

HKB2B Limited

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Agent Commission

Add new agent



Commission	E	💿 🗴 🔐 🗛 💳			
Page Menu 👻	📃 🔛	8 🖬 î 🖭		to croato a now ag	ont
Agent		List New Report	Press < New>	, to create a new age	
Code and name keyword	Input ke	eyword and press [Enter] will filter following	list		Agent count : 10
			Agent list		
Agent code	Agent name	Directly under	Map heard about company channel	Last updated	Action
СН	Cindy Ho	Sandy Lam (SL)	СН	13-Nov-2018 11:00 Ivy Lee (beauty)	Edit
DH	Danny Ho	Cindy Ho (CH)	DH	19-Nov-2018 11:56 Ivy Lee (beauty)	Edit
EW	Emily Wong	Danny Ho (DH)	EW	19-Nov-2018 10:04 Ivy Lee (beauty)	Edit
FC	Fiona Chan	Emily Wong (EW)	FC	19-Nov-2018 10:04 Ivy Lee (beauty)	Edit
GN	Grace Ng	Fiona Chan (FC)	GN	19-Nov-2018 10:05 Ivy Lee (beauty)	Edit
HC	Hazel Chan	Grace Ng (GN)	НС	19-Nov-2018 10:05 Ivy Lee (beauty)	Edit
IL	Iris Lam	Hazel Chan (HC)	IL	19-Nov-2018 17:22 Ivy Lee (beauty)	Edit
Л	Janice Lam	Iris Lam (IL)	Л	19-Nov-2018 10:08 Ivy Lee (beauty)	Edit Delete
МН	Mary Ho	Own	МН	19-Nov-2018 11:26 Ivy Lee (beauty)	Edit

Commission	Y 💽 🕃 🥃 +文				
Agent List New Report					
	New agent Input the Agent code and Agent name.				
Agent information					
Agent code	(Maximum 50 characters)				
Agent name	(Maximum 250 characters)				
Agent email	Choose the organization the agent belongs to				
Organization					
Directly under					
Map heard about company channel (Member select this heard about company channel represent member using this agent)	Choose which agent to be under of. If the new agent				
Payment information	is not under any other agents choose "Own"				
Payment by	Cheque O Bank transfer				
Cheque payee (Maximum 250 characters)					
Bank account no Bank account name This is the	member field where a member maps her corresponding agent.				
•					
Commission rules					
Lumpsum commission setup	Setup A				
Override subordinate commission setup	Setup				
	Submit Reset Cancel				
	These are the settings for commissions rules. We will go				
Dross (Cubmits to finish adding the new ag	ant				
Press < Submit> to mism adding the new age	over them later.				
Payment information of the	e agent can be entered under the `Payment Information'				
section. It will be sh	nown in the footer of the agent commission report.				

Add commission rules – Lumpsum commission





1. <u>Lumpsum com</u> r	mission ru	le – any amoi	unt	Select the start day and period for the					
This commission rule w	vill be appl	ied to every ir	ndividual item.	commission rule.					
Start date		Oct 🗸 -	Oct V . 2018						
Agent get commission period		All period	All period O Specified period (1st time within time Afterwards)						
Use lumpsum calculate agent commission		 ○ All payme ● All payme 	○ All payment include selected items ● All payment not include selected items						
Agent commission rate		 Any amore 	Any amount get 10 %						
Different items have different agent commission rate		Setup	Setup						
Lumpsum calculate amount		 Below (< From (> Above (> 	Below (<) \$get% From (>=) \$to (<) \$get% Above (>=) \$get%						
Include items		Setup							
				Select the agent commission rule. Here, 10%					
			Submit A Reset 🔝 Close	commission for all items is selected.					
HKB2B User experience system 1 Agent commission report	1	ommission rule		Print On : 20-Nov-2018 Prepared by : beauty Page 1 of 2					
Agent : Sandy Lam		Invoice shop :	All	Invoice date / Payment date : 20-Nov-2018 to 20-Nov-2018					
Invoice no : All to All		Member code	All to All						
Invoice Invoice Member shop no Invoice date Member code name	Referred by Referred by member member code name	Item Join date code Item name	ist Non ist Item purchase purchase Quantity amount amount amount	Non First treatment Treatment Lumpsum a purchase purchase Remaining done Payment calculate Payment Payment Agent Agent a amount amount balance date amount amount no date % commission Status F					
Sandy Lam (SL) - SL				\frown					
CWB PSI- 20-Nov-2018 WeM- 00172 00036HK		5-Sep-2018 T01 透明實驗證約 国部	2供原復程 - 1 \$2,500.00 \$0.00 \$2,500.00 Subtotal: \$2,500.00 \$0.00 \$2,500.00	0 \$2,500.00 1 \$2,500.00 10% \$250.00 0 \$0.00 \$2,500.00 \$0.00 \$250.00 \$250.00					
				Total commission for Sandy Lam (SL) - SL : \$250.00					
		Commi	ssion for Sandy Lam (SL	L) is now \$250, 10% of the \$2500 payment amoun					

2. Lumpsum commission rule – less than

This commission rule will be applied to the lumpsum amount.

Start date	Oct - 2018					
Agent get commission period	All period O Specified period (1st time within time Afterwards)					
Use lumpsum calculate agent commission	O All payment include selected items O All payment not include selected items					
Agent commission rate	O Any amount get %					
Different items have different agent commission rate						
Lumpsum calculate amount	• Below (<) \$ 5000 get 8 • From (>=) \$ to (<) \$ get • Above (>=) \$ get					
Include items						
Glick Submit to finish adding the commission rule.						
HKB2B User experience system 11 Agent commission report Agent : Sandy Lam Invoi Invoice no : All to All Memi	Print On : 20-Nov-2018 Prepared by : beauty Page : 1 of 2 e shop : All Invoice date / Payment date : 20-Nov-2018 to 20-Nov-2018 er code All to All					
Referred by Referred by member Referred by shop no Invoice date Member code Member name code member name Join date cod	Non First 1st Non 1st treatment Treatment treatment Item purchase purchase purchase Remaining done Payment calculate Payment Agent Agent Item name Quantity amount amount amount amount balance date amount no date % commission Status Remark					
Sandy Lam (SL) - SL						
CWB PSI- 20-Nov-2018 WeM-00036HK 5-Sep-2018 T01 00172	透明質較效保温療程-面 1 \$2,500.00 \$0.00 \$2,500.00 1 \$2,500.00 ber \$0.00					
CWB PSI- 00173 20-Nov-2018 WeM-00036HK 5-Sep-2018 T02	○ 西南老毛板再生重整 - 面南 1 \$2,300.00 \$2.300.00 \$2,300.00 \$2,300.00 1 \$2,300.00 \$2,300.00 ber \$0.00 ··· ···					
	Subtotal: \$4,800.00 \$0.00 \$4,800.00 \$4,800.00 \$4,800.00 \$4,800.00 \$4,800.00					
	Lumpsum commission					
	All period amount (\$4,800.00) below (<) \$5,000.00, get 8% \$384.00					
Commission for Sondy Lom (SL) is now (2)	84.8% of the \$4800 lumpsum sizes					
according to the rule, \$4800 is less than the \$5000 level.						

3. Lumpsum commission rule - from ... to ...

This commission rule will be applied to the lumpsum amount.



\$2,500.00

\$2,300.00

\$2,000.00

\$6,800.00

Subtotal :

\$2,500.00

\$0.00

\$0.00 \$2.300.00

\$0.00 \$2,000.00

\$0.00 \$6,800.00

\$2,500.00

\$2,300.00

\$2,000.00

\$0.00 \$6,800.00

Commission for Sandy Lam (SL) is now \$816, 12% of the \$6800 lumpsum, since according to the rule, \$6800 is between \$5000 and \$10000.

5-Sep-2018

5-Sep-2018 T02

5-Sep-2018 ET01

T01

透明其酸镁效果是度是 - 面部

抗衰老损险再生療種 - 国部

Eye Treatment A

2 <u>\$2,000.00</u> <u>\$2,000.00</u> ber <u>\$0,000</u> **90.00 \$6,800.00 \$6,800.00 100**

\$0.00

\$0.00 --- ---

\$2,500.00

\$2,300.00

\$2,500.00

\$2,300.00

4. Lumpsum commission rule – more than

. PSI-00172 20-Nov-2018 WeM-000

CWB

CWE

P5I-00173 20-Nov-2018 WeM-00036Hk

PSI-00174 21-Nov-2018 WeM-00036H

This commission rule will be applied to the lumpsum amount.



Include / Exclude item from commission rules

Users have the option to:

- 1) exclude specific items that are within the commission rules, and
- 2) include specific items that are not within the commission rules

1. Exclude items

In this example, we are trying to exclude the treatment T01 from the commission rule `above >= \$20000 get 15%'.

				Lumpsum commissio	n setup list				
Start date Ag	ent get commission period	Use lumpsum calculate agent co	ommission	Agent co	mmission rate	Diffe	erent items have different agent cor	mmission rate	Action
Nov-2018	All period	All payment not include select	All payment not include selected items		rems from (>=) \$10000 to (<) \$20000 get 10%				Edit Delete
Nov-2018	All period	All payment not include select	ted items	above (>=)	\$20000 get 15%		Selected item View		Edit Delete
Oct-2018	All period	All payment not include select	ted items	below (<)	\$10000 get 5%		No selected item		Edit Delete
				Edit lumpsum commi	ssion setup				
Start date			Nov 🗸 _ 2018						1.1.1
Agent get commission pe	riod		● All period ○ Spe	ecified period (💿 1st time	✓ ○ within time	 Afterwards))	Click <e< td=""><td>ait>.</td></e<>	ait>.
Use lumpsum calculate ag	gent commission		O All payment includ	de selected items					
Agent commission rate			All payment not in	ciude selected items		1			
Different items have diffe	rent agent commission rat-		Any amount get	1%		Make si	ure 'All payment	not include	selected
Lumpsum calculate amou	int								
			O From (>=) \$	get76	get %	items' is	s selected.		
			Above (>=) \$ 20	0000 get 15	%				
Include items		Х	Setup						
Click <setup> under 'Include items'.</setup>									
Code, name and category	keyword T01	Search to Input keyword and press [Enter] will filt	er following list	m 101.				< Press here to display sel	ected item > Item count : 3
				Item list					
						< Press here to	o select all item> < Press bere to	remove all item>	
Item nature 🔯	Item code	Item name		Item category			Selected item		
Treatment	T01 j	透明質酸強效保濕療程 - 面部	General Tr	eatment					
Flexi Treatment	EFT01 I	Eye Flexi Treatment A							
Treatment	ET01 I	Eye Treatment A	Eye Treatm	nent					
	Treatment ET01 Eye Treatment A Eye Treatment Image: Click < Close > and then < Submit >. Select the treatment item T01.								
HKB2B User expen Agent commission Organization : Invoice date / Payment date :	rience system 11 n report All 1-Nov-2018 to 30-Nov-2018	Agent Invoice	: : no :	Cindy Ho All to All		Invoice Member	shop : All r code : All to All	Print On : Prepared by : Page :	28-Nov-2018 beauty 1 of 1
Invoice Invoice shop no Invoice	Member date code Member name	Referred by Item member Referred by Item code member name Join date code	Item name	Item pu Quantity amount a	Non 1st Non 1st treatment T urchase purchase purchase amount amount amount	Treatment tre purchase Remaining amount balance	First Lumpsum done Payment calculate date amount amount Pays	Payment nent no date Agent	Agent % commission Status Remarl
Cindy Ho (CH) - CH CWB PSI- 12-Nov- 00167	-2018 WeM-00007 Mei	7-Sep-2013 T01	透明質酸強双保湿療程。)	面部 10 \$25,000.00	\$0.00 \$25,000.00 \$2 \$0.00 \$25,000.00 \$0.00 \$25	25,000.00 10 5,000.00	\$25,000.00 \$25,000.00 \$25,000.00 \$25,000.00 Total commi	,ba ssion for Cindy Ho (CH) - C	r \$0.00
Even	when the lun 15	npsum amount mee 5%), T01 is not inclu	ts the cor ded in coi	nmission cri mmission ca	teria (above lculation.	\$20000	get		

2. Include items

In this example, we are trying to include only the treatment ET01 into the commission rule `above (>=) \$2000 get 10%'.

	Lumpsum commission setup list										
Start date	Agent get commission period	Use lumpsum calculate	agent commission	Agent commission rate	Different items have different	agent commission rate	Action				
Oct-2018	All period	All payment include	All payment include selected items		No selected	item	Edit Delete				
							7				
			Edit lun	npsum commission setup							
Start date			Oct 🗸 - 2018	Oct ▼ - 2018							
Agent get com	mission period		\odot All period \bigcirc Specified p	All period O Specified period (1st time O within time O Afterwards)							
Use lumpsum o	alculate agent commission		All payment include select All payment not include se	ted items							
Agent commiss	sion rate		O Any amount get	%							
Different items	have different agent commission rate		Setup		Make sure 'All pa	yment include sele	ected items'				
Lumpsum calcu	ulate amount		O Below (<) \$	get %	is coloring						
			O From (>=) \$	to (<) \$get	s selected.						
			• Above (>=) \$ 2000 get 10 %								
Include items		~ ~	Setup								
Click	< <setup> under 'Inclu</setup>	ude items'.	🚺 Submit 🗐	Reset 🔞 Cancel 🔣 Close							



HKB2E	User ex	perience system 11														Print O Prepared b	in: 28-N	ov-2018	
Agene	commis															Pac	e: 1 of	1	
Organizatio Invoice dat	n : : / Payment da	All te : 1-Nov-2018 to 30-Nov-2018			Age Inve	oice no :	Janice Lam All to All						Invoice shop : Member code :		All All to All				
Invoice sho	p Invoice no	Invoice date Member code Member name	Referred by member code	Referred by member name	Join date	Item code Item name	Quantity	Item amount	1st purchase amount	Non 1st t purchase amount	Non reatment purchase amount	Treatment purchase amount	First Remaining treatment balance done date	Payment amount	Lumpsum calculate amount Payment no	Payment date	Agent %	Agent commission	Status Remark
Janice Lan	(JL) - JL														\frown				
CWB	PSI-00178	28-Nov-2018 WeM-00015 Mac Lam			26-Sep-2013	B ET01 Eye Treatment	A 3	\$3,000.00	\$0.00	\$3,000.00		\$3,000.00	3	\$3,000.00	\$3,000.00		,bar	\$0.00	
CWB	PSI-00179	28-Nov-2018 WeM-00015 Mac Lam			26-Sep-2013	8 ET02 Eye Treatment	В 2	\$2,000.00	\$0.00	\$2,000.00		\$2,000.00	2	\$2,000.00	\$2,000.00		,bar	\$0.00	
							Subtotal :	\$5,000.00	\$0.00	\$5,000.00	\$0.00	\$5,000.00		\$5,000.00	\$5,000.00	Lumpsum con	nmission	\$0.00	
												AI	l period, include selec	ted items am	ount (\$3,000.00) above	(>=) \$2,000.00, (get 10%	\$300.00)
															Total commission	n for Janice Lam ((JL) - JL :	\$300.00	
H	Here, the lumpsum amount totaled \$5000, which consists of ET01 (\$3000) and ET02 (\$2000).																		

Since we have only included ET01 in the commission rule, only ET01 is used for commission calculation ($$3000 \times 10\%$), instead of the whole lumpsum (\$5000).

Subordinate Commission Setup

1. Setup the agent ladder

```
Go to Agent > Commission > List
```

Agent	ent List New Report									
Code and name keyword		Input keyword and press [Ent	er] will filter following list			Agent count : 10				
				Agent list						
Agent code	Agent name	Organization	Directly under	Map heard about company channel	Last updated	Action				
СН	Cindy Ho		Sandy Lam (SL)	СН	13-Nov-2018 11:00 Ivy Lee (beauty)	Edit				
DH	Danny Ho		Cindy Ho (CH)	DH	26-Nov-2018 12:07 Ivy Lee (beauty)	Edit				
EW	Emily Wong		Danny Ho (DH)	EW	26-Nov-2018 12:51 Ivy Lee (beauty)	Edit				
FC	Fiona Chan		Emily Wong (EW)	FC	19-Nov-2018 10:04 Ivy Lee (beauty)	Edit				
GN	Grace Ng		Fiona Chan (FC)	GN	19-Nov-2018 10:05 Ivy Lee (beauty)	Edit				
HC	Hazel Chan		Grace Ng (GN)	HC	19-Nov-2018 10:05 Ivy Lee (beauty)	Edit				
IL	Iris Lam		Hazel Chan (HC)	IL	19-Nov-2018 17:22 Ivy Lee (beauty)	Edit				
JL	Janice Lam		Iris Lam (IL)	Л	28-Nov-2018 16:42 Ivy Lee (beauty)	Edit				
MH	Mary Ho		Own	МН	27-Nov-2018 14:45 Ivy Lee (beauty)	Edit				
SL	Sandy Lam		Mary Ho (MH)	SL	27-Nov-2018 16:35 Ivy Lee (beauty)	Edit				

Click on the Agent name

Back | View Edit Sub agent list | Member list Report Agent Click <Edit> Edit agent Agent information Agent code SL Select the agent to be directly under of. In this example, 4 Sandy Lam Agent name Agent email Sandy Lam will be directly under Mary Ho. Organization V New Mary Ho (MH) 🗸 Directly under Map heard about company channel (Member select this heard about company channel represent member using this agent) SL 🗸 New Payment information ○ Cheque ● Bank transfer Payment by Cheque payee (Maximum 250 characters) Bank of China Bank name (Maximum 250 characters) Bank account no 999-876543-2 (Maximum 250 characters) Bank account name Lam Shan Shan (Maximum 250 characters) Commission rules Lumpsum commission setup Override subordinate commission setup Click <Submit> Submit 🚺 Reset

Agent List New Report				Repeat on different agents to co					
Code and name keyword		Input keyword and press [Enti	erj will fliter following list						
Agent list									
Agent code	Agent name	Organization	Directly under		Map heard about company channel	Last updated	Action		
СН	Cindy Ho		Sandy Lam (SL)		СН	13-Nov-2018 11:00 Ivy Lee (beauty)	Edit		
DH	Danny Ho		Cindy Ho (CH)		DH	26-Nov-2018 12:07 Ivy Lee (beauty)	Edit		
MH	Mary Ho		Own		МН	27-Nov-2018 14:45 Ivy Lee (beauty)	Edit		
SL	Sandy Lam		Mary Ho (MH)		SL	27-Nov-2018 16:35 Ivy Lee (beauty)	Edit		

In this example, the agent ladder is: Mary Ho > Sandy Lam > Cindy Ho > Danny Ho

2. Setup Subordinate commission rules

Agent	Agent List New Report									
Code and name keyword		Input keyword and press [Ent	er] will filter following list							
	Agent list									
Agent code	Agent name	Organization	Directly under	Map heard about company channel	Last updated	Action				
СН	Cindy Ho		Sandy Lam (SL)	СН	13-Nov-2018 11:00 Ivy Lee (beauty)	Edit				
DH	Danny Ho		Cindy Ho (CH)	DH	26-Nov-2018 12:07 Ivy Lee (beauty)	Edit				
MH	Mary Ho		Own	МН	27-Nov-2018 14:45 Ivy Lee (beauty)	Edit				
SL	Sandy Lam		Mary Ho (MH)	SL	27-Nov-2018 16:35 Ivy Lee (beauty)	Edit				
		Click the	e agent name, <mary< td=""><td>/ Ho> in this example.</td><td></td><td></td></mary<>	/ Ho> in this example.						
Back View	Edit Sub a	igent list Meml	ber list							
	(Click <edit></edit>								

In this example, we will let Mary Ho, leader of 3 subordinates, receive **1% commission** from all 3 of them, when she has made more than \$0 sales in the month.

	p									
Agent	igent List New Report									
	Override subordinate commission setup list									
Start date		Commission override	Action							
Nil setup										
		New override subord	nate commission setup							
Start date		Nov 🗸 - 2018								
Get override subordinate o	Get override subordinate commission conditions Own sales > V \$ 0									
Commission override Subordinate first Level/s : (Nil setup) Subordinate second Level/s : (Nil setup) Setup Select the criteria for the commission. Here,			commission. Here, Mary needs her s	ales above						

	Subordinate third Level/s Subordinate forth Level/s	: (Nil setup) Setup : (Nil setup) Setup	\$0 in the month to receive commissions from her subordinates.
Click <setup> under</setup>	Subordinate fifth Level/s Subordinate sixth Level/s	: (Nil setup) Setup : (Nil setup) Setup	
Subordinate first levels	Subordinate seventh Level/s Subordinate eighth Level/s	: (Nil setup) Setup : (Nil setup) Setup	
	Subordinate nineth Level/s Subordinate tenth Level/s	: (Nil setup) Setup : (Nil setup) Setup	

👔 Submit 🕡 Reset 🛛 🗵 Close

New lumpsum commission setup (Subordinate first Level/s)			
Start date	Nov-2018		
Agent get commission period	All period Specified period (1st time	e 🗸 🔿 within 🚺 time 🗸 🔿 Afterwards)	
Use lumpsum calculate agent commission	• All payment include selected items • All payment not include selected items		
Agent commission rate	Any amount get	Input 1%, since Mary is getting 1% commission of	
Different items have different agent commission rate	Setup	her subordinate sales.	
Lumpsum calculate amount	 Below (<) \$ get 9 From (>=) \$ to (<) \$ Above (>=) \$ get 	9 get % %	
Include items	Setup		



New override subordinate commission setup				
Start date	Oct 🗸 - 2018			
Get override subordinate commission conditions	Dwn sales > 💙 \$ 0			
Commission override	Subordinate first Level/s 🛛 : (Have setup) 🦲 💶 🔨			
	Subordinate second Level/s : (Have setup)			
	Subordinate third Level/s : (Have setup) Setup Repeat the steps for the following level steps fo	els. The levels		
	Subordinate fifth Level/s : (Nil setup)	'Havo sotup'		
	Subordinate sixth Level/s : (Nil setup) setup	Have setup.		
	Subordinate seventh Level/s : (Nil setup)			
	Subordinate eighth Level/s : (Nil setup) Setup			
	Subordinate tenth Level/s : (Nil setup)			
Click <submit> to complete setting up subordinate commission rules.</submit>				
Override subordinate commission setup list				
Start date Get override s	ordinate commission conditions <u>Commission override</u>	Action		
Oct-2018	Own sales >\$0 Subordinate second Level/s View Edit	Copy Delete		
Subordinate third Level/s View				
	The new sub-ordinate experience of the device of the distance of the second sec			
HKB2B User experience system 11	The new subordinate commission rules can be viewed by clicking <view>.</view>	Print On : 30-Nov-2018		
Agent commission report		Prepared by : beauty Page : 1 of 1		
Organization : All Invoice date / Payment date : 1-Nov-2018 to 30-Nov-2018	Agent : Mary Ho Invoice shop : All Invoice no : All to All Member code : All to All			
Referred t Invoice Member Member member shop no Invoice date code name code	Non First teferred by 1st Non 1st treatment Treatment treatment Lumpsum nember Item Item purchase purchase purchase Remaining done Payment calculate Payme name Join date code Item name Quantity amount amount amount amount amount balance date amount amount no	nt Payment Agent Agent date % commission		
Mary Ho (MH) - MH				
CWB PSI- 19-Nov-2018 WeM- Ray Man 00168 00012	17-Sep-2013 ET01 Eye Treatment 1 \$1,000.00 \$0.00 \$1,000.00 \$1,000.00 1 \$1,000.00 \$1,000.00 A	,bar \$0.00		
	Subtotal : \$1,000.00 \$0.00 \$1,000.00 \$0.00 \$1,000.00 \$1,000.00 \$1,000.00 \$1,000.00 Lu	\$0.00		
	All period, all items amount (<u>\$1,000.00</u>) below (<	\$5,000.00, get 5% \$50.00		
Get override subordinate commission, own sales (\$1,000.00) > \$0.00				
Mary Ho is now able to get 1% commission for sales Subordinate Sandy Lam Scindy Ho sales (\$35,700.00), get \$357.00 (\$357				
generated by her 3 subordinates. Subordinates Subordinate				
Total commission for Mary Ho (MH) - MH : \$707.00				