











## Commission Tracker2 SETUP for Sparenisleuker.nl (The SERCIVE TAB)

[Subscriptions](#)  
[FinanceCube](#)  
[Library](#)  
[Market Model](#)  
[CRM](#)  
**[Commission Tracker 2](#)**  
[Standard Import](#)  
[Fact Find](#)  
[Compliance Check List](#)  
[AutoAdvice](#)  
[Block Trade](#)

 [Payments](#)  [Reports](#)  [Recon.](#)  [Status](#)  [Sales](#)  [Set Up](#)

 [New](#)  [Change](#)  [Copy](#)  [List](#)  [Levels](#)  [Privileges](#)  [Reports](#)




**GIVE NAMES TO YOUR LEVEL(S): (if you have levels): (example)**

### ① Name Levels

Level	Text
1	<input type="text" value="Company"/>
2	<input type="text" value="Partner/Broker"/>
3	<input type="text" value="Agent"/>
4	<input type="text" value="Advisor"/>

**Remember to SAVE your level setup**

**Section ONE:**

 New
  Change
  Copy

### ① General Information

Network ID:

Provider:

CompanyID:

Adviser ID:

Description:

Date:

No. Of Payments:  No. Of Days:

If your network are not divided into companies, you might use the Company Setup under the TAB personal:

- [Level Text Setup](#)
- [PDF Setup](#)
- [Report Setup](#)
- [Category Setup](#)
- [Company Setup](#)
- [Instrument Setup](#)
- [Chain Setup](#)

Chose the company you want to setup commissions for, or keep All if all companies within your network are the same commission level.

Chose the advisor you want to setup commissions for, or keep All if all advisors within your network are the same commission level.

The field Description is for your own note/information.

The Date is when you want the comm. Track to start the calculations. (The VERY first time)

No. Of Payments are per year. (i. e. if you want every second week, this will be 26)

No. of Days: Days after calculation, to be paid.

## Section TWO:

### ② Select instrument(s)

Select Instruments     
  
  All  My Instrument List

Select the instrument(s) you want to setup commissions for. (mind to choose from either Global instruments or My instrument list)

You might choose a group of instruments by finding a similar word in the name.

Here are an example: (choose skagen as similar word) You have to click on each instrument from the list, and then tick to have the green "v" to make a group).

### ② Select instrument(s)

ISIN: SKAGEN Global UL     
  
  All  My Instrument List

-	Name	InstrumentID	Text
<input checked="" type="checkbox"/>	SKAGEN ASA SKAGEN AVKASTNING	NO0008000452	
<input checked="" type="checkbox"/>	SKAGEN Global UL	ULNO993053	

## Section THREE:

### ③ Insert Commission Rates

Type

Transaction	Amount	%	Amount Step 1
Company (Level 1)	<input type="text" value="0.0000"/>	<input type="text"/>	<input type="button" value="+"/>
Partner/Broker (Level 2)	<input type="text" value="0.0000"/>	<input type="text"/>	
Agent (Level 3)	<input type="text" value="0.0000"/>	<input type="text"/>	
Advisor (Level 4)	<input type="text" value="0.0000"/>	<input type="text"/>	<input type="text"/>

Type: Choose between:

Select Type   
Select Type  
Transaction  
Brokerage  
Cost  
Market Value

Then setup your % for this instrument(s) on the level you have setup.

If you want more than one Amount, click on the +-button, and another level will appear.

The levels are UP TILL the Amount you enroll.

On the upper last level, you do not have to enroll an amount, only %.

**Remember to SAVE your settings**

**GOOD LUCK, and give me a call for further help.**