

Job Commission

How to setup and use

The job commission functionality within Protean lets you set up rules for when commission should be recorded and for which employees. You are then able to manage and report on this commission. Note that this only calculates commission on Engineers and Sales Reps for jobs only.

Setup

System > Job > Commission Profiles

| Job Sales | | Job Work | | | | Other | |
|----------------------|----------------------|--------------|----------------------|-------------------|----------------------|---------------------|----------------------|
| New Jobs Rate: | <input type="text"/> | Labour Rate: | <input type="text"/> | Misc Rate: | <input type="text"/> | Engineer Weighting: | <input type="text"/> |
| Recurring Jobs Rate: | <input type="text"/> | Parts Rate: | <input type="text"/> | Flat Charge Rate: | <input type="text"/> | | |

| Job Type | Job Sales | | Job Work | | | | Engineer Weighting |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| | New | Recurring | Labour | Parts | Misc | Flat Charge | |
| <input type="text"/> |

Main Tab

Profile: Name of commission profile. Click Add to create, can't just overtype new name.

Effective From: Can add different commission settings to be applied on different dates. E.g. commission goes up next year with inflation. Use yellow plus to add a new effective date and set relevant rates.

Job Sales:

New Jobs Rate: Percentage of sales. New jobs are defined by the 'New Wrk' tickbox in the job itself

Recurring Jobs Rate: If 'New wrk' is not ticked then this is classed as a recurring job

Job Work:

Labour Rate: Percentage of labour charges

Parts Rate: Percentage of parts charges

Misc Rate: Percentage of misc charges

Flat Charge Rate: Percentage of flat rate

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Other:

Engineer Weighting: Can be used to determine commission split between multiple engineers.

Job Types Overrides: Add overrides based on job type. E.g. commission on installs but not breakdowns

[Overrides tab](#)

Stock Type Overrides: Add overrides based on job type. E.g. commission on installs but not breakdowns

Parts Overrides: Override Parts commission based on specific part records

[Employee Record](#)

Assign job commission profile to relevant employees

| Working Times | | |
|---------------|-------|-------|
| | Start | End |
| Monday | 07:00 | 15:00 |
| Tuesday | 07:00 | 15:00 |
| Wednesday | 07:00 | 15:00 |
| Thursday | 07:00 | 15:00 |
| Friday | 07:00 | 15:00 |
| Saturday | 00:00 | 00:00 |
| Sunday | 00:00 | 00:00 |

System Settings

Job Commission Split Method:

This setting needs to be set by Protean.

4 options on how to split commission between multiple engineers:

Equipment Worked on – Based on the number of pieces of equipment worked on.

Labour Contribution – Based on the amount of hours spent on the job

Profile Weights – Based on the engineer weighting against their profile

Profile Weights but if equal use labour contribution – based on weighting or labour contribution if equal weighting

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Viewing and reporting on commissions

Home > Jobs > Job Commission

Job Commission

Filter

Employee: From: To: Job No:

Filter Reset

| Job No | Job Type | Customer | Employee | Work | New Sales | Recur Sales | Total | Notes |
|--------|----------|----------|----------|------|-----------|-------------|-------|-------|
|--------|----------|----------|----------|------|-----------|-------------|-------|-------|

Totals:

Adjust Commission

Job No: Employee: Date:

Work: New Sales: Recur Sales:

Notes:

Adjust Commission

Close

The job commission screen lets you view what commission has been calculated, make adjustments if needed and run a report of all commission due.

To run the report click the output a report in the bottom left hand corner. This will let you print, view or email the report. The report will only show what is filtered in the top section of this screen. You can see a report for all commission ever if everything was left blank. To see all commission for one employee then just enter the employee. Or you could see all employees over a certain period by leaving the name blank and entering a date range.

Job Commission - Detailed 17/03/2017 13:08:59

Filters: Commission between 01/03/2017 and 23/03/2017
Jobs: (All)
Employee: (All)

| Job No | Job Type | Completed | Customer | Invoice No | Invoice Date | Work | New Sales | Recur Sales | Total | Notes |
|----------------------|----------|------------|-----------------|------------|--------------|---------------|--------------|---------------|----------------|--------------|
| Chris Morgan | | | | | | | | | | |
| 17411 | Call out | 17/03/2017 | ABS Garages Ltd | 13987 | 17/03/2017 | £80.00 | £0.00 | £80.00 | £120.00 | |
| 17411 | Call out | 17/03/2017 | ABS Garages Ltd | 13987 | 17/03/2017 | -£20.00 | £0.00 | £0.00 | -£20.00 | mistake made |
| Totals | | | | | | £40.00 | £0.00 | £60.00 | £100.00 | |
| Report Totals | | | | | | £40.00 | £0.00 | £60.00 | £100.00 | |

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Adjusting Commission

If any commission has calculated incorrectly or if there are any one off instances where commission is different then you can make adjustments.

To do this, in the bottom half of the job commission screen you need to enter the job # and employee name. This will bring up the calculated commission charges which you can amend and then click Adjust Commission to make the amendment. This will then add an adjustment line onto your commission report.

The screenshot displays the 'Job Commission' software interface. At the top, there is a 'Filter' section with fields for 'Employee' (set to 'Chris Morgan'), 'From', 'To', and 'Job No', along with 'Filter' and 'Reset' buttons. Below this is a table with the following data:

| Job No | Job Type | Customer | Employee | Work | New Sales | Recur Sales | Total | Notes |
|--------|----------|-----------------|--------------|---------|-----------|-------------|---------|--------------|
| 17411 | Call out | ABS Garages Ltd | Chris Morgan | £60.00 | £0.00 | £60.00 | £120.00 | |
| 17411 | Call out | ABS Garages Ltd | Chris Morgan | -£20.00 | £0.00 | £0.00 | -£20.00 | mistake made |

At the bottom of the table, a 'Totals' row shows: £40.00, £0.00, £60.00, £100.00. Below the table is the 'Adjust Commission' form, which includes fields for 'Job No' (17411), 'Employee' (Chris Morgan), 'Date' (17/03/2017), 'Work' (£40.00), 'New Sales' (£0.00), 'Recur Sales' (£60.00), and 'Notes' (mistake made). There are 'Adjust Commission' and 'Close' buttons.