INDITION COMMERCE

Sales Commissions

User Manual — paying your salespeople and technicians for the business they bring in

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Contents

1. How commission works here

Four things happen, in this order, and understanding them makes every screen in the module obvious.

1. **Something is sold.** A sale at the register, an order on the website, a repair collected from the bench.
2. **Credit is recorded.** Who earned it, and in what share. Usually decided automatically from the sale itself; you can correct it by hand.
3. **The month is worked out.** At period end, the plan in force on each day is applied to the credit recorded, producing a statement per person.
4. **It is approved and paid.** Approval freezes the figures so they can be proved later.

> **Nothing is ever overwritten.** A refund does not edit the original sale — it adds a matching negative entry beside it. That is why a statement from eight months ago can still be reproduced line for line, and why you will sometimes see a sale and its clawback on two different statements.

The three roles a person can earn in

The same person can hold more than one, and each earns independently — paying a technician never reduces the salesperson.

Role	Earns on
Sold by	The sale itself, at the register, on the website, or written up as a repair.
Performed by	Repair work carried out — labour and flat-rate jobs, and parts if your plan says so.
Inspected by	Repair work signed off, where you pay for that separately.

2. Your people

Commissions → Salespeople & Technicians

Adding everyone at once

Rather than typing names in, use **Import from POS & repair staff**. Everyone who has rung up a sale is added as a salesperson; everyone recorded as a repair technician is added as a technician. It is safe to press again after you hire someone — people who already have a record are left alone.

What each record holds

Field	What it does
Linked login	Ties the record to the person's admin account. This is how a sale they ring up finds them.
Roles	Salesperson, technician, inspector, house account — tick whichever apply.
Active from / through	Somebody who joins mid-month earns only from their start date. Set a through date when they leave rather than deleting them — their history stays intact and provable.
Locations	Which stores they work. A sale at a store they are not set up for is flagged rather than quietly paid.
Can view own statements	Lets them open **My Statements** and see their own figures — and only their own.

> **Switching a store off entirely. Commissions → Location Rules** lists every store that earns. Switch one off and it stops paying — sales there are still recorded, so switching it back on pays them from the next calculation and nothing is lost. The same screen shows how many rates, spiffs, quotas and bonus tiers each store has of its own.

> **House accounts.** Tick *House account* on a non-person record ("Online", say) if you want website business that nobody sold to be pooled somewhere rather than ignored. You choose that behaviour in Settings.

Putting someone on a plan

A person earns nothing until they are assigned to a plan. On their record, add an assignment: the plan, what kind of work it covers, which role, an optional single store, and the dates it runs.

> **Assign only published plans.** A draft plan pays nothing. The picker only offers published ones for exactly this reason.

To correct a mistake, use **End** rather than Delete. Ending stops future earning and leaves history alone; delete is refused outright once anything references it.

3. Writing a compensation plan

Commissions → Compensation Plans

A plan is a series of dated versions. You edit a draft; publishing locks it so the rates that paid a past month can always be re-proved. To change rates later you clone the current version, edit the copy, and publish that.

Building it up

1. **Name it** and choose the currency.
2. **Turn on what it pays for** — store and website sales, service and repair, or both. The screen only shows the sections you switch on.
3. **Set the default rate.** The one number that pays every sale. Everything below it is an exception.
4. **Add exceptions** as needed: by sales channel, by category, by individual product.
5. **Set quotas and accelerators** if you pay a bonus above target.
6. **Validate & publish.**

The five ways a rate can pay

Method	Use it when
A percentage of the sale	The normal case. Enter `5` for 5%.
A flat amount per unit	A fixed sum for each item sold.
A flat amount per line	A fixed sum per line on the order, whatever the quantity.
A flat amount per order	A fixed sum for the whole sale, paid once.
A flat amount per billed hour	Repair labour only.

Any of them can instead be set to **Nothing — excluded**, at any level.

Which rate wins

Broadest first, most specific wins: **default → category → individual product**. So a product override beats its category.

Location and sales channel cut across all of that. At every level, a rate set for this store beats the one that is not, and a rate set for both the store and the channel beats either alone. That is what lets you say “the downtown shop pays 12% on sewing machines” without touching what any other shop pays.

> **Quoted orders** pay the quoted rate wherever the customer settles — at the register or through a payment link. The quote is what made the sale happen.

Value limits

Skip lines under a set amount, over a set amount, or both. A skipped line earns nothing at all: no commission and no quota credit.

Rates by location

Pay a different rate at one store. Add it under **Rate by location** and everything sold there takes that rate instead of the default. Category rates and product overrides can be set per store too.

> **A location is not the same thing as an online store.** Two shops can share one online catalogue and still be separate locations with separate rates — the rate follows the shop the sale happened in.

Repair work uses the location the work was done at, so a service centre can pay differently from the shop floor.

Repair rates

Set a rate per role, and optionally per line type — labour, parts, flat-rate jobs, fees, discounts — so parts can pay differently from labour or not at all. **Technicians also earn on parts** is a single switch, off by default.

Before you publish

Publishing runs a check and refuses anything that could never work: two rules fighting over the same product, a category rate with no rate on it, a rate limited to a sales channel on repair work, or a rate pointing at a product that no longer exists. Each refusal says what to fix.

> Use **Diagnostics & simulator** to enter a product and an amount and see exactly what the plan would pay — and which rule supplied each number — before anyone is paid by it.

4. Quotas and accelerators

A quota is what someone is expected to bring in over a period. On its own it drives reporting. Paired with accelerator tiers, it changes pay.

Setting targets

Choose the period (monthly, quarterly, or periods you create yourself) and what it measures — net revenue, billed labour hours, or completed jobs. Set a default on the plan for anyone without a personal target, then set individual targets on each person's record. Only **approved** targets affect anything; drafts are ignored, so next year's numbers can be prepared in advance.

A target can also be set **for one store**, where somebody is expected to do different numbers at different shops. Their progress toward it is then counted separately at that store — one running total cannot be measured against two different targets.

Use **Bulk quota assignment** to set the same target across many people, or **Import quota CSV** for a whole year at once. The import reports its result row by row.

Accelerators

Tiers pay a multiplier *above* quota — and only on the part above it.

> **Worked example.** Quota $1,000, with a 1.5× tier above 100%. A salesperson already at $900 rings up a $400 sale. The first $100 finishes their quota and pays the normal rate; the remaining $300 pays 1.5×. One sale, split across two tiers, and the statement shows both parts.

Tiers must start at 0% and join up with no gaps, and the top tier is left open-ended.

5. Spiffs

Commissions → Spiffs

A spiff is a short-term incentive on one product, a whole category, or everything from one vendor. It runs between two dates and stops on its own.

Setting	What it does
Amount	A fixed sum per unit sold, or a percentage of the line.
Caps	Stop after so many units or so many dollars, for the whole run. The remaining budget is shown against each spiff, and the last qualifying sale is paid only up to what is left.
Stacking	On — pays on top of the usual commission. Off — pays instead of it for that line.
Who earns it	The people who made the sale, or one named person, for a specialist supporting a colleague's sale.
Where it runs	Every store, or one store only — for clearing local overstock without paying for it everywhere. Online sales have no store, so a spiff pinned to one never pays on them.
Funded by	Mark it vendor-funded and the module totals what each vendor owes, by period.

> **A spiff is deliberately independent of the plan.** It pays even on a product the plan excludes, and even on a line outside the plan's value limits. That is what makes it usable for shifting stock you do not otherwise pay commission on. If you want something excluded from everything, do not put a spiff on it.

> A **non-stacking** spiff replaces the commission on that line, but the sale still counts in full toward quota and accelerator progress. On the statement it shows as a line with quota credit and no commission of its own, marked *spiff replaced the rate*.

Setting up a spiff whose dates have already started re-works the affected open periods automatically in the background.

6. Who gets the credit

Most of the time this is decided for you.

Where the sale came from	Who is credited
Register, salesperson named	The people named, in the shares recorded on the sale.
From a quote	Everyone named on the quote, shared evenly between them.
Register, nobody named	The cashier, if you have that switched on and they are set up as a salesperson. Otherwise it is flagged for you.
Website, nobody named	Whatever you chose in Settings: nothing, the house account, or flagged for review.
Repair	Whoever wrote it up, whoever worked on it (from the labour logged), and whoever signed it off.

Correcting it

Commissions → Source Attribution. Load the order or repair by its reference number. The screen shows what you are correcting — when, how much, which channel, which customer — then the people credited.

1. Change or add people. **Add another person** puts a new row on.
2. Set each share. The running total per role is shown as you type; each role must reach 100% on its own.
3. Give a reason and save.

The original figures are reversed and the sale re-worked, so the history shows both what was paid and what it was corrected to.

> **Once payroll is approved, credit is frozen.** The screen will tell you, and the fix is an adjustment in the current period instead.

7. Running a commission month

Commissions → Periods & Statements

1. **Create the periods.** One at a time, or generate a whole year of monthly or quarterly periods at once.
2. **Calculate.** Produces a statement per person, itemised by sale, with the rate and rule behind each line. Recalculate as often as you like.
3. **Add any adjustments.** A one-off amount for a person with a reason, and optionally an effect on their quota.
4. **Approve & lock.** Freezes the figures.
5. **Export for payroll.**
6. **Mark as paid** once the money has gone out.

> **If approval is refused,** something that affects the numbers arrived after you calculated — a late sale, a refund, an adjustment. The message says what changed and when. Recalculate and approve again. This is the system refusing to let you approve figures that are already out of date.

> A period cannot be approved before it has finished, so a sale completing on the last afternoon can never become unpayable. If you approve by mistake, an administrator can unlock it as long as it has not been marked paid.

The payroll export carries the run number, the run status and the time it was produced, so the file in your finance folder can always be matched back to the run that made it.

8. Reports

Every report exports to a spreadsheet, carrying whatever filters are on screen.

Report	Answers
Period liability & performance	What this period owes, split into base commission, accelerators, adjustments and clawbacks — filtered by person, store, channel, category, product and more.
Attainment & trend	Who is hitting quota, across the last six periods, ordered as a leaderboard.
Commission cost	What commission actually costs as a percentage of the revenue that earned it, by category, store and channel.
Attribution hygiene	Whether salespeople are being recorded properly at the point of sale. A rising cashier-fallback share is the warning sign.
Participant statement	One person, one period, line by line.
My statements	A salesperson's own history, visible to them alone.

9. Things that need attention

Commissions → Exceptions is the one list of everything waiting on a decision.

The chips across the top show each kind with a live count — click one to see only those. Every row tells you when the sale happened, what it was worth, the channel, the customer, and what to do about it, and links straight to the screen where it is fixed.

What you see	What it means
Unattributed order / repair	Nobody is credited. Open it and name the salesperson.
Missing plan assignment	Someone earned but is not on a plan. Assign them one and recalculate.
Missing participant	The person named on the sale has no commission record.
Participant location mismatch	They are not set up to work at the store the sale happened in.
Invalid split	The shares do not add up to 100%.
Late fact, closed period	Arrived after its period was approved. Add an adjustment in the current period.
Recalculation requested	A backdated change queued a period to be re-worked. Handled automatically.

> **Clearing a backlog.** Filter to one kind, then use **Resolve all**. It states the exact number it will clear and records your note against every one. Useful after a settings change makes a whole class of item moot.

10. Everyday questions

Someone says their commission is wrong

Open their statement for the period. Every line shows the sale, the rate used and the multiplier applied. Compare against the plan on **Rate configuration**, which lists what the plan pays with real product and category names.

A sale is missing entirely

Check Exceptions first — it is most likely sitting there unattributed. If not, the order may not have reached its completed status, or the repair may not be closed and fully paid yet. Neither earns until then.

We changed a rate mid-month

Publish the new version with the date it takes effect. The old version is closed off the day before automatically, and each sale is paid at the rate in force on its own day.

Someone left

Set their *active through* date. They stop earning from then, keep every statement they have already earned, and stay available on past reports.

A refund from a previous period

It comes off the period you are paying now, which is the only period you can still change. If the sale had earned a spiff, the clawback is valued at what that spiff was worth on the day of the original sale.

Nothing is being recorded at all

Check **Settings** — commission tracking has a master switch. Below it, the dashboard checklist shows what else is still missing before anyone can be paid.