

Setting up Burden Rates in the Commission Module

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Note TempWorks is no longer offering new installations of the Enterprise Commission Module.

What is the Commission Module?

The commission module is designed to help users calculate commission accurately and efficiently, while allowing more flexibility on formulas utilized to produce commission results per company. Along with customized commission calculation plans, the commission module makes reporting and tracking easy.

Note The commission module, like most Enterprise modules, may require additional licensing and setup in your system. Please contact your Account Manager or TempWorks representative for more information.

The commission module requires the security role 'Commission Module' or related role that will grant the user access to viewing the Commission Module information.

New to Commission Module? Check out the [Commission Module Overview](#) first.

What are Burden Rates?

The burden rate consists of indirect costs associated with employees, over and above gross compensation or payroll costs. Typical costs associated with the burden rate include payroll taxes, workers' compensation and health insurance, paid time off, training and travel expenses, vacation and sick leave, pension contributions and other benefits. The burden rate provides a truer picture of total labor costs than payroll costs alone.

Via Investopedia

Why Set Up Burden Rates?

The commission module allows you to set up burden calculations to subtract the extra costs from revenue before calculating commission earned. This creates a more accurate commission calculations.

This article covers:

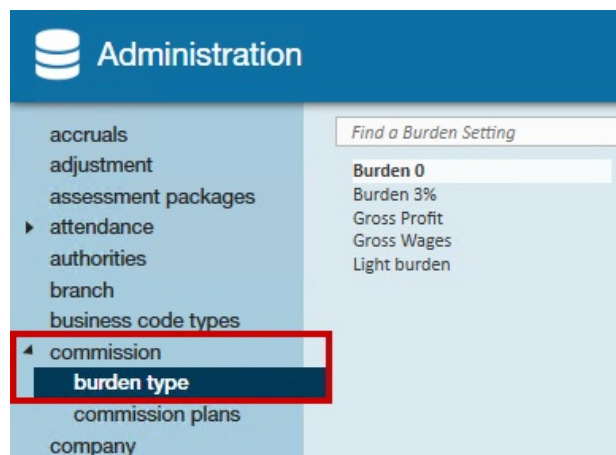
1. Burden Setup
2. Adding Burden Rates to Customers
3. Adding Burden Rates to Orders
4. Adding Burden Rates to Assignments

Setting Up Burden Rates

In this area, users will define a basic way to calculate burden for the purpose of calculating commission. Burden costs are costs associated with employees beyond payroll costs. Users will want to subtract burden costs from revenue before calculating commission.

To Find Burden Setup

1. In Enterprise, Navigate to All Options > Administration
2. Select Commission
3. Select Burden Type



Adding a Burden Type

You can set up various different burden types that can be applied to different hierarchy levels, customers, orders, or assignments. For example, some customers or jobs may have higher associated costs that need to be calculated differently for commission purposes.

1. Select the + in the upper right to add a new burden type
2. Enter the following information

Burden Settings	
Description	Heavy Burden
Burden Amount	.30
Amount Type	Amount Per Hour
Hier Level	System
Base Amount Upon	<input checked="" type="radio"/> Pay <input type="radio"/> Bill
Use as the default for new customers	<input type="button" value="No"/>

- o *Description* - name of burden type (identifier when picking it for select customers, etc.)
- o *Burden Amount* - flat rate or % depending on amount type below

- *Amount Type* - there are 3 amount options:
 1. Percent - percentage of total payroll or billing costs (ex. 10% of total payroll costs)
 2. Amount Per Hour - Dollar amount that will be calculated based on number of hours worked (.20 per hour worked)
 3. Flat Amount - Dollar amount that is a flat fee (\$50)
 - *Hier Level* - Which hierarchy does this burden apply to? (ex. entire system or just one entity)
 - *Base Amount Upon* - This only applies to burden rates using the percentage option
 - *Use as the default for new customers*- If set to yes, this will be the default burden rate. Remember that only one type can be set as the default
3. Select Save in the upper left (or use CTRL + S)

Note If you do not wish to apply a burden type, users may select the None option in the burden type selection

Once you have setup your burden types in Administration, you will need to apply those burdens to the customer, order, and/or assignment records.

Applying Burden Types to Customer Records

Burden types can be set up on the customer record to default for all new orders created. This can help make set up easier for calculating burden rates.

commission defaults

Burden

Description	Amount	Type	Calculate On Pay
Burden 0	0	Percent	Yes
Burden 3%	3.00	Percent	Yes
Gross Profit	4.00	Percent	No
Gross Wages	0.20	Amount Per Hour	Yes
Heavy Burden	0.30	Amount Per Hour	Yes

Updating Burden Types on the Customer Record

1. Navigate to the customer record you want to change the burden rate for
2. Select Details > Sales & Service
3. Select the Burden drop down under Commission Defaults

Buy N Large (Primary)

! Remember to
! Call Andrea B

123 Main St.
 Cokato, MN 55321
 (123) 456-7890

ID: 4295013744
 Branch: Hennepin East

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▶ tasks a

visifile
 details
 assignment restrictions
 attendance
 contact methods
 departments
 interest codes
sales & service
 education
 vendor management
 worksites
 defaults
 documents
 integrations
 invoice history
 invoice setup
 evaluations
 messages
employee
customer
 order
 assignment
 contact
 pay / bill

sales information

Account Manager	amelia.stout
Branch	Hennepin East
Sales Team	Default
How Heard Of	Sales call
How Heard of Detail	Cold call to Shelby
Competition	
Business Code	Production

sales pipeline details

Pipeline Status	Relationship Building	
Percent Complete	10	
Sales Contact	Forthright, Shelby	
Estimated Value	\$1,000.00	Monthly
Generate Contract		

commission defaults

Burden	Heavy Burden
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Note This default will only apply to all new orders created after saving. All existing orders/assignments will need to be updated manually.

Also, remember to set burden defaults for *each* department on a customer to ensure burden rates are defaulting.

Applying Burden Types to Order Records

Burden rates on any new order created default from the burden rate of the customer. If the customer does not have a set burden rate or if this order's burden is different, you can change the burden type from the order record. This type will default for all new assignments created on this order.

Burden	Light burden	Unit Bill Rate	\$0.00	Unit Pay Rate	\$0.00
	Description	Amount	Type	Calculate On Pay	
	Burden 0	0	Percent	Yes	
	Burden 3%	3.00	Percent	Yes	
Assigned	Gross Profit	4.00	Percent	No	
	Gross Wages	0.20	Amount Per Hour	Yes	
	Heavy Burden	0.30	Amount Per Hour	Yes	
	Light burden	10.00	Flat Amount	Yes	

Updating Burden Types on the Order Record

1. Navigate to the order record you want to change the burden type for
2. Select Details
3. Select the burden drop down under Customer Information

Applying Burden Types to Assignment Records

Burden types set on the assignment record are by far the most important because they calculate the the burden before commission is applied. Assignment burden types are defaulted from the order record but can be overridden for a particular assignment.

Burden	Doubletime Bill	\$5			
	Description	Amount	Type	Calculate On Pay	
	Burden 0	0	Percent	Yes	
	Burden 3%	3.00	Percent	Yes	
	Gross Profit	4.00	Percent	No	
	Gross Wages	0.20	Amount Per Hour	Yes	
	Heavy Burden	0.30	Amount Per Hour	Yes	
	Light burden	10.00	Flat Amount	Yes	

Updating Burden Types on the Assignment Record

1. Navigate to the assignment you wish to update the burden for
2. Select the Burden drop down under Assignment Information


Ann, Polly
 Buy N Large, Traffic Coordinators
 Assignment ID: 4301403748 Employee ID: 4295037447
 Order ID: 4295089965 Branch: New Brighton

Remember to b
 Call Andrea Ba

+ ↓ ↺ ★ ↻ 🔍 ↑ ↓ ▶ tasks ap

details
 accruals
 adjustments
 calls
 commission allocations
 ▶ integrations
 messages
 tasks
 search

assignment information

Employee	Ann, Polly	
Aldent	4295037447	
Customer	Buy N Large	
Department	Space Technology & Services	
Order ID	4295089965	
Assignment ID	4301403748	Alt Assignment ID
Burden	Heavy Burden	
Temp Phone	() - -	
Status	Open	

Have all your burden types applied? The next step is [Creating Commission Plans](#).

Related Articles