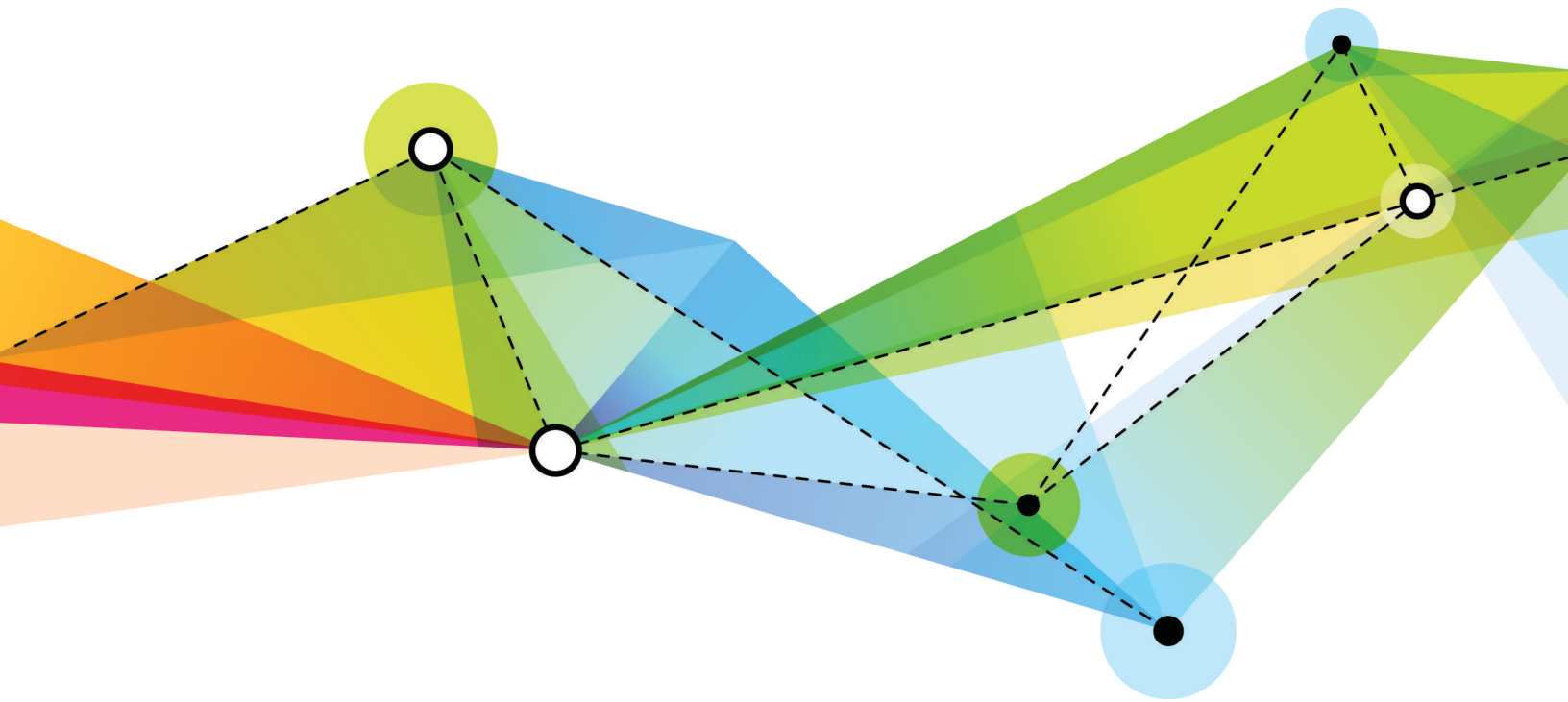




Commissions in Smile

Quick Reference Guide



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Suite 801, 620 Bourke St, Melbourne, Vic 3000, Australia

www.inomial.com • +61 3 9663 3554 • sales@inomial.com • support@inomial.com

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Chapter 1

Commissions overview

Commissions overview

A commission is a fee paid to a third party who sells products on your behalf. In Smile, you can pay commission on accounts, subscriptions and charge types. Smile supports leading commission and trailing commission types.

Smile uses three entities to manage commissions:

- **commission earners**—represent a person who is paid commission.
- **commission structures**—specify the commission rates that you pay to a commission earner.
- **agents**—associate a commission structure with a commission earner.

Each agent contains one or more commission earners, and each commission earner is associated with a commission structure. Agents let you easily assign multiple commission earners to the same account or subscription.

The following diagram shows the relationship between agents, commission earners, accounts and subscriptions.

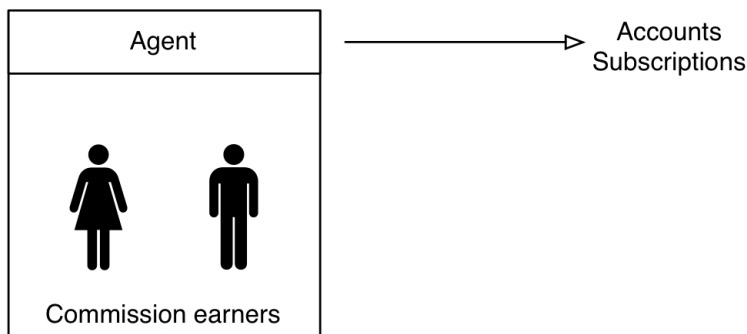


Figure 1: Agents and commission earners

Example: Agents, commission earners and commission structures

This example shows you how to use agents, commission earners and commission structures to set up a common commission scenario.

Ben and Susan work in the sales team at Example Telecom. Susan is Ben's manager, and Susan and Ben are both salespeople. When a salesperson signs up a new customer, they receive a 10% commission and their manager receives a 2% commission.

To set up this scenario in Smile, do the following:

- Create an agent for Ben, add Ben as a commission earner with a 10% commission structure and add Susan as a commission earner with a 2% commission structure. Add the Ben agent to any subscription that Ben sells. Both Ben and Susan now receive commission on each sale that Ben makes.
- Create an agent for Susan and add Susan as a commission earner with a 10% commission structure. Add the Susan agent to any subscription that Susan sells. Susan now earns commission on each sale that she makes.

The following diagram shows you the commission earners in each agent.

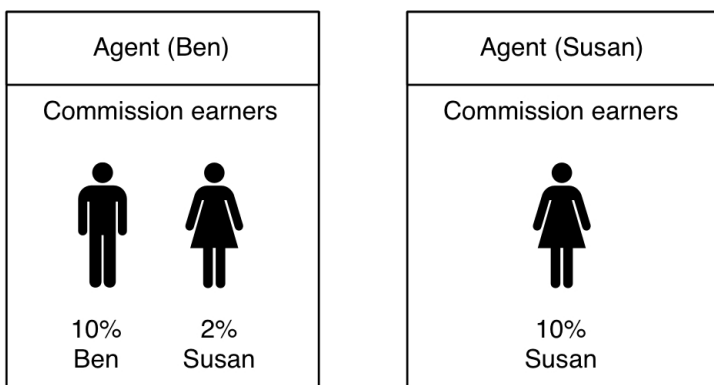


Figure 2: Agents for Susan and Ben

Commission types

Smile supports two types of commission:

- **leading commissions**—one-off commission payments that are raised when an account or subscription is created.
- **trailing commissions**—recurring commission payments calculated on the value of account or subscription usage.

Commission can be paid as either a percentage of value or as a flat fee. For example, you may pay a leading commission of \$50 when a salesperson sells a two-year mobile phone contract, then pay a 2% trailing commission on the value of each phone call made throughout the contract period.

You can assign a commission to an account or subscription. If you assign a commission to an account, the commission also applies to each of the account's subscriptions.

You can also assign a commission to a specific charge type on an account or subscription, or exclude a charge type from commission. For example, you can pay a 2% trailing commission only on international calls.

Recipient created tax invoices

Smile uses recipient created tax invoices (RCTIs) to track the commission due to each commission earner. An RCTI is an invoice to your company from a commission earner requesting payment. To simplify your accounting, Smile generates RCTIs on behalf of commission earners during the billing run.

Smile treats commission earners as a special type of subscription. Each commission earner must be assigned to a commission account. You can add multiple commission earners to the same commission account.

Smile creates RCTIs during the billing run. Because Smile only raises invoices against accounts, each RCTI includes the commission due to each commission earner on an account.

An RCTI may need to contain specific information to be valid for taxation purposes. When you create RCTI stationery, ensure the stationery includes all necessary information to comply with your country's taxation requirements.

Note: For more information about stationery, see the *Configuration Guide*.

How commissions are calculated

Smile calculates commission on the pre-tax value of a charge and raises commission only on the value of payments made against an invoice, not the total value of an invoice. For example, a \$100 invoice that contains 10% GST was settled with a \$70 cash payment and a \$30 credit note. Smile raises commission on the pre-tax value of the \$70 payment, that is, calculates the commission due on \$63.

If you de-allocate a receipt from an invoice on which commission was paid, Smile recalculates the commission in the next billing run and lists any overpayments on the RCTI. The recalculation is known as clawback.

When commissions are paid

Smile creates RCTIs during the billing run, based on the invoicing cycle of the commission earner. An RCTI includes the commission payments due to each commission earner on the account with an invoicing cycle that ends on the date of the billing run.

Smile does not raise a commission on a charge until all of the following have occurred:

- the charge is listed on an invoice
- the invoice is fully paid
- the commission payment delay has elapsed

The commission payment delay is the period of time between when the invoice is fully paid and the commission is raised. This delay ensures that you do not pay commission on invalid payments, for example, bounced cheques. You can configure the length of the commission payment delay to suit your business needs.

The following example shows you when commission is paid for an invoice raised on 20 May. After the invoice is paid in full on 15 June, Smile begins the commission payment delay. In this example the commission payment delay is 28 days. The commission payment delay finishes on 13 July, and the commission is now eligible for payment. The commission earner's invoicing period ends on 31 July, and Smile includes the commission payment in the RCTI for this period.

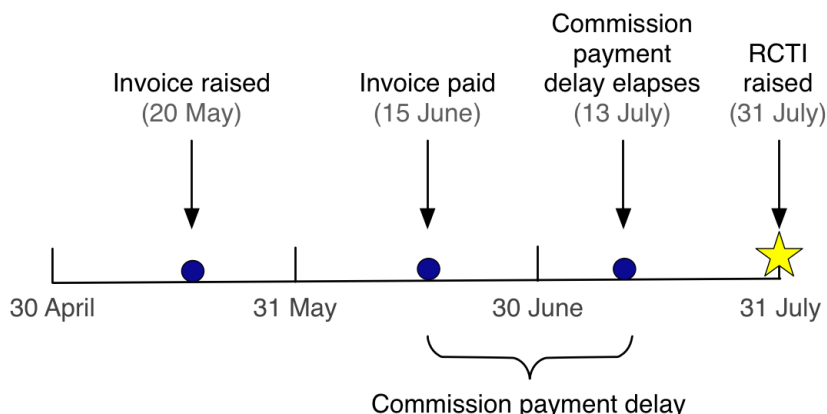


Figure 3: Example: When commissions are paid

After you generate an RCTI, the commission account has a positive balance because you owe commission to the commission earners on the commission account. To ensure the account balance remains up-to-date after you make a commission payment, raise a debit note for the value of the payment and allocate it to the RCTI. Raising a debit note ensures that the account balance always correctly reflects the amount due to the commission earners on the commission account.

Search

The global **Search** field lets you search for accounts, subscriptions, invoices and receipts, and lets you locate customer information in Smile.

The following table lists the terms you can use in the **Search** field.

Table 1: Search terms for each search type

Search type	Search term
Account	<ul style="list-style-type: none"> • Contact name • Phone numbers • Address details • USN (unique subscription number)
Subscription	<ul style="list-style-type: none"> • Username • Past usernames • USN
Invoice	Invoice number
Receipt	Receipt number

A USN, or unique subscription number, uniquely identifies each account and subscription in your company.

This task explains how to search for an account, subscription, invoice or receipt.

1. Do one of the following:


- Click in the **Search** field on the Smile Menu Bar.
- Press **ALT+S** or **CMD+S**.¹
- On the **Smile** menu, click **Find Customer**.

The **Search** window is displayed. The most recent previous search results are displayed by default. Double-click a previous result entry to select it.

2. Type your search term in the **Search** field and press **Enter**.

A list of results that match your search term appears.

3. Do one of the following:

- Double-click the required entry in the search results.
- Select the required entry, then click the  icon.
- Right-mouse click on the required entry and click **View**.

Detail of the search result is displayed.

¹ Your operating system or browser may override these key-combinations.

Chapter

2

Create a commission

Create a commission

Creating a commission lets you make commission payments to commission earners. This task explains how to create a commission with a single earner and structure.

1. [Create a commission earner.](#)

A commission earner is a person who is paid commission.

2. [Create a commission structure.](#)

A commission structure specifies the commission rates you pay.

3. [Create an agent.](#)

An agent associates a commission structure with a commission earner.

4. [Assign an agent to an account or subscription.](#)

The agent now earns commission on the account or subscription.

Create a commission with multiple commission earners

Creating a commission lets you make commission payments to commission earners. This task explains how to create a commission with multiple commission earners.

1. [Create a commission earner.](#)

A commission earner is a person who is paid commission.

2. [Create a commission structure.](#)

A commission structure specifies the commission rates you pay.

3. [Create a commission earner.](#)

Create another commission earner.

4. [Create a commission structure.](#)

Create a new commission structure if the earner has a different commission rate. Repeat step 3 and 4 for all commission earners and structures.

5. [Create an agent.](#)

An agent associates a commission structure with a commission earner. Add all commission earners and commission structures.

6. [Assign an agent to an account or subscription.](#)

The agent now earns commission on the account or subscription.

Create a commission earner

A commission earner represents a person who is paid commission. Smile treats commission earners as a special type of subscription, so each commission earner must be associated with a commission account.

Note: Before you create your first commission earner, [contact Inomial](#) for more information about configuring the commission earner service.

This task explains how to create a commission earner.

1. [Search](#) for the commission account to add the commission earner to, then double-click the commission account entry in the search results.

The Account summary page is displayed.

2. On the **Account** menu, click **Add Subscription**.

The Place Order page is displayed.

3. Click **Select** next to the commission earner package entry.

The Commission earner page is displayed.

4. Complete the following fields:

- **Name**—Specifies the name of the commission earner.
- **Service start date**—(Optional) Specifies the date the commission earner starts earning commission.
- **Service end date**—(Optional) Specifies the date the commission earner stops earning commission.

5. Click **Continue**.

Smile creates the commission earner and returns to the commission Account summary page.

Create a commission structure

A commission structure specifies the commission rates that you pay to commission earners. You can create a commission structure that assigns commission to accounts, subscriptions or a specific charge type, for example, a sign-up bonus or international calls.

When you create a commission structure, ensure that you create a default rule for the commission raised on any charge type on any service, even if that commission is \$0. Smile uses this default rule for processing purposes.

To create a commission structure for a leading commission, ensure that the initial invoice contains a line item that triggers the commission payment. For example, to pay a leading commission on a service that does not have a setup charge, create a \$0 setup fee for the service that is not printed on the invoice. After you create the setup fee, create a commission structure that pays commission on the setup charge.

This task explains how to create a commission structure.

1. On the **Smile menu, click **Configuration**.**

The Configuration and Tools page is displayed.

2. Under **User Management, click **Commissions**.**

The Commission Configuration page is displayed.

3. Click **New Commission Structure.**

The Commission Configuration page is displayed.

4. Complete the following fields:

- **Name**—Specifies the name of the commission structure.
- **Commission payment delay**—Specifies the period of time between when the invoice is paid and the commission is raised.
- **Commissions are paid for**—Specifies the length of time to pay commission after the account or subscription is created. If you leave this field blank, Smile pays commission indefinitely.

5. (Optional) Tick the **Only pay commissions to subscriptions on contracts checkbox.**

If you select this option, Smile pays commissions only on accounts or subscriptions that are under contract. The commission ends when the contract ends.

6. Click **New rate.**

The Commission Service page is displayed. This page lets you define a commission rule.

7. Select the service to apply the commission to in the **Service drop-down, and click **New charge type commission rate**.**

For example, select **Any service** to create a default rule for every service.

The Commission Rate page is displayed.

8. Complete the fields on this page. The following field names require additional explanation:

- **Invoice display order**—Specifies the order in which the commission rate is displayed on the RCTI. The commission rate with the lowest invoice display order number is displayed at the top of the RCTI.
- **Invoice description**—Specifies the commission rate text that appears on the RCTI.
- **Sales report category**—Specifies the sales report category that the commission rate is assigned to.
- **Discount/commission category**—Specifies the sales report category of the invoice item the commission is raised against.

Note: To raise a commission for a sign-up bonus, select **Setup charge** from the **Charge type** drop-down. To create a default rule for all charge types, select **All charge types** from the **Charge type** drop-down.

9. Click **Save**.

Smile returns to the Commission Service page.

10. Repeat Steps 7-9 for each charge type you want to add to the commission, then click **Save**.

The Commission Configuration page is displayed.

11. Click **Save**.

The Commission Configuration page is displayed. You can now assign the commission structure to an agent.

Create an agent

An agent associates a commission earner with a commission structure.

This task explains how to create an agent.

1. On the **Smile** menu, click **Configuration**.

The Configuration and Tools page is displayed.

2. Under **User Management**, click **Commissions**.

The Commission Configuration page is displayed.

3. Click **New Agent**.

The Agent page is displayed.

4. Type the name of the new agent in the **Name** field.

5. (Optional) Enter the dates from which the agent can earn commission in the **Valid from** and **Valid to** fields.

The dates in these fields do not affect commission calculations, but instead let you filter inactive agents from a displayed list of agents.

6. Add a commission earner to the agent, as follows:

a. Click **New Commission Earner**.

The Commission Earner page is displayed.

b. Click **Search** next to the **Commission earner** field, search for the name of the commission earner, then click **Select** next to the commission earner in the search results.

The **Name** column of the search results specifies the commission account name for each commission earner. If the account contains many commission earners, use the USN to identify each commission earner.

c. Select the commission structure to apply to the commission earner in the **Earns commission** drop-down, and click **Save**.

Smile adds the commission earner to the agent. The Agent page is displayed.

7. Repeat Step 6 to add more commission earners to the agent.

8. Click **Save**.

Smile creates the agent. You can now assign the agent to accounts and subscriptions.



Attention: If an agent will have multiple commission earners, add the additional earners before assigning the agent to accounts or subscriptions. When you add an agent to an account or subscription only the current commission earners that are members of the agent will receive commission. If additional commission earners are added to an agent the new earners will only receive commission from accounts or subscriptions that the agent is added to after that point in time.

Assign an agent to an account or subscription

After you assign an agent to an account or subscription, the commission earners associated with the agent earn commission on the account or subscription.

If you assign an agent to an account, the commission earners associated with the agent also earn commission on each of the account's subscriptions. If an account is set as a bill-to account the account commission will not be applied to these additional invoices.



DANGER: When you add an agent to an account or subscription only the current commission earners that are members of the agent will receive commission. If additional commission earners are added to an agent the new earners will only receive commission from accounts or subscriptions that the agent is added to after that point in time.

This task explains how to assign an agent to an account or subscription.

1. [Search](#) for the account or subscription to assign the agent to, then double-click the account or subscription entry in the search results.

The Account summary page is displayed for an account result or the subscription summary page is displayed for a subscription result.

2. Do one of the following:

<p>To assign an agent to an account</p>	<ol style="list-style-type: none"> 1. On the Account Menu Tree, click the ► to the left of Account, then click Commissions. 2. Click Add.
<p>To assign an agent to a subscription</p>	<ol style="list-style-type: none"> 1. Click Add next to the Agents field.

The **Add Agent** window is displayed.

3. Select the agent in the **Agent** drop-down, optionally specify a date in the **Don't pay commission before** field, and click **Add**.

Note: If no date is set then the commission will apply from the start date of the account or subscription. Smile will generate past commission if applicable.

Smile assigns the agent to the account or subscription.

Chapter

3

View commission Information

View commission information

The following table explains how to view different types of commission information.

Table 2: Viewing commission information

Commission information	Method
All commission payments made in a reporting period	View the All Sales report
Commission paid on a specific invoice	View the Commissions page of an invoice
All commissions earned by a commission earner	View commission earner history
All accounts and subscriptions on which a commission earner is paid commission	View commission earner subscriptions
All commissions raised against an account	View commissions for an account

View commission earner history

Viewing commission earner history lets you view information about past and pending commission payments to a commission earner. Commission earner payments are divided into three categories:

- **commissions waiting for invoice payment**—commissions associated with unpaid invoices.
- **unpaid commissions**—commissions that are scheduled for payment.
- **commissions raised**—commissions for which Smile has raised an RCTI.

Note that Smile does not pay commission on unpaid invoices.

This task explains how to view commission earner history.

1. [Search](#) for the commission account with which the commission earner is associated, then double-click the commission account entry in the search results.
The Account summary page is displayed.
2. On the Account Menu Tree, click **Subscriptions**, then double-click the commission earner subscription entry in the **Subscriptions** list.
The subscription's summary page appears and displays a summary of the commission history.

3. To view more information about an invoice or RCTI, do one of the following:
 - Click **Invoice** next to a payment to view information about the invoice on which a commission was raised.
 - Click **RCTI** next to a payment to view information about the commission that was raised on an invoice.

View commission earner subscriptions

Viewing commission earner subscriptions lets you view information about the accounts and subscriptions on which a commission earner is paid commission.

This task explains how to view commission earner subscriptions.

1. **Search** for the commission account with which the commission earner is associated, then double-click the commission account entry in the search results.
The Account summary page is displayed.
2. On the Account Menu Tree, click **Subscriptions**, then double-click the relevant subscription entry.
The subscription's summary page appears and displays a summary of each invoice that has raised a commission for the commission earner.
3. On the Account Menu Tree, click the ► to the left of the commission earner subscription entry to expand the subscription options, then click **Subscriptions**.
The Subscriptions page appears and displays the accounts and subscriptions on which the commission earner is paid commission.

View commissions for an account

Viewing commission for an account lets you view information about the commission payments raised against each of the account's invoices. Commissions on the account may be paid to more than one commission earner.

This task explains how to view commission for an account.

1. **Search** for the account, then double-click the account entry in the search results.
The Account summary page is displayed.
2. On the Account Menu Tree, click the ► to the left of **Account** to expand the account options, then click **Commissions**.
The Commissions page appears and lists the commission paid on each invoice raised against the account.
3. Click **Invoice** next to a commission entry to view more detailed information about the invoice.

Chapter

4

Change or end a commission

Change or end a commission

Making changes to your commission configuration can potentially result in unexpected results that could take considerable manual intervention to rollback.

Take extra care when making changes, especially in the following areas:

- When you add an agent to an account or subscription only the current commission earners that are members of the agent will receive commission. If additional commission earners are added to an agent the new earners will only receive commission from accounts or subscriptions that the agent is added to after that point in time.
- If no start date is specified when assigning an agent to an account or subscription then the commission will apply from the start date of the account or subscription. Smile will automatically generate past commission if applicable.
- Changing the commission rate in an existing commission structure will result in Smile automatically recalculating the commission for all current and previous commission earnings. Create a new structure and set an end date on the agents assigned the previous structure.
- When ending an assigned commission set an end date to ensure commission earners receive the correct commission. Smile does not calculate commission on unpaid invoices after an agent or commission earner is deleted.
- Smile will recalculate commission amounts if invoice items are deleted. Manually deleting RCTI entries may result in accounting errors in Smile.

Change a commission rate

From time to time you may want to change the commission rates of your commission earners. To achieve this you create a new commission structure and agent and set an end date for the commission rate being changed.



DANGER: Do not change the commission rate in an existing commission structure as Smile will automatically re-calculate the commission for all current and previous commission earnings.

This task explains how to apply a new commission rate.

1. [Create a new commission structure.](#)

The new structure defines the new commission rate.

2. Create a new agent.

The new agent associates commission earners with the new commission structure.

3. Click **View next to the agent entry that is being ended.**

The **Agent** page is displayed.

4. Enter a date in the **Valid to field, and click **Save**.**

At the specified date this agent will no longer be selectable. It does not end the agent itself.

The date is saved and the Commission Configuration page is displayed.

5. [View commission earner subscriptions](#).**6. Click **Edit** next to an account or subscription with the old agent and commission rate.**

A subscription commission window is displayed.

7. Enter an end date in the **Don't pay commissions on invoices after field. Click **Save**.**

The Subscriptions page is displayed and the date is displayed in the **Ends** column.

8. Repeat steps 6-7 for each account and subscription that you want to end commission on.**9. Take note of the account and subscription numbers you just set end dates for.****10. [Search](#) for the account or subscription to assign the new agent to, then double-click the account or subscription entry in the search results.**

The Account summary page is displayed for an account result or the subscription summary page is displayed for a subscription result.

11. Do one of the following:

To assign an agent to an account	<ol style="list-style-type: none"> 1. On the Account Menu Tree, click the ► to the left of Account, then click Commissions. 2. Click Add.
To assign an agent to a subscription	<ol style="list-style-type: none"> 1. Click Add next to the Agents field.

The **Add Agent** window is displayed.

12. Select the new agent in the **Agent drop-down, and specify a date in the **Don't pay commission before** field, and click **Add**.**

Smile assigns the agent to the account or subscription.

13. Repeat step 10-12 to assign the new agent to each account or subscription.

Remove an agent from an account or subscription

Removing an agent from an account or subscription stops any commission earners associated with the agent from earning commission on that account or subscription.

This task explains how to remove an agent from an account or subscription.

1. [Search](#) for the account or subscription to remove the agent from, then double-click the account or subscription entry in the search results.

The Account summary page is displayed for an account result, or the Subscription summary page is displayed for a subscription result.

2. Do one of the following:

<p>To remove an agent from an account</p>	<ol style="list-style-type: none"> 1. On the Account Menu Tree, click the ► to the left of Account, then click Commissions. 2. Click Edit next to the relevant agent. 3. Enter the date to stop paying commission in the Don't pay commissions on invoices after field, then click Save. 4. Click Continue.
<p>To remove an agent from a subscription</p>	<ol style="list-style-type: none"> 1. Click View next to the Agents field. 2. Click Edit next to the agent entry. 3. Enter the date to stop paying commission in the Don't pay commissions on invoices after field, then click Save. <p>Note: If only Account is displayed next to the agent entry in step 2 then the commission was set at the account level. Follow the instructions to remove an agent from an account.</p>

Note: If you end date a commission prior to commission already paid Smile will debit the commission earner.

End a commission

When you end a commission, you stop a commission earner from earning commission on invoices raised after a specified date. Smile pays commission on any invoices raised before this date, even if the payment date is later than the commission end date.



Warning: To ensure commission earners receive the correct commission, do not delete an agent or a commission earner. Smile does not calculate commission on unpaid invoices after an agent or commission earner is deleted.

This task explains how to end a commission.

1. **Search** for the commission account with which the commission earner is associated, then double-click the commission account entry in the search results.

The Account summary page is displayed.

2. On the Account Menu Tree, click **Subscriptions**, then double-click the relevant commission earner subscription entry.

The subscription's summary page is displayed.

3. On the Account Menu Tree, click the ► to the left of commission earner subscription to expand the subscription options, then click **Subscriptions**.

The Subscriptions page appears and lists commissions the agent is associated with.

4. Click **Edit** next to the commission you want to stop paying.

The **Commission** window is displayed.

5. Enter the date to stop paying commission in the **Don't pay commissions on invoices after** field, then click **Save**.

Smile ends the commission on the specified date.

Note: To stop all commissions for a commission earner, repeat steps 4-5 for all entries in their Subscriptions list.