Commission Plan

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

Commission Plan -	^ X

New   Save   Search   Delete   Undo   Duplicate   Close

Details

Field	Value
Commission Plan Name:	
Description:	
Entity Names:	⌄
Commission Basis:	⌄
Payment Received Required:	☐
Calculation Type:	⌄
Calculation Amount:	0.00
Hurdle:	0.00
Hurdle Annual/Monthly:	⌄
Hurdle Fixed or Draw:	⌄
GL Account:	⌄
Starting Date:	📅
Ending Date:	📅
Active:	✓

⑦ ◉ ♀ ✉ Ready |◁ ◁   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. Foe 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 yhe

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.

Pages

Pages