

Start the recording



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.

The screenshot displays the 'Technician Maintenance' window. The 'Technician' field is set to 'John Connor'. The 'General' tab is active, showing fields for Name, Service, Branch, and Zone. The 'Service Order Types' section includes a table with 'Assign All Types' checked and a list of assigned types: Air Conditioning, Heating, and Maint - Billing. A red box highlights the 'Commission Percentage' table, which lists commission rates for different bill types.

Bill Type	Comm %
FR Task	10.00
Labor	25.00
Material	1.00

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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.

Work Order Commission Information

Technician: John Connor

Commission %: 25.00

Commission Amount: 32.50

Spiff Amount: 0.00

OK Cancel

Commission %:

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

Work Order LA010493 Service Order LA010493

Work Order Subtotal: 280.00 Invoice Subtotal:

Main Service Order Detail Invoice Amounts

Part Description Additional Description

L John Connor Date: 7/29/2019 Pay: Regular Work Date: 7/29/2019

Location	Bill Type	Tax Class	Component	Order Qty	Bill Qty	Backorder Qty	Unit Price	Unit Cost	Extended Price
1 California St	Labor	0 Nc	(None)	0.000	1.000	0.000	130.000	40.8700	130.00

Restock Date Unit Cost Extended Cost Unit Price Extended Price

40.8700 40.87 130.000 130.00

Line	Part	Description	Location	RestockDate	Purchase Order	Bill Type	Bill Qty	Order Qty	Unit Price	Unit Cost	Extended Price	E
1	L	John Connor Date: 7/29/2019	1 California Shop			Labor	1.000	0.000	130.000	40.8700	130.00	
2	Disp	Disposal	1 California Shop			Material	1.000	0.000	150.000	70.0000	150.00	

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Operations: Work Order Entry

The screenshot displays the 'Work Order Entry' interface. At the top, the 'Work Order' is identified as LA010493, with a subtotal of 280.00. The 'Service Order' is also LA010493, with an invoice subtotal of 280.00. The interface includes a 'Main' menu with options for 'Service Order', 'Detail', and 'Invoice Amounts'. A table below shows the work order details, including 'Part', 'Description', 'Location', 'Bill Type', 'Tax Class', 'Component', 'Order Qty', 'Bill Qty', 'Backorder Qty', 'Unit Price', and 'Extended Price'. The table has two rows: Line 1 (Labor) and Line 2 (Material). A 'Work Order Commission Information' panel on the right shows fields for 'Technician' (John Connor), 'Commission %' (1.00), 'Commission Amount' (1.50), and 'Spiff Amount' (5.00). Three callout boxes provide definitions: 'Commission %' is determined by the Technician record; 'Commission Amount' is calculated as Commission % * Extended Price; and 'Spiff Amount' is determined by the Part record.

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

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

Spiff Amount: Determined by the Part record. *This can be edited.*

Line	Part	Description	Location	RestockDate	Purchase Order	Bill Type	Bill Qty	Order Qty	Unit Price	Unit Cost	Extended Price
1	L	John Connor Date: 7/29/2019	1 California Shop			Labor	1.000	0.000	130.000	40.8700	130.00
2	Disp	Disposal	1 California Shop			Material	1.000	0.000	150.000	70.0000	150.00

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Operations: Prebill

The service needs to have

The invoice not any other

The screenshot shows the 'Prebill Register' window. It has a toolbar at the top with icons for home, print, search, refresh, and help. Below the toolbar is the 'Select Report Values' section, which includes an 'Invoice Date' dropdown menu set to '7/29/2019'. A callout box points to this field with the text: 'Invoice Date: This is the date used for commissions reporting. This can be edited.' Below this is the 'Range Selection' section, which has 'Beginning' and 'Ending' columns. Under 'Beginning', there are dropdowns for 'Branch' (set to '(Beginning)') and 'Technician' (set to '(Beginning)'). Under 'Ending', there are dropdowns for 'Branch' (set to '(Ending)') and 'Technician' (set to '(Ending)'). There are also search boxes for 'Service Order' with the value 'LA010493'. Below the range selection is the 'Field Selections' section, which includes a 'Sort By' dropdown set to 'Technician', a 'Repair / Maintenance' dropdown set to 'All', a 'Prebill Report Name' dropdown set to 'Prebill with Commission Detail' (highlighted in yellow), an 'Invoice Report Name' dropdown set to 'Invoice', and a 'Password' field. A callout box points to the 'Prebill Report Name' dropdown with the text: 'Prebill Report Name: Select the 'Prebill with Commissions Detail' if you want the Prebill to include the calculated commissions totals.' On the right side of the window, there are buttons for 'Register', 'Payment Summary', 'Invoices', and 'Update'. At the bottom right, there is a status bar showing the date '7/29/2019' and the time '1:32 PM'.

needs
?
not

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Operations: Prebill

The screenshot shows the 'Prebill Register' window. It features a toolbar at the top with icons for back, print, search, home, refresh, and help. Below the toolbar is the 'Select Report Values' section, which includes an 'Invoice Date' dropdown menu set to '7/29/2019'. A callout box points to this field with the text: 'Invoice Date: This is the date used for commissions reporting. This can be edited.' Below this is the 'Range Selection' section, which has 'Beginning' and 'Ending' columns for 'Branch', 'Technician', and 'Service Order'. The 'Service Order' field is populated with 'LA010493'. The 'Field Selections' section includes 'Sort By' (Technician), 'Repair / Maintenance' (All), 'Prebill Report Name' (Prebill with Commission Detail), 'Invoice Report Name' (Invoice), and a 'Password' field. A callout box points to the 'Prebill Report Name' field with the text: 'Prebill Report Name: Select the 'Prebill with Commissions Detail' if you want the Prebill to include the calculated commissions totals.' On the right side of the window, there are buttons for 'Register', 'Payment Summary', 'Invoices', and 'Update'. At the bottom right, the date '7/29/2019' and time '1:32 PM' are displayed.

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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%
			<i>Tech: John Connor</i>		<i>Rate: 25.00%</i>	<i>Comm: \$32.50</i>				
Materia	1 Califorr	Disp	Disposal	1.00	70.00	70.00	150.00	150.00	1	53.0%
			<i>Tech: John Connor</i>		<i>Rate: 1.00%</i>	<i>Comm: \$1.50</i>	<i>Spiff: \$5.00</i>			
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

7/29/19
1:55 pm

Page 1 of 1

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

Technician	Net Invoice	Commissionable Labor Sales	Commissionable Part Sales	***** Commission Due *****			Total	Cancel	Maint	Estimate	Call Back	Sales
				Labor	Parts	Spif						
Total: John Connor	\$280.00	\$130.00	\$150.00	\$32.50	\$1.50	\$5.00	\$39.00	0	0	0	0	0
Grand Total:	\$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 by Branch/Tech

07/29/19 2:00 pm Page 1 of 2

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

7/29/19 2:01 pm	4.2 Test Company Technician Commission Report Date: 7/29/2019 through 7/29/2019										Page 1 of 3
*****Commission Due*****											
<u>Jobsite</u>	<u>Invoice #</u>	<u>Date</u>	<u>Net Invoice</u>	<u>Labor</u>	<u>Parts</u>	<u>Spiff</u>	<u>Cancel</u>	<u>Maint</u>	<u>Estimate</u>	<u>Call Back</u>	<u>Sales</u>
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 Page 1 of 2

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.

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 would like a follow-up call to discuss this in more detail.

More training videos like this are available on our website www.compusource.com

<http://www.servicecontractorsoftware.com/>

