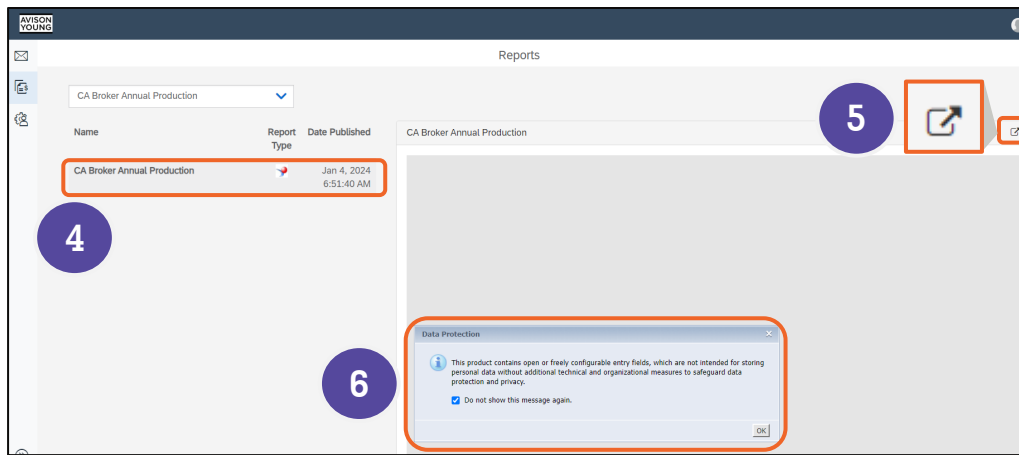
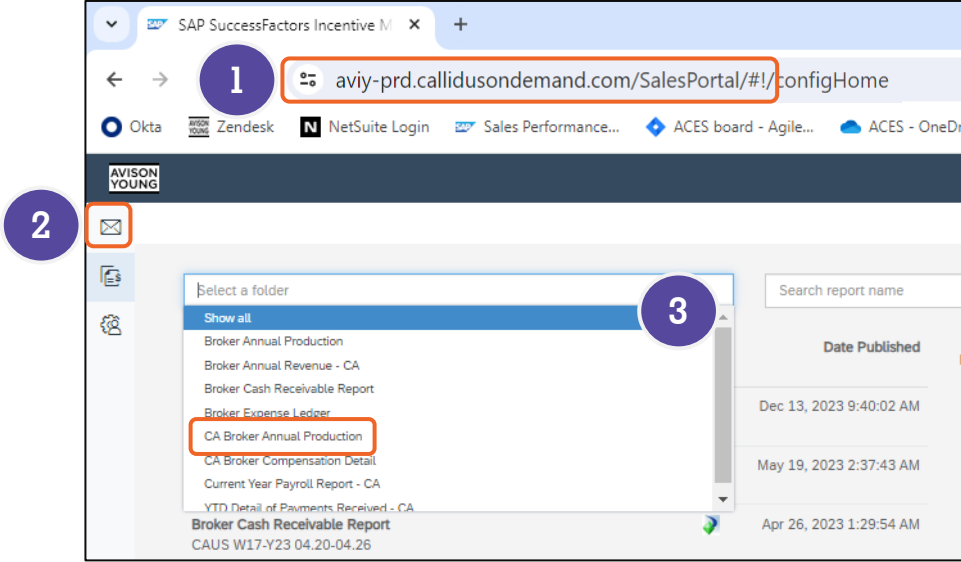


Broker Reports: CA Broker Annual Production

The CA Broker Annual Production report is intended to provide an incremental view of the deals that contribute to a Canadian Fee Earner’s Production accumulation within a given year. This report will display the net impact of any change to a specific deal’s production and/or commission split calculation for each invoice on a given day. This report currently does not display the Production impact of OTTE recoveries. If you require a report that includes recovered OTTE amounts, please contact your Local Revenue Processor.

Accessing the Report:

1. Access the SAPC system:
[https://aviy-prd.callidusondemand.com/SalesPortal/#/!](https://aviy-prd.callidusondemand.com/SalesPortal/#/)
2. Navigate to the reports tab
3. Click on the “Select a Folder” dropdown and choose *CA Broker Annual Production*
4. Click to open the report
5. To open the report in a larger screen, click the “Open in a new tab” icon at the top right of the report.
6. If a pop-up message displays, click the box for “Do not show this message again” and click OK.



Broker Reports: CA Broker Annual Production

Running the report:

Upon opening, the report will default to the current year.

- To review the filters, click on the Analyze button at the top of the screen
***If there isn't any activity for a broker for the current year, no selection will be made by the system.
- To change or add a year to the selection, click on the Production year filter and select one or more years for which to run the report. Click OK to run the report based on the selected year(s).

Exporting the report:

- To export the report, click the Export icon at the top of the report.
- The system will default to export the report as excel. To export as PDF, click the PDF item, then click the desired type from the left panel.
- Click Export to export the file.

The screenshot displays the CA Broker Annual Production report interface with several steps highlighted by numbered callouts:

- Step 7:** The 'Analyze' button in the top navigation bar is highlighted with a blue circle containing the number 7. A red box highlights the filter icon (a funnel) next to it.
- Step 8:** The 'Production Year' filter dropdown is highlighted with a blue circle containing the number 8. A red box highlights the list of years (2020-2024) and the 'OK' button at the bottom right of the dropdown.
- Step 9:** The 'Export to' dialog box is shown with a blue circle containing the number 9. A red box highlights the 'Excel' option in the left-hand menu.
- Step 10:** The 'Export to' dialog box is shown with a blue circle containing the number 10. A red box highlights the 'All reports' and 'CA Broker Annual Production (Current Report)' items in the list.
- Step 11:** The 'Export' button in the bottom right corner of the 'Export to' dialog box is highlighted with a blue circle containing the number 11.

Broker Reports: CA Broker Annual Production

Report Review:

YTD Broker Production: Displays the total production sum for the selected year(s).

Year: Production Year for which the activity is recorded.

Comp Date: The date on which the activity for the particular invoice was recorded.

Accounting Date: The accounting period in which the day's activity on this particular invoice was recorded.

Deal ID: The Deal ID associated with the invoice related to the impact to production on a particular day. This is generated as of the date the activity was recorded.

Deal Name: Deal Name associated with the invoice related to the production impact as of the date the activity was recorded.

Invoice Number: Invoice number associated with the invoice related to the production impact on a particular day. This is generated as of the date the activity was recorded.

Broker's Production: The net production impact for a specific day's activity to that particular invoice.

Brokers YTD Production: The aggregate total of the broker's year to date production.

Commission Split %: The calculated split attributed to the day's net impact of the changes to a particular invoice. This is calculated as Estimated Net Commissions divided by Broker's Production.



							Smith, John ABCD123456789 TORDT - Toronto Downtown 219-Avison Young Commercial Real Estate Services, LP			
CA Broker Annual Production							Report Generated: 1/15/24 Report Currency: CAD			
YTD Broker Production Year 2023: \$151,376.57										
Production Year 2023										
Year	Comp Date	Accounting Date	Deal ID	Deal Name	Invoice Number	Broker's Production	Broker's YTD Production	Commission Split %	Estimated Net Commissions	
2023	1/18/2023	JAN 2023	1234567890	ON - 123 Main Street - ABC Company	20230121452516	\$1,323.13	\$1,323.13	50.00%	\$661.57	
2023	2/21/2023	FEB 2023	2345678901	ON - 547 West Avenue - Smith Co.	20230221608821	\$8,748.67	\$75,647.05	50.00%	\$4,374.34	
2023	2/21/2023	FEB 2023	2345678901	ON - 547 West Avenue - Smith Co.	20230221608921	\$8,748.67	\$84,395.72	50.00%	\$4,374.34	
2023	2/22/2023	FEB 2023	2345678901	ON - 547 West Avenue - Smith Co.	20230221609021	(\$8,748.68)	\$167,731.71	50.00%	(\$4,374.34)	
2023	4/5/2023	MAR 2023	3456789012	ON - 2408 Red Street - Avison Holdco Inc.	20230321781627	\$9,875.00	\$177,606.71	50.00%	\$4,937.50	
2023	4/12/2023	APR 2023	4567890123	ON - 148 Queen St. - X Inc.	20230421862212	\$751.84	\$178,358.55	50.00%	\$375.92	
2023	4/24/2023	APR 2023	5678901234	ON - 420 Steeles Ave. - Jiffy Lube Ltd.	20230421864213	\$15,086.21	\$193,444.76	50.00%	\$7,543.11	
2023	4/24/2023	APR 2023	6789012345	ON - 77 City Centre Dr. - Avison Young Canada Inc.	20230421906124	\$96,988.50	\$290,433.26	52.08%	\$50,515.91	
2023	5/11/2023	MAY 2023	7890123456	ON - 160 West Avenue - Smith Holding Ltd.	20230521934411	\$3,556.80	\$293,990.06	55.00%	\$1,956.24	
2023	5/11/2023	MAY 2023	7890123456	ON - 160 West Avenue - Smith Holding Ltd.	20230521934511	\$3,556.80	\$297,546.86	55.00%	\$1,956.24	
2023	5/26/2023	MAY 2023	8901234567	ON - 5485 Harvester Blvd - Meta Inc.	20230522085726	\$5,285.20	\$315,194.76	55.00%	\$2,906.86	
2023	9/12/2023	SEP 2023	90123456789	ON - 1234 Yonge St. - West Inc.	20230922545812	\$6,204.43	\$764,153.53	70.00%	\$4,343.10	
2023 Total:						\$151,376.57			\$79,570.77	
Totals:						\$151,376.57			\$79,570.77	

Estimated Net Commissions: The net impact to the broker's estimated commission on the invoice based on Broker's Production multiplied by Commission Split %. This amount is calculated excluding any OTTE or OTBE deductions.

Yearly Total: Displays the totals for each year for Broker's Production and Estimated Net Commissions.

Report Total: Displays the totals for all selected years for Broker's Production and Estimated Net Commissions