1. Dashboard/
   1. Quick Client Search/Save Changes
      1. Not working!
      2. Do we need this? Edit policies does same?
2. Edit Policies in Database/
   1. Agency Estimated Comm/Revenue (CRM)
      1. UI Not calculating this amount.
         1. FORMULA: Premium Sold x Policy Gross Comm %
3. Edit Policies in Database/
   1. Agent Estimated Comm $
      1. UI Not calculating this amount.
         1. FORMULA: Premium Sold (x) Policy Gross Comm % (x) Agent Comm (NEW 50% RWL 25%)
4. Edit Policies in Database
   1. Can’t sort any columns!
5. Edit Policies in Database
   1. Agent Comm (NEW 50% RWL 25%)
      1. Should be (0.50 or 50%)
6. Add Policy Term column
7. Ad New Policy Transaction Page
   1. Need option to add Policy Types
8. **ADMIN PANEL/ FORMUL ISSUES/CRITICAL ISSUE: Agent Comm Rate Inconsistency**

**Quick Test Checklist for Broker Fees & Tax Implementation**

✅ Add New Policy Transaction Page

Test Basic Entry:

- Enter Premium Sold: $10,000

- Enter Policy Taxes & Fees: $500

- Enter Broker Fee: $250

- Verify Commissionable Premium shows: $9,500

Test Commission Calculations:

- Enter Policy Gross Comm %: 20%

- Select Transaction Type: NEW

- Verify Agency Comm = $1,900 (20% of $9,500, not $10,000)

- Verify Agent Comm = $950 (50% of $1,900)

- Verify Broker Fee Agent Comm = $125 (50% of $250)

- Verify Total Agent Comm = $1,075 ($950 + $125)

Test Save:

- Fill in required fields (Customer, Policy Number)

- Save the transaction

- Verify success message appears

✅ Edit Policy Transactions Page

- Search for the policy you just created

- Click to edit it

- Verify all new fields appear with saved values

- Change Broker Fee to $500

- Verify Broker Fee Agent Comm updates to $250

- Verify Total Agent Comm updates correctly

✅ All Policy Transactions Page

- Toggle "Show Formulas" ON

- Verify new columns appear: Commissionable Premium, Broker Fee Agent Comm, Total Agent Comm

- Verify calculations show with indicators (✓, ✏️, etc.)

- Toggle "Show Formulas" OFF

- Verify actual database values display

✅ Edge Cases to Test

- Enter $0 for Policy Taxes & Fees (Commissionable = Premium)

- Enter $0 for Broker Fee (Total Comm = Agent Comm only)

- Test RWL transaction (25% commission but still 50% on broker fee)

- Test negative premium (endorsement reduction)