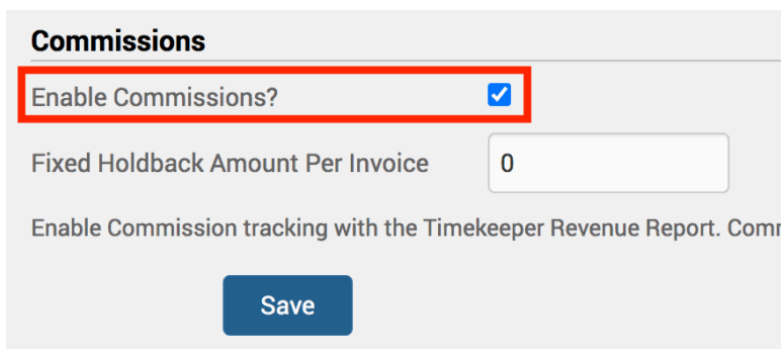


Tip of the Week: Commissions Structure and Revenue & Commissions Report

TimeSolv has three different levels for calculating commissions. These three levels are the working attorney, responsible attorney, the originating attorney. It's important our users understand where and when to enter the different commission amounts according to the firm's commission structure needs. This week's Tip of the Week takes a look at setting up commissions structure as well as running a Revenue & Commissions report.

First off, make sure you have commissions enabled. This is done under **Account>Settings>General**. Click on the '**Enable Commissions?**' checkbox at the bottom of the screen.



Commissions

Enable Commissions? ☒

Fixed Holdback Amount Per Invoice

Enable Commission tracking with the Timekeeper Revenue Report. Comr

Save

Working Attorney Commissions

Next up, to set up commissions for an individual user, head under **Account>Timekeepers** and click on the Timekeeper name. Under the **Profile** tab, there is an '**Edit Commission**' button. You can create a universal commission by selecting 'All' Clients and 'All' Matters so that any

Time entered by this user will earn an X amount of commission.
Alternatively, you can make it as specific as you need and select specific Clients and Matters.

The screenshot shows the 'Chilton, Brian' profile page in a software application. The page has tabs for Profile, Contact, Permissions, Matters, Hourly Cost, Abbreviations, and TimeSync. The 'Profile' tab is active, showing fields for First Name (Brian), Last Name (Chilton), Email (maleeha@timekeeper.com), Username (BChilton), Two Factor Security, SSN, Status (Active), Type (TimeKeeper), and Employment Status (Employee). A modal window titled 'Edit Commission' is open, displaying a form to edit commission settings. The form has dropdowns for Client (All) and Matter (All), a text input for Commission Percent (0), and a 'Create New' button. Below the form is a table with columns Client, Matter, and Commission Percent, showing one record: All, All, 20. The table has 'Edit' and 'Delete' buttons for each record. At the bottom of the modal, there is a 'Save' button. The background page also shows a 'Commission Manager' dropdown and a 'Commission Manager (%)' input field.

Client	Matter	Commission Percent
All	All	20

Responsible Attorney Commissions

These are set up under the Matter level. Click on **Clients>Clients & Matters>[Matter]>General** tab. There is a 'Responsible Timekeeper' field. Let's say you enter 15% for the Responsible Timekeeper; they will receive 15% of all the receivables on this Matter regardless of who entered Time for it. Note that the Working Attorney Commission will pick up the difference. So if the Responsible Timekeeper is also set up under Working Attorney Commissions, they will get both commission percentages against this Matter.

Matter Details

Matter Clone Demo - [Amber Little](#)

General

Originators

Contacts

Invoice Settings

Payment Settings

Team

Matter Plan

Budget

Name *

Matter

Matter Id

101 - 107

Responsible Timekeeper

Baines, Dianne

Commission Percent

20

Active?

☒

Originating Attorney Commissions

If you need to add additional users for commissions against all Time entered against a Matter, you can go ahead and click on the **Originators** tab to add additional users to the commission structure. Here you can add as many Originating Timekeepers as needed.

Matter Details

Matter Clone Demo - [Amber Little](#)

General

Originators

Contacts

Invoice Settings

Payment Settings

Team

Matter Plan

Budget

Invoices

Calendar

Documents

Relationships

Trust

Notes

Split Billing

Custom Fields

Originating Timekeeper *

-

Commission Percent

0

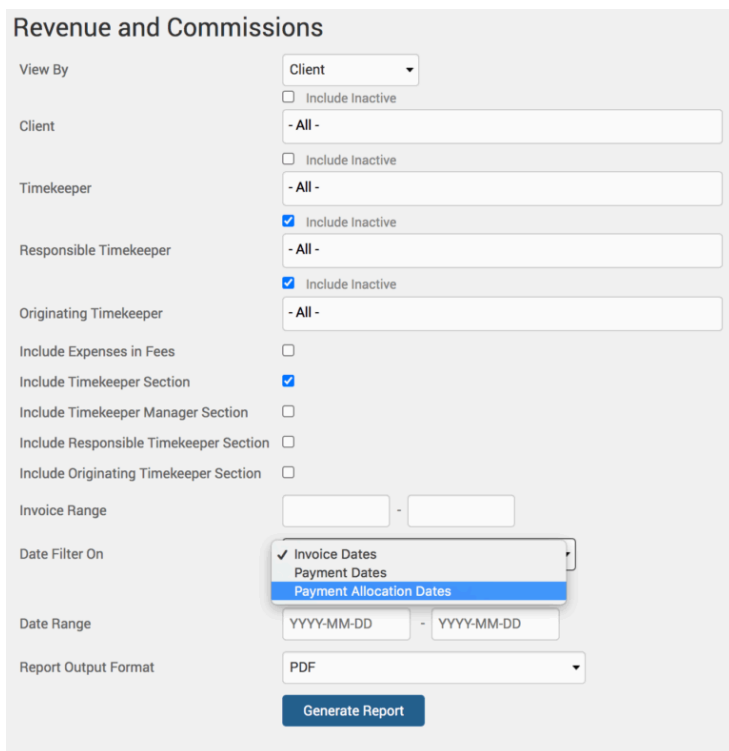
Save

or Cancel

Originating Timekeeper	Commission Percent	
Johnson, Tony	5	Edit Delete
Jackson, Alice	20	Edit Delete

Revenue & Commissions Report

Head under **Reports>Performance>Revenue and Commissions**. We offer full flexibility on our Revenue & Commissions report. you can run it for the Client or Matter, and even choose which specific user(s) to run it for, if not all. We recommend you run the report by 'Payment Allocation Dates' as the date filter, as this will be the most relevant selection for viewing commissions. We also recommend running it in PDF format.



The screenshot shows the 'Revenue and Commissions' report configuration page. It includes several sections for filtering and formatting the report:

- View By:** A dropdown menu set to 'Client'.
- Client:** A text input field with '- All -' selected.
- Timekeeper:** A text input field with '- All -' selected.
- Responsible Timekeeper:** A text input field with '- All -' selected.
- Originating Timekeeper:** A text input field with '- All -' selected.
- Include Inactive:** Checkboxes for 'Include Inactive' are present for Client, Timekeeper, Responsible Timekeeper, and Originating Timekeeper. The checkboxes for Timekeeper, Responsible Timekeeper, and Originating Timekeeper are checked.
- Include Expenses in Fees:** A checkbox that is unchecked.
- Include Timekeeper Section:** A checkbox that is checked.
- Include Timekeeper Manager Section:** A checkbox that is unchecked.
- Include Responsible Timekeeper Section:** A checkbox that is unchecked.
- Include Originating Timekeeper Section:** A checkbox that is unchecked.
- Invoice Range:** Two text input fields separated by a hyphen.
- Date Filter On:** A dropdown menu with three options: 'Invoice Dates' (checked), 'Payment Dates', and 'Payment Allocation Dates' (highlighted in blue).
- Date Range:** Two text input fields for 'YYYY-MM-DD' separated by a hyphen.
- Report Output Format:** A dropdown menu set to 'PDF'.
- Generate Report:** A blue button at the bottom.

If you'd like to contact TimeSolv support for help, please call 1.800.715.1284 or Contact support!

[Contact support](#)