

Employee Commissions (Pro)

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(Commissions are a feature of Managely Pro and Enterprise.)

The Commissions feature provides tracking for commissions owed on projects and work orders. This includes commission percentages set up on each employee who can collect commissions, which Managely uses to calculate how much is owed to them.

Managely offers flexibility in how commissions are calculated. This flexibility includes work order types, associated with a work order, that will determine if labor, materials, recurring, and non-recurring items are included in the calculated commission. Items added to work orders can be flagged as commissionable or non-commissionable in the item setup.

When using a work order type that is set for commissions on a work order, the contract field on the work order becomes required. The total commissionable recurring will consider the contract length associated with the work order or project.

To use commissions, set up the following: employee commission percentages; items that are commissionable; and work order types that are commissionable.

Employee commissions

Add commission percentages on employees (Setup > Company > Employees). Enter commission percentages on the Commissions tab: 0.1 equals 1% and 1 equals 100%. There are four commission percentages for residential customers and four for commercial customers.

	Residential	Commercial
Labor Percentage	1.0%	5.0%
Material Percentage	2.0%	6.0%
Recurring Percentage	3.0%	7.0%
Non Recurring Percentage	4.0%	8.0%

Commissionable Items

Create items marked as commissionable (**Is Commissionable?** is Yes) with a **Commission Type**, choosing labor, material, recurring, or non-recurring (Setup > Items & Parts > Items). The **Default Rate** is used to calculate the labor commission.

Edit Invoice Item
✕

Item Code • IWC

Description • item with labor commission type 31/150

Category ▼

Type ▼

Sub-Type ▼

Revenue GL • 41000 - Item ✕ ▼

Deferred Income 24000 - Deferred Revenue ✕ ▼

Default Rate \$40.00 ▲▼

Cost Amount \$15.00 ▲▼

Labor Units 1 ▲▼

Commission Type • Labor ▼

Is Commissionable? YES ?

Taxable NO ?

Recurring Item NO ?

Non-Deferred NO ?

✓ Save

✕ Cancel

You can create multiple items that are commissionable, each with a different **Commission Type**, and add them to a work order when needed.

Commissionable Work Order Types

Create work order types with any combination of labor, material, recurring, or non-recurring as commissionable (Setup > Operations > Work Order Types).

Edit Work Order Type [X]

Name • WOTWC4 [X]

Description WOT has all commission... [X]

Appointment Length (minutes) • 60 [▲ ▼]

Use Change Orders? NO

Use Job Costing? NO

Costing Method Direct Expense [▼]

Cost of Goods GL • 59000 - Misc COGS... [X ▼]

Alt Cost of Goods Amount [▲ ▼ ?]

Hold Back % • 0% [▲ ▼]

Labor Commissionable? YES

Materials Commissionable? YES

Recurring Commissionable? YES

Non-Recurring Commissionable? YES

Save Cancel

After creating the work order type, expand it by clicking the + beside the name. Click the Commissions tab. Click the **Edit** button. Click the **Utilize Commissions** switch to Yes, and select GL accounts for **Commission Expense** and **Commission Deferred**. Save the changes.

WOTWC4 like WOTWC but item IWC 60 Direct Expense [Edit] [Delete]

Tasks Items Parts Commissions Labor Phases

Utilize Commissions YES

Commission Expense 42200 - Commissions

Commission Deferred 21444 - Commission Deferred One

[Edit]

Commissionable Parts

Parts can be commissionable on work orders. When adding a part to a work order, click the part to edit it, and click the **Is Commissionable?** switch to Yes. This shows the commission amount on the part.

Part Description • part with commission

Location/Zone

Warehouse ZDEFAULT

Sales Tax Code • OHColumbus

Taxable? NO

Quantity • 1

Is Commissionable? YES

Rate • \$100.00

Labor Units • 1

Commission Amount	\$2.00
Amount	\$100.00
Total Labor	1
Part Cost	\$10.00
Total Cost	\$10.00

OK Cancel

The part **Commission Amount** is calculated using the employee's **Material Percentage** for residential or commercial customers and the **Rate** amount shown on the part. The rate defaults from the **Default Rate** field on the part. You can change the rate when you add the part to the work order without changing the rate on the part setup.

When you save the work order, Managely applies the commission; the commission is visible on the Work Order Commission tab.

Is Residential	Manual Commission	Employee	Labor	Material	Recurring	Non-Recurring	Manual Amount	Total Amount
<input checked="" type="checkbox"/>	<input type="radio"/>	WC: EE	\$0.40	\$5.00	\$0.00	\$0.00	\$0.00	\$3.40

On the Work Order Commission tab, the labor commission shown is calculated from the employee's **Labor Percentage** for residential or commercial customers and the value in the item's **Default Rate** field.

The material commission is calculated using the employee's **Material Percentage** for residential or commercial customers; the commissionable parts on the work order with the **Rate**; and any item on the work order that has a material **Commission Type** with the **Default Rate** (also on the item).

Recurring and Non-Recurring commissions are calculated in similar ways if they are on the work order.