

# Setting Up Commissions

Last Modified on 02/25/2022 11:41 am EST

This guide summarizes how to enable commissions and configure them for various kinds of records. It is intended for advanced users.

You can enable [aACE commissions calculations](http://aace5.knowledgeowl.com/help/understanding-commission-structures) (<http://aace5.knowledgeowl.com/help/understanding-commission-structures>) for team members, line item codes, referral companies, and rate cards. Most organizations typically enable commissions several weeks or months after go-live.

Note: Commission settings are *not* retroactive. 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 these orders, you must manually [update or reset the commissions](http://aace5.knowledgeowl.com/help/updating-and-resetting-commissions-on-an-order) (<http://aace5.knowledgeowl.com/help/updating-and-resetting-commissions-on-an-order>).

## Enabling Commissions Preferences

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

1. Navigate from **Main Menu > Accounting > Preferences > Data Entry > Commissions**.
2. Mark the flag to **Enable Commissions**.
3. Navigate from **Main Menu > System Admin > Preferences > Automation Schedules > Update Commissions**.
4. Mark the flag for the **Update Commissions** schedule script.

Note: You can also [customize the timing](http://aace5.knowledgeowl.com/help/configuring-automation-schedules) (<http://aace5.knowledgeowl.com/help/configuring-automation-schedules>) when this schedule runs.

## Setting Up Team Members Commissions

You can have sales reps and account managers in your system. aACE provides more flexible commissions calculations for sales reps. It provides more streamlined calculations for account managers. (Read more about [understanding commission structures](http://aace5.knowledgeowl.com/help/understanding-commission-structures). (<http://aace5.knowledgeowl.com/help/understanding-commission-structures>))

1. Navigate from **Main Menu > Internal > Team Members**.
2. Locate the desired user, and at the detail view, click the **Human Resources** tab.
3. Click **Edit**.

4. In the Compensation Setup section, enter the **Commission Type** and **Comm %**.
5. Click **Save**.

## Setting Up Line Item Codes Commissions

Specific sales items can be assigned their own commission rates or can be excluded entirely from commissions calculations. The commission rate for a line item code (LIC) takes priority over default team member commissions. 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, in the General Info section, enter the **Comm Type** and **Comm Value**.
4. Enter optional settings, if needed:
  - **Volume Commissions** (<http://aace5.knowledgeowl.com/help/working-with-volume-commissions>) (VCS)
  - **Exclude from Commissions** – Mark this flag to *prevent* any and all commissions from being calculated for this LIC.
5. 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](http://aace5.knowledgeowl.com/help/updates-and-resetting-commissions-on-an-order) (<http://aace5.knowledgeowl.com/help/updates-and-resetting-commissions-on-an-order>) on those orders.

## Setting Up Referral Companies Commissions

This rate is applied to all orders where the company is 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 details view, click the **Customer Details** tab.
4. Click **Edit**.
5. In the Billing Setup section, enter the **Ref Comm Type** and **Ref Comm Pct**.
6. Click **Save**.

## Setting Up Rate Cards Commissions

You can apply commission schemes for specific customers or orders using the Rate Cards module. These commission settings *override* other commission rates (e.g. from team members

or line item codes). There are two ways to specify commissions on a rate card:

- One default rate applied to multiple line item codes
- Multiple, specific rates for individual line item codes

### **Set the Default Commission Rate**

1. Navigate from **Main Menu > Order Setup > Rate Cards**.
2. Locate the desired rate card.
3. Click **Edit**.
4. In the General Info section, enter the **Comm Type** and **Comm Value**.
5. Click **Save**.

### **Set Specific Commission Rates for Specific Line Item Codes**

1. Navigate from **Main Menu > Order Setup > Rate Cards**.
  2. Locate the desired rate card.
  3. In the Rate Card Items list, locate the desired LIC.
  4. Clear the flag for **Default** for that line.
  5. Enter the specific **Comm Type** and **Comm Value**.
  6. Click **Save**.
-