

20-30 HOURS SAVED QUARTERLY —

Automating Vendor Commission Reporting in HubSpot

The Challenge

Tracking vendor commissions for specific services was a tedious, manual process for the client, causing:

- Excessive time spent reviewing closed deals and identifying commissioned services
- Frequent calculation errors, leading to inaccurate commission payouts
- Delays in quarterly vendor payments due to disorganized data

The Solution

We built an automated reporting system within HubSpot that allows the client to tag specific services and generate commission reports effortlessly. This solution ensures that all relevant data is captured and calculated accurately, reducing manual effort and errors.

The Impact

The client can now:

- Automatically track and report commissioned services without manual calculations
- Save over 20 hours per quarter that were previously spent reviewing deals
- Virtually eliminate errors in commission payouts, ensuring vendors are paid accurately and on time

The Details

Industry:

Security

Business Area:

Finance

Tools Used:

- Custom Properties
- Custom Report Builder



“The Commissions Report saved my Director of Special Events 20-30 hours a quarter and reduced our error rate on commissions paid out to virtually zero.”

Product information

Name *
Special Event PD

SKU
SEG03

Description
Off Duty Officer or equivalent

Product Type
Service

Image Url
[Select image](#)

URL

Folder
No folder

Commissioned
Yes

Configure Filters (3)

Include data if it matches
ALL of the filters below

1 Deals
Deal stage is any of Quote Sent (Special Event Pipeline) or Closed won (Special Event Pipeline)

and

2 Line items
Commissioned is any of Yes

and

3 Deals
Event Date is between 01/01/2024 and 03/31/2024

[Drag fields here](#)

Undo Redo Refresh as I make changes Sort by - Export

EVENT DATE - MONTHLY	SUM (NET PRICE)	DEAL NAME	AMOUNT
Jan 2024	\$330.00		430
Jan 2024	\$3,030.00		4,080
Jan 2024	\$39,145.00		42,145
Jan 2024	\$5,200.00		5,630
Jan 2024	\$3,030.00		3,880
Feb 2024	\$10,350.00		11,430
Feb 2024	\$385.00		485
Feb 2024	\$600.00		640
Feb 2024	\$2,430.00		2,840
Feb 2024	\$14,750.00		16,740
Report Total	\$132,812.50		

