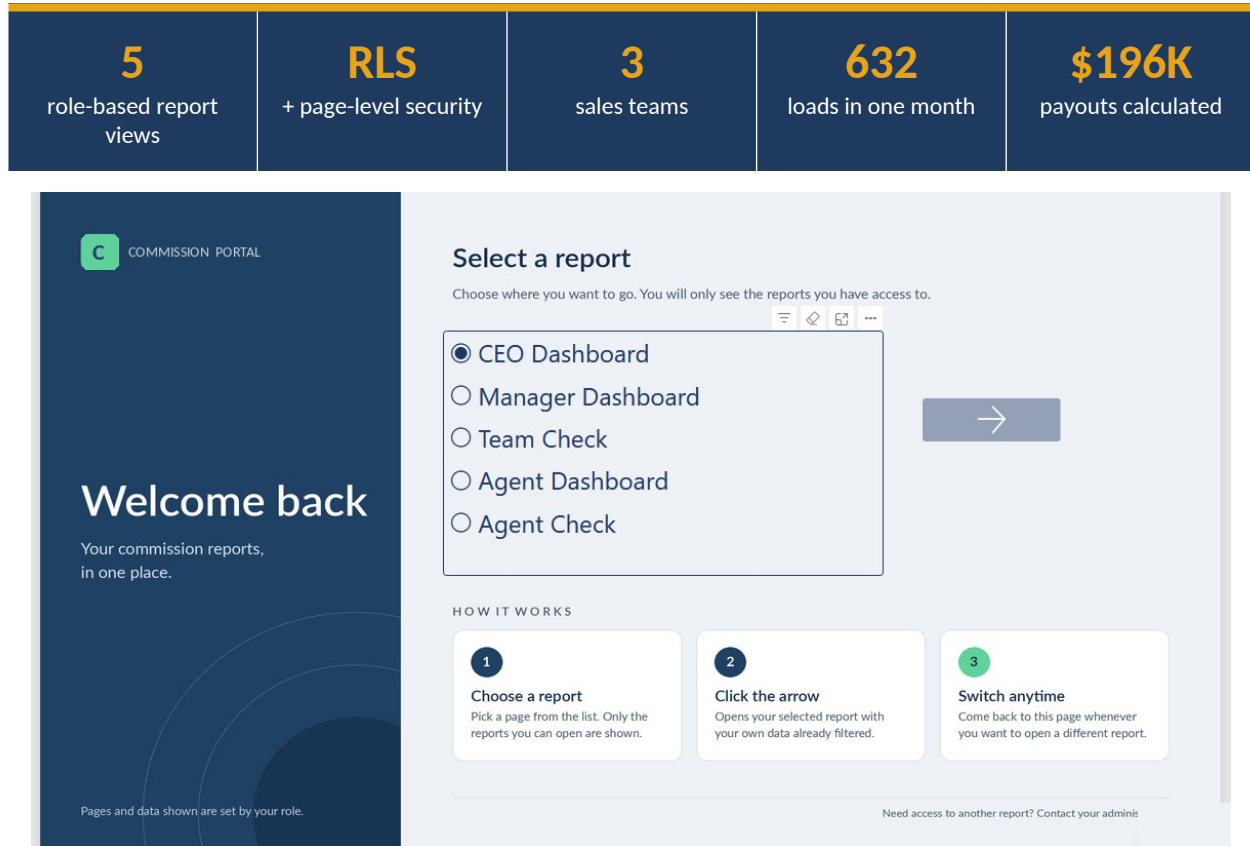


Secure Commission Reporting Portal

How a US freight brokerage replaced manual commission spreadsheets with one Power BI portal where the CEO, managers and agents each see only their own pages and their own numbers.



Role-based landing page: each user sees only the reports their role allows, picks one, and clicks the arrow to open it with their own data already filtered.

Project at a Glance

Client	A US freight brokerage (name withheld)
Industry	Transportation & logistics: freight brokerage with team-based sales agents
Business problem	Calculating and sharing agent, team and executive commission securely, accurately and on time
My role	Power BI Developer: data model, commission logic in DAX, row-level and page-level security, report and UX design
Tools & stack	Power BI Desktop & Service, DAX, Power Query (M), row-level security

	(RLS), USERPRINCIPALNAME(), dynamic page navigation, bookmarks & buttons
Users	CEO / executives, team managers and individual sales agents
Deliverables	Secure landing portal, CEO Dashboard, Manager Dashboard, Team Check, Agent Dashboard and Agent Check pages

1. Executive Summary

In freight brokerage, commission is the most sensitive number in the business. Agents are paid a share of the profit on every load they book, teams carry their own expenses, and executives take their own split. Before this project, these numbers were worked out by hand, and every person could not be given the same file without exposing everyone else's pay.

I built a single Power BI report that calculates every commission automatically from load-level data and enforces security at two levels. Row-level security makes sure each person only sees their own data. Page-level security makes sure each person only sees the pages their role is allowed to open. A custom landing page ties it together: users pick a report from a list that only shows what they can access, click one arrow, and land on their own numbers.

The result: one secure, self-service portal that replaced manual commission statements, with every dollar traceable from the company total down to an individual load.

2. The Challenge

- **Highly sensitive data.** Agents must never see another agent's loads or pay, and managers must only see their own team.
- **Different users need different pages.** Executives need company-wide splits; agents need a simple statement of their own loads. Power BI has no built-in page-level security, so one report normally shows the same pages to everyone.
- **Multi-step commission logic.** Load profit, profit adjustments, a 65% team split, team expenses and separate CEO and CFO shares all had to be calculated in the right order.
- **Negative-profit loads.** Some loads lose money, and those losses must correctly reduce the commission instead of being ignored.
- **Trust and transparency.** Every payout had to be explainable down to the load, so agents could trust their check.

3. Security Architecture: RLS + Page-Level Security

Security was the core of this project. It works on two layers that run together every time someone opens the report.

3.1 Layer 1: Row-Level Security (who sees which data)

- **Security mapping table:** each user's login email is linked to their role, their team and their agent key (e.g. Team|Agent).
- **Dynamic RLS with USERPRINCIPALNAME():** Power BI reads who is logged in and filters the data automatically, so one set of roles works for every user instead of a separate role per person.
- **Filter propagation:** the security filter flows from the user table through the Team and Agent dimensions to the load fact table, so every visual, card and total respects it.
- **Role scopes:** executives see all teams and agents, managers see only their own team, and agents see only their own loads.
- **Tested before release:** each role was checked with "View as role" in Power BI Desktop and Service to confirm no data leaks across teams or agents.

3.2 Layer 2: Page-Level Security (who sees which pages)

- **Page access table:** lists which report pages each role may open, and is itself protected by RLS.
- **Secure navigation list:** the landing page's report list is built from that table, so a user only ever sees the pages they are allowed to open.
- **Dynamic arrow button:** a DAX measure returns the selected page name and the button uses conditional page navigation to open it. No page can be reached by a button the user should not have.
- **Hidden pages:** all report pages are hidden from the page tabs, so the landing page is the only way in.
- **Data still protected underneath:** even if a page were reached another way, RLS still limits the data on it to that user's own rows.

3.3 Who Sees What

Role	Pages available	Data scope
CEO / Executive	CEO Dashboard, Manager Dashboard, Team Check, Agent Dashboard, Agent Check	All teams and all agents
Team Manager	Manager Dashboard, Team Check, Agent Dashboard, Agent Check	Own team only
Sales Agent	Agent Dashboard, Agent Check	Own loads only

4. Commission Logic in DAX

All commission rules live in DAX measures, so they are calculated the same way for every user, every time. Each step builds on the one before it:

Measure	How it is calculated
Load Profit	Line haul revenue minus driver (carrier) pay, summed across loads.
Adjusted Profit	Load profit after the business's profit adjustments.
65% Split Amount	65% of adjusted profit: the team's commission share.
Final Team Check	65% split minus that team's expenses: what the team is actually paid.
CEO Share \$ / CFO Share \$	5% of adjusted profit each.
Main Total \$	65% split + CEO share + CFO share: the total commission payout.
Agent Final Check	The agent's share calculated from adjusted profit on their own loads.

- **Loss-making loads handled correctly:** when gross profit is negative, the commission on that load is negative too, so it reduces the agent's total instead of being dropped.
- **Reported vs. final:** the agent view shows both the commission reported per load and the final check after adjustments, so differences are visible and explainable.
- **Verified totals:** team rows add up exactly to company totals across every measure (e.g. 3 teams = 632 loads = \$166,977 final team check).

5. Inside the Report

COMMISSION DASHBOARD

CEO Dashboard

Company-wide commission, executive split & agent performance

Home

CEO Dashboard

Manager Dashboard

Team Check

Agent Dashboard

Agent Check

Date

1/1/2024

12/31/2030

Team

All

Agent

All

Total Loads

632

Load Profit

\$276,703

Adjusted Profit

\$261,396

Team Expenses

\$2,930

Final Team Check

\$166,977

Team & Commission Detail

Team	Total Loads	Load Profit	Adjusted Profit	65% Split Amount	Team Expenses	Final Team Check	CEO Share \$	CFO Share \$	Main Total \$
Winners	299	\$90,448.50	\$85,777.00	\$55,755.05	\$1,390.00	\$54,365.05	\$4,288.85	\$4,288.85	\$64,332.75
GW	282	\$172,995.12	\$164,823.60	\$107,135.34	\$1,325.00	\$105,810.34	\$8,241.18	\$8,241.18	\$123,617.70
Empire	51	\$13,259.13	\$10,794.98	\$7,016.74	\$215.00	\$6,801.74	\$539.75	\$539.75	\$8,096.24
Total	632	\$276,702.75	\$261,395.58	\$169,907.13	\$2,930.00	\$166,977.13	\$13,069.78	\$13,069.78	\$196,046.69

CEO Share \$

\$13,070

CFO Share \$

\$13,070

CEO/CFO Combined \$

\$26,140

Main Total \$ (Team + CEO + CFO)

\$196,047

MonthName

July-2026

Total Loads	Load Profit	Adjusted Profit	65% Split Amount	Team Expenses	Final Team Check	CEO Share \$
632	\$276,702.75	\$261,395.58	\$169,907.13	\$2,930.00	\$166,977.13	\$13,069.78
632	\$276,702.75	\$261,395.58	\$169,907.13	\$2,930.00	\$166,977.13	\$13,069.78

CEO Dashboard: company-wide load profit, adjusted profit, team expenses and final team check, with a team-by-team commission breakdown and the executive CEO/CFO split.

What makes this page work: the CEO sees the whole commission picture on one screen: what each team earned, what each team is paid after expenses, and the executive shares, with date, team and agent filters and a monthly breakdown below.

COMMISSION DASHBOARD									
Agent Dashboard — My Loads & Commission									
Total Loads		Load Profit		Adjusted Profit		Agent Final Check			
51		\$13,259		\$10,795		\$7,017			
LoadNumber	AgentKey	LoadDate	Carrier	LineHaul	DriverPay	GrossProfit	AgentCommission_Reported	AgentPct	
514565	Empire	Wednesday, July 01, 2026		4,200.00	3,700.00	500.00	325.00	65%	
514607	Empire	Wednesday, July 01, 2026		2,300.00	1,824.21	475.79	309.26	65%	
514624	Empire	Wednesday, July 01, 2026		0.00	0.00	0.00	0.00	65%	
514696	Empire	Thursday, July 02, 2026		2,800.00	2,087.37	712.63	463.21	65%	
514704	Empire	Thursday, July 02, 2026		5,400.00	4,035.00	1,365.00	887.25	65%	
514738	Empire	Friday, July 03, 2026		0.00	0.00	0.00	0.00	65%	
514781	Empire	Monday, July 06, 2026		5,000.00	4,626.32	373.68	242.89	65%	
514793	Empire	Monday, July 06, 2026		4,400.00	4,089.47	310.53	201.84	65%	
514794	Empire	Monday, July 06, 2026		0.00	457.89	-457.89	-297.63	65%	
514796	Empire	Monday, July 06, 2026		0.00	0.00	0.00	0.00	65%	
514797	Empire	Monday, July 06, 2026		0.00	384.21	-384.21	-249.74	65%	
514820	Empire	Monday, July 06, 2026		3,500.00	2,407.37	1,092.63	710.21	65%	
514824	Empire	Monday, July 06, 2026		2,000.00	2,289.47	-289.47	-188.16	65%	
514840	Empire	Monday, July 06, 2026		0.00	194.74	-194.74	-126.58	65%	
514857	Empire	Monday, July 06, 2026		3,700.00	2,617.89	1,082.11	703.37	65%	
514867	Empire	Tuesday, July 07, 2026		2,400.00	2,775.79	-375.79	-244.26	65%	
514893	Empire	Tuesday, July 07, 2026		2,700.00	1,508.42	1,191.58	774.53	65%	
514894	Empire	Tuesday, July 07, 2026		3,700.00	3,356.84	343.16	223.05	65%	
Total				98,800.00	85,540.87	13,259.13	8,618.41	65%	

Agent Dashboard: an agent sees only their own loads, from load number, date and carrier to line haul, driver pay, gross profit and commission. Agent and carrier names are blurred for confidentiality.

What makes this page work: agents can check every single load behind their check. That transparency removes disputes and back-and-forth with managers about pay.

5.1 All Report Pages

Page	What it answers
Home (landing portal)	Which reports can I open? One click to my own data.
CEO Dashboard	Company-wide commission, executive split and team performance.
Manager Dashboard	How is my team performing, load by load and agent by agent?
Team Check	What is my team's final payout after the split and expenses?
Agent Dashboard	Which loads did I book and what did each one earn me?
Agent Check	What is my final commission check for the period?

5.2 User Experience Design

- **Guided landing page:** a "How it works" panel explains the three steps (choose, click, switch), so new users need no training.
- **Consistent navigation:** a header button bar on every page plus a back arrow to return home.

- **Clear wording:** messages like "You will only see the reports you have access to" tell users exactly why their list looks the way it does.
- **Matching layout:** filters at the top, KPI cards, then detail tables, the same on every page.

6. Business Impact

- **No more manual statements:** commission is calculated automatically from load data instead of being worked out by hand each period.
- **Secure by design:** one report safely serves executives, managers and agents, with no separate files to build or email.
- **Fewer pay disputes:** agents can see every load behind their check.
- **Consistent rules:** the 65% split, team expenses and executive shares are applied identically for everyone.
- **Easy to scale:** adding a new agent or team means adding a row to the security table, not rebuilding the report.

7. Full List of Deliverables

Deliverable	Description
Data model	Load fact table with Team, Agent, Date and security dimensions.
Commission measures	Load profit, adjusted profit, 65% split, team expenses, final team check, CEO/CFO shares, main total and agent check.
Row-level security	Dynamic RLS using USERPRINCIPALNAME() and a user-to-role/team/agent mapping table.
Page-level security	Role-based page access table, secure navigation list and dynamic page navigation.
Landing portal	Branded home page with guided "How it works" steps.
5 role-based report pages	CEO Dashboard, Manager Dashboard, Team Check, Agent Dashboard and Agent Check.

8. Skills Demonstrated

Security	Dynamic row-level security, page-level security design, role testing
DAX	Multi-step commission logic, percentage splits, expense deductions, page-navigation measures

Data modeling	Star schema with security dimension and correct filter propagation
Report & UX design	Custom landing portal, guided navigation, hidden pages, consistent layout
Domain knowledge	Freight brokerage: loads, line haul, driver pay, gross profit and agent commission
Accuracy	Totals reconciled across teams, negative-profit loads handled correctly

Need Secure Reporting for Your Team?

If you need one Power BI report that shows each person only their own numbers, whether for commissions, sales targets or regional performance, I can design the security and the report so it is safe, accurate and easy to use.

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