

# Sales Commissioning, Pay Plans and Gross Profit

## Worksheets Designed for the Automotive Dealership

These Excel® commission spreadsheets are designed for both the Variable Sales Department Manager and the Accounting Staff which must monitor Vehicle Sales Commissioning, Gross Profit, Finance & Insurance Income and Payout Percentages on both New and Used Vehicle Sales.

They accurately calculate multiple sales pay plan options while generating **in-depth management, vehicle sales gross profit analysis reports**.

It may at first appear that these spreadsheets micro-manage the commissioning of vehicle sales, but due to the fact that this Variable Selling Expense tends to be an auto dealership's largest expenditure it is a necessity if profitability and expenses are to be maintained.

### Key objectives of this Excel workbook;

Provide a structured, efficient, accuracy driven approach for commissioning vehicles sales personnel  
Simplify the sales commissioning process while micro-managing both each salesperson and vehicle sales  
Combine both the payroll preparation of commission worksheets with a management gross profit analysis report  
Provide a time-saving, user-friendly, dealership auditing and management tool for maintaining expenses and profitability  
Make available multiple sales commissioning pay plan options which are manageable and designed to motivate sales personnel.

### Some of the Spreadsheet calculations per Salesperson;

Actual New & Used Vehicle Sales Gross Profit  
Actual Aftermarket, Financial & Insurance Gross Profit  
**Total Gross Profit Percentage Payout in Commissions**  
Total Units Sales, Commissionable Gross, Salary and Draws

## General Spreadsheet Usage Instructions

**Color Coding** is utilized to simplify the usage of these spreadsheets. The only fields-cells that a user may input data are **YELLOW** in color, while all remaining cells are self-calculating. Forms buttons allow easy access to each and every sales commission worksheet. Tracks up to 20 unit sales per salesperson, including finance commissions and bonuses. Easily resets for the following month with the click of a button without requiring the re-entry of salesperson information and standardized pay plan structures.

### To Begin using these Spreadsheet;

- 1). Access the Main Menu by clicking on the above forms button.
- 2). Read the simple self-explanatory directions for setting-up the Default Commissioning Main Menu worksheet
- 3). Enter the required start-up data such as Salespersons Name, Payroll Periods and the Percentages paid on commissionable gross
- 4). Save your newly created Excel commissioning workbook.
- 5). Click on the forms button next to a Salespersons name and enter your sales - commissioning transaction information.

**You now have a functional Commissioning workbook .....**

**Important .... First time users, manually verify that the commissioning sheets are correctly calculating your desired values.**

## Commission Spreadsheet Heading Descriptions

### 1). Flat Commission

Within this column enter the Fixed Dollar Amount which you would like to pay a salesperson for selling a specific vehicle.

Be sure to enter the flat dollar commission value within the proper sale column of either NEW or USED vehicle.

**Special Note:** Flat Dollar Amount Commissions paid can be used in conjunction with a commissionable gross profit entry.

### 2). Commissionable Gross

Enter within this column the calculated in-house vehicle sales commissionable gross which you would pay the salesperson for selling a specific vehicle. Again, be sure to enter the commissionable gross value within the proper column, either NEW or USED.

Enter a zero value if commissionable gross is a negative amount and you do not want to penalize the salesperson by reducing the total commissionable gross value used when calculating Base Level % of Commissionable Gross Profit or Plateau Bonuses based on commissionable gross.

**Special Note:** Flat Dollar Amount Commissions paid can be used in conjunction with a commissionable gross profit entry.

**Commission Charge-Backs:** If for whatever reason you must chargeback a salesperson on a previously calculated and paid-on commissionable gross, enter a Negative Commissionable Gross value in the New or Used column reducing commissions due.

As for **unit count**, vehicle sales payout percentages are usually calculated on the entry column, New or Used. As for Finance Income, commission expense distributions are based on the New or Used unit count. If entering a F & I chargeback, enter a unit count sales value under new or used equal to .0001. This minimal value will not effect total unit sales count, but will allocate the dollar value entry.

**On a Personnel Note - Commission Charge-Backs:** After commissioning auto sales for many decades it has been concluded a charge-back usually occurs for a reason. That being, the value of the charge-back could of easily have put that individual within a different percentage payout range. Thus costing the dealership not just the % of gross profit payout, but also an across the board-overall increase in the % payout or a flat commissionable gross bonus paid.

**Conclusion;** Always check the commission sheet in which the commissionable gross was incorrect, you may notice that the percentage of commissionable gross charge-back is NOT just a percentage of gross.

### 3). Finance Bonus

Within this column enter a Flat Dollar amount which you would like to pay a salesperson for additional income generated within the Finance & Insurance Department.

**Special Note:** This is not an income column, that would be located within the **Managerial Review** portion of this worksheet

### 4). Unit Sales Count

This column requires you to enter a Unit Sales Count value, usually 1.0. Be sure to enter the Unit Count value within the proper column, either NEW or USED. You may also split transactions between sales personnel by entering a .5 value on commission sheets.

**Special Note:** If making a Finance & Insurance entry only on a specific line, enter a unit count sales value under new or used equal to .0001. This minimal value will not effect total unit sales count, but will proper distribute the dollar value entry made for calculating New or Used payout percentages.

### 5). Actual Commissionable Gross Profit

The value entered into this cell is equal to the actual calculated vehicle sale in-house commissionable gross profit. Within this cell you would enter either a calculated **Negative or Positive** Commissionable Gross value. The reason this value may differ from what is on the salespersons commission sheet is that usually a dealership will not financially penalize a salesperson for selling a vehicle with a negative commissionable gross and simply enter a zero value on the commission sheet while paying a Flat Dollar Amount Commission.

Yet, when calculating the actual payout percentage of commissionable gross a negative commissionable gross value is required.

### 6). Actual Vehicle Gross Profit

This value entered should only equal the transactions Actual New or Used Vehicle Sale Gross Profit posted to the financial statement.

If utilizing accessory sale accounts, include accessories sales gross profit within this value, if paid-on and included in commissionable gross.

**Special Note:** If vehicle sales are 'Packed', meaning a portion of commissionable gross and actual gross are reduced by a fixed dollar amount, which in turn is credited to an account other than Sales or Cost-of-Sales (e.g. Delivery Expense Account) you may want to include that dollar value within the Total Actual Vehicle Gross Profit. Consistency is important for benchmarking.

### 7). Actual Finance & Insurance Gross Profit

Enter within these cells the Total Finance & Insurance Gross Profit generated on the New or Used Vehicle Sale which will be posted to the financial statement within the finance sales department. If utilizing F & I Aftermarket & Accessories sales accounts within the Finance department, include that gross profit value within this income total, if a commission is paid and included on a commission sheet.

**Special Note:** This value doesn't include any gross profit values which are posted directly to the New or Used Vehicle departments.

## Commission Pay Periods - Commissioning Monthly, Bi-monthly or Weekly

**Prepaid Wages or Draws** - What are they & how do they work?

Lets clarify how the Excel commission sheets work. First, they are designed to maintain & calculate **month-to-date sales & commissions** payable. In-turn meaning that at any point within a given month you could printout the commission sheets and pay commissions, thus generating multiple payroll payments throughout a month.

This program allows you the option of paying commissions weekly, bi-monthly, or monthly, and that is why Prepaid Wages, Draws and Commissions require your attention.

### Examples of Different Payroll & Commissioning Scenarios:

#### Dealership Pays Commissions Monthly

Lets say your organization pay's monthly and throughout the month at the End of Each Pay Week you issue each salesperson a paycheck consisting of both a Prepaid/Draw against commissions payable and a base weekly Salary/Other Wage.

Within each Prepaid cells under the active Payroll Period you would enter, either at the beginning of the month or **\*\* PRIOR \*\*** to paying commissions the amount of Prepaid or Draw that is to be applied against total commissions payable.

e.g.. Weekly paycheck \$ 500, \$ 300 base Salary & \$ 200 Draw.

The Prepaid/Draw cell for that given salesperson would have a value of \$ 200 for each pay period ending within that month, \$ 300 would be enter a different cell under the heading Salaries for that given salesperson.

This entry then reduces Total Commissions Payable by \$ 800, assuming a month with 4 pay weeks

#### Dealership Pays Commissions Bi-Monthly

What if your organization pay's commissions bi-monthly, but Does Not pay a Draw on commissions throughout the month and issues each salesperson a weekly salary.

Within each Prepaid/Draw cell under an active payroll period you would **NOT** enter a value **until you printed-out your commission sheet.**

**After determining** the commission dollar amount you intend on paying you would then enter the commission paid in the weeks prepaid/draw cell. Thus reducing the amount of future total commissions payable.

e.g.. Weekly Salary \$ 300 & Prepaid/Draw \$ 0.

The Prepaid & Draw wages cell for that given salesperson would be Pay Period 1 = \$ 0. Pay Period 2 would equal total commissions paid to date (Do not include the Salary/Other Wages in the prepaid amount).

The \$ 300 salary would be entered in the cell under the heading Salary for that given salesperson.

**Special Note;** when issuing payroll checks you must remember to either add the weekly salary to the commissions payable total or issue a separate salary payroll check since it is NOT included in the print-out on your commission sheet.

## Dealership Pays Commissions Weekly

Lets say your organization pay's Weekly and you **Do Pay a Draw** on commissions throughout the month and issue **NO Salary** to each salesperson on a weekly basis.

Within each cell under an active payroll period you would enter, either at the beginning of the month or **\*\* PRIOR \*\*** to paying commissions the amount of draw that is to be applied against total commissions payable.

## Draws and Overdraws - How to Control Them

### Protecting the dealership from overdraw positions - Withholding potential draw payments;

If you enter the weekly draw within each pay period cell, within the month, for each salesperson you hopefully be able to prevent an overdraw situation at month-end, which occurs due to a lack of additional sales. By doing this draws are deducted upfront for any possible remaining draw check which may be issued in that month from the total commissions payable due paid throughout the month, allowing you to finalize and reconcile commissions payable at month-end.

As for each pay week you would review the commission sheet of each salesperson and if total commissions payable equal a **Negative Amount** only Issue a Prepaid/Draw payroll check.

If Total Commissions Payable equals a **Positive Amount-Exceeding the Draw Amount**, than change the draw amount for that pay periods **only** to a zero dollar amount and print-out your commission sheet. The reason for removing this draw amount is that this draw was never actually paid and simply a potential draw that may have occurred, but didn't.

Total Commission Payable should than equal the positive amount plus the draw amount you zeroed out.

Total Commissions Payable is now the amount that your **Weekly Payroll Check would equal**.

Now that you have determined what your Payroll Check will be and have a print-out of your commission sheet, you would **ENTER** the total commission payable value that you intended on issuing a payroll check for under the payroll period. Thus **reducing** the amount of **future** total commissions payable.

### Applying weekly Draw values as the month progresses;

With this approach you start the month with a zero weekly draw value within each pay period cell, for each salesperson and as the month progresses you would review each salespersons commission sheet and apply the **varying draw value** to each pay period up to the maximum allowed draw per pay period. Varying draw value being the difference between commissions payable and maximum allowed weekly draw.

As for each pay week you would review the commission sheet of each salesperson and if total commissions payable equals a **Negative Amount** only Issue a **Draw Payroll Check**. **Remember** to enter the amount of the draw check into the Prepaid cell, for that pay period after determining no commissions are to be paid, this entry will apply the draw paid to future commissions payable.

If total commissions payable equals a **Positive Amount**, and GREATER THAN the weekly draw allowed, the total commissions payable is **now** the amount of your **Weekly Payroll Check**. Print-out your commission sheet for payroll & than enter within the cell, for that pay period the amount of commissions that will be paid, this entry will than reduce future commissions payable.

If total commissions payable equals a **Positive Amount**, and LESS THAN the weekly draw allowed, you will need to manually determine the difference between total commissions payable and the established draw amount. Your **payroll check now equals the maximum draw amount**, but total draw only equals the difference between total commissions payable and the Payroll check to be issued. This difference (Draw) is now the amount you enter into the cell for that pay period, after printing out your commission sheet. **Remember** to enter the draw amount into the cell, this entry will apply the draw paid to future commissions payable.

**Reminder;** when issuing the payroll check you **must remember** to either add the weekly salary to the commissions payable total or issue a separate salary payroll check since it is **NOT** included in the print-out of your commission sheet.

## Bottom-line concerning Prepaid and Draws

**Whenever a check is issued that Exact Check Amount, excluding salary, must be entered within the Prepaid/Draw pay period cell for that specific individual and salaries & other non-commission wages are above and beyond the calculated total commissions payable.**

## Commission Workbook Summary

It all sounds a little confusing at first, but the bottom-line is that if your currently processing commissions, you are currently are doing the above procedures and probably never really had to write it down. Secondly, the above explanations are generalized vehicle sales commissioning procedures and with some experimentation are highly likely to mimic your dealerships current vehicle sales commissioning structure and pay plans.

Probably the best way for you to approach this commissioning procedure transition is simply by taking a few previously used commission sheets and try to set-up the Default Main Menu worksheet and enter the commission sheets. Hands-on experimentation will be an excellent learning tool.

You may also find that your current system could have a few flaws that need to be addressed, create a new pay plan or simply come to the conclusion that this system of commissioning vehicle sales could actually save your dealership a substantial amount of money by properly managing and eliminating potential costly commissioning errors.

Pay Week - Ending Dates (mm/dd/yyyy)

Weekly Pay Period End Dates & Individual Pay Plans													
Access Buttons	Sales Representatives Name	Pay Week 1		Pay Week 2		Pay Week 3		Pay Week 4		Pay Week 5		Total Salary & Draws	
		No Pay Period Assigned		No Pay Period Assigned		No Pay Period Assigned		No Pay Period Assigned		No Pay Period Assigned		\$ Salary	\$ Prepaid
		\$ Salary	\$ Prepaid	\$ Salary	\$ Prepaid	\$ Salary	\$ Prepaid	\$ Salary	\$ Prepaid	\$ Salary	\$ Prepaid		
*****	Salespersons Name-1	\$ 300.00	\$ -	\$ 300.00	\$ -	\$ 300.00	\$ -	\$ 300.00	\$ -	\$ -	\$ -	\$ 1,200.00	\$ -
*****	Salespersons Name-2	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-3	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-4	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-5	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-6	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-7	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-8	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-9	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-10	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-11	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-12	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-13	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-14	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
*****	Salespersons Name-15	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

- Salary & Other Wages; values considered an expense directly related to selling vehicles which can't be directly associated with a specific transaction, such as a weekly salary or an hourly wage.  
 Salary values are included in the total commissioning expense when calculating the total percentage of gross profit paid, since this expense is a large factor in the cost of selling vehicles.

Vehicle Sales Commission Pay Plan Structures												
Sales Representatives Name	Base Level % of Commissionable Gross Profit						Plateau Bonus Calculation Factors					
	Base % level 1		Base % level 2, >=		Base % level 3, >=		Base \$ level 1, >=		Base \$ level 2, >=		Base \$ level 3, >=	
	\$ Level	Payout %	\$ Level	Payout %	\$ Level	Payout %	\$ Level	\$ Bonus	\$ Level	\$ Bonus	\$ Level	\$ Bonus
Salespersons Name-1	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-2	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-3	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-4	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-5	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-6	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-7	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-8	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-9	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-10	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-11	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-12	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-13	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-14	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Salespersons Name-15	\$ -	0.00%	\$ -	0.00%	\$ -	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

- Cells highlighted Red indicate a commissioning variance from the first vehicle sales commission pay plan established and should be reviewed for accuracy. Cells red in color may allow a correcting entry.  
 - Different percentage and dollar value settings may be used for each salesperson and once entered will not need modification until a new pay plan is designed and implemented.

This in turn allowing you even more flexibility in structuring commission play plans for each individual salesperson.

e.g. Salespersons % of commissionable gross changes based on prior months sales activity, while the others remain the same.

- Base Level % of Commissionable Gross Profit and Plateau - Flat \$ Bonuses based on Commissionable Gross are Non-Retro calculations.

# Commission Worksheet Setup & General Instructions

## Step 1:

At the very top of this worksheet enter the, Start Date & End Date for the month that will be commissioned.

## Step 2:

Enter the 4 or 5 [Payroll Week - Ending Dates](#) within the month that you are commissioning, even if you **do not** pay commissions on a weekly basis.

Different payroll - commissioning cycles will be explained in more detail below.

### [Pay Period - Week 5:](#)

As for Pay Period 5 which commonly is a non-active period, leave blank unless the month requires it. All salary & pre-paid values should equal zero if not used.

You **do not** needed to zero - remove the Vehicle Sales Commission Pay Plans %'s or Dollar Values on Week 5, since there will be no commission entries.

## Step 3:

Enter each and every Sales Representatives Name that you will be commissioning by type over the default worksheet entries Salespersons Name-1 thru 15.

If you currently do not have 15 salespeople, clear the remaining cells removing the default value and leave blank - empty.

**Helpful Hint:** At first it may seem logical to enter sales personnel names alphabetically but that will complicate matters later on since our goal here is to create a Master Workbook. Enter Sales Representative Names by seniority - longevity, making it much easier to add & delete salespeople at a later date.

## Step 4:

Now, for each and every Sales Representatives you have enter input their weekly Salary for each payroll period. If a salesperson doesn't receive a weekly salary leave blank. **Note;** if there are only 4 pay periods within the month you will not be entering a Salary value within the Pay Period - Week 5 cells.

## Step 5: Vehicle Sales Commission Pay Plans

Enter your commission pay plan for each and every Sales Representatives, see examples and notes below.

You may use **any combination of commission calculators** you desire with different payout levels for each salesperson. If you do not use either a Base Level % of Commissionable Gross Profit or a Plateau Bonus Calculation, leave cells set at a zero value.

### [Understanding the entry of Dollars Values & Percentages](#)

\* When establishing different plateau levels your entries are to **Start at Level 3** and work backwards towards Level 1, level 3 being your highest payout level.

\* If you only have **2 payout levels**, than Level 1 should equal zero, indicating that nothing is to be paid until the salesperson obtains at minimum a Level 2 sales goal.

\* If only **1 payout level** than Level 1 & Level 2 should equal zero, indicating that nothing is to be paid until the salesperson reaches at minimum a Level 3 sales goal.

If **not done correctly** and only Level 1 & Level 2 have entries, the commission calculator will base its calculation on the fact that if anything is sold - pay nothing.

### Example: Base Level % of Commissionable Gross Profit

Most common commission plan used by auto dealers, a % of Total Commissionable Gross. Within these cells you would enter what % of commissionable gross is paid.

**Straight 25 % of Commissionable Gross**, enter:

Commissionable Gross	\$ Level	Payout % Value
Base Gross Level 1 >	\$ -	0.00%
Base Gross Level 2 >	\$ -	0.00%
Base Gross Level 3 >	\$ -	25.00%

Pay a flat 25% commissions on all commissionable gross

**20% Base, 25% at \$ 15k, 30% at \$30K & above:**

Commissionable Gross	\$ Level	Payout % Value
Base Gross Level 1 >	\$ -	20.00%
Base Gross Level 2 >	\$ 14,999.99	25.00%
Base Gross Level 3 >	\$ 29,999.99	30.00%

At \$ 30,000, **all** commissions calculated at 30%

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### Example: Plateau Bonus Calculation Factors

Added incentive to of the above commissioning pay plan. A straight forward calculation which will consider only the commissionable gross dollar value and add a [Flat Dollar Amount](#) bonus to commissions payable when that level of commissionable gross is obtained.

Gross Plateau Bonus	\$ Level	Flat \$ Bonus
Base Gross Level 1 >=	\$ 5,000.00	\$ 100.00
Base Gross Level 2 >=	\$ 15,000.00	\$ 250.00
Base Gross Level 3 >=	\$ 30,000.00	\$ 500.00

This commission plan will pay a salesperson a \$250 bonus if they generate \$ 15,000 in commissionable gross, but less than \$ 30,000.

It is non-retro, so flats need to be adjusted accordingly at each level.

**Helpful Hint:** Very often an additional incentive is added to a salespersons pay plan, that being; a straight forward calculation which considers the number of units sold and paying a [Flat Commission Amount](#). This can be done by adding this entry as an individual sale on the actual commission sheet with a Customer Name of (e.g. Unit Sale Count Bonus) and inputting a dollar value within the Flat Commission column. (New or Unit) Allocate the total bonus by entering within the New & Used Flat Commission columns a distributing % - Dollar amount . Unit Count equals zero

### Step 6: Back-up your work to a Master Workbook

At this point in time you have pretty much completed the tedious work of establishing a functional sales commissioning workbook that can be used on a monthly basis. It is suggested that you now SAVE this workbook as a master workbook named ; e.g. MasterCommissionSheet, so that it will be available if needed.

After you have saved it as a Master Workbook, you will than want to RESAVE it a second time with a NEW file name which identifies the commissioning month. e.g. CommissionSheet\_062009 (06 being June & 2009 being the year). This will now be the workbook you use moving forward except that your be changing the file name for each new month as time passes.

## Purpose of Forms Buttons on Main Menu Worksheet

There are 4 important forms buttons on the Main Menu Worksheet, here's a brief explanation;

### Display & Print Managerial Reviews

Each and every commission sheet can analysis a salespersons actual income generated for the dealership, other than commissionable gross. These commission sheets will also calculate the actual dealerships payout percentages of actual gross profit. If you desire, you may incorporate these calculates when completing individual sales commission sheets. It is not mandatory that you do this, but it will provide you and the dealership with extremely valuable numbers when analyzing a sales persons performance and value.

This forms button turns-on or turns-off the analysis capabilities by display additional input fields next to the actual commission sheets of each salesperson. It is suggested that you turn-on this capability until you decide if you will utilize this feature. You can turn this feature On or Off at anytime, depending on when you plan on inputting the required data.

### Activate Pay Period Reset Buttons

This forms button is available solely to turn-on or turn-off other forms buttons that erase data within this workbook. This data is what you would normally erase when you'll creating a new workbook for a new commissioning month. That being;

- Clearing all data entered on each and every individual commission sheet.
- All Dates defining Pay Periods & Commissioning Month
- All Prepaid commissions - Draws and Salaries for Pay Week 5

**Special Note:** Salaries for all salespeople for weeks 1 - 4 are not reset to a zero value. you will need to manual adjust them if necessary.

Vehicle Sales Commission Pay Plans, percentages & dollar values will also not reset to zero. If necessary you'll need to manually adjust them as well.

It is suggested that you turn-off this capability once you have completed the set-up of a new month. You can turn this feature On or Off at anytime, depending on you needs.

### Reset Sales Commission Worksheets

Somewhat self-explanatory, by clicking on this forms button all data inputted on each & every salespersons commission sheet is erased. With the Activate Pay Period Reset Button **Off**, this feature will not work.

### Reset Commission Pay Periods

By clicking on this forms button all data related to Pay Periods & Draws - Prepaid commissions is erased, including all pay week 5 data. With the Activate Pay Period Reset Button **Off**, this feature will not work.

### Commission Pay Plans Protection

This forms button will simply Lock & Unlock the Vehicle Sales Commission Pay Plan entries preventing accidental modification. You can turn this feature On or Off at anytime. With the Activate Pay Period Reset Button Off, this feature will not work.

## How to Start a New Month

After initially setting-up your first workbook things become much easy. So here's the suggestion.

**Step 1:** Open your last active months workbook. Save it under a New workbook name. e.g.. from CommissionSheet\_062009 to CommissionSheet\_072009

**Step 2:** Turn-on the 'Activate Pay Period Reset Button'. Click both forms buttons; [Reset Sales Commission Worksheets](#) & [Reset Commission Pay Periods](#)

**Step 3:** Enter Commissioning Month Dates & Pay Period Week Ending Dates. When there are 5 pay weeks within a month, you must Re-enter week 5 Salaries.

**Step 4:** Add or Delete Sales personnel, remembering salaries & commissioning pay plan % or dollar values.

**Step 5:** Review your Main Menu worksheet for accuracy and Save under new file name, e.g. CommissionSheet\_072009.

**Step 6:** Done, workbook now ready to be used for the new month.

# Enter Salespersons Name

# Vehicle Sales Compensation Report

Start Date: 06/01/09

End Date: 06/30/09

Invoice Number	Customer Name	Stock #	Flat Commission		Commissionable Gross		Finance Bonus		Unit Count	
			New Vehicles	Used Vehicles	New Vehicles	Used Vehicles	Reserve	After Market Warranty	New Units	Used Units
1			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
2			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
3			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
4			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
5			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
6			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
7			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
8			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
9			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
10			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
11			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
12			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
13			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
14			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
15			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
16			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
17			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
18			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
19			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
20			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
<b>Commission Subtotals</b>			0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0
			<b>Total Flat Commission</b>		<b>Total Commissionable Gross</b>		<b>Total Finance Bonus</b>		<b>Total Unit Count</b>	
			0.00		0.00		0.00		0.00	

### Draws or Prepaid Applied

Week Ending: 06/01	\$ 200.00
Week Ending: 06/08	\$ 200.00
Week Ending: 06/15	\$ 200.00
Week Ending: 06/22	\$ 200.00
Week Ending: 06/29	\$ 200.00
<b>Total Prepaid</b>	<b>\$ 1,000.00</b>

Gross Commission	\$ -
Plateau Bonus	\$ -
Flat Commissions	\$ -
Finance Bonuses	\$ -
<b>Commissions Earned</b>	<b>\$ -</b>
LESS: Prepaid	\$ (1,000.00)
<b>Commissions Payable</b>	<b>\$ (1,000.00)</b>

### Salaries Paid

Salaries Paid	\$ 1,250.00
Commissions	\$ -
<b>Total Payroll</b>	<b>\$ 1,250.00</b>

### Commission - Sales Pay Plan Structure Re-Cap

% of Gross Profit	\$ Level	% Value
Base % level 1	\$ -	20.00%
Base % level 2, >=	\$ 5,000.00	25.00%
Base % level 3, >=	\$ 20,000.00	30.00%

Non-Retro % Calculation of Commissionable Gross

Plateau Bonus Factor	\$ Level	\$ Bonus
Base \$ level 1, >=	\$ 10,000.00	\$ 500.00
Base \$ level 2, >=	\$ 15,000.00	\$ 1,250.00
Base \$ level 3, >=	\$ 20,000.00	\$ 2,250.00

Non-Retro Flat \$ Bonus based on Commissionable Gross

Actual Vehicle Sales Gross Profit - Managerial Review						
Actual Comissionable Gross		Actual Vehicle Gross Profit		Actual Finance & Insurance		Gross Profit
New Vehicles	Used Vehicles	New Vehicles	Used Vehicles	Reserve	After Market Warranty	Total Gross Profit
1	0.00	0.00	0.00	0.00	0.00	0.00
2	0.00	0.00	0.00	0.00	0.00	0.00
3	0.00	0.00	0.00	0.00	0.00	0.00
4	0.00	0.00	0.00	0.00	0.00	0.00
5	0.00	0.00	0.00	0.00	0.00	0.00
6	0.00	0.00	0.00	0.00	0.00	0.00
7	0.00	0.00	0.00	0.00	0.00	0.00
8	0.00	0.00	0.00	0.00	0.00	0.00
9	0.00	0.00	0.00	0.00	0.00	0.00
10	0.00	0.00	0.00	0.00	0.00	0.00
11	0.00	0.00	0.00	0.00	0.00	0.00
12	0.00	0.00	0.00	0.00	0.00	0.00
13	0.00	0.00	0.00	0.00	0.00	0.00
14	0.00	0.00	0.00	0.00	0.00	0.00
15	0.00	0.00	0.00	0.00	0.00	0.00
16	0.00	0.00	0.00	0.00	0.00	0.00
17	0.00	0.00	0.00	0.00	0.00	0.00
18	0.00	0.00	0.00	0.00	0.00	0.00
19	0.00	0.00	0.00	0.00	0.00	0.00
20	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	
Actual Comissionable Gross		Actual Vehicle Gross Profit		Actual Finance & Insurance		
	0.00		0.00		0.00	0.00

**Actual Gross Profit % Payout**

	Actual Gross %	Gross/Plateau	Salary	Flat Comm.	Payout %
New Vehicles Sales	0.00%	\$ -	\$ -	\$ -	0.00%
Used Vehicles Sales	0.00%	\$ -	\$ -	\$ -	0.00%
<b>Total Actual Vehicle Gross Profit</b>	<b>0.00%</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0.00%</b>

	Actual \$ Gross	% Fin. Gross	Reserve	Aftermarket	Payout %
Finance Income New	\$ -	0.00%	\$ -	\$ -	0.00%
Finance Income Used	\$ -	0.00%	\$ -	\$ -	0.00%
<b>Total Finance &amp; Aftermarket</b>	<b>\$ -</b>	<b>0.00%</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0.00%</b>

	Total \$ Gross	Gross/Plateau	Salary	Flats & Finance	Payout %
<b>Total Actual Gross Income</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0.00%</b>