



Commission Setup and Reports

Commission Setup and Reports



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Customer Success Manager, RealGreen

Agenda

- Commission Explanation
- Commission Setup
- Commission Reports
- Making Corrections

SA5 Commission: Explanation

SA5 Commission: Explanation

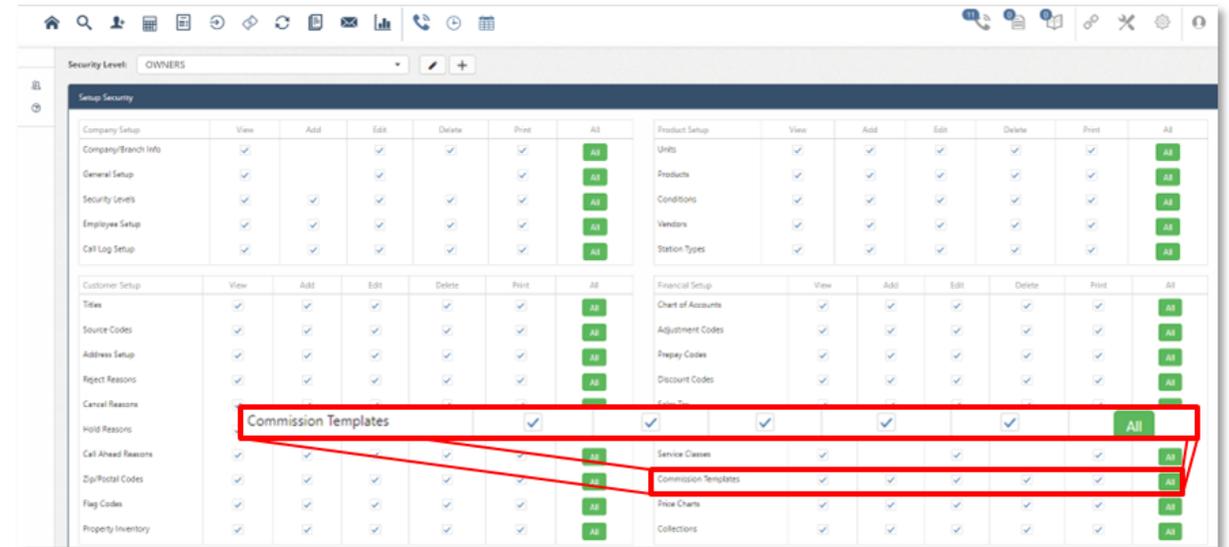
What do the commission templates offer?

- A more robust commission reporting tool than previous options
- Easily calculate varying commission at a per service level
 - Does NOT calculate a stepped commission scale
- Set up first year sales, perpetual sales, and/or production commission
- Created as a parameter and assigned at the employee level

SA5 Commission: Enable Template Setup

If you've never used the commission templates, they may need to be enabled under the security settings:

- Settings > Company Setup > Security Level Setup > Setup Security Menu
 - Enable View, Add, Edit, Delete, Print as necessary



SA5 Commission: Enable Reports

If you've never used the commission reports, they may need to be enabled under the security settings:

- Settings > Company Setup > Security Level Setup > Report Security Menu
 - Enable Run, Internal, Letter, Utility, External as needed

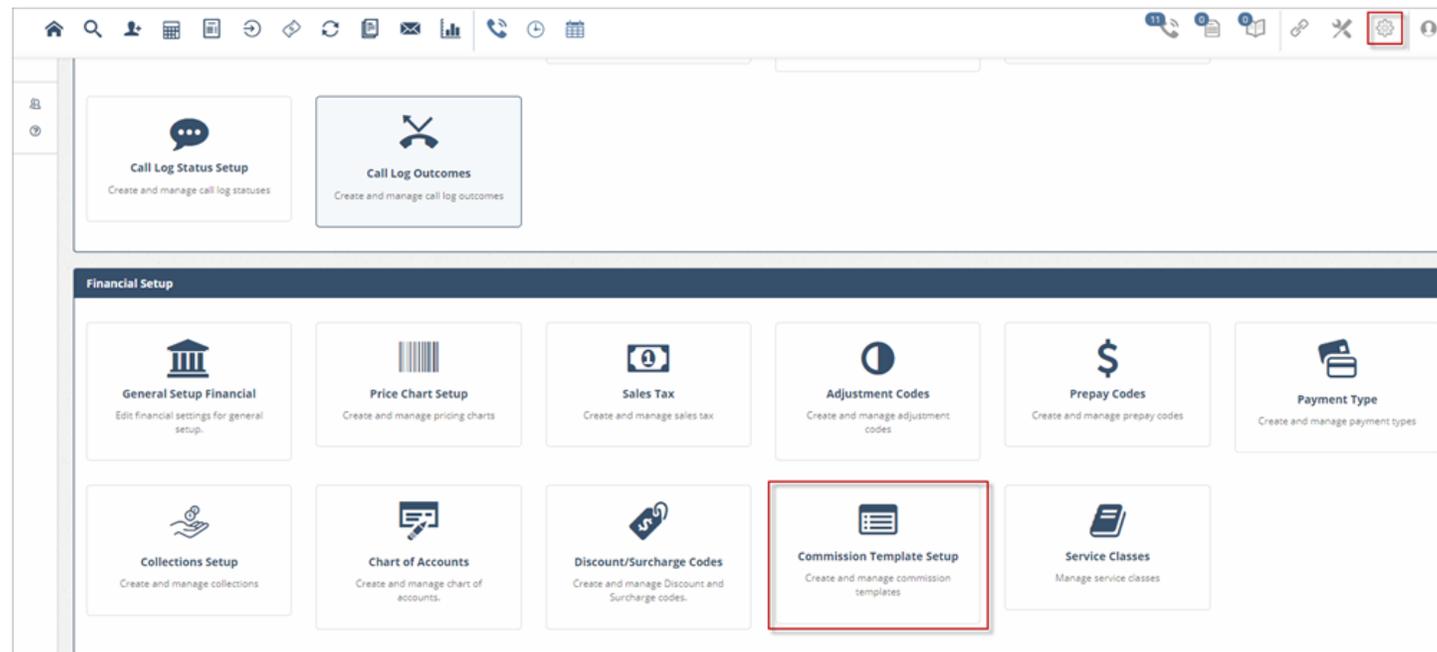
Report Name	Run	Internal	Letter	Utility	External	AB
Customer Reports	<input checked="" type="checkbox"/>					
History Reports	<input checked="" type="checkbox"/>					
Service Reports	<input checked="" type="checkbox"/>					
Program Reports	<input checked="" type="checkbox"/>					
Sales Reports	<input checked="" type="checkbox"/>					
Sales Report	<input checked="" type="checkbox"/>					
Production By Salesperson	<input checked="" type="checkbox"/>					
Customer Growth Analysis	<input checked="" type="checkbox"/>					
Sales Commission	<input checked="" type="checkbox"/>					
Customer Reports	<input checked="" type="checkbox"/>					
Customer List	<input checked="" type="checkbox"/>					
Customer List by Program/Job	<input checked="" type="checkbox"/>					
Customer Source Report	<input checked="" type="checkbox"/>					
Service By Source Report	<input checked="" type="checkbox"/>					
Customer List Source Report	<input checked="" type="checkbox"/>					
Sales Commission	<input checked="" type="checkbox"/>					
Man Hour Budgeting Report	<input checked="" type="checkbox"/>					
Season Summary By Service	<input checked="" type="checkbox"/>					
Season Summary by Round/Cycle	<input checked="" type="checkbox"/>					
Weekly Productivity Report	<input checked="" type="checkbox"/>					
Discount/Pricing Summary	<input checked="" type="checkbox"/>					
Net Billing YTD Report	<input checked="" type="checkbox"/>					
Weekly Business Summary	<input checked="" type="checkbox"/>					
Weekly Budgeting Summary	<input checked="" type="checkbox"/>					
Product Usage Season Summary	<input checked="" type="checkbox"/>					
Route Performance Summary	<input checked="" type="checkbox"/>					
Weekly Evaluation Business Summary	<input checked="" type="checkbox"/>					
Revenue Availability Report	<input checked="" type="checkbox"/>					
Customer Route Report	<input checked="" type="checkbox"/>					
Customer Flag Report	<input checked="" type="checkbox"/>					
Collection Status Report	<input checked="" type="checkbox"/>					
Customer List by Program Status...	<input checked="" type="checkbox"/>					
Customer/Program Status Comp	<input checked="" type="checkbox"/>					
Marketing Summary	<input checked="" type="checkbox"/>					
Association/Price Report	<input checked="" type="checkbox"/>					
Sales Estimate Book	<input checked="" type="checkbox"/>					
Unrecorded Customer List Report	<input checked="" type="checkbox"/>					
Installation Customer Audit Report	<input checked="" type="checkbox"/>					
Price Discrepancy Report	<input checked="" type="checkbox"/>					
Property Inventory	<input checked="" type="checkbox"/>					

SA5 Commission: Setup

SA5 Commission: Creating/Editing Templates

Templates first need to be created before they can be assigned.

- Settings > Financial Setup > Commission Template Setup



SA5 Commission: Creating/Editing Templates

1. Template Description
2. Template Creation Buttons
3. Service/Commission Grid

Template Name: Example Template

Commission Template

English Description: Example Template

French Description: Exemple de modele **1**

Spanish Description: Ejemplo de plantilla

2 [+] [Refresh] [-]

Service	Residential	Commercial	First Year Paid	First Year Net	First Year Sale \$	First Year Sale %	Perpetual Sale Paid	Perpetual Sale N
AAA - Aeration Service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sold Date-Skips Not Paid	<input type="checkbox"/>	5	2	None	<input type="checkbox"/>
AC - ACCLAIM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Done Date-Skips Not Paid	<input type="checkbox"/>	5	2	None	<input type="checkbox"/>
BA - BAYLETON	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	0	2	None	<input type="checkbox"/>
CA - CORE AERATION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	0	2	None	<input type="checkbox"/>
CD - Christmas Decorations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>
CL - CLEARYS 3336g	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input type="checkbox"/> 3	0	0	None	<input type="checkbox"/>
COR - Core Aeration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>
DB - DURSBAN INSECTICIDE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>
DC - Daconil fungicide	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>
DR - TREE & SHRUB FEEDING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>
DS - DURSBAN (SURFACE FEEDERS)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>
DV - GRUB CONTROL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>

SA5 Commission: Creating/Editing Templates

The template description will be the name of the drop-down option that appears in the Employee Setup parameters.

- English, French, and Spanish descriptions can be used in multi-lingual offices
- Service Assistant does not perform the translations automatically

Commission Template		
English Description	French Description	Spanish Description
<input type="text" value="Sales Commission"/>	<input type="text"/>	<input type="text"/>

SA5 Commission: Creating/Editing Templates

Create a new template based on the currently selected template

Add all available services based on residential and/or commercial sales/production

Paste current copied settings to all residential and/or commercial services

Add a new line for individual service selection

Delete the currently selected service (deleted services are non-recoverable)

Template Name: New Template

Commission Template

English Description: New Template

French Description:

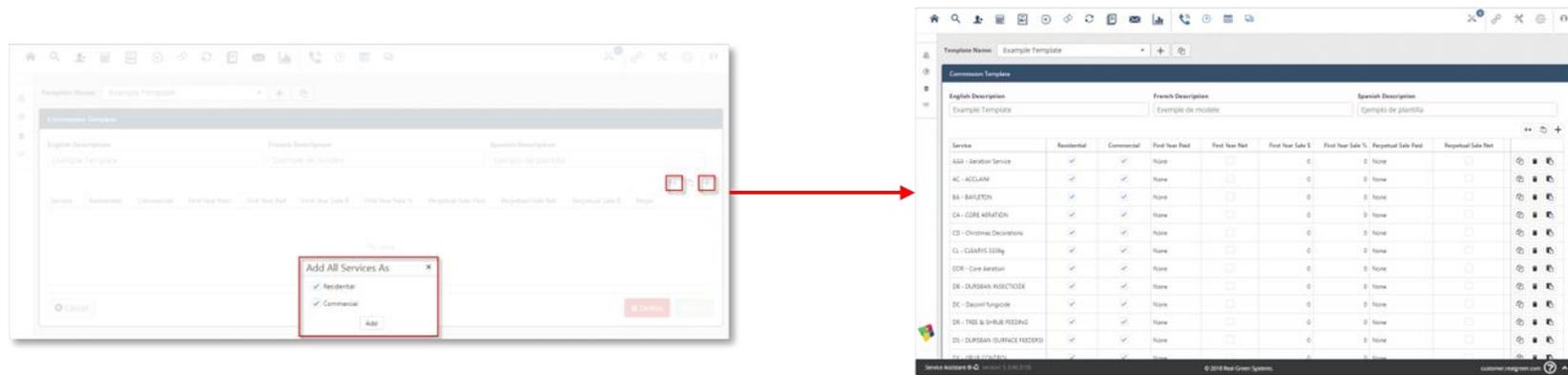
Spanish Description:

Service	Residential	Commercial	First Year Paid	First Year Net	First Year Sale \$	First Year Sale %	Perpetual Sale Paid	Perpetual Sale Net	Perpetual Sale \$	Perpetual Sale %	Production Paid	Production Net	Production \$
SC - Service Call Visit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sold Date-Skips Not Paid	<input checked="" type="checkbox"/>	0	6	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>	0

SA5 Commission: Creating/Editing Templates

Services can be added individually using the icon on the right, or all at once using the icons to the left.

- Residential: adds all services with the Residential checkbox selected (pays commission towards services on residential customers only)
- Commercial: adds all services with the Commercial checkbox selected (pays commission towards services on commercial customers only)
- Res. & Comm.: adds all services with both Residential and Commercial checkboxes selected (pays the same commission towards services on both residential and commercial customers)



SA5 Commission: Creating/Editing Templates

Service codes can be selected via the drop-down menu:

- Each service code can be used up to twice (based on the Residential/Commercial setting at the customer level)
- Once for residential sales/production AND/OR once for commercial sales/production
 - For those that pay different commission rates towards residential and commercial sales/production
- Once for BOTH residential and commercial sales/production
 - For those that pay the same commission rates towards residential and commercial sales/production

Service	Residential	Commercial	First Year Paid	First Year Net	First Year Sale \$	First Year Sale %	Perpetual Sale Paid	Perpetual Sale Net	Perpetual Sale \$	Perpetual Sale %	Production Paid	Production Net	Production \$	
SC - Service Call Visit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sold Date-Skips Not Paid	<input checked="" type="checkbox"/>	0	6	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>	0	  

SA5 Commission: Creating/Editing Templates

Services are considered to be 'first year sales' when they contain a unique sold date (i.e. a renewed service will not be a first year sale, but two of the same services sold in concurrent seasons will both be first year sales).

- 1st Yr. Paid: if commission is paid on the first year that the service is sold
- 1st Yr. Net: base commission on the sales amount after discounts/surcharges are applied
- 1st Yr. Sale \$: a set dollar value commission assigned to service sales (can be added with 1st Yr. Sale %)
- 1st Yr. Sale %: a percentage value commission based on service sales (can be added with 1st Yr. Sale \$)

All sales commission is split 50/50 on services where two salespeople are present.

Service	Residential	Commercial	First Year Paid	First Year Net	First Year Sale \$	First Year Sale %	Perpetual Sale Paid	Perpetual Sale Net	Perpetual Sale \$	Perpetual Sale %	Production Paid	Production Net	Production \$	
SC - Service Call Visit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sold Date-Skips Not Paid	<input checked="" type="checkbox"/>	0	6	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>	0	  

SA5 Commission: Creating/Editing Templates

Commission payout options for first year sales:

- None: no commission is paid for the first year sales on the service
- Sold Date-Skips Not Paid: commission is based on the date sold, skipped services will not be paid
- Sold Date-Skips Paid 1st Year: commission is based on the date sold, skipped services will be included
- Confirm Date-Skips Not paid: commission is based on the date confirmed, skipped services will not be paid
- Confirm Date-Skips Paid 1st Year: commission is based on the date confirmed, skipped services will be included
- Done Date-Skips Not Paid: commission is based on the done date, skipped services will not be paid
- Done Date-Skips Paid 2nd Year: commission is based on the done date, skipped services will be paid on second year done date (i.e. first year the originally skipped service is done)
- Paid Date-Skips Not Paid: commission is based on the service paid date, skipped services will not be paid
- Paid Date-Skips Paid 2nd Year: commission is based on the service paid date, skipped services will be paid on the second year paid date (i.e. the first year the originally skipped service is paid for)

SA5 Commission: Creating/Editing Templates

Services are considered to be 'perpetual' when they contain the same sold date (i.e. a renewed service will be a perpetual sale regardless of the sales person as long as the sold date is the same).

- Perpetual Sale Paid: if commission is paid annually after the first year sale
- Perpetual Sale Net: base commission on the sales amount after discounts/surcharges are applied
- Perpetual Sale \$: a set dollar value commission assigned to service sales (can be added with Perpetual Sale %)
- Perpetual Sale %: a percentage value commission based on service sales (can be added with Perpetual Sale \$)

All sales commission is split 50/50 on services where two salespeople are present.

Service	Residential	Commercial	First Year Paid	First Year Net	First Year Sale \$	First Year Sale %	Perpetual Sale Paid	Perpetual Sale Net	Perpetual Sale \$	Perpetual Sale %	Production Paid	Production Net	Production \$	
SC - Service Call Visit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sold Date-Skips Not Paid	<input checked="" type="checkbox"/>	0	6	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>	0	  

SA5 Commission: Creating/Editing Templates

Commission payout options for perpetual sales:

- None: no commission will be paid on perpetual service sales
- Produced: commission is paid on the done date of the service
- Paid: commission is paid on the paid date of the service (must be done and paid)

Both 1st Year and Perpetual Sales pay commission to the salesperson or salespeople assigned to the program or the individual rounds.

Services renewed as a different service code will be considered a 1st Year Sale in the new season, and NOT a Perpetual Sale.

SA5 Commission: Creating/Editing Templates

Services are considered 'produced' when they are active with a done date.

- Production Paid: if commission is paid to technicians completing services
- Production Net: base commission on the sales amount after discounts/surcharges are applied
 - Production value is not used on the Production Commission Report
- Production \$: a set dollar value commission assigned to service production (can be added with Production %)
- Production %: a percentage value commission based on service production (can be added with Production \$)

All production commission is split based on the % of work listed per crew member entered during production (or listed in History).

Service	Commercial	First Year Paid	First Year Net	First Year Sale \$	First Year Sale %	Perpetual Sale Paid	Perpetual Sale Net	Perpetual Sale \$	Perpetual Sale %	Production Paid	Production Net	Production \$	Production %	
SC - Service Call Visit	<input checked="" type="checkbox"/>	Sold Date-Skips Not Paid	<input checked="" type="checkbox"/>	0	6	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>	0	0	  

SA5 Commission: Creating/Editing Templates

Commission payout options for production:

- None: no commission will be paid on service production
- Produced: commission is paid on the done date of the service
- Paid: commission is paid on the paid date of the service (must be done and paid)

Production pays commission to the technician(s) assigned as the job is completed, or if the technician(s) are added via the History tab.

SA5 Commission: Creating/Editing Templates

One or all the options can be set on each service depending on the needs of the templates, and how commission is offered. Salespeople may earn sales commission and production commission, and technicians may earn production commission and sales commission if both are needed.

- Set the 'Paid' criteria using the drop-down options as needed
- Sales and production commissions can be different values for the same service
- Set dollar amounts, percentages, or both for each service as needed
 - \$100 service with \$5 base rate AND 2% would pay \$7 ($\$5 + (\$100 \times 0.02)$)

Service	Commercial	First Year Paid	First Year Net	First Year Sale \$	First Year Sale %	Perpetual Sale Paid	Perpetual Sale Net	Perpetual Sale \$	Perpetual Sale %	Production Paid	Production Net	Production \$	Production %	
AAA - Aeration Service	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>	0	0	  
AC - ACCLAIM	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>	0	0	None	<input type="checkbox"/>	0	0	  

SA5 Commission: Creating/Editing Templates

Once a template is created and saved, it can be duplicated so quick and easy changes can be made:

- Saves time over creating new templates when only minor changes are needed
- Select the desired template and click the Copy Template button
- Provide a unique name to the new template

Service Assistant > Settings > Commission Template Setup

Template Name: Sales Commission

Commission Template

English Description: Sales Commission 2

French Description

Spanish Description

Service	Residential	Commercial	First Year Paid	First Year Net	First Year Sale \$	First Year Sale %	Perpetual Sale P	
CA - CORE AERATION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
EST - Estimate/Service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
GCP - Grup Control Preventa...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
L01 - EARLY SPRING APPLIC...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
L02 - LATE SPRING APPLICA...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
L03 - EARLY SUMMER SLO...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
L04 - LATE SUMMER SLOW ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
L05 - EARLY FALL FEEDING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
L06 - WINTER DORMANT F...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
LA - LIME	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
LAN - Landscape Job	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
MO - Mowing Service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
SC - SERVICE CALL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
ST - Soil Test	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
T01 - Dormant Oil	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>
T02 - DEEP ROOT FEEDING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Paid Date-Skips Paid 2nd Yr	<input checked="" type="checkbox"/>	0	10	None	<input type="checkbox"/>

You have unsaved changes. Save.

Service Assistant © version: 5.3.156.3592 © 2021 Real Green by WorkWave. Request Technical Support

SA5 Commission: Creating/Editing Templates

Once the template(s) are complete, they can be assigned to employees:

- Assign templates under Settings > Company Settings > Employee Setup
- Edit the desired employee and select the specific Commission Template from the drop-down options

The screenshot displays the 'Employee Setup Detail' page in the Service Assistant application. The page is divided into several sections: Company Information, Address, Wages, Contact Information, Taxes, Employee ID #, Federal Exemptions, Other Deductions, Signature, and Personal Information. A red box highlights the 'Commission Template' dropdown menu, which is currently set to 'New Production Commission'. The dropdown menu is open, showing a list of options: '1', 'New Production Commission', 'New Production Commission 2', 'New Sales Commission', 'Sales 2', 'Sales Commission', 'Sales Template 2', 'Sample', 'TEST', and 'Test2'. The 'New Production Commission' option is selected. The page also includes a navigation bar at the top with 'Service Assistant > Settings > Employee Setup Detail' and a user profile icon 'TB'. The footer contains version information 'Service Assistant version: 5.3.156.3592', copyright '© 2021 Real Green by WorkWave', and a 'Request Technical Support' link.

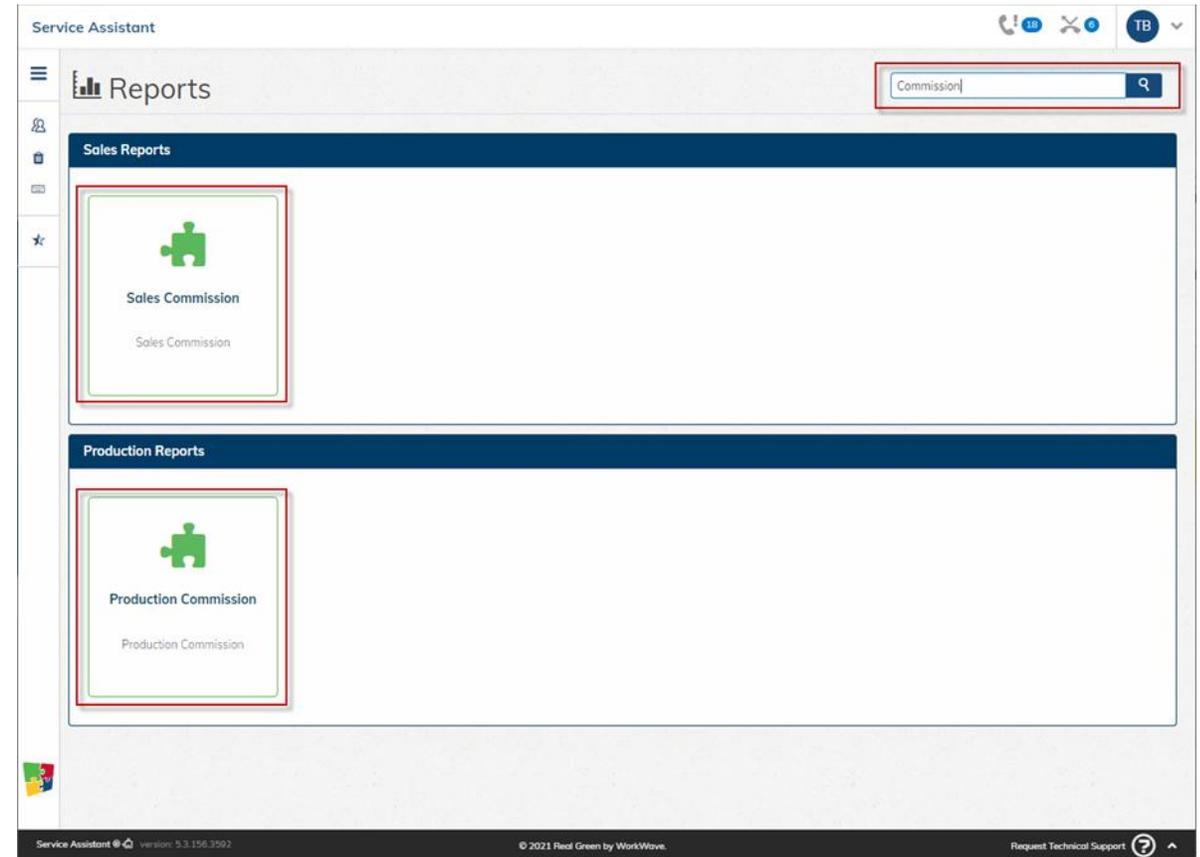
SA5 Commission: Reports

SA5 Commission: Reports

There are two commission reports available:

- Reporting > Sales Reports > Sales Commission Report
 - Evaluates the services against the salespeople and date ranges selected
- Reporting > Production Reports > Production Commission Report
 - Evaluates the services against the technicians and date ranges selected

You can also search by 'Commission' in the Filter by Report Name field.



SA5 Commission: Reports

Commission is driven by employees and dates:

- Salesperson/people: unposted work will use the service salesperson/people, and each posted service will have a corresponding salesperson/people that can be changed in History if needed
- Technician(s): unposted work will not be attributed to any technicians for commission purposes, and each posted service will have technician(s) assigned that can be changed in History if needed

The screenshot displays a software interface for program details. The top navigation bar shows 'Program Details' and 'Documents'. Below this, the account information is displayed: 'Account # 524', '9-Active Mr. Richard Franklin', '1412 Edwards Ln, Bloomfield Hills, MI 48013', and '(810) 855-6149'. The interface is divided into several sections:

- Customer Details:** Includes 'Reason' and 'Estimate Details'.
- Estimate Details:** Shows 'Requested Date: 12/3/2018', 'Requested By: Thom Boersma', 'Request Taken By: Thom Boersma', 'Scheduled: [checked]', 'Printed Date', 'Printed By', 'Assigned Date', 'Assigned To', 'Given Date', 'Given By', 'Referred By #', and 'Rejected Date', 'Reject Reason'.
- Sales Details:** Shows 'Sold: 12/3/2018', 'Salesman 1: Kent Workman', 'Salesman 2: Andy Bathgate', 'Confirmed', 'Confirmed By', 'Payment Plan', 'Payment Plan By', 'Confirmation Letter', 'Renewed', 'Auto Renew', and 'Renewal Date: 12/31/2018'.
- Services:** Contains a table of services with columns: #, Description, Status, Size, Price, Discount, Association, Scheduled, Printed, Done, Call Ahead. The table lists three services: 'L01 - EARLY SPRING APPLICATION', 'L02 - LATE SPRING APPLICATION', and 'L03 - EARLY SUMMER'.
- Invoice Section:** Shows 'Invoice No.: 374643', 'Posted: 12/3/2018', 'Paid: [checked]', 'Full Charge: \$55.00', 'Subtotal: \$55.00', 'Tax: \$5.50', 'Net Amount: \$60.50'. It also includes 'Assigned To: Thom Boersma', 'Completed By: CDG', 'Prepaid: [unchecked]', 'Renewal Size: 13.00', 'Renewal Price: \$55.00', 'Production Value: \$55.00', 'Window: [checked]', 'Time: [checked]', 'Promised: [unchecked]', 'Call Ahead: [checked]', 'Confirmed: [checked]', 'Reversed: [unchecked]', 'Man Hour: [checked]', 'Estimated Man Hours: 00:42:00', 'Sold: 12/3/2018', and 'Salesman: 1: Kent Workman, 2: Bathgate'.

SA5 Commission: Reports

Commission is driven by employees and dates:

1. Sold Date: unposted work will use the service sold date, and each posted service will have a corresponding sold date that can be changed in History if needed
2. Confirm Date: this date is usually the same as the sold date, but may differ if the company confirms sales after the date of sale
3. Done Date: the date the service was completed
4. Paid Date: the date the service was fully paid (based on the latest allocation of payments or credits)

The screenshot displays a software interface for program details. The top section shows account information for Mr. Richard Franklin, including address and phone number. Below this, there are sections for Customer Details, Sales Details, and Cancellation Details. The Sales Details section includes fields for Sold Date, Confirmed Date, and Paid Date, with red boxes and arrows highlighting these dates. The Cancellation Details section shows Cancel Date and Reason. On the right side, there is a table with columns for Description, Status, Size, Price, Discount, Association, Scheduled, Printed, Done, and Call Ahead. The table contains four rows of data, with the first row highlighted. A red box highlights the 'Done' date of 4/18/2018 for the first row. A red box highlights the 'Paid' date of 12/3/2018 for the first row. A red box highlights the 'Confirmed' date of 12/3/2018 for the first row. A red box highlights the 'Sold' date of 12/3/2018 for the first row. A red arrow points from the 'Sold' date to the 'Confirmed' date, and another red arrow points from the 'Confirmed' date to the 'Paid' date.

SA5 Commission: Reports

Customer Details:

Acct. #: customer account

Company/Name: company or customer name on the account

Address: service address of the account

Service Details:

Date: date and type of date criteria used for the commission payment

Service: service code

Service Price: sales price before any discounts/surcharges

Net Amount: sales price after any discounts/surcharges

Commission Details:

Split: split commission will be designated with a 50% (sales) or variable % (production), any single commission services will be blank

Rate: the rate(s) assigned on the Commission Template (\$ and % will stack)

Commission On: sales amount used for commission calculations

Commission: commission paid for that service

Acct #	Company/Name	Address	Date	Service	Service Price	Net Amount	Split	Rate	Commission On	Commission	
For Employee		CLC - Calvin Coffel									
RGS Ninja											
31815	The Great Escape	448 N Rochester Rd	05/19/16	Sold	DE	1,000.00	1,000.00	50%	\$10.00/5%	500.00	30.00
31837	Racine, Franklin and	128 S Castell Ave	09/21/16	Sold	L01	33.10	33.10		5%	33.10	1.66
					L02	33.10	33.10		5%	33.10	1.66
					L03	33.10	33.10		5%	33.10	1.66

SA5 Commission: Reports

Sales Commission Report:

- Uses criteria set for the 1st Year and Perpetual Sales fields
- Uses the employee(s) in Sold By 1 and/or Sold By 2
- Only employees with assigned sales commission templates are included
- Uses dates as defined by the Paid drop-down options:
 - Sold, Confirmed, Done, or Paid
- Reversed services will not be included in commission totals
- Canceled services will appear as negative values (if the cancel date is within the date range selected)
 - Sold Date and Confirmed Date commission only
- 'N' status rounds are not included in commission, but will not be deducted from later reports if changed from 'Y' to 'N'
- Split commission will always be a 50/50 split

The screenshot shows the 'Sales Commission Report' interface in the Service Assistant application. The breadcrumb trail is 'Service Assistant > Reports > Sales Commission Report'. The main form includes a 'Branch' dropdown set to 'All Branches Selected'. Below this is a 'Salesperson' section with an 'Available Sales Person' list on the left and a 'Selected Sales Persons' list on the right. The 'Selected Sales Persons' list contains: 'ZZZ - Any Technician', 'MNH - Andrew Maki', 'TLB - Thom Boersma', and 'BAM - Brian Maxwell'. Navigation arrows (double right, single right, single left, double left) are between the lists. The 'Date Range' is set to 'Yesterday' and 'Sort By' is 'Customer Number'. There is a 'Summary Only' checkbox. Below the main form is a 'More filters' section with expandable options: '+ Flag Codes' and '+ Advanced Options'. Under 'Advanced Options', there are checkboxes for 'Send To Mapping Filter' and 'Simple Customer List'. At the bottom, there are 'Cancel', 'Preview', and 'Generate' buttons.

SA5 Commission: Reports

Sales Commission Report Example:

- The Sales Commission Report is sorted by salesperson, and then sub-totaled by branch (should the employee make sales in different branches)
- Only services that meet commission criteria will be included on the report

Sales Commission Report										RGS Ninja	
12/29/16										01/01/16 - 12/29/16	
										For All Salespeople	
Acct #	Company/Name	Address	Date		Service	Service Price	Net Amount	Split	Rate	Commission On	Commission
For Employee		CLC - Calvin Coffel									
RGS Ninja											
31815	The Great Escape	448 N Rochester Rd	05/19/16	Sold	DE	1,000.00	1,000.00		5%	1,000.00	50.00
31837	Racine, Franklin and	128 S Castell Ave	09/21/16	Sold	L01	33.10	33.10		5%	33.10	1.66
					L02	33.10	33.10		5%	33.10	1.66
					L03	33.10	33.10		5%	33.10	1.66
					XAS	33.10	33.10		5%	33.10	1.66
					L04	33.10	33.10	50%	5%	16.55	0.83
					L05	33.10	26.48	50%	5%	16.55	0.83
31821	,	123 Main Ct	10/03/16	Sold	MH	75.00	75.00		5%	75.00	3.75
31816	Tumer, Timothy	124 S Castell Ave	12/23/16	Produced	L03	50.00	50.00		2%	50.00	1.00
31839	Daniels, Jack	30469 S Westmore Dr	12/28/16	Sold	124	100.00	100.00	50%	5%	50.00	2.50
						RGS Ninja	1,423.60	1,416.98		1,340.50	65.55
Employee Total:						CLC - Calvin Coffel	1,423.60	1,416.98		1,340.50	65.55

SA5 Commission: Reports

Sales Commission Report Calculations:

- 1st Year Sold-Skips Not Paid: 1st Yr. Sales \$ = \$3 and 1st Yr. Sales % = 5%

\$55/app: $(\$3 + (\$55 \times 0.05)) = \$5.75/\text{app}$ in commission

- Perpetual Sales-Produced: Perpetual Sale % = 2%

\$55/app: $(\$55 \times 0.02) = \$1.10/\text{app}$ in commission

- 1st Year Done-Skips Paid 2nd Year: 1st Yr. Sales % = 10%

\$48/app: $(\$48 \times 0.10) = \$4.80/\text{app}$ in commission
(first year and second year skipped included)

Sales Commission Report											Real Green Testing
12/22/17											12/22/17 - 12/22/17
											Salespeople: BOB
Acct #	Company/Name	Address	Date	Service	Service Price	Net Amount	Split	Rate	Commission On	Commission	
For Employee BOB - Bob Mathews											
Real Green Testing											
540	Cirner, John	917 S Reading Rd	12/22/17	Sold	L04	55.00	55.00	3.00/5%	55.00	5.75	
					L05	55.00	55.00	3.00/5%	55.00	5.75	
					L06	55.00	55.00	3.00/5%	55.00	5.75	

Sales Commission Report											Real Green Testing
12/22/17											06/01/17 - 10/31/17
											For All Salespeople
Acct #	Company/Name	Address	Date	Service	Service Price	Net Amount	Split	Rate	Commission On	Commission	
For Employee BOB - Bob Mathews											
Real Green Testing											
540	Cirner, John	917 S Reading Rd	08/05/17	Produced	L04	55.00	55.00	2%	55.00	1.10	
			09/23/17		L05	55.00	55.00	2%	55.00	1.10	

Sales Commission Report											Real Green Testing
12/22/17											01/01/16 - 10/31/17
											Salespeople: BAM
Acct #	Company/Name	Address	Date	Service	Service Price	Net Amount	Split	Rate	Commission On	Commission	
For Employee BAM - Brian Maxwell											
Real Green Testing											
578	Alex, Bob	29721 Minglewood Ln	10/15/16	Produced	L06	48.00	48.00	10%	48.00	4.80	
			04/02/17		LA	48.00	48.00	10%	48.00	4.80	
			06/05/17		L01	48.00	48.00	10%	48.00	4.80	
					L02	48.00	48.00	10%	48.00	4.80	

SA5 Commission: Reports

Sales Commission Report Grouping:

- The Sales Commission Report will first group by salesperson with each new salesperson starting a new page
- The report will sub-group by branch specific customer accounts
- The report will further sub-group by services on the specific customer accounts and then by date(s)
- The report will sub-total commission by branch and provide a grand total of commission owed

Sales Commission Report All Companies/Branches
01/01/16 - 12/31/16
For All Salespeople

12/29/16

Acct #	Company/Name	Address	Date	Service	Service Price	Net Amount	Split	Rate	Commission On	Commission
For Employee CLC - Calvin Coffel										
RGS Ninja										
31837	Racine, Franklin and	128 S Castell Ave	09/21/16	Sold	L01	33.10	33.10	5%	33.10	1.66
					L02	33.10	33.10	5%	33.10	1.66
					L03	33.10	33.10	5%	33.10	1.66
					XAS	33.10	33.10	5%	33.10	1.66
					L04	33.10	33.10	50%	16.55	0.83
					L05	33.10	26.48	50%	16.55	0.83
31821		123 Main Ct	10/03/16	Sold	MH	75.00	75.00	5%	75.00	3.75
31816	Turner, Timothy	124 S Castell Ave	12/23/16	Produced	L03	50.00	50.00	2%	50.00	1.00
31839	Daniels, Jack	30469 S Westminster Dr	12/28/16	Sold	124	100.00	100.00	50%	\$10,000.5%	7.50
31836	Smith, William	8601 Boulder Ct	12/29/16	Sold	TR1	33.10	33.10	5%	33.10	1.66
					TR2	33.10	33.10	5%	33.10	1.66
					TR3	33.10	33.10	5%	33.10	1.66
					TR4	33.10	33.10	5%	33.10	1.66
					TR5	33.10	33.10	5%	33.10	1.66
31837	Racine, Franklin and	128 S Castell Ave	12/29/16	Sold	TR1	33.10	33.10	5%	33.10	1.66
					TR2	33.10	33.10	5%	33.10	1.66
					TR3	33.10	33.10	5%	33.10	1.66
					TR5	33.10	33.10	5%	33.10	1.66
			12/30/16		TR4	33.10	33.10	5%	33.10	1.66
						RGS Ninja	754.60	747.98	671.50	37.15
Real Green Systems										
31810	The Great Escape	448 N Rochester Rd	05/19/16	Sold	DE	1,000.00	1,000.00	50%	\$10,000.5%	500.00
31817			12/16/16	Cancelled	GC	52.53	52.53	5%	52.53	-2.63
					GC	52.53	52.53	5%	52.53	-2.63
					GC	52.53	52.53	5%	52.53	-2.63
					GC	52.53	52.53	5%	52.53	-2.63
						Real Green Systems	1,210.12	1,210.12	710.12	19.48
Employee Total: CLC - Calvin Coffel							1,964.72	1,958.10	1,381.62	56.83

Acct #	Company/Name	Address	Date	Service
For Employee CLC - Calvin Coffel				
RGS Ninja				
31837	Racine, Franklin and	128 S Castell Ave	12/29/16	Sold
				TR2
				TR3
				TR5
				TR8
			12/30/16	Sold
				TR4

SA5 Commission: Reports

Sales Commission Report Summary:

- Often the amount of detail is not required, or only grand totals are needed
- Summary Only will break down the information by employee and branch

Sales Commission Report		All Companies/Branches			
12/29/16		06/01/16 - 12/29/16			
		Salespeople: CLC, IAI, JC, JJO, RGN, SQH, TECH, TEST, TJ			
Employee		Service Price	Net Amount	Commission On	Commission
CLC - Calvin Coffel					
	RGS Ninja	529.60	529.60	529.60	26.56
CLC - Calvin Coffel		529.60	529.60	529.60	26.56
JJO - Jasper Olson					
	RGS Ninja	100.00	100.00	100.00	5.00
	Real Green Systems	165.50	165.50	165.50	-8.30
JJO - Jasper Olson		265.50	265.50	265.50	-3.30
SQH - Sam Heiss					
	RGS Ninja	100.00	100.00	100.00	5.00
SQH - Sam Heiss		100.00	100.00	100.00	5.00
Grand Total		895.10	895.10	895.10	28.26

Service Assistant > Reports > Sales Commission Report

Sales Commission Report

Branch: All Branches Selected

Salesperson: Available Sales Person

Selected Sales Persons: ZZZ - Any Technician, MNN - Andrew Maki, TLB - Thom Boersma, BAM - Brian Maxwell

Date Range: Yesterday

Sort By: Customer Number

Summary Only

More filters

+ Flag Codes

+ Advanced Options

Send To Mapping Filter

Simple Customer List

Cancel Preview Generate

SA5 Commission: Reports

Production Commission Report:

- Uses criteria set for the production fields
- Uses the employee(s) in the Tech(s) field under History
- Only employees with assigned production commission templates are included
- Uses dates as defined by the Paid drop-down options:
 - Done or Paid date
- Reversed services will not be included in commission totals
- Split commission is determined by the percentage of work assigned at the production step, or reassigned in History

The screenshot shows the 'Production Commission Report' interface within the Service Assistant application. The breadcrumb trail at the top reads 'Service Assistant > Reports > Production Commission Report'. The main form includes the following elements:

- Branch:** A dropdown menu currently set to 'All Branches Selected'.
- Technician:** A selection interface with an 'Available Technicians' list on the left, a 'Selected Technicians' list on the right, and four arrow buttons (two right-pointing, two left-pointing) between them. The 'Selected Technicians' list contains: 'ZZZ - Any Technician', 'MNN - Andrew Maki', 'TLB - Thom Boersma', and 'BAM - Brian Maxwell'.
- Date Range:** A dropdown menu set to 'Yesterday'.
- Sort By:** A dropdown menu set to 'Customer Number'.
- Summary Only:** An unchecked checkbox.
- More filters:** A section with expandable options:
 - Flag Codes:** A plus sign icon.
 - Advanced Options:** A plus sign icon, with two sub-options: 'Send To Mapping Filter' (unchecked) and 'Simple Customer List' (unchecked).

At the bottom of the form, there are three buttons: 'Cancel', 'Preview' (with a magnifying glass icon), and 'Generate'.

SA5 Commission: Reports

Production Commission Report Example:

- The Production Commission Report is sorted by technician, and then sub-totaled by branch (should the employee complete work in different branches)
- Only services that meet commission criteria will be included on the report

Production Commission Report										All Companies/Branches	
12/21/17										11 - 12/31/18	
										For All Salespeople	
Acct #	Company/Name	Address	Date	Service	Service Price	Net Amount	Split	Rate	Commission On	Commission	
For Employee MNN - Andrew Maki											
Real Green Testing											
523	Jones, Humpty	1212 Boogie Woogie Ave	11/29/17	Produced	L05	52.00	52.00	5%	52.00	2.60	
			12/19/17		L06	52.00	41.60	5%	41.60	2.08	
			12/21/17		RBM	160.00	160.00	5%	160.00	8.00	
526	Marks, Monte	1485 Lochridge Rd	12/21/17	Produced	MOS	55.50	55.50	5%	55.50	2.78	
					Real Green Testing	319.50	309.10		309.10	15.46	
east - Precision Land Maintenance											
524	Franklin, Richard	1412 Edwards Ln	12/21/17	Produced	MO	100.00	95.00	5%	95.00	4.75	
					east - Precision Land Maintenance	100.00	95.00		95.00	4.75	
north - Bugs-B-Gone											
92257	Randazzo, Anne	4502 Briarwood Ave	10/19/12	Produced	L06	31.00	31.00	5%	31.00	1.55	
					north - Bugs-B-Gone	31.00	31.00		31.00	1.55	
Employee Total: MNN - Andrew Maki						450.50	435.10		435.10	21.76	
Grand Total						450.50	435.10		435.10	21.76	

SA5 Commission: Reports

Production Commission Report Calculations:

- Production-Paid: Production \$ = \$2.50 and Production % = 10%

\$55/app: $(\$2.50 + (\$55 \times 0.10)) = \$8.00/\text{app}$ in commission

- Production-Produced: Produced % = 5%

\$55/app: $(\$55 \times 0.05) = \$2.75/\text{app}$ in commission

\$48/app: $(\$48 \times 0.05) = \$2.40/\text{app}$ in commission

Tech production can be broken down by percentage of work done.

In most cases these will be as equal as possible, but they can be changed as needed.

Treatment

Date: Start/Stop Time: Man Hours:

Crew:

BAM - Brian Maxwell	33	%
MNN - Andrew Maki	34	%
TLB - Thom Boersma	33	%
Crew Size: 3	100%	

[+ Add Employee](#)

Production Commission Report											All Companies/Branches 01/01/16 - 12/31/98 For All Salespeople	
Acct #	Company/Name	Address	Date	Service	Service Price	Net Amount	Split	Rate	Commission On	Commission		
For Employee TLB - Thom Boersma												
Real Green Testing												
540	Cirner, John	917 S Reading Rd	12/22/17	Paid	L05	55.00	55.00	\$2.50/10%	55.00	8.00		
					L06	55.00	55.00	\$2.50/10%	55.00	8.00		

Production Commission Report											All Companies/Branches 01/01/16 - 12/31/98 For All Salespeople	
Acct #	Company/Name	Address	Date	Service	Service Price	Net Amount	Split	Rate	Commission On	Commission		
For Employee MNN - Andrew Maki												
Real Green Testing												
540	Cirner, John	917 S Reading Rd	04/01/16	Produced	L04	55.00	55.00	5%	55.00	2.75		
578	Alex, Bob	29721 Minglewood Ln	10/15/16	Produced	L06	48.00	48.00	5%	48.00	2.40		
540	Cirner, John	917 S Reading Rd	04/01/17	Produced	L01	55.00	55.00	5%	55.00	2.75		
578	Alex, Bob	29721 Minglewood Ln	04/02/17	Produced	L01	48.00	48.00	5%	48.00	2.40		
540	Cirner, John	917 S Reading Rd	05/13/17	Produced	L02	55.00	55.00	5%	55.00	2.75		

Production Commission Report											All Companies / Branches All Employees Date Range : 10/20/2021 to 10/20/2021 Sort By : Customer Number	
Acct #	Customer / Name	Address	Date	Invoice No.	Service	Service Price	Net Amount	Split	Rate	Commission On	Commission	
For Employee BAM - Brian Maxwell												
south - Super Green												
89790	Mr. Bida, Michael	1137 Chestnut Ln, South Lyon, MI 48178	10/20/2021	375843	L01	28.00	28.00	33%	5%	9.24	0.46	
Produced												
south - Super Green												
						28.00	28.00				9.24	0.46
For Employee MNN - Andrew Maki												
south - Super Green												
89790	Mr. Bida, Michael	1137 Chestnut Ln, South Lyon, MI 48178	10/20/2021	375843	L01	28.00	28.00	34%	5%	9.52	3.88	
Produced												
south - Super Green												
						28.00	28.00				9.52	3.88
For Employee TLB - Thom Boersma												
south - Super Green												
89790	Mr. Bida, Michael	1137 Chestnut Ln, South Lyon, MI 48178	10/20/2021	375843	L01	28.00	28.00	33%	5%	9.24	3.76	
Produced												
south - Super Green												
						28.00	28.00				9.24	3.76

SA5 Commission: Reports

Production Commission Report Grouping:

- The Production Commission Report will first group by technician, with each new technician starting a new page
- The report will sub-group by branch specific customer accounts
- The report will further sub-group by services on the specific customer accounts and then by date(s)
- The report will sub-total commission by branch and provide a grand total of commission owed

Production Commission Report
12/21/17 All Companies/Branches
1/1 - 12/31/98
For All Salespeople

Acct #	Company/Name	Address	Date	Service	Service Price	Net Amount	Split	Rate	Commission On	Commission
For Employee MNN - Andrew Maki										
Real Green Testing										
523	Jones, Humpty	1212 Boogie Woogie Ave	11/29/17	Produced	L05	52.00	52.00	5%	52.00	2.60
			12/19/17	Produced	L06	52.00	41.60	5%	41.60	2.08
			12/21/17	Produced	RBM	160.00	160.00	5%	160.00	8.00
526	Marks, Monte	1485 Lochridge Rd	12/21/17	Produced	MOS	55.50	55.50	5%	55.50	2.78
					Real Green Testing	319.50	309.10		309.10	15.46
east - Precision Land Maintenance										
			12/21/17	Produced	MO	100.00	95.00	5%	95.00	4.75
					east - Precision Land Maintenance	100.00	95.00		95.00	4.75
north - Bugs.B.Gone										
			10/19/12	Produced	L06	31.00	31.00	5%	31.00	1.55
					north - Bugs.B.Gone	31.00	31.00		31.00	1.55
Employee Total: MNN - Andrew Maki						450.50	435.10		435.10	21.76
Grand Total						450.50	435.10		435.10	21.76

Production Commission Report
12/21/17

Acct #	Company/Name	Address	Date	Service
For Employee MNN - Andrew Maki				
Real Green Testing				
523	Jones, Humpty	1212 Boogie Woogie Ave	11/29/17	Produced L05
			12/19/17	Produced L06
			12/21/17	Produced RBM
526	Marks, Monte	1485 Lochridge Rd	12/21/17	Produced MOS

SA5 Commission: Making Corrections

SA5 Commission: Making Corrections

All commission related items can be corrected via the History tab or on the service level (the ability to make these changes can be protected through security options).

- Paid Date: change by using the Reallocate button in history
- Done Date: change by editing the service in history
- Sold Date: change single application sold dates on completed services by editing the service in history
 - Change the sold date on future services by editing the sold date on the service details screen
- Confirm Date: change the confirmation date on the service details screen
- Salesperson: change single application salespeople on completed services by editing the service in history
 - Change the Sold By 1 and/or Sold By 2 on the job level for future services on the service details screen
- Technician(s): change the technician(s) and the percentage(s) of work by editing the service in history

SA5 Commission: Making Corrections

The screenshot shows the 'Treatment' window in the Service Assistant application. The 'Date' field is set to 10/20/2021. The 'Crew' section lists three employees: BAM - Brian Maxwell (33), MNN - Andrew Maki (34), and TLB - Thom Boersma (33). The 'Salesman 1' field is set to MDC - Michael Church, and the 'Salesman 2' field is set to No Employee Selected. The 'Sold Date' field is set to 08/17/2021. The 'Products' section shows two items: 35 - 35-3-5 and PE - Pendimethalin w/Fert.

The screenshot shows the 'Services' window in the Service Assistant application. The 'Sold Date' field is set to 8/17/2021. The 'Salesperson 1' field is set to MDC - Michael Ch... and the 'Salesperson 2' field is set to Select... The 'Confirmed' field is set to Confirmed. The 'Sales Details' section shows the 'Sold Date' field set to 8/17/2021 and the 'Salesperson 1' field set to MDC - Michael Ch... The 'Confirmed' field is set to Confirmed. The 'Payment Plan By' field is set to Select... and the 'Payment Plan Date' field is set to Select... The 'Renewed' field is set to Renewed and the 'Auto Renew' field is set to Auto Renew. The 'Renewal Date' field is set to 7/1/2022.

Session Feedback

- Login to the Event Mobile App
- Add this session to your schedule
- Click Survey
- Give it a rating 1-5 stars

Questions?

**Sign up on 2/4
and receive 20%
off your ticket!**

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