Evenq

2026 edition

The Sales Administrator's Handbook

How to run commission between Sales and Finance, from clean sales data to a closed, paid and provable period.

Data · Plans · Rules and EQ · Money · Proof

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Chapter 1

The job between Sales and Finance

What a sales administrator does, who depends on the work, and how a closed deal becomes a line on a payslip.

- Plans and quotas
- Commissions
- Pay runs
- Audit trail



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Section 1.1

A Thursday in late January

At 16:40 on the last Thursday of January, the sales operations analyst at a mid-sized distributor of industrial pumps in Wrocław had three problems on her desk. Payroll needed the commission file by 18:00. A manager had just forwarded a rep's email saying his December payout was €1,900 short. And the CRM showed a €64,000 deal as closed-won on 30 December that the customer had cancelled on 3 January.



None of the three problems was difficult on its own. The file existed, more or less. The rep's complaint could be checked. The cancelled deal was a known kind of mess.

What made the afternoon hard was that each problem touched the other two. If the €64,000 deal stayed in the file, the rep who sold it would be paid on revenue the company would never collect. If it came out, his attainment for the quarter would drop below quota, and the accelerator he had been paid in December would no longer be justified. The €1,900 complaint came from a different rep on the same team plan, whose team component depended on the same quarterly total.

> **She sent the file at 17:52. On Monday she spent four hours proving it was right.**

The company is a composite of several real ones, and anyone who has done this work will recognise the afternoon. This book is about arranging things so that afternoons like that one become rare, and Monday mornings take twenty minutes instead of four hours.

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Section 1.2

What the job is called, and what it actually is

Sales administrator, sales operations analyst, revenue operations specialist, commission analyst. The title on the contract varies. The work underneath it does not.



Figure 1.2 The five areas of the role

In a company of forty salespeople the job is often one person. In a company of four hundred it can be a team of six split into sub-functions. In a company of twelve it is usually someone in finance who "also does the commissions", and who would be surprised to learn that the work has a name.

Whatever the title, a sales administrator keeps the commercial side of the business measurable and the people on it paid correctly.

That breaks down into five areas of responsibility. Not every role covers all five, and the weight between them shifts with the size of the company. A person who understands all five will understand why their own part of the work looks the way it does.

> **Every commission is a calculation on a record. A wrong record produces a wrong payment with complete arithmetical precision.**

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The five areas of the role

1. 

Sales data

Deals, customers, products, owners and dates live in a CRM, and the CRM is only as good as what people type into it. The administrator is usually the person who decides which fields are mandatory, who chases missing close dates, and who notices that a third of last quarter's deals have no product attached.

It sounds clerical. Everything else in this list rests on it.

2. 

Territories, accounts and quotas

Someone has to decide which rep owns which customers and how much each rep is expected to sell. Sales leadership usually makes those decisions. The administrator turns them into something measurable, which means account assignments with start and end dates, a quota per person per period, and a record of every change to either.

When a rep moves to key accounts in May, the administrator knows which open deals move with them.

3. 

Incentive compensation

This is the part most people mean when they talk about the job. A compensation plan describes how a salesperson earns variable pay. It sets out what counts, at what rate, against which target and with which exceptions.

The administrator configures the plan, calculates what it pays, explains the result, and fixes it when the plan meets a situation its authors did not imagine.

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The five areas of the role

4.

The period close

Every month, or every quarter, the numbers have to be frozen, checked, approved and handed over to payroll and to accounting. The close is a process with a calendar, a sequence of checks and a set of people who must sign something.

Done badly, it is a scramble. Done well, it is a routine that a new hire could run from a checklist.

5.

Controls, disputes and evidence

Salespeople challenge their pay. Auditors ask why a payment was made. A rep leaves and a lawyer asks what was owed on the day they left.

The administrator needs to answer all of these with documents rather than recollection. They need to show who changed which setting and when, what the calculation read, and who approved the result.

2/5

of this book is about compensation

It is where the money is and where most of the arguments are. The rest of the book gives you what you need to do that part well.



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Section 1.3

Where the role sits

Sales administration reports to different places in different companies. The reporting line changes how the job feels more than it changes what the job is.



Reporting to sales. The administrator is close to the people being paid, hears about problems early and understands why a deal was structured the way it was. The risk is pressure. A sales director who wants a rep to hit an accelerator at quarter end has an obvious interest in how a borderline deal is counted.

Reporting to finance. The incentives reverse. The administrator is trusted by the CFO and by auditors, and has no conflict about saying no. The risk is distance. The plan document gets applied with great accuracy to situations it never described, and the sales team stops believing that anyone understands how they work.

Reporting to revenue operations. A function that sits beside both is cleaner, but only if it has the authority to settle disagreements between them. Without that authority it becomes a third party that both sides lobby.

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> **The person who configures a calculation should not be the only person who approves its result.**

There is no correct reporting line, but there is a correct principle. In a small company the administrator calculates and the CFO approves. In a larger one, changes to a live plan need a second reviewer. Write it down, and keep it the same in December as in June.

Who you serve

Customer	What they want	What they usually get wrong
Salespeople	To know what they will earn before they earn it, and to trust the calculation	Reading the plan once, at signing, and never again
Managers	Their team's position against target, and a plan that steers behaviour	Promising exceptions in conversation that nobody records
Finance	A figure for the accrual, one for payroll, and a reason for every difference	Asking for one number when there are legitimately three
Payroll and HR	The right file, on the right day, for the right people	Paying a leaver's final commission under the wrong rules

The administrator has at least four internal customers, and they want different things from the same numbers.

The last column matters as much as the second. Most difficult moments in this job come from a reasonable person making a reasonable assumption that turns out to be wrong. A good administrator learns where those assumptions break, and puts the answer in front of people before they ask.

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Section 1.4

The money path from a closed deal to a payslip

The simplest way to understand the job is to follow one deal from the moment it closes to the moment the commission appears on a payslip. The details differ between companies. The stages almost never do.



1. Deal closed
2. Transaction
3. Plan applied
4. Payout
5. Review and approval
6. Payroll and accounting
7. Statement

Figure 1.3 The seven stages a deal passes through, typical of a European B2B company paying commission monthly on revenue. Each stage is a place where a wrong record becomes a wrong payment.

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1 The deal is closed

A rep in the Kraków office, whom we will call Marta, marks a deal as closed-won in the CRM on 14 March. It is a €42,000 order for replacement pumps and a two-year service contract.

The CRM record holds the customer, the amount, the close date, the owner and two line items.

Already there are questions. Is the amount before or after the discount Marta agreed on the phone? Does the service contract count as revenue for commission, or only the equipment? Is 14 March the date the customer signed, the date Marta clicked the button, or the date the purchase order arrived?

Each of these is answered somewhere, ideally in the plan document. If it is not answered there, it will be answered by whoever happens to be calculating that month, and it may be answered differently next month.

2 The deal becomes a transaction

The record leaves the CRM and enters whatever system calculates commission, whether that is a dedicated tool or a spreadsheet. It stops being a deal and becomes a transaction, a single line with an amount, a date, a payee and whatever attributes the plan needs to read.

This is the first place where data quality turns into money. With no owner, the deal cannot be paid to anyone. With the wrong owner, it is paid to the wrong person. If it arrives twice, because someone edited it after the first sync, it may be paid twice.

No owner
paid to nobody

Wrong owner
paid to the wrong person

Twice
paid twice

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3 The plan is applied

Marta's plan pays 4% on revenue up to her quarterly quota of €250,000 and 7% above it. She has already sold €230,000 this quarter, so the €42,000 deal crosses her quota and is split at the boundary.

Worked example · Marta's €42,000 deal

Slice	Revenue	Rate	Commission
Up to quota (€230,000 to €250,000)	€20,000	4%	€800.00
Above quota (€250,000 to €272,000)	€22,000	7%	€1,540.00
Total	**€42,000**		**€2,340.00**

€2,340
Marta's commission on this deal

A different plan might apply 7% to the whole deal because it was the deal that crossed the line, or 4% to all of it because she was below quota when it started. Neither is wrong as a design. What is wrong is not knowing which one your plan does. Chapter 6 covers the three common ways of handling a deal that crosses a threshold, and the behaviour each one encourages.

The result of this stage is usually called a credit. It records that this transaction earned this person this amount under this rule.

A careful system keeps the credit together with the inputs it used, so the figure of €2,340 can still be explained in November, long after Marta's quarter has closed and her quota has been replaced by next year's.

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4 Credits become a payout

Marta's €2,340 is one credit among the dozens she earns in a month. At the end of the month they are gathered into a payout, which shows what she is owed for March and every line that makes it up.

This is also where adjustments arrive. If a deal she was paid on in January has been cancelled, and the plan allows it, a deduction may appear here. If she won a dispute about February, the correction may appear here too.

A payout that contains only the month's new credits is the easy case. The hard cases carry consequences from earlier periods, and they are where most payroll errors start.

5 Review and approval

Someone other than the person who calculated the payout looks at it and agrees that it is right.

Often that means a manager checking that the total looks plausible, which catches large mistakes and almost no small ones. A better review asks specific questions.

- **Did anyone's payout change by more than 30% against last month?**
- **Are there payouts for people who left?**
- **Did any transaction produce no commission, and do we know why?**

The last question is the most useful and the most often skipped. A transaction that paid nothing appears on nobody's payout, so nobody complains until the rep notices. List those transactions every month and close each one with a reason.

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6 Payroll and accounting

Payroll pays the approved figures with the next salary. Accounting records the same figures as an expense. The two rarely agree on timing, and they are not supposed to.

Under IFRS 15, commissions that are incremental costs of obtaining a contract are generally capitalised and amortised over the life of the contract, unless that life is a year or less.

24 months over which Marta's commission on a two-year service contract may be expensed, though it is paid in April

Labour law adds its own rules. In *Lock v British Gas* (C-539/12, 2014) the Court of Justice held that EU holiday pay must reflect the commission a worker would normally have earned. The administrator is often the only person who can produce the commission history that calculation needs.

7 The statement

At its worst, a statement is a single number on a payslip. At its best it lists every deal, every rate and every adjustment, so Marta can check the number herself.

The quality of this stage decides how much of next month goes on answering questions. Reps who can see the calculation ask fewer questions, and specific ones. They say "line 14 used the wrong rate" instead of "my pay seems low". Specific questions take minutes. Vague ones take hours.

Inside Evenq

Every commission stores the calculation it came from, with the rule as it read then, the rate table, the attainment used and any modifiers. A sale that produced nothing appears in the Reconciliation Centre with its reason. The question "why €2,340?" can be answered in November without rebuilding March.

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Section 1.5

The monthly calendar

The money path describes one deal. The calendar describes the month, when all the deals move along that path at once. This one assumes payroll needs final figures around the 20th.



Month end	**Data cut-off.** Deals closed after this moment belong to next month.
Day 1–2	**Data checks** for missing owners, missing products, duplicates and dates outside the period.
Day 3	**Calculation.** Draft credits and draft payouts.
Day 4–5	**Exceptions.** Large movements, zero payouts and transactions that paid nothing, each with an owner.
Day 6–8	**Manager review** and corrections. Payouts approved.
Day 9	**Finance sign-off.** Pay run approved, accrual figures agreed.
Day 10	**Payroll file** and accounting export delivered.
After payment	**Statements published.** The dispute window opens.

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10 working days from the cut-off to the payroll file

Two features of this calendar deserve attention.

Checks come before the calculation

It is tempting to run the numbers first and look for problems in the result. That works for problems that make a number look strange. It does not work for problems that make a number disappear, such as a deal with no owner, which never reaches the result at all.

The close ends with a dispute window

Salespeople will find errors the review missed. A process that expects that, records each challenge, answers it in writing and pushes any correction through the next period is far easier to defend than one that treats every challenge as an interruption.

Inside Evenq

A close you can see

The period close checklist reads each step from the same data as the screens where the work is done. It shows how many of the period's sales are processed, whether disputes are resolved, whether the Reconciliation Centre is at zero, and whether the pay run is approved and paid.

Each item still open is a link to the place where it gets fixed. A period does not read as closed while commission for it is still owed.

See it on evenq.eu →

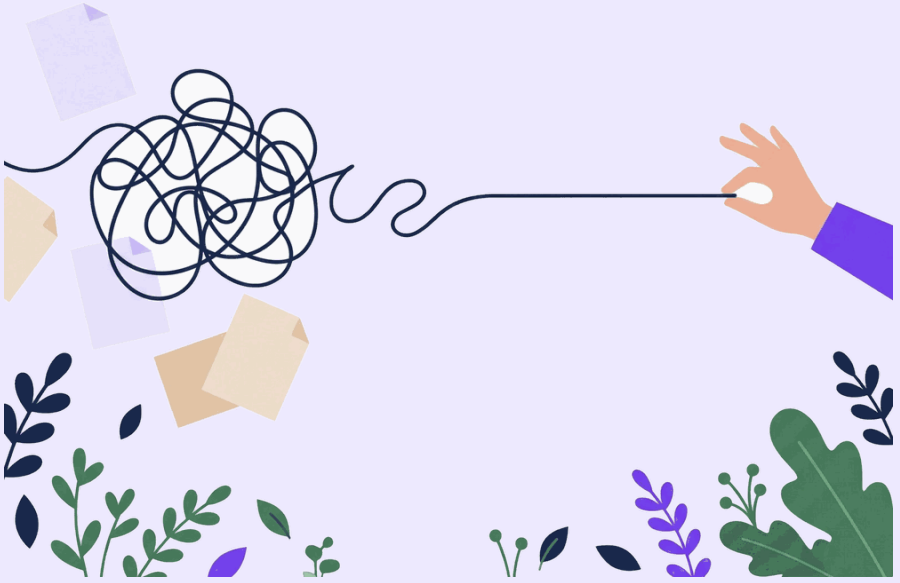


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Section 1.6

What goes wrong

After a few months in the role, most administrators can list the problems that cost them the most time. The lists are remarkably similar between companies, and they fall into four groups.



01 The data is wrong

The CRM says the deal closed on 31 March. The customer signed on 2 April, and the rep moved the date because the quarter's accelerator depended on it. Or, more innocently, an assistant entered the deal under the wrong owner. Or the amount includes VAT in one region and not in another.

Data problems are the most common and the least interesting. The cure is mostly preventive, with mandatory fields, clear definitions and a monthly check. Chapter 3 is about building that check.

02 The timing is wrong

A deal is paid in March and cancelled in May. A rep leaves in June with three deals invoiced in August. A quota changes mid-quarter. Timing problems involve two dates, and the plan has to say which one governs. It rarely does. Chapters 9 and 10 cover clawbacks, leavers and mid-period changes.

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03 The plan is ambiguous

A plan says "accelerated rate above quota" without saying whether the higher rate applies to the excess or to everything. It says "new business" without saying whether an existing customer buying a different product counts. It says "net revenue", and sales reads it as revenue after discount while finance reads it as revenue after discount, rebates and freight.

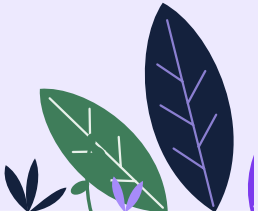
Ambiguity stays invisible until the first time it matters. The best moment to find it is before the plan launches. Chapter 5 has a set of unusual test deals that a plan should be able to price without anyone deciding on the day.

04 The trust is gone

This one is a consequence rather than a cause. When salespeople cannot see how their pay is calculated, when corrections arrive without explanation, when a challenge takes three weeks to answer, they stop trusting the numbers. Every payout becomes a negotiation. Reps keep their own spreadsheets, and the administrator spends half of each month defending figures that were right.

Trust is rebuilt slowly, mainly by making the calculation visible.

> **People will accept a lower rate they understand before they accept a higher one they cannot check.**



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Section 1.7

Four rules worth adopting on the first day

Most of this book is about technique. Some principles, though, run through every chapter, and a new administrator can adopt them before learning any of the technique. Here are four.



1.

Every number has a reason, stored with it

If you cannot say why someone was paid a figure without recalculating it, you do not really know why. Keep the inputs with the output, meaning the rate, the rule, the target and the date. A figure nobody can explain six months later is unverified.

2.

Correct by reversal, not by editing

When a sale was recorded wrongly, cancel it with a reason and record the correct one. When a payment was wrong, record a correction against the person's balance and settle it later. Editing destroys the history you will need when someone asks what happened.

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3.

Write the decision down before you need it

Every unusual case you resolve becomes a precedent whether you intend it or not. If you decided in March that a rep who changes territory keeps commission on deals already in negotiation, the next one will expect the same. Keep a short log with the date, the case and the reasoning. After a year it is the most useful document you own.

4.

Separate who configures from who approves

The person who sets up a plan or a rule should not be the only person who confirms the money it produces. This protects the company, and it also protects the administrator, who will otherwise be the obvious suspect whenever a number turns out to be wrong.

Inside Evenq

The four rules are built in

1. Every commission stores the rule, rate and attainment it was calculated with.
2. A wrong sale is voided with a reason and registered again. A paid commission is never rewritten, and a clawback writes a debt collected from later pay runs.
3. Closing a case in the Reconciliation Centre records who closed it, when and why, so the decision is written down.
4. A plan's rules lock when it is activated. Changing it means a new version, and the original stays exactly as it paid.

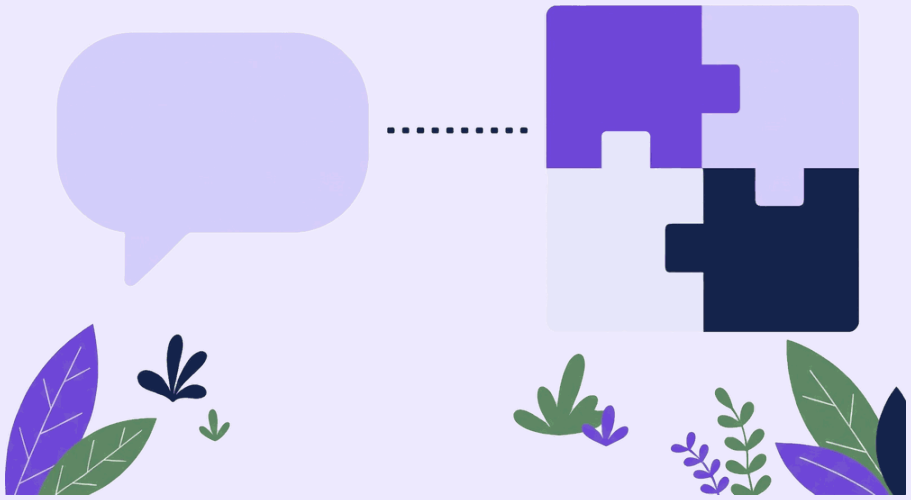
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Section 1.8

A first look at conditions

The administrator's most frequent technical task is translating a sentence from a sales director into a rule a system can apply.



Most commission tools give you a list of conditions, each made of a field, an operator and a value. That works for "region equals Silesia". It struggles with "within 30 days of the invoice", which compares two dates on one sale, and with "weekend", because no field says what day of the week it was.

Evenq handles these cases with EQ, a small formula language for rule conditions. A formula must come out true or false, and the rule pays only when it is true.

"2% extra if the customer pays within 30 days of the invoice"

```
DAYS_BETWEEN(sale.invoicedate,
sale.paymentdate) ⩽ 30
```

"Only sales in the Silesia region"

```
sale.region = "Silesia"
```

"Weekend sales get the promotional rate"

```
IN(WEEKDAY(sale.date), [6, 7])
```

Figure 1.5 WEEKDAY counts the ISO way, so 6 and 7 are Saturday and Sunday. The two dates are your own sale fields.

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Two properties that matter more than syntax

1. The same sale always gives the same result

No EQ function reads today's date, so recalculating March in November produces March's answer. A condition that could give a different answer on a different day would break the first rule of the job, because the reason stored with the number would no longer explain it.

2. A missing value is never zero

If a sale has no payment date, the formula does not quietly decide the customer paid on time. It produces no result, the rule does not pay, and the calculation records which value was missing so someone can complete it. Treating missing data as zero produces a confident figure from nothing.

> **A calculation you cannot explain six months later is a calculation you cannot defend.**

Chapter 7 covers conditions in full, with the complete EQ reference, lookup tables, fiscal periods and testing a formula on your last 200 real sales.



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Inside Evenq

Zeke turns a sentence into a rule you can check

Pay 5% only on weekend sales.”

What a sales director asks for
typed into the rule screen, in plain words

→ `IN(WEEKDAY(sale.date), [6, 7])`

The draft passes the same check as a formula you typed. Nothing is saved until you save it.

200

latest real sales the engine runs the draft against, **before it pays anyone**

Evenq features used

EQ formulas, Zeke, rule preview with real sales

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Section 1.9

How this book is organised

The book follows the order in which a new administrator usually meets the work, rather than the order of a textbook. The general discussion does not depend on Evenq, and a reader using any other tool, or a spreadsheet, can apply all of it.



I **The function**
Scope, customers, calendar, and the data everything depends on

II **Design**
Territories, quotas and compensation plans, with worked examples

III **Calculation**
Rates, tiers, accelerators, conditions, splits, currencies and caps

IV **The close**
Payroll and accounting, clawbacks, leavers and disputes

V **Controls**
Audit trails, approvals, and the questions an auditor or a lawyer will ask

Where the book describes how Evenq handles a problem, it is marked **Inside Evenq** and kept separate from the general discussion.

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Tasks for your first thirty days

For new administrators, and as a check for experienced ones

1

Find every compensation plan in force. Read each one in full and list every term it uses without defining it.

2

Pick one salesperson and one month. Follow three deals from the CRM to the payslip, noting every system and person they pass through.

3

Ask payroll for the exact date and format of the commission file, and what happened the last time it was late.

4

Ask finance how commission is accrued, whether any of it is capitalised, and who decides.

5

Find out who can change a live plan and who approves the result. If it is the same person, write that down as your first risk.

6

Start a decision log. The first entry can be the date you started it.



See the examples in this chapter running in Evenq

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