REAL/Easy Version 17 BOS Learning Tour

Using Best Realty

Company, Office, and Agent Setups
Brokers and Contacts
Listings, Sales, Escrow/Trust, Closing, Reports

1-800-732-5327

Welcome to the REAL/Easy Back Office System

Welcome to REAL/Easy Back Office System, or BOS. You will find that the BOS system will enhance your ability to track your real estate business more efficiently and improve management reports so you can more quickly adapt to changes in your markets.

The purpose of this manual is to help get you off to the right start. A good way to learn quickly is to see examples using our learning company, Best Realty. With this “Tour” you will learn the basics of how BOS can help your track your business.

How to Start the Tour

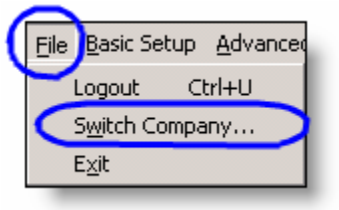
Welcome to REAL/Easy BOS, or REAL/Easy **B**ack **O**ffice **S**ystem, and the Beginners Tour. In this tour you will learn:

1. How to log into Best Realty and use it for practice.
2. How to look up information in BOS such as agent and sales data.
3. How to print reports such as agent rosters and sales summaries and lists.

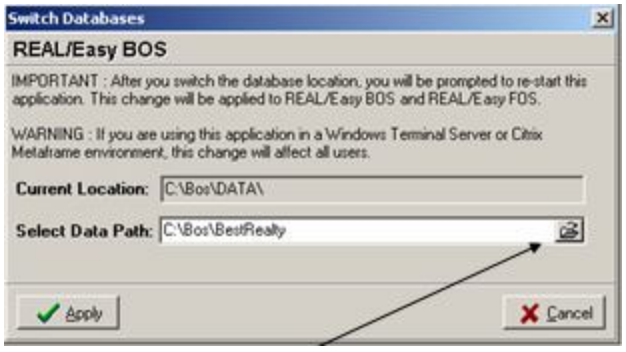
The tour is done using a small practice company called The Best Realty Company. By using The Best Realty Company, you do not have to worry about making a mistake because it is not your data. Also you don't have to worry about how to enter data because, with The Best Realty Company, the data is already there. Thus, you can then learn quickly how to look up information and print reports.

First we will switch to the Best Realty database.

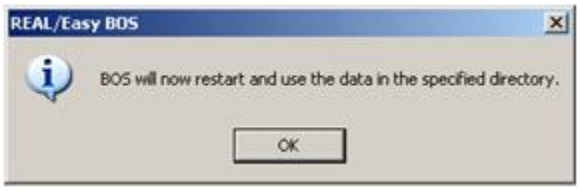
Step 1: - Switch to the Best Realty Database



- At the menu bar, click on **File**, then from the dropdown start the **Switch Databases** option.



- Click the drop down to select Best Realty
- Click **Apply**



- Click on the **OK** The BOS system will then restart and you will login again, but now, you'll be in the Best Realty database.

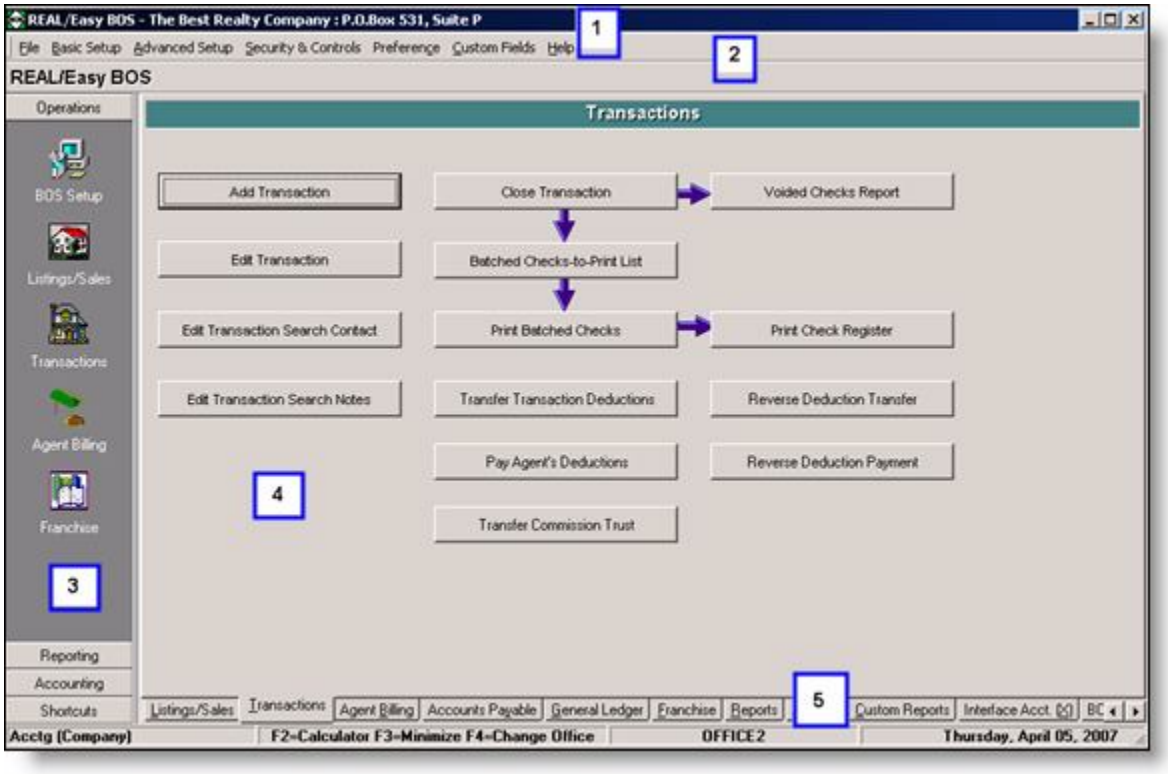
Step 2 — Start REAL/Easy BOS and Log In

- Now, you are ready to do the tour, you are switched to the Best Realty database for the time being. Select the "**REAL/Easy BOS**" icon (above) from your Windows desktop.

You should obtain the above login screen

- For now, You do not need a password, Click: 

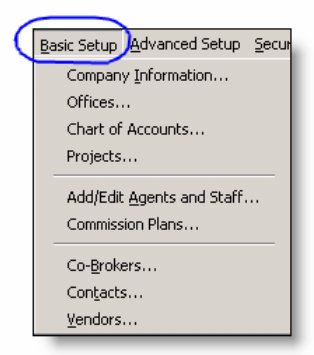
The REAL/Easy BOS Desktop



Whenever you begin your REAL/Easy BOS session, you will be greeted with the above desktop. This desktop is designed to help you *quickly* access all tasks from the beginning setups to your daily tasks to reporting on company performance. There are **five components** making up the REAL/Easy BOS Desktop. Let's take a look at them.

1. At the top, the **title bar** shows the name of the program. The name of the company is displayed, according to the database you are switched to – e.g. The Best Realty Company.

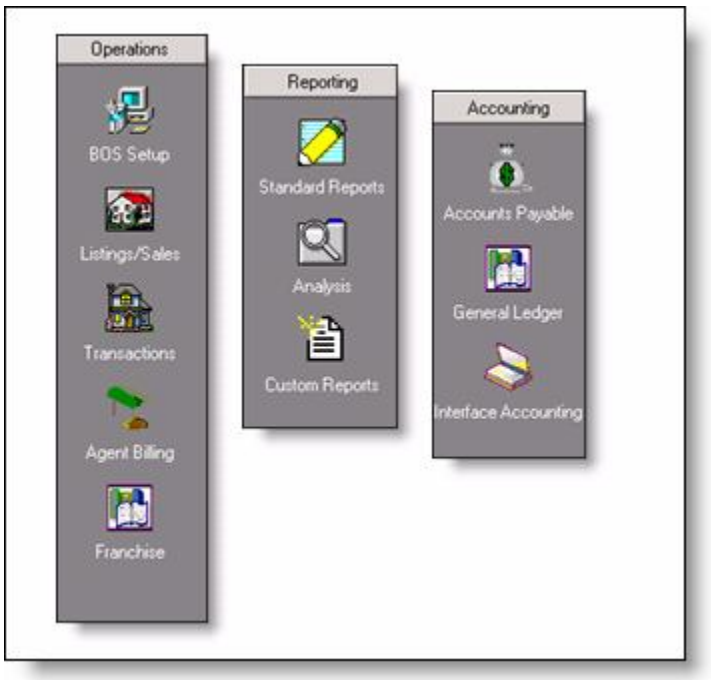
2. Next, the (File) **menu bar** displayed above, is the same all the time. Setups and most operations in REAL/Easy BOS can be run from the menu bar.



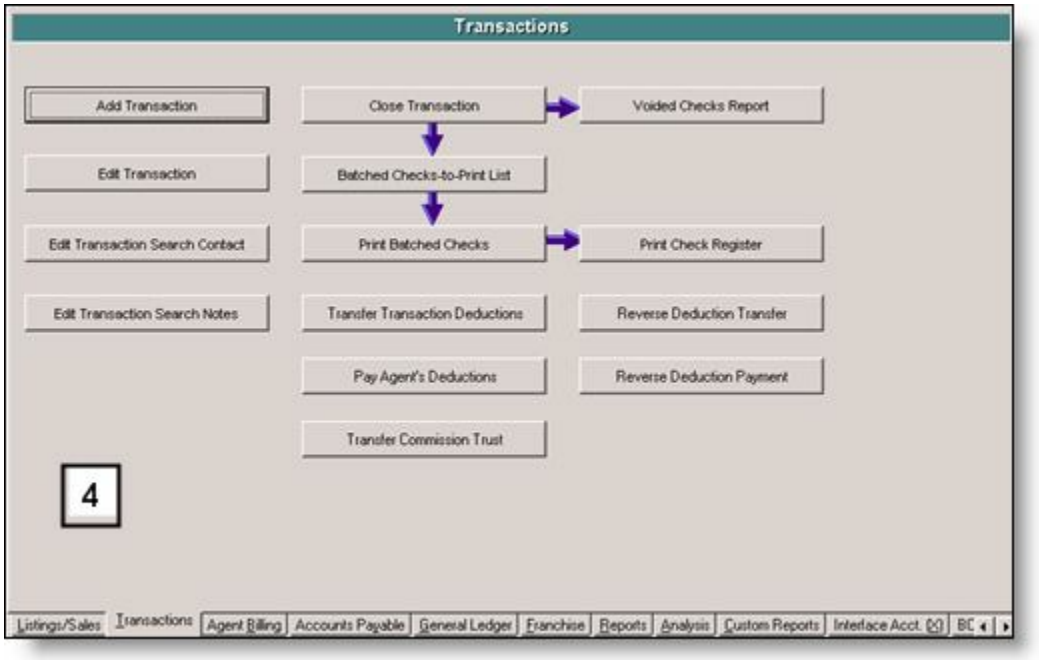
Each menu bar item, such as Basic Setup (shown above), Security & Controls, or Preference, has a drop down menu to provide access to operations and indicate the hot keys that can be used.

3. On the left, the **Module Tool Bar** shows the different work areas in REAL/Easy BOS. When you choose a module here, the main screen work area to it's right provides access to the functions available within the module.

BOS's capabilities are organized into three main **Module Groups**.



We will come back here later to explain the different modules.



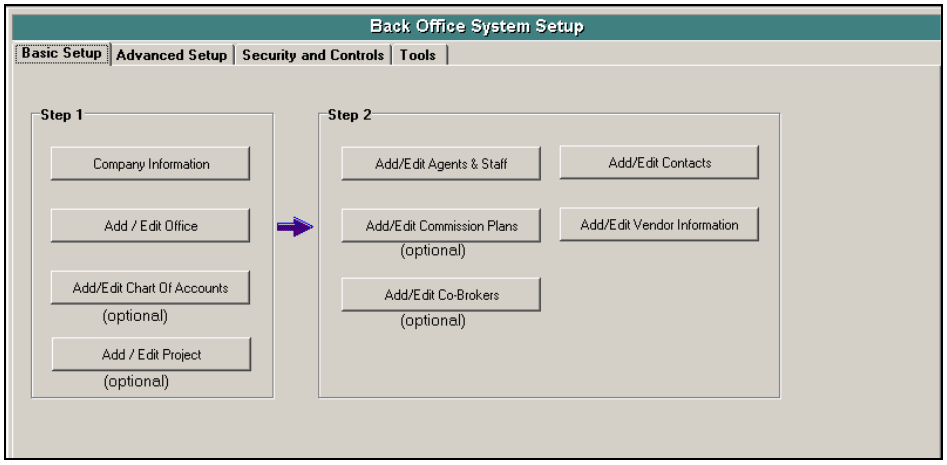
4. This is your main work area, or **Screen**. REAL/Easy BOS defaults to the Transactions screen when you log in as shown above. Most of your day-to-day operations will take place here. This area changes according to the module you choose from the module tool bar. Note that each icon/button in the work area represents a different function, or process, that you would use within the transaction module.

5. The **Status Bar** is at the bottom. Items displayed include your logged-in user name and info about certain hotkey and other options available. Next the login office is displayed followed by the current day/date display. Note, that if you are a multi-office company, REAL/Easy BOS can handle office/branch level security.

BOS Operations - Setup

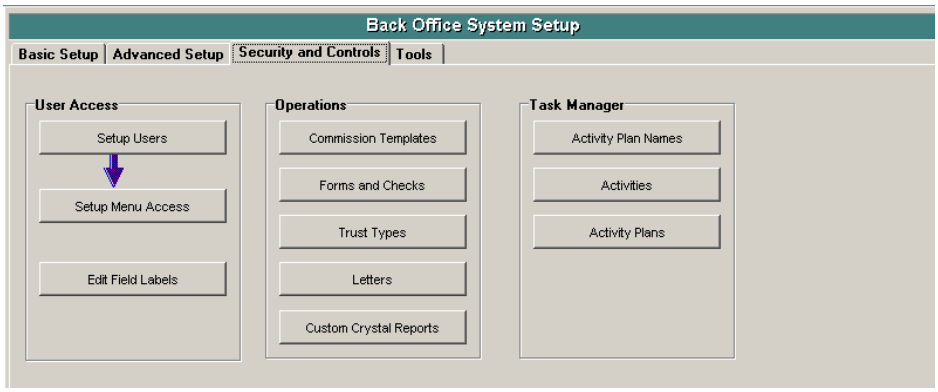
Since you would be using the left side menu-tool bar the most, lets take a quick look at what's available. When you begin using REAL/Easy BOS, you must first do some setups.

- Click on the "**BOS Setup"** module tool now.

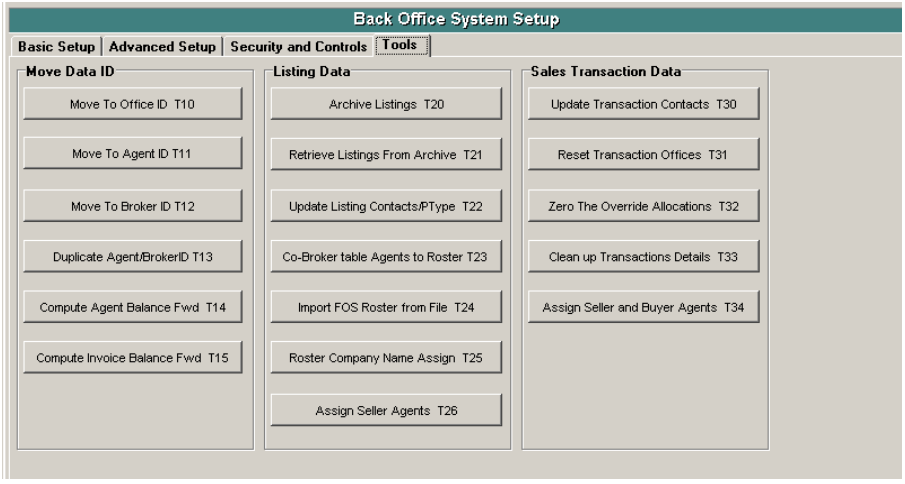


The **Basic Setup** functions (tab) which should now be displayed on your main screen. The ***setup functions are represented by the large buttons*** such as setting up our Offices and your Company

More advanced setup functions for commission deductions, agent billing and agent 1099 income adjustments are accessible from the **"Advanced Setup"** tab



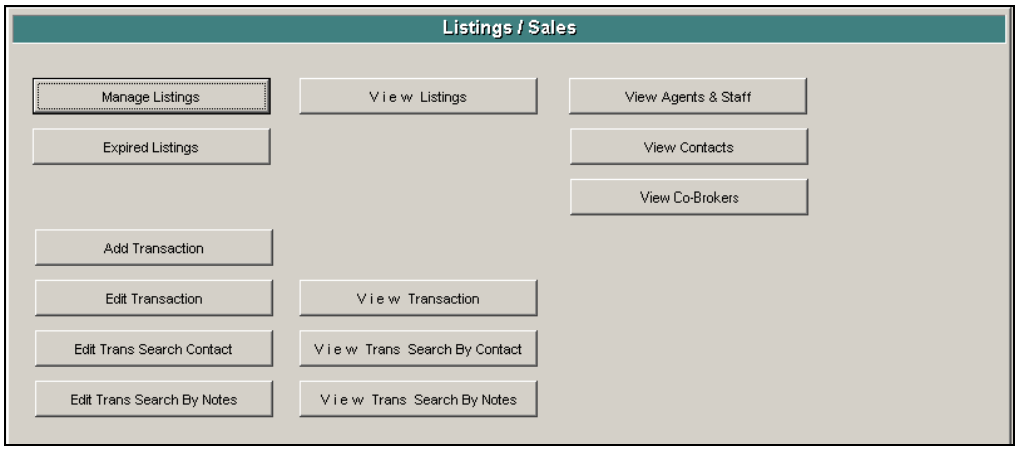
The **Security and Controls** tab can setup users and their accessibility to the system, setup commission templates, choosing forms, checks and custom reports and planning activities.



The **Tools** tab provides a number of programs that can help add value to your data especially if you have upgraded from earlier versions of REAL/Easy. Some functions such as import MLS rosters to FOS (for FOS users) can save time and increase efficiency.

BOS Operations – Listings and Sales

- Click on the Listings/Sales module tool



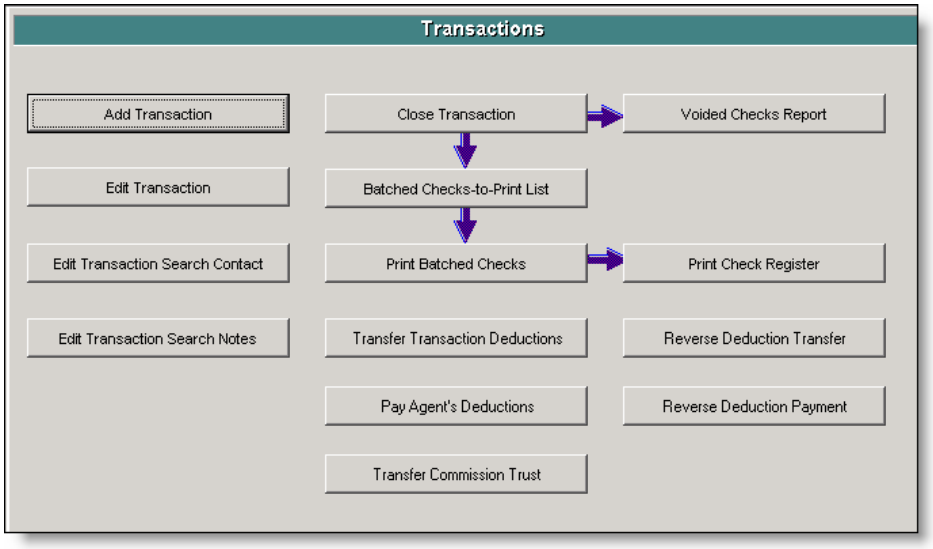
With this module you can manage Listings and Transactions. Central office staff use the commands to enter and maintain active listings and pending sales. In multi-office companies, branch users also can maintain their office's listings and pending sales from this module.

View buttons are available for those users that are restricted to viewing and cannot change data. Managers, Concierge, Relocation, e-Commerce staff are often given view access to help with their communications and service.

Often, the staff may know only know a seller, buyer, or builder name and wish to view details of a transaction. Buyers and sellers and others involved in sales transactions are called "Contacts" and search options are available to view all transactions where a particular seller, buyer, builder, attorney, was involved in.

BOS Operations – Transactions

- Click on the Transactions module tool



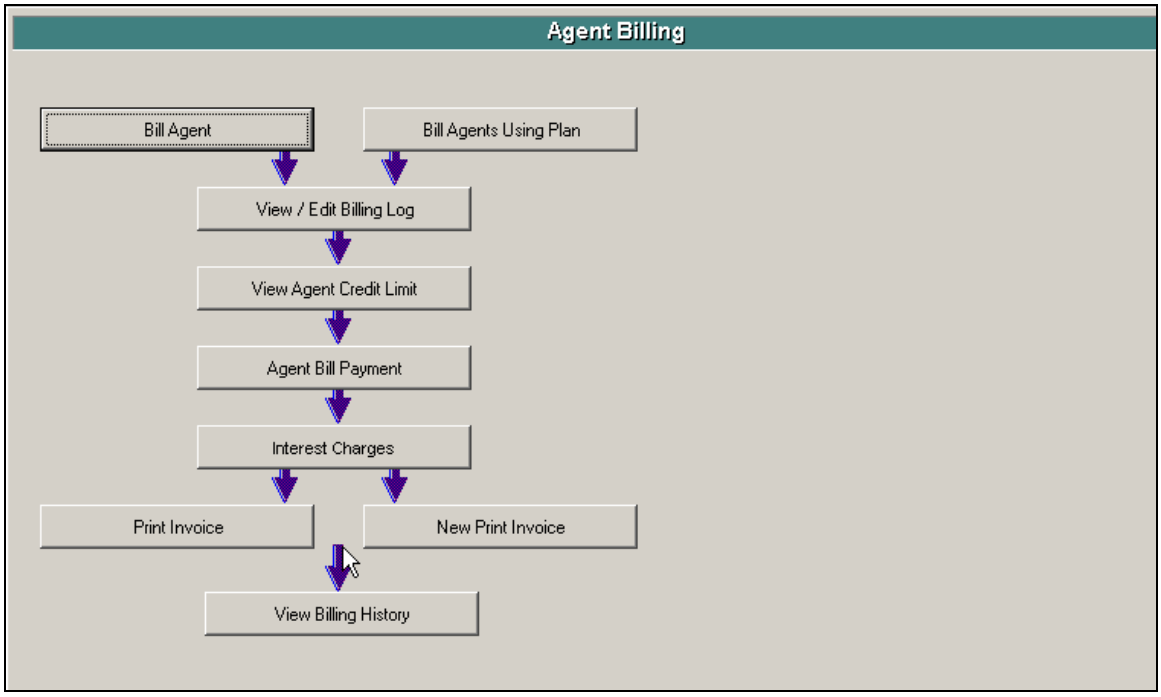
With this module you can manage many transaction maintenance, closing, and post closing functions. .

While transactions can be added and edited in this module, the primary purpose is to give the closing department efficient processing for:

- handling all agent commission plan calculations
- printing commission checks either interactively or with batches,
- closing sales,
- closing out escrow/out trust if you have broker held trust,
- paying agent deductions to vendors,
- handling commission trust holding accounts,
- calculating and/or entering all agent commission deductions
- deducting agent account balances from commission checks
- also recording commission payments as direct deposits or closing company
- calculating and paying all types of agent and manager override commissions
- calculating and paying co-broker fees, referral and referral network fees,
- automatically journalizing check and other posting reversals when necessary
- keeping track of and reporting voided checks

BOS Operations – Agent Billing

Click on the Agent Billing module tool now.

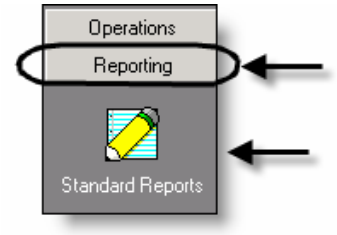


Above are the capabilities offered by REAL/Easy BOS in the agent billing area. Many companies call this agent receivables.

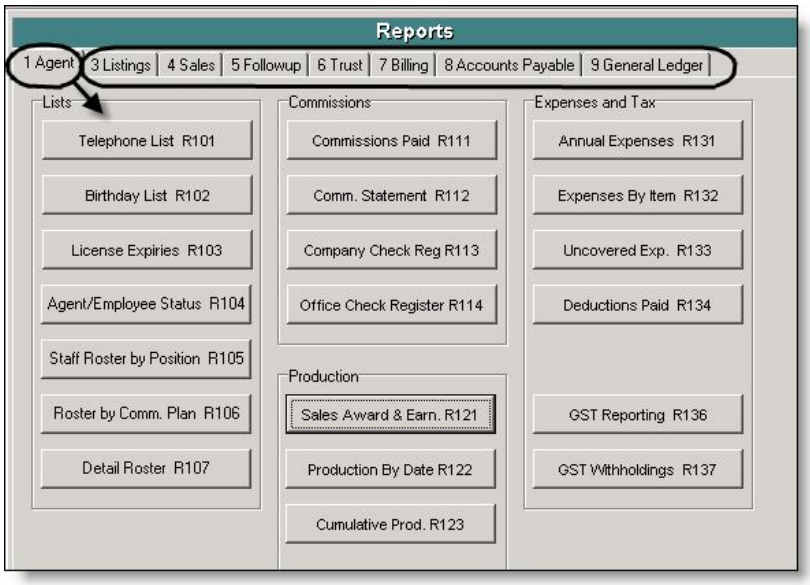
Most companies will implement this after sales transactions processing is under control. Note that there is an interface between the REAL/Easy BOS commission check-writer and the billing system for brokers who wish to recover agent balances due via commission check deductions.

Included in the Billing module is the capability to print agent invoices, statements, record payments, charge interest for past due balances, and view all past bills from the billing history.

BOS Reporting – Standard Reports



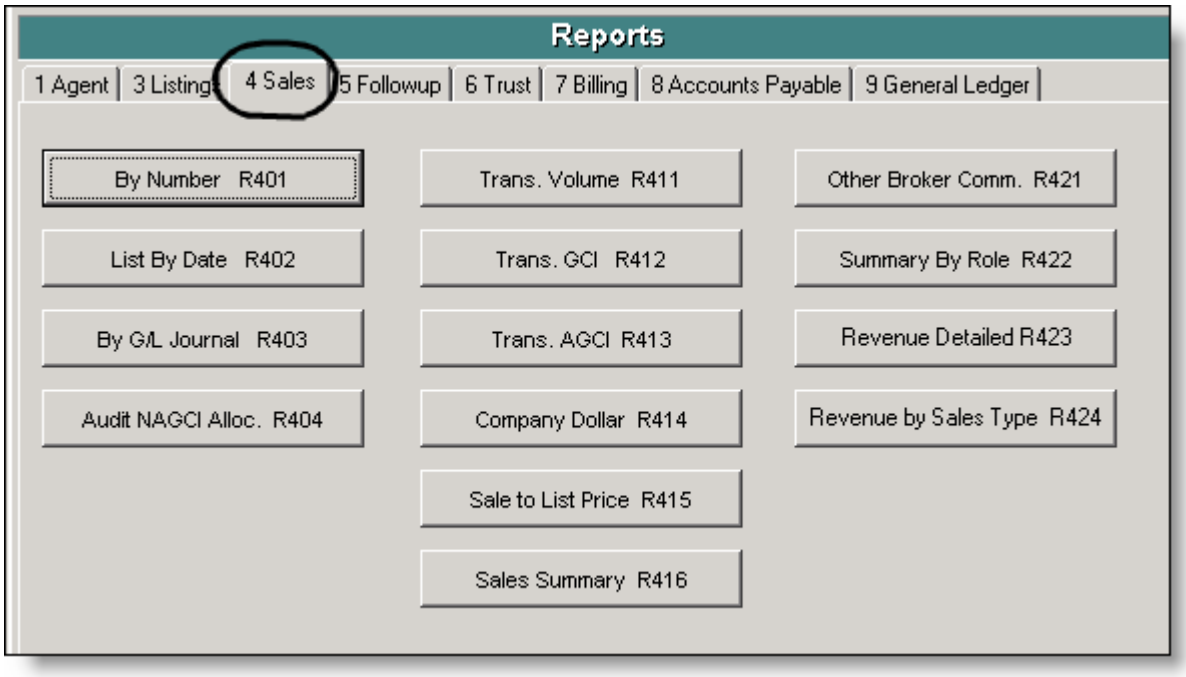
- Click on the **Standard Report**s module tool. To view this tool click on the "**Reporting**" grouping to display the three reporting tools.



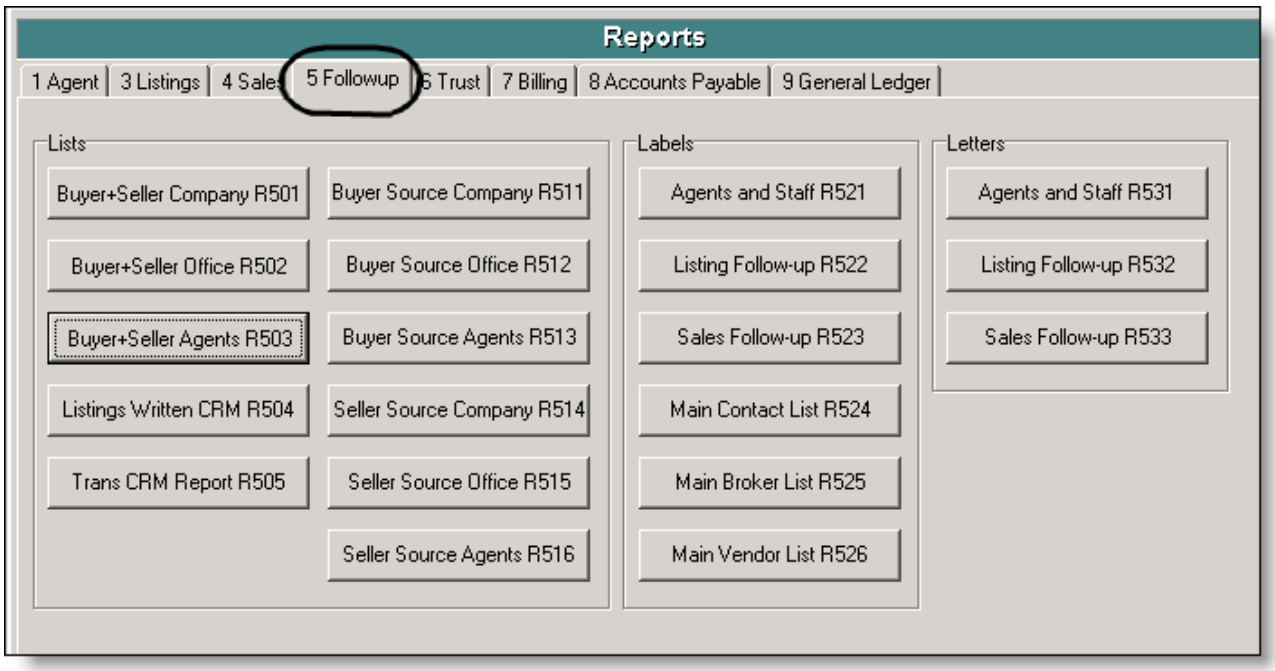
The Standard Reports module offers many reports to help everyone in the company from the agents, branch staff and management, corporate staff, management, and owners. The reports can help with tracking and management of day-to-day operations to annual recap and award reporting.

As shown above, there are a number of standard reporting areas starting with "**1 Agent**" accessible by clicking each tab at the top of the screen. Within Agent, there are simple "Lists", "Commissions" reports, "Production" reports, and reports that detail agent "Expenses and Tax" incurred and paid.

Other reporting areas as shown above include reports for:
3 Listings inventory and production detail and summaries, volume ranking
4 Sales tracking, pipelines, and closed production, inhouse and outside revenue
5 Followup lists, labels and letters for marketing,
6 Trust/Escrow transaction ledger sheets, open and running balance, audit
7 Billing statements, current balances, running balances
8 Accounts Payable statements, vendor lists, 1099's for agents and brokers
9 General Ledger ledger activity, journal details, reconciliation, statements

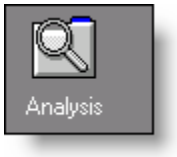


- Click on the other standard report areas such as "Sales" to view the various types of tracking, production, lists, summaries.

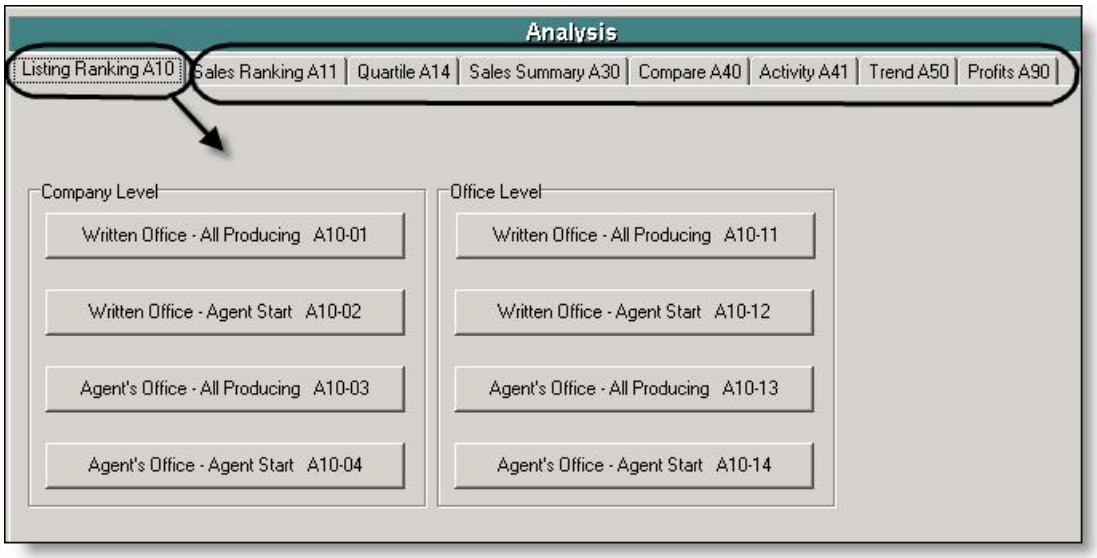


- The Followup area prints reports, labels, and letters to assist with contacting current and past sellers and buyers. Lists are available for the company, office, or for each agent. The lists can also be exported to worksheets for the agents. Labels and Letters can also be printed for all levels and to all or targeted contacts.

BOS Reporting – Analysis

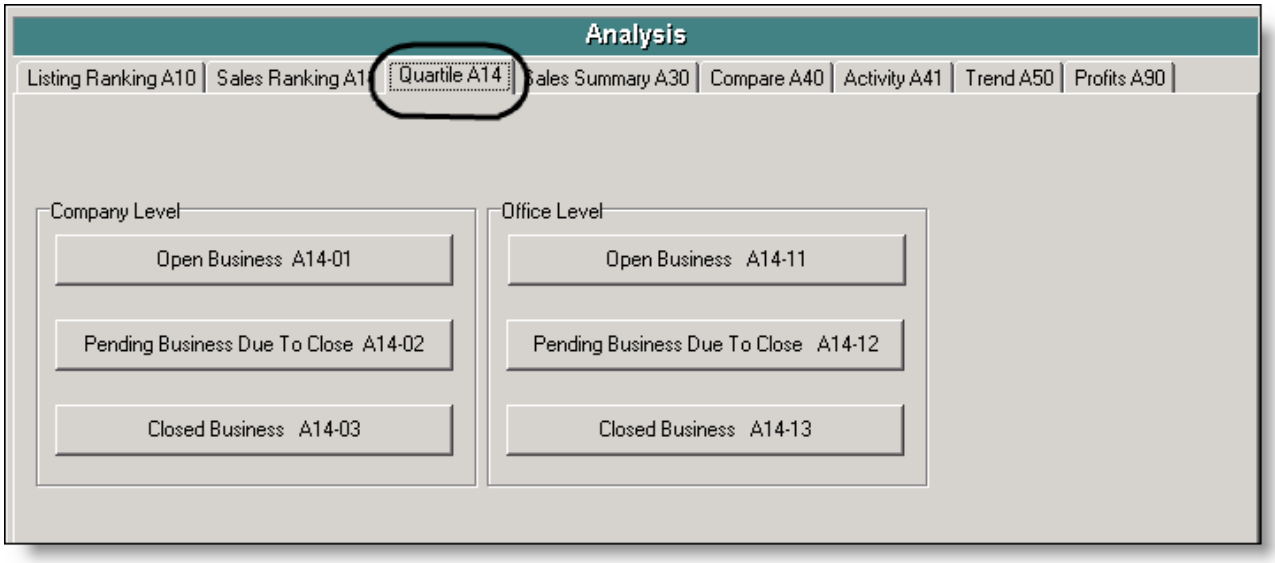


Click on the Analysis tool. This area offers many types of analytical reports that can help review and plan business direction and staffing at all levels – company-wide, office/branch, and agent. .

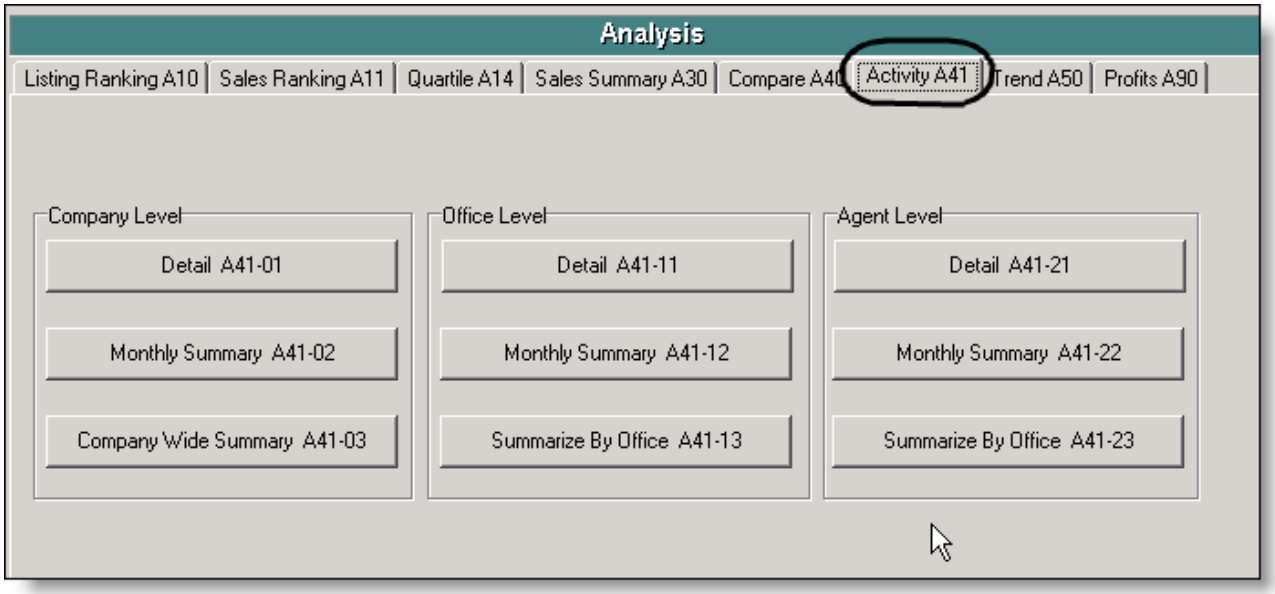


There are a number of Analysis areas. Shown above is the Listing Ranking A10 analysis where agent production can be compared at the company and office levels. Other Analysis areas include:

- **Sales Ranking A11** – rank sales written, current pipelines, closed production at company and branch levels.
- **Quartile A14** – divide company wide or branch agents into four quartiles of revenue or volume production to compare what portion of the agents generate different levels of business.
- **Sales Summary A30**- - summarize written, pending, closed business at company wide, branch, and agent levels by sale type, month, status, source and other criteria to learn more about the business.
- **Compare A40** – compare written, pipeline, or closed business for any time period to learn how the business is changing or responding to company programs.
- **Activity A41** – detail or summarize listing, A.O., and closed business activity for company wide, branch and agent levels to view changes or turning points in the business.
- **Trend A50** – company, branch, and agent trend reporting to compare which areas of the business are moving.
- **Profits A90** – compare all agents revenue, company dollar, expense recovery, and contribution to company/branch net profit to understand which agents/programs are the most successful.

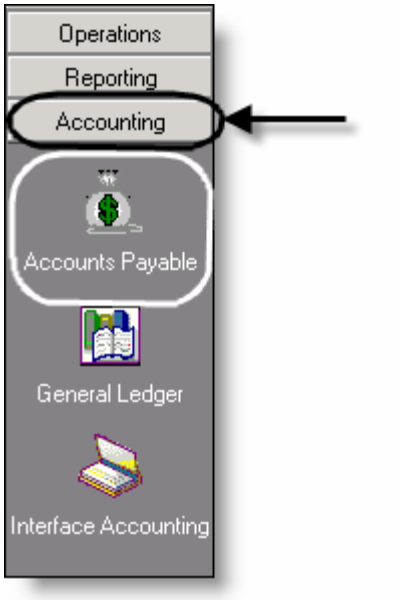


- Click on the other Analysis report areas such as "Quartile" to view the various types of analysis available.

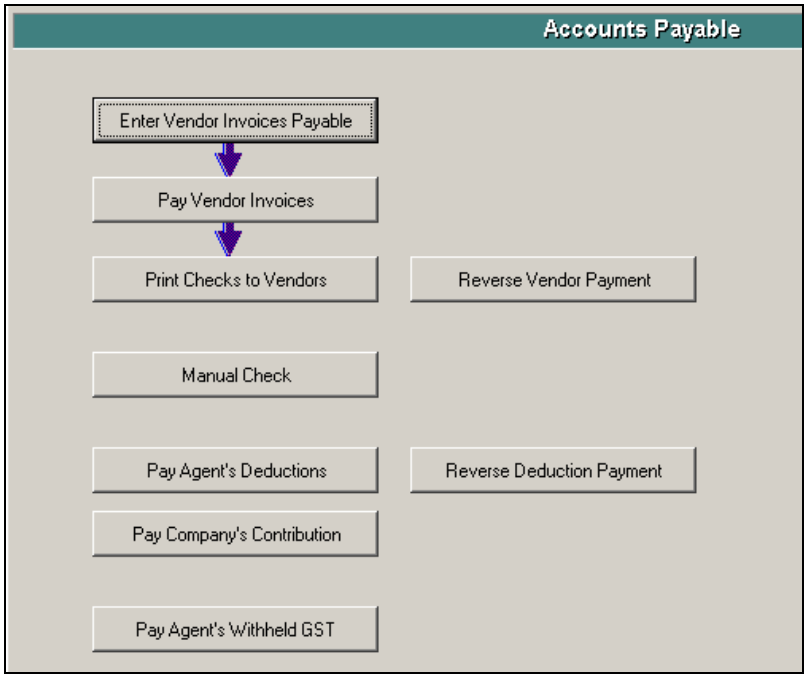


- Activity A41 Analysis helps staff at all levels view and compare listing, offer, and closed business activity levels to learn as soon as possible about changes in business direction.

BOS Accounting – Accounts Payable



To view the A/P tool click on the “Accounting” grouping. Click on the Accounts Payable module tool.

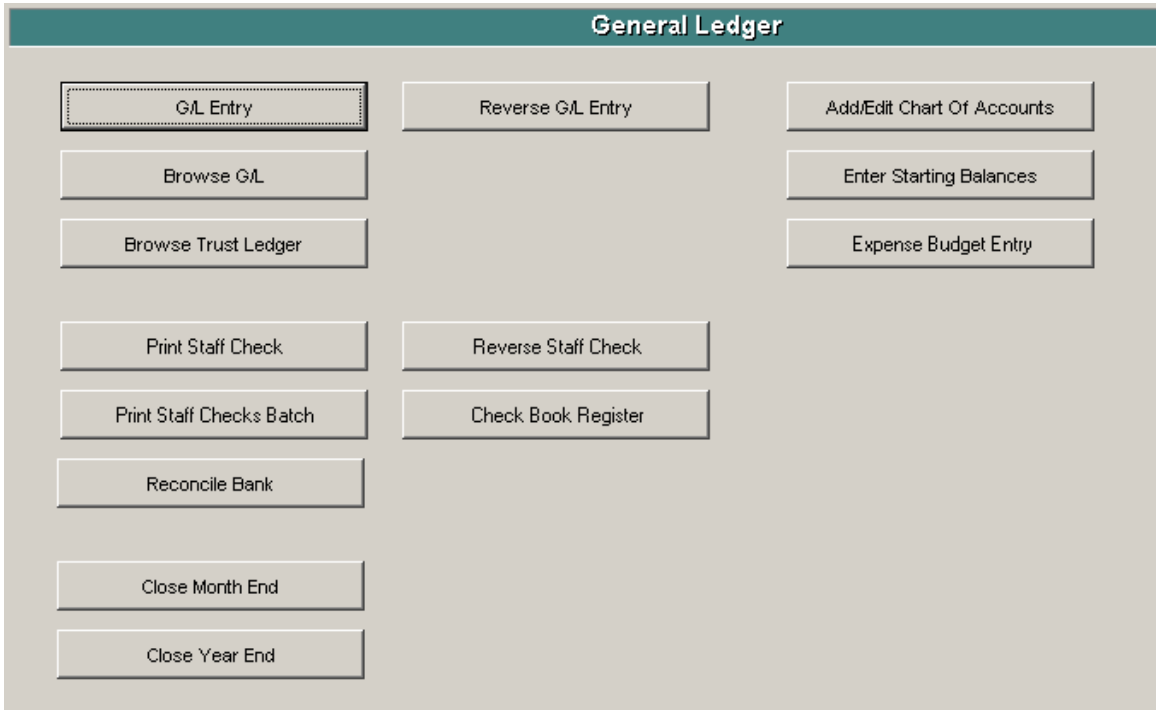


With REAL/Easy BOS, you can also pay all of your bills using the integrated Accounts Payable module.

Above, you can see that this is a complete payables system so that you can make this task as painless as possible. And, if you choose to use REAL/Easy BOS’s financial reporting, this Payables module will do all of the posting for you automatically!

BOS Accounting – General Ledger

Next, click on the General Ledger tool.



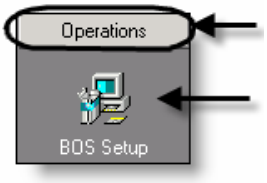
For companies who want to use REAL/Easy's integrated financial reporting and activities capabilities, there is the General Ledger module. TWIth the GL funciont shown above, you can observe the full complement of functions from maintaining the chart of accounts to making G/L entries to bank account reconciliation..

There is even a trust-account tie in if you are in a state where brokers also maintain broker held escrow/trust account(s).

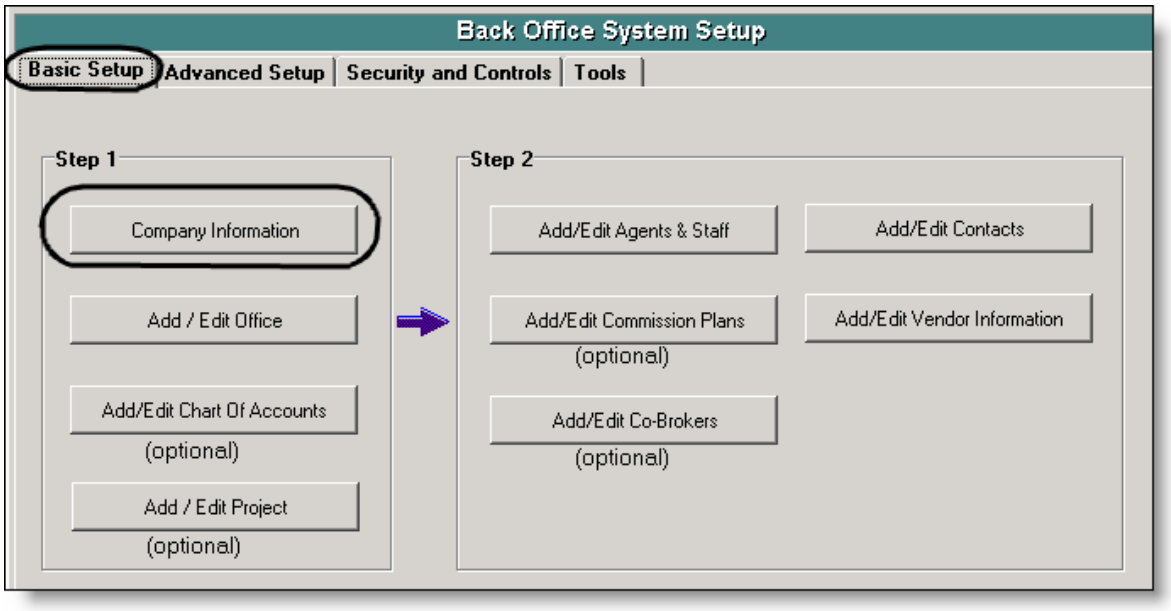
How to View and Change Your Data

In this section we will review the key setups that adapt REAL/Easy to how you organize, track, and process your business.

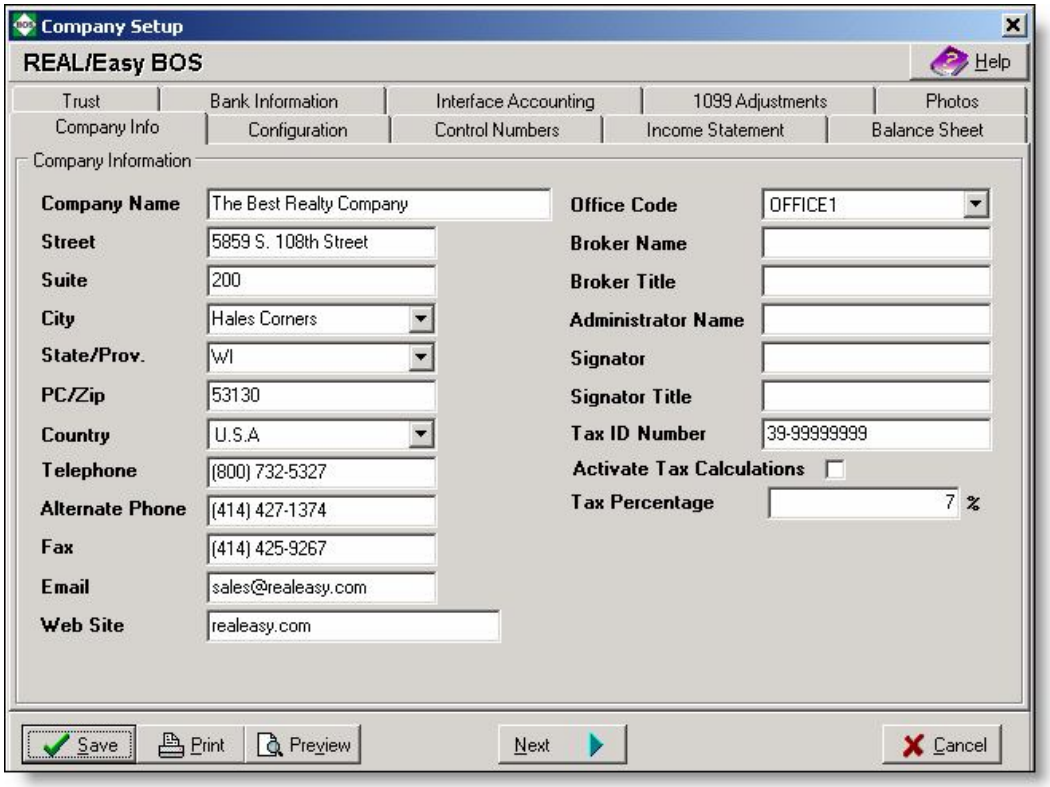
Step1- Looking at Company Setups



Click on the BOS Setup module tool (looks like above and is in area 3 the module tool bar on the left side of your screen).

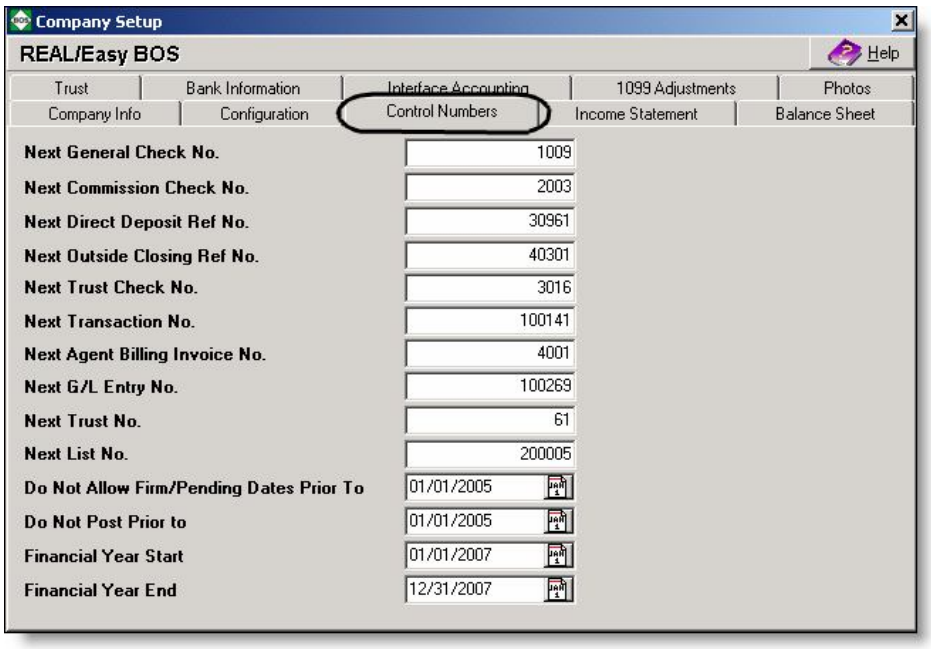


Click on 

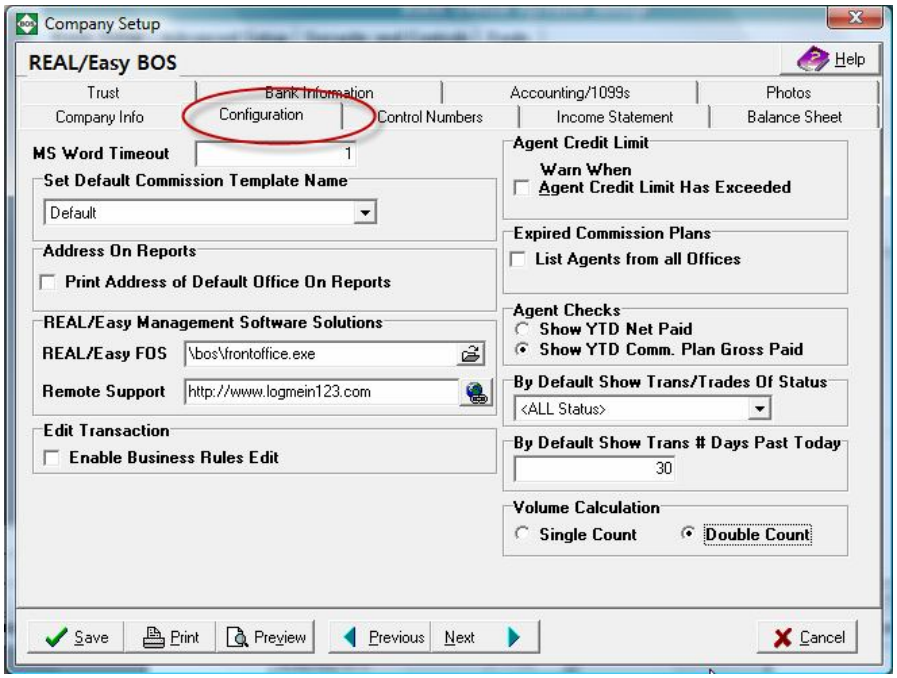


This form contains the basic information for your Company. Your company name is required for software registration and the company address should be completed as this is printed in the title of most reports.

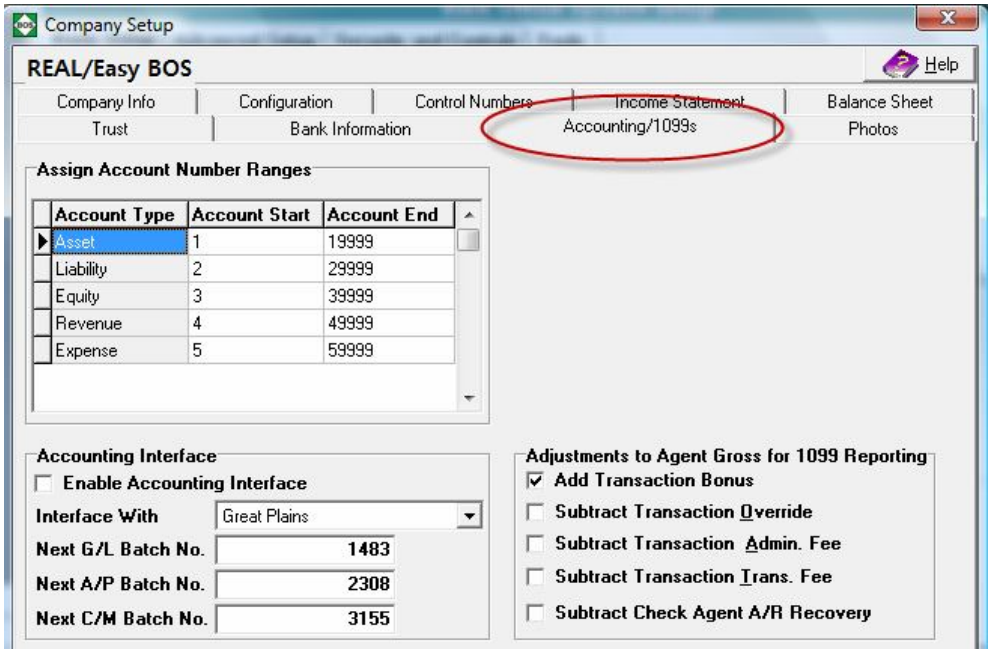
Click on the  tab.



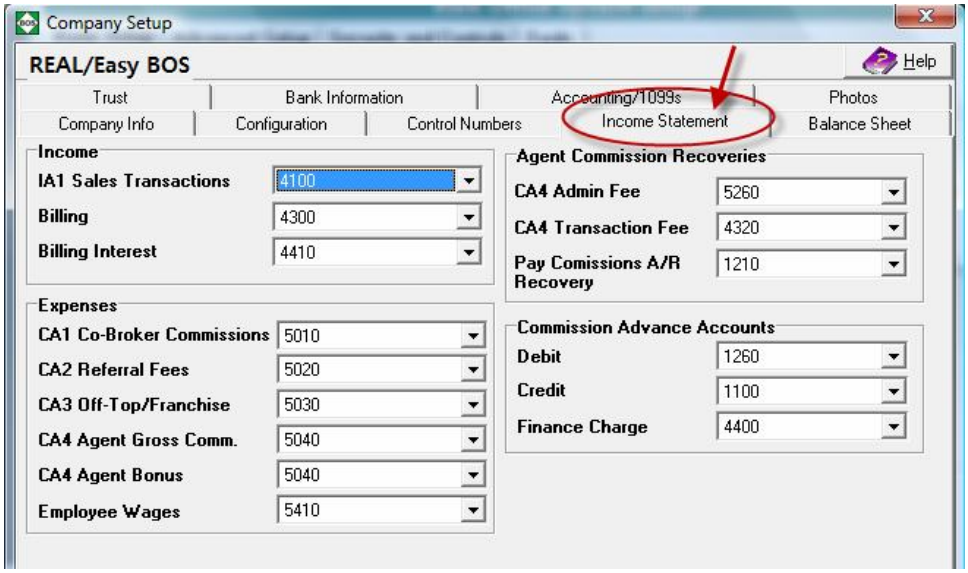
On this form you can designate the numbers used in various functions such as checkwriting, invoicing, adding transactions. Also there are date parameters for financial year.



On the “Configuration” tab shown above, a number of settups are available to help users operating the system.



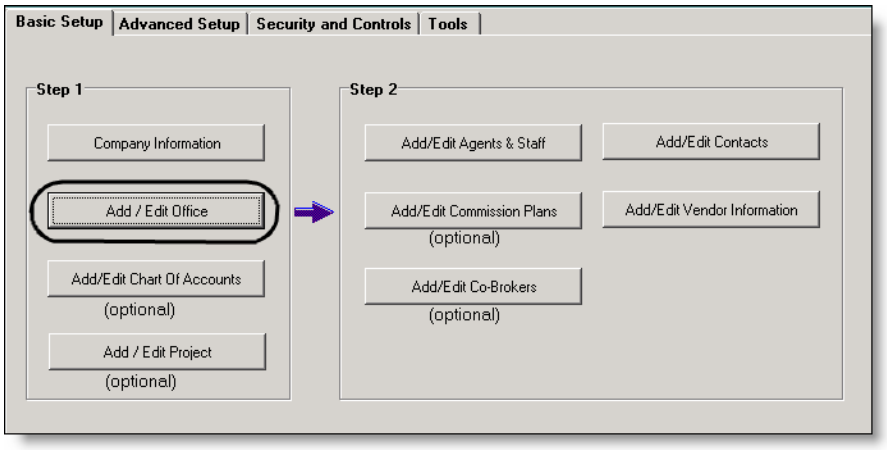
If you are printing 1099's with BOS, using it's accounting system, or interfacing with another accounting system, basic setups are completed on this "Accounting/1099's" form.



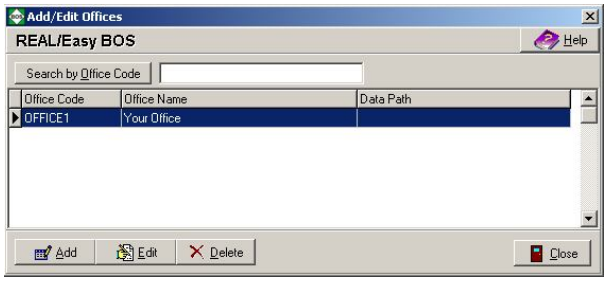
To assist the sales, billing and closing departments in companies who are using the accounting system or interface, the "Income Statement" and "Balance Sheet" tab setups should be used to define all key account defaults. Thus, when data is entered, the accounts in these screens are automatically assigned for the operators eliminating the nees for them to know the chart of accounts.

All settings are described in detail in the other training documents. Exit "Company Information" by clicking "Save" or "Cancel".

Step 2 - Looking at Office Setups

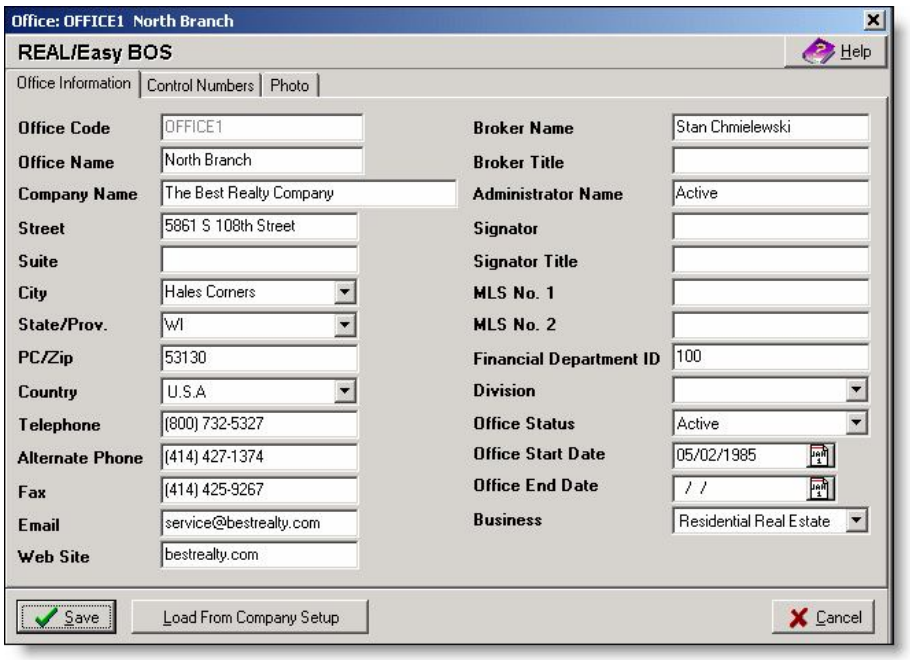


Click on 

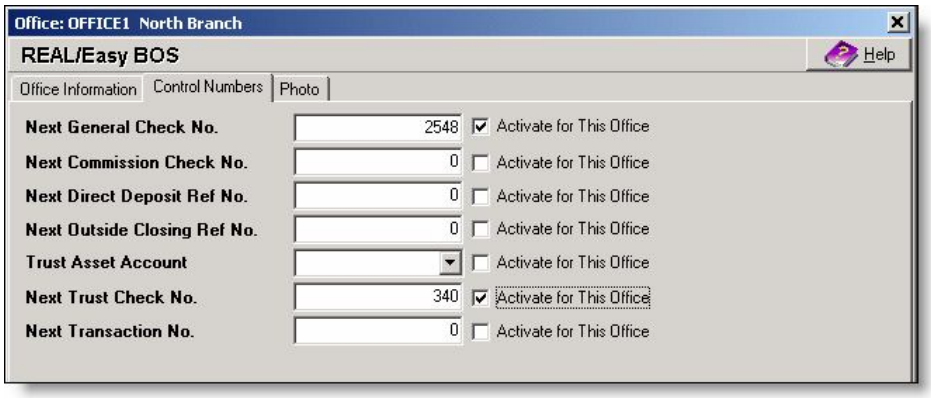


The Office table shows the offices already set up in your Company. When just beginning, there is just one office.

Click on 



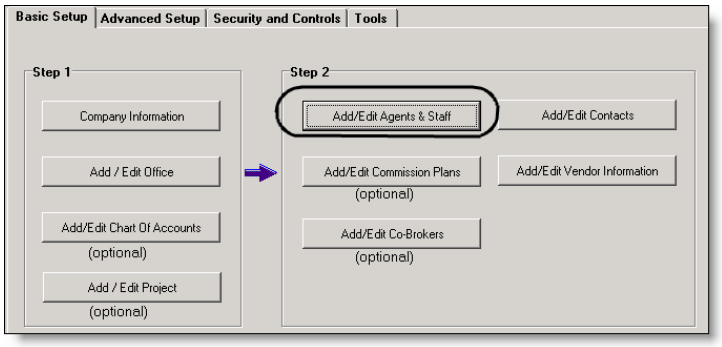
This is the Branch/Office “Office Information” tab for entry of the location demographics and other important information.



If your Company uses separate checks and Trust accounts by office/branch they can be designated here on the “Control Numbers” tab and activated.

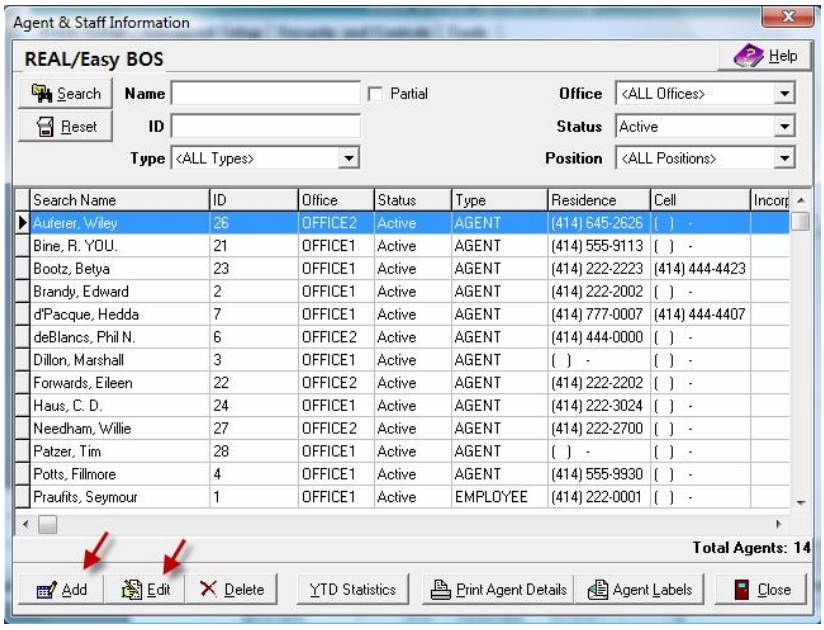
Step 3 - Looking at Agent Records

Next we'll look at the Agent setup screens. Click on Cancel.



Click on Add/Edit Agents & Staff command.

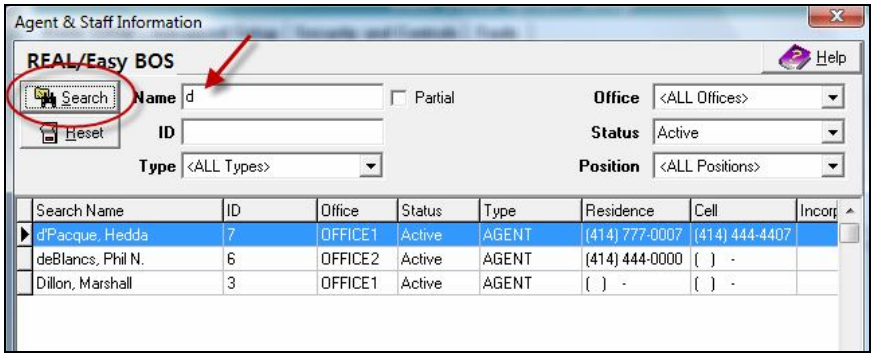
Before entering listings, sales, or billing, you must first enter your sales agents into the Agents & Staff table. So, let's step through how to do this.



On the main screen will be a browse type window where all of the agents you've entered into the company are listed. There is one row displayed for each agent you have entered. Besides the agent's name, there are other helpful columns, such as status, type, and phone numbers that are visible.

New agents are entered using the "Add" button, while existing agent records are viewed and updated by locating and highlighting that agent's record and clicking "Edit".

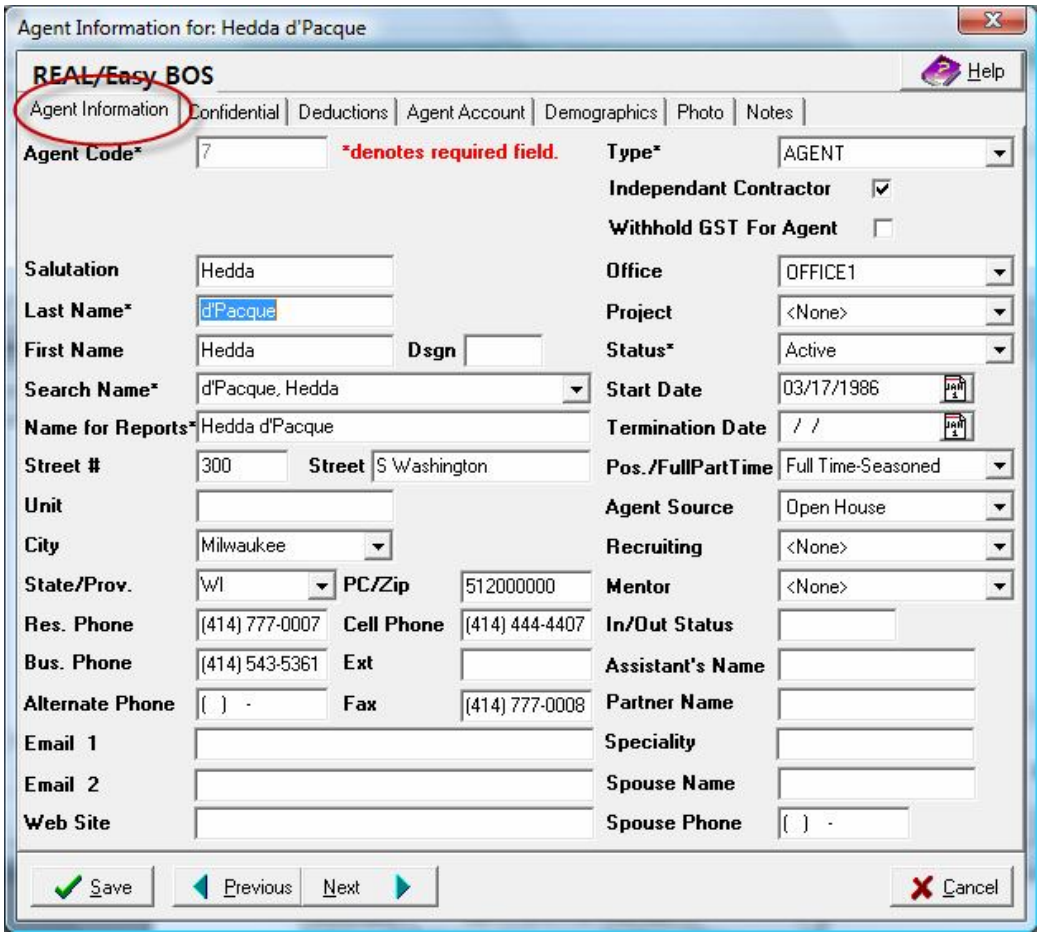
Many LookUp tables may be too large to just use your slider or arrow keys. By using the search box(s) at the top of the window, you can quickly locate the agent you are looking for. Say, you want to find agent Hedda d'Pacque.



In the name search area above, type "d" and press "Search". This will find all agents names starting with "d".

Your screen should now be highlighting the agent as shown above.

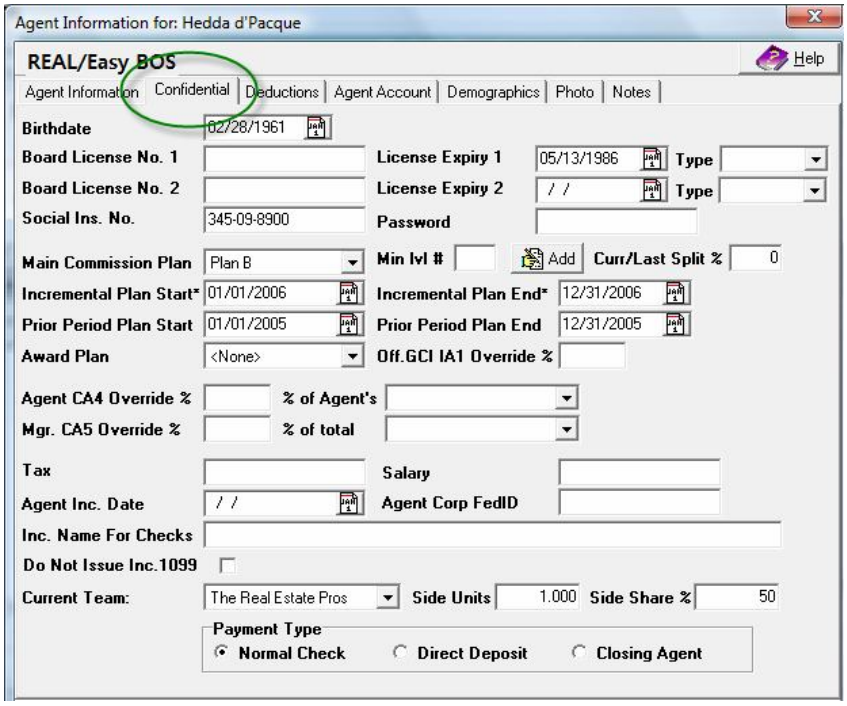
- Let's look at what information we have on Hedda, so double click on the highlighted name or click the Edit button.



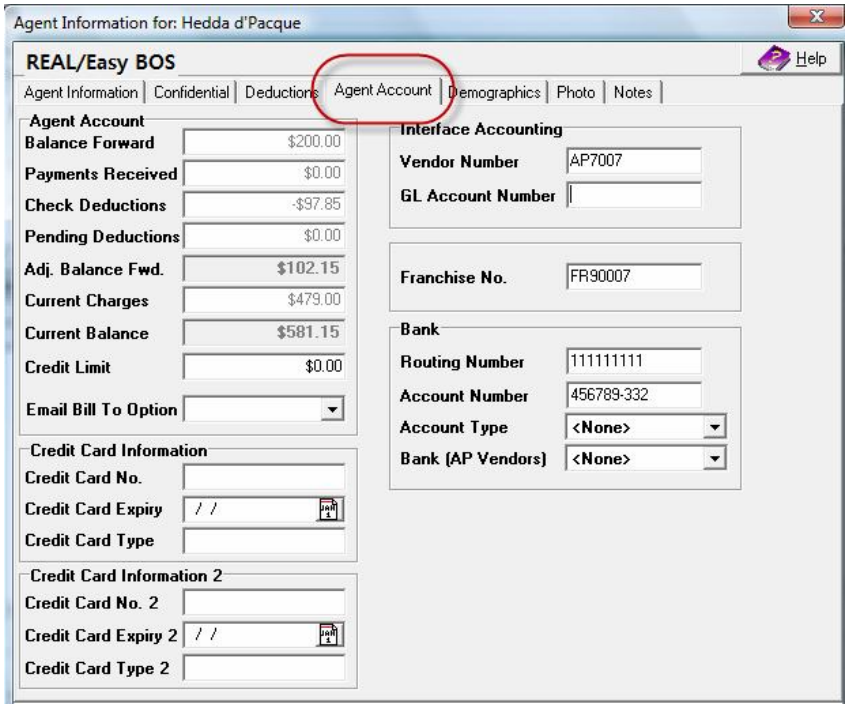
The selected agent record is now displayed and available for modification. Notice that window title (blue) displays the agent's name you are looking at. On the first tab, "Agent Information", your agent's address, phones and other information is recorded.

To change information highlight it with a **Mouse** click or use the **Tab** key to activate the item and then retype or edit

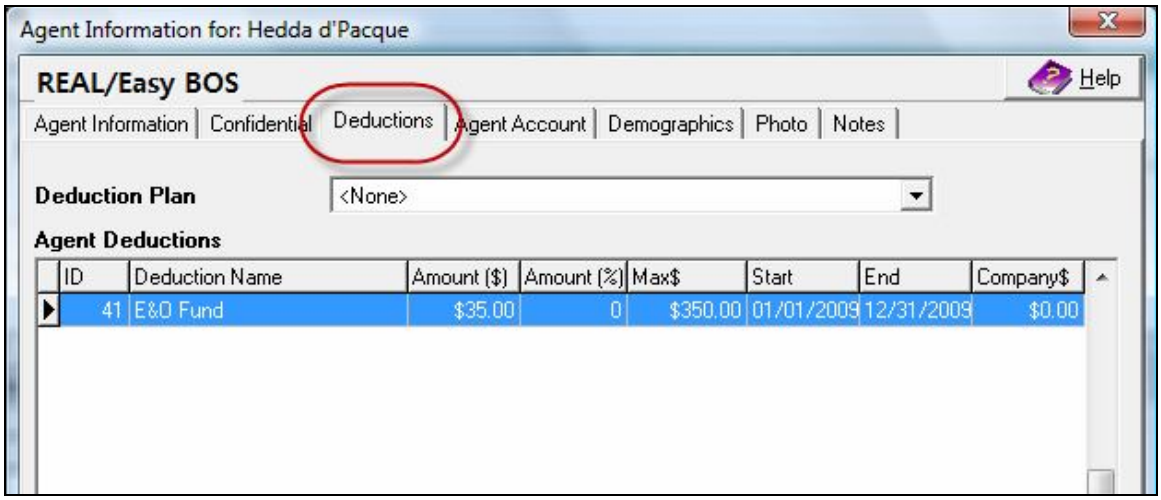
- Now, Click on the Confidential tab.



The confidential page of the agent's record shows important dates, license information, commission plan setups, incorporation ID's, and team assignment.



The "Agent Account" tab us used to display the agent's current account balance details. Other sections on the screen setup card numbers, vendor IS's for Interface Accounting, franchise ID for franchise reporting, Bank information for using direct deposit or MICR check printing, and credit card information if used to pay agent bills.

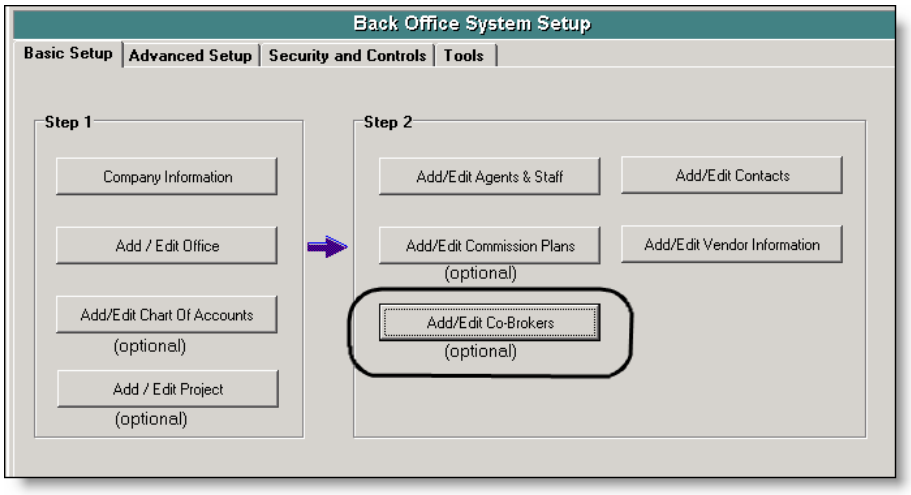


Use the “Deductions” tab to setup automatic agent check deductions.

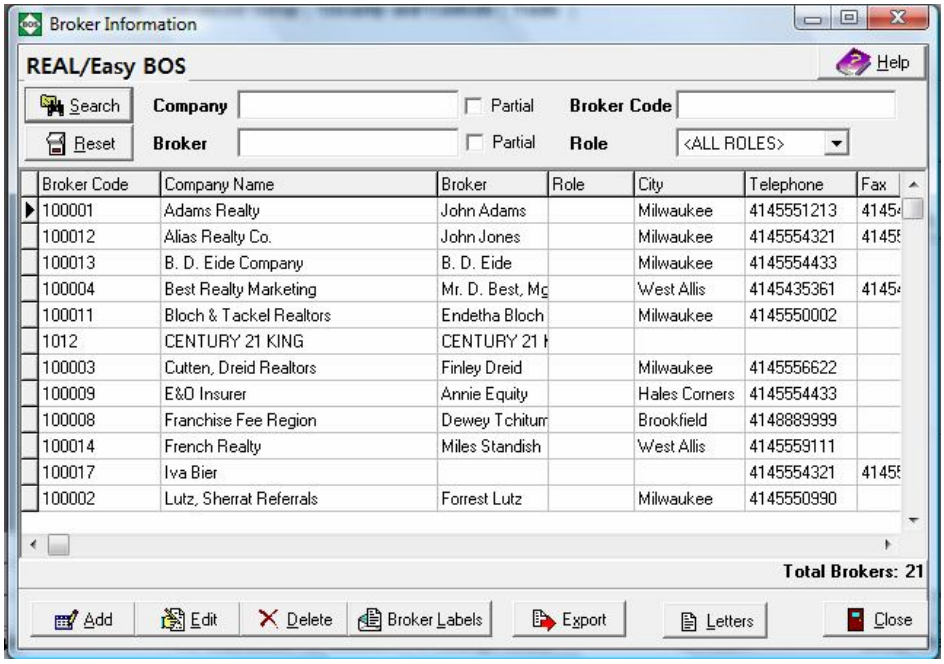
The “Demographics” tab contains a number of custom fields for your own use, “Photo”for agent photo(s), and the “Notes” tab for entry of miscellaneous information such as commission plan details, license updates, agent review summaries.

Click “Save” to return to “Basic Setup”.

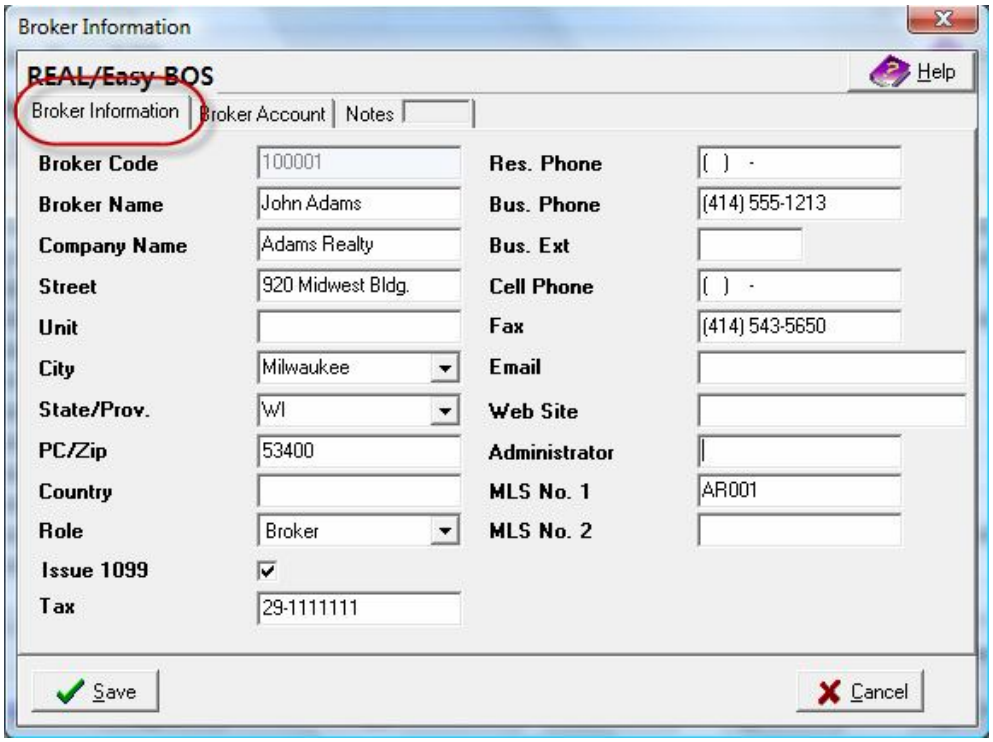
Step 4 - Co-Broker Information



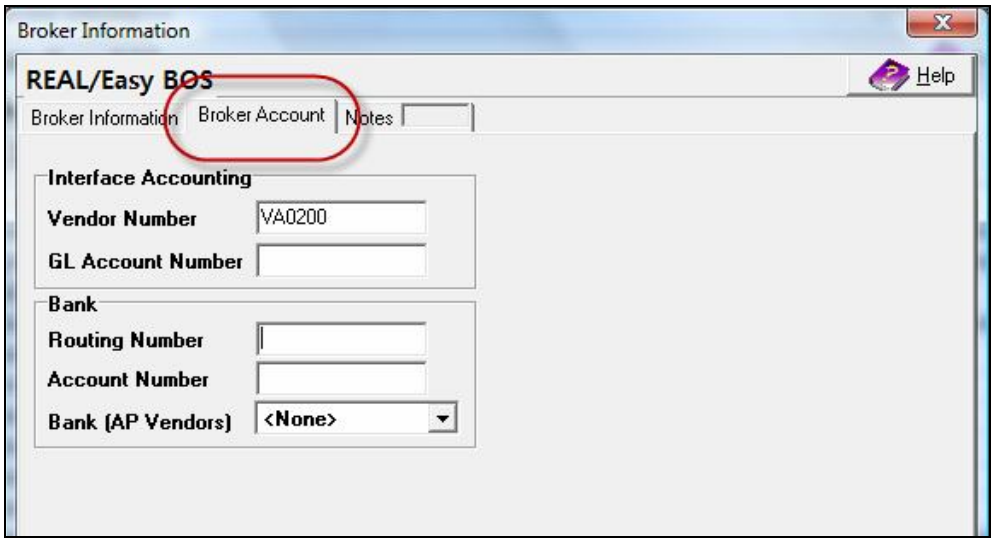
Click on Add/Edit Co-Brokers



This is the Broker look-up form. Click on Adams Realty and Edit.



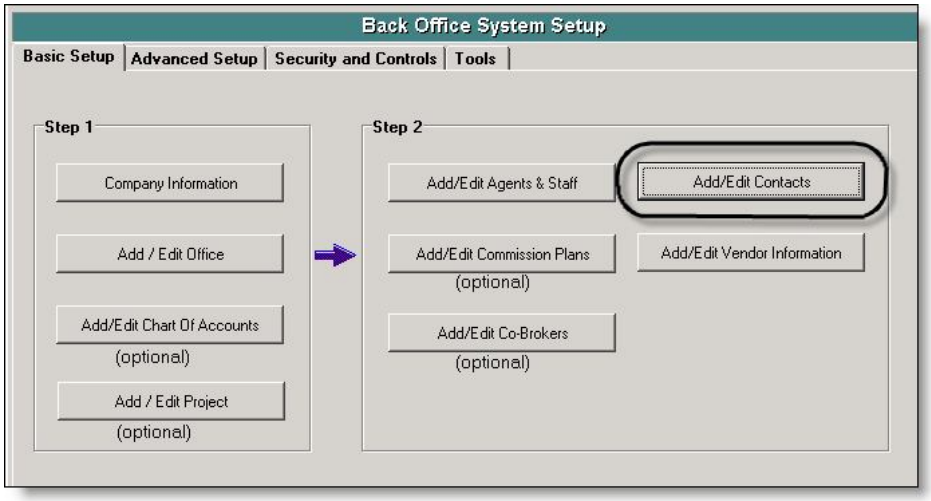
The "Broker Information" tab contains specific contact information and their tax number. You are also able to flag them for 1099's.



Use the "Broker Account" tab for Interface information, e.g. vendor number in the third party accounting system, or information for use of direct deposit and/or MICR check printing in REAL/Easy.

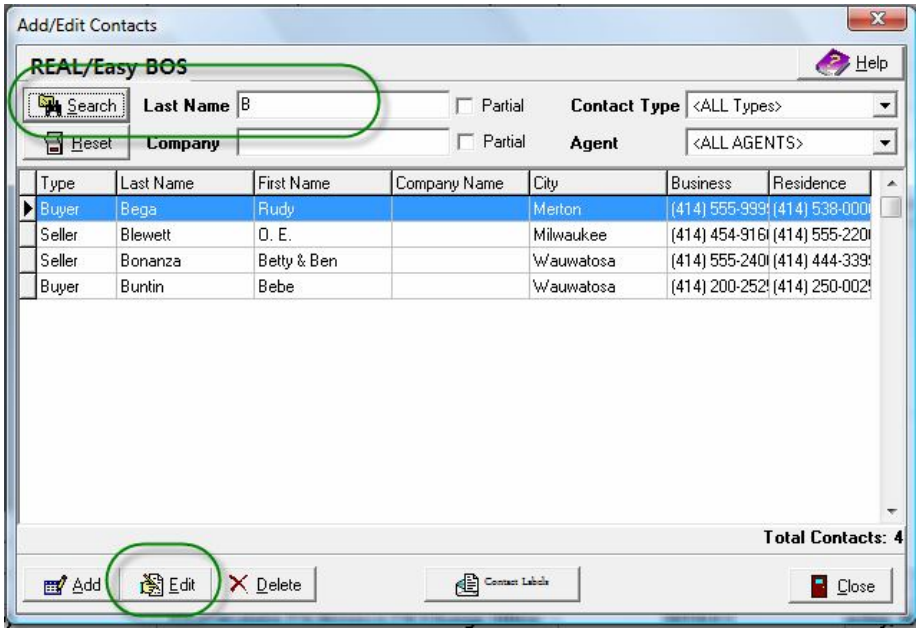
Use the "Notes" tab for miscellaneous information.

Step 5 – Main Contact Information (Buyers, Sellers, others)



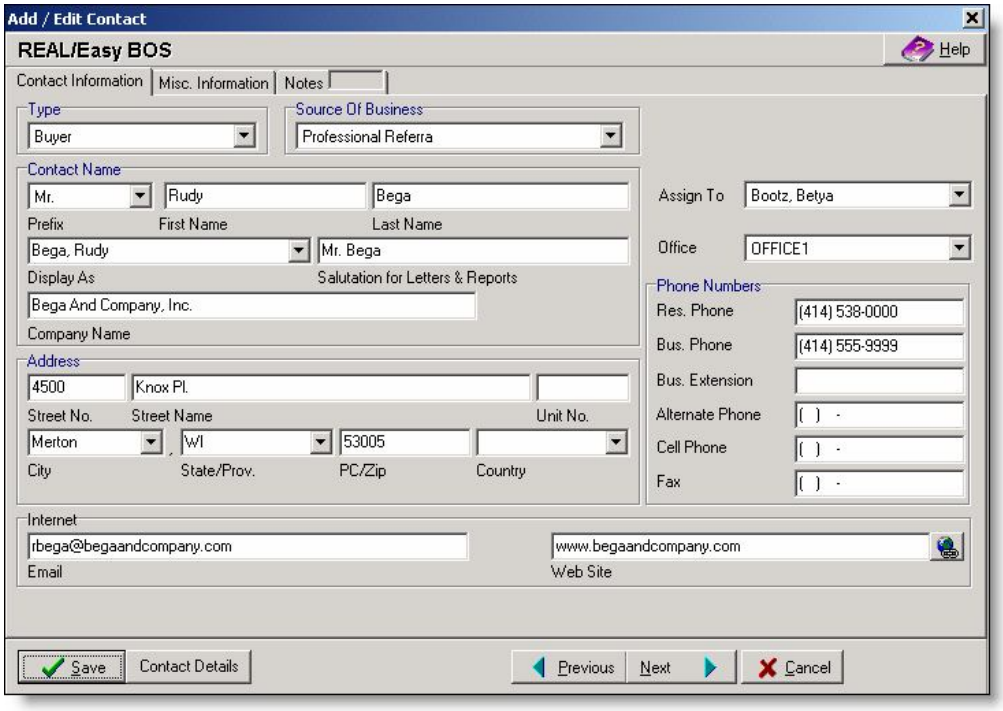
Buyers, Sellers, Title and Mortgage companies, Attorneys, and other outside contacts that are involved in the listings and sales contracts are called “Contacts” in REAL/Easy. Contacts can be stored the main contact list using the “Add/Edit Contacts” command within Basic Setup. Contact names stored here can be shared with or “pulled-in” to any listing or sale.

- Click on Add/Edit Co-Contacts. You will receive a blank search screen.



To locate a contact a portion of the name is entered and the “Search” button clicked.

- Enter the letter ‘b’ and Click on “**Search**”. This will display the contact list having names starting with that letter.
- Highlight and Edit the “Bega” record.

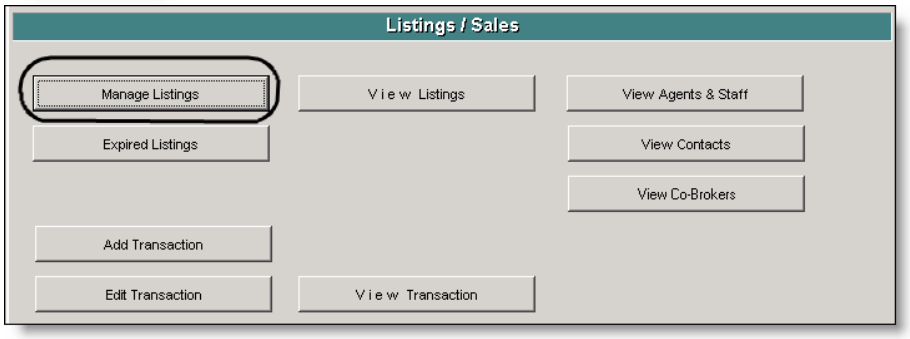


This is the Contact Information screen. The type of the contact is assigned along with the contact source. Name, address, and phone/email contact information is assigned on this screen.

The other tabs, “Misc Information” and “Notes” are used for details that might be important for working with the contact.

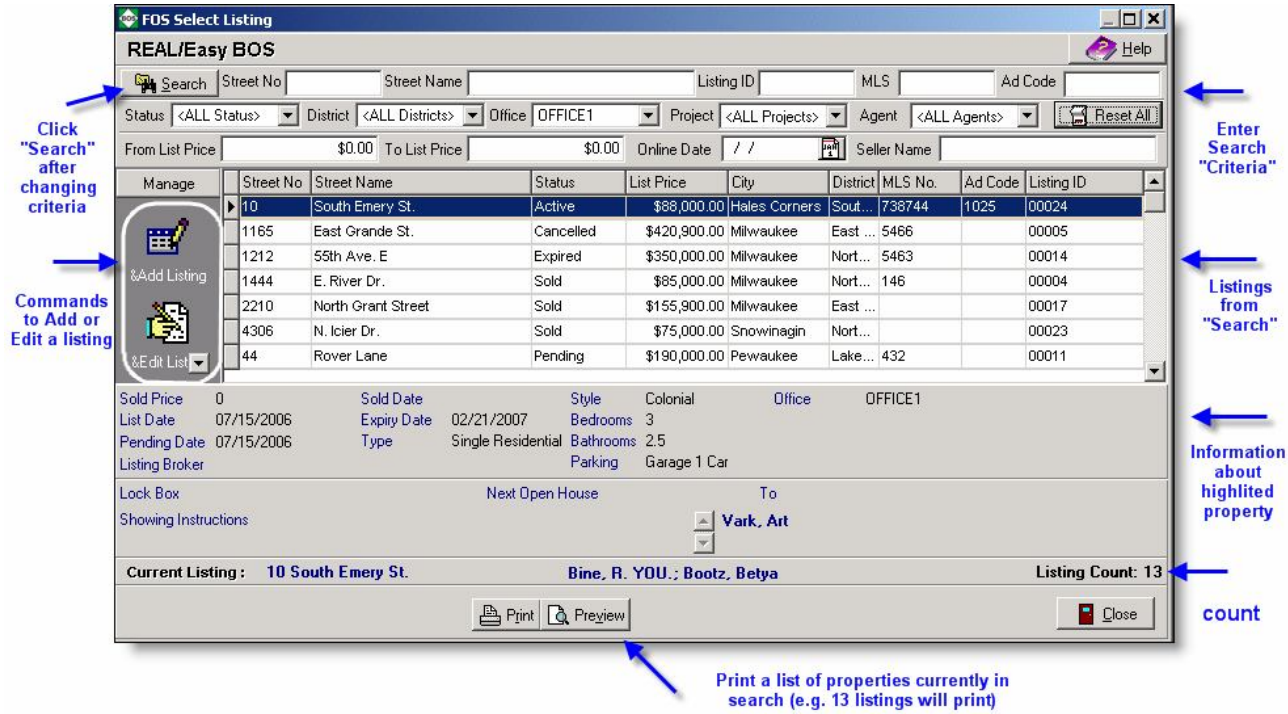
Click “Save: to exit the contact screens, and click “Close” on the following contact browse screen.

Step 6 - Viewing Listing Information



The company's listing production and inventory can be maintained and tracked in REAL/Easy. From your REAL/Easy BOS desktop:

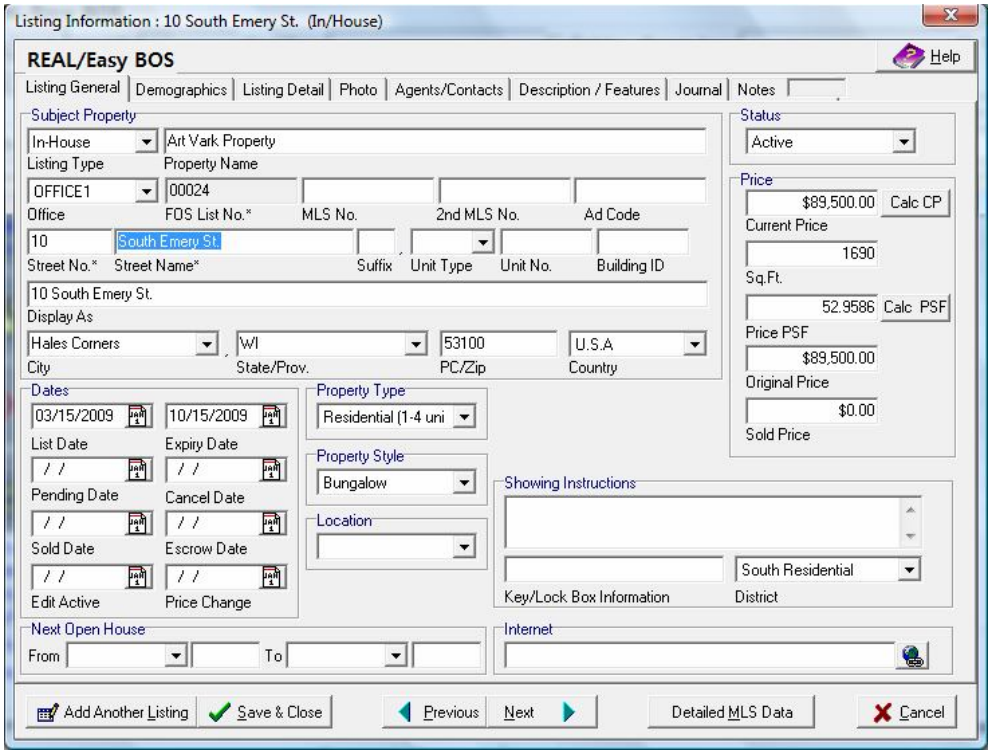
- Click on **Listings/Sales** on the **Menu Tool Bar**
- Within the Listings area, Click on **Manage Listings**



You should now see the listings browse in the main part of the screen. The list is sorted by the Street number. The first listing is highlighted and details about that property are displayed in the screen lower half. There are search boxes at the top of this window that can help you search for a certain listing or groups of listings e.g. "Active" or "Pending"

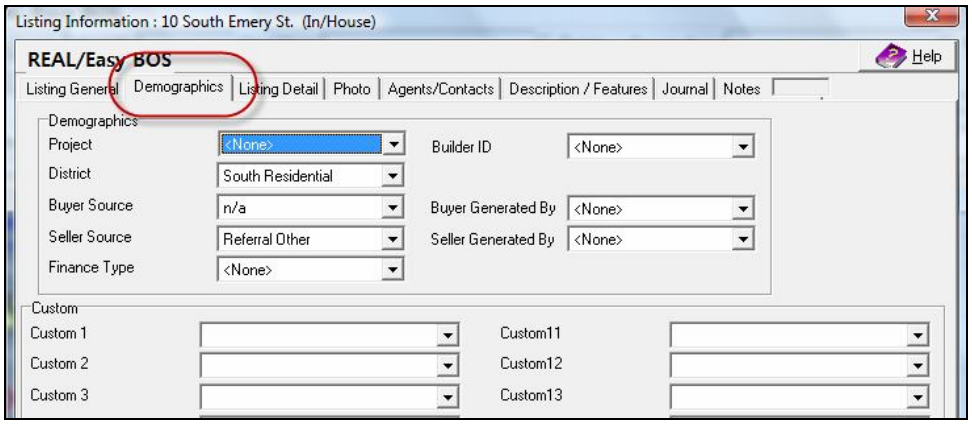
status only.

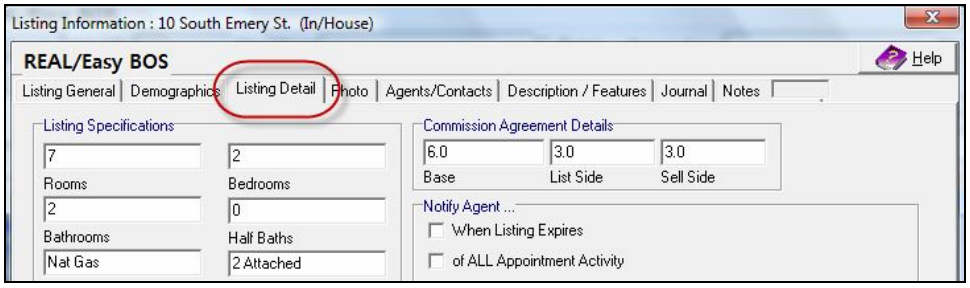
- Point to and double click on the South Emery St property - (You can also use the Edit button at the left side when the property is highlighted).

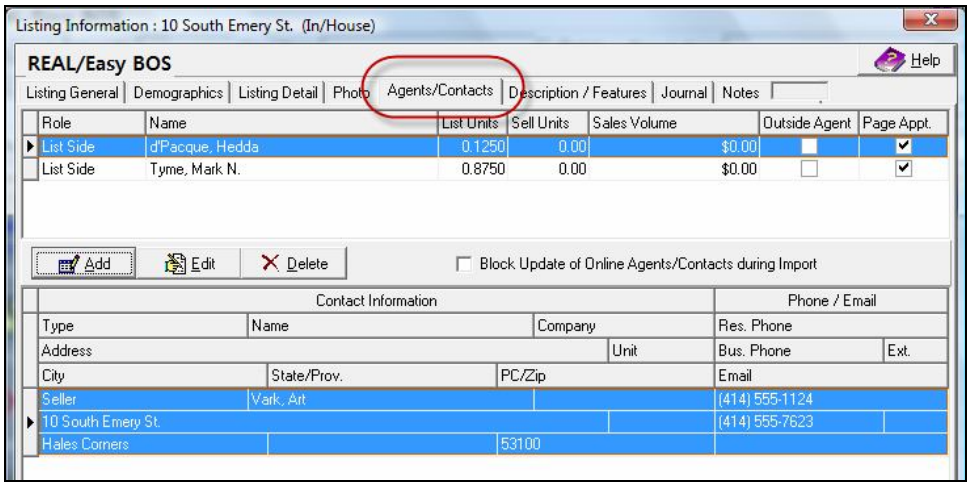


Key listing details are maintained within the “Listing General” tab. Included are key identification ID’s, detailed address information, the property status, current price, key dates including listing and expiration, the main listing office, and property type.

You can keep other information including the showing instructions, url location, next scheduled open house, if you are using REAL/Easy to assist the call or updesk.

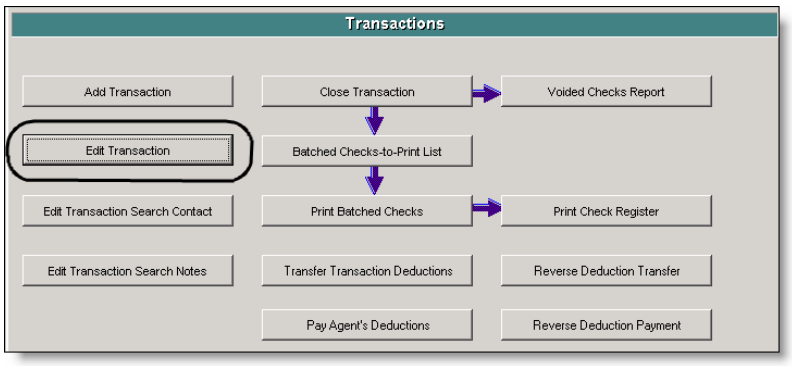






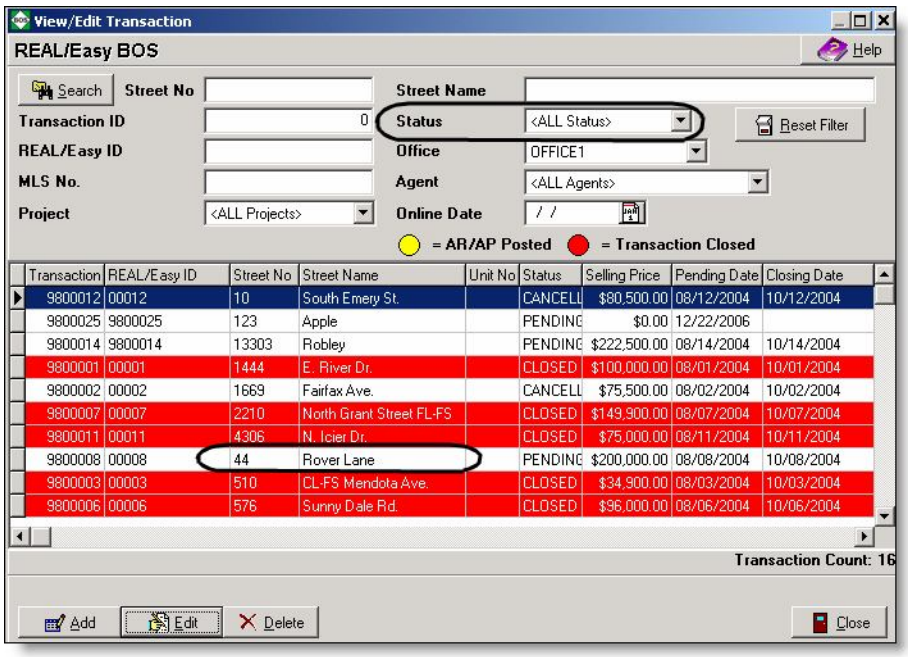
Other ***"tabs"*** of information include Demographics for source and custom fields, Listing Detail for number of rooms, living space, and key amenities, Agents/Contacts for the listing agent(s) and names and contact information of the seller(s) and others involved with the listing.

Step 7 — Viewing Sales Information



From your REAL/Easy BOS desktop:

- Click on **Transactions** on the **Menu Tool Bar**.
- Within the Transaction area, Click on **Edit Transaction**.



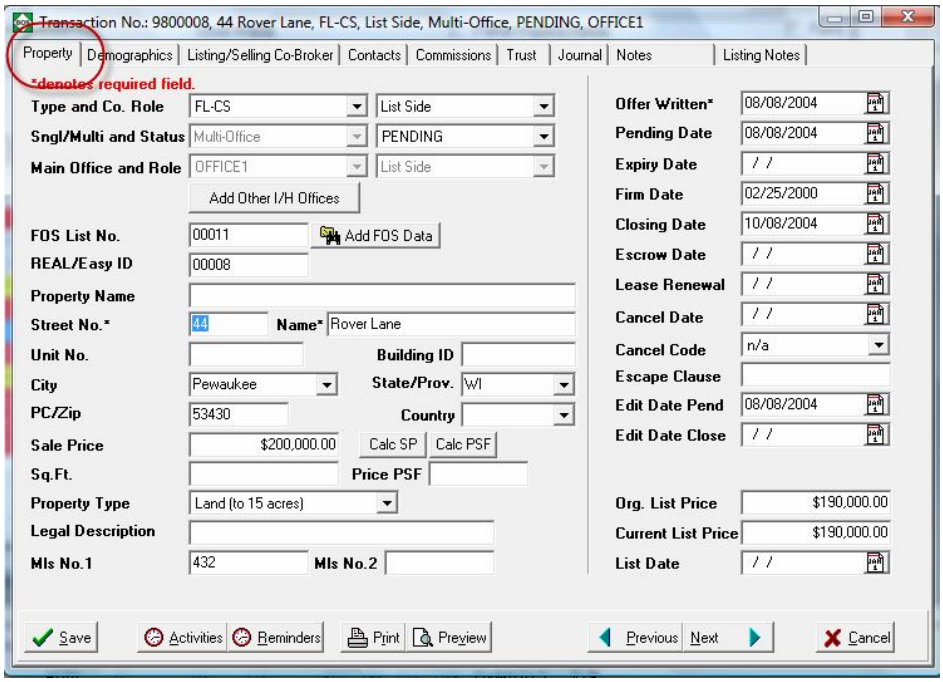
Make sure the Status drop down on the top of the window is set to “All Status”.
Then press Enter or click “Search”.

You should now see the transaction table. Above, the lookup is sorted by the Street name. Some notes about this lookup. In REAL/Easy BOS, each sale has a transaction number.

They are consecutively numbered by REAL/Easy BOS automatically

There are search boxes at the top of this window that can help you search for a certain transaction.

- Now, double click on the Rover Lane property - transaction number 9800008. (You can also use the Edit button).



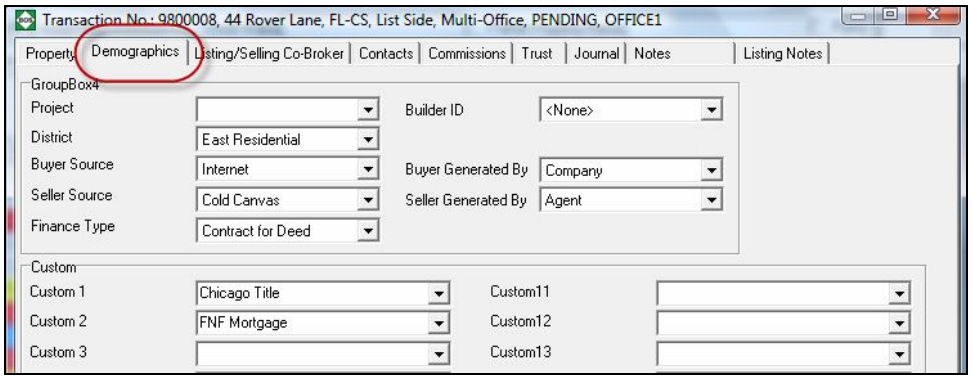
You should now be viewing information about 44 Rover lane. There are 5 tabs, or screens, of information. The first, shown above, is called the Property tab. Note this key information displayed at the top left of this screen:

- The sale “Type” is “FL-CS” meaning “Firm List – CoBroke Sale” – each transaction is assigned a sale type. You can use the installed types or add your own in “Preferences”.
- The Company Role is “List Side”
- The sale is a “Single-Office” sale meaning that only one of our (in-house) offices are involved in this sale.
- The status if this transaction is “PENDING”. Status can be “Backup Offer”, “Closed”, “Cancelled”, “Firm” (ready for closing).
- The main office is “OFFICE1” and that office’s role is “List Side”. (Note for multi-office transactions a main office is selected.

The remainder of this screen is used to maintain and view all key information about the transaction.

Note the **REAL/Easy ID** field. Data conversions from other databases or systems will put the old Transaction # here. Or you can use this ID field if you prefer alpha-numeric numbers.

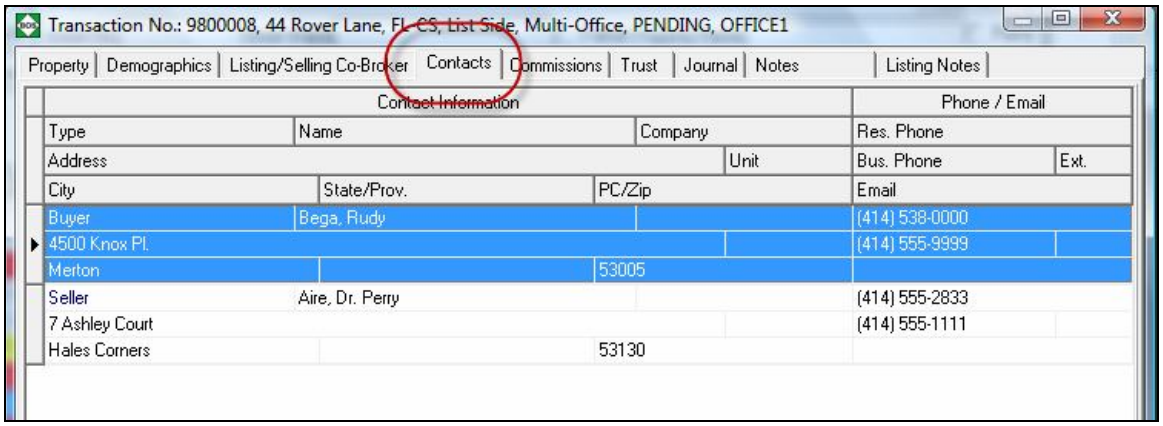
- Now, let's view the next tab: click the "**Demographics**" tab.



This tab is used to indicate optional information that can be useful for sales reporting and special tracking such as for the sources of your buyers and sellers. There are 10 "Custom" fields that you can define for your own use to track special promotions or categories or use of affiliated services.

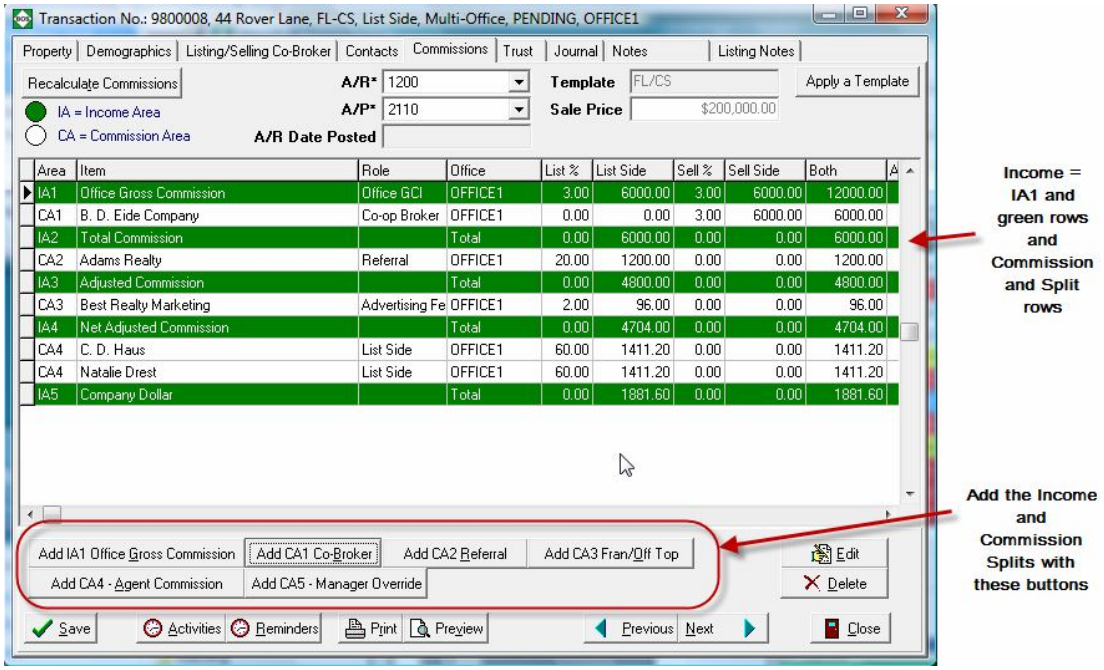
For customers who use the online intranet/mls import module, the "Online" section will display details about the property gathered from that system.

- Now, let's look at our buyer/seller information: Click the "**Contacts**" tab.



The screen should appear as above with the buyer and seller names and basic contact information. Other contacts such as title, mortgage, attorneys can be maintained. Note that you can also print mailing labels and form letters to the contacts.

Next, let's view this sale's commission revenue and split details, Click on the **"Commissions"** tab.



In this spreadsheet-like display, the green rows show revenue and the white fees and commissions. You can scroll up and down if needed and left and right.

The Rows start with "IA1" ("Income Area 1") the office gross commission income. This is the total income for the transaction). The rows continue with the transaction's other revenue, fees, and commissions providing different sub "Total" rows all the way down to the "Company Dollar". Rows can be highlighted and edited or added by using the buttons at the screen bottom.

Columns for each row include:

Area: an "abbreviation" that defines what kind of Income or Commission line the row is "IA" means income area, and "CA" means commission area.
Item: Description of the income or commission row.
Role: This is assigned by the operator to help identify the income or commission. A set of roles are provided and you can add your own within "Preferences".
Office: is the in-house (your company) office/branch/profit center that the income or commission applies to. If incomes and commissions involve multi-offices then you will enter separate rows for each. For subtotal rows this is labeled "Total".
List%: the percentage or split used (if any) to calculate the list amount. Note the 20% "Referral" and the 60% agent splits.
ListSide: this is the list side income (green row) or commission (white row) amount.
Sell%: the percentage or split used to calculate the sell (buyer) side amount.
Sell Side: this is the sell (buyer) side income or commission amount.
Both: total income or commission for the row.

You can observe that total income down to net commission/company dollar is tracked with standard real estate accounting breakdowns. Total income is entered first using the "IA1 - Gross Commission Income" button.

In order to make REAL/Easy BOS reporting and tracking more valuable to owners and managers we have setup these income and commission areas:

IA1 "Income Area 1", is the **Office Gross Commission** incomes from the commission generated by the transaction from all sources whether the seller , buyer broker commissions, bonuses, referrals paid to the company etc. Note that each revenue "type" can be entered and identified by it's own "Role".

CA1 or "Commission Area 1", is usually the **commission paid to cobrokers**. This area can also be used to pay MLS fees and agent bonuses from sellers or buyers.

IA2 or "Income Area 2" is calculated for you IA1 less CA1 and is called Total Commission or "**GCI**" – **Gross Commission Income**. For accountants, this revenue is usually the figure credited as the transaction's income.

CA2 or "Commission Area 2", is used to track relocation and **referral fees** paid.

IA3 or "Income Area 3" is calculated for you as IA2 less CA2 and is called **Adjusted Gross Commission Income**, or "**AGCI**". If you are a franchise member, this is the amount subject to fees.

CA3 is used to record other **off-the-top franchise** royalties, commissions, fees, and allocations. These can include marketing and advertising fees, client follow-up contributions, E&O account allocations. If you are a member of a Franchise, these fees are usually entered first in CA3.

IA4 Net Adjusted Gross Commission Income, or "**NAGCI**", is calculated for you as IA3 less CA3. This also called Net In-House revenue. For most companies agent splits are calculated on this row – NAGCI.

CA4 Commission Area 4, is the **agent commission** area. For most companies this is the agent gross earnings calculated from the commission and is also the 1099 earnings that can be reported or efiled by REAL/Easy.

IA5 is **Company Dollar** and is calculated as (Net Adjusted Commission Income) less (agent commissions), or IA4 less CA4.

Area	Item	Role	Office	List %	List Side	Sell %	Sell Side	Both
IA1	Office Gross Commission	Office GCI	OFFICE1	3.00	6000.00	3.00	6000.00	12000.00
CA1	B. D. Eide Company	Co-op Broker	OFFICE1	0.00	0.00	3.00	6000.00	6000.00
IA2	Total Commission		Total	0.00	6000.00	0.00	0.00	6000.00
CA2	Adams Realty	Referral	OFFICE1	20.00	1200.00	0.00	0.00	1200.00
IA3	Adjusted Commission		Total	0.00	4800.00	0.00	0.00	4800.00
CA3	Best Realty Marketing	Advertising Fe	OFFICE1	2.00	96.00	0.00	0.00	96.00
IA4	Net Adjusted Commission		Total	0.00	4704.00	0.00	0.00	4704.00
CA4	C. D. Haus	List Side	OFFICE1	60.00	1411.20	0.00	0.00	1411.20
CA4	Natalie Drest4	List Side	OFFICE1	60.00	1411.20	0.00	0.00	1411.20
IA5	Company Dollar		Total	0.00	1881.60	0.00	0.00	1881.60

Let's look at the splits for this sale.

The $12,000 income generated from the transaction is shown in the IA1 line(s). This was a FL-CS sale with each side, Best Realty on the list and a cobroker (B.D.Eide Company) on the sell (buyer) side, receiving 3% or $6,000.

The B.D.Eide Co-broker's split for $6,000 is entered in the white "CA1" for the sell side.

This leaves Best Realty with $6,000 of list side revenue – this is IA2 Total Commission row (also called GCI).

CA2 contains a list side referral fee to Adams Realty. You can see that it was 20% of $6,000 or $1,200.

IA3 shows the list side and total Adjusted Gross as $4800. This is also called "AGCI".

Then CA3 lines are used to enter off the top fees marketing fees. In this example Best Realty Marketing receives or allocates 2% or $96. If Best Realty was part of a franchise, that fee would be entered here also.

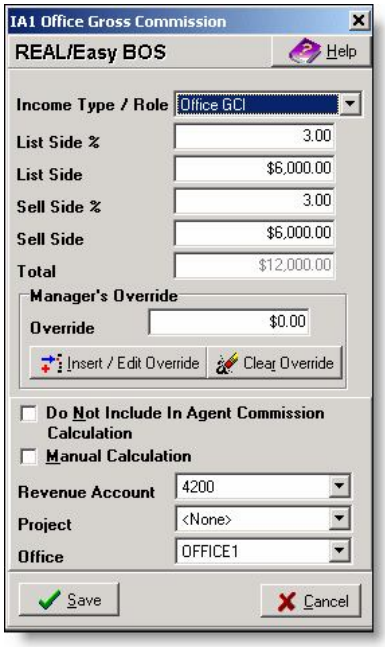
IA4 shows the Net Adjusted Commission Income (NAGCI) after CA3 of $4,704.

CA4 shows agent commissions. Note that this is a split listing having two agents, C.D. and Natalie. You can see that each agent was paid at a 60/40 split.

IA5 shows Company Dollar, the income left to cover the company's fixed expenses and create profits. The company dollar for the transaction is $1,881.60.

To make changes or view these entries, the Edit button (on bottom right) is used.

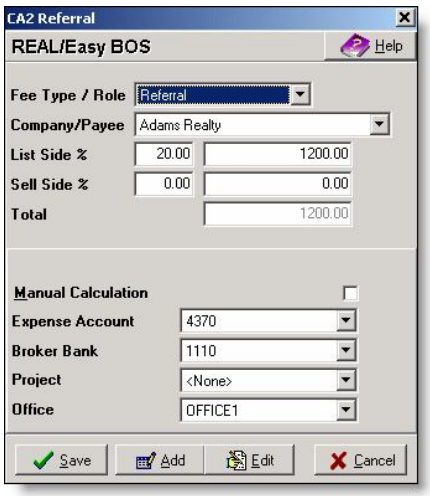
- Now, let's view how the total revenue is entered – **Highlight the IA1** line and click the "**Edit**" button.



Above, illustrates the IA1 entry. If the commission income is based on list and/or sell side percents, then the operator would just enter the percent(s), e.g. 3.0, and the amounts will be calculated. If the amounts are fixed amounts and not based on a percentage, then the operator does not enter a percent, only the amount.

On the lower portion the revenue account is identified (important only if you are using REAL/Easy's accounting or posting to your accounting system) as well as the office/branch that is to credited with the income.

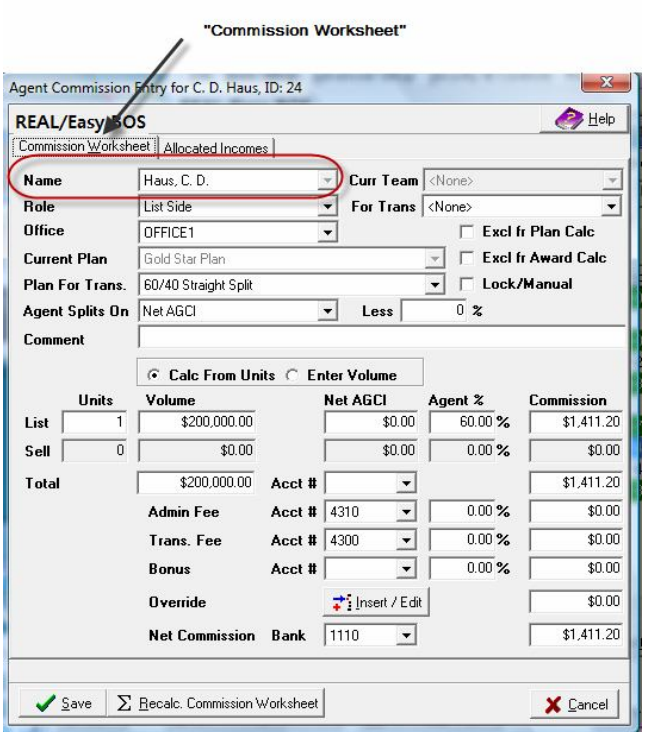
- Click "Cancel" or "Save" to return to the "Commissions" tab.
- To view how the referral was entered, **Edit** the **"CA2" Adams Realty** white fee row:



On this screen, the role or fee type is set to "Referral" and the payee is identified from the brokers table to be "Adams Realty". 20% is entered for the split to calculate the $1,200 amount. Note that the fee is allocated to "OFFICE1".

Click “Cancel” or “Save” to return to the “Commissions” tab.

Let’s view an agent commission entry. **Edit** the **CA4** agent **Haus** commission.

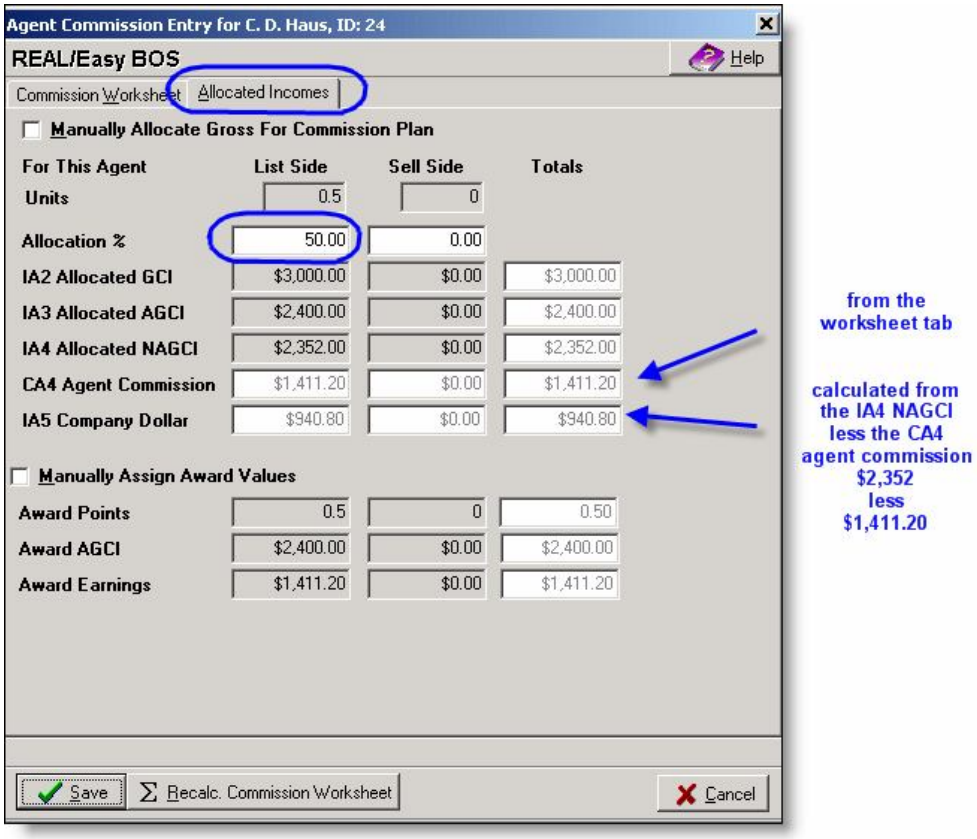


Now you should see the detailed information for Haus’ commission above. There are tow tabs: “Commission Worksheet” and “Allocated Incomes”.

Note for the **Commission Worksheet**:

- Agent Haus is on the “**List Side**” and “**OFFICE1**” will be paying the commission.
- The agent is currently assigned to the “Gold Star” commission plan but this transaction is being paid by another plan “60/40 Straight Split”. This might be because there was a referral.
- The agent is **splitting on** the “**Net AGCI**” figure of “$2,352.00”. Do you see this?
- The **agent’s split is 60%** for a gross “Commission” earnings of $1,411.20.
- The agent received “0.5” units and this is used to calculate the volume of “$100,000”.

Click on “Income Allocations” tab



The incomes generated by the transaction are allocated to the agent on this tab. Why? For a number of reasons:

First: to provide the "Split-On" figures for the commission plan or an entered percent to use.

Second: to calculate the company dollar generated by the agent – i.e. treat the agent as s profit center.

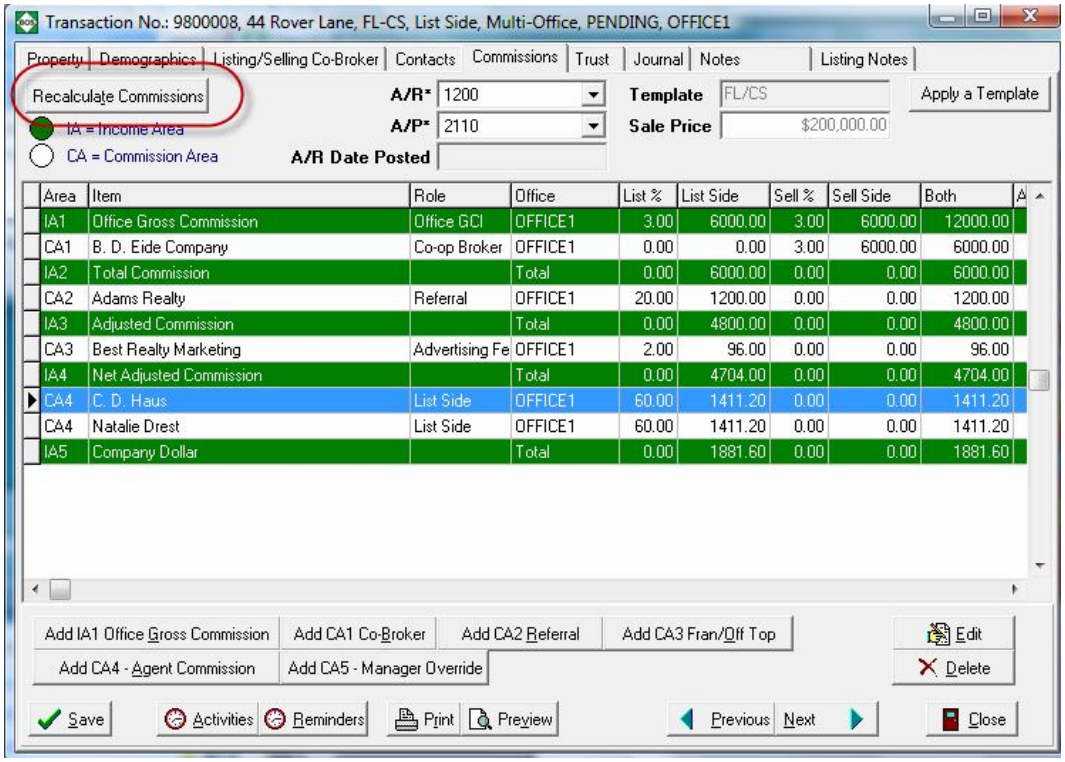
Third: to provide figures needed to calculate moving commission splits for some commission plans. Plans can be based on agent earnings, GCI, AGCI, NAGCI or Company Dollar so these figures need to be calculated or entered.

Note here that the agent is allocated 50% of the list side income, so the operator entered the "50%" allocation figure.

- **Click on Cancel** or Save to return to the Commissions tab..

Note that there was a “ReCalc Commission Worksheet” button. This is used to recalculate an agent’s commission in the case that changes were made on the screen or if a referral was added or a sale price changed. “ReCalc” is always used with closing a sale.

When you re-calculate the agent or the transaction entire commission tab, that many calculations are completed by REAL/Easy BOS. First, all of the revenue allocations are done for the agent record. Then, if the entries affect any other split calculations, those are done as well. Next, the summary calculations for the overall sale’s commission page are re-done.

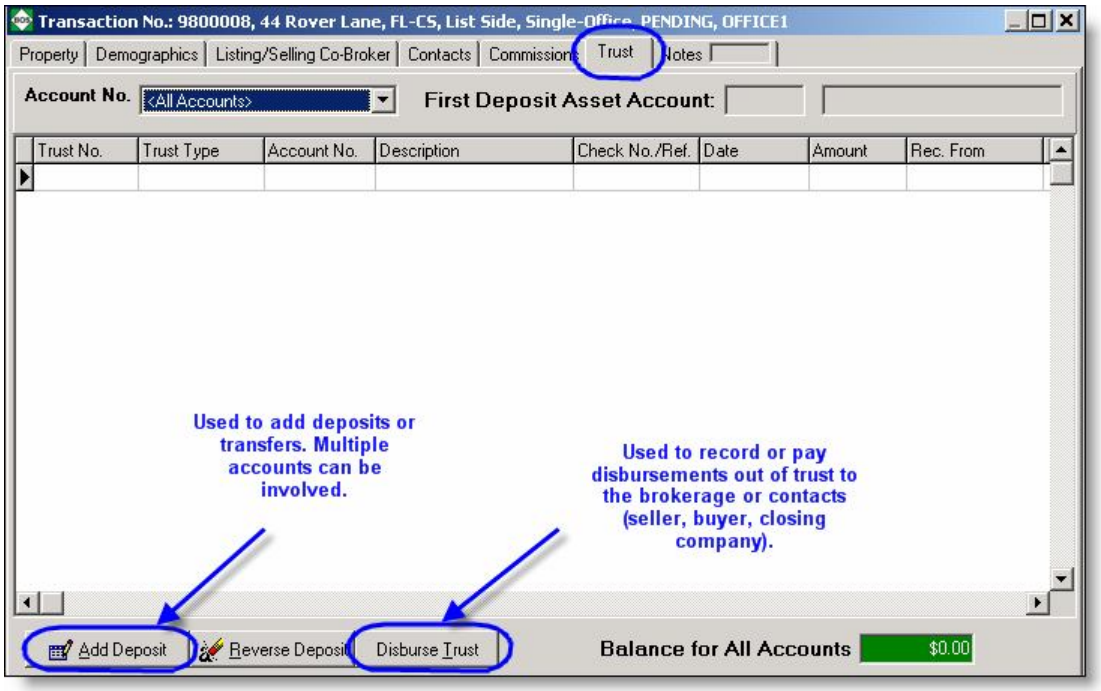


You should now see the screen similar to the one above. If you had made any changes or new entries, this screen would have been re-calculated for you.

If you are using Trust/Escrow Accounting, got to the next Step.

- Click on the Trust tab
- If not, click “**Save**” on the screen lower left to return to the transaction search screen and turn to “**Step 8**” in this tour.

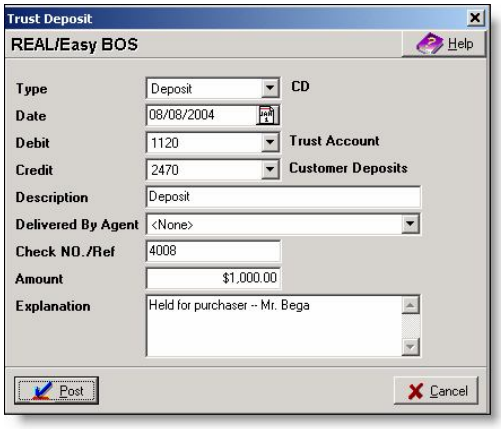
Step 8 - Trust Accounting



The Trust area is used to record all trust monies received, transferred, and disbursed for the transaction.

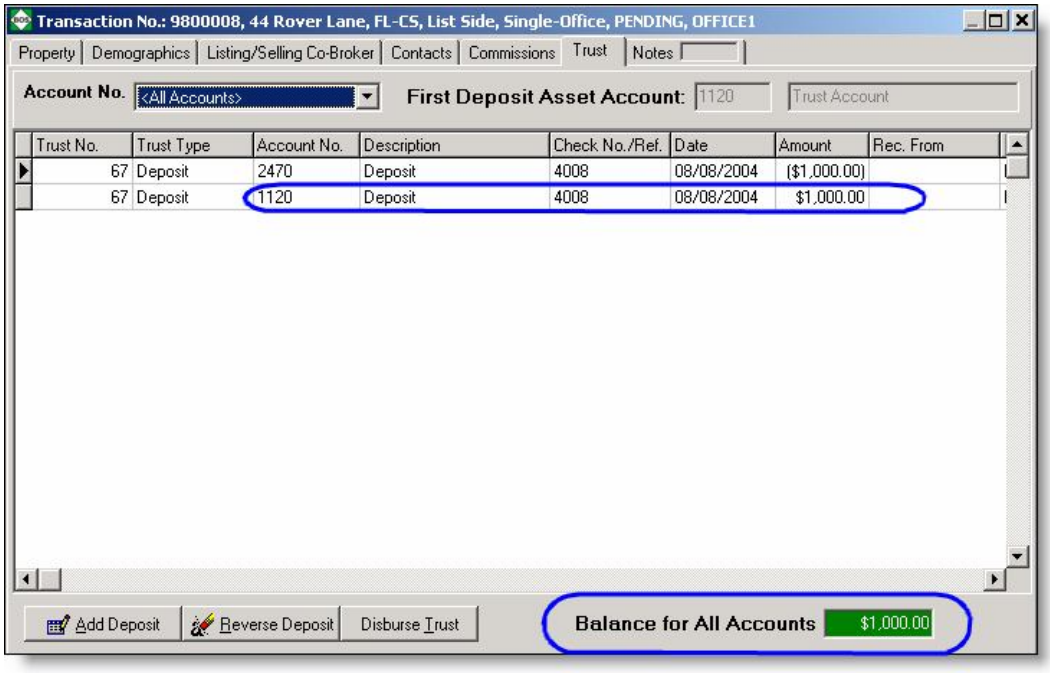
- Click on 

to add a deposit



Here the deposit is entered with the debit and credit accounts being identified, the deposit date entered with the amount the check number of the payee. Descriptions and Explanations are provided by the system but can be re-typed or added to.

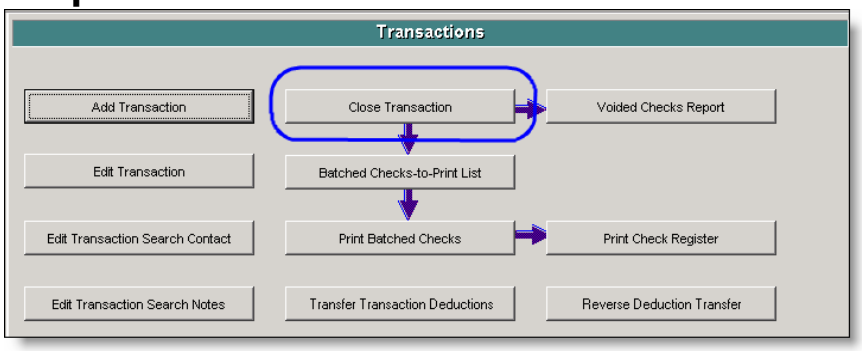
Click on “Post” to add the deposit and calculate the transaction trust/escrow balance.



The transaction now has a escrow/trust balance of $1000. Note that the system does "double entry" accounting – the 1120 trust asset account receives a $1,000 debit while the 2470 trust liability account receives the credit amount.

At closing, the trust balance is disbursed using by posting or writing a check. Note that there are a number of trust check formats pre-built into REAL/Easy for bottom, middle, or top check forms.

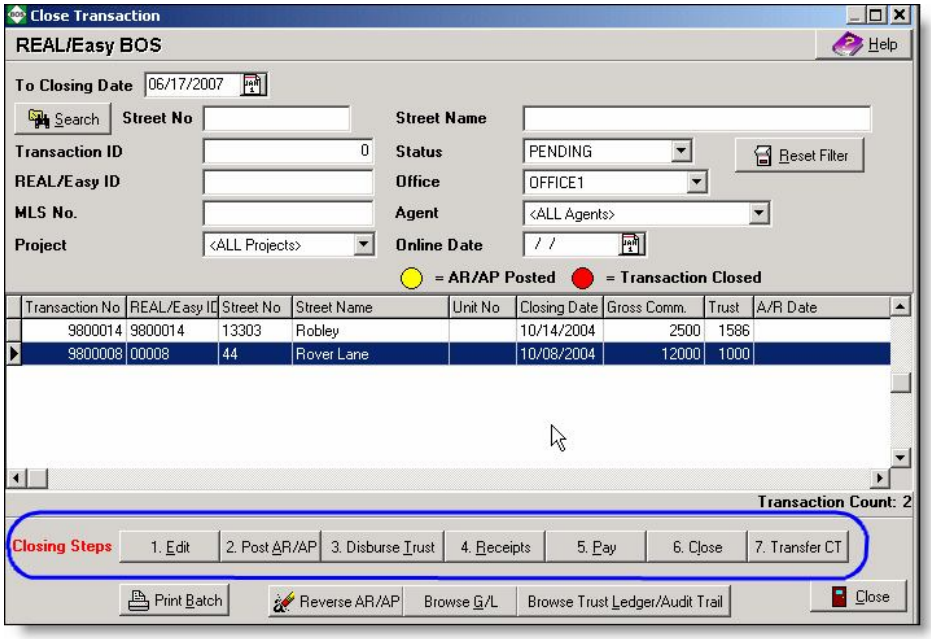
Step 9 - Close Transaction



With this step we will briefly cover how you can process your closings using REAL/Easy.

Note that "processing a closing" can be anything from simply changing the status of the transaction to closed, which takes about two seconds, if that's all you want to. Or handling all escrow/trust disbursements, recording commission receipts, paying all agents and brokers, and posting all of the income and expenses for REAL/Easy's or your own accounting system to pickup.

Click on 



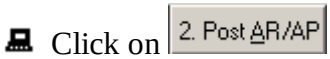
This is the Close Transaction browse window. Note: There is a date field in the upper left. If you can't find the property you are looking for, either the close date on that transaction is later or it is missing.

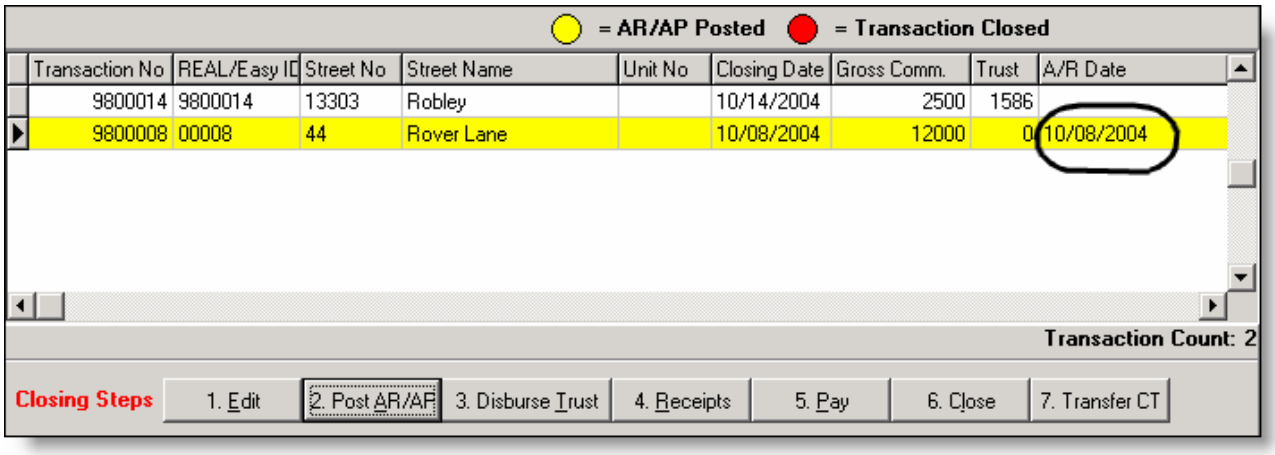
Near the bottom are the steps to closing a transaction. These are buttons numbered 1

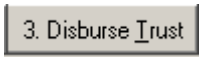
through 7. You may choose to use one or more of these functions.

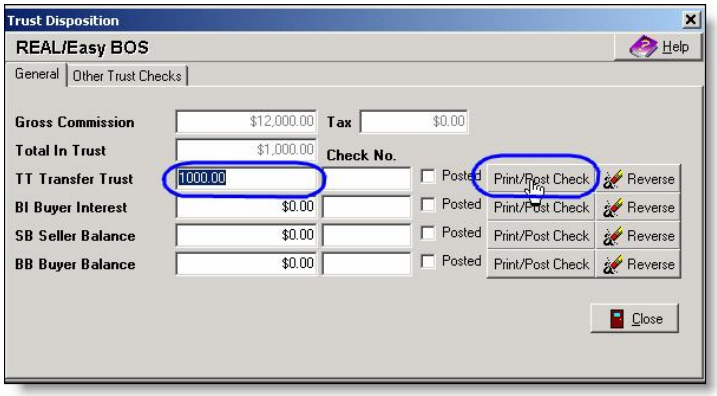
The first order of business is to "**1 Edit"** the transaction. First you want to verify that all information is correct. Any changes in financials should be done now, such as selling price, close date, agent additions or commission changes. Save when completed.

If you are using the BOS GL or posting to your accounting system or you are using commission plans that require a commission to be posted to count, the next step would be to post to AR/AP.

Click on 

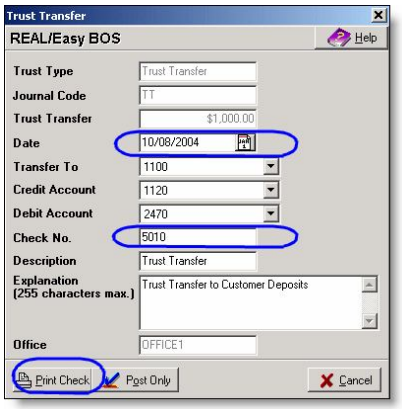


After the AR/AP is posted, if you are using Trust Accounting click on 

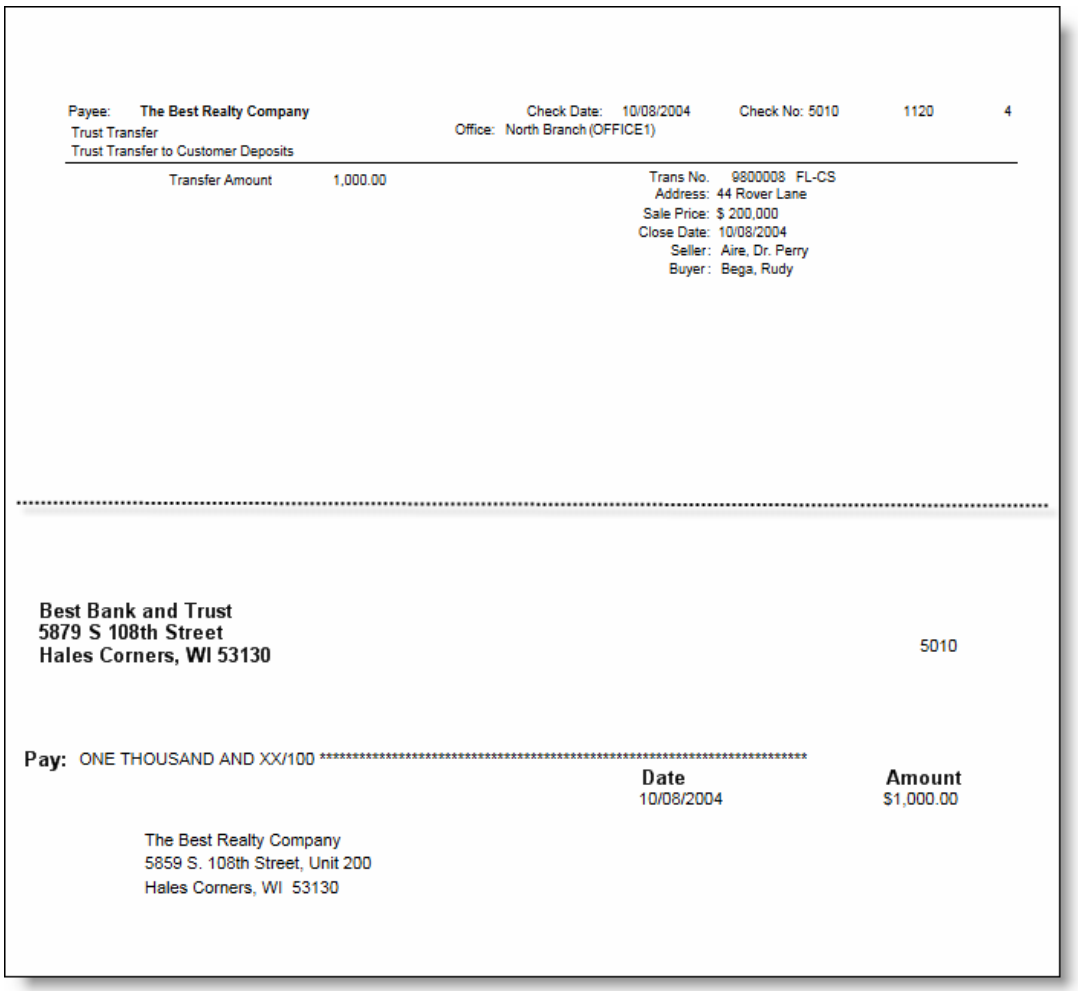


On a normal closing you would Trust Transfer to your bank operating account.

- To print this check for deposit, enter the Transfer amount line and Click "Print/Post Check"



The check will print:



Payee: The Best Realty Company
Trust Transfer
Trust Transfer to Customer Deposits

Check Date: 10/08/2004 Check No: 5010 1120 4
Office: North Branch (OFFICE1)

Transfer Amount 1,000.00

Trans No. 9800008 FL-CS
Address: 44 Rover Lane
Sale Price: $ 200,000
Close Date: 10/08/2004
Seller: Aire, Dr. Perry
Buyer: Bega, Rudy

Best Bank and Trust
5879 S 108th Street
Hales Corners, WI 53130

5010

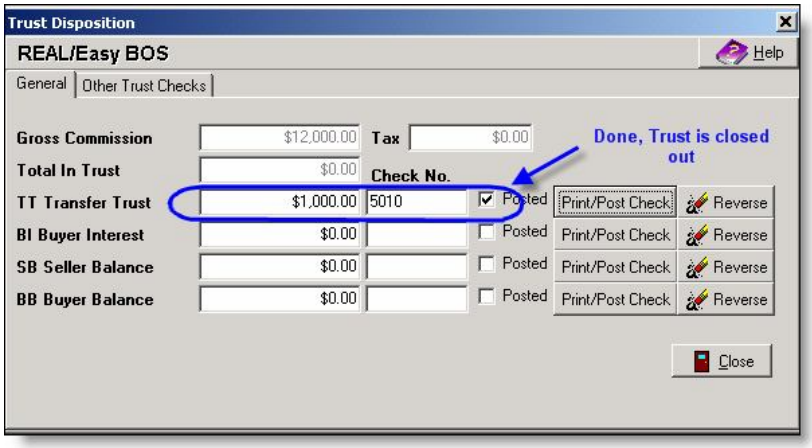
Pay: ONE THOUSAND AND XX/100 **********

Date
10/08/2004

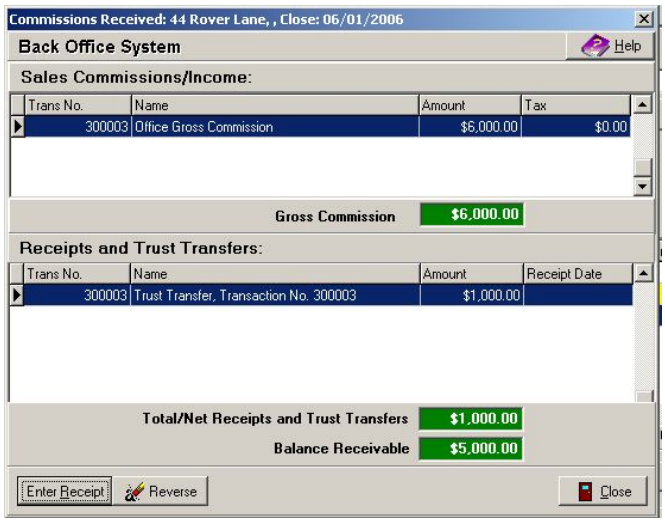
Amount
$1,000.00

The Best Realty Company
5859 S. 108th Street, Unit 200
Hales Corners, WI 53130

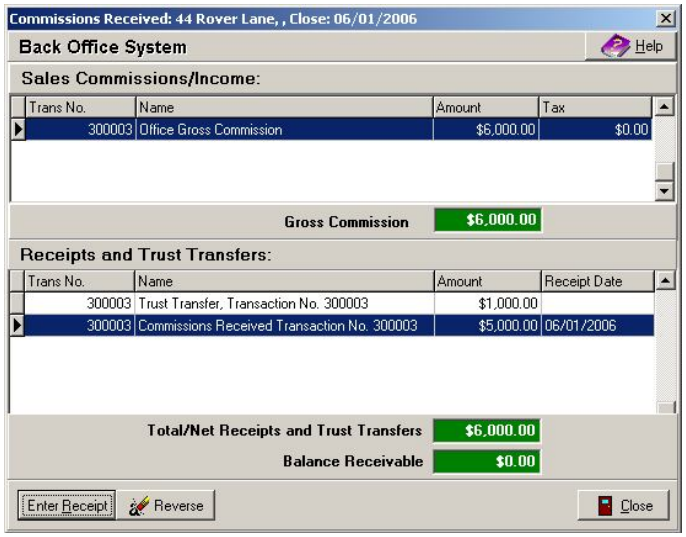
Above – sample trust transfer check.



After printing the check the above "Trust Disposition" screen will be updated to indicate the completed transfer. Close the Trust Disposition window. Move on to closing Step 4.

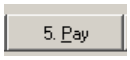


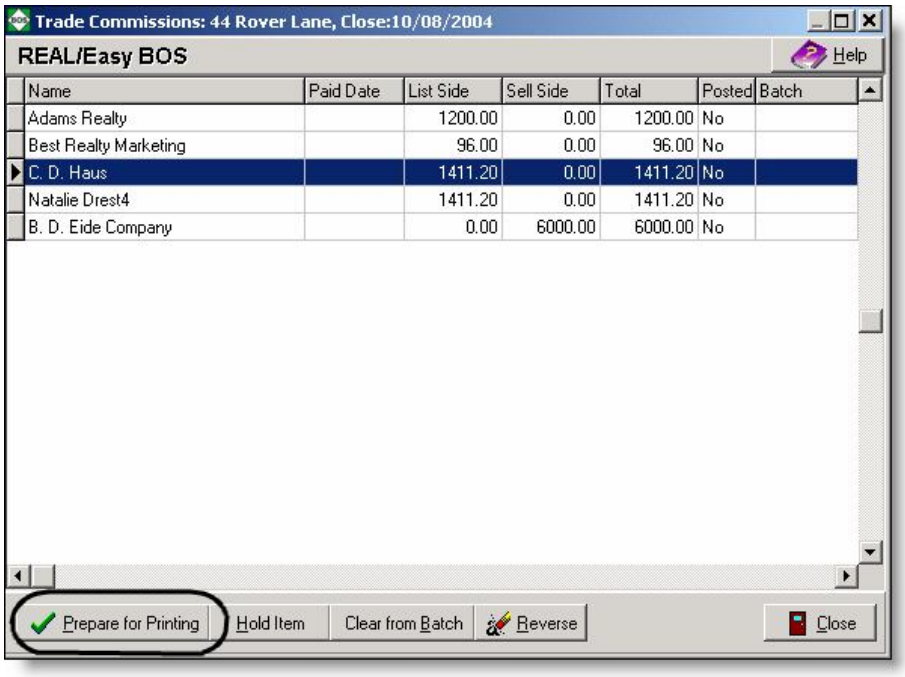
From this window you can record your sales commission receipts. This particular transaction already indicates that $1000 was received from closing the trust account just done with Step 3. So the company should have another $5000 check from closing to record. Click on 



Closing step 4 is completed when the Balance Receivable is zero.

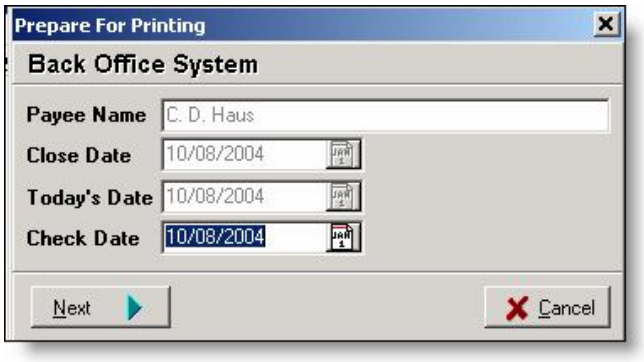
If you are using REAL/Easy to pay the commission fees or record commission payments either for posting or agent commission paid reports, you should do closing step 5.

Click on 

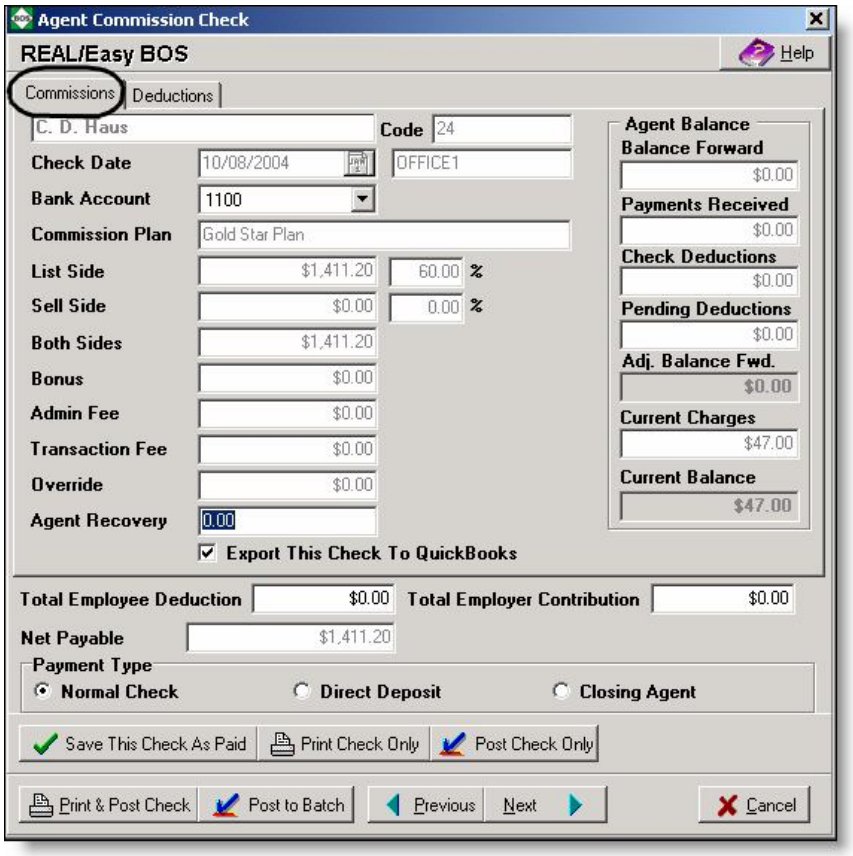


This screen will list all of the potential fees and commissions to pay. For those that are to be paid by check, they are then paid from this screen.

For practice, select agent “C.D. Haus” to pay and click on 



This screen will assign a check date, but you can change this if necessary. Click “**Next**”.

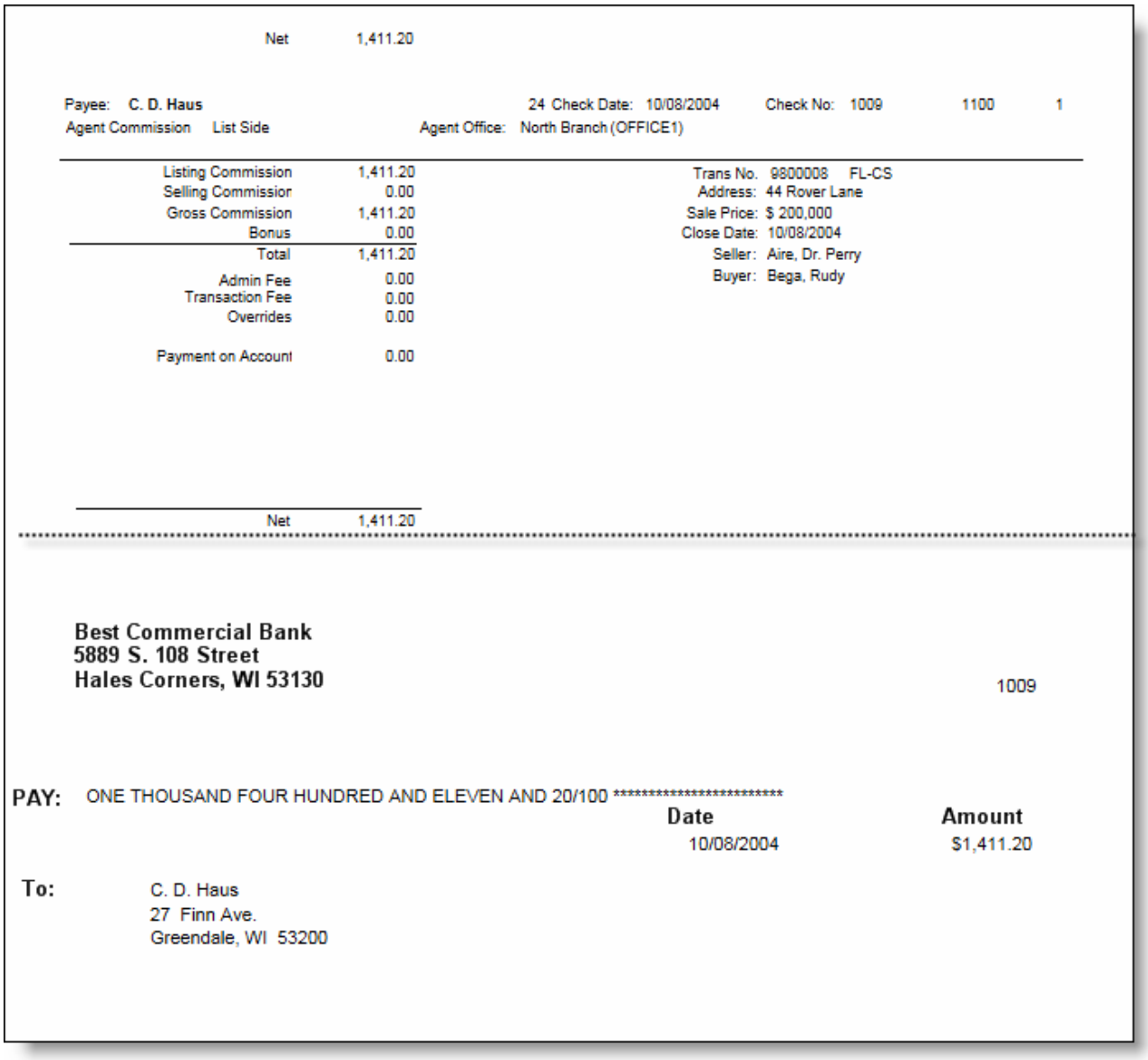


This is the commission check print setup screen. There is a main tab "Commissions" and another for adding other "Deductions". The Commissions screen shows the payee and commission to be paid and out of which bank account.

The screen also shows the status of the agent's account if you are using REAL/Easy's agent billing. If you wish to make an "Agent Recovery" deduction to help pay down the A/R balance, this can be entered on the screen. If more deductions are to be made, click on the deduction screen to add them.

You can "**Print & Post Check**" for immediate printing or "**Post to Batch**" for check batch printing later. For practice here, click "**Print & Post Check**".

This screen will display the next check number to be used. Click "Next".



Net 1,411.20

Payee: C. D. Haus 24 Check Date: 10/08/2004 Check No: 1009 1100 1
Agent Commission List Side Agent Office: North Branch (OFFICE1)

Listing Commission	1,411.20
Selling Commission	0.00
Gross Commission	1,411.20
Bonus	0.00
Total	1,411.20
Admin Fee	0.00
Transaction Fee	0.00
Overrides	0.00
Payment on Account	0.00
Net	1,411.20

Trans No. 9800008 FL-CS
Address: 44 Rover Lane
Sale Price: $ 200,000
Close Date: 10/08/2004
Seller: Aire, Dr. Perry
Buyer: Bega, Rudy

Best Commercial Bank
5889 S. 108 Street
Hales Corners, WI 53130

1009

PAY: ONE THOUSAND FOUR HUNDRED AND ELEVEN AND 20/100 **********

Date 10/08/2004

Amount $1,411.20

To: C. D. Haus
27 Finn Ave.
Greendale, WI 53200

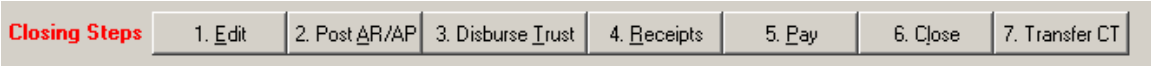
Sample “Bottom” check form above.

Name	Paid Date	List Side	Sell Side	Total	Posted	Batch	Payment Type	Office
Adams Realty		1200.00	0.00	1200.00	No			OFFIC
Best Realty Marketing		96.00	0.00	96.00	No			OFFIC
C. D. Haus	10/08/2004	1411.20	0.00	1411.20	Yes		Normal Check	OFFIC
Natalie Drest4		1411.20	0.00	1411.20	No			OFFIC
B. D. Eide Company		0.00	6000.00	6000.00	No			OFFIC

After printing, the payee line should indicate that the payment has been made – see

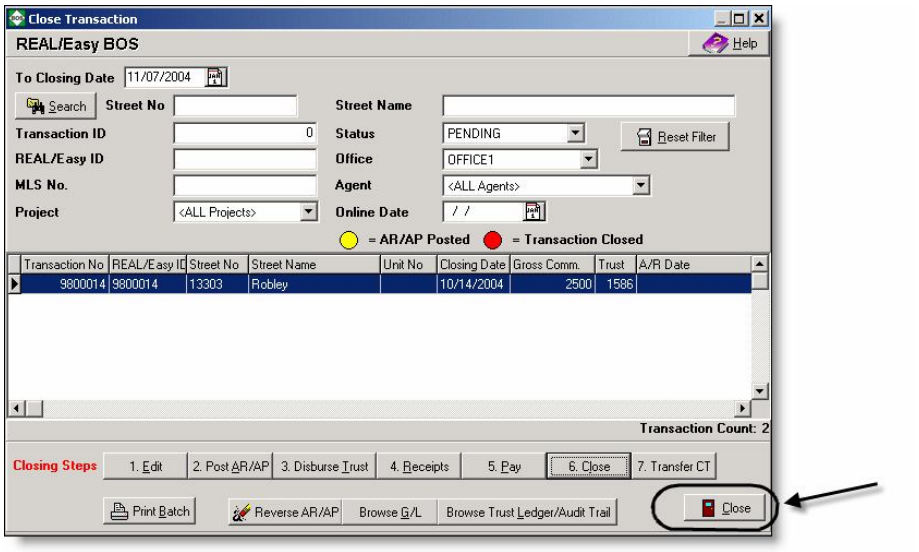
"Posted" and "Payment Type" columns. Also scroll to the right to see the check date and check number columns.

After all commission checks that are to be issued are completed, the final step is to "Close" the transaction:



When you click on  the transaction will Close.

For most companies the closing is complete and the operator will move on to the next closing. In some areas where commissions income is held in a special account and need to be transferred to the company, the last step, #7, is done but will not be shown here.



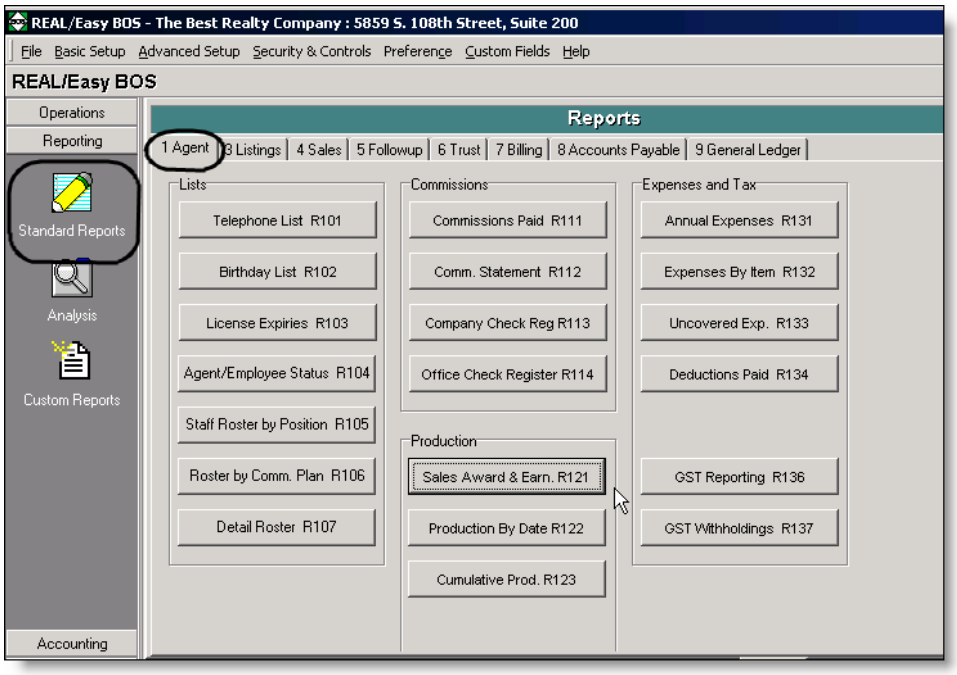
- Click on the close transaction browse "Close" button.

How to Run Reports
Step 1- Report Types

Let's review for a moment. So far you have:

- Learned how to view and update company, office, agent, broker, and contact information from the **BOS Setup** module.
- Learned how to find and view/enter listing information from the **Listings/Sales** module.
- Learned how to find and view/enter sales transaction information from the **Transactions** module.
- And we've learned about the Closing procedures that are available with the "**Close Transaction**" command.

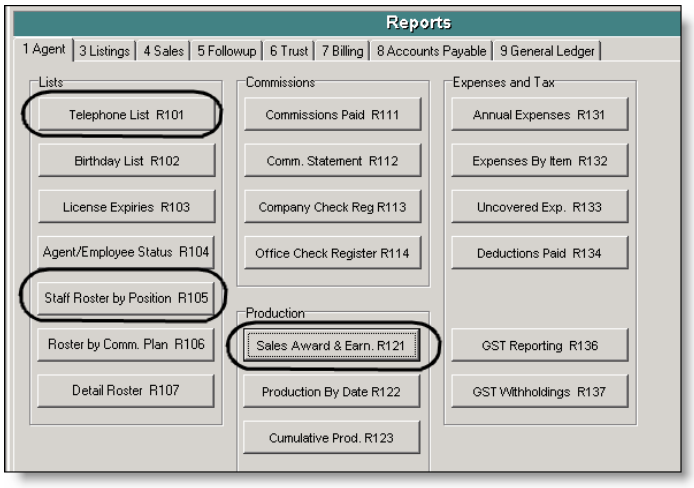
Keeping the data up to date is a lot of work. By maintaining agent, listing, and transaction data in REAL/Easy, all of the work to keep this information current and calculate and process closings is made efficient using the various listing and transaction commands.



Now comes more payoff: seeing how your agents, branches, and company are doing by running reports. Let's get going. Enter the "Reporting" area and click on the "Standard Reports" tool to display the above reporting menu.

Reports are available for 9 areas organized by tabs starting with "1 Agent" We'll take you through a sample agent report now.

Step 2 — Running an Agent



Above, many reports for/regarding agents – Lists, Commissions, Production, Expenses and Tax.

While within the “1 Agent” tab, click on the “Telephone List R101” button.

Click the “Preview” button.

Agent Telephone List

The Best Realty Company

Office: OFFICE1

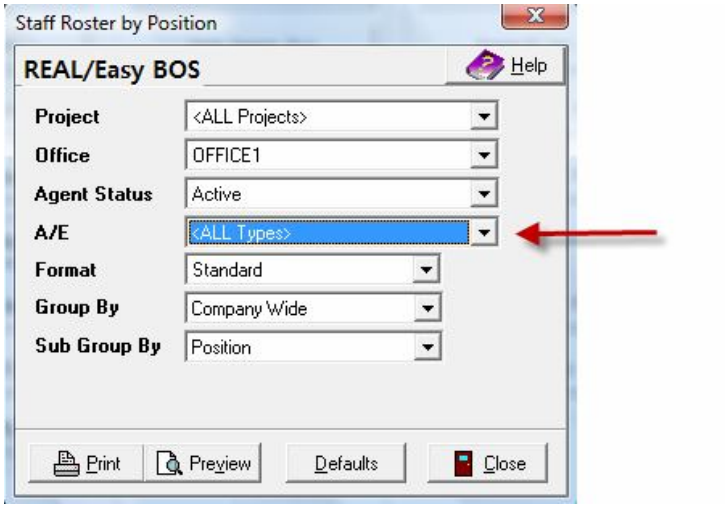
North Branch

Project: <ALL Projects>

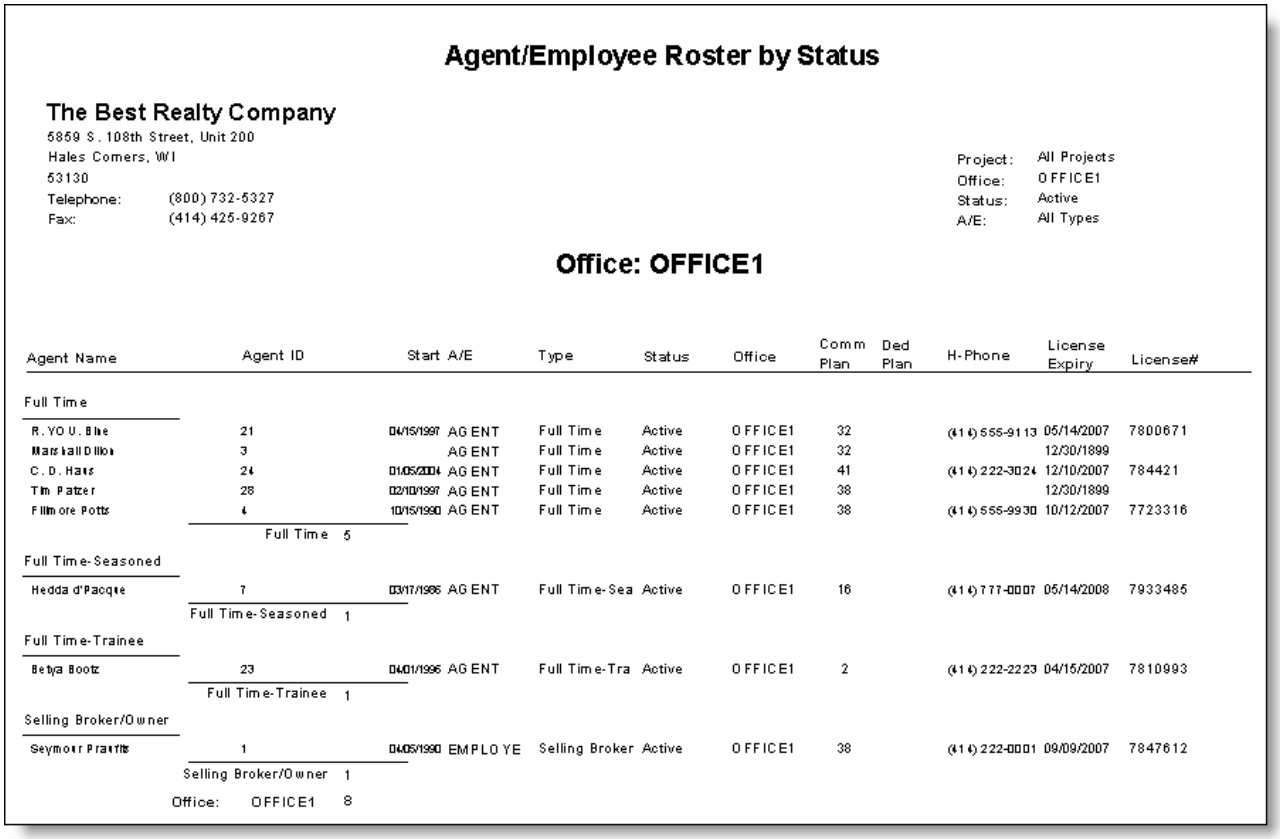
Agent Name	Status	Cell No.	Business No.	Ext.	Fax No.	Email
Bine, R. YOU.	A	(414) 555-9113	(414) 543-5361		(414) 543-5650	rybine@thebestrealty.com
Bootz, Betya	A	(414) 444-4423	(414) 543-5361		(414) 222-2278	bb@thebestrealty.com
Dillon, Marshall	A	-	-		-	m dillion@longbranch.org
d'Pacque, Hedda	A	(414) 444-4407	(414) 543-5361		(414) 777-0008	num ber1@thebestrealty.com
Haus, C. D.	A	-	(414) 543-5361		(414) 222-3024	
Patzer, Tim	A	-	(414) 555-2222		-	
Potts, Fillmore	A	(262) 555-9930	(414) 543-5361		(414) 543-5650	fillm orepotts@yahgle.com
Praufits, Seym our	A	-	(414) 543-5361		(414) 543-5650	$$@office1bestrealty.com

This is a sample of the Agent Telephone List Report showing key phone and email information.

Next try the “Staff Roster by Position R105” report:



Select “<ALL Types>” and click “Preview”



Agent/Employee Roster by Status

The Best Realty Company
5859 S. 108th Street, Unit 200
Hales Corners, WI
53130
Telephone: (800) 732-5327
Fax: (414) 425-9267

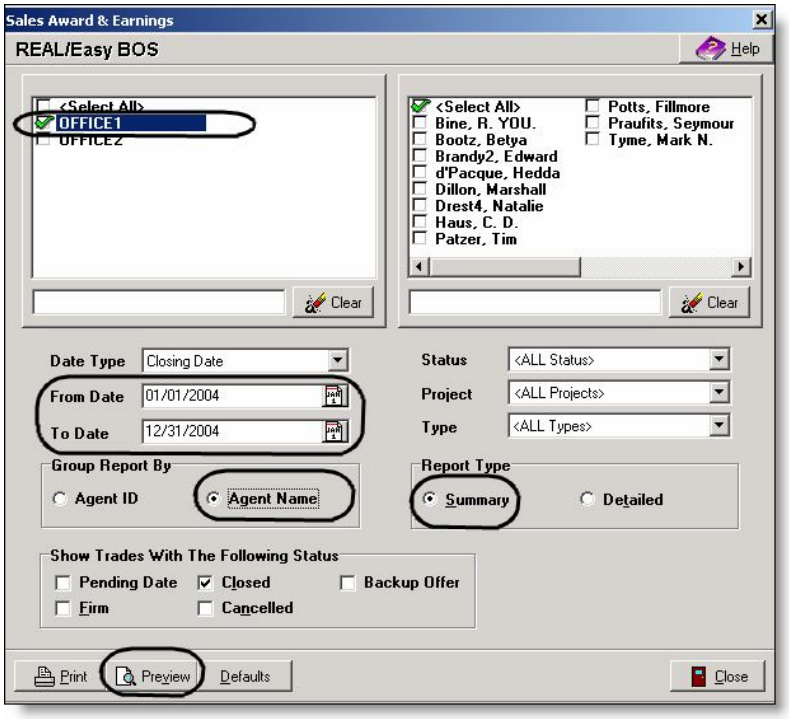
Project: All Projects
Office: OFFICE1
Status: Active
A/E: All Types

Office: OFFICE1

Agent Name	Agent ID	Start	A/E	Type	Status	Office	Comm Plan	Ded Plan	H-Phone	License Expiry	License#
Full Time											
R. YOU. Blue	21	04/15/1997	AGENT	Full Time	Active	OFFICE1	32		(414) 555-9113	05/14/2007	7800671
Marshall Dillon	3		AGENT	Full Time	Active	OFFICE1	32			12/30/1899	
C. D. Hans	24	01/05/2004	AGENT	Full Time	Active	OFFICE1	41		(414) 222-3024	12/10/2007	784421
Tim Patzer	28	02/10/1997	AGENT	Full Time	Active	OFFICE1	38			12/30/1899	
Fillmore Potts	4	10/15/1990	AGENT	Full Time	Active	OFFICE1	38		(414) 555-9930	10/12/2007	7723316
	Full Time 5										
Full Time-Seasoned											
Hedda d'Pacqie	7	03/17/1986	AGENT	Full Time-Sea	Active	OFFICE1	16		(414) 777-0007	05/14/2008	7933485
	Full Time-Seasoned 1										
Full Time-Trainee											
Betya Bootz	23	04/01/1996	AGENT	Full Time-Tra	Active	OFFICE1	2		(414) 222-2223	04/15/2007	7810993
	Full Time-Trainee 1										
Selling Broker/Owner											
Seymour Prantts	1	04/05/1990	EMPLOYE	Selling Broker	Active	OFFICE1	38		(414) 222-0001	09/09/2007	7847612
	Selling Broker/Owner 1										
	Office: OFFICE1 8										

This is a handy report listing all of the office agents and staff by “position”. Start dates, commission plan ID assigned, phone, and license information are included.

A popular report for agents and managers is the “Sales Award and Earn R121” report. Select that one now:



There are hundred’s of ways to run this report – for this example:

- Select OFFICE1
- Enter the from and to dates shown above for this sample data (2004).
- Select “Group Report By” Agent Name.
- Select “Report Type” Summary.

The Best Realty Company
Office Agent Sales Award & Earnings by Agent Name

		AGCI	Franchise (CA3)	Agent Gross	Agent Net	List Units	Sell Units	Total Units	List Side Volume	Sell Side Volume	Total Volume
Branch: North Branch (OFFICE1)											
R. YOU. Bine (21)	04/15/1997	1,200.00	60.00	570.00	570.00	0.50	0.00	0.50	50,000	0	50,000
Betya Bootz (23)	04/01/1996	1,200.00	60.00	684.00	684.00	0.50	0.00	0.50	50,000	0	50,000
Edward Brandy2 (2)	12/01/1991	5,246.50	382.26	5,837.08	5,545.23	1.00	1.00	2.00	149,900	149,900	299,800
Hedda d'Pacque (7)	03/17/1986	15,335.76	636.65	7,869.73	7,869.73	2.00	1.50	3.50	175,000	92,450	267,450
Natalie Drest4 (8)	03/01/2004	3,010.74	84.64	1,716.58	1,716.58	0.50	0.50	1.00	100,000	17,450	117,450
C. D. Haus (24)	01/05/2004	9,120.00	451.20	4,603.20	4,603.20	1.50	1.00	2.50	196,000	96,000	292,000
Seymour Praufits (1)	04/05/1990	10,000.00	600.00	4,700.00	4,700.00	0.00	1.00	1.00	0	100,000	100,000
	Branch: OFFICE1	45,113.00	2,274.75	25,980.59	25,688.74	6.00	5.00	11.00	720,900	455,800	1,176,700

This report tabulates the key agent production “award” figures of AGCI, Units, and Volume while also providing “Agent Gross” earnings. “Agent Net” would be an agent’s net amount after any deductions are taken.

The above is a “Summary” format which helps a branch manager quickly review how his/her agents are doing. Running the same report in detail is a handy report to review and give to the agent.

Run the same report but select Report type “Detailed”:

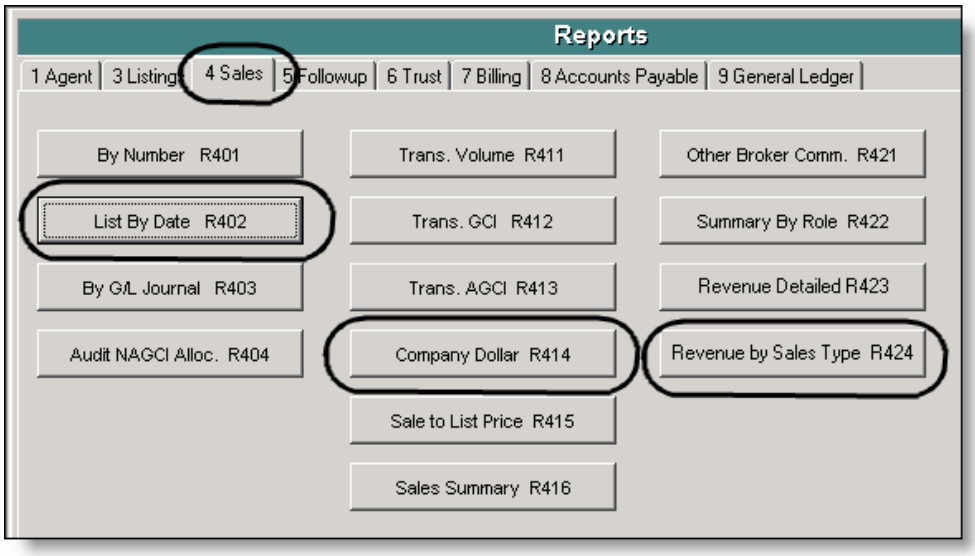
The Best Realty Company
Office Agent Sales Award & Earnings by Agent Name
Hedda d'Pacque

			AGCI	Franchise (CA3)	Agent Gross	Agent Net	List Units	Sell Units	Total Units	List Side Volume	Sell Side Volume	Total Volume
Hedda dPacque (7)		CloseDate										
510 CL-FS Mendota Ave.	Sell Side	10/03/2004	610.76	36.65	305.38	305.38	0.00	0.50	0.50	0	17,460	17,460
2210 North Grant Street FL-FS	Sell Side	10/07/2004	0.00	0.00	291.85	291.85	0.00	0.00	0.00	0	0	0
4306 N. Icier Dr.	List Side	10/11/2004	2,625.00	0.00	1,312.50	1,312.50	1.00	0.00	1.00	75,000	0	75,000
4306 N. Icier Dr.	Sell Side	10/11/2004	2,100.00	0.00	1,260.00	1,260.00	0.00	1.00	1.00	0	75,000	75,000
RR 2, Box 416	List Side	10/13/2004	10,000.00	600.00	4,700.00	4,700.00	1.00	0.00	1.00	100,000	0	100,000
Hedda dPacque (7)		03/17/1986	15,335.76	636.65	7,869.73	7,869.73	2.00	1.50	3.50	175,000	92,460	267,460

The Detailed format will show for the agent the results of each closed transaction.

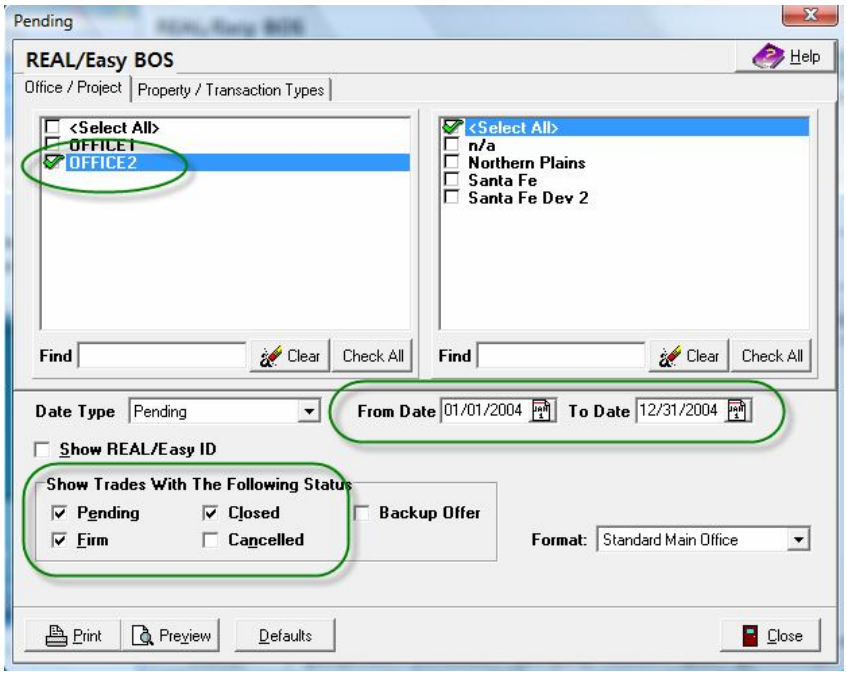
Note that the AGCI is the revenue allocated to the agent in each transaction in the CA4 “Income Allocation” screen – learned a few pages back. Units and Volume and the agents Gross Commission were entered or calculated on the CA4 “Commission Worksheet”.

Step 3—Sales Reporting

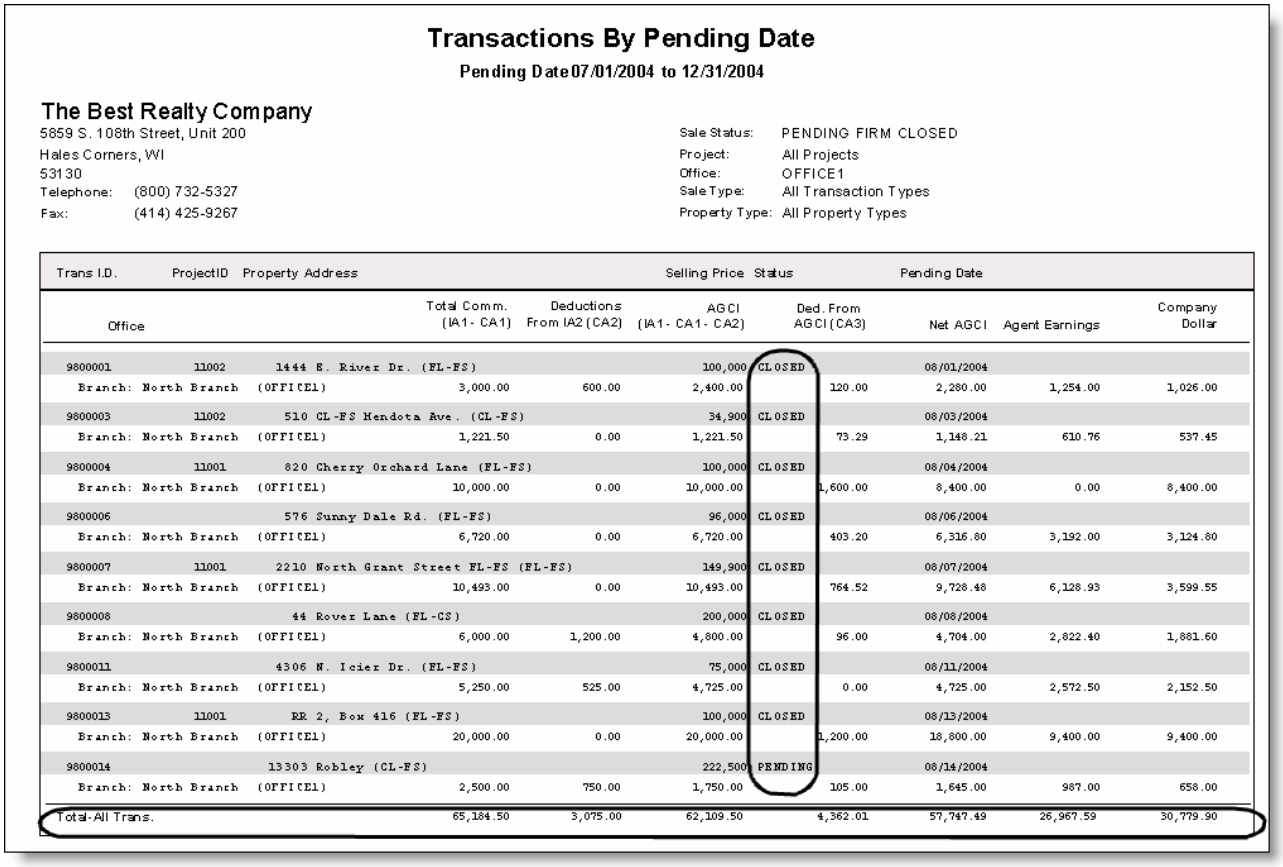


Another popular and valuable set of reports are those within the "4 Sales" area. We are going to take a look at three of them: R402 for a detailed written business status, R414 to see what kind of company dollar we are making, and R424 to stand back and see about our business mix.

- Start the "List By Date R402" report:



This report will detail all of the accepted offers written from January through December for OFFICE 1 only.



Transactions By Pending Date

Pending Date 07/01/2004 to 12/31/2004

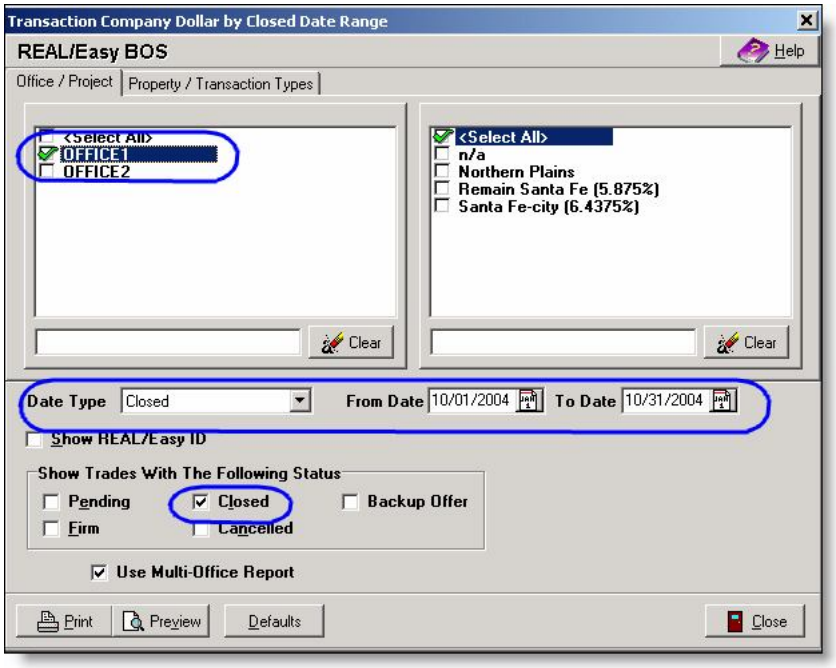
The Best Realty Company
5859 S. 108th Street, Unit 200
Hales Corners, WI
53130
Telephone: (800) 732-5327
Fax: (414) 425-9267

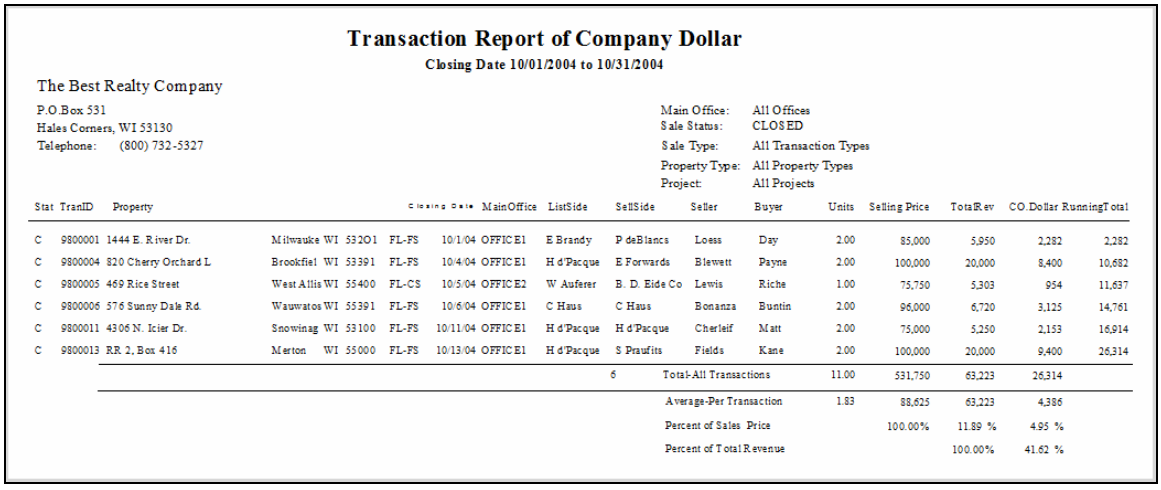
Sale Status: PENDING FIRM CLOSED
Project: All Projects
Office: OFFICE1
Sale Type: All Transaction Types
Property Type: All Property Types

Trans I.D. / Office	ProjectID	Property Address	Total Comm. (IA1 - CA1)	Deductions From IA2 (CA2)	Selling Price / AGCI (IA1 - CA1 - CA2)	Status / Ded. From AGCI (CA3)	Pending Date / Net AGCI	Agent Earnings	Company Dollar
9800001	11002	1444 E. River Dr. (FL-FS)			100,000	CLOSED	08/01/2004		
Branch: North Branch	(OFFICE1)		3,000.00	600.00	2,400.00	120.00	2,280.00	1,254.00	1,026.00
9800003	11002	510 CL-FS Mendota Ave. (CL-FS)			34,900	CLOSED	08/03/2004		
Branch: North Branch	(OFFICE1)		1,221.50	0.00	1,221.50	73.29	1,148.21	610.76	537.45
9800004	11001	820 Cherry Orchard Lane (FL-FS)			100,000	CLOSED	08/04/2004		
Branch: North Branch	(OFFICE1)		10,000.00	0.00	10,000.00	1,600.00	8,400.00	0.00	8,400.00
9800006		576 Sunny Dale Rd. (FL-FS)			96,000	CLOSED	08/06/2004		
Branch: North Branch	(OFFICE1)		6,720.00	0.00	6,720.00	403.20	6,316.80	3,192.00	3,124.80
9800007	11001	2210 North Grant Street FL-FS (FL-FS)			149,900	CLOSED	08/07/2004		
Branch: North Branch	(OFFICE1)		10,493.00	0.00	10,493.00	764.52	9,728.48	6,128.93	3,599.55
9800008		44 Rover Lane (FL-CS)			200,000	CLOSED	08/08/2004		
Branch: North Branch	(OFFICE1)		6,000.00	1,200.00	4,800.00	96.00	4,704.00	2,822.40	1,881.60
9800011		4306 N. Icier Dr. (FL-FS)			75,000	CLOSED	08/11/2004		
Branch: North Branch	(OFFICE1)		5,250.00	525.00	4,725.00	0.00	4,725.00	2,572.50	2,152.50
9800013	11001	RR 2, Box 416 (FL-FS)			100,000	CLOSED	08/13/2004		
Branch: North Branch	(OFFICE1)		20,000.00	0.00	20,000.00	1,200.00	18,800.00	9,400.00	9,400.00
9800014		13303 Robley (CL-FS)			222,500	PENDING	08/14/2004		
Branch: North Branch	(OFFICE1)		2,500.00	750.00	1,750.00	105.00	1,645.00	987.00	658.00
Total-All Trans.			65,184.50	3,075.00	62,109.50	4,362.01	57,747.49	26,967.59	30,779.90

The report shows each written sale along with key revenue, commission, and company dollar information. Shown also is the status where the manager can see one sale has yet to close. Totals are included at the bottom of the report.

- Start the “Company Dollar R414” report:





Transaction Report of Company Dollar

Closing Date 10/01/2004 to 10/31/2004

The Best Realty Company

P.O.Box 531
Hales Corners, WI 53130
Telephone: (800) 732-5327

Main Office: All Offices
Sale Status: CLOSED
Sale Type: All Transaction Types
Property Type: All Property Types
Project: All Projects

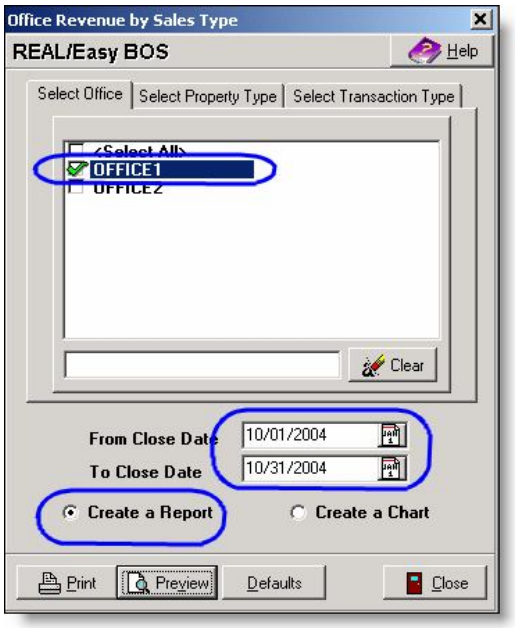
Stat	TranID	Property					Closing Date	MainOffice	ListSide	SellSide	Seller	Buyer	Units	Selling Price	TotalRev	CO.Dollar	RunningTotal
C	9800001	1444 E. River Dr.	Milwauke	WI	53201	FL-FS	10/1/04	OFFICE1	E Brandy	P deBlancs	Loess	Day	2.00	85,000	5,950	2,282	2,282
C	9800004	820 Cherry Orchard L	Brookfiel	WI	53391	FL-FS	10/4/04	OFFICE1	H d'Pacque	E Forwards	Blewett	Payne	2.00	100,000	20,000	8,400	10,682
C	9800005	469 Rice Street	West Allis	WI	55400	FL-CS	10/5/04	OFFICE2	W Auferer	B. D. Eide Co	Lewis	Riche	1.00	75,750	5,303	954	11,637
C	9800006	576 Sunny Dale Rd.	Wauwatos	WI	55391	FL-FS	10/6/04	OFFICE1	C Haus	C Haus	Bonanza	Buntin	2.00	96,000	6,720	3,125	14,761
C	9800011	4306 N. Icier Dr.	Snowinag	WI	53100	FL-FS	10/11/04	OFFICE1	H d'Pacque	H d'Pacque	Cherleif	Matt	2.00	75,000	5,250	2,153	16,914
C	9800013	RR 2, Box 416	Merton	WI	55000	FL-FS	10/13/04	OFFICE1	H d'Pacque	S Praufits	Fields	Kane	2.00	100,000	20,000	9,400	26,314
										6	Total-All Transactions		11.00	531,750	63,223	26,314	
											Average-Per Transaction		1.83	88,625	63,223	4,386	
											Percent of Sales Price			100.00%	11.89 %	4.95 %	
											Percent of Total Revenue				100.00%	41.62 %	

This report then details the closed company dollar generated by each sale for the month.

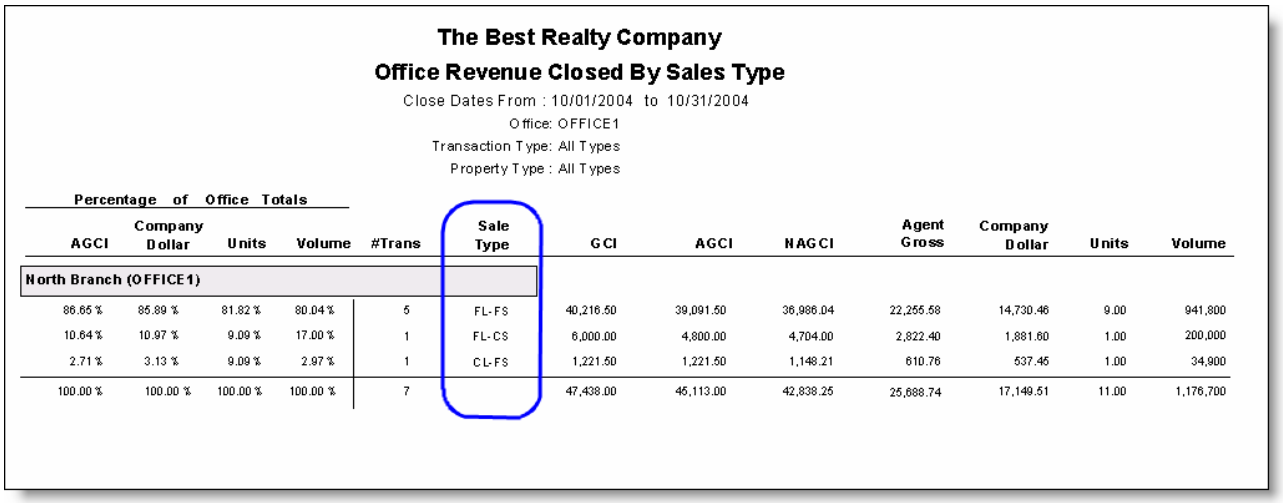
Also included foe each property is the sale type (Fl-FS is Firm-List and Firm-Sale = Inhouse both sides, CL-FS where we sold a cobroke listing, and Fl-CS where a cobroke sold our listing), closing date, listing and selling prices, and the closing date.

Let's learn where our revenue is coming from using R424. We want to know how much revenue we are generating in-house vs. that generated by us selling cobroke listings or cobrokers selling our listings.

- Start the "Revenue by Sale Type R424" report:



Select the month of October , 2004 and OFFICE1 only.



The Best Realty Company

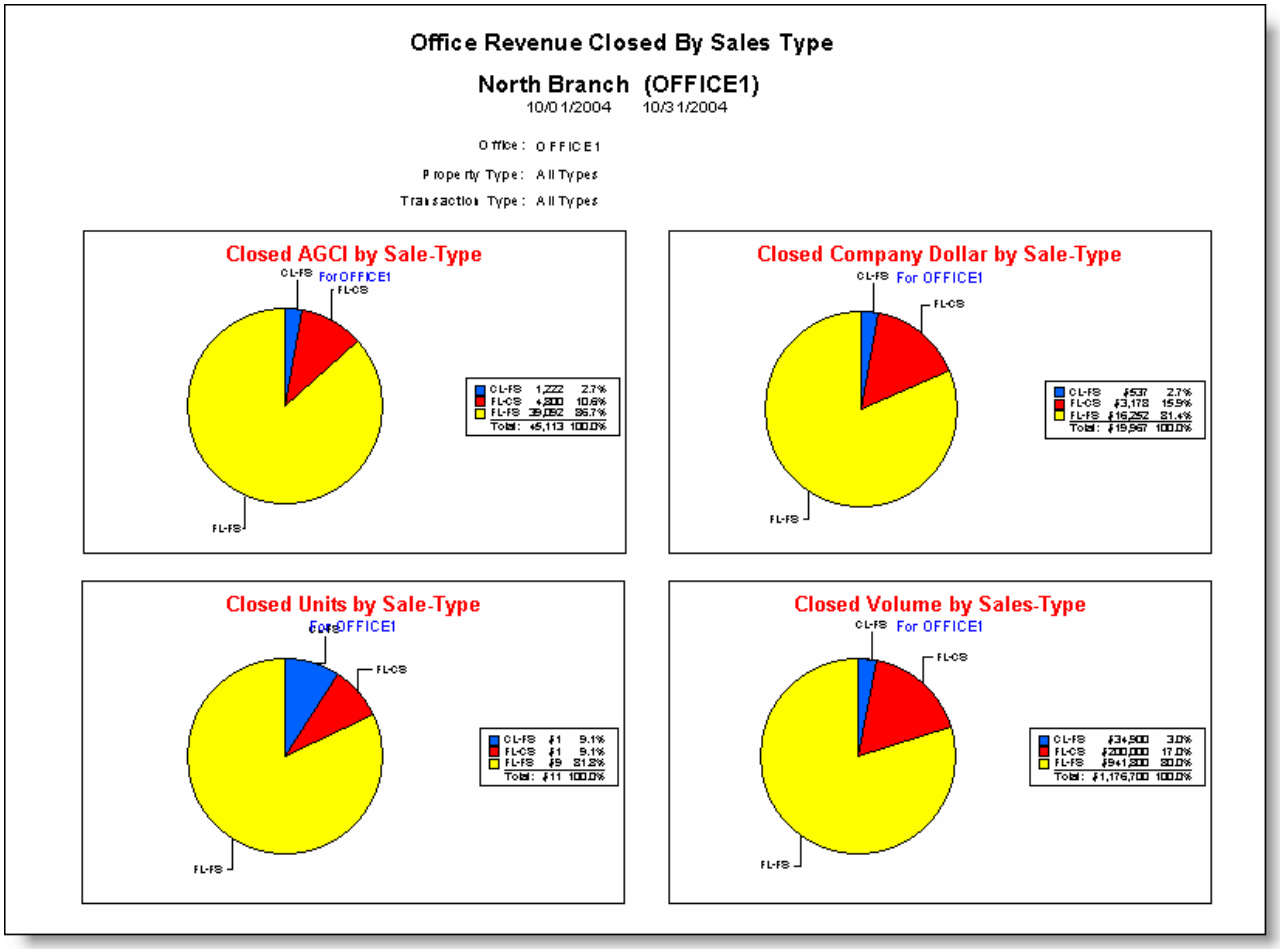
Office Revenue Closed By Sales Type

Close Dates From : 10/01/2004 to 10/31/2004
Office: OFFICE1
Transaction Type: All Types
Property Type : All Types

Percentage of Office Totals												
AGCI	Company Dollar	Units	Volume	#Trans	Sale Type	GCI	AGCI	NAGCI	Agent Gross	Company Dollar	Units	Volume
North Branch (OFFICE1)												
86.65 %	85.89 %	81.82 %	80.04 %	5	FL-FS	40,216.50	39,091.50	36,986.04	22,255.58	14,730.46	9.00	941,800
10.64 %	10.97 %	9.09 %	17.00 %	1	FL-CS	6,000.00	4,800.00	4,704.00	2,822.40	1,881.60	1.00	200,000
2.71 %	3.13 %	9.09 %	2.97 %	1	CL-FS	1,221.50	1,221.50	1,148.21	610.76	537.45	1.00	34,900
100.00 %	100.00 %	100.00 %	100.00 %	7		47,438.00	45,113.00	42,838.25	25,688.74	17,149.51	11.00	1,176,700

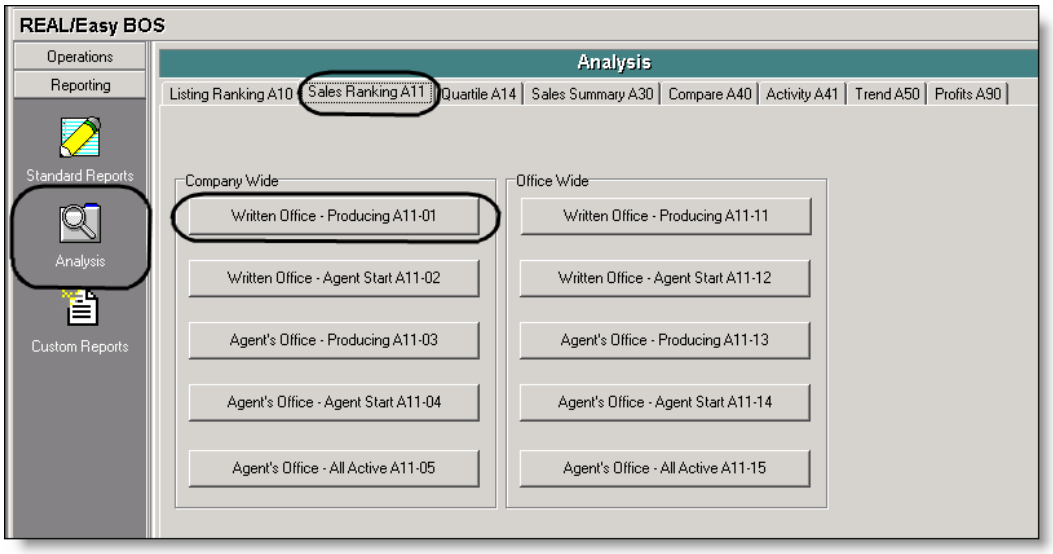
The report shows that most of the October closings were from in-house sales – 86%. Next was about 11% for the FL-CS sale(s).

You can view the same figures with charts:



The four key totals of AGCI, Company Dollar, Units and Volume are charted by sale type – i.e. the “business mix”.

Step 4—Transaction Volume Ranking and Quartiling

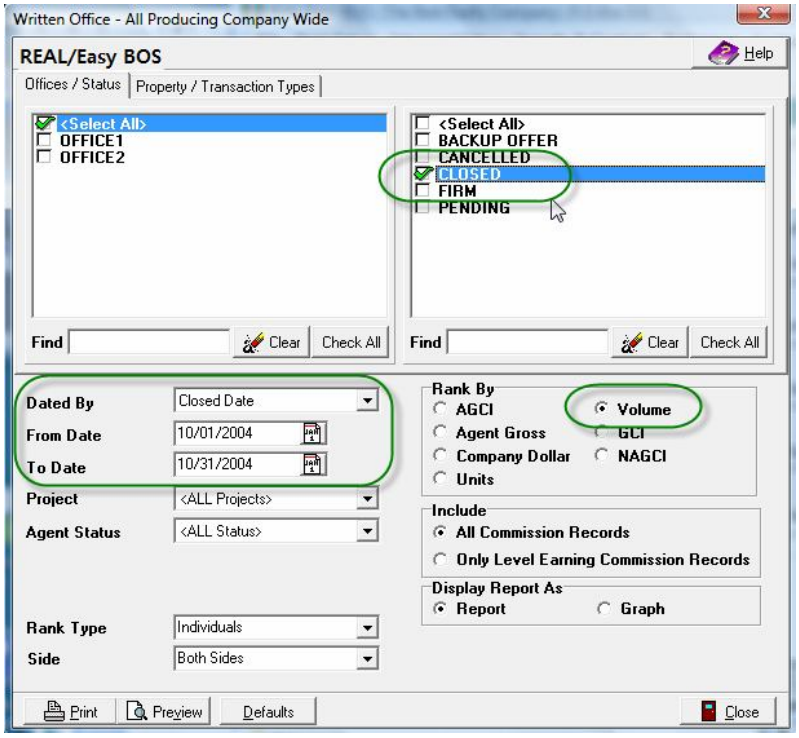


Let's move over to another reporting area called "Analysis". These reports help you gain more value from your database by analyzing your business and agent production and potential in a number of different ways.

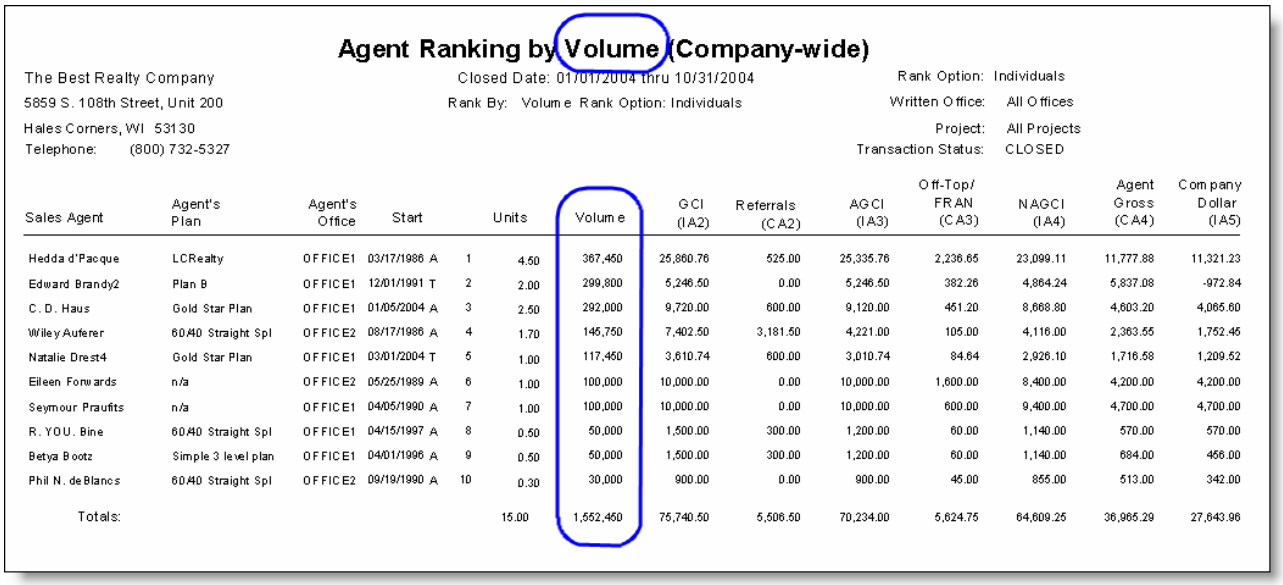
Used most often are the "Sales Ranking A11" reports. These can show total revenue, expense, company dollar, and sides and volume production generated for your whole company by each agent.

Let's take a look at a closed volume ranking:

- Click on the **Analysis** reporting module.
- Click on the "**Sales Ranking A11**" tab.
- Click on Written Office Producing A11-01



To run a “closed” ranking, select only the status “CLOSED” (check box). Then select the ”Dated by” of “Closed Date” and enter the October 2004 month. Next, indicate to Rank By “Volume” and then click “Preview”.



Agent Ranking by Volume (Company-wide)

The Best Realty Company
5859 S. 108th Street, Unit 200
Hales Corners, WI 53130
Telephone: (800) 732-5327

Closed Date: 01/01/2004 thru 10/31/2004
Rank By: Volume Rank Option: Individuals

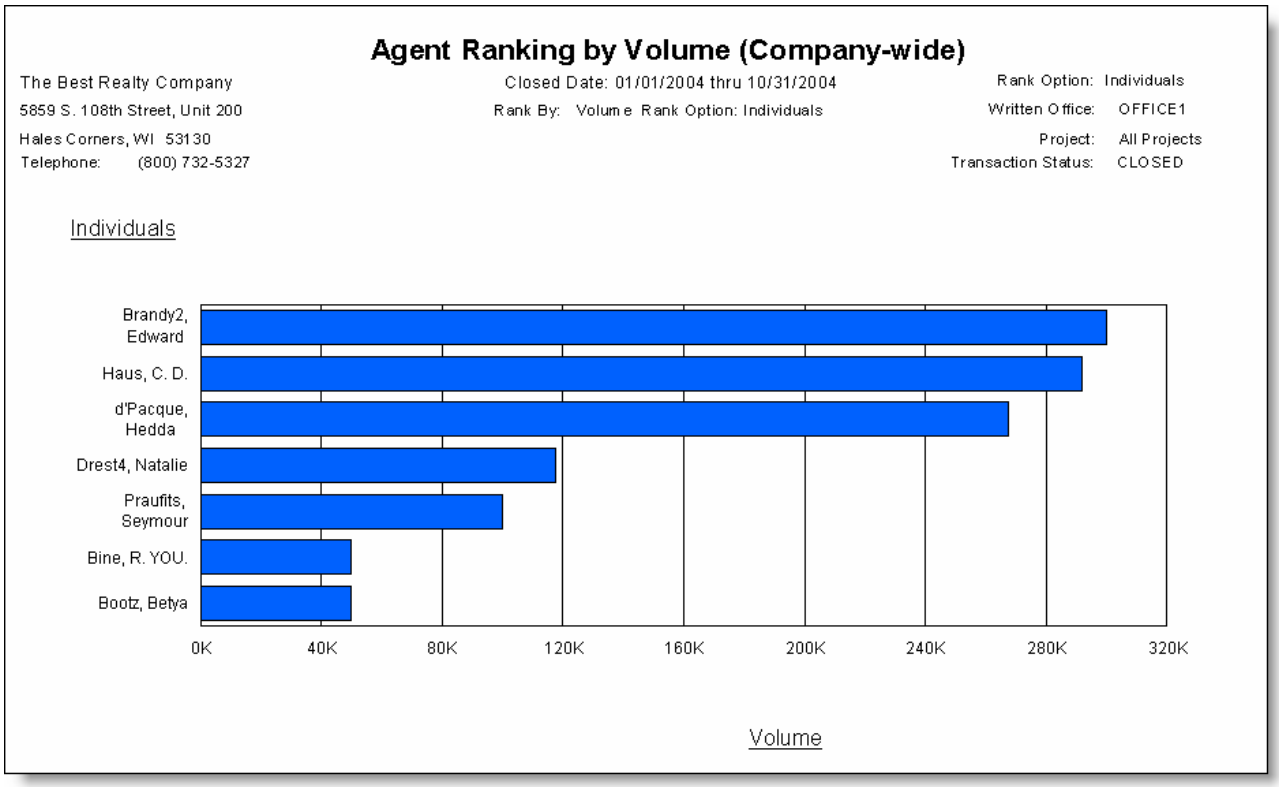
Rank Option: Individuals
Written Office: All Offices
Project: All Projects
Transaction Status: CLOSED

Sales Agent	Agent's Plan	Agent's Office	Start		Units	Volume	GCI (IA2)	Referrals (CA2)	AGCI (IA3)	Off-Top/ FRAN (CA3)	NAGCI (IA4)	Agent Gross (CA4)	Company Dollar (IA5)
Hedda d'Pacque	LCRealty	OFFICE1	03/17/1986	A	4.50	367,450	25,860.76	525.00	25,335.76	2,236.65	23,099.11	11,777.88	11,321.23
Edward Brandy2	Plan B	OFFICE1	12/01/1991	T	2.00	299,800	5,246.50	0.00	5,246.50	382.26	4,864.24	5,837.08	-972.84
C. D. Haus	Gold Star Plan	OFFICE1	01/05/2004	A	3.00	292,000	9,720.00	600.00	9,120.00	451.20	8,668.80	4,603.20	4,065.60
Wiley Auferer	60/40 Straight Spl	OFFICE2	08/17/1986	A	4.00	145,750	7,402.50	3,181.50	4,221.00	105.00	4,116.00	2,363.55	1,752.45
Natalie Drest4	Gold Star Plan	OFFICE1	03/01/2004	T	5.00	117,450	3,610.74	600.00	3,010.74	84.64	2,926.10	1,716.58	1,209.52
Eileen Forwards	n/a	OFFICE2	05/25/1989	A	6.00	100,000	10,000.00	0.00	10,000.00	1,600.00	8,400.00	4,200.00	4,200.00
Seymour Praufits	n/a	OFFICE1	04/05/1990	A	7.00	100,000	10,000.00	0.00	10,000.00	600.00	9,400.00	4,700.00	4,700.00
R. YOU. Bine	60/40 Straight Spl	OFFICE1	04/15/1997	A	8.00	50,000	1,500.00	300.00	1,200.00	60.00	1,140.00	570.00	570.00
Betya Bootz	Simple 3 level plan	OFFICE1	04/01/1996	A	9.00	50,000	1,500.00	300.00	1,200.00	60.00	1,140.00	684.00	456.00
Phil N. deBlancs	60/40 Straight Spl	OFFICE2	09/19/1990	A	10.00	30,000	900.00	0.00	900.00	45.00	855.00	513.00	342.00
Totals:					15.00	1,552,450	75,740.50	5,506.50	70,234.00	5,624.75	64,609.25	36,965.29	27,643.96

The sales ranking reports will total and rank the selected figure – e.g. closed volume. Other key revenue and production figures are totaled also.

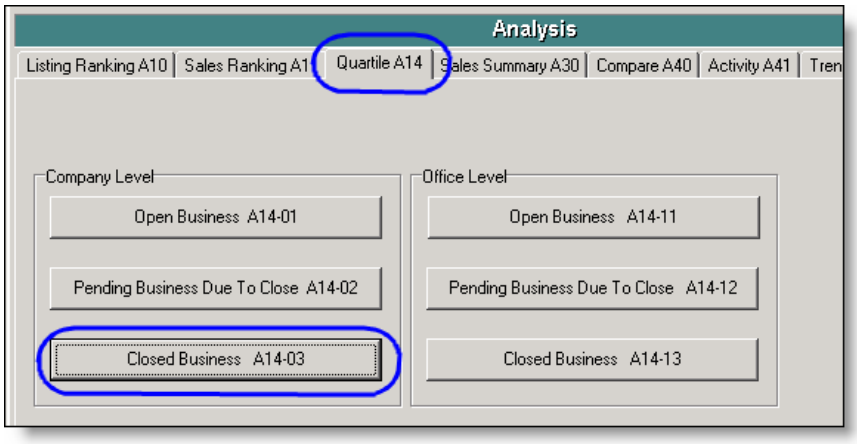
Note that you can rank most any of the above figures for closed, or written, or pending-due-to close business (pipelines). The way you could **rank potential closings** for example is to select only **status “PENDING”** sales for a **future closed date range**.

Occasionally for a sales meeting graph might be printed. Click the “Display Report As:” “Graph”:

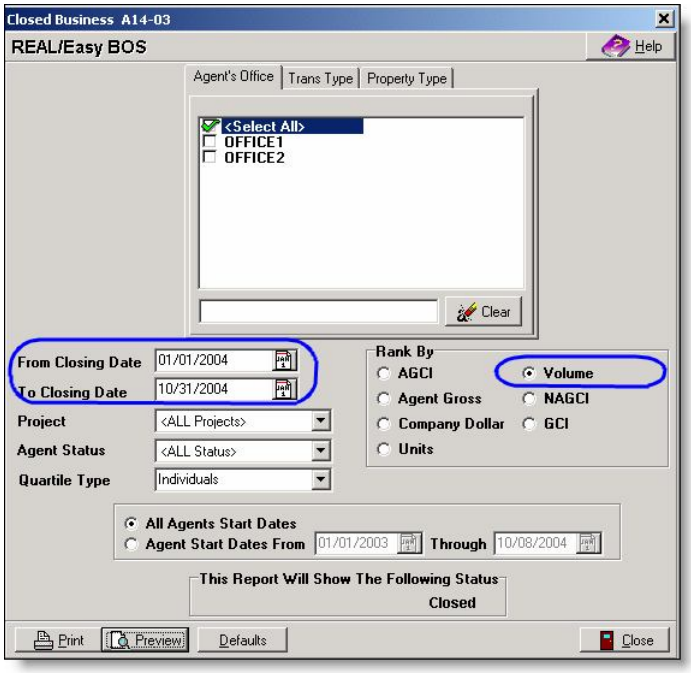


Another way to **compare agent production** is using "***Quartiling***". With this analysis, a selected agent production measurement is totaled and the agents are divided into four "quartiles" or groups with those 25% of the agents placed in the first quartile and the 25% of the agents with the least in the fourth quartile. Those in-between are placed in quartiles 2 and 3.

This is useful for quickly viewing how much you might be depending on your top producers. Or how many low producers you might have compared to medium and high producers.



Move to the Analysis "Quartile A14" tab and select "Closed Business A14-03":



Setup the Closed report for the month of October, 2004 for "Volume".

The Best Realty Company

CompanyWide Quartile Closed Business by Volume A14-03

Individuals Closed 01/01/2004 thru 10/31/2004

AgentStatus:<ALL Status>

Agents	Agent's Office	Status	Start Date		Units	Rank and Quartile	Agent's Total Volume	Agent's Percent of Total Volume	Volume Running Total	Volume Running Total Percent	Percent of Agent's
						---- Quartile 1 : ----------					
d'Pacque, Hedda (7)	OFFICE1	Active	03/17/1986	Full Time-Seas	4.50	1 of 15 Q: 1	367,450	25.3%	367,450	25.3%	6.7%
Brandy2, Edward (2)	OFFICE1	Terminated	12/01/1991	Full Time	2.00	2 of 15 Q: 1	299,800	20.6%	667,250	45.9%	13.3%
Haus, C. D. (24)	OFFICE1	Active	01/05/2004	Full Time	2.50	3 of 15 Q: 1	292,000	20.1%	959,250	66.0%	20.0%
Auferer, Wiley (26)	OFFICE2	Active	08/17/1986	Full Time	1.70	4 of 15 Q: 1	145,750	10.0%	1,105,000	76.1%	26.7%
						---- Quartile 2 : ----------					
Drest4, Natalie (8)	OFFICE1	Terminated	03/01/2004	Full Time	1.00	5 of 15 Q: 2	117,450	8.1%	1,222,450	84.2%	33.3%
Forwards, Eileen (22)	OFFICE2	Active	05/25/1989	Full Time	1.00	6 of 15 Q: 2	100,000	6.9%	1,322,450	91.0%	40.0%
Bine, R. YOU. (21)	OFFICE1	Active	04/15/1997	Full Time	0.50	7 of 15 Q: 2	50,000	3.4%	1,372,450	94.5%	46.7%
Bootz, Betya (23)	OFFICE1	Active	04/01/1996	Full Time-Trair	0.50	8 of 15 Q: 2	50,000	3.4%	1,422,450	97.9%	53.3%
						---- Quartile 3 : ----------					
deBlancs, Phil N. (6)	OFFICE2	Active	09/19/1990	Full Time	0.30	9 of 15 Q: 3	30,000	2.1%	1,452,450	100.0%	60.0%
Dillon, Marshall (3)	OFFICE1	Active		Full Time	0.00	10 of 15 Q: 3	0	0.0%	1,452,450	100.0%	66.7%
Needham, Willie (27)	OFFICE2	Active	02/01/1999	Full Time	0.00	11 of 15 Q: 3	0	0.0%	1,452,450	100.0%	73.3%
Patzer, Tim (28)	OFFICE1	Active	02/10/1997	Full Time	0.00	12 of 15 Q: 3	0	0.0%	1,452,450	100.0%	80.0%
						---- Quartile 4 : ----------					
Potts, Fillmore (4)	OFFICE1	Active	10/15/1990	Full Time	0.00	13 of 15 Q: 4	0	0.0%	1,452,450	100.0%	86.7%
Theis, N. (11)	OFFICE2	Active	06/07/1986	Full Time	0.00	14 of 15 Q: 4	0	0.0%	1,452,450	100.0%	93.3%
Tyme, Mark N. (5)	OFFICE1	Terminated	11/11/1991	Part Time	0.00	15 of 15 Q: 4	0	0.0%	1,452,450	100.0%	100.0%
Totals: 15					14.00		1,452,450				

Above, the report shows the same data as in the A11 ranking, but with a different "analysis". Here, for example, one can see that the top 25% of the agents, those in quartile 1, had generated over 75% if of the closed volume in the month.

We also see in our example that almost 25 percent of the agents had no volume for the month.

Where Do We Go From Here

Congratulations!

You have now completed the **Learning Tour of REAL/Easy BOS**. Items we covered with you include:

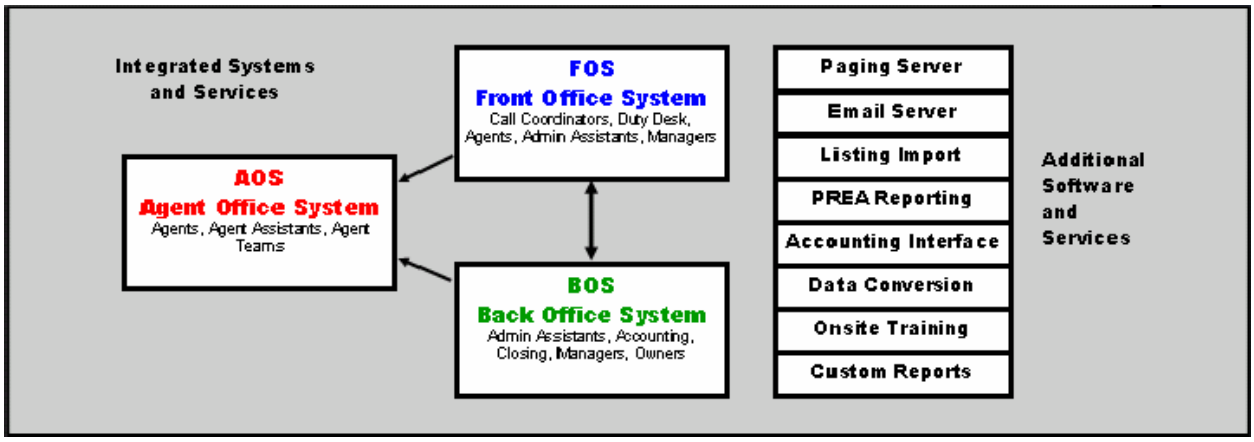
· Viewing and maintaining agent information.
· Viewing sales overall and detailed commission information.
· Printing agent production reports so that we can see how Best Realty is doing.
· Printing detailed sales information to learn how we did on each sale.
· Printing a detailed earnings and awards from each sale for an agent.

Now you are ready to start entering information into your system. There are two ways to learn. You can call the REAL/Easy helpline and walk through the basic steps. Or, you can also follow the steps in the **"Basic Training Course"**, another publication from REAL/Easy.

NOTES

Want Everyone in Your Company to Run It Like a Business?

Run Management Software from REAL/Easy



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