

## Tech Tip Tuesday—February 2, 2016

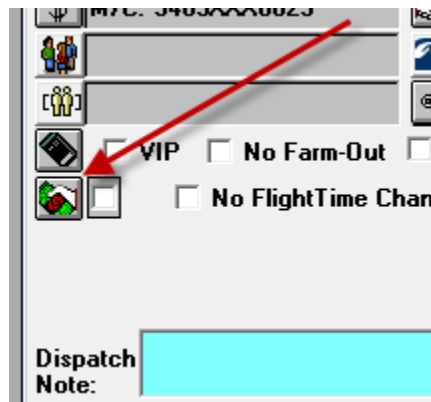
by David Hirsch

### Commission Agreements

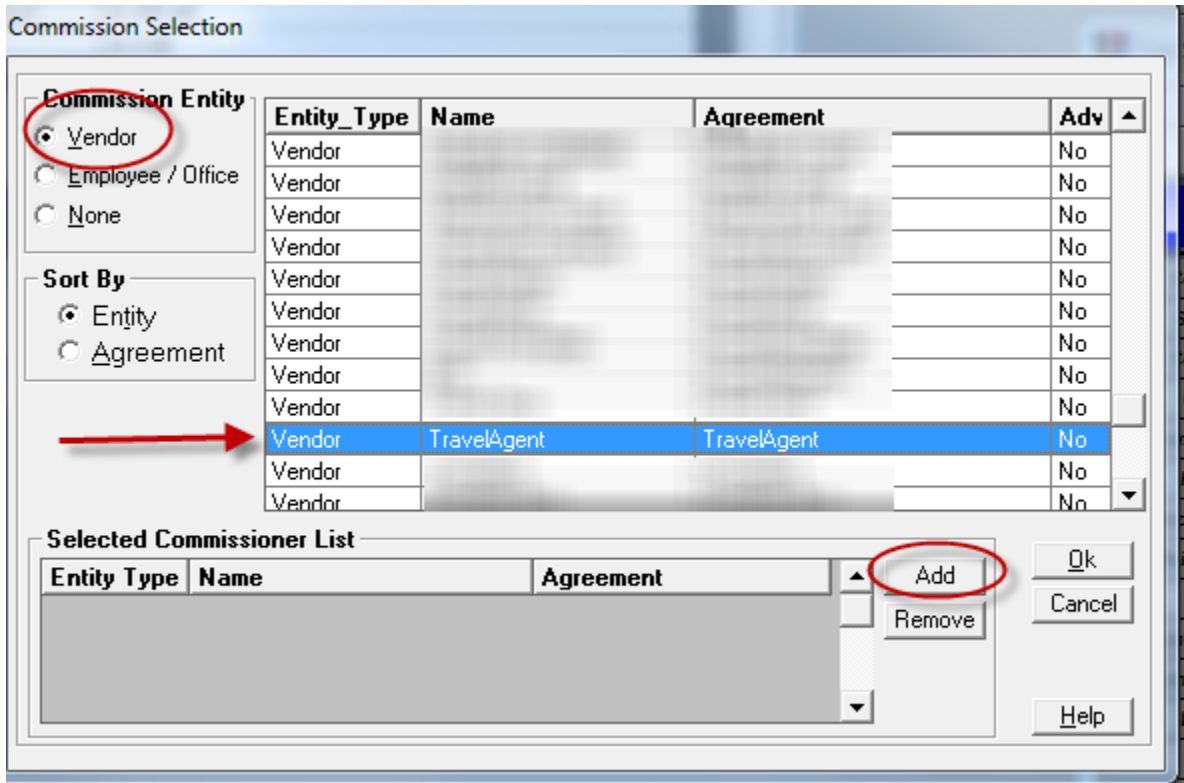
In last week's Tech Trip, we learned all about how to create a simple Commission Agreement. So, now that we have them...how do we use them?

The essential idea is that you need to attach the commission agreement to the trip. Then, in TripBook, the Commission tab will light up (and the commission will automatically be calculated). After that, commissions are processed in a manner similar to driver pay.

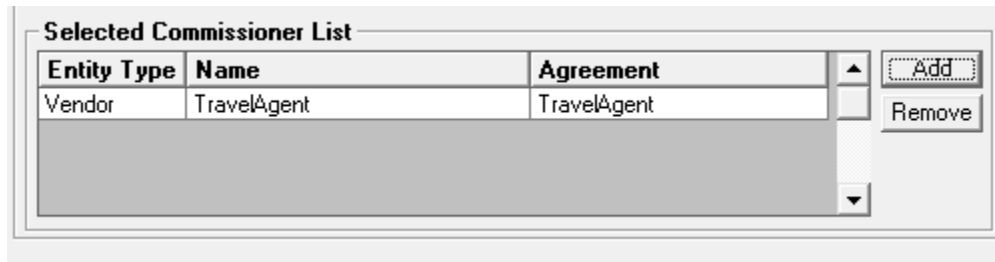
The simplest method is to just manually add the commission. When a trip is open, click on the Commission button (which is supposed to look like a hand holding a wad of cash).



Select the type of commission it is (Vendor in our example), then find the actual commission agreement, and click Add.



The selected commission agreement will then appear in the lower box.



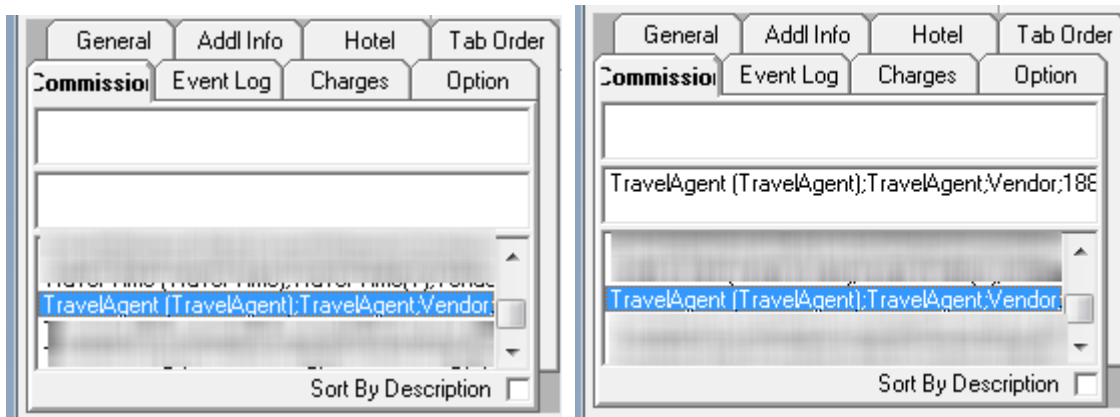
When a trip has a commission attached, the box next to the commission button will have a check-mark.



Now that we know the slow, tedious, manual way to add a commission agreement to a trip, how can we automate this?

If you have a particular contact that, whenever he or she books a trip, should automatically have a commission agreement attached to that trip, then all you need to do is add the agreement to the contact.

Open the contact record and select the Commission tab in the lower left. Find the commission agreement in the bottom box, and double-click it. It will add itself to the middle box.

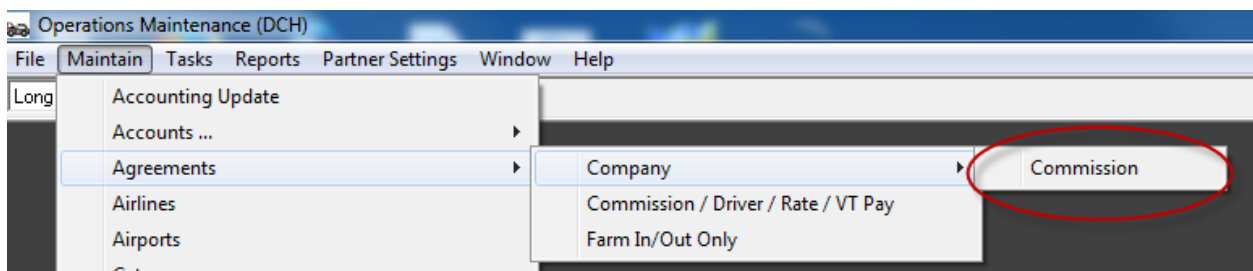


Now, every time that contact books a trip, the commission agreement will automatically attach itself.

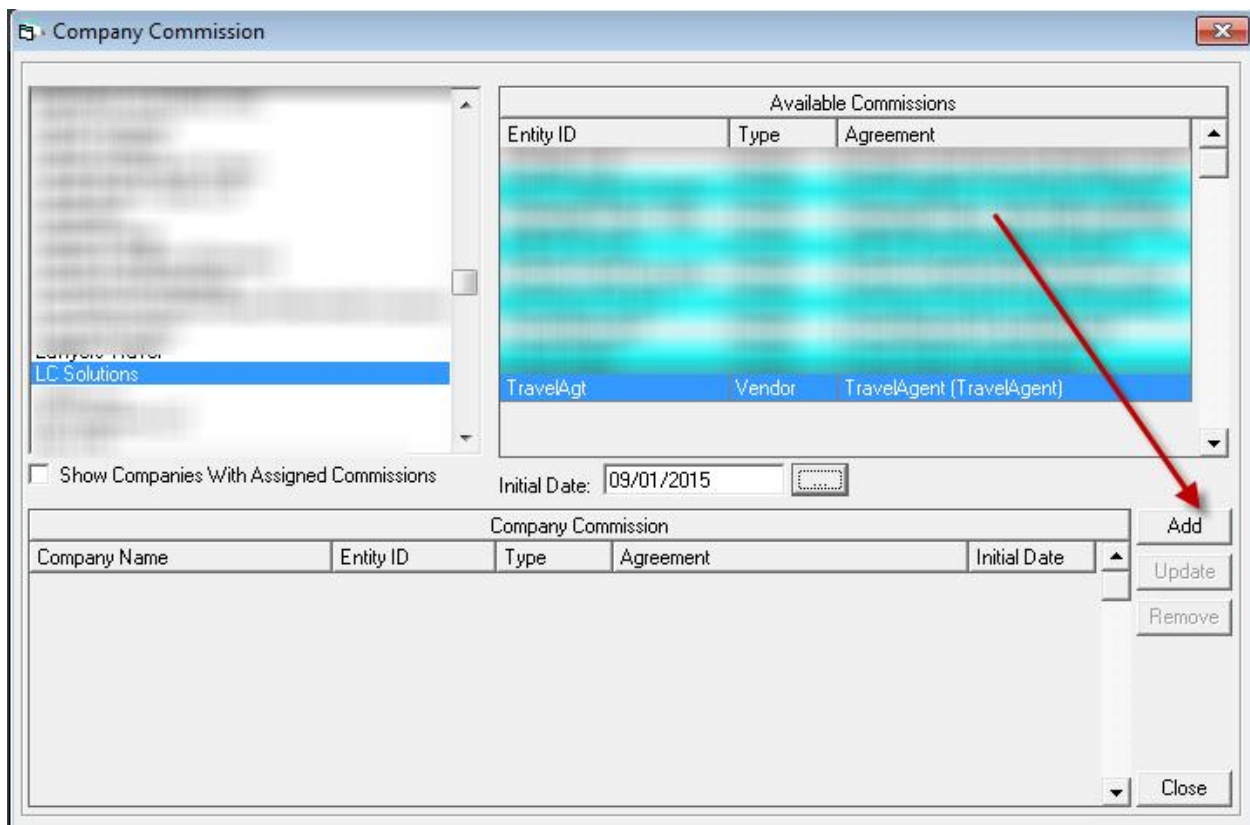
But what if you have a lot of contacts that all work for the same company, and you need to pay a commission no matter what contact books? And you want it automatically added even for new contacts for that company?

In that case, you need to go up a level—rather than attaching the auto-commission to each contact, you want to attach it to the company.

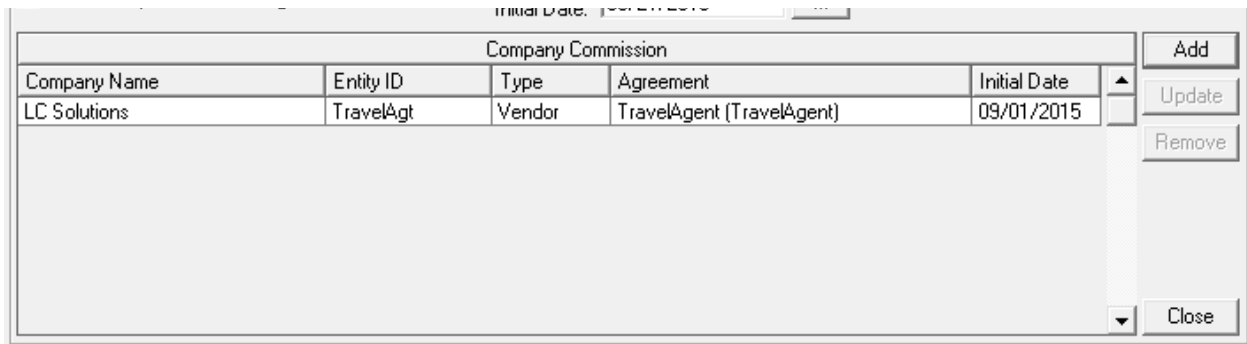
To do that, simply open Maintenance, and navigate to Maintain...Agreements...Company...Commission.



Select the company you want to automatically add the commission to on the left, and select the commission agreement on the right. Then click Add.



Once it is added, you will see it in the lower box.



Now, every time a reservation is made with that Company name (LC Solutions, in our example) the commission for TravelAgent will automatically be applied.

As you have seen, it takes a little time to properly set up a Commission Agreement and attach it to a trip. What happens if you have a brand new customer—a travel agent, say—who calls up and wants to book right then, but wants to make sure he/she will be paid a commission.

You may not want to take the time to set up the whole commission agreement right then—indeed, the reservation agent on the phone may not even have the ability or permission to do so. But, you want to get the trip booked, and you don't want to forget about the commission. In that case, the reservationist, after creating the contact, simply needs to click on the "Commission Required" box at the top of the contact screen.



This will tell TripBook that there needs to be a commission on the trip. When the trip is ready to be closed, if there is no commission agreement attached, TripBook will give a warning and not allow the trip to be closed.

