



Commission Setup Document

Commission App

Commission APP refers to how effectively Commission Structure can be defined within an organization. In other words, Commission APP is a tool to define a robust Commission Slab for salespersons / advisors.

It helps an organization to keep track of the revenue being generated by salesperson / advisor and the commission earned.

Commission APP can be controlled along with different parameters:

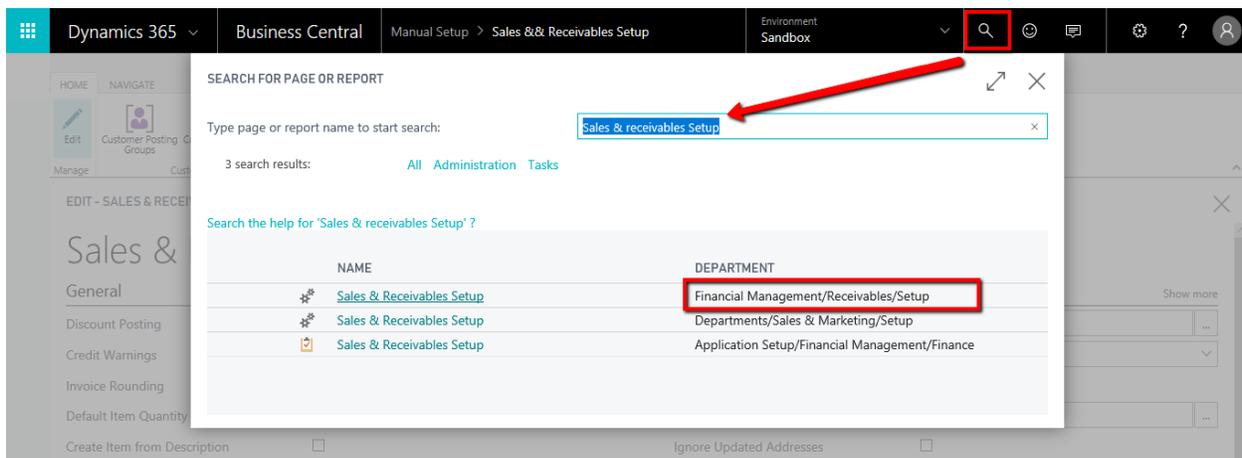
1. Date Range
2. Based on Order Value

Once Commission App is installed in the system follow the below Navigation:

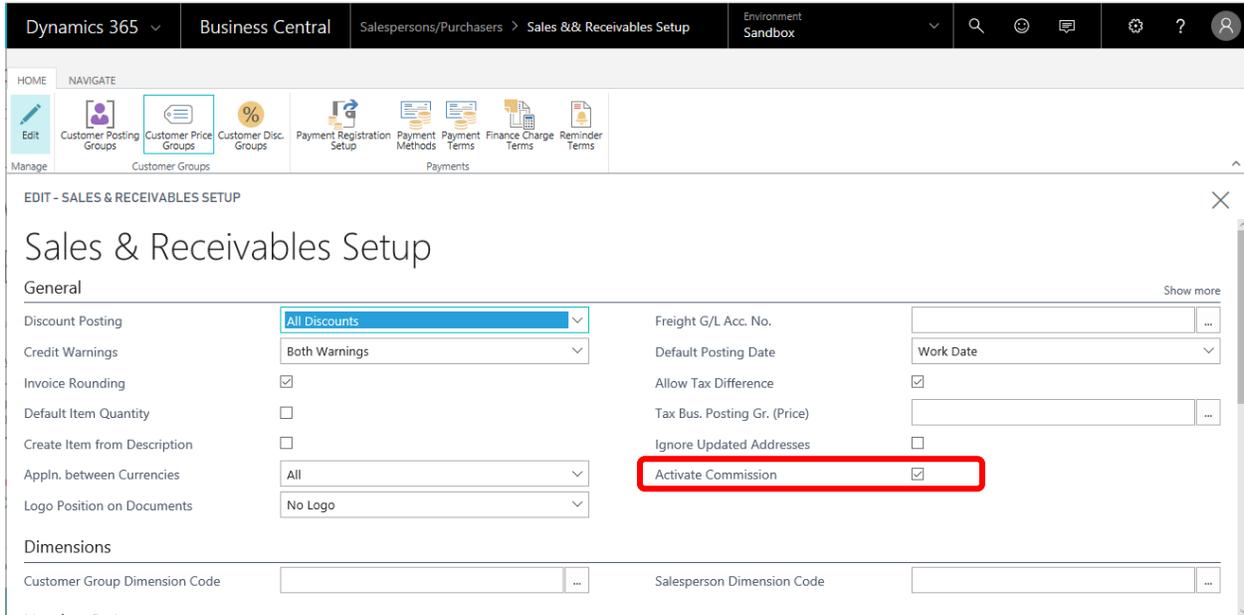
Step1:

Search for “Sales & Receivables setup”

- You can open Sales and Receivable setup page either by Searching “Sales & Receivables” in the search as shown in the Image-1 below.



- Click on the “Sales & Receivables setup” link under Name Column and following screen will open as shown in image below.

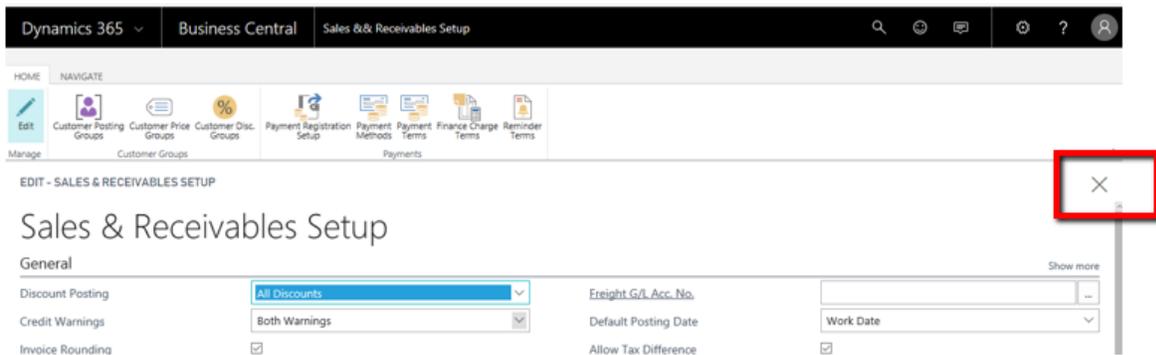


Check “Activate Commission” Boolean option, as highlighted in image above, to activate this Commission app feature.

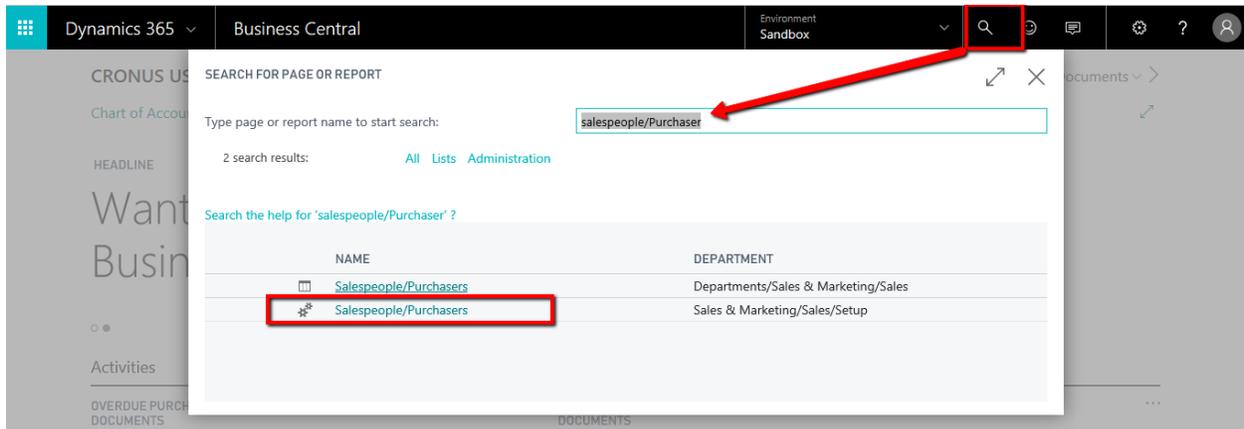
NOTE: In case extension is not successfully installed in your instance than you’ll not be able to see the mentioned field ‘Activate Commission Setup’. Please contact your administrator to install the extension successfully

Step2:

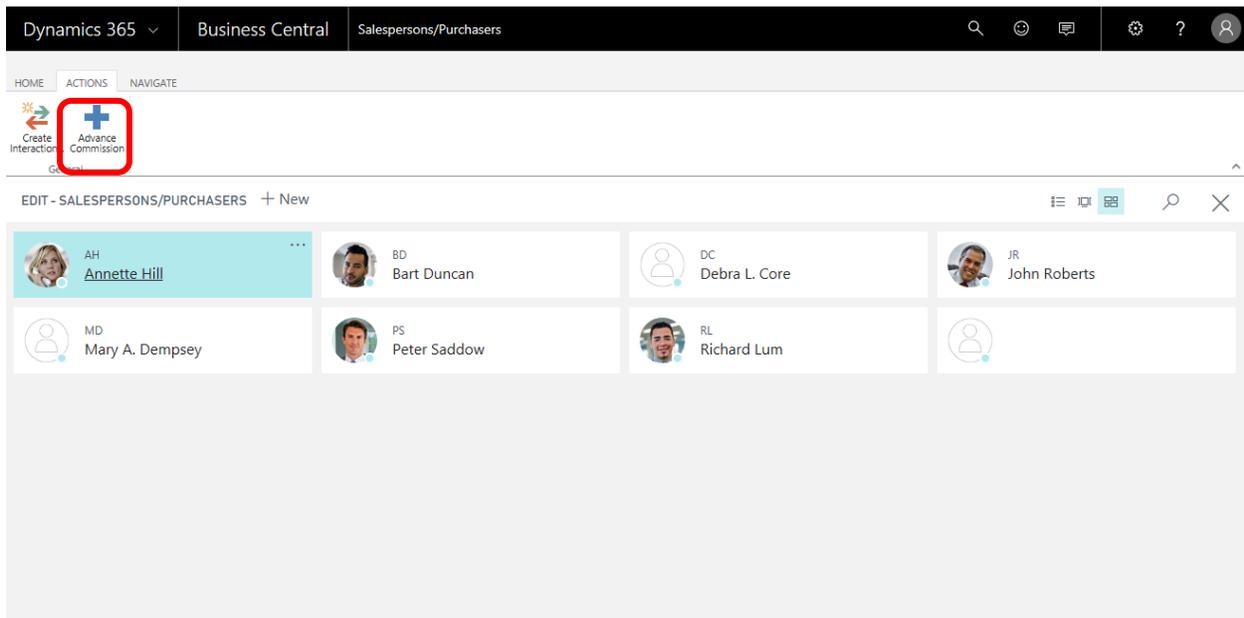
Close the Sales & Receivable Setup screen from X button. Refer image below.



Now search for Salespeople/Purchaser in Business Central Search, and click Salespeople/Purchaser line under Name Column as highlighted in the image



Go to “Actions” Tab you will see an action “Advance Commission” as shown below:

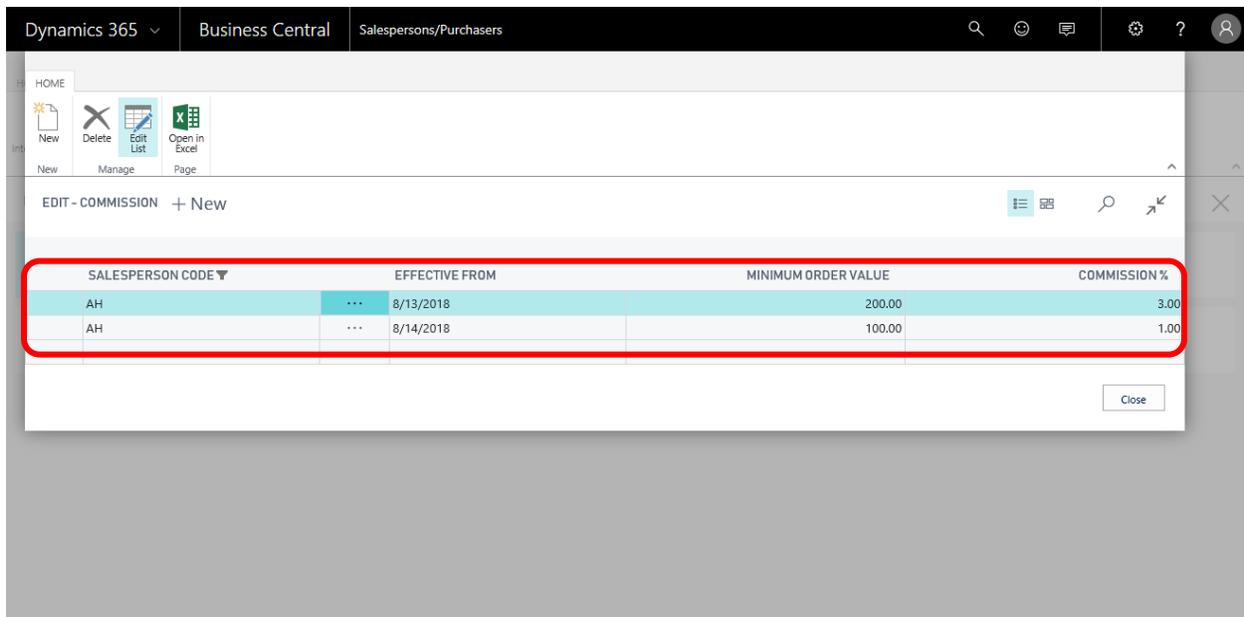


Step3:

Once you open up “Advance Commission” page, you can define various parameters of commission for related salesperson as below:

- **Effective From:**

- This is a date from which you wish to activate the commission to be calculated for a salesperson
- **Minimum Order value:**
 - This is the minimum invoice value below which commission is not applicable to salesperson
 - i.e. Commission will be calculated for a salesperson if Invoice amount for any single invoice is greater or equals the amount defined here.
- **Commission %:**
 - This field depicts the commission % for salesperson



The screenshot shows the Dynamics 365 Business Central interface for Salespersons/Purchasers. A table is displayed with the following data:

SALESPERSON CODE	EFFECTIVE FROM	MINIMUM ORDER VALUE	COMMISSION %
AH	8/13/2018	200.00	3.00
AH	8/14/2018	100.00	1.00

For Example:

- Salesperson code as AH starting 08/13/18 he is entitled for 3% commission for order value ranging between \$200 and > \$200.
- For any order with total value less than \$ 200 he is entitled for a 1% commission.
- Commission% can be increased / decreased based on date range

Step 4: Once a sales invoice gets posted, respective customer ledger entry would be generated with the commission% as seen in below screenshot:

Dynamics 365 Business Central Salespersons/Purchasers Customer Ledger Entries

HOME ACTIONS NAVIGATE

Manage Process Page

VIEW - CUSTOMER LEDGER ENTRIES

POSTING DATE	EX... TO PAYM FILE	ELECTRO... DOCUMENT STATUS	FISCAL INVOICE NUMBER PAC	ERROR CODE	ERROR DESCRIPTION	COMMISSION %
8/14/2018						1.00
8/13/2018						3.00

Customer Ledger Entry Details

Document Invoice PS-INV103234

Due Date 9/13/2018

Pmt. Discount Date 8/21/2018

Reminder/Fin. Char... 0

Applied Entries 0

Detailed Ledger Ent... 1

Incoming Document Files

NAME	TYPE
(There is nothing to show in this view)	

Step 5: You can view Advance Commission Report searching the report “Salesperson Advance commissions”. This report depicts commission earned per Salesperson / per Invoice & commission Amount

Dynamics 365 Business Central

SEARCH FOR PAGE OR REPORT

Type page or report name to start search:

1 search results: [All Reports and Analysis](#)

Search the help for 'advance comm'?

NAME	DEPARTMENT
Salesperson Advance Commissions	Departments/CommisionApp

Dynamics 365 Business Central

EDIT - SALESPERSON ADVANCE COMMISSIONS

Saved Settings

Name: Last used options and filters

Options

New Page per Salesperson:

Commission

Show results:

Where: SalesPerson Code IS: AH

And: Date Filter IS:

Buttons: Send to... Print Preview Cancel

Dynamics 365 Business Central Salespersons/Purchasers > Customer Ledger Entries

Tuesday, August 14, 2018 1:06 PM
1
SUDARSHAN KHANDAL

Code: AH
SalesPer

Posting Date	Invoice Number	Customer	Sales Amount	Profit	Sales Commission	Profit Commission	Commission Rate
AH Annette Hill							
8/13/2018	PS-40000	40000	380.20	84.00	11.41	2.52	3
8/14/2018	PS-40000	40000	150.00	1.90	1.50	0.02	1
AH Salesperson Total:			23,400.00	5,050.20	12.01	2.54	
Report Total			23,400.00	5,050.20	12.01	2.54	

Navigation: < 1/1 > [Icons]