

Setting Up Commissions

Last Modified on 01/10/2023 12:36 pm EST

This guide summarizes how to enable and configure commissions for various records. Some functionality is limited to system administrators, while other features can be handled by advanced users.

System administrators can enable [aACE commissions calculations](https://aace6.knowledgeowl.com/help/understanding-commission-structures) for team members, line item codes (LICs), referral companies, and rate cards. Organizations using aACE typically enable commissions several weeks or months after go-live.

Note: Commission settings are *not* retroactive. For example, commissions are applied to an order when the order moves to Open status. Any orders that are already open when you enable commissions will not reflect your commissions settings. To calculate commissions for existing orders, you must manually [update or reset the commissions](https://aace6.knowledgeowl.com/help/updating-and-resetting-commissions-on-an-order)

<https://aace6.knowledgeowl.com/help/updating-and-resetting-commissions-on-an-order>.

Enabling Commissions Preferences

After the system administrator enables commissions, the commission amounts will be automatically calculated for *new* orders.

1. Navigate from **Main Menu > Accounting > Preferences > Data Entry**.
2. In the Commissions section, mark the flag to **Enable Commissions**.
3. Click **Commit Updates**.
4. Navigate from **Main Menu > System Admin > Preferences > Automation Schedules**.
5. Mark the flag for the **Update Commissions** schedule script.

Note: You can also [customize the timing](https://aace6.knowledgeowl.com/help/configuring-automation-schedules) when this schedule runs.

6. Click **Commit Updates**.

Setting Up Team Member Commissions

Team members in a [user group with the required privileges](https://aace6.knowledgeowl.com/help/controlling-access-to-aace-modules-with-user-groups) can set up commissions for other team members.

You can have both sales reps and account managers in your system. aACE commissions calculations are slightly different for these two groups. This provides more flexible

calculations for sales reps, and provides more streamlined calculations for account managers. (Read more about [understanding commission structures](#).

(<https://aace6.knowledgeowl.com/help/understanding-commission-structures>)

1. Navigate from **Main Menu > Internal > Team Members**.
2. Locate the desired user.
3. At the detail view, click the **Human Resources** tab.
4. Click **Edit**.
5. In the Compensation Setup section, enter the **Commission Type** and **Comm %**.
6. Click **Save**.

Setting Up Line Item Codes Commissions

Team members in a [user group with the required privileges](#) (<https://aace6.knowledgeowl.com/help/controlling-access-to-aace-modules-with-user-groups>) can set up commissions for LICs.

Specific sales items can be assigned their own commission rates or can be excluded entirely from commissions calculations. The commission rate for an LIC takes priority over a team member's default commission rate. This makes it easier to incentivize sales for certain products.

1. Navigate from **Main Menu > Order Setup > Line Item Codes**.
2. Locate the desired item.
3. At the detail view, navigate to the **Setup** tab.
4. Click **Edit**.
5. In the Commissions and Rate Setup section, enter the **Comm Type** and **Comm Value**.
6. Enter [Volume Commissions](#) (<https://aace6.knowledgeowl.com/help/working-with-volume-commissions>) (VCS), if needed.
7. Click **Save**.

Note: If you update commissions settings on an LIC, any currently open orders that include that LIC will *not* reflect the updated settings. You must manually [update or reset the commissions](#) (<https://aace6.knowledgeowl.com/help/updating-and-resetting-commissions-on-an-order>) on those orders.

Setting Up Referral Companies Commissions

Team members in a [user group with the required privileges](#) (<https://aace6.knowledgeowl.com/help/controlling-access-to-aace-modules-with-user-groups>) can set up commissions for companies that refer new customer companies to you.

This rate is set at the referral company record. It is applied to all orders from new customers. Commissions are accrued to the company assigned as the Referral Company on a new customer's company record.

1. Navigate from **Main Menu > CRM & Sales > Companies**.
2. Locate the desired company.
3. At the detail view, click the **Sales & Marketing** tab.
4. Click **Edit**.
5. In the Sales Info section, enter the **Ref Comm Type** and **Ref Comm %**.
6. Click **Save**.

Setting Up Rate Cards Commissions

Team members in a [user group with the required privileges](https://aace6.knowledgeowl.com/help/controlling-access-to-aace-modules-with-user-groups) can set up commissions on rate cards. You can apply commission schemes for specific customers or orders. These commission settings *override* other commission rates (e.g. from team members or LICs).

There are two ways to specify commissions on a rate card:

- One default rate applied to multiple LICs
- Multiple, specific rates for specific LICs

Set One Default Commission Rate for Multiple LICs

1. Navigate from **Main Menu > Order Setup > Rate Cards**.
2. Locate the desired rate card.
3. At the detail view, click **Edit**.
4. In the General Info section, enter the **Comm Type** and **Comm Value**.
5. Enter [Volume Commissions](https://aace6.knowledgeowl.com/help/working-with-volume-commissions) (VCS), if needed.
6. Click **Save**.

Set Multiple, Specific Commission Rates for Specific Line Item Codes

1. Use the steps above to begin editing the desired rate card.
2. In the Rate Card Items list, locate the desired LIC and clear the **Default** flag next to Comm Type.
3. Enter the specific **Comm Type** and **Comm Value**.
4. Click **Save**.

