



TRIPS

# Agent leaderboard

The Agent leaderboard report ranks every agent in your org by invoiced revenue, with paid, net commission, and invoice count alongside. Top-three podium highlighting, a visual progress bar per row, and a sensible single-row degenerate case for solo-agent agencies.

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The Agent leaderboard (at </reports/leaderboard>) ranks everyone in your agency with Trips access by what they invoiced in the selected period, with paid revenue, net commission, and invoice count alongside. It is the fastest answer to *"who is winning?"* and the easiest report to glance at during a team huddle.

#### ADVISOR TIP

**Use it as a KPI strip, not a stack rank.** The three numbers above the table — Team invoiced, Team net commission, Total invoices — are the bit an agency owner actually cares about week to week. The podium is the dopamine.

## How agents are listed

The roster is tenant-scoped to your org's Trips users only. Anyone with Trips access in your agency shows up — including teammates who have not invoiced a single trip in the period (they just show as zeros). Anyone without Trips access in this org is excluded entirely, even if they exist on the platform under a different agency.

#### ADVISOR TIP

**"Agent" means the invoice creator.** Each row totals the invoices whose `created_by_user_id` matches that user. A trip can be co-owned, but every invoice has exactly one creator — that is the attribution the report uses.

# The four data columns

## Invoiced

Sum of every non-draft, non-cancelled invoice whose **issue\_date** falls in the period. The default sort.

## Paid

Sum of **amount\_paid\_cents** on the same invoices. The portion clients have actually paid.

## Net commission

Sum of the agent's share of every line item whose commission was **received** in the period — gross × agency-share %.

## Invoices

Count of invoices created in the period. Useful as a velocity proxy when revenue is lumpy.

# The podium

The top three rows get special treatment — a trophy badge on rank 1, a silver "2" on rank 2, and a bronze "3" on rank 3. The progress bar in the third column is sized relative to the top row's Invoiced amount, so visually you can read at a glance who is at 90% of the leader vs who is at 10%.

### ADVISOR TIP

**Ties resolve by name.** Two agents at the same Invoiced amount get ranked alphabetically by name. We do not attempt a tiebreaker on Paid or Net commission — the visual ranking is for the team huddle, not for HR.

# Solo-agent agencies

If you are the only agent in your org, the report still renders — one row, ranked #1, with the trophy badge. The progress bar fills to 100% (which is true; you are also the bottom). The three KPIs above the table become a single-agent dashboard, which is honestly more useful than the rank itself.

### ADVISOR TIP

**For solo agents, the Sales summary report is the better read.** It gives you the same revenue picture with prior-period deltas and monthly trend, which the leaderboard does not show.

# Period semantics

The leaderboard honors the same period picker as every other report — preset windows (This month, Last month, This quarter, This year, Last year, All time) plus a Custom from/to. Three things are worth knowing about how the period applies:

- **Invoiced + Paid + Invoices** are scoped by invoice **issue\_date**.
- **Net commission** is scoped by **commission\_received\_date** — money in the door this period, not money expected this period.
- The report does not currently compute prior-period deltas. If you need "Sarah's Q1 vs Q4," run the report twice with different windows.

## What is not on the leaderboard

A few things are deliberately absent:

- **Conversion rate** — a proposal-to-booking number lives on the Booking funnel report, not here. The leaderboard is post-sale.
- **Sales goal vs actual** — there is a placeholder for a per-agent annual goal, but the column is not wired to a UI today. When it ships, it will read from each user's profile.
- **Trips count** — only invoice count. A trip with no invoice does not contribute, by design — the leaderboard is a revenue ranking.

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