Updating and Resetting Commissions on an Order

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This guide explains how to update and reset commissions on orders. It is intended for system administrators.

Updating Commission Calculations

Commission calculations are updated on the server at set intervals, according to your <u>automation schedule preferences (http://aace6.knowledgeowl.com/help/configuring-automation-schedules</u>). Typically, the Update Commissions process runs every 30 minutes during business hours. However, you can manually update an order's commissions at the order's detail view: click Admin Actions (

Resetting Commissions on an Existing Order

Commission settings are applied when the order is initially created. If you have made changes that would affect commissions (e.g. updating LIC commission rates, assigning a different sales rep, etc), those changes apply automatically only to *new* orders. They are *not* automatically applied retroactively to existing orders. You must manually reset the commissions on existing orders:

- Navigate to the desired order, then click Edit.
 Note: If the order is already closed, in the detail view menu bar, click Actions > Open Order.
- 2. Make any needed changes (e.g. specify the new Sales Rep), then click **Save**.
- Click Admin Actions () > Reset Commissions.
 Note: You may need to scroll down in the list of Admin Actions. This reset brings in any changes to the commission setup for *all* order items in the order.

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4. If you manually re-opened the order, click **Actions** > **Close Order**.

After the order is closed, you can <u>generate a commissions statement for that sales rep</u> (https://aace6.knowledgeowl.com/help/previewing-and-generating-commission-statements), showing the commission information for the modified order.

Resetting Commissions on Multiple Orders

If several existing orders need to be updated, first make any needed changes to each order, then reset the commissions calculations for the entire batch:

- 1. At the **Orders** list view, use the Quick Search bar to display the orders that need commissions updated.
- 2. Click Admin Actions > Reset Commissions for Orders in List.
- 3. At the confirmation dialog, click **Continue** and then **OK**.

Note: You can also update all orders that include certain LICs as order items. Navigate from Main Menu > Order Management > Details > Order Items > Admin Actions > Reset Commission Logic for Items in List.