



BOS Version 20 Reporting and Data Exporting Reference

Lantrax BOS support staff & Profit Power migration staff

Key Staff Help Report Lists and PP Migration Assist Exports	61
Work Volume: numbers for migration planning	61
Offices: Lists and Data Export for Migration Planning and Setup	63
Agents: Exporting Data	66
Agents: Migration ExportLT Roster	68
Agents: Migration Export DDepositLT Setup Data	70
Agents: in PP Commission Plan Setup – which plans?	71
Agents: ExportLT Main Commission Plan Assignments	74
Agents: ExportLT of Assigned OTB Deductions with R106	76
Agents: LT Export OTB Comm. Deductions Taken using R134	78
Agents: LT Export A/R Items Billed R702, R712	80
Agents: Export A/R Balances (R703)	82
Agents: Export A/R Balances (R703) for LT	84
Agents: Make 1099 XLS for Lantrax1099 Support or 3rd Party	86
Agents: Closed Comm. Data for ProfitPower C-Plan Calcs.	89
Brokers: and Outside Companies Export (Generic)	92
Brokers: Business Partners ExportLT (PP migration)	94
BOS Contacts: Export as Business Partners	96
Vendors: Lists and Export (Accounts Payable & Pay Ded.)	97
Main Contacts: Lists and Export	98
Listings: Search Export and ExportLT	100
Transactions: Search Export	104
EscrowTrust: R604 Export Information for Profit Power	106
Preference Tables: Lists and Exports	108

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1-800-732-5327 (20240207)

Key Staff Help Report Lists and PP Migration Assist Exports

This section provides details that can help users obtain reports and data exports that assist data sharing or import into other apps. The section’s purpose is also to help Lantrax staff obtain the data and setups needed to assist migration training and go live with Profit Power.

Note that many of the data exports have been available for many years while those programmed recently per Lantrax staff requests will have “LT” as part of the format or option name.

Work Volume: numbers for migration planning

Hey Stan,

I hope you are doing well.

We are working on getting Jack White live on Profit Power. Aaron wanted to know if you could provide us with a report of the Monthly Closed Units for the last 12 months. We want to see what kind of work volume they have had the last 12 months.

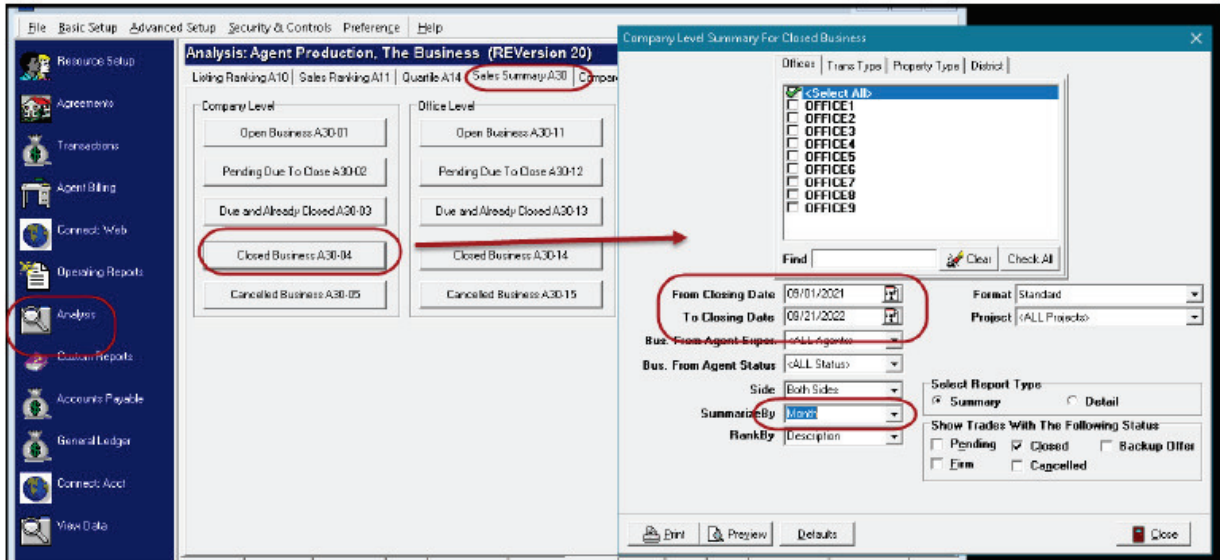
Let me know if you need any further information.

Thank you.

09/21/2022		JACK WHITE REAL ESTATE									
		Company Level Summary For Closed Business by Month Both Sides								Rank: Description	
		From Closed Date 09/01/2021 To Closed Date 09/21/2022									
Project: All Projects		Type: All Types									
Status: CLOSED		Office: All Offices									
		Property Type: All Property Types									
#Trans	Month	GCI	Referrals	A GCI	Plan/OffTop	NA GCI	Agent Gross	Comp Dollar	Units	Volume	
CompanyWide											
253	2021/09	2,479,815.14	156,553.57	2,323,261.57	0	2,323,261.57	2,008,492.64	314,768.93	246.00	90,538,942	
269	2021/10	2,265,187.50	139,287.71	2,125,899.79	0	2,125,899.79	1,862,242.07	263,257.72	264.00	80,451,536	
239	2021/11	2,106,594.89	110,530.98	1,995,963.91	0	1,995,963.91	1,739,259.81	256,704.10	237.00	79,819,621	
278	2021/12	2,872,164.09	180,099.25	2,692,064.84	0	2,692,064.84	2,422,876.41	269,388.43	284.50	96,258,220	
171	2022/01	1,549,427.91	44,090.24	1,505,337.67	0	1,505,337.67	1,269,816.69	195,220.98	160.00	58,179,224	
156	2022/02	1,888,829.36	19,818.60	1,869,010.76	0	1,869,010.76	879,992.04	189,818.72	135.50	37,200,171	
204	2022/03	1,841,230.31	209,545.60	1,631,684.71	0	1,631,684.71	1,321,303.42	310,381.29	181.00	52,891,687	
208	2022/04	1,782,987.14	88,631.06	1,694,356.08	0	1,694,356.08	1,405,448.69	287,907.39	183.00	69,753,968	
239	2022/05	2,237,297.10	205,798.93	2,130,498.17	0	2,130,498.17	1,828,536.63	301,961.24	217.00	82,872,932	
308	2022/06	2,537,968.94	105,984.01	2,431,984.93	0	2,431,984.93	2,114,635.09	317,349.84	286.00	91,446,526	
253	2022/07	2,206,000.34	62,665.57	2,143,334.77	0	2,143,334.77	1,874,281.80	268,952.97	231.00	74,214,877	
268	2022/08	2,218,766.57	97,184.16	2,121,582.41	0	2,121,582.41	1,830,625.59	262,956.82	252.00	72,708,237	
146	2022/09	1,819,755.40	48,446.06	1,771,309.34	0	1,771,309.34	853,770.07	117,539.27	120.00	34,726,174	
2,992	CompanyWide	26,206,024.69	1,470,035.74	24,735,988.95	0	24,735,988.95	21,499,480.95	3,336,508.00	2,807.00	923,262,134	

The above company-wide Analysis – A30 Summary report can be run to help plan BOS customer migration to Profit power.

Key Staff Help Report Lists and PP Migration Assist Exports



Above illustrates how to run this report using the Summarize by “Month” option.

09/28/2022

JACK WHITE REAL ESTATE
Company Level Summary For Closed Business by Office Both Sides Rank: Description
 From Closed Date 09/01/2021 To Closed Date 09/31/2022

Project: All Projects
 Status: CLOSED
 Type: All Types
 Office: All Offices
 Property Type: All Property Types

MTrans	Office	GCI	Referrals	A GCI	Fran/OffTop	NAGCI	Agent Gross	Com.p.Dollar	Units	Volume
CompanyWide										
1210	OFFICE1 ANCHORAGE	10,635,974.21	320,121.15	10,315,853.06	0	10,315,853.06	8,912,901.03	1,402,952.03	1,104.00	391,891,392
2	OFFICE2 EAGLE RIVER	24,292.50	0	24,292.50	0	24,292.50	17,133.12	7,159.38	2.00	1,219,500
724	OFFICE3 WASILLA	4,331,602.00	223,459.07	4,108,142.93	0	4,108,142.93	3,381,539.27	726,603.66	577.00	143,891,516
21	OFFICE4 VISTA REFERRAL CTR	61,484.75	0	61,484.75	0	61,484.75	61,484.75	0	15.00	175,903
464	OFFICE5 SOLDOTNA	3,188,838.17	90,942.37	3,097,895.80	0	3,097,895.80	2,769,404.60	328,491.20	545.50	117,468,646
331	OFFICE6 JACK WHITE COMMERCIAL	6,480,914.33	780,074.59	5,700,839.74	0	5,700,839.74	4,982,104.02	718,735.72	324.50	208,975,878
94	OFFICE9 KENAI	563,163.33	6,992.30	556,170.83	0	556,170.83	521,144.09	35,026.74	119.00	25,013,125
2846	CompanyWide	25,286,269.29	1,421,589.88	23,864,679.61	0	23,864,679.61	20,645,710.88	3,218,968.73	2,687.00	888,635,960

Also helpful for training and migration planning is to run the same A30 report by Office to learn about the relative amount training may be needed.