

Commission Plan

Open this screen from **Sales | Commission Plans** menu.

The screenshot shows a software window titled "Commission Plan -" with a standard menu bar (New, Save, Search, Delete, Undo, Duplicate, Close) and a "Details" tab. The form contains the following fields: "Commission Plan Name" (text input), "Description" (text input), "Entity Names" (dropdown menu), "Commission Basis" (dropdown menu), "Payment Received Required" (checkbox), "Calculation Type" (dropdown menu), "Calculation Amount" (text input with value 0.00), "Hurdle" (text input with value 0.00), "Hurdle Annual/Monthly" (dropdown menu), "Hurdle Fixed or Draw" (dropdown menu), "GL Account" (dropdown menu), "Starting Date" (calendar icon), "Ending Date" (calendar icon), and "Active" (checkbox, checked). The bottom status bar shows icons for help, search, and email, the word "Ready", and a page indicator "Page 1 of 1".

Field Description

Commission Plan Name - Enter a unique name for the commission plan.

Description - Enter a description detailing the commission.

Entity Names - Click the combo box button and select the entities that will be on this plan. This field will allow you to select multiple entities.

Commission Basis - Click the combo box button and select the basis for the commission. Options are Hours, Revenue, Units, and Conditional.

Payment Received Required - If checked, in order to calculate for commission, payment must be received on the commission basis above.

Calculation Type - Click the combo box button and select the how the commission will be calculated. Options are Percentage, Flat Amount, and Amount per Unit

Calculation Amount - Enter the amount of calculation. For example, 7% or .01 per unit or \$10,000 flat amount.

Hurdle - Enter the unit/amount that must be reached before the commission will be issued.

Hurdle Annual/Monthly - Select the combo box button and select the

Hurdle Fixed or Draw - Options are Fixed and Draw.

GL Account - Click the combo box button and select the GL Account to be associated to the incentive.

Starting Date - Enter the effective date of the commission plan.

Ending Date - Enter the last day the commission plan will be effective.

Active - Check if the commission plan is still active.

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