



# Setup Guide

## TABLE OF CONTENTS

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<b>TABLE OF CONTENTS .....</b>	<b>2</b>
<b>INTRODUCTION .....</b>	<b>3</b>
<b>COMMISSIONS SETUP .....</b>	<b>4</b>
General Tab.....	4
Default Tab.....	6
Margin Levels Fast Tab .....	7
<b>COMMISSION LEVEL SETUP .....</b>	<b>8</b>
Level I – Specific Commission Setup .....	8
Level II –Entity Commission Setup .....	10
Level III – Commission Groups .....	11
Level IV – Margin .....	12
Level V – Salesperson .....	13
<b>USER SETUP TABLE AND SECURITY.....</b>	<b>14</b>
Commission Security Permissions.....	14
User Setup.....	15
<b>CUSTOMER CARD.....</b>	<b>16</b>
<b>SHIP-TO CARD .....</b>	<b>17</b>
<b>SETUP PROCEDURES AND TIPS.....</b>	<b>18</b>
Commissions Management Setup Wizard .....	18
Suggested Setup Process .....	21
<b>CONCLUSION.....</b>	<b>22</b>

## **INTRODUCTION**

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Installing Commission Management System (CMS) consists of running reports, and tweaking setup and commission percentage fields to work for you. Setup is in three main areas:

- Commissions Setup Form
- Salesperson Commissions Card

Customer Card, Ship-to Address Card, Item Card, and Salesperson Commissions Card.

In this section we will discuss the above areas and their related setup requirements. At the end of the manual we will step you through the recommended installation procedures for CMS. Even though your consultant will either perform or assist you in performing all installation and setup functions, we feel it is important that you have a good understanding of what the installation procedure entails.

Let's begin by discussing the various areas that have setup options.

## COMMISSIONS SETUP

**Helpful tip:**

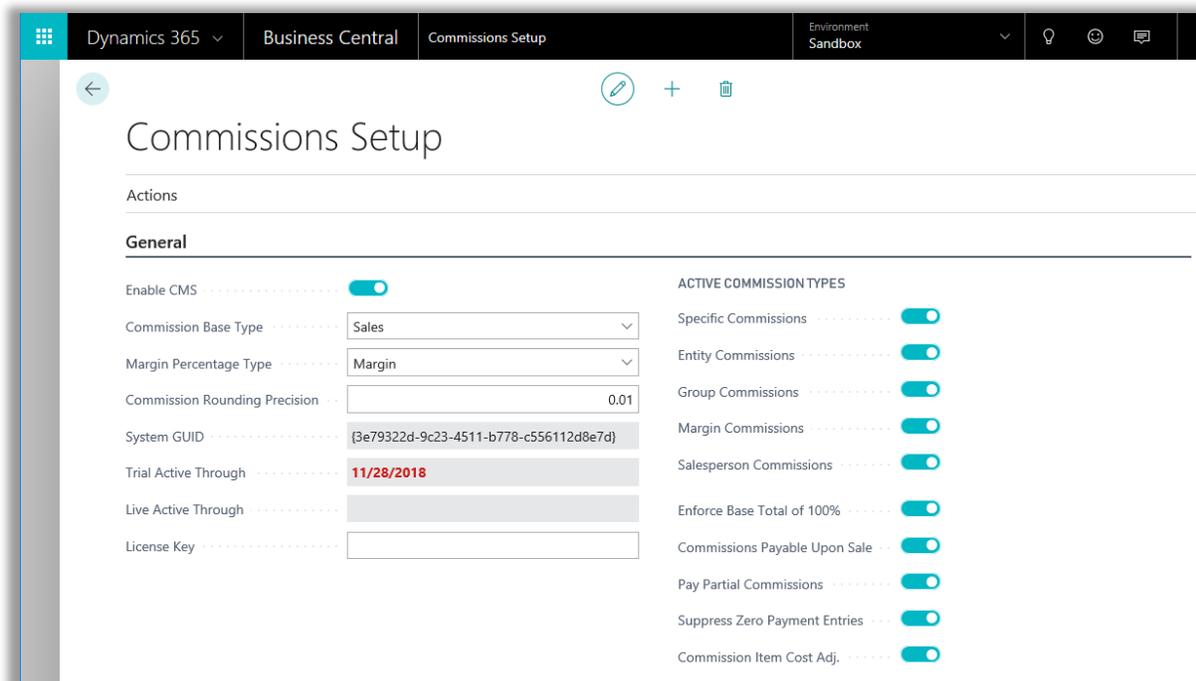
Go to Setup Procedures and Tips for assistance using the Commissions Management Assisted Setup Wizard.

Commissions setup can be found by searching for and Clicking on Commissions Setup will open the Commissions Setup form. From here you may manage the main components of the system. You will see three Fast Tabs on the form. We will work through each Fast Tab below.



## GENERAL TAB

On the General Fast Tab, you will find settings that determine how CMS will function. Let's review these options:



**Enable CMS** – turns on or turns off commissions for the entire company. Sites with multiple companies have utilized this feature when they pay commissions for sales in one company but not in others.

**Commission Base Type** – CMS allows you to choose whether commissions should be based on Profit or Sales. If you choose Sales, all commissions will be based upon the sale amount of each line. If Profit is chosen commissions will be calculated using the profit generated from each sales line.

**Margin % Type** – You have two options for defining profit – Margin or Profit. This feature was designed to flex with your definition of profit. Some companies think of their profit margin percentage as a percentage of cost and others think of it as a percentage of the selling price. Have it your way! Selecting Margin for this field, the profit percentage will be calculated by dividing the actual profit by the actual cost of the line item. If you select Profit for this field, then the calculation will be the actual profit divided by the actual price.

**Specific, Entity, and Margin Commissions** – As you know, CMS uses a four-tiered approach to each commission calculation. Check box fields are provided for enabling these various levels of commission calculations. If any of these options is unchecked, CMS will not calculate commission at that particular level. For example, if you have entered a commission percentage on an item card (Level II – Entity), but do not have the Entity Commission field checked, Commission Management will not calculate a commission using the Entity rate. Instead, it will skip the Entity level and move on to the next enabled level.

**Enforce Base Total of 100%** - If this field is unchecked, CMS will allow you to split commissions so the sum of the base percentages does not equal 100%. For example, this option may be helpful if you pay commissions to an employee for a finder's fee. Two salespeople may split commissions from a particular sale 50/50, but you also want to pay a finder's fee of 2% to another salesperson. This would require three people to be entered in the Salesperson Base % table with the total Base % adding up to 102%. By having the Enforce Base Total of 100% unchecked, you will be able to post this document.

If the Enforce Base Total of 100% is checked, CMS will prevent posting of the above example because the sum of the Base percentages does not equal 100. CMS will do a check on the Salesperson Base % totals upon either attempting to post the document, or upon entering the Document Line Commissions screen. At which point if the percentages do not equal 100 (could be less than or greater than 100), the user will be notified with an error message.

**User Note:**  
Be aware that when you allow commissions to sum to other than 100%, accurate sales or profit information cannot be obtained from the Commission Ledger. For example, if we allocated commissions as shown in this screen shot, total sales in the Commission Ledger would be 102% of the true total.

SALESPERSON CODE	EFFECTIVE DATE	ENDING DATE	BASE PERCENTAGE	SALESPERSON NAME
AH			50.00	Annette Hill
PS			50.00	Peter Saddow

**Commissions Payable Upon Sale** – If checked, this option directs CMS to make Commission Ledger Entries payable to the salesperson at the time the Sales Document is posted. Payment entries will not be created as payments are applied to the Invoices. If unchecked, Commission Ledger Payment Entries will be generated upon applying customer payments. Payment discounts offered and taken by the customer have no effect on commission calculations, regardless of the setup options selected.

**Pay Partial Commissions** – This option controls when CMS generates Commission Due amounts for your sales staff. In other words, you have the option to pay your sales staff on partial payments (customer payments that pay only a portion of a sales invoice amount) or on full payments.

CMS generates a Commission Payment Ledger line for all posted cash receipts. If you check the Pay Partial Commissions option, the payment entries will reflect a Commission Due amount based upon the percentage of the invoice the customer's payment addresses.

If this option is unchecked, CMS will still generate payment entries for each payment received; however, the Commission Due amount will be zero until the final payment is applied to the open invoice. The commission

payment entry created from a final customer payment will show the entire calculated commission payable to the salesperson.

**Suppress Zero Pmt. Entries** – CMS will generate Commission Ledger Entries with a zero amount for documents that will receive no commissions (due to lack of minimum margin % or other setup options). This allows users to see why a salesperson received zero commission, as well as track sales or profit information for staff that is marked as non-commissionable.

In addition, CMS creates zero payment entries as cash receipts or closing entries are applied to the open invoice. By checking the Suppress Zero Pmt. Entries, CMS will no longer create the zero Payment entries, and therefore these entries will not show up on any reports, such as the Payable Commissions Report. Note that the zero entries for the original sales document will still be created for the reasons stated above.

We recommend that you include zero entries as they answer the questions of why a commission was not paid. Since new systems are often suspect, it is especially recommended that you keep zero payment entries for the first few months of actual usage.

**Commission Item Cost Adjust** – Allows you the freedom to choose whether you want CMS to adjust commissions based upon changes created when the Adjust Cost function is run. By checking this option, if Item Ledger Entries are adjusted by the Adjust Cost Function, a reversing Commission Ledger Entry is created, along with a replacement entry based on the updated, corrected cost. If the Commission Item Cost Adjust field is not checked, no commission adjustments will be made

**System GUID** – Is a unique identification for the install of CMS. It is automatically generated and not editable by users. It is part of CMS' licensing.

**Trial Active Through** – Is automatically set to 30 Days after CMS is initially installed. Trial period will expire after this date if no license is entered.

**Live Active Through** – Is the data that CMS will be active based on the License Key entered.

**License Key** – Is obtained from Sikich to activate the installed instance of CMS

## DEFAULT TAB

The Default Fast Tab provides a place for various default settings that will be used throughout CMS. Following are descriptions of each of the fields on this Fast Tab.

The screenshot displays the 'Commissions Setup' page in Dynamics 365 Business Central. The page is titled 'Commissions Setup' and is located under 'Customers > Commissions Setup'. The 'Environment' is set to 'Sandbox'. The page is divided into several sections:

- Actions:** A section for performing actions on the setup.
- General >:** A section for general settings.
- Defaults:** A section for default settings, divided into two columns:
  - NEW ENTITY DEFAULTS:**
    - Salesperson Commissionable:
    - Default Salesperson Comm. %:
    - Item Commissionable:
    - Default Item Commission %:
    - Default Percent Type:
    - Default Expiration Days:
  - PAYABLES:**
    - Payables Interface Active:
    - Commissions Payable Template...:
    - Commissions Payable Batch Na...:
    - Default Expense Account:

**Default Salesperson/Item Commission %** - This percentage will default into new Salesperson/Item/Account/Resource/ & Fixed Assets records to be used while calculating Level IV commissions.

**Default Percent Type** - When running reports CMS provides two ways to view calculated commissions, either by Base or by Total. By choosing one of these options on the Default Fast Tab, the options tabs for reports will default to this choice. The user also has the option of overriding the default setting at the time the report is run. Please refer to the [User Manual](#) sections **How Commissions are Calculated** and **Reports** for a detailed explanation of Base and Total.

**Default Expiration Days** - Another feature CMS provides is the ability to expire commissions on invoices that have not been paid after a specified number of days by running an Expire Commissions Function located under the Periodic Activities Section of Commissions Management System. By entering a number in this field, you are establishing a default number of days you wish CMS to use to mark commissions expired. This number will default onto the options tab of the Expire Commissions Function; however a user will be able to override it when the report is run.

Also Included in the Defaults Fast Tab is the Payables Section. Following are descriptions of each of the fields in this section.

**Payables Interface Active-**

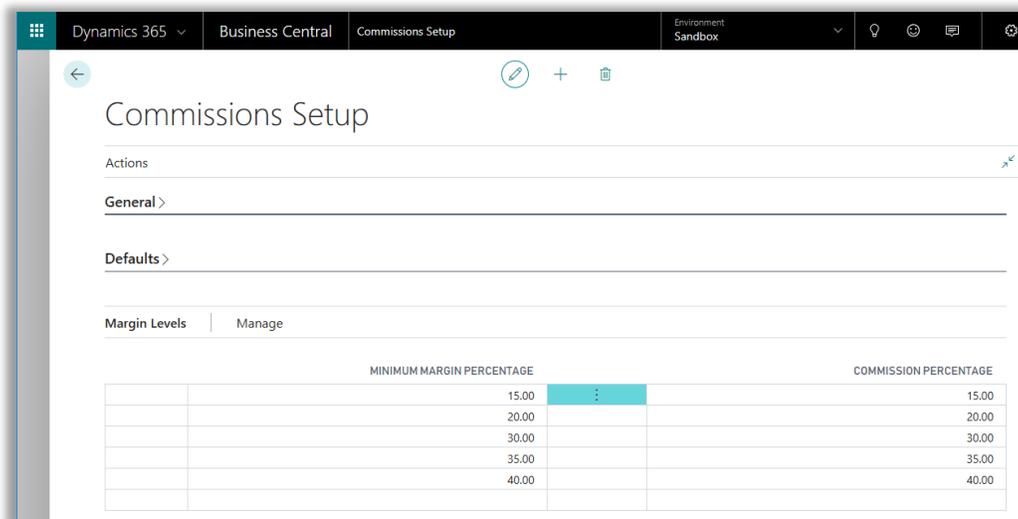
**Commissions Payable Template Name-** This field is used in selecting a template for the Commissions payable batch.

**Commissions Payable Batch Name-** This field is a sub field of the Template Name. This is the journal that will be used to record commission earnings and payments.

**Default Expense Account-** This allows you to select the account that default expenses will hit

**MARGIN LEVELS FAST TAB**

This Fast Tab is used to establish margin commission percentages by entering in a minimum margin percentage and the corresponding Commission percentage. We will discuss Margin levels in detail in the next section. Margin levels are Level III commissions.



This completes the Commissions Setup Form. We will now review how to setup the various commission levels of CMS.

## Commission Level Setup

There are several levels (methods) of calculating commissions: Specific, Entity, Group, Margin, and Salesperson. The commissions system decides which method to use by checking each level for a match and then moving to the next level if a match is not found.

The logic CMS uses to select a Commission % is as follows:

1. Check to see if either the Entity being sold or the Salesperson is marked as commissionable. If this is not the case, a commission % of zero is used.
2. Attempt to find a Specific (Level I) commission match for the line. This is done by looking for a specific commission with matching Salesperson, Entity, and/or Job.
3. Check the Entity (Level II) to see if a Commission % has been specified. If the Commission % field is zero, CMS proceeds to the next level.
4. Check to see if there is a Group (Level III) commission rate, based on a specific item and customer group. If no group is linked to a customer or item, proceed to the next level.
5. If the Entity is an Item, margin percent is calculated and the corresponding Commission % is found in the Margin Commissions (Level IV) setup.
6. If none of the above checks is successful, the Commission % specified on the Salesperson (Level V) is used.

Only one of these levels can apply to any single sales line, but if there are multiple lines on a document, each line can use a different level.

### LEVEL I – SPECIFIC COMMISSION SETUP

Specific commissions assign percentages for specific combinations of salespeople, & items. Specific commissions take precedence over all other system commission settings. Specific Commission percentages are entered on the Item Fast Tab on the Salesperson’s Commissions Card. A Salesperson’s Commission Card can be accessed by Double Clicking the appropriate salesperson. On the Salesperson’s Card choose the Commissions button from the Process Actions Group from the Action Pane.

EFFECTIVE DATE	ENDING DATE	CUSTOMER NO.	JOB NO.	ITEM CATEGORY CODE	NO.	COMMISSION PERCENTAGE	ENTITY DESCRIPTION
				MISC		2.30	Non Entity-Specific
					1896-S	2.20	ATHENS Desk
		10000				3.20	Non Entity-Specific
9/1/2017	12/31/2017	10000				3.65	Non Entity-Specific

The Item Specific Commissions Fast Tab provides you with a way to enter commission information for specific combinations of items to a salesperson.

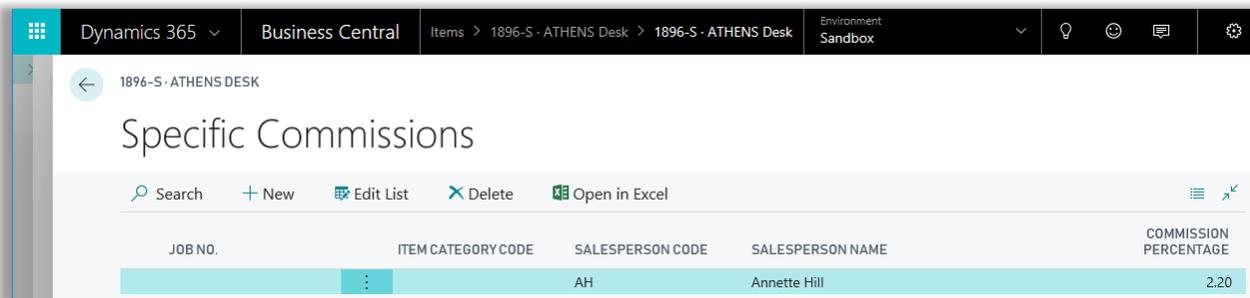
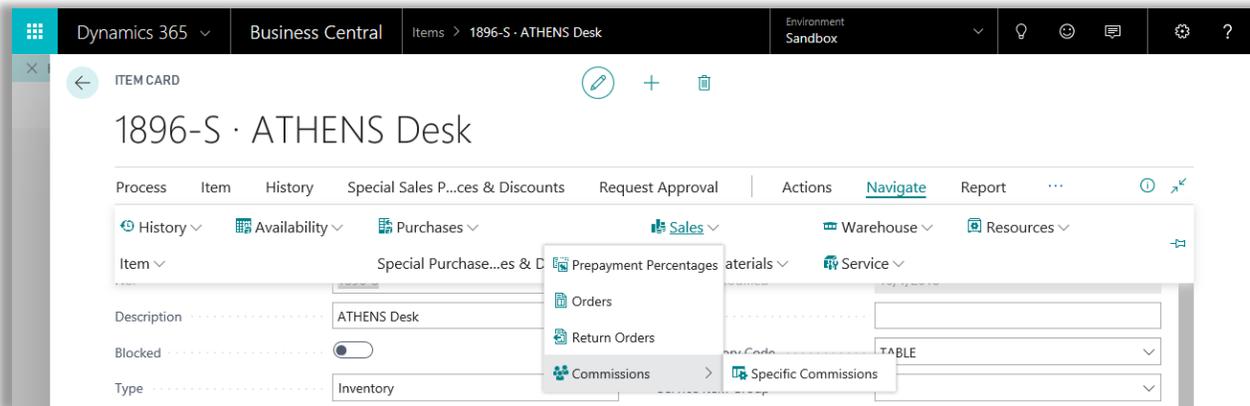
To establish a Specific Commission percentage, simply go to the Item Fast Tab, enter the number of the entity in the No. field and then enter the commission percentage in the Commission % (Base) field.

**Reminder:** Because this Specific Commission setup is a Level I calculation, the commission criteria entered here overrides the commission percentages entered on the Salesperson Commission Card's and on Entity cards. For example, if the item card 1896-S has a commission established of 2.25% (a Level II – Entity setting), the 2.2 percent Commission % on the Item tab of Annette Hill's Salesperson Commission Card overrides the 2.25% on the Item card, so Linda is eligible for 2.2% commission.

You can also view and enter Level I – Specific Commission criteria from an Entity Card. Open an Item card and choose the Navigate Tab located on the Action Pane. From Navigate in the Resources Action Group choose the Specific Commissions button under the Sales Group.

On the next page we can see the relationship between the Entity Card (in this case Item No. 1896-S) and the Specific Commissions form. If a Specific level record has already been set up for this item, it will appear on the form. In this example, we can see the relationship is consistent for both Linda and for the Item No. 1896-S.

If you want to enter additional Specific criteria, you can do so by filling in the appropriate salesperson code and commission percentage in the Item Entity Specific Commissions table. As stated above this information would then display on each salesperson's Commission Card.



## LEVEL II – ENTITY COMMISSION SETUP

Entity level commissions are entered on the Items.

There are two setup options. The first is the Commissionable field, if this is not checked CMS will not calculate commissions for this entity, regardless of whether a Commission % has been entered or not. The commission management system comes with one-time use programs that will set all existing entities up correctly. New entities take on the default setting established for that entity type in the Commission Setup.

Second is the Commission %. Entity commissions and they determine that when this entity is sold – if there is not Level I criteria established – CMS will use the commission percentage on the Entity Card. As shown here, Item No. 1896-S commissions would be calculated at 2.25%.

### User Note:

If you have specific commission criteria you wish to enter for multiple sales people you can enter that information directly onto the Entity card. By adding a line for each salesperson directly on the entity card, you no longer need to go to each individual salesperson's commission card, this saves you time.

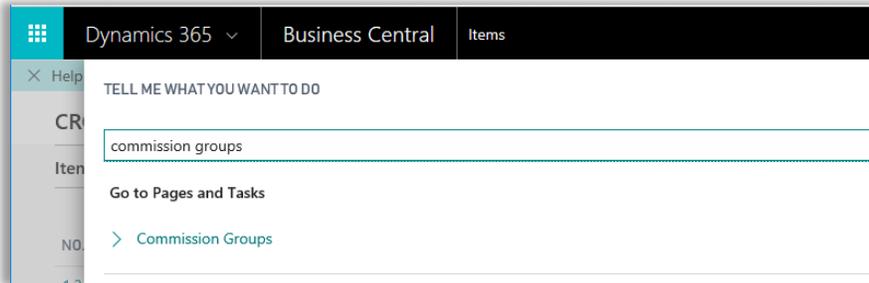
The screenshot shows the Dynamics 365 Business Central interface for the 'ITEM CARD' of '1896-S · ATHENS Desk'. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Items > 1896-S · ATHENS Desk'. The main content area displays various item details:

- Item >** PCS
- Inventory >** 4
- Costs & Posting >** 780.70, RETAIL, FURNITURE, RESALE
- Prices & Sales >** 1,000.80
- Replenishment >** Purchase
- Planning >** None
- Item Tracking >**
- Warehouse >**
- Commissions**
  - Commissionable:
  - Commission Percentage:

### LEVEL III – COMMISSION GROUPS

The Commission Groups by searching for Commission Groups. A Commission Group rate may be established based on a combination of the Customer Discount Group and the Item Category Code. Since the price discounting is based on this code it only makes sense that commissions get linked to the same value.

Note: A customer group can be entered without an item category. In that situation, the salesperson would get the rate on that line for all item categories if the customer is in the customer discount group.

A screenshot of the Dynamics 365 'Commission Groups' list view. The table displays a list of commission groups with columns for 'CUSTOMER DISC. GROUP', 'ITEM CATEGORY CODE', and 'COMMISSION PERCENTAGE'. The first row is highlighted in blue.

CUSTOMER DISC. GROUP	ITEM CATEGORY CODE	COMMISSION PERCENTAGE
LARGE ACC	FURNITURE	25.00
LARGE ACC	MISC	35.00
RETAIL	CHAIR	30.00
RETAIL	FURNITURE	30.00
RETAIL	MISC	20.00
SMALL ACC		15.00

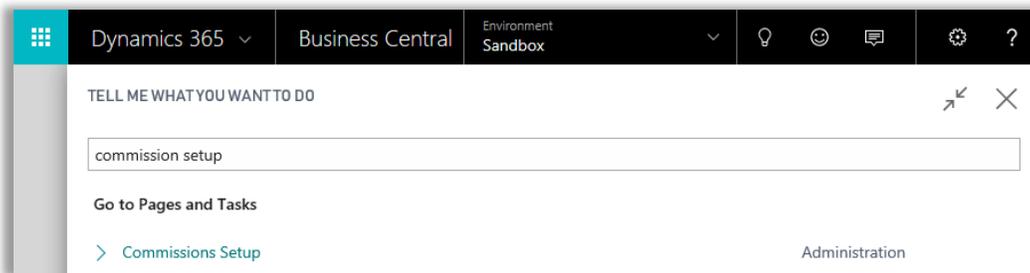
For example:

- A commission amount of 25% is available for selling an Item Category of Furniture to a LARGE ACC Customer.
- A commission amount of 35% is available for selling an Item Category of MISC to a LARGE ACC Customer.
- A commission amount of 30% is available for selling an item within Item Category Code of CHAIR to a RETAIL customer
- A commission amount of 30% is available for selling an item within Item Category Code of FURNITURE to a RETAIL customer.
- A commission amount of 20% is available for selling an item within Item Category Code of MISC to a RETAIL customer.
- A commission amount of 15% is available for selling any item to a SMALL ACC customer.

## LEVEL IV – MARGIN

If you wish CMS to calculate commissions based upon margins (i.e. percentage profit), you must first establish margin level(s) and corresponding commission percent(s) to be used in the Margin Commissions table in the Margin Levels Fast Tab. Commission Management calculates margin percentage based upon the Margin (Profit/Cost) or Profit (Profit/Price) option you choose in Commissions Setup. The appropriate matching Commission % is then found in the Margin Commissions table in the Margin Levels Fast Tab.

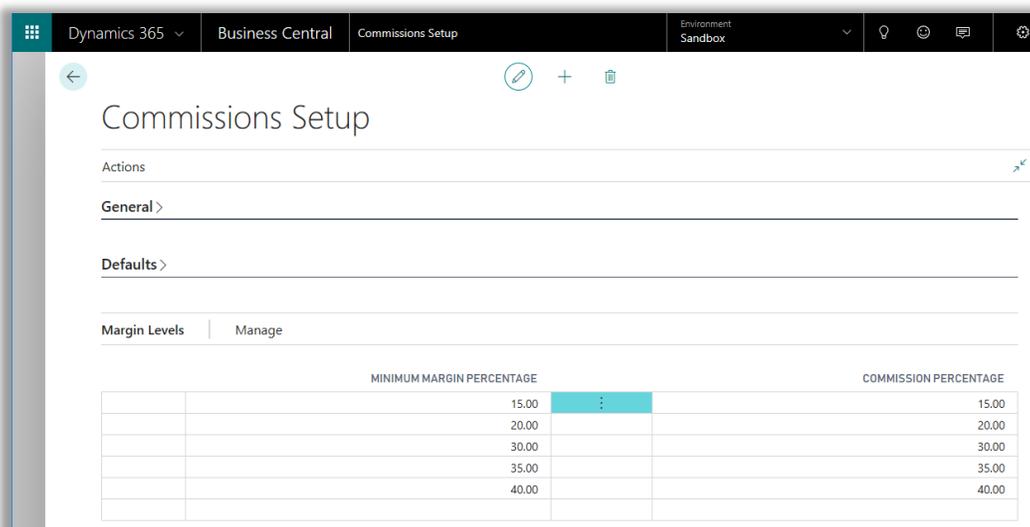
To enter margin levels, you must do so from the Commissions Setup Form. Select the Margin Levels tab and fill in the Minimum Margin % and Commission % (Base) as desired.



Please note that margin percentages are calculated by sales line. This means that even though an Invoice may have an overall Profit % (as can be seen on the standard statistics screen) that qualifies for a commission, the salesperson will not receive commissions on lines that do not meet the minimum requirements.

In addition, a “zero level” is assumed. This means that in this example we do not have to create a line with a Minimum Margin % of zero and a Commission % of zero. Any sales lines with a margin percent below 15% will automatically receive no commission.

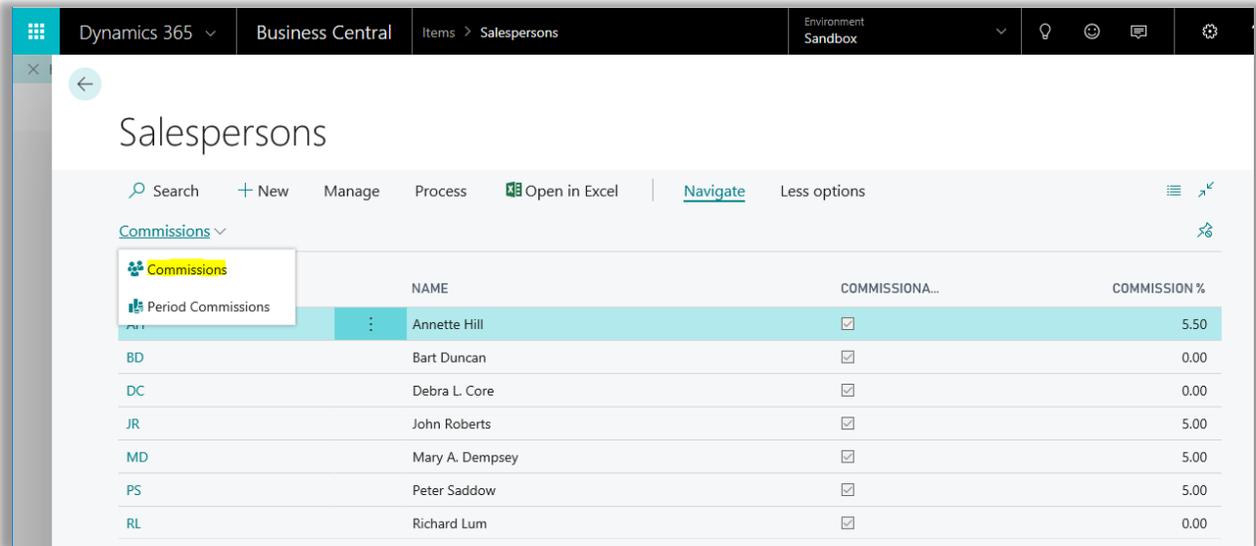
**User Note:**  
 Margin percent's work with negative Base Amounts. When using Profit based commissions it is possible to receive a negative margin on a line. CMS handles this negative margin by calculating negative commissions and generates negative commission ledger entries. Margin calculations will follow the same commission percentages in the Margin Level table for negative Base Amounts as it does for positive Base Amounts.



## LEVEL V – SALESPERSON

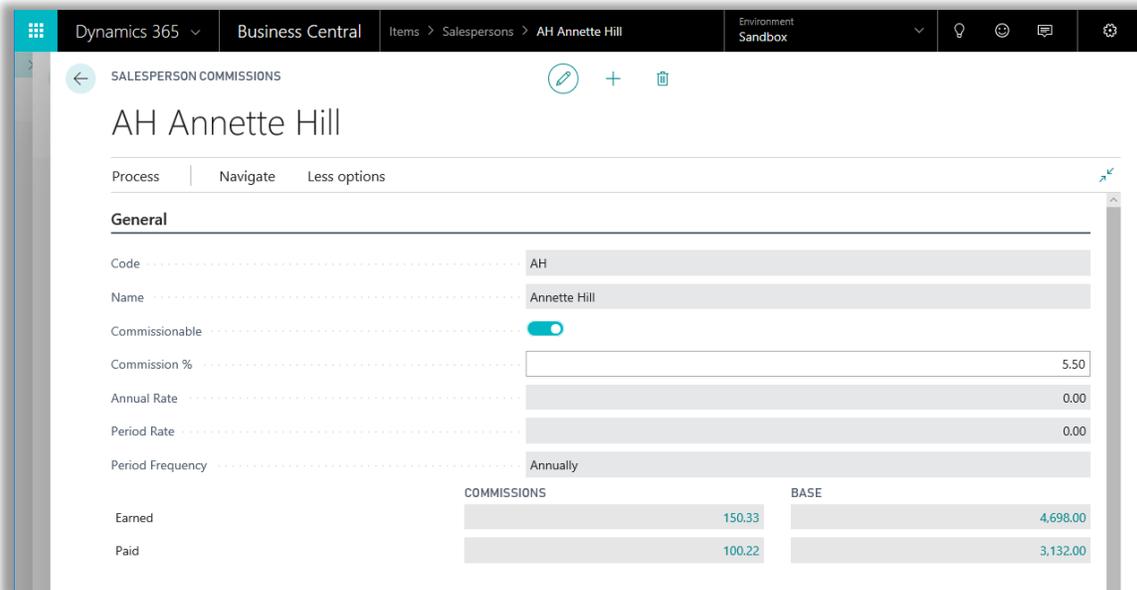
The Salesperson Commission percentage is listed on the Salespeople/Purchasers card which can be found by searching for salespeople. Next, double click on the row of the salesperson to reveal their Salesperson/Purchaser Card. Select the Commissions button in the Process actions group on the Navigate Tab.

The second option takes you directly to the Salesperson Commissions Card show below.



If no Specific (Level I), Entity (Level II), Group (Level 3) or Margin (Level IV) criteria has been entered, then this field is used as the commission percentage.

In the example below, we can see that Annette is commissionable and that her Level V rate is 5.5%.

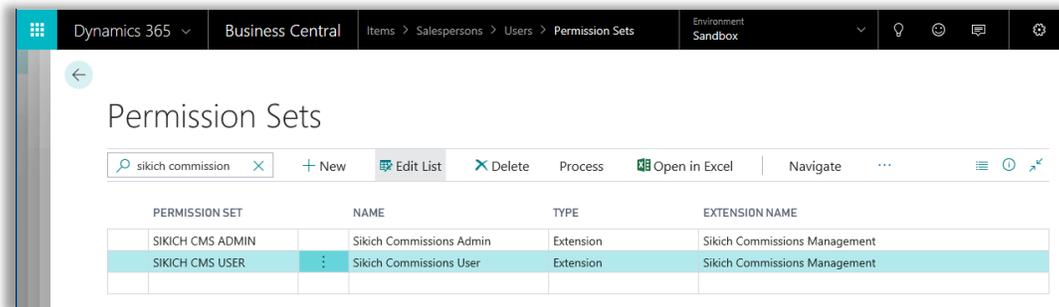
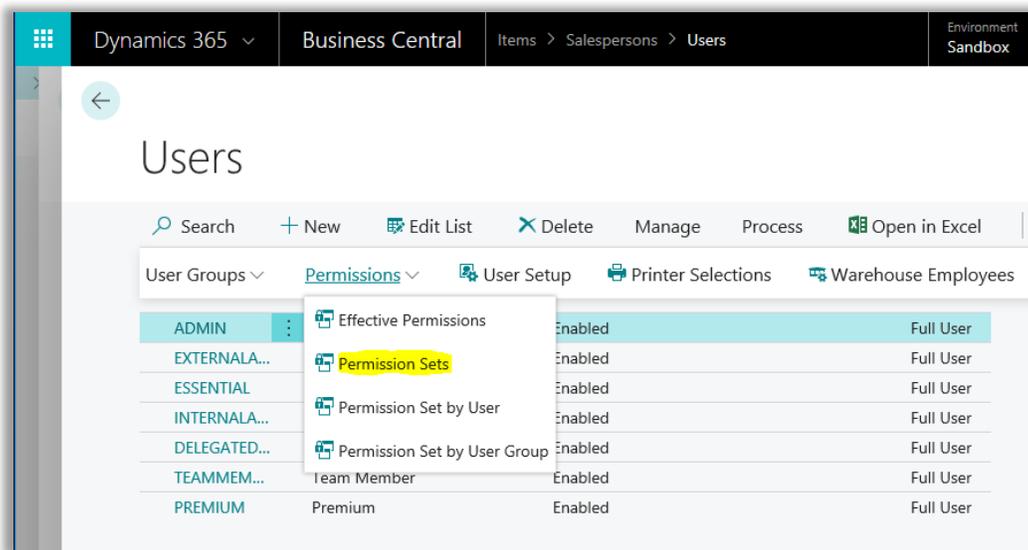


## USER SETUP TABLE AND SECURITY

Security must be addressed before users can begin using CMS. All users in the database will either be a Sikich CMS Admin or a Sikich CMS User. These Security Roles for CMS allow you to access certain portions of the CMS functionalities in Microsoft Dynamics 365 Business Central.

### COMMISSION SECURITY PERMISSIONS

Permission Sets can be found by searching for Users and then clicking on Permission Sets. The commissions role is where all the permissions required to run the necessary forms, reports, tables, etc. are established. You only need to create one permission set because we may control user functions with the Commissions Supervisor Permissions control discussed below.



You now need to assign the roles to the users that will need to use the commission functionality. In Microsoft Dynamics 365 Business Central permission sets are assigned from the User's card.

If a user is assigned both SIKICH CMS ADMIN and SIKICH CMS USER then the user will be allowed to use & setup the CMS functionality as they have all the Commissions Permission Sets assigned to his User ID. Refer to standard Microsoft Dynamics 365 Business Central help for security setup. Your Microsoft Business Solutions Consultant will also be able to assist you in this area.

SIKICH CMS ADMIN controls setting up the commission functionality, viewing all commission entries, and marking commissions as paid.

SIKICH CMS USER allows the user to create sales orders with commissions, invoice sales orders with commissions and lastly view their sales person commissions.

**Security Note:** When creating the CMS Permissions Role, all permissions should be established as non-restrictive (view/edit/etc. - all marked as yes). CMS handles the ability to view and edit commission information data based upon the user setup option of Commission Supervisor Permissions. One thing to note as with standard Microsoft Dynamics 365 Business Central, if a user has permissions to Zoom or the Object Designer, they will have access to all data – Commission Supervisor rights do not affect these areas.

## USER SETUP

The second step is performed in the User Setup Table, which can be found by search Microsoft Dynamics 365 Business Central for User Setup. Here you will fill in the Salesperson code associated with that User. These two options (SIKICH CMS ADMIN permission set and the Salesperson Code field) work in tandem to provide the bulk of security in CMS.

If a user has the permission set SIKICH CMS ADMIN than the user will be allowed to view all salespeople commissions, post commission adjustments, insert manual commissions, and mark commissions as paid.

If the user only has the permission set SIKICH CMS User than the use will only be allowed to view the commissions associated with the salesperson tied to their User Setup record.

In this example Admin can only see commissions for the salesperson AH, unless this user has also been granted the permission set SIKICH CMS ADMIN. In which case, Admin would be allowed to see all commissions in the system along with the other managerial functions.

USER ID	ALLOW POSTING FROM	ALLOW POSTING TO	REG... TIME	SALESPERS... CODE	SALES RESP. CTR. FILTER	PURCHASE RESP. CTR. FILTER	SERVICE RESP. CTR. FILTER	TIME SHEE ADMIN	E-MAIL
ADMIN			<input type="checkbox"/>	AH				<input type="checkbox"/>	
			<input type="checkbox"/>					<input type="checkbox"/>	

## CUSTOMER CARD

Access to the Salesperson Base Percentage table has been added to the Customer Card. Entries in this table determine whether commissions for this customer should be split between multiple sales people. You access the table by clicking on the Customer button on the bottom of the Customer Card and selecting the Salesperson Base %. The criteria that are assigned in the Salesperson Base % table from the customer card will be defaulted onto all sales documents and can be overridden at the document level.

In addition to being able to assign the percentage from the Customer button, we have added the Salesperson Base Count Flow field to the Customer Card, General tab. You can use the Flow field as a shortcut option to the Salesperson Base % table.

As you can see in this screen shot, this customer 10000 has two salespeople assigned.

Annette Hill will be paid commissions on 25% of each sales line and Peter Saddow will be paid commissions on 75% of each sales line.

Further explanation of the Salesperson Base Count field occurs in detail in the [User Manual](#), section **Commissions on Sales Documents**.

**Customer Card: 10000 · Adatum Corporation**

**General**

Name	Adatum Corporation	Salesperson Base Count	2
Balance (\$)	6,639.84	Total Sales	88,167.10
Balance Due (\$)	0.00	Costs (\$)	47,583.20
Credit Limit (\$)	0.00	CFDI Purpose	
Blocked		CFDI Relation	

**EDIT - SALESPERSON BASE % - CUSTOMER 10000**

SALESPERSON CODE	EFFECTIVE DATE	ENDING DATE	BASE PERCENTAGE	SALESPERSON NAME
AH			25.00	Annette Hill
PS			75.00	Peter Saddow

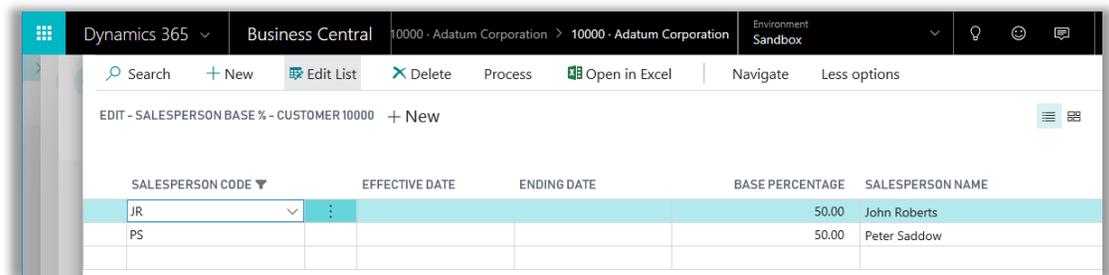
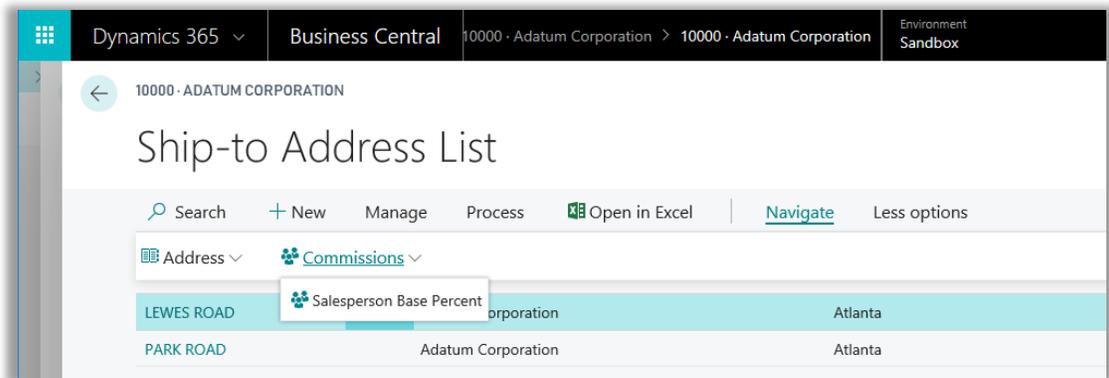
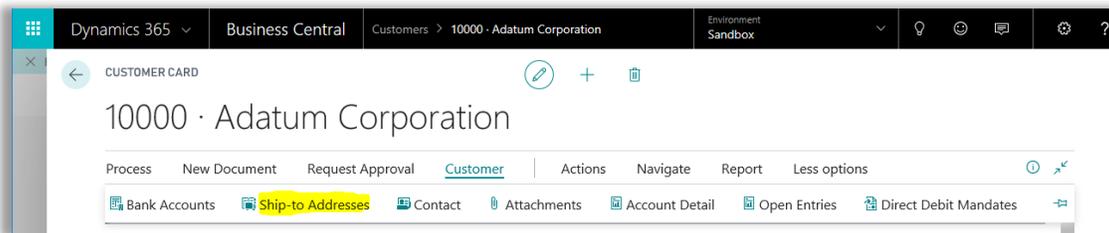
## SHIP-TO CARD

Access to the Salesperson Base Percentage table has been added to the Ship-To Card. Ship-to are sub customer records and can be accessed from the Customer Card.

Entries in this table determine whether commissions for this Ship-to should be split between multiple sales people. You access the table by clicking on the Ship-to Address button from the Navigate tab on the customer card and clicking on the Salesperson Base % field. The criteria that are assigned in the Salesperson Base % table from the ship-to card will only be used if this ship-to is selected on a sales order for this customer. The default values on the sales order will come from what is assigned to the Customer. Just like in the case of the customer card the value assigned to the ship-to can be overridden at the document level.

As you can see in this screen shot, the Ship-to for this customer has two salespeople assigned. John Roberts will be paid commissions on 50% of each sales line and Peter Sadow will earn the other 50% of each sales line.

Further explanation of the Salesperson Base Count field occurs in detail in the [User Manual](#), section [Commissions on Sales Documents](#).



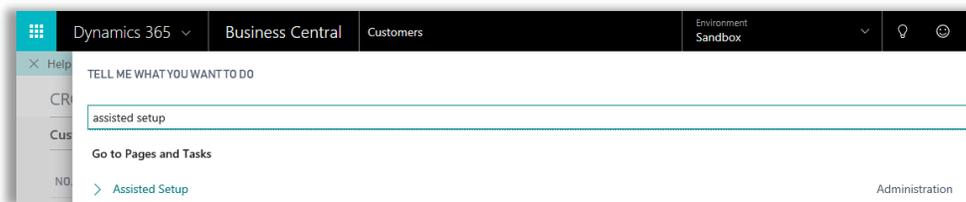
## SETUP PROCEDURES AND TIPS

The Commissions Management System has many powerful and flexible options that allow you to tune its operation to your business. Because of this, setup and testing of the CMS can be a challenging process. In this section, we will point out some procedures, helpful reports, and tips that will allow you to ensure a successful implementation of CMS.

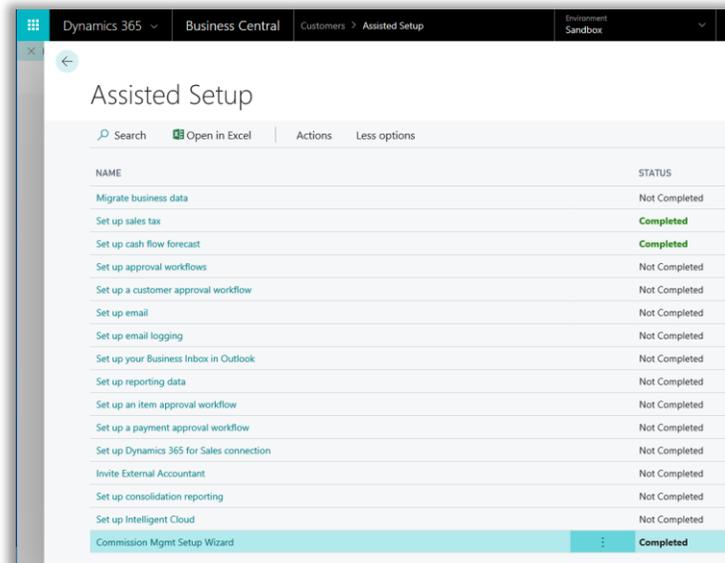
An assisted setup wizard has been created for Commissions Management.

### COMMISSIONS MANAGEMENT SETUP WIZARD

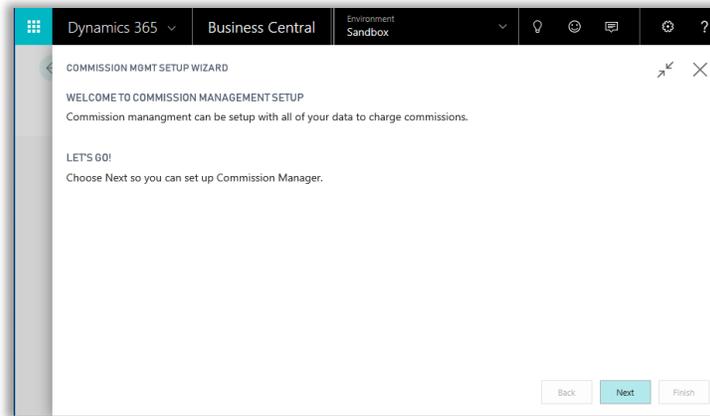
We will now show you how to use the Assisted setup wizard for Commissions Management search for Assisted Setup



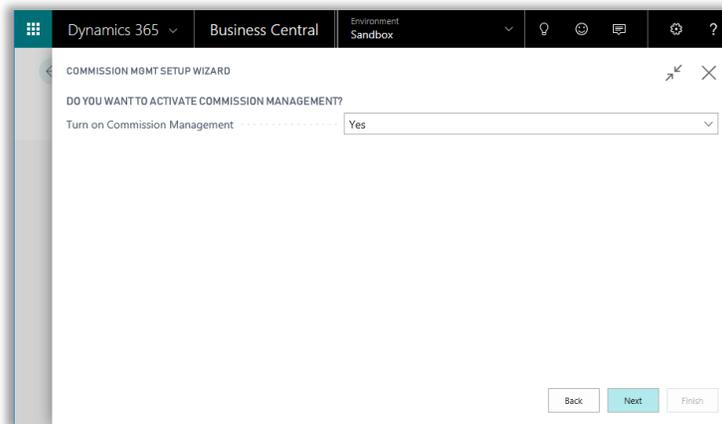
Select "Commission Mgmt Setup Wizard"



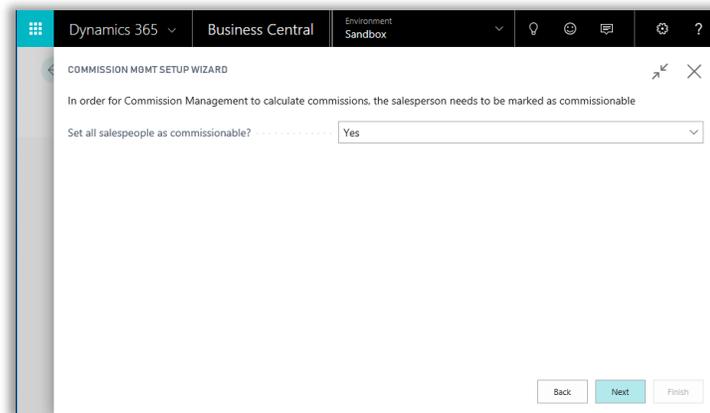
Click Next to begin the Setup Wizard



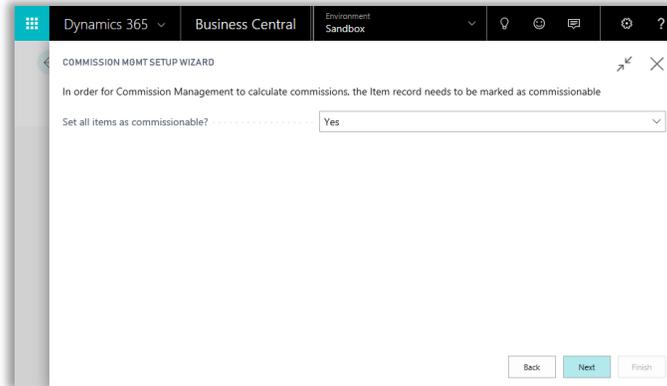
Turn on Commissions Management – Yes/No



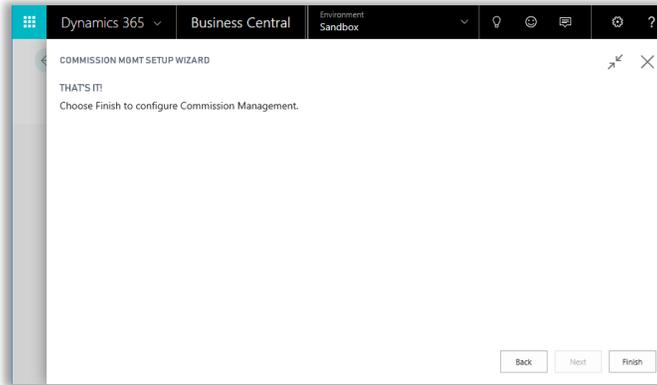
Set all salespeople as commissionable – Yes/No



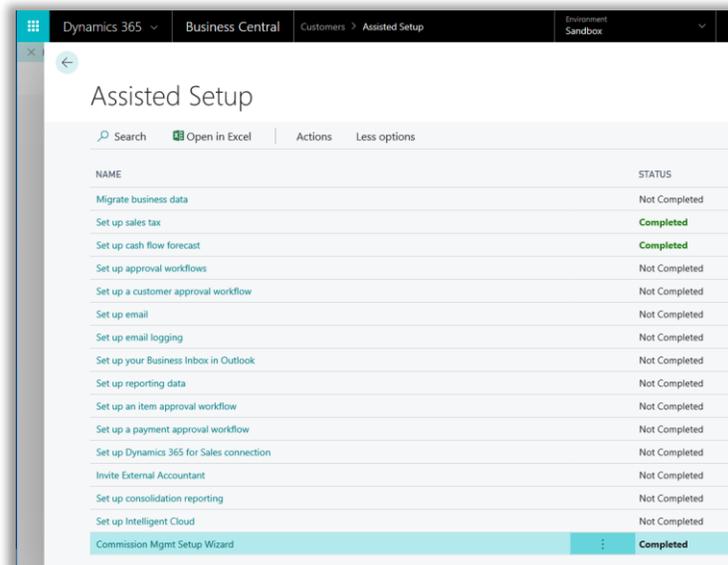
### Set all Inventory Items as commissionable – Yes/No



### Choose Finish to configure Commissions Management



### The setup wizard should now have a status of “Completed”



## **SUGGESTED SETUP PROCESS**

The below steps will guide you through our recommended setup process.

1. Run the Assisted Commissions Setup wizard, this will provide default setup values.
2. Review the settings in Commissions Setup and make any desired changes. Be sure to set up Group (Level III) or Margin (Level IV) commissions if they are going to be used.
3. Setup any Specific (Level I) commissions from the Salesperson Commissions cards or Entity cards.
4. Setup Entity (Level II) commissions on Entity cards. If you choose to in the setup wizard, all items could have been set as Commissionable. You can then make any changes necessary for exceptions.
5. Verify correct Salespeople on Customers and or Ship-to Addresses. Specify any split commissions by modifying the Salesperson Base % records.
6. Test all aspects of the system to ensure that proper commissions are calculated as expected.

These steps should provide for a smooth integration of the CMS into your Microsoft Dynamics 365 Business Central environment, while minimizing setup issues in your live database

## **CONCLUSION**

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This concludes the documentation on Setup Requirements for CMS. Thank you for choosing our product. We hope you are excited about the flexibility you are about to experience in establishing commission pay plans. You will see the benefits in increased sales, your company's bottom line and the paychecks of your sales staff!