

FieldEdge PREMIER

Performance Pay

Performance Pay helps you track SPIFFs and Commissions for your employees. Assign SPIFFs to your items, and control commissionable sales right from the quote or invoice. New reports allow you to track these SPIFFs and Commissions for payroll.

What are SPIFFs and Commissions?

SPIFFs

Provide your employees with extra incentive to sell certain items. SPIFFs can be either a percentage of the item price, or a flat dollar amount.

Commisions

Offer employees a certain percentage of sales or gross profit using Commissions. Commissionable items will be included in the Performance Pay section of the invoice.

The Setup

Commissions

Commissions will be enabled for all items by default. To disable commissions for an item, uncheck the **Commission** box in the Performance Pay settings for that item. Employees will need the permission to view Invoice Profitability if reporting by Gross Profit.

SPIFFs

To enable SPIFFs, open the Performance Pay settings for an item and check the **SPIFFs** box. From here, choose either **Fixed Dollar Amount** or **Percentage Amount** and set the values you'd like.

Performance Pay

Select whether you would like to enable SPIFFs, Commission, or both for this item.

Select Performance Pay Types

☐ SPIFFs

☒ Commission

Save

Performance Pay

Select whether you would like to enable SPIFFs, Commission, or both for this item.

Select Performance Pay Types

☒ SPIFFs

☐ Commission

Select pay type

☒ Fixed dollar amount

☐ Percentage amount

\$

25.00

Save

Agreements

To enable commissions on service agreements, open an Agreement and set the **Assign Commissions** option to **Yes**. Below, add one or more employees to receive Commission credit for this agreement. The allocation must total 100%.

Customer: Ostrozynski, Jan

Agreement Details

Agreement Number *

10206

Plan Name *

Silver - N

Address

2030 Flamingo Dr
North Fort Myers, FL33917

Contract Date *

04/04/2017

Commissions ⓘ

Assign Commissions ☐ No ☒ Yes

Employee

Ben H.

50

%

ⓧ

Ryan Y.

50

%

ⓧ


+ Add another employee for commissions

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Performance Pay


Invoicing

When adding a Performance Pay enabled item to an invoice or quote, SPIFFs and Commissions will be displayed at the bottom of the invoice. SPIFFs will automatically associate to the user that added the item, and Commissions will associate to the Sales Rep on the invoice.

Performance Pay 


✓ SPIFFs


Ben H. | \$5.00

✓ Commissions: \$40.31 total amount; \$31.45 total estimated profit 

Adam M. | 100%


Editing Performance Pay on an invoice

To edit SPIFFs or Commissions on an invoice, click the **Edit**  button in the Performance Pay section of the invoice. The assigned employee for a SPIFF can be edited, and additional commissionable employees can be added. When editing Commissions, the allocation must total 100%.

Performance Pay 

Choose the employees that should receive a SPIFF on enabled items and what employee(s) should receive credit for the commissionable amount of the invoice.

SPIFFs


Item	Qty	Total SPIFF Amount	Assigned Employee
2MDR3	1	\$5.00	<div>Ben H. </div>

Commissions

\$40.31 total amount | \$31.45 total estimated profit

✓ SHOW COMMISSIONABLE ITEMS


Employee

Adam M. 

Allocation

100

%

 Add another employee for commissions

Save

Reporting

SPIFF Reporting

Use the **SPIFF Report** to view sold items that are eligible for SPIFFs. The total of all SPIFFs per employee will be displayed by default, but you can also filter to only show Paid Invoices.

▼ Ben H.

INVOICE DATE ▼	INVOICE	PAID OFF DATE	ITEM	QUANTITY	SPIFF VALUE	SPIFF TYPE	TOTAL	CLASS
08/21/2020	I1012	09/17/2020	2MDR3	1	5	Fixed	5.00	Fort Myers:HVAC
08/26/2020	I1025		GM62465-KP4-QS	1	5	Percentage	20.85	Fort Myers:HVA...
							\$25.85	

Commission Reporting

Use the **Commission Report** to view sold items that are eligible for commissions. The total commissionable revenue and profit per employee will be displayed by default, but you can also filter to only show Paid Invoices.

▼ Ben H.

INVOICE DATE ▼	INVOICE	PAID OFF DATE	WORK ORDER	ALLOCATION	REVENUE	ALLOCATED REVENUE	EST. PROFIT	ALLOCATED EST. PROFIT
08/21/2020	I1012		1066	100%	6,385.00	6,385.00	2,553.57	2,553.57
08/26/2020	I1025		1078	100%	417.00	417.00	166.80	166.80
						\$6,802.00		\$2,720.37