

# Commission & Rebate Checklist

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## **Contact Information**

Name: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I am a

Potential user

Reseller

## **Accounting System**

Microsoft Dynamics GP

Sage Accpac ERP

Sage MAS 90/200

Macola Progression

Macola ES

Other \_\_\_\_\_

## **Payment Amount Rules**

Please check all rules you use to compute the amount to pay. Attach another sheet or add comments below if that helps explain your rules.

### Rates Based On

- Product
  - ID
  - Group
- Salesperson
  - ID
  - Group
- Customer
  - ID
  - Group
- Price or discount
- Date (e.g. Was a marketing promotion in effect?)
- Special rate for trade shows
- Timeliness of customer payment
- Spiffs
  - for new customers
  - for other reasons. Please describe.

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### Other Rate Rules, Except Quotas and Tiers

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Quotas or Rate Tiers

We use quotas or rate tiers, defined as follows.

Time period for computing achievement

- Calendar year
- Current quarter
- Current month

Using

- A single quota
- Multiple rates depending on achievement level
- Separate quota amounts for different products
- Separate quota amounts for different customers

Achievement is based on date

- Of invoice
- Full payment was received
- Partial payment was received

Achievement amount is based on

- Sales (i.e. revenue)
- Profit
- Other \_\_\_\_\_

Quota or tier target is based on comparison with prior period

Other quota or tier rules.

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Base Amount (Achievement)

The rate described above will be multiplied by the achievement described below to compute the payment.

Revenue

Profit

As shown on the accounting system order or invoice

Computed or adjusted as follows: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Quantity sold

Number of units on invoice line

Number of units on order

Package size

Other. Please describe.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Other Achievement Rules

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Recipients**

Commissions

- Internal salespeople employed by the company
- External salespeople employed by the company
- Independent representatives
- Managers
- Support personnel
- Other \_\_\_\_\_

- Recipients and commission splits are on invoices.
- Recipients and commission splits are not on invoices.  
Please describe how they are determined.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Sales Rebates

- Customers
- Parent companies
- Buying groups
- Other \_\_\_\_\_

**Commission & Rebate Timing**

When is commission or rebate paid?

- On receipt of full payment from the customer
- On receipt of partial payment from the customer
- On invoicing
  - Charge back if payment is late
  - Charge back if the receivable is written off
- When milestones are reached. (i.e. The payment is divided into parts which are due at different times during the sales and performance cycle.) Please describe.

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- Other. Please describe.

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When is commission expense accrued?

- Invoice date
- We do not accrue commission expense
- Other \_\_\_\_\_

**Other**

Please add any additional comments, descriptions, or questions which will help define your plan. Feel free to attach spreadsheets, existing reports, etc.

If your plan is hard to describe in writing or if this written description requires clarification, please call Flaum Technologies Inc. at 888-962-6667 x22 to arrange a discussion with one of our technical consultants.