

# Sales Commissions



PowerShift's sales commissions system is flexible and configurable. It will save many hours of staff time by automating and tightly controlling commission processing with safeguards in place to prevent abuse. The system is dynamic; if the commission rate structure is changed, open orders are updated at the press of a button. The accurate production of commission payments will result in maintaining high productivity and satisfaction from staff.

Customer Service Inquiry | Forecast Maintenance | AR Inquiry | Data Dictionary Inquiry | Mfg Order Component Scrap Analysis | Sales Order Maintenance

CA-1 | CHIPS4 QA TEST | SP1 | OE1 | Sales Order Maintenance | 12/18/2012

Order number: CA-100002953

Customer number: C1  
New order - Approved

Ship-to: [ ]  
Cust PO number: 23423  
Date ordered: 12/12/2012  
Date wanted: 12/12/2012  
Sales branch: CA-1 CHIPS4, QA Test  
Ship branch: CA-1 CHIPS4, QA Test  
Ship partial?:   
FOB: DES Destination  
Freight terms: PPB Prepay & Bill  
Ship via: UPS UPS 3 DAY  
Ship via account: [ ]  
Sales rep 1: 10-WC10 Parsons, Joanna  
Split 1: 55  
Cust serv rep: CD Carole Dietrich

Bill-to: Country Classics  
21 Elmwood Drive  
Marysville, CA, 94582-7896, US  
Howard Stills, (496) 569-1234  
Ship-to: Country Classics  
21 Elmwood Drive  
Marysville, CA, 94582-7896, US  
Howard Stills, (496) 569-1234

Special instr: [ ]  
Priority: [ ]  
Dept number: [ ]  
Revenue org cd: \*0 Corporate office  
Price code: 1 Price 1  
AR terms: \*\*\* Net 30 Days  
Tax code: CA 8.00  
Resale lic 1: RESALE-LICENSE-1-AC1C1C1C  
Resale lic 2: RESALE-LICENSE-2-BC1C1C1C  
Sls region: 10WC Sales region 10WC  
Dest customer: C1 Country Classics  
Contact: [ ]  
Entered: KJC 12/12/2012 12:53:00

Order gross: 357.50 US Volume

Sales rep 1	10-WC10	Parsons, Joanna	Split 1	55
Sales rep 2	55-WC10	Larkin, Samuel	Split 2	15
Sales rep 3	25-EC10	Prescott, Damon	Split 3	15
Sales rep 4	30-WC10	Stanton, Gary	Split 4	15

Buttons: Address, Lines, Create ship, OK, Cancel, Apply, Other info, Notes, User fields, Jump, Comm splits

Calculate commission based on order or line items

Split commission among multiple sales reps

Pay commission when order is invoiced or when customer pays

## Commission Inquiry by Sales Rep

Planning Profile Maintenance | Forecast Maintenance | AR Inquiry | Data Dictionary Inquiry | Inventory Status Inquiry | Sales Commission Inquiry by Rep

CA-1 | CHIPS4 QA TEST | SP1 | SCRI | Sales Commission Inquiry by Rep

Sales rep: 10-WC10 Parsons

Customer name	Order no	Net amount	Subj to comm	Comm amount	Proc?	Elig?
Custom Classics	CA-100001463	\$112,000.00	\$110,337.50	\$1,220.00	Y	Y
Custom Classics	CA-100001428	\$215,000.00	\$213,750.00	\$1,220.00	Y	Y
Custom Classics	CA-100001429	\$215,000.00	\$213,750.00	\$1,220.00	Y	Y
Custom Classics	CA-100001432	\$33,000.00	\$32,585.00	\$370.00	Y	Y

### Benefits

- Pay commissions based on the invoice date or upon receipt of cash payment — configurable globally or by customer.
- Commission hierarchies establish who is paid the commission and at what rate.
- Base commissions on the order (same rate for all items) or the lines on the order (rates vary based on item's commission class, product class, or other criteria).
- Classify items and/or customers into commission groups to satisfy complex commission structures.
- Assign sales reps by customer, customer ship-to, sales region, customer type, price category, or other criteria.
- Multiple sales representatives can be paid at different rates on a single order.
- Vary the commission rate based on the customer, item number, customer type, price class, product class, product sub class, commission class or other criteria.

## Administrative Functions

- Sales Commission Archive
- Sales Commission Eligibility
- Sales Commission Hierarchy Maintenance
- Sales Commission Processing
- Sales Commission Rate Maintenance
- Sales Commission Recalculation
- Sales Rep Assignment

## Listings & Inquiries

- Paid Sales Commission Listing
- Sales by Item with Commission Splits
- Sales Commission History Inquiry
- Sales Commission Inquiry
- Sales Commission Inquiry by Rep
- Sales Commission Listing

## System-wide Features

- Standardized user interface is easy to learn; accepts point-and-click or keyboard input.
- Lookups speed record or order retrieval; sort the way you want and use the Restart or Find functions to locate the record you need.
- Each user can set and save sort and selection options for reports and inquiries, reducing the need for custom reports and programming.
- Print to printers, e-mail, fax, PDF, EDI, or Microsoft Excel.
- Information is accessible with pop-up windows, drill downs, and jumps to related programs, reducing the need to switch screens.
- The Data Dictionary supports SQL, Report Generator, and QICLOOK™.
- F1 accesses online help for the program you are running.
- Security system allows users access to selected programs and accounts.

## More Benefits

- If you make changes to commission hierarchies, rates or eligibility, you can apply the changes to open orders by simply pressing a button.
- Flag Individual items as non-commissionable; this can be overridden on an order line basis.
- Different commission rates may be established for order amounts (tiered hierarchy), and percentages. Flat rate commission amounts can also be entered.
- Commission rates are established with effective/expiration dates so changes to the structure can be set up for the future dates.
- System options control whether discounts, freight, miscellaneous charges, AR write-offs and adjustments are included in the amount subject to commission.
- Fully-integrated to GL; posting of commissions is based on criteria you define.

## Commission Calculation

- Default sales representatives and commission splits are displayed as orders are entered and can be maintained as needed.
- When the AR invoice register is processed, sales commission is calculated based on your setup configuration; commission accruals are posted to the general ledger for visibility.
- A maintenance application allows you to account for changes and exceptions after the calculation has been completed.
- Payment of commissions can follow payments for invoices set up with progress payment terms.

## Commission Payment

- Choose to set up payment at the time of the invoice is generated or when the invoice is paid.
- Maintain invoice eligibility as needed.
- Make actual payments via an automated accounts payable process, by entry of a manual check, or export of commissions data for payment by another system such as payroll.
- Using the automated option ensures that the commission details are readily available to PowerShift (including the ability to generate credits if adjustments are made on to the sales invoice).
- Commission checks can be generated separately from other check runs by assigning all sales reps a specific type.
- The register offsets the accrued commission liability account in general ledger.

## Flexibility

- View commissions by customer or sales representative.
- Generate a list of commissions including an estimate of commission on orders not yet invoiced.
- Generate a paid commissions listing.
- You determine what you want to see and when you want to see it.
- All PowerShift reports and inquiries feature user-defined sort and selection criteria.
- Use the job scheduler to execute reports after hours and have them available when you arrive in the morning.
- Route reports to printers, email PDF copies, or output report data to Excel for further manipulation and analysis.