



Account Manager Commission Split

The following outlines how to configure the Account Manager Commission module. Configuration will require Manager/Owner level permissions.

Under Utilities > Counselor Privileges

1. Select / Highlight the Counselor you wish to appoint an Account Manager to:

The screenshot shows the 'Counselor Privileges' screen with tabs for Privileges, Role / Comm., Commissions, Contact Info., Invoice, and Integra. A checkbox labeled 'Active Counselors Only' is checked. Below it is a table with columns: Logon ID, Counselor, Owner, and Active. One row is highlighted in blue.

Logon ID	Counselor	Owner	Active
UOXX064-VCOM	Debbie Tatum		Y

Buttons at the bottom: Add, Edit, Reset Pass, Consolidate.

2. Select > Account Manager at the bottom of the screen
 - a. Choose Account Manager

The screenshot shows the 'Account Manager' configuration screen. It includes fields for 'Activation' (Active checkbox, Beginning Date: 14 Nov 2017, Termination Date), 'User Properties' (various checkboxes for restrictions and permissions), and a dropdown menu for 'Account Manager' currently showing 'Kevin Kimes'. A red box highlights the dropdown, and a red arrow points to it from the right. Below the dropdown is a 'Commission Split' checkbox and a 'Shore exc. Group ID' field. 'Save' and 'Cancel' buttons are at the bottom.

3. Check the box: Commission Split
 - a. Once checked a "edit" box will appear
 - b. Select the "edit" box

This close-up screenshot shows the 'Account Manager' dropdown set to 'Kevin Kimes'. The 'Commission Split' checkbox is checked, and an 'Edit' button has appeared next to it. Red arrows point to both the checkbox and the 'Edit' button.



4. Clicking the edit box will bring up a table that will allow you to set the commission split for the Account Manager selected.
 - a. You can select a commission split of price percentage or profit percentage
 - i. The percentage of commission the Account Manager would receive
 - ii. Or The flat dollar amount (if applicable) the Account Manager would receive

5. Once you have selected the amount you must click '**SAVE**'
 - a. **NOTE: This will affect only NEW bookings made after changes have been saved.** Each time this is updated and/or changed – the new amount entered will affect only NEW bookings entered into the system moving forward. You cannot back date any amounts.

Within a reservation once the Account Manager Commission split has been activated:

1. The reservation will now show both the counselor and the Account Manager's commission as separate line items. Res Info > Counselor Commissions
 - a. The counselor will only be able to see their commissions
 - b. The account manager will see theirs and the counselor's commissions

Item	Counselor	Agency \$	Profit \$	%	Comm \$	Paid	Balance	Modify >
Cruise - Royal Caribbean International	Debbie Tatum	\$1,000.00	\$328.00	25.00%	\$82.00	\$0.00	\$82.00	Modify >
Cruise - Royal Caribbean International	Kevin Kimes	\$1,000.00	\$328.00	55.00%	\$180.40	\$0.00	\$180.40	Modify >
Total					\$262.40	\$0.00	\$262.40	

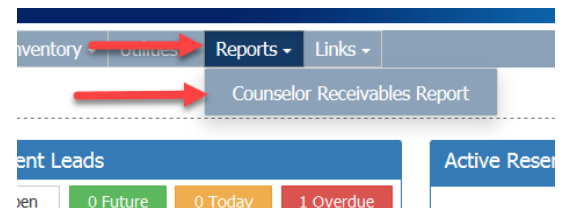


- c. **Note:** The commission and revenue recognition will follow the rules set forth under: Utilities > Counselor Privileges > Commissions: Allow Payment to be released when

Allow payment to be released when:	
Cl. Bal. \$0 and Vend. Bal. Open	☐
Cl. Bal. \$0 and Vend. Bal. Open	☐
Cl. Bal. \$0, Vend. Bal. Open, Dep. Past	☐
Cl. Bal. and Vend. Bal. \$0	☐
Cl. Bal. and Vend. Bal. \$0, Dep. Past	☒
Cl. Payment Received	☐
Cl. and Vend. Payment Received	☐
Cl. Payment Received, Vend. Bal. \$0	☐
Cl. Payment Received, Dep. Past	☐
Cl. Bal. \$0 and Vend. Bal. Open	☐
Cl. Bal. \$0 and Vend. Bal. Open	☐
Cl. Bal. \$0 and Vend. Bal. Open	☐

Reporting:

1. Reporting for Account Manager will function the same as a counselor
 - a. They will see their commissions on their own Counselor Receivables report
 - b. Reports > Counselor Receivables Report



Counselor Receivables Report Reservation # 2412717

Res. #	Lead Guest	Departure Date	Item Description	Conf #	Curr.	Total Profit	Comm %	Net Revenue	Amount Paid	Balance	Date Paid
2412717	Donna Test	6/9/2019	Royal Caribbean International - Cruise	77767	USD	\$328.00	55.00%	\$180.40	\$0.00	\$180.40	
Total USD						\$328.00		\$180.40	\$0.00	\$180.40	