

Commission – Phase 1

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Ticket	#I1928 REQ-I1928 LA-I4138 Commission for Signature Blinds & Grants V4
Date	18-02-2026
Version	1.0.0
Status	Completed

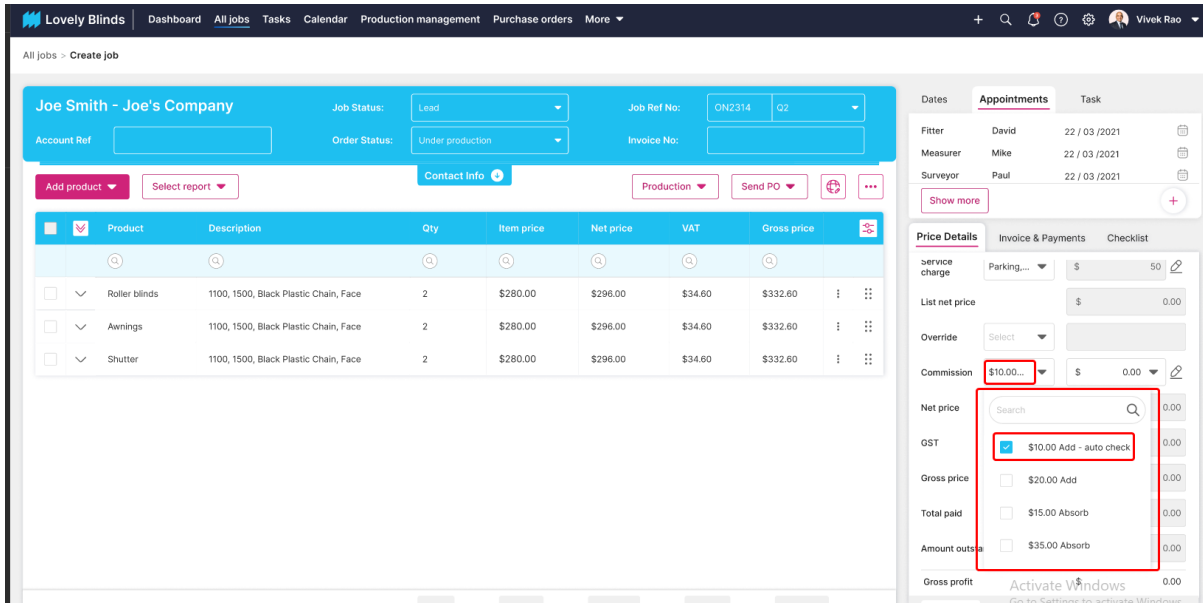
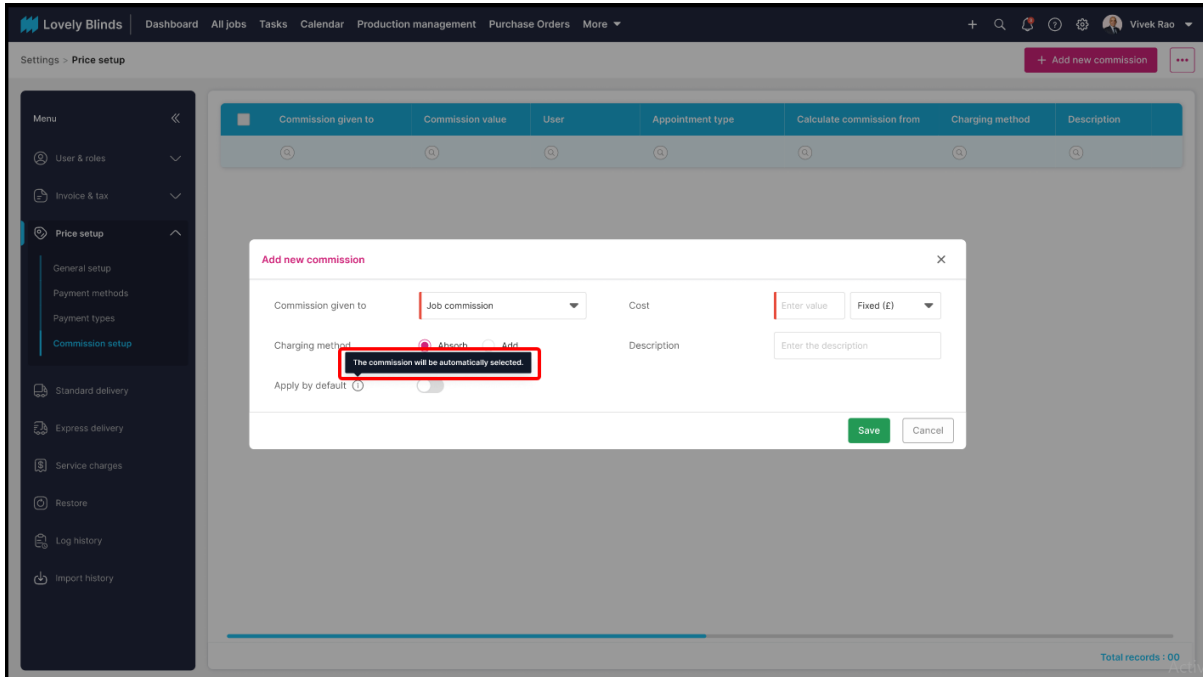
Prototype: [Figma Link](#)

Summary

This phase introduces enhanced commission functionality, adding configuration options for assigning commissions to users based on roles (Job Created By, Account Manager, Rep). Existing Job Commission logic is unchanged except for the new “Apply by default” option, which automatically applies the configured commission to a job.

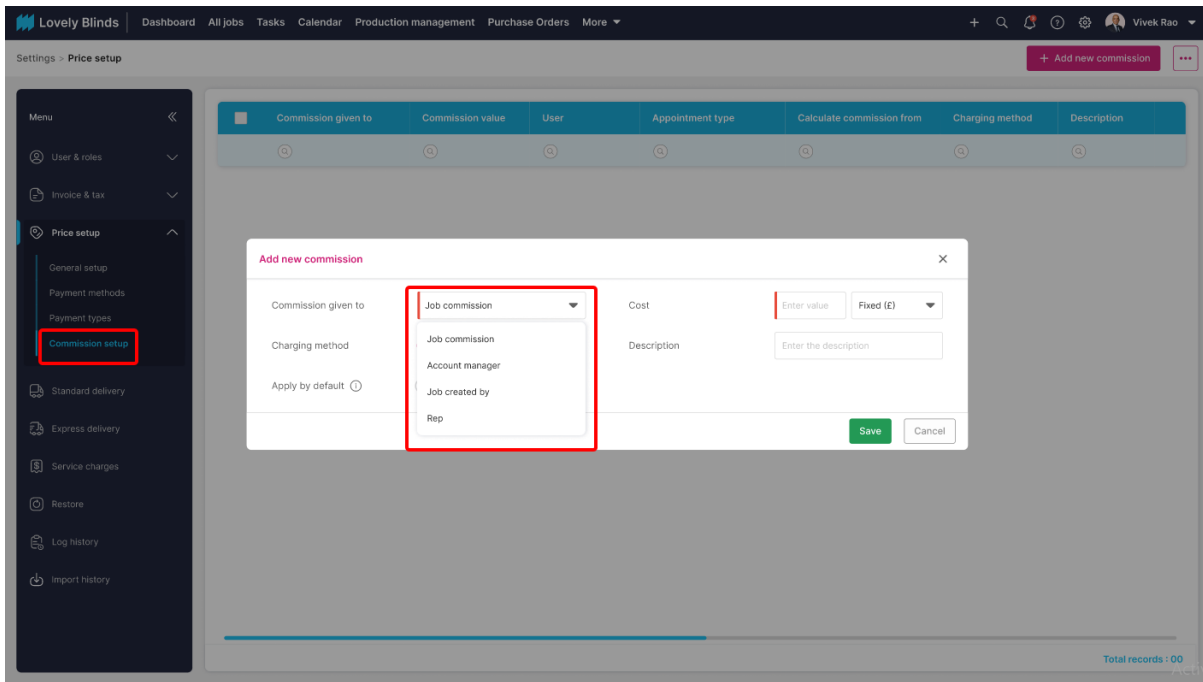
Job commission

Existing Job Commission logic remains unchanged, except for the new **“Apply by default”** option, which automatically applies the configured commission to a job when enabled.



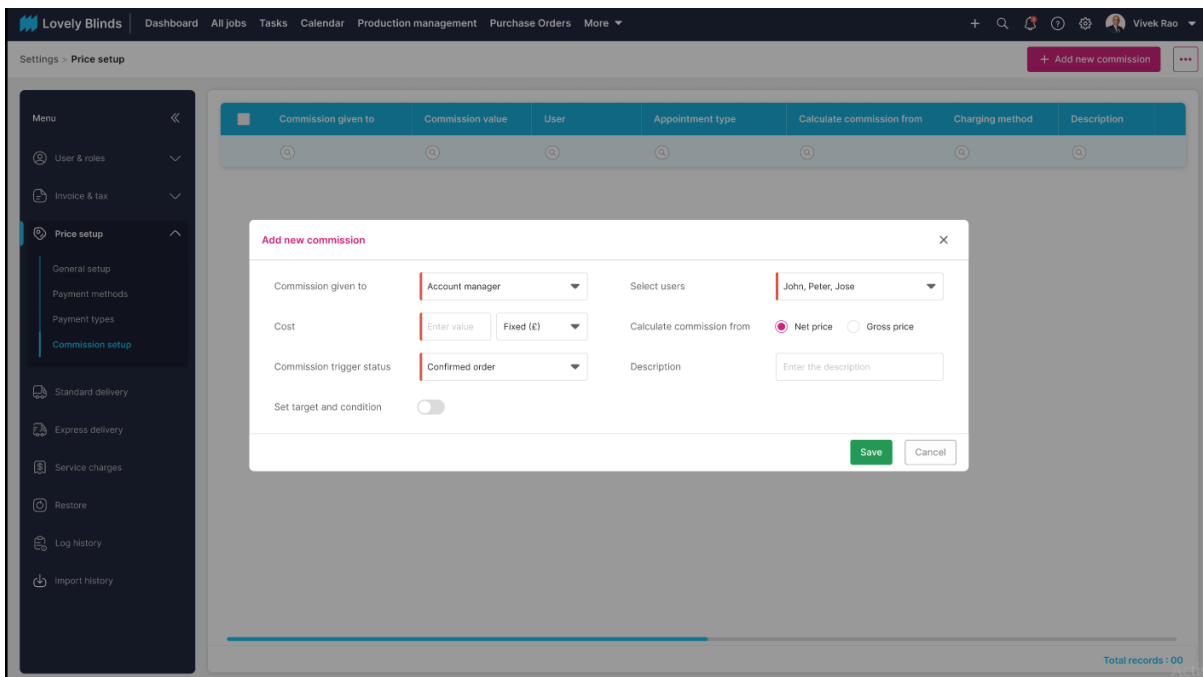
Commission setup page

The layout and commission types remain consistent with the live system.

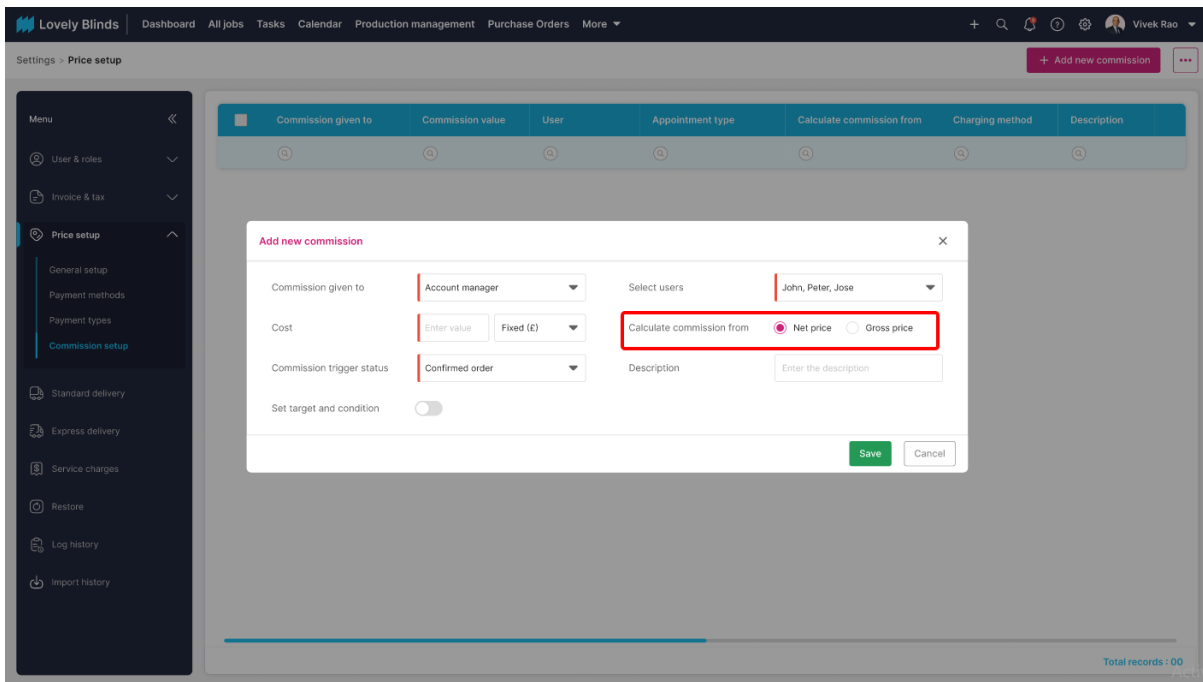
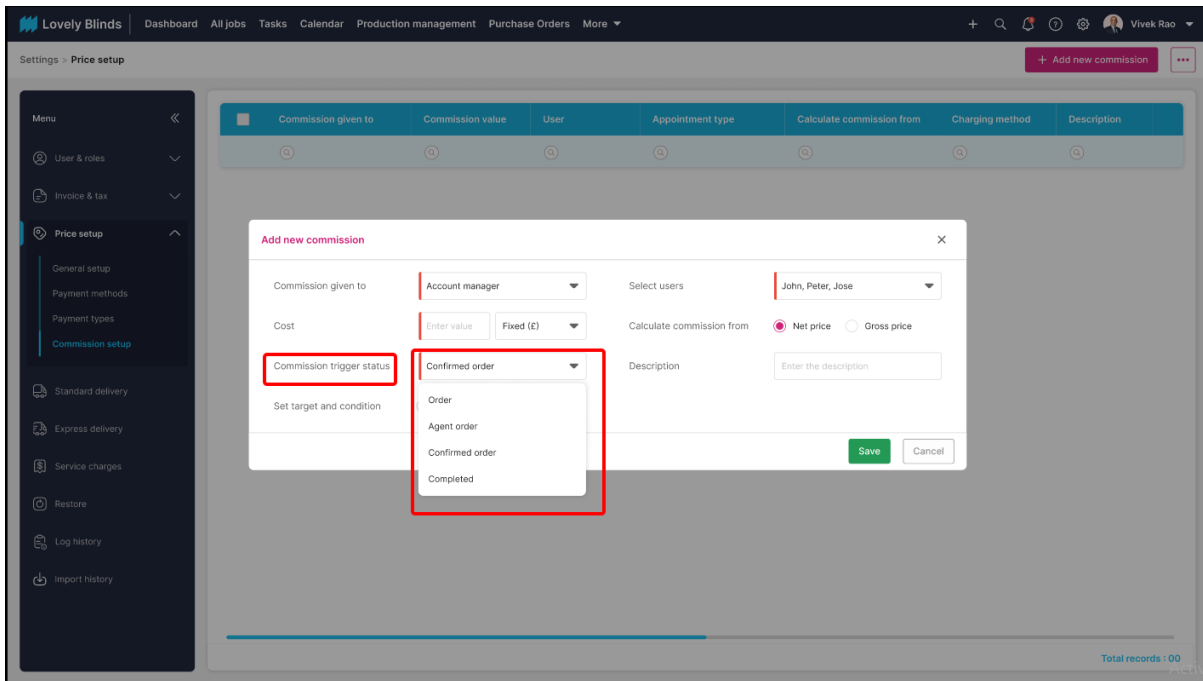


Account Manager

When the Account Manager type is selected:

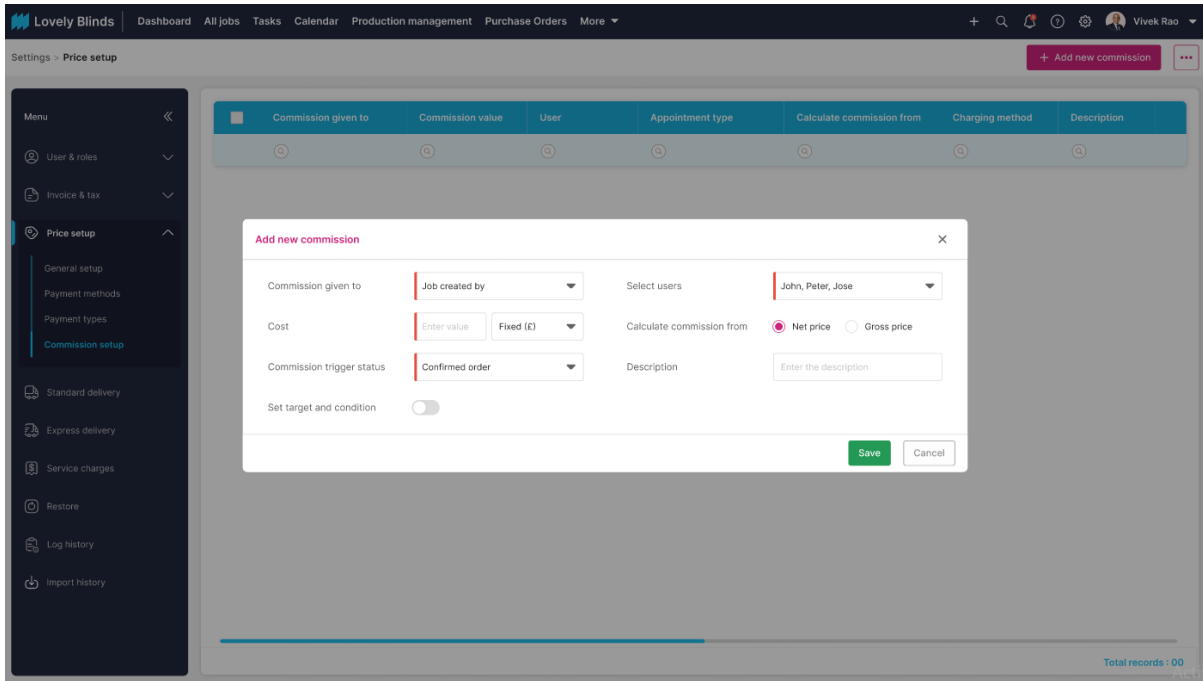


- A new **Commission Trigger Status** field allows commissions to be triggered when a job reaches a specific ordering-related status.
- This applies to all commission types except Job Commission.
- A **Users** field enables multi-user selection.
- The **Calculate Commission From** field allows choosing between **Net Price** or **Gross Price** for commission calculations.



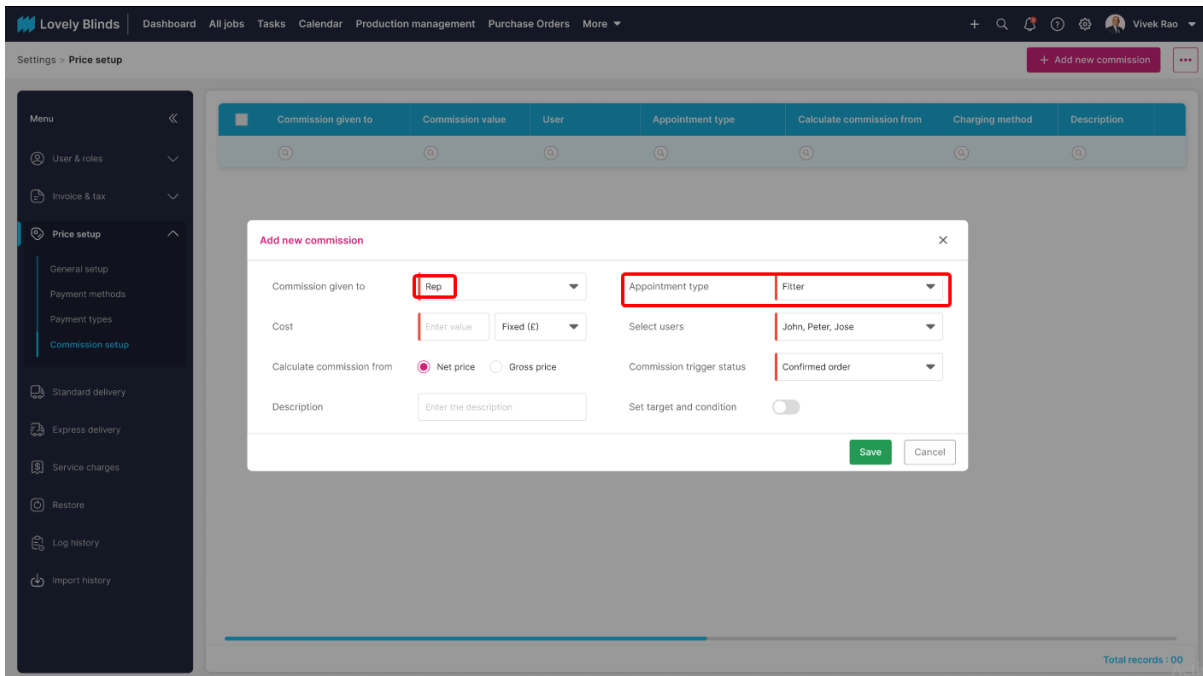
Job created by

This follows the same flow as the Account Manager type.
(Field in the Job layout).



Rep

Rep is nothing but the commission based on the appointment type, when select that we will show one extra field called “appointment type”, And the users selection field data will be filtered based on the selected appointment type.

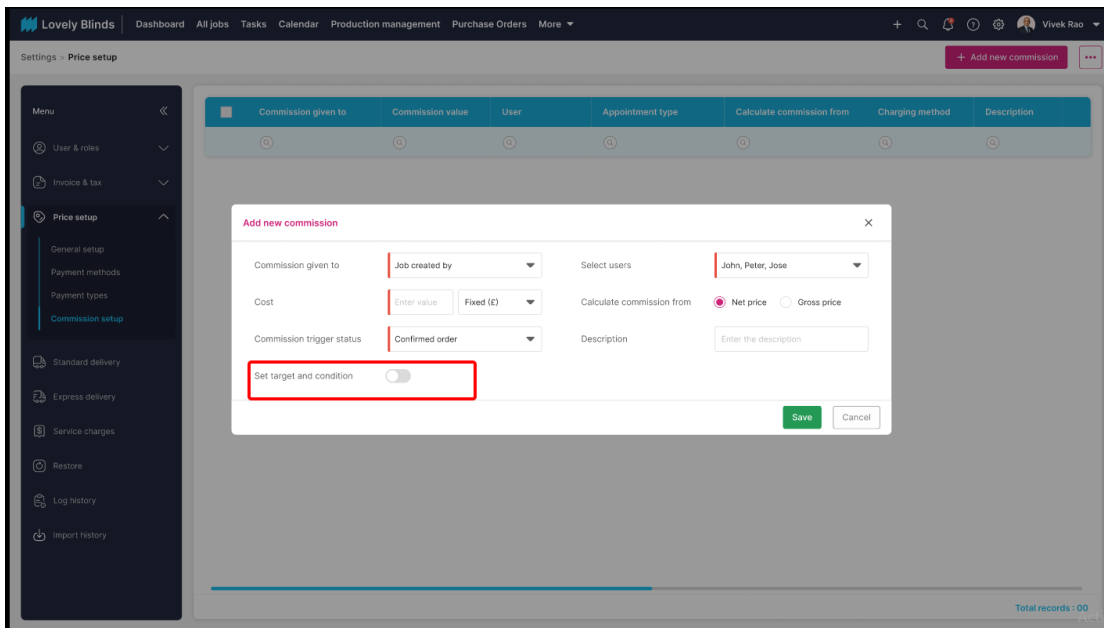


Set target and condition

These configurations apply to:

1. Account Manager
2. Job Created By

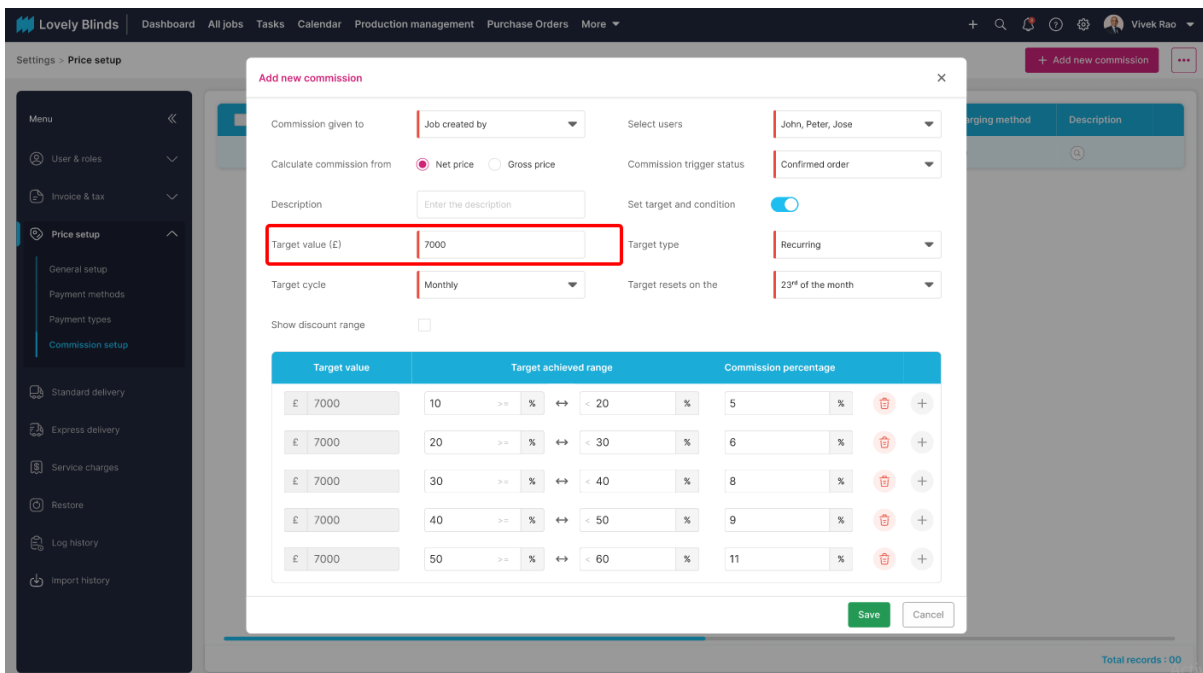
3. Rep



Enabling **Set Target Condition** allows defining conditions for the commission cycle.

The **Cost** field is renamed to **Target Value** and presented in a disabled state.

If users exceed the defined target value, the maximum commission percentage for that range is applied.



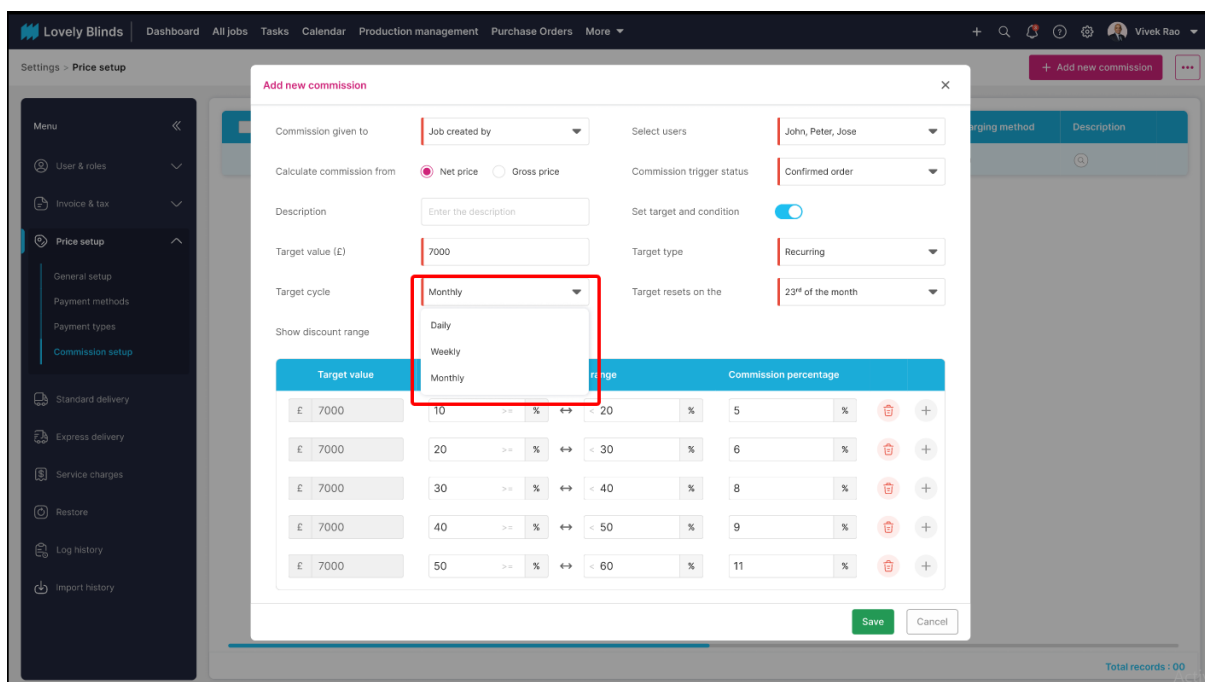
Target type

1. Two types are available:

1. Recurring

Commission runs continuously based on a selected cycle:

- Daily
- Weekly
- Monthly



Additional notes:

- Daily cycles do not show “Target resets on”.
- Weekly cycles list all weekdays (Mon–Sun).
- Monthly cycles list days 1–31, with a fallback to the last available day if a month has fewer days.

Lovely Blinds | Dashboard | All jobs | Tasks | Calendar | Production management | Purchase Orders | More

Settings > Price setup

Add new commission

Commission given to: Job created by | Select users: John, Peter, Jose

Calculate commission from: Net price Gross price | Commission trigger status: Confirmed order

Description: Enter the description | Set target and condition:

Target value (£): 7000 | Target type: Recurring

Target cycle: **Daily** | Show discount range:

Target value	Target achieved range	Commission percentage
£ 7000	10 >= % ↔ < 20 %	5 %
£ 7000	20 >= % ↔ < 30 %	6 %
£ 7000	30 >= % ↔ < 40 %	8 %
£ 7000	40 >= % ↔ < 50 %	9 %
£ 7000	50 >= % ↔ < 60 %	11 %

Save Cancel

Total records : 00

Lovely Blinds | Dashboard | All jobs | Tasks | Calendar | Production management | Purchase Orders | More

Settings > Price setup

Add new commission

Commission given to: Job created by | Select users: John, Peter, Jose

Calculate commission from: Net price Gross price | Commission trigger status: Confirmed order

Description: Enter the description | Set target and condition:

Target value (£): 7000 | Target type: Recurring

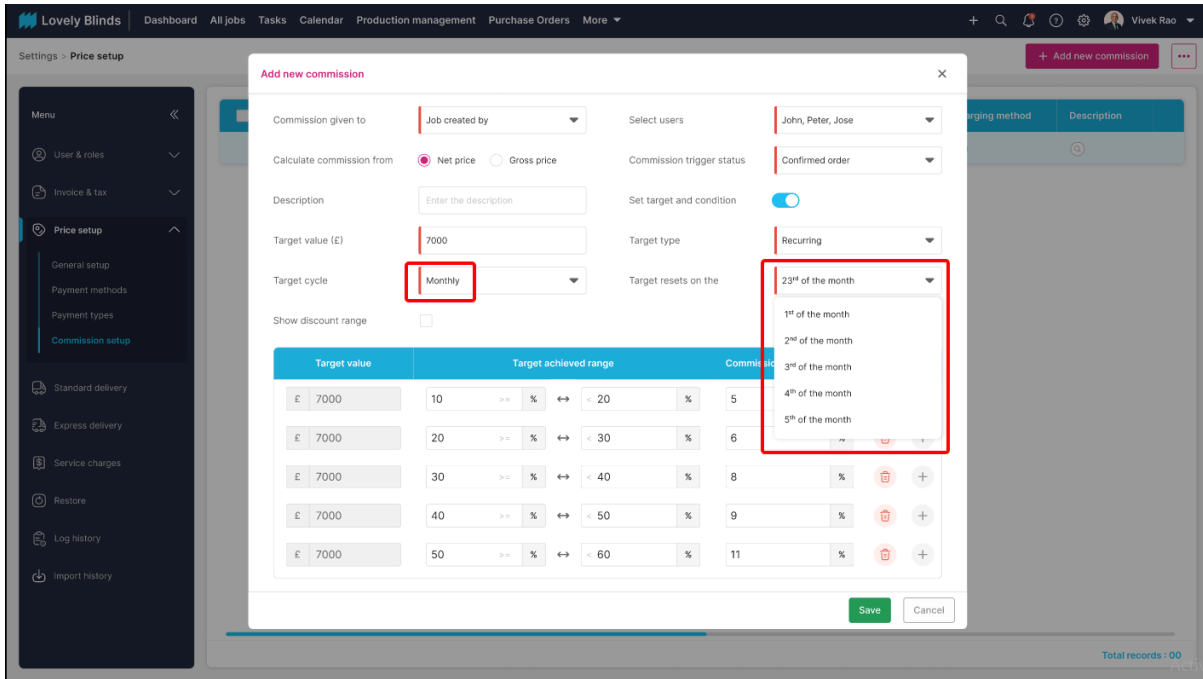
Target cycle: **Weekly** | Target resets every: **Monday**

Target value	Target achieved range	Commission percentage
£ 7000	10 >= % ↔ < 20 %	5 %
£ 7000	20 >= % ↔ < 30 %	6 %
£ 7000	30 >= % ↔ < 40 %	8 %
£ 7000	40 >= % ↔ < 50 %	9 %
£ 7000	50 >= % ↔ < 60 %	11 %

Show discount range:

Save Cancel

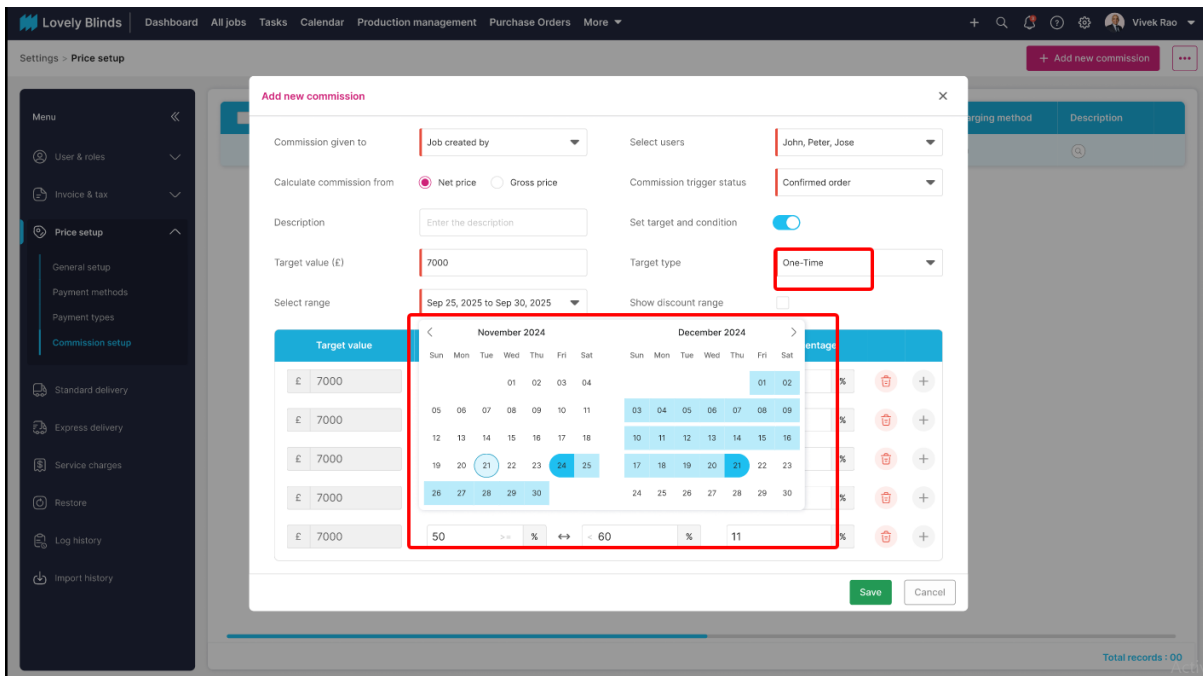
Total records : 00



2. One-Time

Commission applies only within a defined date range.

“Target cycle” and “Target resets on” are hidden and replaced with a date range selector.



Target Configuration Table

The table includes:

- **Target Value** (auto-filled and non-editable)
- **Target Achieved Range**
- **Commission Percentage**
- **Discount Range** (visible if enabled)

Key Logic

- Target range uses \geq for the start and $<$ for the end to avoid logical errors.

The screenshot shows the 'Add new commission' dialog in the 'Lovely Blinds' system. The dialog is titled 'Add new commission' and has a close button (X) in the top right corner. It contains several configuration options:

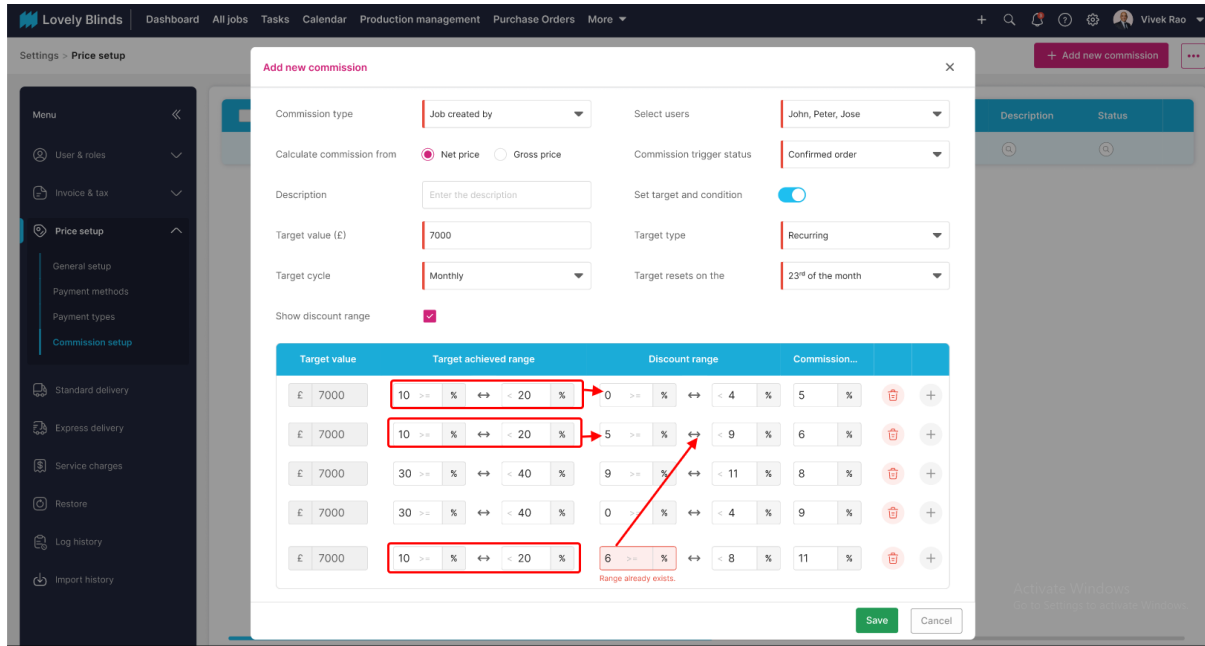
- Commission type:** Job created by (dropdown)
- Select users:** John, Peter, Jose (dropdown)
- Calculate commission from:** Net price (selected), Gross price (radio button)
- Commission trigger status:** Confirmed order (dropdown)
- Description:** Enter the description (text input)
- Set target and condition:** (toggle)
- Target value (£):** 7000 (text input)
- Target type:** Recurring (dropdown)
- Target cycle:** Monthly (dropdown)
- Target resets on the:** 23rd of the month (dropdown)
- Show discount range:** (checkbox)

Below these options is a table with three main columns: 'Target value', 'Target achieved range', and 'Commission percentage'. A red box highlights these three columns. The table contains five rows of data:

Target value	Target achieved range	Commission percentage
£ 7000	10 >= % ↔ < 20 %	5 %
£ 7000	20 >= % ↔ < 30 %	6 %
£ 7000	30 >= % ↔ < 40 %	8 %
£ 7000	40 >= % ↔ < 50 %	9 %
£ 7000	50 >= % ↔ < 60 %	11 %

At the bottom of the dialog are 'Save' and 'Cancel' buttons. The background shows the 'Settings > Price setup' menu and a table with 'Description' and 'Status' columns.

- Duplicate ranges are not allowed unless discount ranges differ.

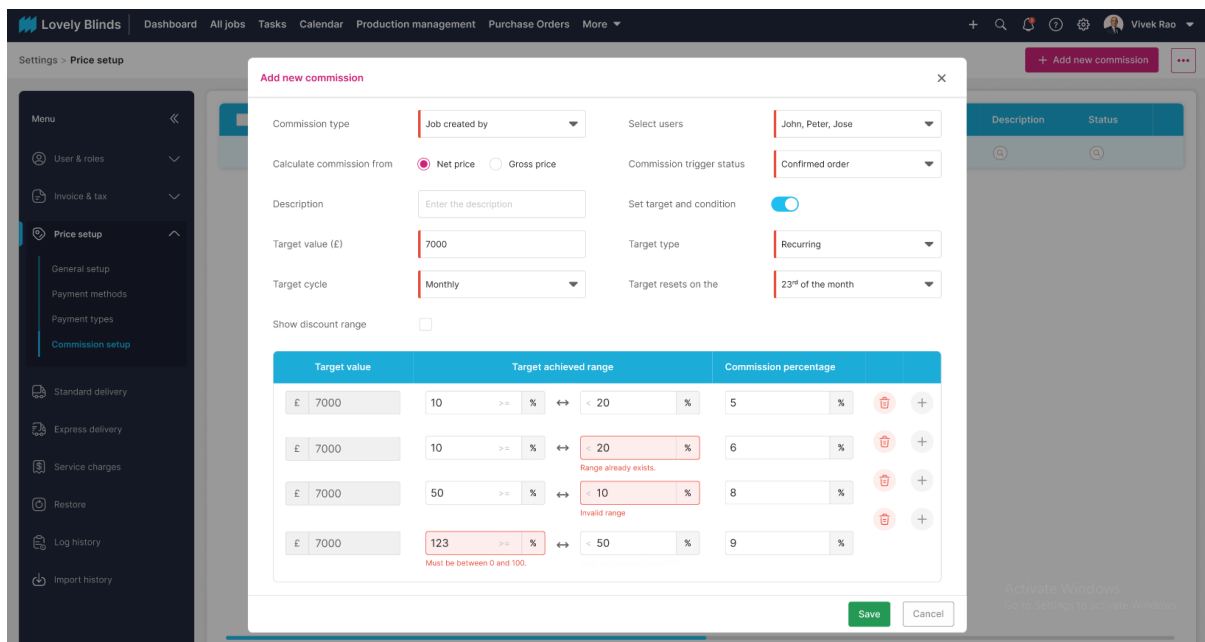


- Discount values applied at the job level are reversed into percentages for commission processing.
- Exact duplicates of row data (including discount range) are not permitted.

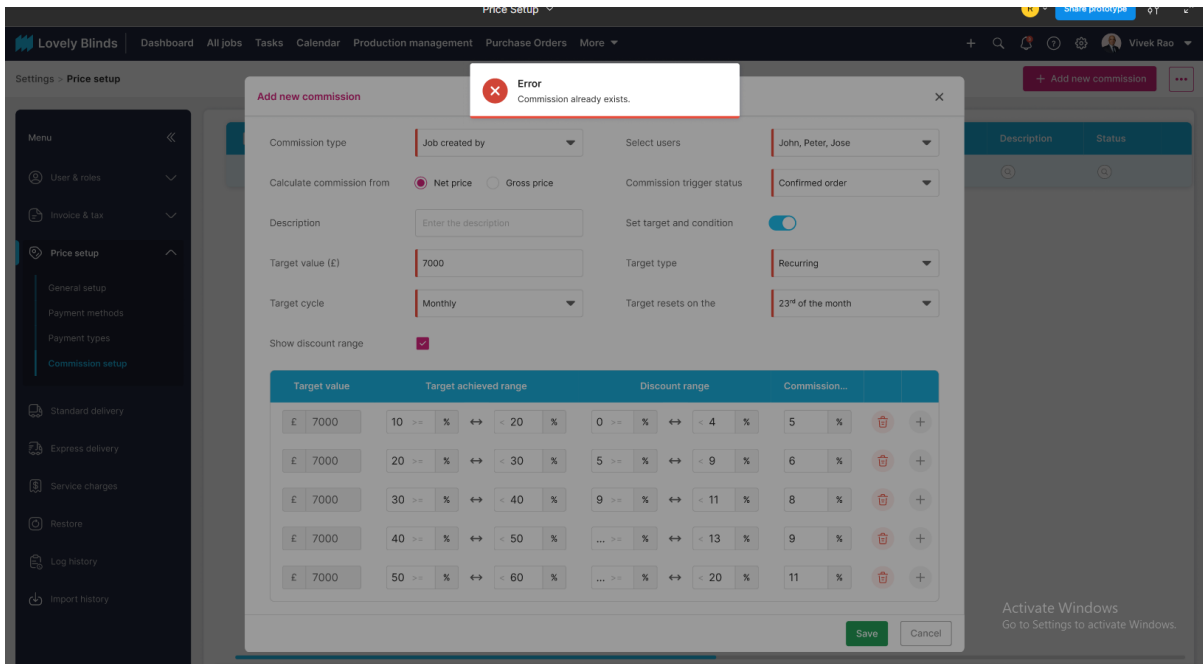
Error States

The system highlights:

Logical inconsistencies in field values



Exact duplication of commission configurations

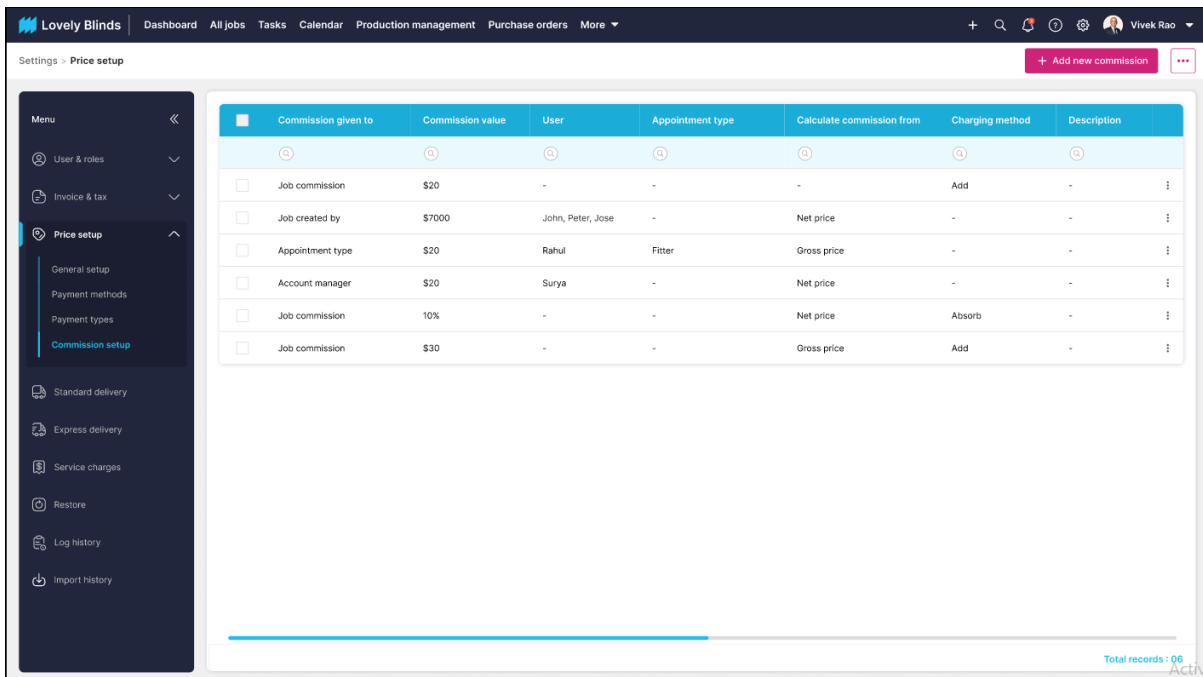


Note: All commissions will be taken through the report on this first phase.

Commission list screen

The list displays all created commissions.

Using the “More” menu:



Settings > Price setup

Commission given to	Commission value	User	Appointment type	Calculate commission from	Charging method	Description
<input type="checkbox"/> Job commission	\$20	-	-	-	Add	-
<input type="checkbox"/> Job created by	\$7000	John, Peter, Jose	-	Net price	-	- Copy Delete
<input type="checkbox"/> Appointment type	\$20	Rahul	Fitter	Gross price	-	-
<input type="checkbox"/> Account manager	\$20	Surya	-	Net price	-	-
<input type="checkbox"/> Job commission	10%	-	-	Net price	Absorb	-
<input type="checkbox"/> Job commission	\$30	-	-	Gross price	Add	-

Total records : 06

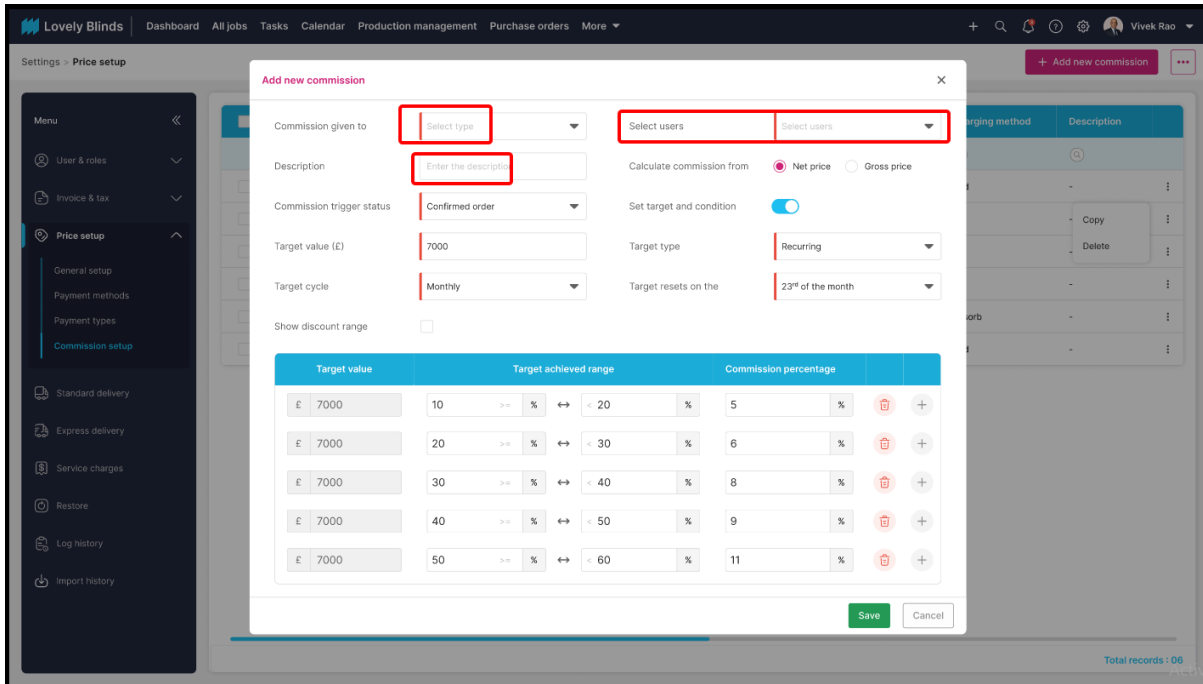
Copy and **Delete** are available for all types except Job Commission, which only supports Delete.

Settings > Price setup

Commission given to	Commission value	User	Appointment type	Calculate commission from	Charging method	Description
<input type="checkbox"/> Job commission	\$20	-	-	-	Add	- Delete
<input type="checkbox"/> Job created by	\$7000	John, Peter, Jose	-	Net price	-	-
<input type="checkbox"/> Appointment type	\$20	Rahul	Fitter	Gross price	-	-
<input type="checkbox"/> Account manager	\$20	Surya	-	Net price	-	-
<input type="checkbox"/> Job commission	10%	-	-	Net price	Absorb	-
<input type="checkbox"/> Job commission	\$30	-	-	Gross price	Add	-

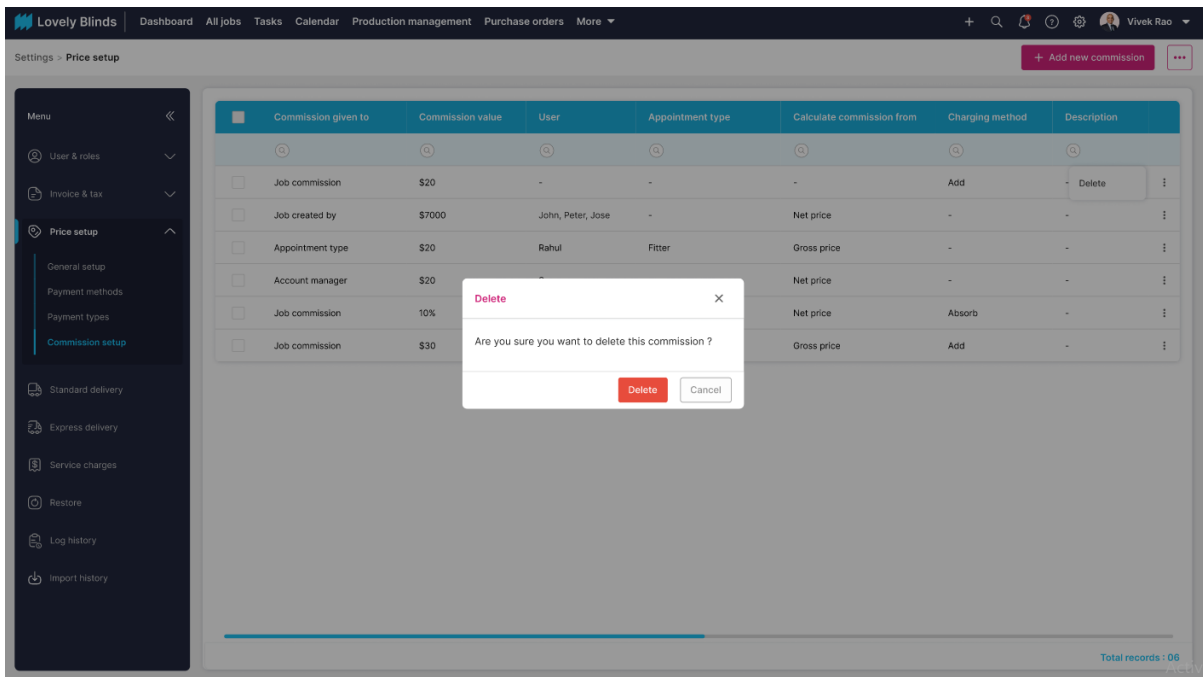
Total records : 06

Copying a commission opens a pre-filled popup where certain fields are reset.



Delete Scenario

Not Yet Started / Completed Commissions: Shows a standard confirmation message.

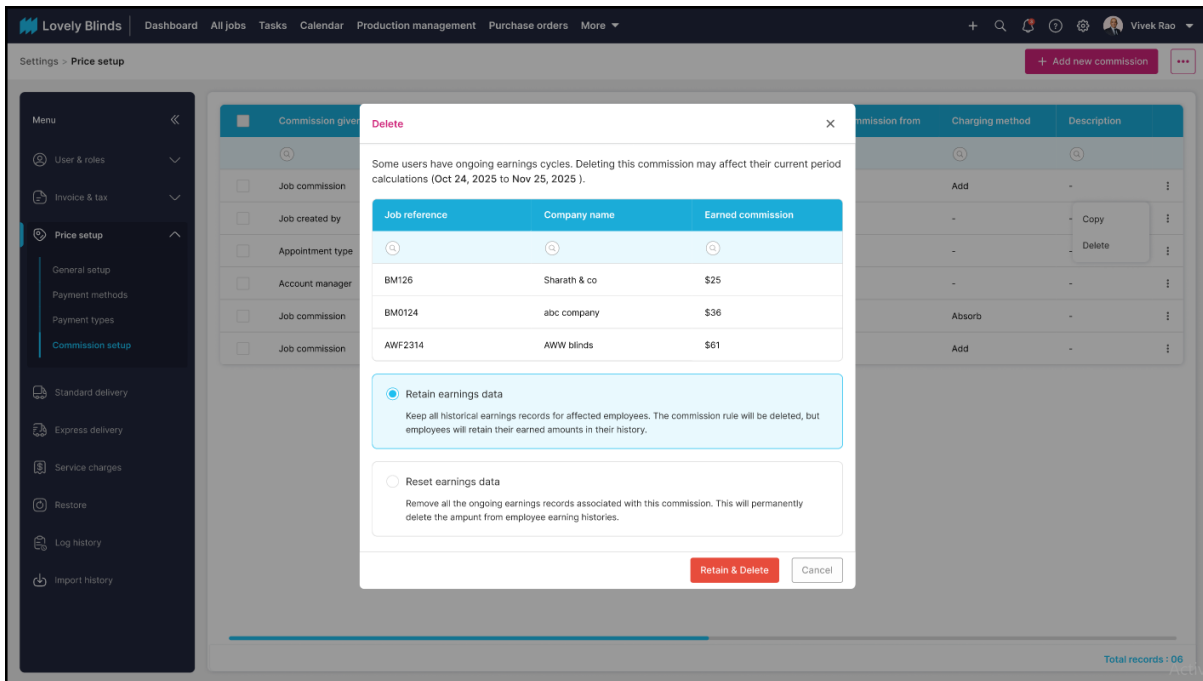


Active Commissions:

A popup displays earnings to date, with job and customer details.

Two options are provided:

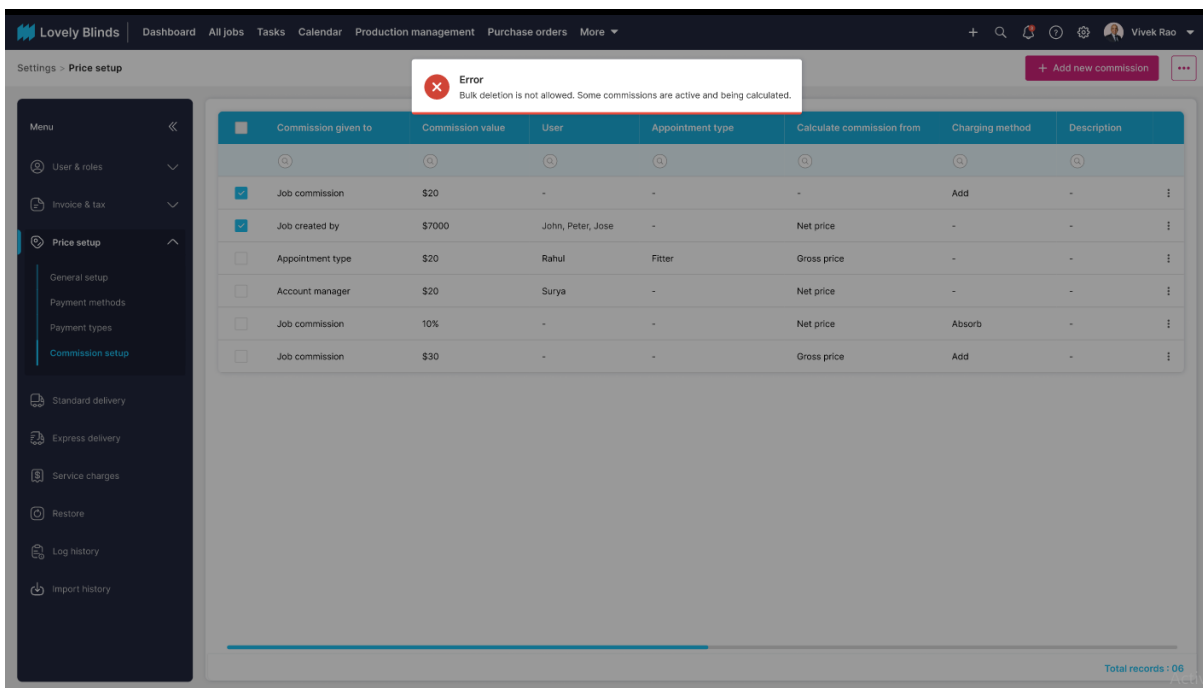
- **Retain Earnings:** Ends the commission cycle immediately and marks it as completed.
- **Reset Earnings:** Deletes earned data and does not add it to the user's account.



Here we show the user's name along with the current running cycle period. We show the earned commission till date with the respective Job (job ref) and customer (company name)

Bulk Delete:

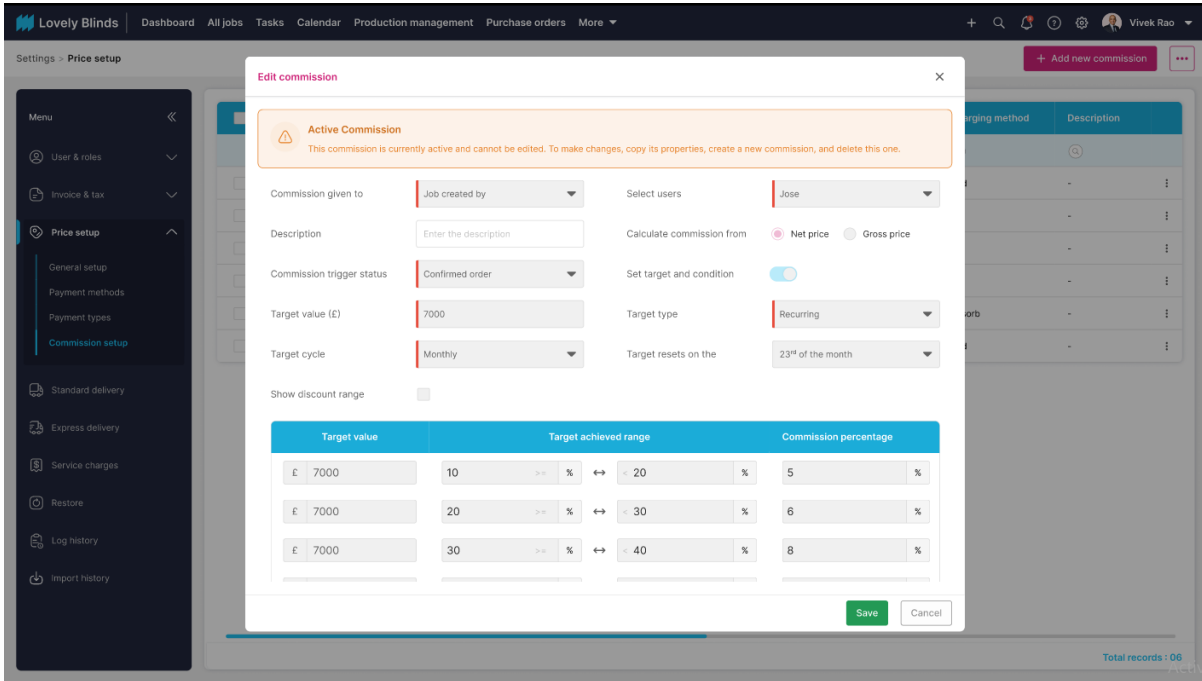
Active commissions cannot be bulk-deleted, and an error message is shown.



Running commission view

Active

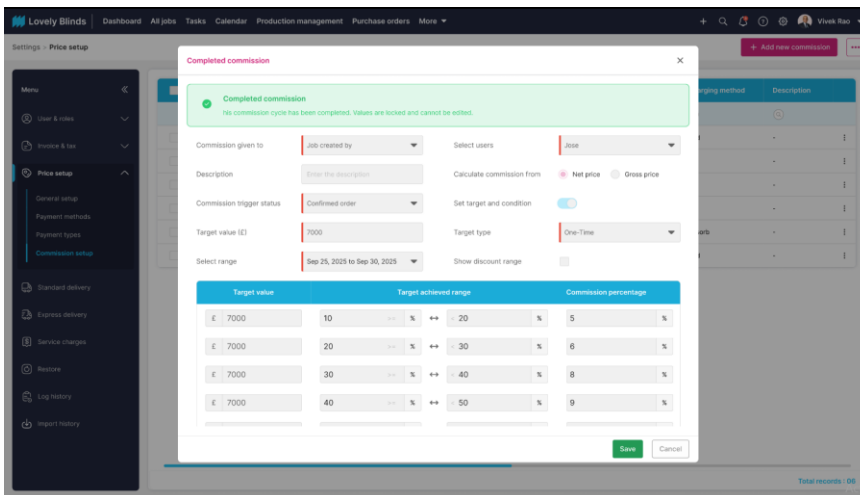
Fields are locked (except description), and a warning message is shown.



Completed

Applicable to “One-Time” target types.

Displays a completion message, the commission summary, and setup data (read-only).



Not Yet Started

All fields remain fully editable.

Settings > Price setup

Dashboard All jobs Tasks Calendar Production management Purchase orders More
+ 🔍 🗄️ 🕒 🌐 🧑 Vivek Rao

Menu

- 👤 User & roles
- 📄 Invoice & tax
- 🏠 Price setup
 - General setup
 - Payment methods
 - Payment types
 - Commission setup
- 📄 Standard delivery
- 📄 Express delivery
- 📄 Service charges
- 🔄 Restore
- 📄 Log history
- 📄 Import history

Edit commission ✕

Commission given to: Account manager Select users: Surya

Calculate commission from: Net price Gross price Commission trigger status: Confirmed order

Description: Set target and condition:

Target value (£): 7000 Target type: Recurring

Target cycle: Monthly Target resets on the: 23rd of the month

Show discount range:

Target value	Target achieved range	Discount range	Commission...
£ 7000	10 >= % ↔ < 20 %	0 >= % ↔ < 4 %	5 % 🗑️ +
£ 7000	20 >= % ↔ < 30 %	5 >= % ↔ < 9 %	6 % 🗑️ +
£ 7000	30 >= % ↔ < 40 %	9 >= % ↔ < 11 %	8 % 🗑️ +
£ 7000	40 >= % ↔ < 50 %	12 >= % ↔ < 13 %	9 % 🗑️ +
£ 7000	50 >= % ↔ < 60 %	14 >= % ↔ < 20 %	11 % 🗑️ +

Save
Cancel

Total records : 06