



Advanced Commissions

Commission Structure Questionnaire

To navigate form, click your Tab Key to proceed to next field.

General Information:

Number of Salespeople:	Internal	
	External	
Number of Managers		
Number of Customers		
Number of Inventory Items		
Number of sales, AR, contract or product invoices annually		
Number of Commission Plans		

Salesperson Parameters:

Are salespeople generally tied to customers or does it vary from sale to sale?

Are sales commission based on any of the following (mark all that apply)?

- | | |
|--|--|
| <input type="checkbox"/> Customer | <input type="checkbox"/> Customer/Inventory Item combination |
| <input type="checkbox"/> Customer Class | <input type="checkbox"/> Customer/Ship-To Address combination |
| <input type="checkbox"/> Inventory Item | <input type="checkbox"/> Customer/Inventory Item/Ship-To Address combination |
| <input type="checkbox"/> Item Class | <input type="checkbox"/> Sales Territory/Inventory Item combinations |
| <input type="checkbox"/> Sales Territory | <input type="checkbox"/> Other |

Are commissions split across multiple salespeople?

- Yes No

If Yes, please provide a description





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Commission Parameters:

What transaction types are commissions paid off of?

- | | |
|---|---|
| <input type="checkbox"/> Sales invoices (total invoice or at the sales line item level) | <input type="checkbox"/> AR invoice |
| <input type="checkbox"/> Sales order (total order or at the sales line item level) | <input type="checkbox"/> CRM opportunity |
| <input type="checkbox"/> Project invoice | <input type="checkbox"/> CRM quote tied to an opportunity |
| <input type="checkbox"/> Project task | <input type="checkbox"/> Contract Items |

Do you base commissions off of 'when invoiced' or 'when paid'?

- When Invoiced When Paid

Do you have any quota-based commissions?

- Yes No

If Yes, are they dollar-based or quantity based?

- Dollar-based Quantity-based

If Yes, are they driven by sales quotes and/or project quotes?

- Sales Quotes Project Quotes

Do salespeople receive bonuses?

- Yes No

If Yes, what is the parameter that drives the bonus?

Do salespeople receive draws?

- Yes No

Do you have a sales team compensation component used in determining a salesperson's total commission?

- Yes No

Are commission rates calculated on a sliding scale for each line item?

- Yes No





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Do you have quotas or milestones that a salesperson must meet in order to receive commission?

- Yes No

If Yes, please provide a description

What method(s) is used to calculate commissions?

- | | |
|--|--|
| <input type="checkbox"/> Percent of the margin amount | <input type="checkbox"/> Total quantity on the sales document (sales order or invoice) |
| <input type="checkbox"/> Percent of the sale amount | <input type="checkbox"/> Sales line item quantity |
| <input type="checkbox"/> Total amount of the sales document (sales order or invoice) | <input type="checkbox"/> Other |
| <input type="checkbox"/> Flat amount | |

Are commissions reduced by any of the following?

- | | |
|---|--|
| <input type="checkbox"/> Freight charges | <input type="checkbox"/> Only for commissions that are paid when the invoice is paid |
| <input type="checkbox"/> Trade discounts | • Terms discounts |
| <input type="checkbox"/> Credit card fees | • Write-offs |
| <input type="checkbox"/> Payment Terms | • Invoices unpaid number of days |

Do you apply adjustments to commissions?

- Yes No

If Yes, please provide a description





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Processing Commissions:

Are commissions paid weekly, biweekly, semimonthly, monthly, quarterly or annually?

When are commissions ready to be processed for payment?

- | | |
|---|--|
| <input type="checkbox"/> When the invoice is processed | <input type="checkbox"/> Both processed and fully paid |
| <input type="checkbox"/> When the invoice is fully paid | <input type="checkbox"/> Based on cash receipts (commissions are paid on partial payments) |

Do you have a commission approval process that routes calculated commissions to one or more people prior to the commissions being paid out?

- Yes No

If Yes, please provide a description

How are commissions paid to your salespeople?

- | | |
|--|---|
| <input type="checkbox"/> Accounts Payable | <input type="checkbox"/> Outsourced payroll service |
| <input type="checkbox"/> Acumatica Payroll | <input type="checkbox"/> Other |

What is your current process for calculating and paying commissions?

Provide a detailed description and examples of your commission structure (i.e. how it was presented to your salespeople and any documentation you can provide supporting this would be very helpful):

