

# Splitting Commission for More than Two Salesmen

## Step 1 - Set up a fake salesman number for the multi-salesman combo

**Salesman**

Salesman Number: 800

Salesman Name: Smith/Doe/Jones Team

Master Salesman Number: 601 John Smith

Telephone Number: (225) 292 - 7422 Ext. [ ]

FAX Number: (225) 291 - 0882 LD code: 3

E-mail address: sales@lakeshoregroup.com

Use this salesman number on orders/invoices

Sales included in reports for master salesman #601

Use this salesman number on orders and invoices.

If you want to see data on orders or invoices that use this combination along with orders and invoices reported under a salesman's regular number, use the salesman's regular salesman number as the Master Salesman Number.

If all the primary salesman's orders will use this combination of commissioned salesmen, set the master salesman number equal to the salesman number.

## Step 2 - Set up the commission basis for the multi-salesman salesman number.

Set up the time when commission is paid, etc. but leave the actual commission percentage as zero.

**Update Salesman's Commission Basis**

Salesman Number: 800 Smith/Doe/Jones Team

When is commission paid? Percentages must add up to 100%.  
When order is placed: 0 % When invoice is generated: 0 % When invoice is paid: 100 %  
Commission basis:  Sales Dollars  Profit Dollars  Discount code

Define any portion of profit reserved for house:  
Basis of calculations:  Specific \$  % of sales  % of gross profit  No house portion reserved

Commission calculation formula:  
Basis of ranges in table:  Accumulated Sales Dollars  Accumulated Profit Dollars  Profit Percentage on order/invoice

Commission table:

For Sales \$		Commission %	
From	.00	Max	
to			
From		Max	
to			

No commission percentage here

**Step 3 - When you are ready to pay commission, ask for a Commission to be Paid report in Excel format.**

Here is an example:

Salesman #	Salesman Name	Division	Order #	Adj #	Customer #	Customer Name	Date	Type	Source	Description	Sales	Cost	Gross Profit	GP %	Commission %	% Total	Commission Amount	
800	Smith/Doe/Jones Team	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	.0000	100	.00	
800	Smith/Doe/Jones Team	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	.0000	100	.00	
800	Smith/Doe/Jones Team	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	.0000	100	.00	
* Salesman Total *											1350	700	650	48.15				0

**Step 4 - Manipulate the resulting data to generate the split commission entries.**

1. Remove the Salesman Total line.
2. Highlight and copy all the lines except the heading.
3. Paste the copied lines as many times as you need to have one set of data for each salesman on the spreadsheet. It is suggested that you put one blank line between each set of data to keep them separated. You can remove those blank lines later.

Here's what our sample data looks like at this point:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
Salesman #	Salesman Name	Division	Order #	Adj #	Customer #	Customer Name	Date	Type	Source	Description	Sales	Cost	Gross Profit	GP %	Commission %	% Total	Commission Amount	
1	800	Smith/Doe/Jones Team	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	.0000	100	.00
3	800	Smith/Doe/Jones Team	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	.0000	100	.00
4	800	Smith/Doe/Jones Team	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	.0000	100	.00
5																		
6	800	Smith/Doe/Jones Team	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	.0000	100	.00
7	800	Smith/Doe/Jones Team	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	.0000	100	.00
8	800	Smith/Doe/Jones Team	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	.0000	100	.00
9																		
10	800	Smith/Doe/Jones Team	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	.0000	100	.00
11	800	Smith/Doe/Jones Team	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	.0000	100	.00
12	800	Smith/Doe/Jones Team	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	.0000	100	.00

4. Change the salesman number/name on each set of data (columns A and B).

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
Salesman #	Salesman Name	Division	Order #	Adj #	Customer #	Customer Name	Date	Type	Source	Description	Sales	Cost	Gross Profit	GP %	Commission %	% Total	Commission Amount	
1	601	John Smith	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	.0000	100	.00
2	601	John Smith	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	.0000	100	.00
4	601	John Smith	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	.0000	100	.00
5																		
6	602	Jane Doe	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	.0000	100	.00
7	602	Jane Doe	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	.0000	100	.00
8	602	Jane Doe	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	.0000	100	.00
9																		
10	603	Sam Jones	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	.0000	100	.00
11	603	Sam Jones	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	.0000	100	.00
12	603	Sam Jones	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	.0000	100	.00

5. Change the commission percentage (column Q) to the appropriate rate for each salesman.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
Salesman #	Salesman Name	Division	Order #	Adj #	Customer #	Customer Name	Date	Type	Source	Description	Sales	Cost	Gross Profit	GP %	Commission %	% Total	Commission Amount	
1	601	John Smith	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	40.0000	100	.00
3	601	John Smith	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	40.0000	100	.00
4	601	John Smith	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	40.0000	100	.00
5																		
6	602	Jane Doe	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	5.0000	100	.00
7	602	Jane Doe	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	5.0000	100	.00
8	602	Jane Doe	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	5.0000	100	.00
9																		
10	603	Sam Jones	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	1.0000	100	.00
11	603	Sam Jones	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	1.0000	100	.00
12	603	Sam Jones	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	1.0000	100	.00

6. Calculate the commission amount (column S) using an Excel formula.

If you are paying based on gross profit \$, then the formula you would type in Column S of row 2:

$$=N2*Q2/100$$

This is the formula used in the example.

If you are paying based on Sales, the formula would be

$$=L2*Q2/100$$

If you are paying based on gross profit \$ but only part of the commission at this point, the formula would be

$$=N2*(Q2/100)*(R2/100)$$

Copy cell S2 and paste in the other rows of the commission amount column.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	Salesman #	Salesman Name	Division	Order #	Adj #	Customer #	Customer Name	Date	Type	Source	Description	Sales	Cost	Gross Profit	GP %	Commission %	% Total	Commission Amount
2	601	John Smith	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	40.0000	100	20.00
3	601	John Smith	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	40.0000	100	200.00
4	601	John Smith	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	40.0000	100	40.00
5																		
6	602	Jane Doe	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	5.0000	100	2.50
7	602	Jane Doe	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	5.0000	100	25.00
8	602	Jane Doe	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	5.0000	100	5.00
9																		
10	603	Sam Jones	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	1.0000	100	.50
11	603	Sam Jones	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	1.0000	100	5.00
12	603	Sam Jones	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	1.0000	100	1.00

7. Remove the blank rows (row 5 and 9 on the example) and save your data.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Salesman #	Salesman Name	Division	Order #	Adj #	Customer #	Customer Name	Date	Type	Source	Description	Sales	Cost	Gross Profit	GP %	Commission %	% Total	Commission Amount	
2	601	John Smith	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	40.0000	100	20.00	
3	601	John Smith	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	40.0000	100	200.00	
4	601	John Smith	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	40.0000	100	40.00	
5	602	Jane Doe	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	5.0000	100	2.50	
6	602	Jane Doe	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	5.0000	100	25.00	
7	602	Jane Doe	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	5.0000	100	5.00	
8	603	Sam Jones	01	000000	141	100000	ATTENTION!	03/31/15	INV	Inv/Paid	INVOICE 011672	100.00	50.00	50.00	50.00	1.0000	100	.50	
9	603	Sam Jones	01	714612	1	100000	ATTENTION!	08/19/16	INV	Inv/Paid	INVOICE 011890	1000.00	500.00	500.00	50.00	1.0000	100	5.00	
10	603	Sam Jones	01	714613	1	100000	ATTENTION!	08/19/16	ADJ	Inv/Paid	INVOICE 011891	250.00	150.00	100.00	40.00	1.0000	100	1.00	

Note that when you save, do NOT put spaces or special characters in the file name. Those types of file names cause problems on the Linux server.

## Step 5 - Update the commission detail file from your Excel file.

Go to the Salesman Commission menu and pick the option “Update commission detail from a file”



### Update Commission data from file

File Name (full path):  [Upload file](#)

Type of file:  Tab-delimited text file  Excel

Number of heading lines:

Default Salesman Number:  (if not included in file)

Default date:  (if not included in file)

**Please note:**

- The default file layout below is the one used by the Commissions to be Paid report "Excel" option. If you are loading from a different layout, [click here](#) to clear the data fields so you can enter your own layout.
- If the Salesman Number, Order Number, and Record Sequence combination match a record already on file, the existing record will be updated. If there is no match, a new record will be added.

Column on S/S	Data field	Column on S/S	Data field	Column on S/S	Data field
A	6467 Salesman Number	AA		BA	
B		AB		BB	
C		AC		BC	
D	4208 Order Number	AD		BD	
E	6010 Record Sequence	AE		BE	
F	0650 Customer Number	AF		BF	
G		AG		BG	
H	1114 Date Of Transaction	AH		BH	
I	7488 Type Transaction	AI		BI	
J	0560 Commission Origin Code	AJ		BJ	
K	6000 Reason	AK		BK	
L	0552 Commission Basis - Sales	AL		BL	
M	0550 Commission Basis - Cost	AM		BM	
N		AN		BN	
O		AO		BO	
P		AP		BP	
Q	0670 Commission Percent	AQ		BQ	
R	0564 Commission Percent Applied	AR		BR	
S	0549 Commission Amount	AS		BS	
T		AT		BT	
U		AU		BU	
V		AV		BV	
W		AW		BW	
X		AX		BX	
Y		AY		BY	
Z		AZ		BZ	

Submit
Reset
Exit

Click on the “Upload file” link and upload the Excel file you just created to the server. Change the “Type of file” to “Excel”. That’s the only changes you need to make to the screen. The data fields are already set up for you.