Ascente
Service
Commission Processing

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www.compusource.com

http://www.servicecontractorsoftware.com/

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Overview

We are only discussing commissions based on processing using the Ascente Service module.

It has been our experience that commission schemes are unique to almost every company. Some pay based on sales, some on profits, some based on after the invoice has been paid.

Some commissions are calculated on a fixed percentage and some on a tiered system based on the total sales. Some split commissions between technicians and sales reps. Some have multiple technicians working on a specific service job that can get commissions split between them.

These are just a few of what we have seen.

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Overview

What I am getting to is that there is not one solution that will work for every company and the Ascente commissions method will not either. We do have many using the Ascente commissions.

This presentation will show the assumptions that Ascente uses to calculate and report commissions.

This processing will result in a report that will detail and total the calculated commissions and spiffs. You can use these totals for payroll processing. There is no direct interface between the payroll and general ledger modules for the commissions referenced here.

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Overview

If the Ascente commissions method does not work for you, reports can be created to determine the sales and profit totals invoiced through the Ascente Service module that you may need for your commission calculations.

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Assumptions

Commissions are determined based on the following factors at the work order detail line level:

- Technician

- The technicians assigned fixed commission rates by Bill Type.

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Operations: Work Order Entry

Commissions are calculated based on the sales for each *work order* detail line and the *commission rate* assigned to the *technician* for that *Bill Type*.

Technician:
Tech receiving the commission..
This can be edited.

Commission Amount:
Comm % * Extended Price.
This can be edited.

Commission %: This is determined by the Technician record for the Labor – Bill Type. *This can be edited.*

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Operations: Work Order Entry

Operations: Prebill

The *serv*... needs
to have ... e.

The invo... not
any oth...

Invoice Date: This is the date used for commissions reporting. *This can be edited.*

Prebill Report Name: Select the '*Prebill with Commissions Detail*' if you want the Prebill to include the calculated commissions totals.

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Operations: Prebill

Invoice Date: This is the date used for commissions reporting.
This can be edited.

Prebill Report Name: Select the '*Prebill with Commissions Detail*' if you want the Prebill to include the calculated commissions totals.

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Operations: Prebill

Technician:	John Connor									

Service Order	**LA010493**		Status	Closed		Invoice #	LA010493			

Job Site Name	Austin Cox	Branch	LA	Tech	John Connor	Invoice Method	T&M
Jobsite Alpha	Austin Cox Lot 123	Department	Service	Invoice Print	Print Detail	Price Level	Member
Customer	Austin Cox	Tax Group	LA	Summarize	No Summary	Maint Pricing	Billable
Terms	10	Type	Plumbing	PO #	9876	JPR Status	Extra/Emer

Work Order	**LA010493**	7/29/19	Status: Closed				Tech: John Connor		
Bill Type	Location	Item	Description	Quantity	Unit Cost	Ext Cost	Unit Price	Ext Price	Tax	Prof%
Labor	1 Califorr L		John Connor Date: 7/29/2019	1.00	40.87	40.87	130.00	130.00	0	69.0%
	Tech: John Connor		Rate: 25.00%	Comm: $32.50						*********
Materia	1 Califorr Disp	Disposal		1.00	70.00	70.00	150.00	150.00	1	53.0%
	Tech: John Connor		Rate: 1.00%	Comm: $1.50	Spiff: $5.00					
Materia	1 Califorr		Pmt: CreditCard 3213 299.13	.00		.00		.00	1	

Problem   Disposal not working   WO Desc   WO LA010493: Install new disposal

Total Service Order	Non Taxable Sales	Taxable Sales	Sales Tax	UseTaxable Sales	Use Tax	Total Cost	Profit %	Payments	Invoice Total
LA010493	130.00	150.00	19.13	.00	.00	110.87	60.40%	299.13	299.13

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Operations: Technician Commission Reports

The Technician Commission report displays commissions from processed invoices for technicians within a user specified branch, technician, and date range. Each technician may have his own set of commission rates per bill type. The report selects invoices within the specified range and calculates commissions on labor (for primary and secondary technicians), parts, spiffs, and other (equipment, sub-contract, etc.) per jobsite and technician. There are 4 formats available:

- Technician Commission Summary

- Technician Commission by Branch/Tech

- Technician Commission Report

- Technician Commission with Sales

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Operations: Technician Commission Reports

Technician Commission Summary

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Operations: Technician Commission Reports

Technician Commission by Branch/Tech

07/29/19
2:00 pm

4.2 Test Company
Technician Commission by Branch/Tech
Date: 7/29/2019 through 7/29/2019

InvoiceNumber	Invoice Date	Net Invoice	Commissionable Labor Sales	Commissionable Part Sales	Commission Due				Cancel	Maint	Estimate	Call Back	Sales
					Labor	Parts	Spiff	Total					
Branch: LA													
Tech: John Connor													
LA010493	7/29/19	$280.00	$130.00	$150.00	$32.50	$1.50	$5.00	$39.00	0	0	0	0	0
Total Tech: John Connor		$280.00	$130.00	$150.00	$32.50	$1.50	$5.00	$39.00	0	0	0	0	0
Total Branch: LA		$280.00	$130.00	$150.00	$32.50	$1.50	$5.00	$39.00	0	0	0	0	0

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Operations: Technician Commission Reports

Technician Commission Report

4.2 Test Company
Technician Commission Report
Date: 7/29/2019 through 7/29/2019

********Commission Due********

Jobsite	Invoice #	Date	Net Invoice	Labor	Parts	Spiff	Cancel	Maint	Estimate	Call Back	Sales
Branch LA											
Technician John Connor											
Austin Cox	LA010493	7/29/2019	280.00	32.50	1.50	5.00	0	0	0	0	0
Total Tech: John Connor			280.00	32.50	1.50	5.00	0	0	0	0	0

Net Calls	1	Total Commission $39.00
Average Per Call	$280.00	

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Operations: Technician Commission Reports

Technician Commission with Sales

07/29/19
2:03 pm

4.2 Test Company
Technician Commission with Sales
Date: 7/29/2019 through 7/29/2019

| InvoiceNumber | Invoice Date | Net Invoice | Commissionable Labor Sales | Commissionable Part Sales | ******** Commission Due ******** | | | | Cancel | Maint | Estimate | Call Back | Sales |
					Labor	Parts	Spiff	Total					
Branch: LA													
Tech: John Connor													
LA010493	7/29/19	$280.00	$130.00	$150.00	$32.50	$1.50	$5.00	$39.00	0	0	0	0	0
Total Tech: John Connor		$280.00	$130.00	$150.00	$32.50	$1.50	$5.00	$39.00	0	0	0	0	0
Total Branch: LA		$280.00	$130.00	$150.00	$32.50	$1.50	$5.00	$39.00	0	0	0	0	0

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Considerations

- The commissions reports primary data source is the Service Order History table. If you have had us include your Job Cost billings in the Service Order History table, this report totals will be incorrect. If that is the case for you, contact us to make the necessary adjustments.

- If commission totals or technician are incorrect because a service order was billed incorrectly, the only way to correct it is to do a credit memo to reverse the mistake and then create another service order to invoice correctly.

- The technician for the commission reports are NOT the technician on the *service order*. It uses the technician on each *work order* line. Use the [COMM] button from Work Orders to view or change the technician for a line item.

- If you need to split commissions between technicians, you will need to add multiple work order lines for each technician with the correct commissionable sales.

- Labor Sales are determined based on the Bill Type – Sales Category. '1' = Labor, all other sales categories 2-5 are considered as 'Parts' sales.

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Thank You!

We thank you for attending this webinar or watching this video and for choosing Ascente.

Please let us know if you have any questions or world like a follow-up call to discuss this in more detail.

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