


Add Commission Notes for an Agent

SUMMARY

Commission Notes are a great way to keep track of details that are pertinent to an agent's commission plan.

Access and Edit Commission Notes

- 1 Click your name in the upper right corner then "Admin / Settings".
- 2 Click "Manage Users" from the left menu.
- 3 Select an agent to enter commission notes for.
- 4 On the user's profile, scroll down to the "Commission Notes" field. In this field you can input any details that are pertinent to an agent's commission plan. Some examples of using commission notes are to track complex commission splits for agents, charitable contributions, recurring fees, complex splits, moving from one split to another at a specific company dollar or benchmark, or if you want to know when an agent caps.
- 5 Click [Update User] to save.

 When managing commissions for a transaction that that agent is a part of, commission notes entered will be visible to the right.