indition™

INDITION COMMERCE

Sales Commissions

Setup Guide — from switched off to paying your first month

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Setting up Sales Commissions

Six steps, in order. Each one unlocks the next, and the dashboard tracks your progress through them — it tells you what is still missing and stops prompting once you are ready to run a month.

The whole thing at a glance

1. Turn it on and choose your attribution rules
2. Add your people
3. Write and publish a plan
4. Put people on the plan
5. Set quotas (only if you pay above-target bonuses)
6. Create your periods and do a dry run

> **Do the dry run.** Step 6 calculates a past month without approving it. It is the cheapest way to find a rate you have entered wrong, and nothing is committed until you approve.

Step 1 — Turn it on

Commissions → Settings

1. Switch on **Enable commission tracking and reporting**. Until this is on, nothing is recorded.
2. Decide what happens to a **register sale with no salesperson named**. Crediting the signed-in cashier is the usual choice — it only applies when they are set up as a salesperson.
3. Decide what happens to a **website order nobody sold**. Three options, and this one is worth a moment's thought:
   - *Don't earn commission* — the default, and right for most shops. Unassisted web orders simply do not pay.
   - *Credit a house account* — pool them against a non-person record, for a team bonus or an online department.
   - *Queue for manual attribution* — every one waits for a human. Only choose this if somebody genuinely reviews them.
4. Leave **Service & Repair commissions** on if you pay for repair work. It switches itself off if Service & Repair is not available on your site.
5. Leave the **reconciliation lookback** at 45 days unless you have a reason to change it.

> A website order that somebody actually sold — an assisted quote, a manual correction — always earns, whatever this policy says. The policy only governs orders with nobody attached.

Step 2 — Add your people

Commissions → Salespeople & Technicians

1. Press **Import from POS & repair staff**. Everyone who has rung up a sale becomes a salesperson; everyone recorded as a repair technician becomes a technician.

2. Open each one and check the roles are right. The import is a starting point, not a verdict — somebody may be both.
3. Set **locations** for anyone who works a specific store, and an **active from** date for anyone who did not start at the beginning of time.
4. Tick **can view own statements** for anyone who should see their own figures.
5. If you chose the house-account policy in step 1, create the house record now: a name like "Online", ticked as a **house account**, no login.

> Re-run the import whenever you hire. People who already have a record are skipped, so it is always safe.

Step 3 — Write and publish a plan

Commissions → Compensation Plans → Create

1. Name the plan and set the currency.
2. Switch on what it pays for — store and website sales, service and repair, or both.
3. Set the **default rate**. Start here even if you plan exceptions; everything else is measured against it.
4. Add exceptions only where you actually need them — a channel rate, a category rate, a product override, an exclusion.
5. Set **value limits** if you do not pay on very small or very large lines.
6. For repair: set a rate for each role you pay, and per line type if parts and labour differ. Decide the **technicians also earn on parts** switch — off is the normal arrangement.
7. Press **Validate & publish**.

> **Publishing is final for that version.** You cannot edit a published plan — that is what makes past payroll provable. To change rates later, clone it as a new draft and publish that. The old version closes off automatically the day before the new one starts.

> Before publishing, open **Diagnostics & simulator**, enter a real product and a realistic amount, and check the payout is what you expect. It shows which rule supplied each number.

Step 4 — Put people on the plan

Nobody earns until they are assigned. On each person's record, add an assignment: the plan, the kind of work, the role, an optional store, and the start date.

Somebody who sells *and* works the bench needs two assignments — one for selling, one for performing. They can be on different plans.

Step 5 — Set quotas

Skip this entirely unless you pay a bonus above target. Without accelerator tiers on the plan, a quota changes nobody's pay — it only feeds the attainment report.

1. On the plan, choose the quota period and what it measures, and set a default target.
2. Set individual targets on each person's record, or use **Bulk quota assignment** for a group, or **Import quota CSV** for a whole year.
3. Only **approved** targets count. Prepare next year as drafts if you like.
4. Add the accelerator tiers to the plan — they must start at 0%, join up with no gaps, and the top tier is left open-ended.

Step 6 — Periods and a dry run

Commissions → Periods & Statements

1. **Generate** a year of periods, monthly or quarterly, matching what you set on the plan.
2. Pick a **month that has already finished** and press **Calculate**. Nothing is committed by calculating.
3. Read a few statements. Do the figures match what you would have paid by hand?
4. Open **Exceptions** and work through anything waiting — most first runs surface a few sales with nobody attached.
5. Fix whatever is wrong, recalculate, and repeat until it is right.
6. When you are satisfied, run your first real month: calculate, approve, export, mark paid.

> **Approval is deliberately strict.** If anything affecting the numbers arrives between calculating and approving, approval is refused and tells you what changed. Recalculate and approve again — it is stopping you approving figures that are already stale.

Once you are live

How often	What to do
Weekly	Clear the Exceptions queue. It is much easier at ten items than at two hundred.
Monthly	Calculate, review, approve, export, mark paid.
Monthly	Glance at **Attribution hygiene**. A rising cashier-fallback share means salespeople are not being recorded at the till — a training issue, not a software one.
When rates change	Clone the plan, edit, publish with the effective date.
When someone joins or leaves	Re-run the staff import, or set an active-through date.

If something is not working

Symptom	Look at
Nothing is being recorded at all	The master switch in Settings, then the dashboard checklist.

A person earns nothing	Are they assigned to a *published* plan, and is the assignment's date range right?
A sale is missing	Exceptions first. Otherwise the order may not be completed, or the repair not closed and fully paid.
A rate is not applying	**Rate configuration** lists what the plan actually pays with real names. Remember the most specific rule wins.
Approval keeps being refused	Something arrived after your last calculation. Recalculate first.