Advanced Sales Commissions

User Guide

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Advanced Sales Commissions

This application allows you to handle advanced commission calculation rules.

You can book commission per sales line and them create purchase invoices to pay your salespeople in a fully automated way.

Features and benefits using this extension

- Define different commissions per customer, customer group, item, item group
- Define salesperson per sales line
- Define commission payment triggers per salesperson
- Calculate and pay commissions to your employees and to your external salespeople
- Track commissions and payments in real time

Supported languages:

English, French

Supported editions:

This app supports both Essential and Premium editions of Microsoft Dynamics 365 Business Central.

User Guide

This application allows you to manage paid back commissions to sales representatives in the form of purchase invoice or to employees in the form of payement journal.

Define commissions

You define the commissions of a salesperson from the salesperson card. You can specify commissions that apply for all customers, for a group of customers or a single customer. Regarding the items sold, the commission can be assigned to all items, a category of items or a single item. The commissions are assigned to a customer or group of customers.

To do this, follow the steps below :

1. Choose the icon 💡 and type **Salespeople/Purchasers**.
2. Select the salesperson for whom to define commissions.
3. In the action bar, select the action **Sales Commissions**.

Info

You can also view and define commissions from customers, customer price groups, articles or article categories.

1. In the page **Sales Commissions**, complete the target of your commission by filling in the fields **Source Type**, **Source No.**, **Type** and **No.**.

2.Define the **Commission %**.

To define the method of calculating commissions (based on revenue or on the margin expected), follow these steps:

6. Choose the icon 💡 and type **Salespeople/Purchasers**.
7. Select a salesperson and choose the action **Edit**.
8. In   the   salesperson   card,   fill   in   the   field **Calculation   Mode**.
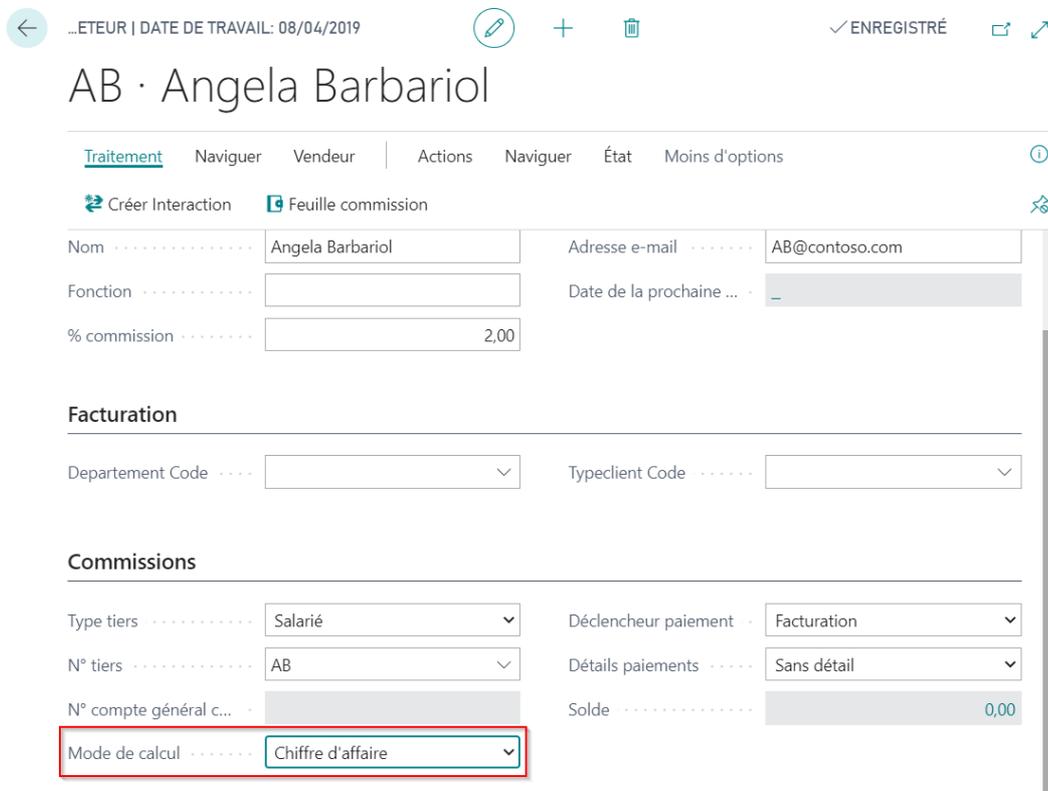
| ← | ...ETEUR \| DATE DE TRAVAIL: 08/04/2019 | ✏ | + | 🗑 | | ✓ENREGISTRÉ | ⬈ ⬈ |

AB · Angela Barbariol

| Traitement | Naviguer | Vendeur | \| | Actions | Naviguer | État | Moins d'options | ⓘ |

🔁 Créer Interaction   💷 Feuille commission   ⚲

Nom · · · · · · · · · · · · · ·	Angela Barbariol	Adresse e-mail · · · · · · · ·	AB@contoso.com
Fonction · · · · · · · · · · ·		Date de la prochaine ... · ·	_
% commission · · · · · · · ·	2,00		

Facturation

| Departement Code · · · · | ▼ | Typeclient Code · · · · · · · | ▼ |

Commissions

Type tiers · · · · · · · · · · ·	Salarié ▼	Déclencheur paiement · ·	Facturation ▼
N° tiers · · · · · · · · · · ·	AB ▼	Détails paiements · · · · · ·	Sans détail ▼
N° compte général c...		Solde · · · · · · · · · · · · · ·	0,00
Mode de calcul · · · · · ·	Chiffre d'affaire ▼		

Calculation modes work like this :

| revenue | The commission % applies on the amount excluding tax sold including the discount and the invoice discount granted to the customer. |
| Expected margin | The commission % applies on the expected margin including the line discount and the invoice discount granted to the customer. The expected margin (also called initial margin) is based on the unit cost of the item at the time of ordering. |

You can now start registering orders to generate commissions.

Sales process

In sales documents, you can define a salesperson in the document header by filling in the field **salesperson code**. You can specify a different **salesperson Code** on each sales line; by default, the **salesperson code** chosen in the header is used.

In the lines, the **Commission %** is calculated using the best valid commission rate. You can change the commission rate or enter it manually in the document lines.

The amount of the commission is recorded at the time of invoicing. Commission entries are recorded each time a commissioned line is billed. If you post a credit note, a decommissioning entry is recorded (commission with negative amount).

Calculation of the best commission

When you have saved commissions for sales, the application ensures that the commission is always optimal by calculating automatically the best commission.

The best commission is the highest commission that can be applied on a given date by considering the customer, the article, the group of customers and the article category.

Control commissions

Commissions are recorded as and when invoiced. You can check a salesperson's commission entries by browsing the **Commission Journal** from the **Salespeople/Purchasers** form.

From the **Salespeople/Purchasers** card, the **Balance** field indicates the amount of commissions you owe the salesperson.

Account the regulation of commissions

After recording commissions for salesperson, you can settle the amounts owed in three ways:

- by invoicing a supplier from a purchase invoice;
- by paying an employee from a payment journal;
- by recording an extra-accounting entry from a commission journal.

The following paragraphs treat the first two cases. Refer to the paragraph Manually record commissions for the last case.

Configure salespersons

Before starting commissions payment, you must configure the salespersons to indicate to the application how to direct billing.

1. Choose the icon 💡 and type **Salespeople/Purchasers**.
2. Select a record and choose the action **Edit**.
3. In the page that opens, fill in the following fields :

Field	Use
Tiers Type / Tiers No.	Indicates whether you want to post payments by generating invoices for a supplier or payments for an employee. The **Tiers No.** specifies the number of the supplier or employee account.
Commission G/L Account No.	Used only for the creation of supplier invoices, this field indicates the general account in which the commission payment is posted.
Payment Trigger	Indicates when the commission must be paid.

Generate salesperson payment proposals

To create commission invoices or payments for employees, follow the steps below : Create Commission Payment Proposals

1. Choose the icon 💡 and type **Create commission payment proposals**.
2. In the page that opens, fill in the following fields :
   - Posting Date.
   - If you are paying employees, enter the **Batch Name** in which to insert the payment proposals and the Bank account.

CRÉER LES PROPOSITIONS DE PAIEMENT DE COMMISSIONS

Paramètres enregistrés >

Options

Date comptabilisation ·   08/04/2019

PAIEMENTS SALARIÉS

Nom feuille ·   GENERAL

N° document début ·   G04002

Compte bancaire ·   CPTE CHÈQUES

Filtre: Vendeur/Acheteur

× Code ·   AB

+ Filtre...

Filtrer les totaux par:

+ Filtre...

Filtre: Ecriture comptable commission

× Date comptabilisation ·   01/01/19..31/12/19

+ Filtre...

[Planifier...]   [OK]   [Annuler]

3. Select the action **OK**.

The proposals relate to unreconciled commission entries which are not **Pending**.

Info

Use the filters on commission entries to limit the proposals to a given period or a salesperson.

Supplier invoices are generated in **Purchase invoices** and employee payments in the **Payment Journal** that you specified. Now go to these pages to validate them.

Manually post commissions

You can manually post commissions and commission payments using the **Commission Journal**.

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