

Acumens Flexible Commissions R1-Usage Scenarios Documentation.

Versions Supported:

Dynamics BC 24

Prepared & developed by

SBC Dynamics ERP

Document History

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1 Application Overview

Acumens Flexible Commissions R1 redefines how you manage sales compensation with a sophisticated and adaptable solution. This app integrates seamlessly with your General Ledger and Accounts Payable systems to ensure precise and efficient commission management. It's perfectly suited for W2 Employees, 1099 Vendors, and referral partners.

Key Features:

- **Versatile Commission Management:** Efficiently handle commissions for various recipient types, including W2 Employees and 1099 Vendors, and reward Sales Managers based on team performance.
- **Customizable Commission Configuration:** Set commission rates by Salesperson, State, Location Code, and Item/Resource/Fixed Asset/G/L Account. Choose between percentage rates or fixed amounts per quantity.
- **Flexible Calculation Methods:** Calculate commissions based on Sales, Gross Profit, or Per Quantity, tailored to your sales strategy.
- **Efficient Payment Processing:** Disburse commissions only when Sales Invoices are fully paid and track all commissions as accounts payable entries.
- **Advanced Tracking and Splitting:** Allocate commissions between multiple Salespersons and referral Vendors and access detailed transaction records through a comprehensive commission ledger.

2 System Requirements

Acumens Flexible Commissions R1 is an extension for BC365 supports all BC365 deployment scenarios and imposes no additional requirements nor restrictions on the standard system requirements for BC365.

Acumens Flexible Commissions R1 requires Microsoft Dynamics 365 Business Central version 14.00 or later and works with all BC365 clients (Dynamics NAV Web Client, Dynamics NAV Tablet Client, Dynamics NAV Phone Client (in a Browser) and Dynamics NAV Universal App)

2 Setups

Acumens Flexible Commissions R1 has five main setups.



2.1 Commission Rates

Commission Rate can be defined per Salesperson Code, State, Location Code and Item/Resource/GL Account/Item Charge.

The screenshot shows the 'Commission Rates' setup screen. It features a table with columns for Salesperson Code, State, Location Code, Type, and various commission rates. The table is currently empty, and a new record is being added.

Salesperson Code	State	Location Code	Type	Salesperson 1 Commission Method	Salesperson 1 Base Amount %	Salesperson 1 Commission %	Salesperson 1 Commission Amount	Salesperson 2 Commission Method	Salesperson 2 Base Amount %	Salesperson 2 Commission %	Salesperson 2 Commission Amount	Manager Base Amount %	Manager Commission Method	Manager Commission %	Manager Commission Amount
			G/L Account	Percentage	100.00	30.00		Percentage	100.00	30.00		100.00	Percentage	3.00	
			Item	Percentage	100.00	30.00		Percentage	100.00	30.00		100.00	Percentage	3.00	
			Resource	Percentage	100.00	20.00		Percentage	100.00	20.00		100.00	Percentage	2.00	
			Fixed Asset	Percentage	100.00	40.00		Percentage	100.00	40.00		100.00	Percentage	4.00	

2.2 Commission user setup

Commission user setup implements security filters for to limit users to view Commission Document Entries and Commission Entries. User can access records based on their role. It can be Administrator, Sales person or Sales Person manager Role.

The screenshot shows the 'Commission User Setup' screen. It features a table with columns for User ID, Salesperson/Purch. Code, Commission Role, Location Filter, Salesperson Code Filter, Department Filter, Customer Group Filter, State Filter, Commission Purchase Jnl Template Name, Commission Purchase Jnl Batch Name, Commission Payment Journal Template Name, and Commission Payment Journal Batch Name. The table is currently empty, and a new record is being added.

User ID	Salesperson/Purch. Code	Commission Role	Location Filter	Salesperson Code Filter	Department Filter	Customer Group Filter	State Filter	Commission Purchase Jnl Template Name	Commission Purchase Jnl Batch Name	Commission Payment Journal Template Name	Commission Payment Journal Batch Name
DEVELOPER	JQ	Admin						PURCHASES	DEFAULT	PAYMENT	DEFAULT
DONSAITO		Salesperson									
GIDEON		Salesperson									

2.3 Commission Setup

This is the main setup where you configure the basic parameters for commission calculation. You can define rules such as commissionable entities, calculation methods, and other general settings

App launcher

Acumens Commission R1 Setup

Old Invoice & Cred... Non-Commissionable Salespersons User Setup More options

General

Enable Commissions R1	<input checked="" type="checkbox"/>	Commission Purchase Journal	
Item Commissionable	<input checked="" type="checkbox"/>	Journal Template Name	PURCHASES
Resource Commissionable	<input checked="" type="checkbox"/>	Journal Batch Name	DEFAULT
G/L Account Commissionable	<input checked="" type="checkbox"/>	Commission Payment Journal	
Item Charge Commissionable	<input checked="" type="checkbox"/>	Journal Template Name	PAYMENT
Fixed Asset Commissionable	<input checked="" type="checkbox"/>	Journal Batch Name	DEFAULT
Calculate Commission On	Sales	Pay Commission On	
Minimum Gross Profit % for Commission	0.00	Salesperson 1	All Invoices
Prevent Negative Commission	<input type="checkbox"/>	Salesperson 2	All Invoices
Start Invoice Date	9/1/2024	Sales Manager	All Invoices
Commission Expense G/L Account No.	10300	Venue Vendor	All Invoices
Copy Commission Rate from Salesperson 1 to Sal...	<input type="checkbox"/>	Caterer Vendor	All Invoices

Captions

Referral Vendor		Referral Vendor 2	
Referral Vendor No Caption	Venue Vendor No	Referral Vendor No 2 Caption	Caterer Vendor No
Vendor 1 Split % Caption	Venue Vendor No 1 Split %	Vendor 2 Split % Caption	Caterer Vendor No 1 Split %
Vendor 1 Commission % Caption	Venue Vendor Commission %	Vendor 2 Commission % Caption	Caterer Vendor Commission %

2.4 Commission Sales Persons

Commission Salespersons

Edit List

Code 1	Name	Not Commisi...	Salesperson 1 Split %	Salesperson 2 Split %	Payee Type	Payee Code	Location Code	Commission Department Code	Commission Customergroup Code
→ BC	Benjamin Chiu	<input type="checkbox"/>	100.00	100.00	W2 Employee	10000			
CAROLINE		<input type="checkbox"/>	100.00	100.00	1099 Vendor	10000			
EH	Ester Henderson	<input type="checkbox"/>	100.00	100.00	W2 Employee	10000			
HR	Helena Ray	<input type="checkbox"/>	100.00	100.00	W2 Employee				
JO	Jim Olive	<input type="checkbox"/>	100.00	100.00	W2 Employee				
LT	Lina Townsend	<input type="checkbox"/>	100.00	100.00	W2 Employee				
MD	John Smith	<input type="checkbox"/>	100.00	100.00	W2 Employee				
OF	Otis Falls	<input type="checkbox"/>	100.00	100.00	W2 Employee				
RB	Robin Bettencourt	<input type="checkbox"/>	100.00	100.00	W2 Employee				

2.5 Periods

2.5.1 Generate Monthly Periods

Commission Month Period

Manage Create Periods More options

Ending Date 1	Name	Period Type	Closed
→ 9/30/2024	2024 September	Monthly	<input type="checkbox"/>
10/31/2024	2024 October	Monthly	<input type="checkbox"/>

2.5.2 Generate Weekly Periods

Commission Week Periods

Manage Create weekly Periods More options

End Date ↑	Period Type ↑	Closed	Name
9/26/2024	1 Week	<input type="checkbox"/>	2024 Week 35
9/8/2024	1 Week	<input type="checkbox"/>	2024 Week 36
9/15/2024	1 Week	<input type="checkbox"/>	2024 Week 37
9/22/2024	1 Week	<input type="checkbox"/>	2024 Week 38
9/29/2024	1 Week	<input type="checkbox"/>	2024 Week 39
10/6/2024	1 Week	<input type="checkbox"/>	2024 Week 40
10/13/2024	1 Week	<input type="checkbox"/>	2024 Week 41
10/20/2024	1 Week	<input type="checkbox"/>	2024 Week 42
10/27/2024	1 Week	<input type="checkbox"/>	2024 Week 43

3 Usage

3.1 Role Center

User Setup has Commission Role which can be

- a) Salesperson

It is used for individual Salesperson.
- b) Sales Manager

It is used for Sales Manager who is assigned team of Salesperson.
- c) Admin

It is used for System Administrator or Commission Administrator.

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Lists History All Reports

Actions

> Items

> Item Charges

> Customers

> Generate Commission Lines

> Commission Payment Journal

> Commission User Setup

> Commission Month Periods

> G/L Accounts

> Fixed Assets

> Commission Document Entries

> Commission Journal

> Commission Setup

> Commission Rates

> Commission Register

> Resources

> Vendors

> Commission Entries

> Commission Purchase Journal

> Commission Salespersons

> Commission Week Periods

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3.2 Commission Entries.

Commission Entries are generated from posted invoices.

Commission Entries

Navigate More options

Commission Type	Commission Code	Document Type	Document No.	Document Line No.	Document Posting Date	State	Sell-to Customer No.	Sell-to Customer Name	Bill-to Customer No.	Bill-to Customer Name	Type	No.	Description
Salesperson 1	BC	Invoice	PS-INV103280	10000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl
Salesperson 1	BC	Invoice	PS-INV103281	10000	9/2/2024		20000	Trey Research	20000	Trey Research	Resource	KATHERINE	KATHE
Salesperson 2	BC	Invoice	PS-INV103281	10000	9/2/2024		20000	Trey Research	20000	Trey Research	Item	1000	Bicycl
Venue Vendor	20000	Invoice	PS-INV103280	10000	9/2/2024	IL	10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl
Venue Vendor	20000	Invoice	PS-INV103280	20000	9/2/2024	IL	10000	Adatum Corporation	10000	Adatum Corporation	Resource	KATHERINE	KATHE
Venue Vendor	20000	Invoice	PS-INV103281	10000	9/2/2024	IL	20000	Trey Research	20000	Trey Research	Item	1000	Bicycl
Caterer Vendor	20000	Invoice	PS-INV103280	10000	9/2/2024	IL	10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl
Caterer Vendor	20000	Invoice	PS-INV103280	20000	9/2/2024	IL	10000	Adatum Corporation	10000	Adatum Corporation	Resource	KATHERINE	KATHE
Caterer Vendor	20000	Invoice	PS-INV103281	10000	9/2/2024	IL	20000	Trey Research	20000	Trey Research	Item	1000	Bicycl
Salesperson 1	HR	Invoice	ASM-PS51000...	10000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	SB10000003	HP La
Salesperson 1	HR	Invoice	ASM-PS51000...	20000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Resource	TERRY	After :
Salesperson 1	HR	Invoice	ASM-PS51000...	30000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	1155	After :
Salesperson 1	HR	Invoice	ASM-PS51000...	40000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Resource	LINA	After :
Salesperson 1	HR	Invoice	PS-INV103278	10000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl
Salesperson 1	HR	Invoice	PS-INV103278	20000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Resource	KATHERINE	KATHE
Salesperson 1	HR	Invoice	PS-INV103279	10000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl
Salesperson 1	HR	Invoice	PS-INV103279	20000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Resource	KATHERINE	KATHE
Salesperson 1	BC	Invoice	PS-INV103282	10000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl

3.3 Commission Document Entries.

Commission Document Entries are generated as below, from the posted sales Invoices.

Commission Document Entries												
<div>Do Not Pay Commission</div> <div>Navigate</div> <div>More options</div>												
Commission Type	Commission Code	Salesperson Code	Sell-to Customer No.	Document Type	Document No.	Document Posting Date	Sell-to Customer Name	Bill-to Customer Name	Description	Location Code	Department Code	Customer Code
Salesperson 2	BC	BC	20000	Invoice	PS-INV103281	9/2/2024	Trey Research		Order S-ORD101126	MAIN	SALES	M
Salesperson 1	BC	BC	10000	Invoice	PS-INV103282	9/2/2024	Adatum Corporation		Order S-ORD101128	MAIN	SALES	SH
Salesperson 1	BC	BC	10000	Invoice	PS-INV103283	9/2/2024	Adatum Corporation		Order S-ORD101129	MAIN	SALES	SH
Salesperson 2	BC	CAROLINE	20000	Invoice	PS-INV103284	9/2/2024	Trey Research		Order S-ORD101130	MAIN	SALES	M
Salesperson 2	CAROLINE	BC	10000	Invoice	PS-INV103280	9/2/2024	Adatum Corporation		Order S-ORD101125	MAIN	SALES	SH
Salesperson 2	CAROLINE	BC	10000	Invoice	PS-INV103282	9/2/2024	Adatum Corporation		Order S-ORD101128	MAIN	SALES	SH
Salesperson 2	CAROLINE	BC	10000	Invoice	PS-INV103283	9/2/2024	Adatum Corporation		Order S-ORD101129	MAIN	SALES	SH
Salesperson 1	CAROLINE	CAROLINE	20000	Invoice	PS-INV103284	9/2/2024	Trey Research		Order S-ORD101130	MAIN	SALES	M
Salesperson 1	HR	HR	10000	Invoice	ASM-PSS1000...	9/2/2024	Adatum Corporation		Order ASM-SO00026	MAIN	SALES	SH
Salesperson 1	HR	HR	10000	Invoice	PS-INV103278	9/2/2024	Adatum Corporation		Order S-ORD101123	MAIN	SALES	SH
Salesperson 1	HR	HR	10000	Invoice	PS-INV103279	9/2/2024	Adatum Corporation		Order S-ORD101124	MAIN	SALES	SH
Sales Manager	JO	HR	10000	Invoice	ASM-PSS1000...	9/2/2024	Adatum Corporation		Order ASM-SO00026	MAIN	SALES	SH
Sales Manager	JO	HR	10000	Invoice	PS-INV103278	9/2/2024	Adatum Corporation		Order S-ORD101123	MAIN	SALES	SH
Sales Manager	JO	HR	10000	Invoice	PS-INV103279	9/2/2024	Adatum Corporation		Order S-ORD101124	MAIN	SALES	SH
Sales Manager	JO	BC	10000	Invoice	PS-INV103280	9/2/2024	Adatum Corporation		Order S-ORD101125	MAIN	SALES	SH
Sales Manager	JO	BC	20000	Invoice	PS-INV103281	9/2/2024	Trey Research		Order S-ORD101126	MAIN	SALES	M
Sales Manager	JO	BC	10000	Invoice	PS-INV103282	9/2/2024	Adatum Corporation		Order S-ORD101128	MAIN	SALES	SH
Sales Manager	JO	BC	10000	Invoice	PS-INV103283	9/2/2024	Adatum Corporation		Order S-ORD101129	MAIN	SALES	SH
Sales Manager	JO	CAROLINE	20000	Invoice	PS-INV103284	9/2/2024	Trey Research		Order S-ORD101130	MAIN	SALES	M

3.4 Commission Journal.

Commission Journal is used to calculate commission for Salespersons, Sales Manager and Vendor referral and review or post it for further processing.

With Commission journal you can.

- Generate Sales Person Commission Using Month Periods.

Commission Journal												
<div>User ID: DEVELOPER</div> <div>ManageShow DocumentCalculate Salesperson CommissionCalculate Sales Manager CommissionCalculate Vendor CommissionPostMore options</div>												
Line No.	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customer Code
10000	Salesperson 1	BC	Benjamin Chiu	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
20000	Salesperson 1	BC	Benjamin Chiu	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
30000	Salesperson 1	BC	Benjamin Chiu	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
40000	Salesperson 1	BC	Benjamin Chiu	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
50000	Salesperson 2	BC	Benjamin Chiu	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
60000	Salesperson 2	BC	Benjamin Chiu	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
70000	Salesperson 1	CAROLINE		Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
80000	Salesperson 2	CAROLINE		Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
90000	Salesperson 1	HR	Helena Ray	Invoice	ASM-PSS10...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
100000	Salesperson 1	HR	Helena Ray	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
110000	Salesperson 1	HR	Helena Ray	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
<div>Base Amount1,947.80Profit Amount531.70Commission Amount468.66</div>												

- Generate Sales Manager Commission Using Custom Dates.

Commission Journal												
User ID: DEVELOPER												
Manage Show Document Calculate Salesperson Commission Calculate Sales Manager Commission Calculate Vendor Commission Post More options												
Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
Base Amount				Profit Amount				Commission Amount				
1,702.40				859.60				170.24				

iii. Generate Vendor Commission Using Custom Dates.

Commission Journal												
User ID: DEVELOPER												
Manage Show Document Calculate Salesperson Commission Calculate Sales Manager Commission Calculate Vendor Commission Post More options												
Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
70000	Sales Manager	JO	Jim Olive	Invoice	ASM-PSS10...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
80000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
90000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
100000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
110000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
120000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
130000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
140000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
Base Amount				Profit Amount				Commission Amount				
3,302.20				1,218.00				208.20				

iv. Show document on Commission Journal.

Commission Journal

✓ Saved

User ID: DEVELOPER

Manage

Show Document

Calculate Salesperson Commission

Calculate Sales Manager Commission

Calculate Vendor Commission

Post

More options

Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
70000	Sales Manager	JO	Jim Olive	Invoice	ASM-P5510...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
80000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
90000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
100000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
110000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
120000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
130000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
140000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM

Base Amount

Profit Amount

Commission Amount

3,302.20

1,218.00

208.20

Commission Journal

✓ Saved

User ID: DEVELOPER

Manage

Show Document

Calculate Salesperson Commission

Calculate Sales Manager Commission

Calculate Vendor Commission

Post

More options

Base Amount

Profit Amount

Commission Amount

3,302.20

1,218.00

208.20

Posted Sales Invoice - PS-INV103282 · Adatum Corporation

Manage

Home

Posting

Approve

Incoming Document

Order

Acumens eSalesTax

...

General

Show less

Close

Commission Amount

208.20

v. **Post Commission Entries.**

App launcher Commission Journal

User ID: DEVELOPER

Manage Show Document Calculate Salesperson Commission Calculate Sales Manager Commission Calculate Vendor Commission **Post** More options

Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
70000	Sales Manager	JO	Jim Olive	Invoice	ASM-PS510...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
80000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
90000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
100000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
110000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
120000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
130000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
140000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
				Base Amount		Profit Amount		Commission Amount				
				3,302.20		1,218.00		208.20				

3.5 Commission Register.

Commission Register shows posted Commission from Commission. It can be already paid or is ready to post AP Payable and then make payments.

Commission Register

Commission Documents Entries Commission Entries Update Payment Info Void Remittance Report More options

Entry No. ↓	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Di
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		

i. On the Commission Register you can void Entries.

Commission Register

Commission Documents Entries Commission Entries Update Payment Info **Void** Remittance Report More options

Entry No. ↓	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Di
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		

Commission Journal

✓ Saved

📄

🔍

🔄

User ID: DEVELOPER

🔍

📄

Manage

Show Document

Calculate Salesperson Commission

Calculate Sales Manager Commission

Calculate Vendor Commission

Post

More options

🔍

📄

🔍

🔄

Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
70000	Sales Manager	JO	Jim Olive	Invoice	ASM-PSS10...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
80000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
90000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
100000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
110000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
120000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
130000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
140000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM

Base Amount

Profit Amount

Commission Amount

3,302.20

1,218.00

208.20

ii. Voided entries are available again on the Commission Journal and can be reposted.

Commission Journal

✓ Saved

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User ID: DEVELOPER

🔍

📄

Manage

Show Document

Calculate Salesperson Commission

Calculate Sales Manager Commission

Calculate Vendor Commission

Post

More options

🔍

📄

🔍

🔄

Line No. 1	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
70000	Sales Manager	JO	Jim Olive	Invoice	ASM-PSS10...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
80000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
90000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
100000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
110000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
120000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
130000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
140000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM

Base Amount

Profit Amount

Commission Amount

3,302.20

1,218.00

208.20

Commission Register

Commission Documents Entries

Commission Entries

Update Payment Info

Void

Remittance Report

More options

Entry No.	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Di
5	9/4/2024 9:58 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024				
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		

iii. Update Payment Information.

App launcher Commission Register

Commission Documents Entries Commission Entries **Update Payment Info** Void Remittance Report More options

Entry No. 4	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Du
5	9/4/2024 9:58 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Posted		
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		

Commission Register

Commission Documents Entries Commission Entries Update Payment Info **Void** Remittance Report More options

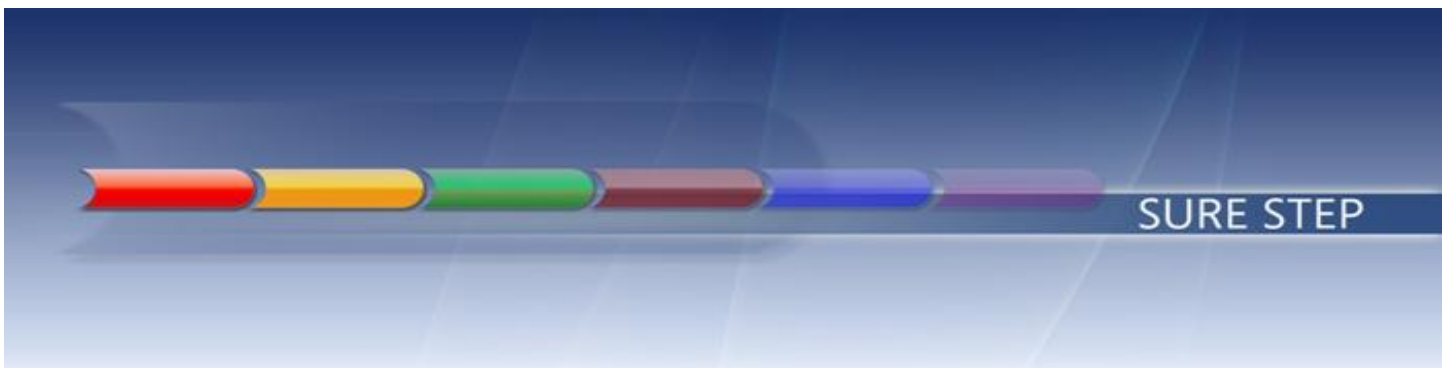
Entry No. 4	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Du
5	9/4/2024 9:58 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Paid		9
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Posted		
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		

iv. Generate Remittance Report.

Commission Register

Commission Documents Entries Commission Entries Update Payment Info Void **Remittance Report** More options

Entry No. 4	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Du
5	9/4/2024 9:58 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Paid		9
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Posted		
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		



Acumens Flexible Commissions R1-Usage Scenarios Documentation.

Versions Supported:
Dynamics BC 24

Prepared & developed by
SBC Dynamics ERP

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	August 2024		Document Prepared

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4 Application Overview

Acumens Flexible Commissions R1 redefines how you manage sales compensation with a sophisticated and adaptable solution. This app integrates seamlessly with your General Ledger and Accounts Payable systems to ensure precise and efficient commission management. It's perfectly suited for W2 Employees, 1099 Vendors, and referral partners.

Key Features:

- **Versatile Commission Management:** Efficiently handle commissions for various recipient types, including W2 Employees and 1099 Vendors, and reward Sales Managers based on team performance.
- **Customizable Commission Configuration:** Set commission rates by Salesperson, State, Location Code, and Item/Resource/Fixed Asset/G/L Account. Choose between percentage rates or fixed amounts per quantity.
- **Flexible Calculation Methods:** Calculate commissions based on Sales, Gross Profit, or Per Quantity, tailored to your sales strategy.
- **Efficient Payment Processing:** Disburse commissions only when Sales Invoices are fully paid and track all commissions as accounts payable entries.
- **Advanced Tracking and Splitting:** Allocate commissions between multiple Salespersons and referral Vendors and access detailed transaction records through a comprehensive commission ledger.

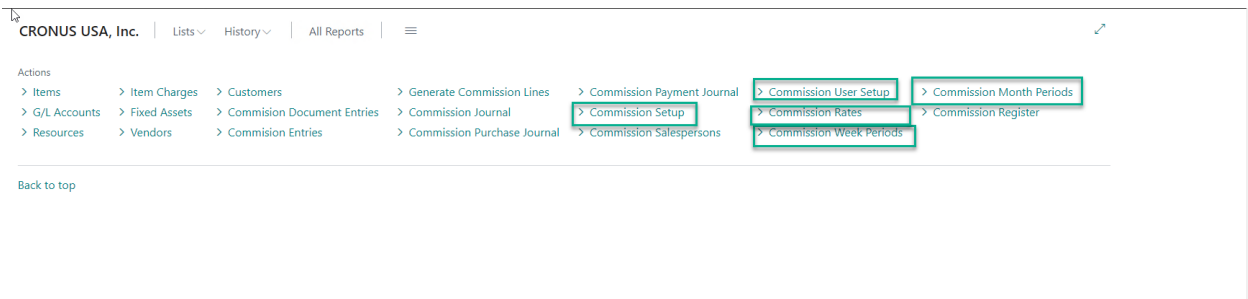
2 System Requirements

Acumens Flexible Commissions R1 is an extension for BC365 supports all BC365 deployment scenarios and imposes no additional requirements nor restrictions on the standard system requirements for BC365.

Acumens Flexible Commissions R1 requires Microsoft Dynamics 365 Business Central version 14.00 or later and works with all BC365 clients (Dynamics NAV Web Client, Dynamics NAV Tablet Client, Dynamics NAV Phone Client (in a Browser) and Dynamics NAV Universal App)

5 Setups

Acumens Flexible Commissions R1 has five main setups.



5.1 Commission Rates

Commission Rate can be defined per Salesperson Code, State, Location Code and Item/Resource/GL Account/Item Charge.

The screenshot shows the 'Commission Rates' setup screen. It features a table with columns for Salesperson Code, State, Location Code, Type, Salesperson 1 Commission Method, Salesperson 1 Base Amount %, Salesperson 1 Commission %, Salesperson 1 Commission Amount, Salesperson 2 Commission Method, Salesperson 2 Base Amount %, Salesperson 2 Commission %, Salesperson 2 Commission Amount, Manager Base Amount %, Manager Commission Method, Manager Commission %, and Manager Commission Amount. The table contains data for various salesperson codes and states, with commission rates defined for different types of accounts and items.

Salesperson Code	State	Location Code	Type	Salesperson 1 Commission Method	Salesperson 1 Base Amount %	Salesperson 1 Commission %	Salesperson 1 Commission Amount	Salesperson 2 Commission Method	Salesperson 2 Base Amount %	Salesperson 2 Commission %	Salesperson 2 Commission Amount	Manager Base Amount %	Manager Commission Method	Manager Commission %	Manager Commission Amount
			G/L Account	Percentage	100.00	30.00		Percentage	100.00	30.00		100.00	Percentage	3.00	
			Item	Percentage	100.00	30.00		Percentage	100.00	30.00		100.00	Percentage	3.00	
			Resource	Percentage	100.00	20.00		Percentage	100.00	20.00		100.00	Percentage	2.00	
			Fixed Asset	Percentage	100.00	40.00		Percentage	100.00	40.00		100.00	Percentage	4.00	

5.2 Commission user setup

Commission user setup implements security filters for to limit users to view Commission Document Entries and Commission Entries. User can access records based on their role. It can be Administrator, Sales person or Sales Person manager Role.

The screenshot shows the 'Commission User Setup' screen. It features a table with columns for User ID #, Salesperson/Purch. Code, Commission Role, Location Filter, Salesperson Code Filter, Department Filter, Customer/Group Filter, State Filter, Commission Purchase Jnl Template Name, Commission Purchase Jnl Batch Name, Commission Payment Journal Template Name, and Commission Payment Journal Batch Name. The table contains data for three users: DEVELOPER, DONSAITO, and GIDEON, with their respective roles and filters.

User ID #	Salesperson/Purch. Code	Commission Role	Location Filter	Salesperson Code Filter	Department Filter	Customer/Group Filter	State Filter	Commission Purchase Jnl Template Name	Commission Purchase Jnl Batch Name	Commission Payment Journal Template Name	Commission Payment Journal Batch Name
DEVELOPER		Admin						PURCHASES	DEFAULT	PAYMENT	DEFAULT
DONSAITO		Salesperson									
GIDEON		Salesperson									

5.3 Commission Setup

This is the main setup where you configure the basic parameters for commission calculation. You can define rules such as commissionable entities, calculation methods, and other general settings

App launcher

Acumens Commission R1 Setup

Old Invoice & Cred... Non-Commissionable Salespersons User Setup More options

General

Enable Commissions R1 ☒

Item Commissionable ☒

Resource Commissionable ☒

G/L Account Commissionable ☒

Item Charge Commissionable ☒

Fixed Asset Commissionable ☒

Calculate Commission On

Minimum Gross Profit % for Commission

Prevent Negative Commission ☒

Start Invoice Date

Commission Expense G/L Account No.

Copy Commission Rate from Salesperson 1 to Sal... ☒

Commission Purchase Journal

Journal Template Name

Journal Batch Name

Commission Payment Journal

Journal Template Name

Journal Batch Name

Pay Commission On

Salesperson 1

Salesperson 2

Sales Manager

Venue Vendor

Caterer Vendor

Captions

Referral Vendor

Referral Vendor No Caption

Vendor 1 Split % Caption

Vendor 1 Commission % Caption

Referral Vendor 2

Referral Vendor No 2 Caption

Vendor 2 Split % Caption

Vendor 2 Commission % Caption

5.4 Commission Sales Persons

Commission sales person setup defines Commission rates and split between sales people.

Commission Salespersons

✓ Saved

Edit List

Code 1	Name	Not Commisi...	Salesperson 1 Split %	Salesperson 2 Split %	Payee Type	Payee Code	Location Code	Commission Department Code	Commission Customergroup Code
→ BC	Benjamin Chiu	<input type="checkbox"/>	100.00	100.00	W2 Employee	10000			
CAROLINE		<input type="checkbox"/>	100.00	100.00	1099 Vendor	10000			
EH	Ester Henderson	<input type="checkbox"/>	100.00	100.00	W2 Employee	10000			
HR	Helena Ray	<input type="checkbox"/>	100.00	100.00	W2 Employee				
JO	Jim Olive	<input type="checkbox"/>	100.00	100.00	W2 Employee				
LT	Lina Townsend	<input type="checkbox"/>	100.00	100.00	W2 Employee				
MD	John Smith	<input type="checkbox"/>	100.00	100.00	W2 Employee				
OF	Otis Falls	<input type="checkbox"/>	100.00	100.00	W2 Employee				
RB	Robin Bettencourt	<input type="checkbox"/>	100.00	100.00	W2 Employee				

5.5 Periods

5.5.1 Generate Monthly Periods

Commission Month Period

✓ Saved

Manage Create Periods More options

Ending Date 1	Name	Period Type	Closed
→ 9/30/2024	2024 September	Monthly	<input type="checkbox"/>
10/31/2024	2024 October	Monthly	<input type="checkbox"/>

5.5.2 Generate Weekly Periods

Commission Week Periods

Manage Create weekly Periods More options

End Date ↑	Period Type ↑	Closed	Name
9/26/2024	1 Week	<input type="checkbox"/>	2024 Week 35
9/8/2024	1 Week	<input type="checkbox"/>	2024 Week 36
9/15/2024	1 Week	<input type="checkbox"/>	2024 Week 37
9/22/2024	1 Week	<input type="checkbox"/>	2024 Week 38
9/29/2024	1 Week	<input type="checkbox"/>	2024 Week 39
10/6/2024	1 Week	<input type="checkbox"/>	2024 Week 40
10/13/2024	1 Week	<input type="checkbox"/>	2024 Week 41
10/20/2024	1 Week	<input type="checkbox"/>	2024 Week 42
10/27/2024	1 Week	<input type="checkbox"/>	2024 Week 43

6 Usage

6.1 Role Center

User Setup has Commission Role which can be

- d) SalespersonIt is used for individual Salesperson.
- e) Sales ManagerIt is used for Sales Manager who is assigned team of Salesperson.
- f) AdminIt is used for System Administrator or Commission Administrator.

CRONUS USA, Inc.

Lists History All Reports

Actions

> Items

> Item Charges

> Customers

> Generate Commission Lines

> Commission Payment Journal

> Commission User Setup

> Commission Month Periods

> G/L Accounts

> Fixed Assets

> Commission Document Entries

> Commission Journal

> Commission Setup

> Commission Rates

> Commission Register

> Resources

> Vendors

> Commission Entries

> Commission Purchase Journal

> Commission Salespersons

> Commission Week Periods

Back to top

6.2 Commission Entries.

Commission Entries are generated from posted invoices.

Commission Entries

Navigate More options

Commission Type	Commission Code	Document Type	Document No.	Document Line No.	Document Posting Date	State	Sell-to Customer No.	Sell-to Customer Name	Bill-to Customer No.	Bill-to Customer Name	Type	No.	Description
Salesperson 1	BC	Invoice	PS-INV103280	10000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl
Salesperson 1	BC	Invoice	PS-INV103280	20000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Resource	KATHERINE	KATHE
Salesperson 1	BC	Invoice	PS-INV103281	10000	9/2/2024		20000	Trey Research	20000	Trey Research	Item	1000	Bicycl
Salesperson 2	BC	Invoice	PS-INV103281	10000	9/2/2024		20000	Trey Research	20000	Trey Research	Item	1000	Bicycl
Venue Vendor	20000	Invoice	PS-INV103280	10000	9/2/2024	IL	10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl
Venue Vendor	20000	Invoice	PS-INV103280	20000	9/2/2024	IL	10000	Adatum Corporation	10000	Adatum Corporation	Resource	KATHERINE	KATHE
Venue Vendor	20000	Invoice	PS-INV103281	10000	9/2/2024	IL	20000	Trey Research	20000	Trey Research	Item	1000	Bicycl
Caterer Vendor	20000	Invoice	PS-INV103280	10000	9/2/2024	IL	10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl
Caterer Vendor	20000	Invoice	PS-INV103280	20000	9/2/2024	IL	10000	Adatum Corporation	10000	Adatum Corporation	Resource	KATHERINE	KATHE
Caterer Vendor	20000	Invoice	PS-INV103281	10000	9/2/2024	IL	20000	Trey Research	20000	Trey Research	Item	1000	Bicycl
Salesperson 1	HR	Invoice	ASM-PS51000...	10000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	SB10000003	HP La
Salesperson 1	HR	Invoice	ASM-PS51000...	20000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Resource	TERRY	After :
Salesperson 1	HR	Invoice	ASM-PS51000...	30000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	1155	After :
Salesperson 1	HR	Invoice	ASM-PS51000...	40000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Resource	LINA	After :
Salesperson 1	HR	Invoice	PS-INV103278	10000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl
Salesperson 1	HR	Invoice	PS-INV103278	20000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Resource	KATHERINE	KATHE
Salesperson 1	HR	Invoice	PS-INV103279	10000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl
Salesperson 1	HR	Invoice	PS-INV103279	20000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Resource	KATHERINE	KATHE
Salesperson 1	BC	Invoice	PS-INV103282	10000	9/2/2024		10000	Adatum Corporation	10000	Adatum Corporation	Item	1000	Bicycl

6.3 Commission Document Entries.

Commission Document Entries are generated as below, from the posted sales Invoices.

Commission Document Entries												
<div>Do Not Pay Commission</div> <div>Navigate</div> <div>More options</div>												
Commission Type	Commission Code	Salesperson Code	Sell-to Customer No.	Document Type	Document No.	Document Posting Date	Sell-to Customer Name	Bill-to Customer Name	Description	Location Code	Department Code	Customer Code
Salesperson 2	BC	BC	20000	Invoice	PS-INV103281	9/2/2024	Trey Research		Order S-ORD101126	MAIN	SALES	M
Salesperson 1	BC	BC	10000	Invoice	PS-INV103282	9/2/2024	Adatum Corporation		Order S-ORD101128	MAIN	SALES	SH
Salesperson 1	BC	BC	10000	Invoice	PS-INV103283	9/2/2024	Adatum Corporation		Order S-ORD101129	MAIN	SALES	SH
Salesperson 2	BC	CAROLINE	20000	Invoice	PS-INV103284	9/2/2024	Trey Research		Order S-ORD101130	MAIN	SALES	M
Salesperson 2	CAROLINE	BC	10000	Invoice	PS-INV103280	9/2/2024	Adatum Corporation		Order S-ORD101125	MAIN	SALES	SH
Salesperson 2	CAROLINE	BC	10000	Invoice	PS-INV103282	9/2/2024	Adatum Corporation		Order S-ORD101128	MAIN	SALES	SH
Salesperson 2	CAROLINE	BC	10000	Invoice	PS-INV103283	9/2/2024	Adatum Corporation		Order S-ORD101129	MAIN	SALES	SH
Salesperson 1	CAROLINE	CAROLINE	20000	Invoice	PS-INV103284	9/2/2024	Trey Research		Order S-ORD101130	MAIN	SALES	M
Salesperson 1	HR	HR	10000	Invoice	ASM-PSI000...	9/2/2024	Adatum Corporation		Order ASM-S000026	MAIN	SALES	SH
Salesperson 1	HR	HR	10000	Invoice	PS-INV103278	9/2/2024	Adatum Corporation		Order S-ORD101123	MAIN	SALES	SH
Salesperson 1	HR	HR	10000	Invoice	PS-INV103279	9/2/2024	Adatum Corporation		Order S-ORD101124	MAIN	SALES	SH
Sales Manager	JO	HR	10000	Invoice	ASM-PSI000...	9/2/2024	Adatum Corporation		Order ASM-S000026	MAIN	SALES	SH
Sales Manager	JO	HR	10000	Invoice	PS-INV103278	9/2/2024	Adatum Corporation		Order S-ORD101123	MAIN	SALES	SH
Sales Manager	JO	HR	10000	Invoice	PS-INV103279	9/2/2024	Adatum Corporation		Order S-ORD101124	MAIN	SALES	SH
Sales Manager	JO	BC	10000	Invoice	PS-INV103280	9/2/2024	Adatum Corporation		Order S-ORD101125	MAIN	SALES	SH
Sales Manager	JO	BC	20000	Invoice	PS-INV103281	9/2/2024	Trey Research		Order S-ORD101126	MAIN	SALES	M
Sales Manager	JO	BC	10000	Invoice	PS-INV103282	9/2/2024	Adatum Corporation		Order S-ORD101128	MAIN	SALES	SH
Sales Manager	JO	BC	10000	Invoice	PS-INV103283	9/2/2024	Adatum Corporation		Order S-ORD101129	MAIN	SALES	SH
Sales Manager	JO	CAROLINE	20000	Invoice	PS-INV103284	9/2/2024	Trey Research		Order S-ORD101130	MAIN	SALES	M

6.4 Commission Journal.

Commission Journal is used to calculate commission for Salespersons, Sales Manager and Vendor referral and review or post it for further processing.

With Commission journal you can.

vi. Generate Sales Person Commission Using Month Periods.

Commission Journal												
<div>User ID: DEVELOPER</div> <div>ManageShow DocumentCalculate Salesperson CommissionCalculate Sales Manager CommissionCalculate Vendor CommissionPostMore options</div>												
Line No.	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customer Code
10000	Salesperson 1	BC	Benjamin Chiu	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
20000	Salesperson 1	BC	Benjamin Chiu	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
30000	Salesperson 1	BC	Benjamin Chiu	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
40000	Salesperson 1	BC	Benjamin Chiu	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
50000	Salesperson 2	BC	Benjamin Chiu	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
60000	Salesperson 2	BC	Benjamin Chiu	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
70000	Salesperson 1	CAROLINE		Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
80000	Salesperson 2	CAROLINE		Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
90000	Salesperson 1	HR	Helena Ray	Invoice	ASM-PSI00...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
100000	Salesperson 1	HR	Helena Ray	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
110000	Salesperson 1	HR	Helena Ray	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
<div>Base Amount1,947.80Profit Amount531.70Commission Amount468.66</div>												

vii. Generate Sales Manager Commission Using Custom Dates.

Commission Journal												
User ID: DEVELOPER												
Manage Show Document Calculate Salesperson Commission Calculate Sales Manager Commission Calculate Vendor Commission Post More options												
Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
Base Amount				Profit Amount				Commission Amount				
1,702.40				859.60				170.24				

viii. Generate Vendor Commission Using Custom Dates.

Commission Journal												
User ID: DEVELOPER												
Manage Show Document Calculate Salesperson Commission Calculate Sales Manager Commission Calculate Vendor Commission Post More options												
Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
70000	Sales Manager	JO	Jim Olive	Invoice	ASM-PSS10...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
80000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
90000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
100000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
110000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
120000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
130000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
140000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
Base Amount				Profit Amount				Commission Amount				
3,302.20				1,218.00				208.20				

ix. Show document on Commission Journal.

Commission Journal

✓ Saved

User ID: DEVELOPER

Manage

Show Document

Calculate Salesperson Commission

Calculate Sales Manager Commission

Calculate Vendor Commission

Post

More options

Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
70000	Sales Manager	JO	Jim Olive	Invoice	ASM-PS510...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
80000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
90000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
100000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
110000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
120000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
130000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
140000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM

Base Amount

Profit Amount

Commission Amount

3,302.20

1,218.00

208.20

Commission Journal

✓ Saved

User ID: DEVELOPER

Manage

Show Document

Calculate Salesperson Commission

Calculate Sales Manager Commission

Calculate Vendor Commission

Post

More options

Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
70000	Sales Manager	JO	Jim Olive	Invoice	ASM-PS510...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
80000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
90000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
100000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
110000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
120000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
130000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
140000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM

Base Amount

Profit Amount

Commission Amount

3,302.20

1,218.00

208.20

Posted Sales Invoice - PS-INV103282 · Adatum Corporation

Manage

Home

Posting

Approve

Incoming Document

Order

Acumens eSalesTax

...

General

Show less

No.	PS-INV103282	Posting Date	9/2/2024
Customer	Adatum Corporation	Due Date	9/12/2024
Sell-to		Promised Pay Date	
Address	192 Market Square	Quote No.	
Address 2		Order No.	S-ORD101128
City	Atlanta	Pre-Assigned No.	
Sell-to State	GA	External Document No.	
ZIP Code	31772	Salesperson Code	BC
Country/Region	US	Responsibility Center	BIRMINGHAM
Contact No.	CT000001	No. Printed	1
Phone No.		Canceled	No
Mobile Phone No.	0808001233345	Corrective	No
Email	ivan@sbdynamicserp.com	Closed	<input checked="" type="checkbox"/>
Contact		Dispute Status	
Your Reference		Work Description	

Close

x. **Post Commission Entries.**

App launcher Commission Journal

User ID: DEVELOPER

Manage Show Document Calculate Salesperson Commission Calculate Sales Manager Commission Calculate Vendor Commission **Post** More options

Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
70000	Sales Manager	JO	Jim Olive	Invoice	ASM-PS510...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
80000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
90000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
100000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
110000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
120000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
130000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
140000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
				Base Amount		Profit Amount		Commission Amount				
				3,302.20		1,218.00		208.20				

6.5 Commission Register.

Commission Register shows posted Commission from Commission. It can be already paid or is ready to post AP Payable and then make payments.

Commission Register

Commission Documents Entries Commission Entries Update Payment Info Void Remittance Report More options

Entry No. ↓	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Di
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		

v. On the Commission Register you can void Entries.

Commission Register

Commission Documents Entries Commission Entries Update Payment Info **Void** Remittance Report More options

Entry No. ↓	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Di
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		

Commission Journal

✓ Saved

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User ID: DEVELOPER

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📄

🔍

Manage

📄

Show Document

📄

Calculate Salesperson Commission

📄

Calculate Sales Manager Commission

📄

Calculate Vendor Commission

📄

Post

More options

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Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
70000	Sales Manager	JO	Jim Olive	Invoice	ASM-PSS10...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
80000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
90000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
100000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
110000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
120000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
130000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
140000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM

Base Amount

Profit Amount

Commission Amount

3,302.20

1,218.00

208.20

vi. Voided entries are available again on the Commission Journal and can be reposted.

Commission Journal

✓ Saved

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User ID: DEVELOPER

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Manage

Show Document

Calculate Salesperson Commission

Calculate Sales Manager Commission

Calculate Vendor Commission

Post

More options

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Line No. ↑	Commission Type	Commission Code	Name	Document Type	Document No.	Customer No.	Customer Name	State	Location Code	Location Name	Department Code	Customergro... Code
→ 10000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
20000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
30000	Venue Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
40000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
50000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	10000	Adatum Corporation	IL	MAIN	Main Warehouse	SALES	SMALL
60000	Caterer Vendor	20000	First Up Consultants	Invoice	PS-INV103...	20000	Trey Research	IL	MAIN	Main Warehouse	SALES	MEDIUM
70000	Sales Manager	JO	Jim Olive	Invoice	ASM-PSS10...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
80000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
90000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
100000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
110000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM
120000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
130000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	10000	Adatum Corporation		MAIN	Main Warehouse	SALES	SMALL
140000	Sales Manager	JO	Jim Olive	Invoice	PS-INV103...	20000	Trey Research		MAIN	Main Warehouse	SALES	MEDIUM

Base Amount

Profit Amount

Commission Amount

3,302.20

1,218.00

208.20

Commission Register

Commission Documents Entries

Commission Entries

Update Payment Info

Void

Remittance Report

More options

Entry No.	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Di
5	9/4/2024 9:58 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024				
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		

vii. Update Payment Information.

App launcher Commission Register

Commission Documents Entries Commission Entries **Update Payment Info** Void Remittance Report More options

Entry No.	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Di
5	9/4/2024 9:58 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Posted		
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		

Commission Register

Commission Documents Entries Commission Entries Update Payment Info **Void** Remittance Report More options

Entry No.	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Di
5	9/4/2024 9:58 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Paid		9
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Posted		
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		

viii. Generate Remittance Report.

Commission Register

Commission Documents Entries Commission Entries Update Payment Info Void **Remittance Report** More options

Entry No.	Creation DateTime	Payee Type	Commission Type	Commission Code	Location Code	Department Code	Customergro... Code	State	Document Type	Document No.	Start Date	End Date	Batch Name	Status	Vol...	Pa Di
5	9/4/2024 9:58 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Paid		9
4	9/4/2024 7:01 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Posted		
3	9/4/2024 7:01 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		
2	9/3/2024 8:13 AM	1099 Vendor									9/1/2024	9/30/2024	DEVELOPER	Approved		
1	9/3/2024 7:35 AM	W2 Employ...									9/1/2024	9/30/2024	DEVELOPER	Posted		

Sample Remittance Report:

Commission Remittance Report				9/4/2024 10:21 AM	Page 1 / 1
20000 - First Up Consultants Evan McIntosh 100 Day Drive Chicago, IL 61236 USA				CRONUS USA, Inc. 7122 South Ashford Street Westminster Atlanta, GA 31772	
The following is a list of invoices paid included in your commission statement for the period from 09/01/24 to 09/30/24. Enclosed is check # PAAYSEP2024					
Type	Document No.	Customer No.	Customer Name	Invoice Amount	Commission Amount
Invoice	PS-INV103282	10000	Adatum Corporation	542.00	54.20
Invoice	PS-INV103282	10000	Adatum Corporation	542.00	54.20
Invoice	PS-INV103283	10000	Adatum Corporation	231.60	23.16
Invoice	PS-INV103283	10000	Adatum Corporation	231.60	23.16
Invoice	PS-INV103284	20000	Trey Research	77.60	7.76
Invoice	PS-INV103284	20000	Trey Research	77.60	7.76
Invoice	ASM-PSSI00009	10000	Adatum Corporation	92.60	0.45
Invoice	PS-INV103278	10000	Adatum Corporation	192.80	4.24
Invoice	PS-INV103279	10000	Adatum Corporation	192.80	4.24
Invoice	PS-INV103280	10000	Adatum Corporation	231.60	5.41
Invoice	PS-INV103281	20000	Trey Research	38.80	1.16
Invoice	PS-INV103282	10000	Adatum Corporation	542.00	14.72
Invoice	PS-INV103283	10000	Adatum Corporation	231.60	5.41
Invoice	PS-INV103284	20000	Trey Research	77.60	2.33
Total For Check # PAAYSEP2024				3,302.20	208.20

6.6 Commission Purchase Journal

Commission Purchase Journal is used to create Commission Payable for only 1099 Vendor.

Entries populated via **Get Commission Lines** menu action.

Commission Purchase Journals

Batch Name: DEFAULT

Manage Home Page Post/Print Line Account More options

Get Commission Lines Apply Entries...

Posting Date	Document Type	Document No.	External Document No.	Account Type	Account No.	Vendor Name	Description	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Post
9/4/2024	Invoice	G00001	G00001	Vendor	10000	Fabrikam, Inc.	Commission For Period: 09/01/24-09/30/24			

Dimensions

Dimension Code	Value Code	Dimension Val.
AREA	20	America Nor
BUSINESSGR...	INDUSTRIAL	Industrial
SALESCAMPA...	SUMMER	Summer

Incoming Document Files

Name	Type
(There is nothing to show in this view)	

Account Name	Bal. Account Name	Balance	Total Balance
Fabrikam, Inc.	Petty Cash	0.00	0.00

Commission Payment Journal is used to

- Commission Payment Journals

Batch Name: DEFAULT

Manage Home Bank Prepare Post/Print Line Account Check More options

Suggest Commission Payments..

Posting Date	Document Date	Document Type	Document No.	External Document No.	Account Type	Account No.	Recipient Bank Account	Description	Currency Code	Payment Method Code	Payment Reference
→ 9/2/2024	9/2/2024	Payment	G04001		Vendor	10000		Fabrikam, Inc.		BANK	
								Fabrikam, Inc.		BANK	

Incoming Document Files

(There is nothing to show in this view)

Payment File Errors

Error Test
(There is nothing to show in this view)

OverdueWarningText

This posting date will cause an overdue payment.

Account Name	Bal. Account Name	Balance	Total Balance
Fabrikam, Inc.	World Wide Bank	0.00	0.00

6.8 Commission Purchase Journal

Commission Purchase Journal is used to create Commission Payable for only 1099 Vendor.

Entries populated via **Get Commission Lines** menu action.

← Commission Purchase Journals

✓ Saved [Icon] [Icon]

Batch Name DEFAULT ...

[Icon] ✓ [Icon] Manage Home Page Post/Print Line Account More options

[Icon] Get Commission Lines [Icon] Apply Entries... [Icon]

	Posting Date	Document Type	Document No.	External Document No.	Account Type	Account No.	Vendor Name	Description	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Pos.
→	9/4/2024	Invoice	G00001	G00001	Vendor	10000	Fabrikam, Inc.	Commission For Period : 09/01/24..09/30/24			

Dimensions ▾

Dimension Code ↑	Dimension Value Code	Dimension Val.
AREA	20	America Nor
BUSINESSGR...	INDUSTRIAL	Industrial
SALESCAMPA...	SUMMER	Summer

◀ ▶

Incoming Document Files ▾

Name	Type
(There is nothing to show in this view)	

◀ ▶

Account Name	Bal. Account Name	Balance	Total Balance
Fabrikam, Inc.	Petty Cash	0.00	0.00

Commission Payment Journal is used to

- f) Post payment for Commission to Salesperson, Sales Manager and Vendors account.

[illegible]