

Automated Commission Tracking for Complex Payouts

The Challenge

The client needed a simpler way to calculate and track commissions for different fund types, with varying commission rates and payout schedules. Payments had to be disbursed incrementally over 36 months, which previously involved manually tallying data each month using Excel and pulling information from multiple systems—resulting in a time-consuming and error-prone process.

The Solution

We built an automated system in HubSpot to handle the client's commission calculations. We made commission tracking automatic for each fund type and scheduled incremental payouts over 36 months. This upgrade replaced their old Excel process and pulled all commission data into one easy, centralized view.

The Details

Industry:
Investment Banking

Business Area:
Sales & Finance

Tools Used:

- Calculated Properties
- Custom Reports

```
if(( Fund Type == "Income/Fixed"), (( Amount in company currency * 0.0075) / 36), 0) NUMBER
```

```
if(( Fund Type == "Equity"), (( Amount in company currency * 0.0125) / 36), 0) NUMBER
```

The Impact

The client can now:

- Automatically calculate commissions based on fund type, eliminating manual work
- Track monthly payouts over 36 months in a single system
- View up-to-date commission totals for each deal at a glance
- Get accurate commission payments with reduced risk of human error

