

Monthly Transaction
Independent Region
Upload Requirements



Monthly Stats Template

**Emailed to each IR/Global Region main contact on the first of every month.
Global Regions: Complete in your LOCAL currency.**

1 Report includes the following prepopulated Columns:

- Office ID#*
- Office Legacy ID#
- Office Name
- Associate ID#**
- Associate Legacy ID#
- Associate Name
- Statistics Date
- Statistics Type
- Statistics Scope
- Currency
- Active Flag
- Team ID#
- Team Name

* Includes all Open and To Close Offices

** All Active and Inactive Affiliates during the current year

2 Report includes the following columns that the regions will complete:

- Commission amount
- Listing
- Listing amount
- Sale
- Sales amount

3 Each affiliate will have at least two rows for reporting residential and commercial transactions for each office and team they have been affiliated with during the current year.



Template Fields

Column Title	Example	Definition	Comments
Office ID #	100456712	New Office ID number up to nine digits for all OPEN and TOCLOSE Offices affiliated with your region	Prepopulated field
Office Legacy ID #	R0190111	Old Office ID number up to eight digits for all OPEN and TOCLOSE Offices affiliated with your region	Prepopulated field
Office Name	REMAX Beach	Office Name starting with REMAX for all OPEN and TOCLOSE Offices affiliated with your region	Prepopulated field
Associate ID #	100436781	New Associate ID number up to nine digits for all affiliates with the Title Code: Associate, manager, owner and licensed Administrator	Prepopulated field
Associate Legacy ID #	80008765	Old Associate ID number up to eight digits for all affiliates with the Title Code: Associate, manager, owner and licensed administrator; not all affiliates will have an old Legacy ID Number	Prepopulated field
Associate Name	Lopez, Ruby	Last Name, First Name, Middle	Prepopulated field
Statistics Date	4/20/2017	MM/DD/YYYY; Month/Day/Year; Last day of the month	Prepopulated field
Statistics Type	Residential	RES or COMM; one row for each Statistics Type of residential or commercial for each affiliate	Prepopulated field
Statistics Scope	YTD (Year-to-Date)	YTD (Year-to-Date)	Prepopulated field
Currency	USD	Currency rate	Prepopulated field
Active Flag	ACTIVE	Associate status	Prepopulated field
Commission Amount	2340.67	Number up to two decimals; report total Gross Commissions Earned	Please report the affiliate's current YTD commissions
Listing	7.5	Number up to two decimals; number of all closings for the month where one of your affiliates was the listing agent	Please report the affiliate's current YTD listing transactions
Listing Amount	450000	Number up to two decimals; dollar volume of all closings for the month where one of your affiliates was the listing agent	Please report the affiliate's current YTD listing volume
Sale	2	Number up to two decimals: number of all closings for the month where one of your affiliates was the selling agent	Please report the affiliate's current YTD sale transactions
Sale Amount	750000	Total price up to two decimals; dollar volume of all closings for the month where one of your affiliates was the selling agent	Please report the affiliate's current YTD selling volume
Team ID #	101956665	New Team ID number up to nine digits for all teams; please reference the Team Guidelines for further explanation regarding team status	Prepopulated field for all affiliates who are on a team
Team Name	The Smith Team	Name of the team	Prepopulated field for all affiliates who are on a team



Region Responsibilities

Global Regions: Complete in your LOCAL currency.

1 Enter YTD affiliate data for the following fields:

- Commission Amount
- Listing
- Listing Amount
- Sale
- Sales Amount

2 Items to consider prior to entry:

Transferring Offices

- YTD totals must equal the affiliate's total earned commissions through the Statistics Date in that office and team (if applicable).
- If an affiliate is linked to more than one OFFICE throughout the year, a YTD total is needed for each office the affiliate is linked:

FOR EXAMPLE:

John Smith is in Office A from January – March and his YTD commissions = \$50,000.

- Report \$50,000 in Office A January through March for John Smith.

John Smith is in Office B from April – December and his YTD commissions = \$200,000.

- Report John Smith's new YTD total starting with April in Office B and add a separate row for John's YTD total in Office A of \$50,000.

Team Scenarios

- If an affiliate is linked to more than one TEAM throughout the year, a YTD total is needed for each team the affiliate is linked to:

FOR EXAMPLE:

John Smith is on Team John Smith from January – March and his YTD commissions = \$70,000.

- Report \$70,000 in Team John January through March.

John Smith is on Team Awesome from April – December and his YTD commissions = \$2250,000.

- Report John Smith's new team YTD total starting with April on Team Awesome and add a separate row for John's YTD total in Team John Smith of \$70,000.



Region Responsibilities (cont.)

- If an affiliate works for the same office and switches from TEAM status (leader or member) to an individual, a new YTD total is needed for the affiliate's current team status.

FOR EXAMPLE:

Robert Jones is on Team Veronica from January – March and his YTD commissions = \$70,000.

- Report \$70,000 in Team Veronica January through March with a Team ID#.

Robert Jones becomes an Individual in April and his YTD commissions = \$225,000.

- Report John Smith's new team YTD total starting in April as the new YTD total earned as an individual and without a Team ID#.
- Do NOT add a second row for Robert's YTD from January through March; only report the new YTD starting in April.

Year-to-Date Totals that Do NOT Change

- Affiliates whose YTD totals do NOT change, must enter their current YTD totals.
- All YTD totals that are reported override the affiliate's previous YTD totals for award purposes.

FOR EXAMPLE:

Sue Sylvester earned \$15,500 YTD total in March. Nothing was earned in April. Report \$15,500 YTD for April. If a zero (0) is reported in April, this will override the previous YTD total.

- Fields that are left blank (no YTD total reported) indicate that the current YTD total equals zero (0).
- Fields that have a zero (0) YTD total reported indicate that any prior YTD total reported will be reported as zero (0).

Please note: Affiliates who terminate, transfer or change teams, will have more than two rows on the template.



Region Responsibilities (cont.)

3 Making adjustments to the YTD Statistics Template:

- Rows can be added to the YTD Statistics Template for affiliates that are not listed on the template.
- Do NOT delete any columns.
- Affiliates whose YTD totals do NOT change must enter their current YTD totals.
- All YTD totals that are reported will override the affiliate's previous YTD totals for award purposes.
- Fields that are left blank (no YTD total reported) indicate that the current YTD total equals zero (0).
- Fields that have a zero (0) YTD total reported indicates that any prior YTD total reported will be reported as zero (0), overriding any prior YTD total reported.



Submitting Completed File to RE/MAX, LLC

- The deadline for submitting completed reports to RE/MAX, LLC is the 15th of every month.
- Email completed reports to: awards@remax.com or mglose@remax.com.

