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INDITION COMMERCE

Sales Commissions

User Manual

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Use Sales Commissions to maintain compensation plans, review earnings and prepare recurring payouts. The weekly-pay workflow below keeps monthly or quarterly targets intact and provides a clear handoff from managers to payroll.

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- Use other schedules and target windows
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Run weekly payouts

Set the schedule once

In Payroll Payments, create a named schedule for a published plan. Choose Weekly, set the first pay-window start to the weekday your pay week begins, and set the calendar-day delay between cutoff and planned payday. Keep the desired monthly or quarterly target settings on the plan.

Repeat this workflow each week

1. Review Earnings through for the schedule. Use a completed day; the suggested value is the end of the last completed pay window.
2. Select Prepare payroll for review. Open the batch and review the allocated earnings, participant balances and payment information.
3. Review supporting statements and activity. Prepare the draft again after changing inputs so approval uses the current figures.
4. Approve the batch. Export the Excel workbook to your payroll process.
5. Complete the payout using your established payroll process.
6. Record each payment with its actual amount, date and reference. The payment history and outstanding balance update together.

Example of weekly earnings and a monthly goal

Suppose a salesperson has a monthly sales target of $20,000 and a base commission of 5%. With $4,000 in eligible sales during the first week, base commission is $200. A further $6,000 in the second week adds $300 in base commission and brings monthly attainment to $10,000, or 50%. Each week can be prepared for payout while the monthly target keeps accumulating.

This illustration uses a single base rate. Your published rules, eligible items, accelerators, incentives, adjustments and recorded payments determine the actual batch and balance.

Handle partial payments

Record the amount actually paid and its reference. When the remaining amount is paid, add another payment with its own reference. The outstanding balance follows the plan and participant across batches.

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Use other schedules and target windows

Schedule	How the window is aligned
Weekly	Seven days, using the anchor weekday.
Every two weeks	Fourteen days, using the anchor weekday and starting week.
Twice monthly	The 1st through the 15th, then the 16th through month end.
Monthly	Calendar months.
Quarterly	Three-month windows aligned to the anchor month.
Annual	Twelve-month windows aligned to the anchor month.
Custom	Select the completed cutoff that fits your payroll cycle.

Keep payment and target dates purposeful

The payment schedule controls when you prepare payouts. The plan and quota settings control the earning and target windows. Weekly payments can therefore sit inside a monthly target, and several payment cycles can share quarterly attainment.

The planned payday adds the configured number of calendar days to the cutoff. Record the actual payment date when you pay the team. Paid-year reporting uses that actual date, which keeps year-end reporting tied to the payment record.

Maintain earning periods

Use Periods to create or generate earning windows covering your business dates. When a new plan version starts within an open window, use the guided split so each effective rate has its corresponding earning coverage. Review the rate summary before preparing the next payroll batch.

Manage individual and store targets

In Quotas, prepare and approve the relevant person and period targets. Use assignment or store-specific targets where the person has distinct responsibilities. Optional default-target proration follows active calendar days; individually specified quotas give managers direct control of the target amount.

Use period-based settlement

To pay everyone for a stretch of dates, such as one week, use Periods & Statements:

1. Open the period, for example First Week (11/01 through 11/08).
2. Select **Recalculate**. The button reads Calculating… and the page updates in place with each person’s amount.
3. Select **Statement** beside a person to see every job behind their amount.
4. When the figures are right, select **Approve & lock**, then **Yes, approve and lock**. The amounts no longer change; later corrections go into the next period.

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5. Select **Download** on the Participant statements heading and choose **Excel** for your payroll process, **PDF statements, one per person** for a ZIP with each person's statement, or **PDF statements, all in one file** for a summary page followed by each person.

To add or take away an amount for one person, select **Add adjustment** on the Manual adjustments heading, fill in the form and recalculate.

Every amount is paid in cents: each job is rounded to the cent once, and each person's amount and the period total are those lines added up, so the statement, the screen and the export always agree.

Give people their statements

Each statement is a branded PDF from the person's store, with its logo, address and phone, who it is for, the period, the total and every job with its amount, rate and commission. Print it or send it on:

- One person: open their statement and select **Export to PDF** at the top right.
- Everyone in a period: open the period, select **Download** and choose **PDF statements, one per person** for a ZIP of separate files, or **all in one file** to print them together.
- People with their own login can open My Statements when **Can see their own statements** is on in their details.

Payroll Payments provides recurring payouts within a longer earning window when your policy pays on a schedule.

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Maintain plans people and incentives

Prepare a future rate change

1. Open the plan and clone the relevant version into a draft.
2. Set the effective dates, defaults and any category, serialized-product, product, location or channel rules.
3. Review the simulator, rate summary and version comparison, then publish when ready.
4. Align open earning periods and assignments with the effective dates before the next payroll preparation.

Use product overrides

Open the Inventory SKU editor and its Commission tab. Choose the draft plan context, then use inherited settings or enter product-specific eligibility, method, rate and quota weighting. Save the SKU and complete the plan review before publication.

Pay only on serialized products

The Serialized products section of a plan pays products sold with a serial number, such as machines, apart from everything else. To pay commission on serialized products only:

1. Open the draft plan and switch on **Serialized products**. It sits between Category rates & exclusions and Product overrides & exclusions.
2. Select **Pay only on serialized products**. This adds a row that sets **Products without a serial number** to **Nothing — excluded**.
3. To give serialized products a rate of their own, select **Add a serialized-product rate**, choose **Serialized products** and enter the rate.
4. Save the draft, check the rate summary, and publish.

A product counts as serialized when serial numbers are switched on for it, or when a real serial number was sold on that order line. A placeholder such as “Placeholder”, “TBD”, “N/A”, all zeros or dashes is not a serial number and never makes a sale serialized.

A product override still beats a serialized-product rate, and a serialized-product rate beats a category rate. A row left on **Inherit from the default** keeps the category or default rate. These rates apply to store and website sales; repairs keep their own rates. A spiff still pays on products this leaves unpaid.

Keep people and credit current

Open Salespeople & Technicians. The Paid on column shows each person’s work: a green chip names the plan that pays it, and an amber chip marks work nothing pays yet, so a gap is easy to spot before payroll.

Open a person to see What they’re paid on. It has one row for each kind of work: Store sales, Repairs they take in, Repairs they do and Quality checks. Each row says which plan pays it and from when, or in plain words why nothing pays it, for example that the plan does not pay repairs or has no rate for that work.

- **Pay**: choose a plan and a From date. Only plans that pay that kind of work are offered. From suggests the person’s start date, or today once that date has passed. Paying also switches that work on for them.
- **Change plan**: choose the new plan. When another plan already pays the work, the page asks before anything changes. Yes, switch ends the current plan the day before the new one starts; No, leave it keeps everything as it was.

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- **Stop paying**: the plan stops paying them on that work as of today. Commission already earned is kept.
- **Turn back on**: when the work is switched off for the person, one click switches it on again.

Save details keeps their name, login, employee code, dates and locations. Targets and Payment history follow on the same page.

Pay many people at once

1. On Salespeople & Technicians, tick the people to pay. Tick nobody to use everyone the list shows with its current filters; the panel says how many people that is.
2. Choose Actions, then Pay people on a kind of work.
3. Choose the work, the plan, and whether each person starts on their own start date or a date you choose, then select Pay them.

A plan that cannot pay that work is refused before anyone changes. When some people are already paid on that work by another plan, the list names them and asks once: Yes, switch them, or No, leave them. Everyone else is paid straight away.

Review sales credit

On Attribution, find an order or repair by its business number, review the contributors and enter the intended split and reason. The workflow retains a history of changes.

Create a spiff

1. Open Spiffs and choose the date window and product, category or vendor scope. Search products by SKU or name.
2. Set the flat-per-unit or percentage amount and any location, unit cap or monetary cap.
3. Choose company or vendor funding and the sales split or named recipient.
4. Choose how the incentive combines with regular commission, save it and review its effect on open periods.

Import quota targets

Use Quotas Import to upload CSV or XLSX, map the fields and apply the targets. Review the resulting records and approve them when ready. Import Logs provides the user, file, date and record count, with links to the source download and the imported quotas.

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Review performance and keep payroll connected

Choose the report for the decision

- Period liability and performance: review commission components, participant totals, sources, channels and quote pipeline.
- Attainment and trend: compare target progress across people and recent periods.
- Commission cost: understand compensation as a share of revenue by category, location and channel.
- Attribution reporting: review declared sellers, cashier policies, house-account credit and manager changes.
- Participant statements and My Statements: follow the rate and attainment behind each earning.
- Spiffs: review incentive budgets and vendor-funded totals for reimbursement preparation.

Every report and statement exports to Excel and to PDF from the buttons at the top right. Apply the filters first so the export matches the question you are reviewing. With no period chosen, a report opens on the most recent period that has been calculated.

Include subsequent activity

Later eligible sales and refund-related adjustments enter a subsequent payroll batch. Each adjustment retains its original source relationship and approved payroll history. Proportionate refunds use the original commission and incentive awards, keeping the explanation consistent with the initial earning.

Use reconciliation and recovery

Commission checks recent sales and repairs every night. To bring in an earlier stretch of dates, open Settings, enter the dates under Recover missed activity and select **Preview recovery**: it says how many orders and repairs it will check, and nothing is recorded yet. Select **Apply recovery** to record them. The result appears under the form and says what was added; anything that could not be recorded yet is named and tried again every night.

Review items requiring a decision

The dashboard shows each period once, with its current commission, and a Needs attention list. The Exceptions page lists only what someone at your shop can act on:

- A repair or sale with nobody credited: open it and name who sold or did the work.
- Someone who earned but is not on a plan: select **Pay** with their name to open their page, pay them, then recalculate the period. The item clears by itself.
- Items Commission retries by itself say “Nothing to do here. It clears by itself.”

Sales with no salesperson are listed only when one of your plans pays store sales. Work that no plan pays is not a problem to work.

Give each person the right view

The people who run commission use these screens to maintain plans, people, incentives, reports and payroll. Salespeople and technicians with their own login use My Statements for their personal earning history.

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