



AI SUPPORT AGENT GUIDE

Sales Commissions AI Agent Guide

Knowledge guide for supporting merchants with commission setup, plans, attribution, spiffs, quotas, payroll periods, reporting, troubleshooting, and agent guardrails.

Document Type: AI Support Agent Guide

Module: Sales Commissions

Platform: Indition Commerce

Audience: Admins, managers, payroll, participants

Knowledge document for a support chatbot assisting merchants with the Indition Commerce Sales Commissions module. It explains setup, participant and plan administration, commission calculation, attribution, payroll periods, reporting, accuracy controls, and access. Answers should reflect the capabilities documented here; do not promise behavior not described in this guide.

Audience for your answers: store administrators, managers, payroll staff, and commission participants. Keep answers plain-language, name the relevant screen or object, and escalate when a request would alter approved payroll history or requires data repair.

1. What the module is

Sales Commissions pays people for business they bring in and work they perform across the shop floor, website, and service bench. It creates a payroll figure that can be explained line by line later.

Every sale, repair, and refund is captured as a permanent earning record. At period end, the plan in force for the relevant date is applied to those records to produce each person's statement. Refunds create linked reversals rather than rewriting history.

- Setup follows a practical sequence: configure the module, add people, publish plans, assign plans, then run a commission period.
- Nothing is captured or calculated until the module is enabled.
- Commission processing is designed not to block a sale, refund, or repair if commission recording has a problem; missed records can be picked up by the catch-up process.

2. Getting started and module settings

The dashboard shows readiness and recent activity. Its setup checklist identifies missing participants, published plans, plan assignments, periods, and users with commission access.

Setting / area	What to explain
Enable switch	Turns commission capture and calculation on. Merchants can configure first and enable later.
Website order policy	Choose whether unattributed website orders earn nothing, go to a house account, or wait for manual attribution.
Register attribution	Optionally credit the cashier when a register sale has no named salesperson.
Service & Repair	Enable repair commission independently; it is unavailable when Service & Repair is not installed.
Dashboard	Shows active people, published plans, open periods, exceptions, calculated commission, and recent calculation runs.

3. Participants, roles, locations, and assignments

A participant record holds a person's name, employee code, linked login, and note. The same person may earn separately as a salesperson, technician, and inspector.

- Use house accounts for unattributed website business when reporting still needs to balance.
- Start and end dates control when a person can earn without deleting their history.
- Assign people to one or more stores with effective dates. Sales at a store where they do not work are flagged for attention.
- Record manager relationships and optionally grant participants access to their own statements only.
- Plan assignments specify the plan, kind of work, optional store, and date range. A person can use different plans for sales and repair work.
- Once an assignment has been used in payroll, end it instead of deleting it so prior calculations remain reproducible.

4. Compensation plans and rate precedence

Plans are versioned. Publishing locks a version so past payroll can always be re-proved. For a future change, clone the current version, edit the draft, compare it with the prior version, and publish the new version.

- Publishing a new version automatically ends the previous version the day before and warns about periods that would be left without a valid version.
- Validation rejects conflicting or impossible rules, including duplicate product rules, competing category rules, and references to missing products or categories.
- The rate summary provides a read-only review of what a plan pays.
- The simulator can show what a product and amount would pay at a given progress point and identify the rule behind the result.

Rate precedence: the broadest rule starts at the plan default, then category, then individual product. Location and sales channel can make a rule more specific at each level; the more specific matching rule wins.

Rate capability	Behavior
Payment methods	Percentage of sale; flat amount per unit, line, order, or billed hour.
Exclusions	A plan default, channel, category, or product can earn nothing.
Channel rates	Different rates can apply at register, website, or quoted business.
Location rates	Rates can differ by store, including category/product rules within a store.
Value limits	Lines below or above configured values can be skipped.
Quoted business	The quote attribution/rate follows the business when it is later settled.

5. Spiffs and short-term incentives

Spiffs are time-boxed incentives independent of the normal compensation plan. They can target a product, category, or vendor, optionally at a single store.

- Pay a fixed amount per unit or a percentage of the line.
- Cap by units or dollars; the final qualifying sale is limited to the remaining budget.
- A spiff normally stacks on top of normal commission, but can replace normal commission for the line. The sale still counts toward quota.
- Pay the people who made the sale or a named specialist.
- Mark vendor-funded spiffs so the module can total vendor receivables by period.
- A retroactive spiff can trigger background recalculation of affected open periods.
- Spiffs can pay even when the normal plan excludes the product or the line is outside plan value limits.

6. Quotas and accelerators

Quotas can be monthly, quarterly, or custom. They measure net revenue, billed labour hours, or completed jobs.

- Targets can be set per person, inherited from a plan default, overridden per assignment, or tracked separately per store.
- Bulk tools can set targets for many people or import targets from a spreadsheet with per-row results.
- Draft targets do not affect pay until approved.

- Accelerator tiers multiply commission only on the portion above quota. A single transaction can therefore contain both normal-rate and accelerated-rate portions.
- Statement lines retain before-and-after attainment so the applied tier can be explained.

7. Service & Repair commission

When Service & Repair is available, the salesperson who wrote up the job, the technician who performed the work, and the inspector who signed it off can each earn independently.

- Repair commission is earned when the work order is closed and fully paid, not when it is booked.
- Warranty work waits for the warranty reimbursement before earning.
- Technician shares can be derived from labour-log hours.
- A plan can optionally pay technicians on fitted parts as well as labour.
- Rates can differ by labour, parts, flat-rate jobs, fees, and discounts, or exclude a line type.
- Repair money settled at the register is recognized as repair money and is not also paid as a retail sale.

8. Attribution: who gets the credit

Attribution determines which participant receives commission credit.

Source	Rule
POS sale	Named salespeople carry through, including split sales.
Quote	Everyone named on the quote is credited when it converts, shared evenly.
No named seller	Configured fallbacks may credit the cashier or a house account.
Manual correction	Reassign with a reason; original figures are reversed and the sale recalculated.
Invalid split	A split that does not total 100% is refused and raised for attention.
Approved history	Do not rewrite attribution in approved payroll; correction is handled through an adjustment in the current period.

9. Running a commission period

Periods are the payroll workflow. Create one period or generate monthly/quarterly periods for a year; overlapping periods are refused.

Step	Support guidance
Calculate	Produces itemized statements for every participant with sale, rate, multiplier, and rule. Recalculate while open.
Adjust	Add a one-off amount with a reason and optional quota effect; removable while open and audited.
Approve	The system checks for changes since calculation. If figures are stale, approval is refused until recalculated.
Lock	Approval freezes the period and cannot occur before the period has ended.
Unlock	An administrator can unlock an approved but unpaid period; the reversal is recorded.
Mark paid	Records that money has gone out and closes the period permanently.
Export	Creates a payroll-ready spreadsheet tied to the run number, status, and production time.

10. Reports and statements

Reports export to spreadsheets with the active screen filters.

- Period liability & performance: base commission, accelerators, adjustments, clawbacks, participant liability, quota attainment, source/channel performance, and quote pipeline.
- Attainment & trend: quota versus actual across the last six periods, ordered as a leaderboard.
- Commission cost: commission as a percentage of the revenue that earned it, by category, store, and channel.
- Attribution hygiene: shows how credit was declared, fell back to cashier, went to a house account, or was manually corrected.
- Participant statement: one person and one period, line by line, with reasoning.
- My statements: a participant's own statement history only.
- Vendor-funded spiff receivables appear on the Spiffs screen rather than the main report list.

11. Accuracy, reversals, and self-correction

The module preserves earning facts instead of editing them. Refunds, voids, and exchanges create matching reversal records linked to the original.

- Partial refunds claw back only the corresponding share, including the appropriate share of a flat per-order fee.
- Unique record keys prevent retries or catch-up jobs from paying the same event twice.
- Items needing attention include unattributed sales, people without plans, invalid store participation, invalid splits, and late arrivals after payroll close.
- The nightly catch-up re-checks recent orders, repairs, and refunds and can also be run on demand.
- Backdated rate changes or spiffs can re-run affected open periods and report the financial effect.
- Events arriving after a period is closed are queued for a documented adjustment in the next open period.

12. Access, privacy, and audit

Role	Access described by the module
Administrator	Full control, including unlocking an approved period.
Manager	Plans, people, attribution, and reports.
Payroll	Periods, adjustments, approval, payment, and exports.
Participant	Own statements only.

Attribution changes, adjustments, deletions, approvals, and unlocks are audited with the user and time. Participants can view/export their own statements but cannot view another participant's statement.

13. Integrations and event timing

System	Commission behavior
Orders / website	Website and admin orders earn when the order reaches its completed status.
Point of Sale	Captures sales, exchanges, refunds, voids, and named salespeople from the sale or originating quote.
Payments	Refunds create matching clawbacks automatically.
Service & Repair	Supports work orders, repair payments/refunds, and warranty reimbursements; optional integration.
Product catalogue	Product records can carry per-product commission rates.
Multi-store	Supports per-store participation, assignments, rates, spiffs, quotas, accelerators, enablement, and reporting.

14. Troubleshooting playbook

Merchant symptom	What to check first
"Nobody is earning commission"	Confirm the module is enabled, the participant is active for the date/location, a published plan is assigned, and the earning event has reached the required status.
"Website orders have no salesperson"	Check the website order policy: no commission, house account, or manual attribution queue.
"This store sale is flagged"	Verify the participant is assigned to that location for the sale date.
"The rate looks wrong"	Check the effective plan version, then specificity: product > category > plan default, plus location/channel-specific matches. Review spiffs and accelerator attainment.
"Approval is blocked"	The calculation may be stale because something affecting pay changed. Recalculate and review the reported change before approving.
"A refund changed the statement"	Explain that the original earning remains and a linked clawback/reversal is added.
"A closed month needs correction"	Do not rewrite approved history. Use the documented adjustment path in the current/open period; only administrators can unlock an approved unpaid period.
"A sale was missed"	Check Items needing attention and the catch-up process. Commission capture failure should not block the underlying sale.

15. AI agent guardrails

Use these rules when answering merchant questions about Sales Commissions:

- Do not invent a rate, participant assignment, quota, spiff, payroll amount, or period status. Ask for the relevant merchant data when it is not provided.
- Explain calculations using the documented precedence and the plan/version effective for the earning date.
- Treat published plan versions and approved payroll as historical records. Do not recommend deleting or rewriting evidence used by prior payroll.
- For refunds and corrections, explain reversals and adjustments rather than suggesting edits to original earning records.
- Respect role boundaries. A participant should only be guided to their own statements; administrator-only actions such as unlocking should be identified as such.

- Escalate suspected data corruption, duplicate/missing historical records that catch-up does not resolve, or requests that require direct database repair.

16. Fast diagnostic checklist

Question	Why it matters
Is Sales Commissions enabled?	Capture and calculation do not run while disabled.
Who is the participant and what role earned?	Sales, technician, and inspector roles can earn independently.
What store and date?	Participation and assignments are effective-dated and can be store-specific.
Which plan version was effective?	Published versions preserve the rates used for historical calculation.
What product/category/channel/location rule matched?	The most specific applicable rule wins.
Was a spiff active?	Spiffs can stack or replace normal commission and can pay excluded items.
What was quota attainment before/after?	Accelerators apply only to the portion above the threshold.
What event status was reached?	Orders and repairs earn at documented completion/settlement points.
Is the period open, approved, or paid?	Available corrections differ by payroll state.
Is there an exception or late arrival?	Items needing attention and catch-up/adjustment workflows preserve accuracy.