

Job Toolbar-Commissions

Last Modified on 01/11/2023 1:40 pm EST

The Commissions form is used to list the commissions that will be paid to the Salesperson listed on the Work Order form and any other employee override commissions for a Job. You have the option of manually entering commission line items or auto-filling the form based on the setup information for the Job Type and the employee commission setup for the Salesperson assigned to the job or a combination of the two methods.

The Commissions form is divided into three sections; the Header, Commission List, and the Manual Commissions section.

Each of these sections will be described below.

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Header Section

The Header section of the Commissions form has several functions available. When opening this form, the header section will automatically fill with information based upon the Salesperson assigned to the Job on the Work Order form, and the Install Charges and Recurring Lines entered on the Job.

When clicking the Auto Fill button, the Commission List area will fill in with the commission amounts for the Salesperson assigned to the job based upon the Employee setup of the Salesperson and the commission type setup for the Job Type.

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In the example provided below, after clicking the Auto Fill button, five commission lines fill into the Commission List area. Two commission lines are associated with Matt Miller, who is the Salesperson for the Job. One commission line is listed for George Miller, who is the Commission Override employee assigned to the Employee setup of Matt Miller.

The Commission Types listed are all the possible commission types assigned to the Job Type for the Job. If certain commission types do not apply to the current Job, you may highlight the commission line, then click the Delete button at the lower right of the form.

In the Header area is the Commissionable % field. This field is used as a basis for calculating the sales commissions for non-recurring commission types. In the example provided below, the commission type of Install is a non-recurring commission type. The application calculated the commissionable amount for each of these commission lines by taking the total amount of Install Charges times the commissionable % rate. The commissionable amount is then multiplied by the commission rate assigned to the employee for the commission type to arrive at the amount of commission to be paid.

Commissions may be split between two salespeople by selecting the Split Sales Production option in the Header section of the Commission form. Continue on for information on splitting commissions.

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Splitting Commissions

The SedonaOffice application allows your company to split commissions for non-recurring type Install Charges between two salespersons. The commissions split is calculated on a percentage basis. For the Salesperson 1 enter a percentage rate. Next select the radio button to the left of the Salesperson 2 field then select the Salesperson from the drop-down list. The percentage rate for the second salesperson will automatically fill in with the rate that is 100 less

the rate assigned to Salesperson 1.

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Manual Commission Lines

The Commission amounts applied to the Job may be automatically calculated by using the Auto-Fill button, manually entering commission lines or a combination of the two methods to arrive at the desired amounts.

Manual commissions are entered in the lower area of the Commission form.

The User may select the Salesperson from a drop-down list by selecting the checkbox Select from all other Salespeople. Once a Salesperson is selected, the User will select the Commission Type from the drop-down list.

Manual commissions are always calculated at the percentage rate of 100%; this field may not be modified. The User enters the amount of commission to be paid to the Salesperson in the Commissionable field.

Once the commissionable amount is entered, click the Apply button located at the lower right of the form. The User may enter as many manual commission lines as needed.

In the example below, the Salesperson is receiving a commission of \$25.00 for signing up the customer for auto-payment of recurring services with a credit card.

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