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How Do You Create a Commission Table?

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How Do You Create a Commission Table?

What is a Commission Table?

Explanation: Commission tables allow you to have the system automatically calculate a salesperson's commission percent, on a sliding scale instead of a flat rate, on a quote, order, or invoice. This calculation can either be based on the profitability of commissionable products or on a salesperson's YTD invoiced sales.

Multiple commission tables may be set up (possibly for different types of orders or for individual salespeople). However, a commission table may be assigned to multiple salespersons.

How do You add a Commission Table?



To add a Commission Table, Click on the New:



How do You set up a new Commission Table?

New Copy Save Delete Cancel Close

Description

Based On (Select)

^ Commission Table Ranges (0)

(Select)

YTD Sales

Gross Profit %

Description: Each table needs a unique name

Based On: YTD Sales or Gross Profit %

When adding a commission table regardless of the Based on type, you will need to add levels.

To add a level you simply click on the Expander for the Commission Table Ranges, then click +Add Commission Range.

New Copy Save Delete Cancel Close

Description Year to date commission table

Based On YTD Sales

^ Commission Table Ranges (0)

Beginning	Ending	Commission %
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+ Add Commission Range

Expand Commission Table Ranges
Then Add Commission Range

For a Commission Table based on YTD (Year to Date) Sales, your levels will be based on the amount of sales the Salesperson has had Year to Date. The beginning level will start with 0.00 and the last level will end with \$99,999,999.99. This will insure that any dollar amount will have an associated commission %. Unlimited ranges may be setup. Each range will contain a commission %.

Description: Year to date commission table
Based On: YTD Sales

Commission Table Ranges (6)

Beginning	Ending	Commission %
\$0.00	\$500.00	0.00%
\$500.01	\$10,000.00	6.00%
\$10,000.01	\$50,000.00	8.00%
\$50,000.01	\$100,000.00	10.00%
\$100,000.01	\$250,000.00	15.00%
\$250,000.01	\$99,999,999.99	18.00%

+ Add Commission Range

Beginning Level \$0.00
 Ending Level \$99,999,999.99

For a Commission Table based on Gross Profit, the beginning range will start with 0.00% and the ending range will end with 99.99%. This is to insure that all Gross Profit % will have an associated commission %. Unlimited ranges may be setup. Each range will contain a commission %

Description: GP Floor
Based On: Gross Profit %

Commission Table Ranges (4)

Beginning	Ending	Commission %
0.00%	19.99%	0.00%
20.00%	29.99%	15.00%
30.00%	39.99%	20.00%
40.00%	99.99%	25.00%

+ Add Commission Range

Beginning Level 0.00%
 Ending Level 99.99%

[How do You add a commission table to a Salesperson?](#)

A commission table may be assigned to a salesperson within their salesperson resource. When the salesperson is then added to a customer, quote, order, invoice or program, the commission table will default in also. However, if a salesperson resource does not contain a commission table, it may be manually added to the salesperson record within a customer, quote, order, invoice or program.

Note: When assigning a commission table to a salesperson, you will still want to assign the salesperson a default commission percent greater than

0.00 as 0.00 will be considered non-commissionable and the table won't be read.

Salespersons Salesperson* x

New Copy Save Delete Cancel Close

Code 003 Name bill blank Status Active Employee

^ Commission Structure

Commission % 35.00% Based On Order Gross Profit % With Table GP Floor Update Commission Rate

Commission Expense Ledger 700 Comm Exp/Salary Sales Per Edit

Add a Commission Table

Default Commission %

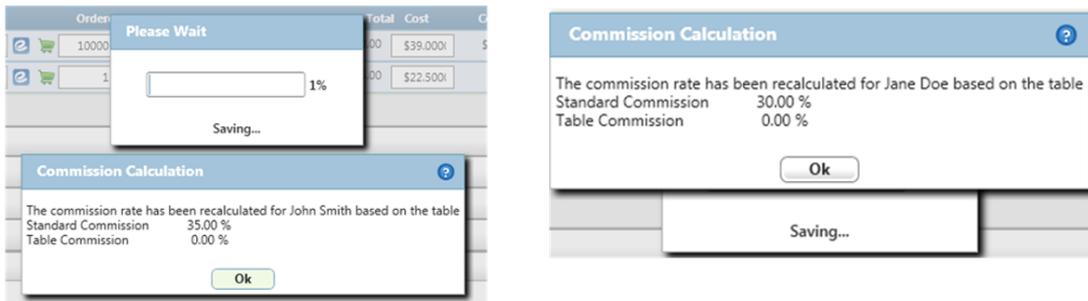
Upon saving the record (or processing the invoice), the program will check to see if any salespersons have been assigned a commission table. Based on the type of commission table, each salesperson's commission percent will be checked and determined if a change is needed.

Note: In order for the commission recalculation to occur for either commission table type (GP% or YTD Sales), the commissionable products/charges must originally have a commission percent greater than 0.00 as any products/charge with a 0.00 percent will be considered non-commissionable.

If a product/charge has a 0.00 commission percent, it will not change with the recalculation and will remain at 0.00 commission percent. If all products have a 0.00 commission percent, the commission on the quote/order/invoice will not be recalculated, even if there is a commission table assigned.

Commission Calculation Based on GP% Table - The gross profit for all products and additional charges which have a commission percent greater than 0.00 will be accumulated to determine the commissionable gross profit %. Products with a 0.00 commission percent will be ignored.

If the new commission % is different than the commission % existing on a product, the percent on all commissionable products/charges will be changed to the new percent. A window will appear notifying you of the new commission percent.



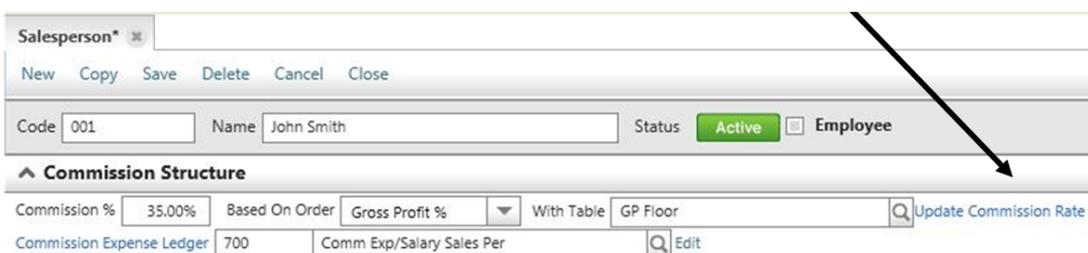
Commission Calculation Based on YTD Sales Table - Each quote, order, or invoice contain a date (quote date/order date/invoice date). Based on that date/time (all the way to midnight), the salesperson's YTD Sales will be accumulated (from the beginning of that calendar year) and checked against the Comm Table to see if the Comm% should be changed.

The final commission percent will be determined by the invoice date, once the in-invoice is created.

Example: A quote is entered on March 15th. The salesperson's YTD sales will be determined by invoiced sales between January 1st and March 15th. That quote is turned into an order on April 12th. The salesperson's YTD sales used to determine the order's commission percent will then be determined by invoiced sales between January 1st and April 12th, so the commission percent may change. Then, on June 20th, the order has an invoice created. The salesperson's YTD sales used to determine the invoice's commission percent will then be determined by invoiced sales between January 1st and June 20th.

Once you have added a Commission table to a Salesperson Resource you may wish to update current orders and customers so this new table is used.

Use this function to update Order or Customer resources commission rate.



Once you click the hyper link, click on the Resource to update and select, you will then have the choice of which to update Open

Orders or Customers.

The screenshot shows the 'Select Data To Update' dialog box. The 'Resource To Update' dropdown menu is open, showing options: '(Select)', 'Open Orders', and 'Customers'. The 'Commission %' is set to 35.00%. The 'Based On Order' is set to 'Gross Profit %'. The 'With Table' dropdown is set to '(Select)'.

You can select all orders by putting a check in the Order Date in the header bar.

The screenshot shows the 'Select Data To Update' dialog box with a table of orders. The 'Order Date' column has checkboxes for each row. The 'Commission Structure' is set to 'Open Orders' and 'Commission %' is 35.00%. The 'With Table' is set to 'GP Floor'.

Order Date	Order	Customer	Rate	Table	Primary
<input type="checkbox"/>	6/01/2010	104	Dan Deery Toyota	35.00%	Yes
<input type="checkbox"/>	6/01/2010	105	Dan Deery Toyota	35.00%	Yes
<input type="checkbox"/>	6/04/2010	106	LSB Financial	35.00%	No
<input type="checkbox"/>	6/06/2010	107	Johnson Dental Care	35.00%	Yes
<input type="checkbox"/>	6/08/2010	109	State Farm Insurance	35.00%	Yes
<input type="checkbox"/>	6/10/2010	111	Dermatology Associates PC	35.00%	Yes

Once the orders you wish to update have been selected, click the update.

The screenshot shows the 'Select Data To Update' dialog box with the 'Update' button highlighted. The 'Order Date' column has checkboxes for each row. The 'Commission Structure' is set to 'Open Orders' and 'Commission %' is 35.00%. The 'With Table' is set to 'GP Floor'.

Order Date	Order	Customer	Rate	Table	Primary
<input type="checkbox"/>	6/01/2010	104	Dan Deery Toyota	35.00%	Yes
<input checked="" type="checkbox"/>	6/01/2010	105	Dan Deery Toyota	35.00%	GP Floor
<input type="checkbox"/>	6/04/2010	106	LSB Financial	35.00%	No
<input type="checkbox"/>	6/06/2010	107	Johnson Dental Care	35.00%	Yes
<input type="checkbox"/>	6/08/2010	109	State Farm Insurance	35.00%	Yes
<input type="checkbox"/>	6/10/2010	111	Dermatology Associates PC	35.00%	Yes

To update Customer Resources, you can select all Customers by checking Name in the Header Bar.

Select Data To Update

Update Close

Resource To Update Customers

Commission Structure

Commission % 35.00%

Based On Order Gross Profit %

With Table GP Floor

Name	Rate	Table	Primary
<input type="checkbox"/> Dan Deery Toyota	35.00%		Yes
<input type="checkbox"/> Community Motor Co Inc	35.00%		Yes
<input type="checkbox"/> Holdiman Motor Inc	35.00%		Yes
<input type="checkbox"/> State Farm Insurance	35.00%		Yes
<input type="checkbox"/> Principal Financial Group	35.00%		Yes
<input type="checkbox"/> LSB Financial	35.00%		No
<input type="checkbox"/> Cedar Valley Medical Specialists	35.00%		Yes
<input type="checkbox"/> Hudson-Reinbeck Veterinary Clinic	35.00%		Yes
<input type="checkbox"/> Johnson Dental Care	35.00%		Yes
<input type="checkbox"/> Cedar Falls Utilities	35.00%		Yes
<input type="checkbox"/> Covenant Clinic Pediatrics	35.00%		Yes
<input type="checkbox"/> Dermatology Associates PC	35.00%		Yes
<input type="checkbox"/> Allstate Insurance: Jim Jacobs	35.00%		Yes
<input type="checkbox"/> Rydell Chevrolet Inc	35.00%		Yes
<input type="checkbox"/> C & S Car Company	35.00%		Yes

Once your selections are complete, click the Update. This will update all Customer Resources selected with the new Salesperson Commission Table setup.