buyer/Tenant Rep agent 2

Salesperson Administrator

Is Approved

External Referral Agent

External Referral rate ? 25.00

Co-Agent

Co-Agent Percentage 30.00

Required Approvers Administrator x

Expected Closing ? 05/17/2025

Tags ? ☆ ☆ ☆

Today

Administrator Today at 8:00 PM

You will find attached the proof of payment document

Renu Test case.pdf

Certificate of completion - 2025-05-26 - 11:06:02.pdf

May 16, 2025

Administrator May 16, 9:01 PM

Lead/Opportunity created