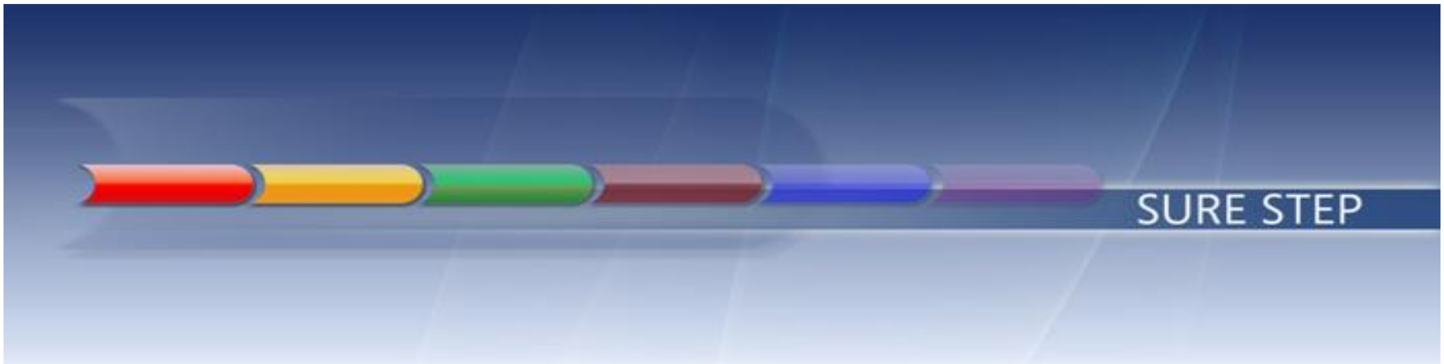


Acumens Flexible Commissions R2 Usage Scenarios Documentation

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

Table of Contents

1 Overview

Acumens Flexible Commissions R2 extension for Dynamics 365 Business Central (BC365) adds easy to use sales commission functionality for BC365. With it you can: -

- ✓ Process salespeople, specific, entity, margin, and/or custom commissions.
- ✓ Calculate commission when a dale is posted and log it.
- ✓ Depending on “commission payable on sale” setting, determine payable commission on sale or on collection.
- ✓ Reports to view and process payable commission (detailed) and summarized at salesperson level.
- ✓ Report to countercheck/verify commissions with verification hints.
- ✓ Batch process to expire open (unpaid) old commission entries.

2 System Requirements

Acumens Flexible Commissions R2 extension for BC365 supports all BC365 deployment scenarios and imposes no additional requirements nor restrictions on the standard system requirements for BC365.

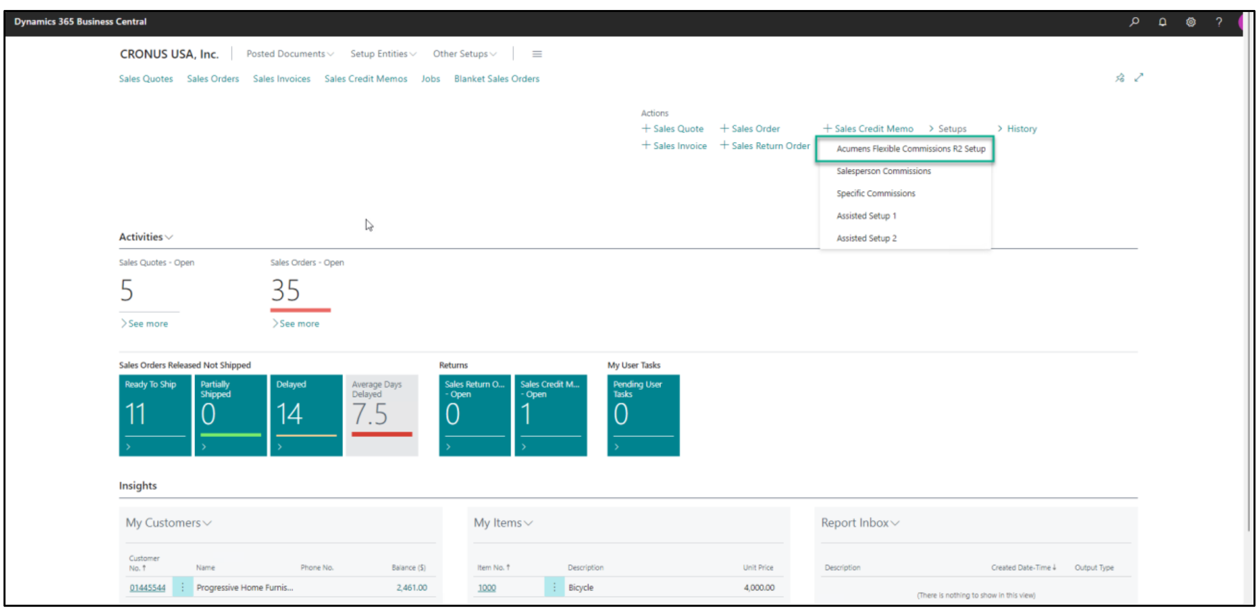
Acumens Flexible Commissions R2 requires Microsoft Dynamics 365 Business Central version 14.00 or later and works with all BC365 clients (Dynamics NAV Web Client, Dynamics NAV Tablet Client, Dynamics NAV Phone Client (in a Browser) and Dynamics NAV Universal App)

3 Usage

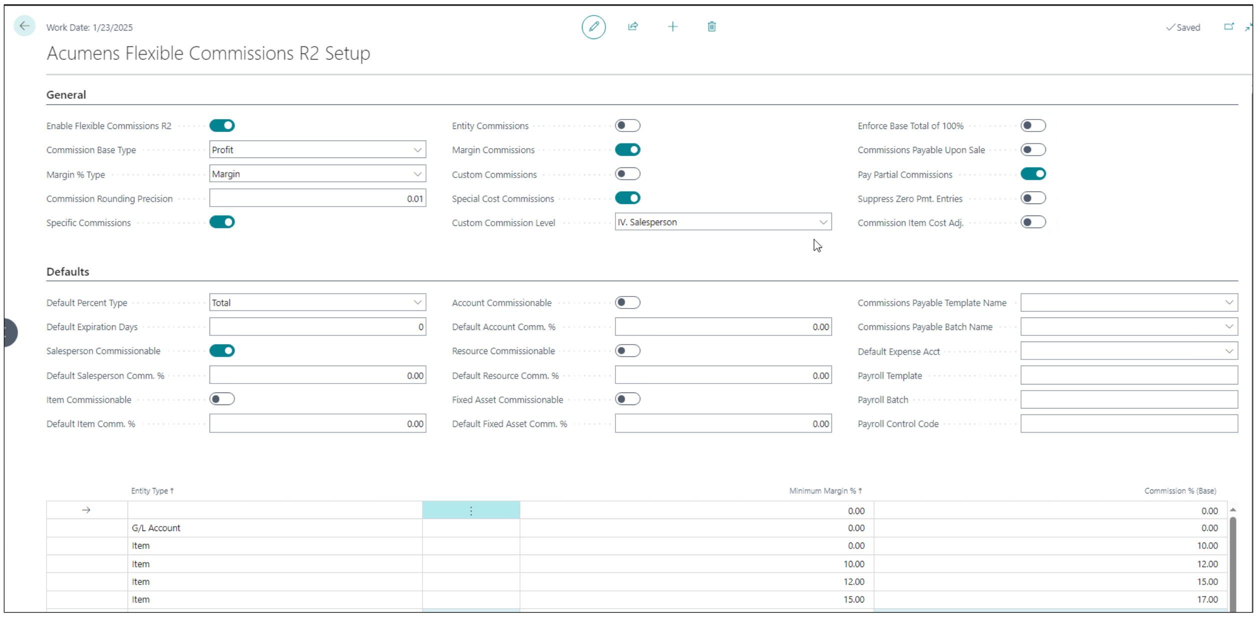
3.1 Setups

3.1.1 Flexible Commissions R2 Setup

On the Commissions profile, Select Setups **> Acumens Flexible Commission R2 Setup**

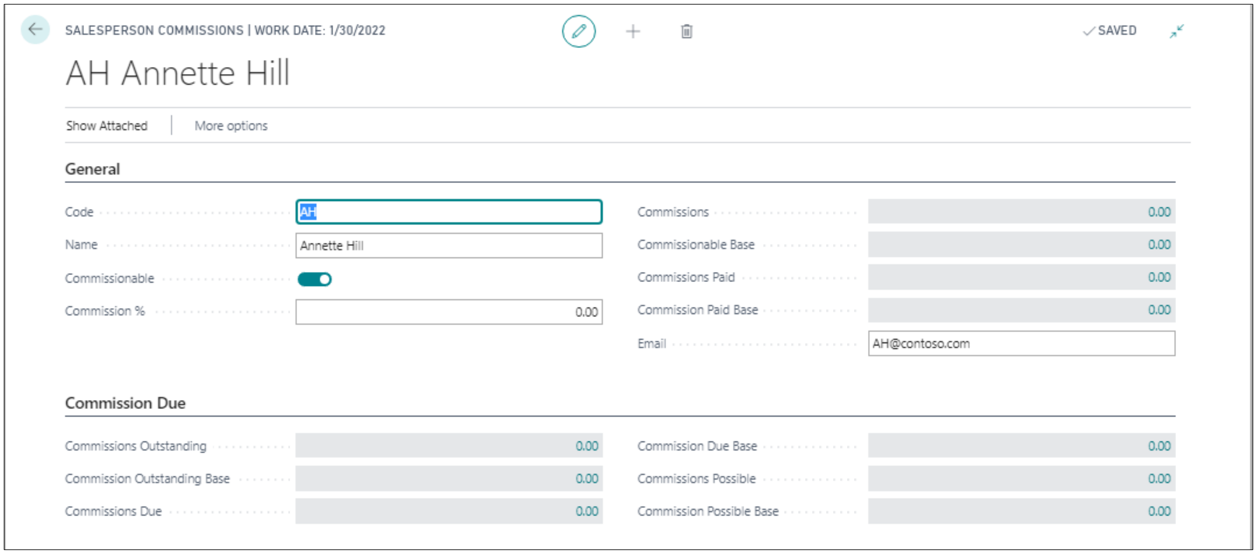


Flexible Commissions R2 Setup page opens.



3.1.2 Salesperson Commissions

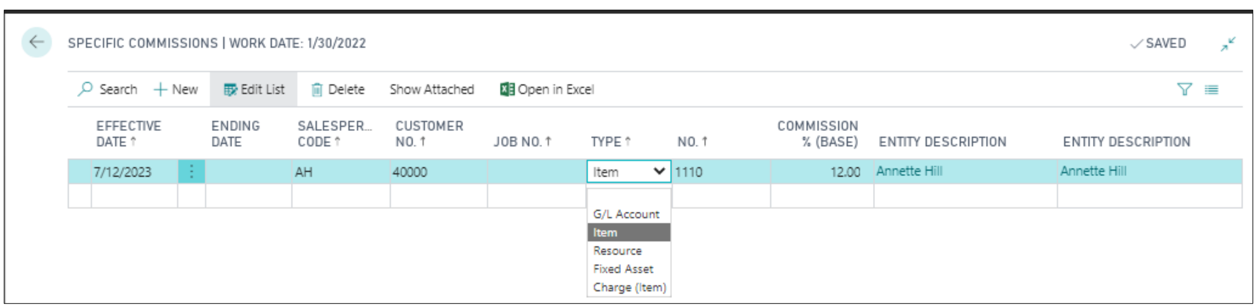
On the Commissions profile, click **Setups > Salesperson Commissions**



Flag commissionable salespeople and specify their commission rates.

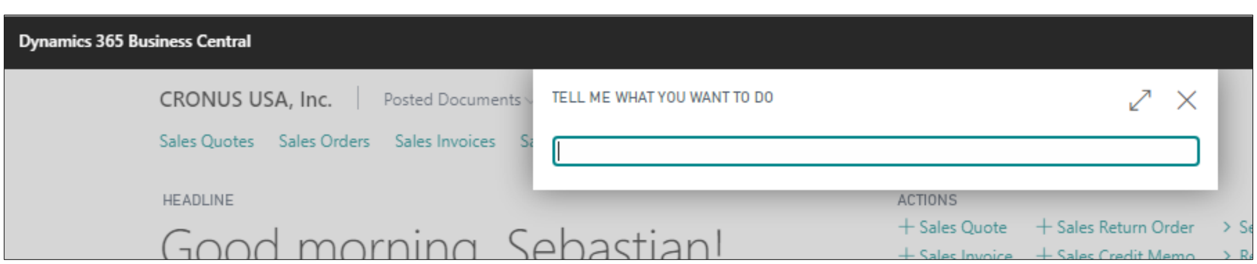
3.1.3 Specific Commissions

On the Commissions profile, click **Setups > Specific Commissions**



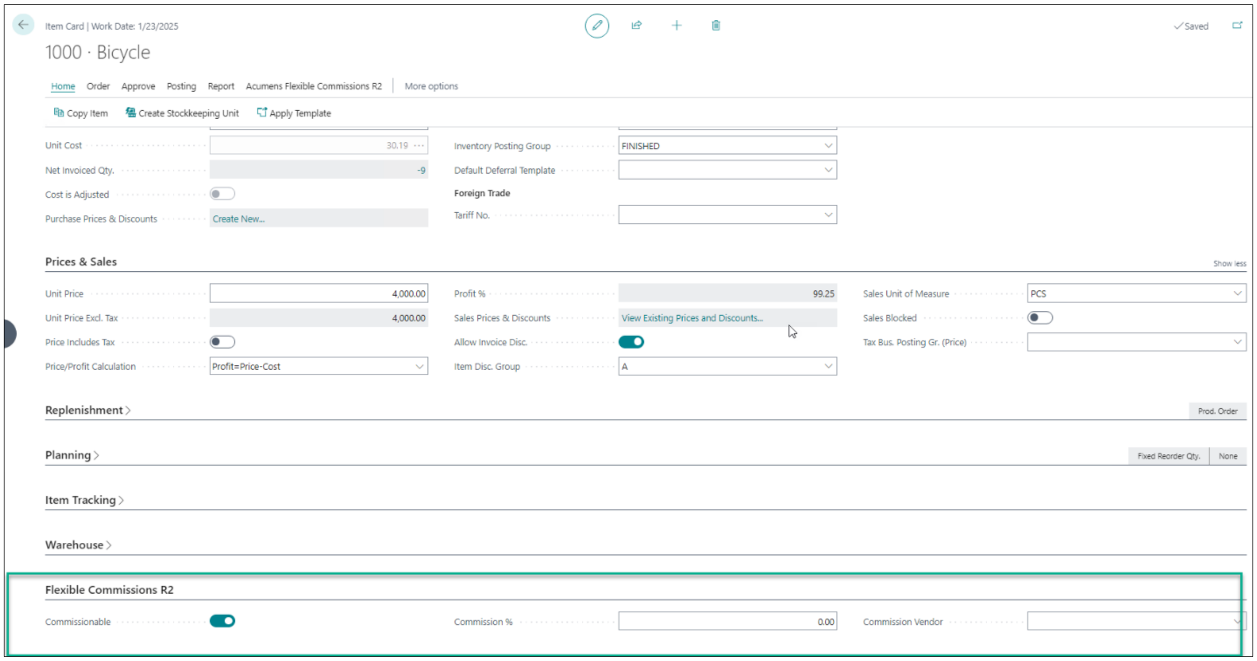
3.1.4 Entity Commissions

On the Commissions profile, on **TELL ME…**, search for the entity type whose commission rates you want to define.



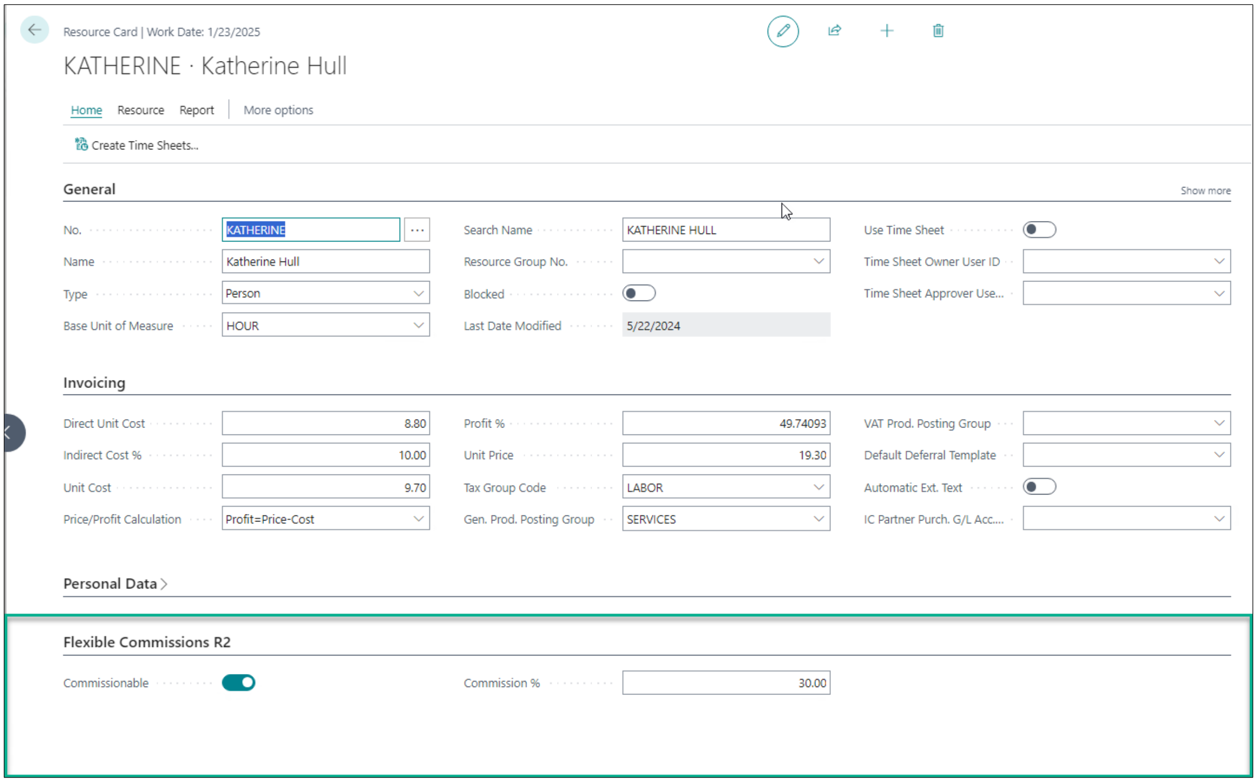
Entity Commissions are set up at item, resource, g/l account, and/or fixed asset level. For each entity, you indicate if the entity is commissionable or not and the commission rate:

For Items

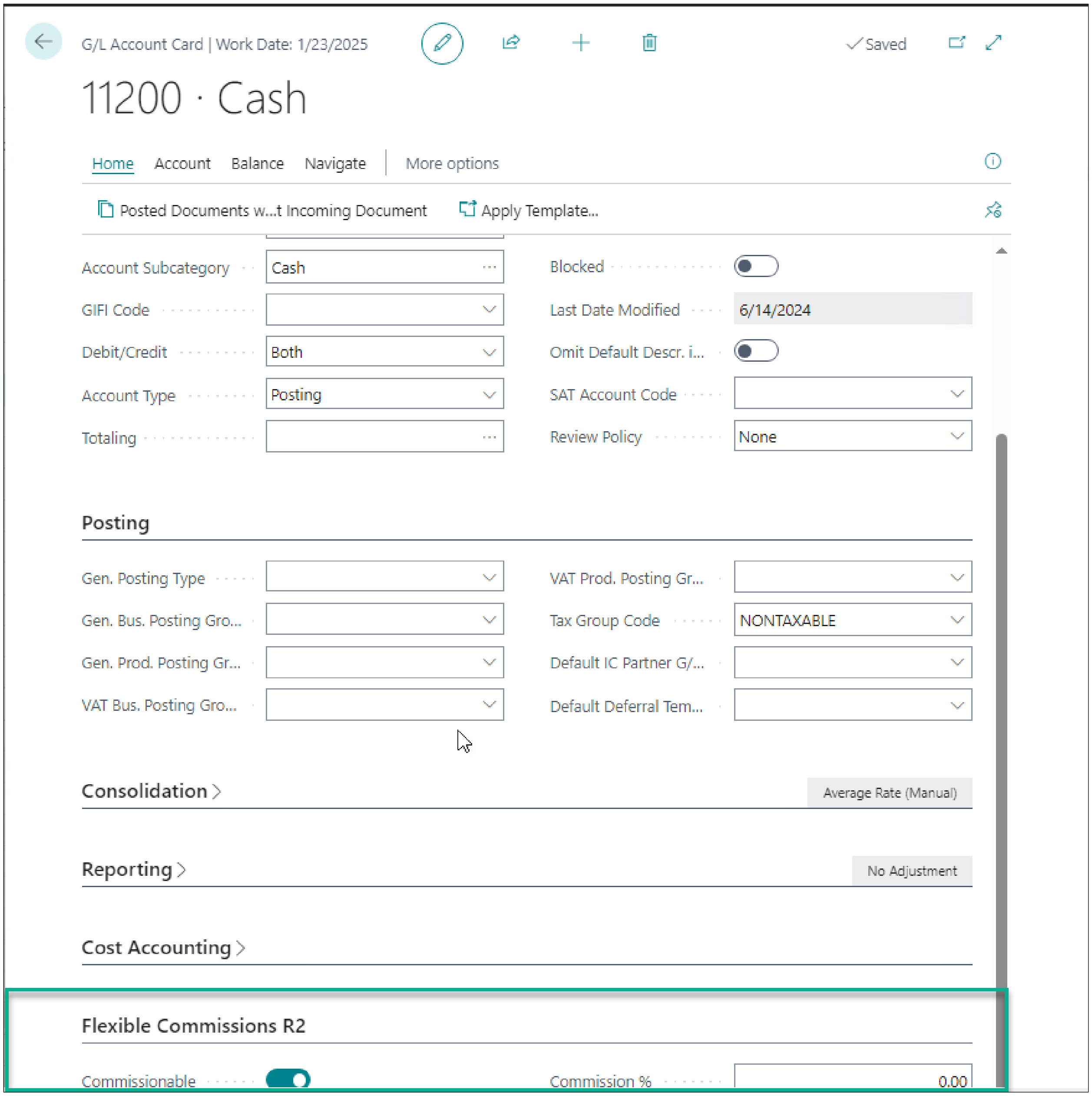


The commission vendor is used to get the direct purchase unit cost used to calculate commission.

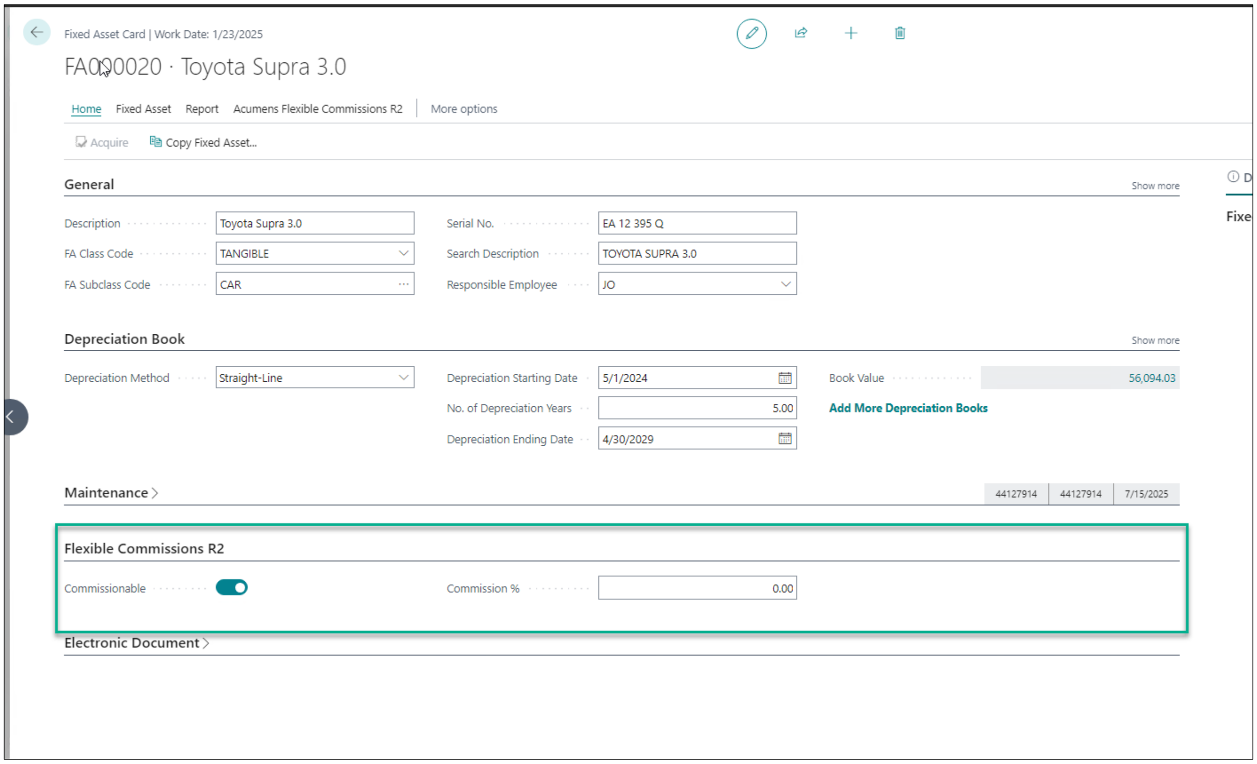
For Resources



For G/L Accounts

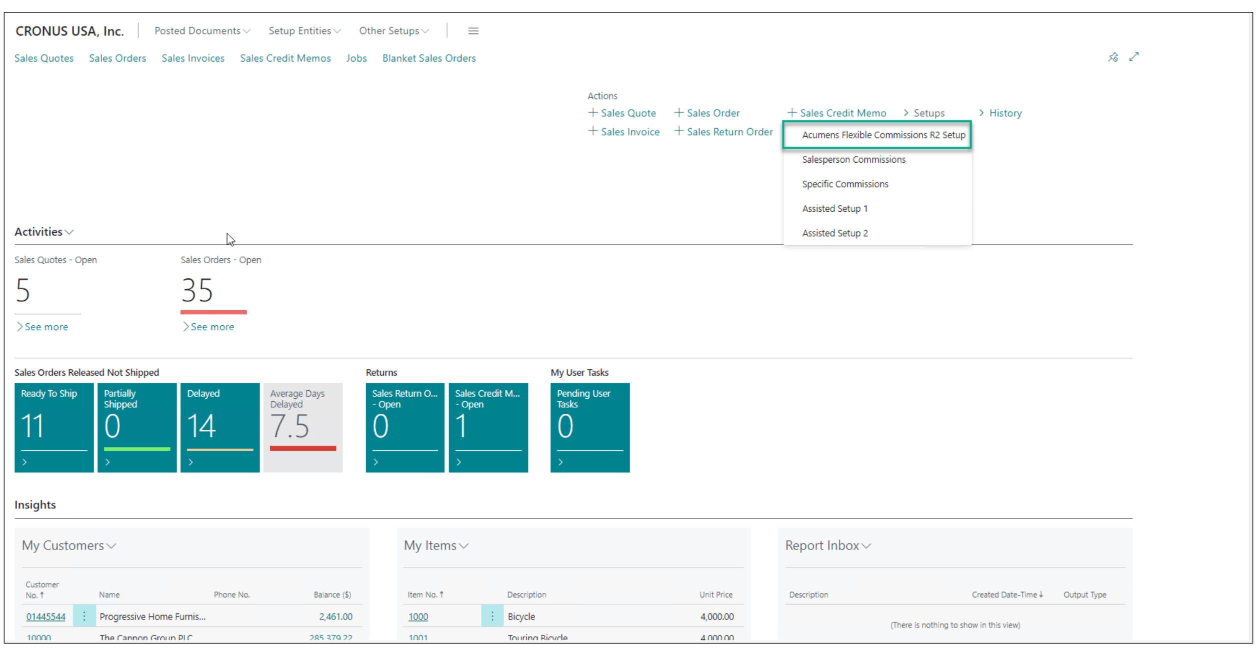

G/L Account Card | Work Date: 1/23/2025
Saved
11200 · Cash
Home
Account
Balance
Navigate
More options
Posted Documents w...t Incoming Document
Apply Template...
Account Subcategory
Cash
Blocked
GIFI Code
Last Date Modified
6/14/2024
Debit/Credit
Both
Omit Default Descr. i...
Account Type
Posting
SAT Account Code
Totaling
Review Policy
None
Posting
Gen. Posting Type
VAT Prod. Posting Gr...
Gen. Bus. Posting Gro...
Tax Group Code
NONTAXABLE
Gen. Prod. Posting Gr...
Default IC Partner G/...
VAT Bus. Posting Gro...
Default Deferral Tem...
Consolidation
Average Rate (Manual)
Reporting
No Adjustment
Cost Accounting
Flexible Commissions R2
Commissionable
Commission %
0.00

For Fixed Assets

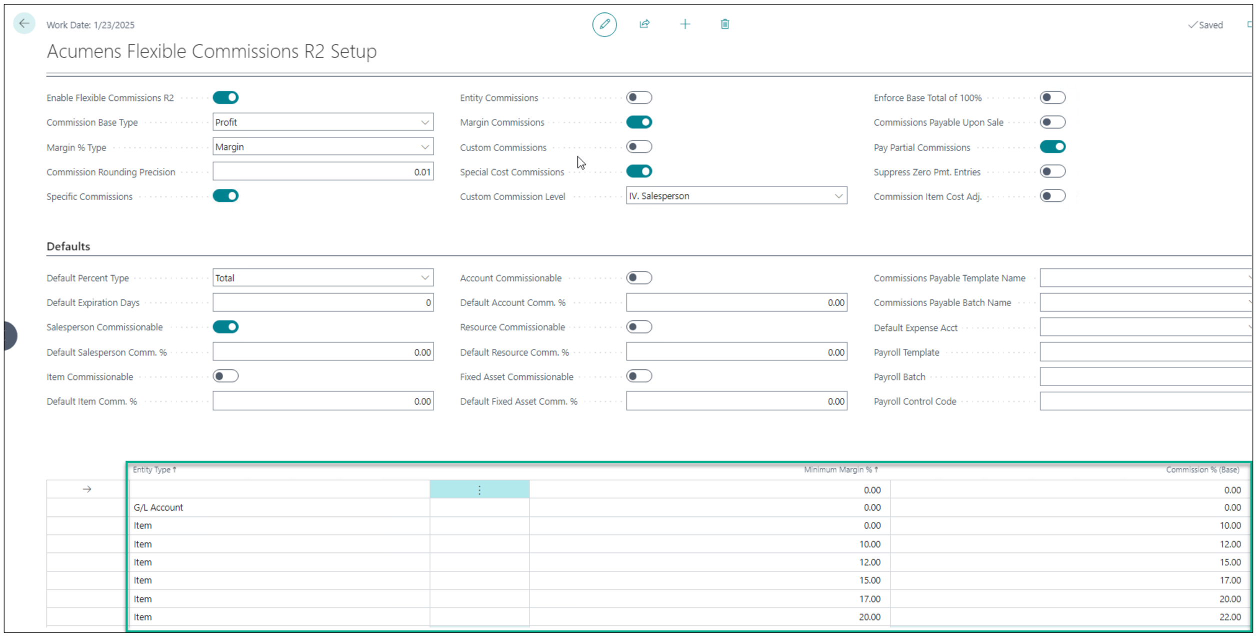


3.1.5 Margin Commissions

On the Commissions profile, click **Setups > Commission Setup**



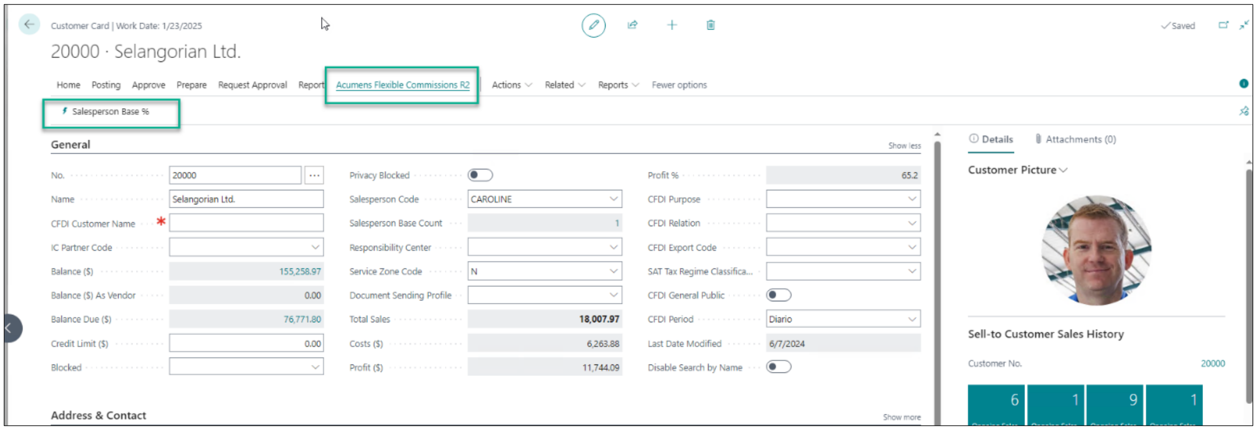
Margin commissions can be set up for a g/l account, item, resource, fixed asset, and/or a charge item. Margin Commissions can set up **tiered** as shown in the setup below.

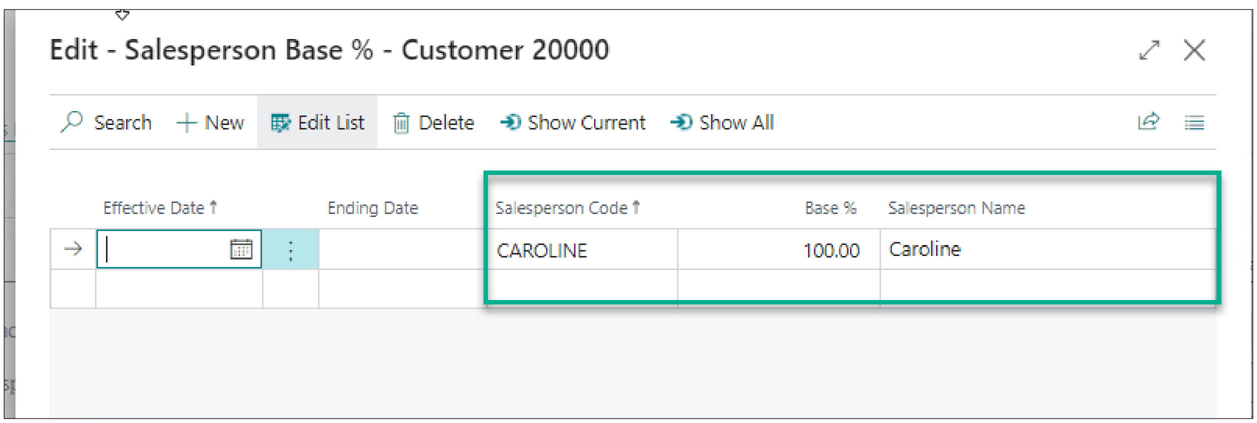


3.1.6 Salesperson Base % on Quotes and Orders

The Salesperson Base % can be set up on the Customer card. This allows order processing to be done with minimal manual intervention.

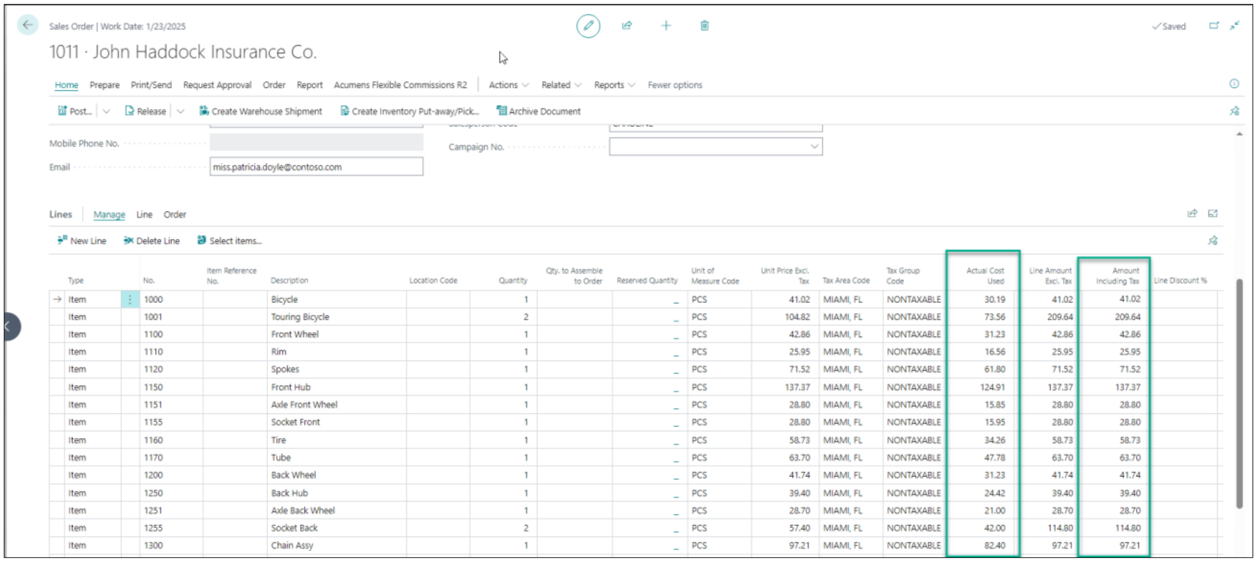
Salesperson Base % can be adjusted on the Sales Quote or Order Card.





3.2 The Sales Process and Commissions Generation

3.2.1 Non-Commissionable Entities



Sales Order | Work Date: 1/23/2025

1011 · John Haddock Insurance Co.

Home Prepare Print/Send Request Approval Order Report Acumens Flexible Commissions R2 Actions Related Reports Fewer options

Post... Release Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

Mobile Phone No.

Email: miss.patricia.doyle@contoso.com

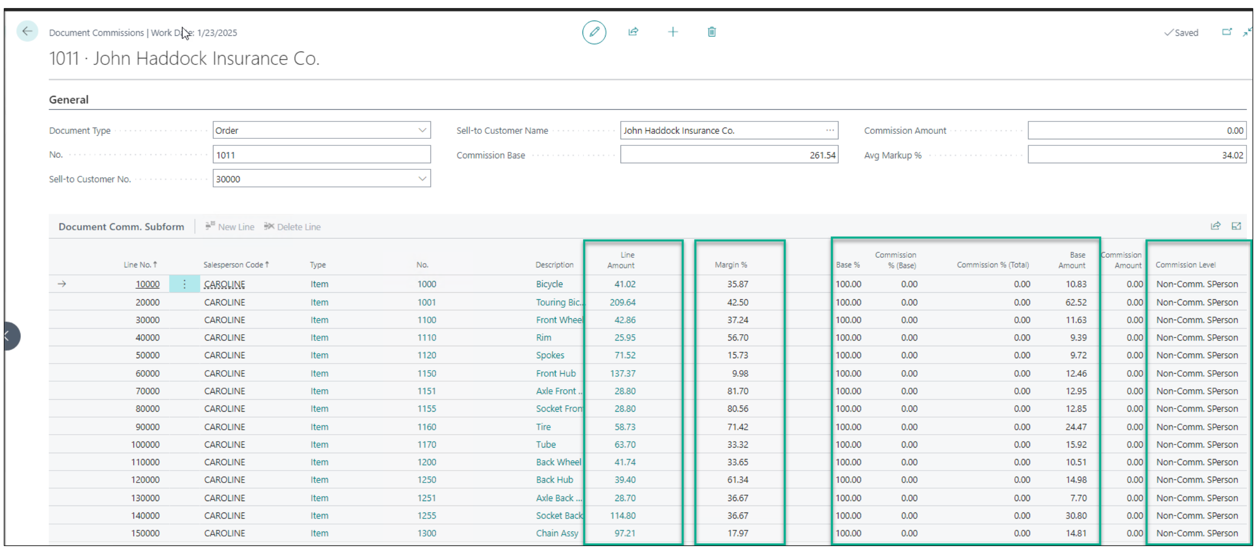
Campaign No.

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Actual Cost Used	Line Amount Excl. Tax	Amount Including Tax	Line Discount %
Item	1000		Bicycle		1		_	PCS	41.02	MIAMI, FL	NONTAXABLE	30.19	41.02	41.02	
Item	1001		Touring Bicycle		2		_	PCS	104.82	MIAMI, FL	NONTAXABLE	73.56	209.64	209.64	
Item	1100		Front Wheel		1		_	PCS	42.86	MIAMI, FL	NONTAXABLE	31.23	42.86	42.86	
Item	1110		Rim		1		_	PCS	25.95	MIAMI, FL	NONTAXABLE	16.56	25.95	25.95	
Item	1120		Spokes		1		_	PCS	71.52	MIAMI, FL	NONTAXABLE	61.80	71.52	71.52	
Item	1150		Front Hub		1		_	PCS	137.37	MIAMI, FL	NONTAXABLE	124.91	137.37	137.37	
Item	1151		Axle Front Wheel		1		_	PCS	28.80	MIAMI, FL	NONTAXABLE	15.85	28.80	28.80	
Item	1155		Socket Front		1		_	PCS	28.80	MIAMI, FL	NONTAXABLE	15.95	28.80	28.80	
Item	1160		Tire		1		_	PCS	58.73	MIAMI, FL	NONTAXABLE	34.26	58.73	58.73	
Item	1170		Tube		1		_	PCS	63.70	MIAMI, FL	NONTAXABLE	47.78	63.70	63.70	
Item	1200		Back Wheel		1		_	PCS	41.74	MIAMI, FL	NONTAXABLE	31.23	41.74	41.74	
Item	1250		Back Hub		1		_	PCS	39.40	MIAMI, FL	NONTAXABLE	24.42	39.40	39.40	
Item	1251		Axle Back Wheel		1		_	PCS	28.70	MIAMI, FL	NONTAXABLE	21.00	28.70	28.70	
Item	1255		Socket Back		2		_	PCS	57.40	MIAMI, FL	NONTAXABLE	42.00	114.80	114.80	
Item	1300		Chain Assy		1		_	PCS	97.21	MIAMI, FL	NONTAXABLE	82.40	97.21	97.21	

Document Commissions Calculated.



Document Commissions | Work Date: 1/23/2025

1011 · John Haddock Insurance Co.

General

Document Type: Order

No.: 1011

Sell-to Customer No.: 30000

Sell-to Customer Name: John Haddock Insurance Co.

Commission Base: 261.54

Commission Amount: 0.00

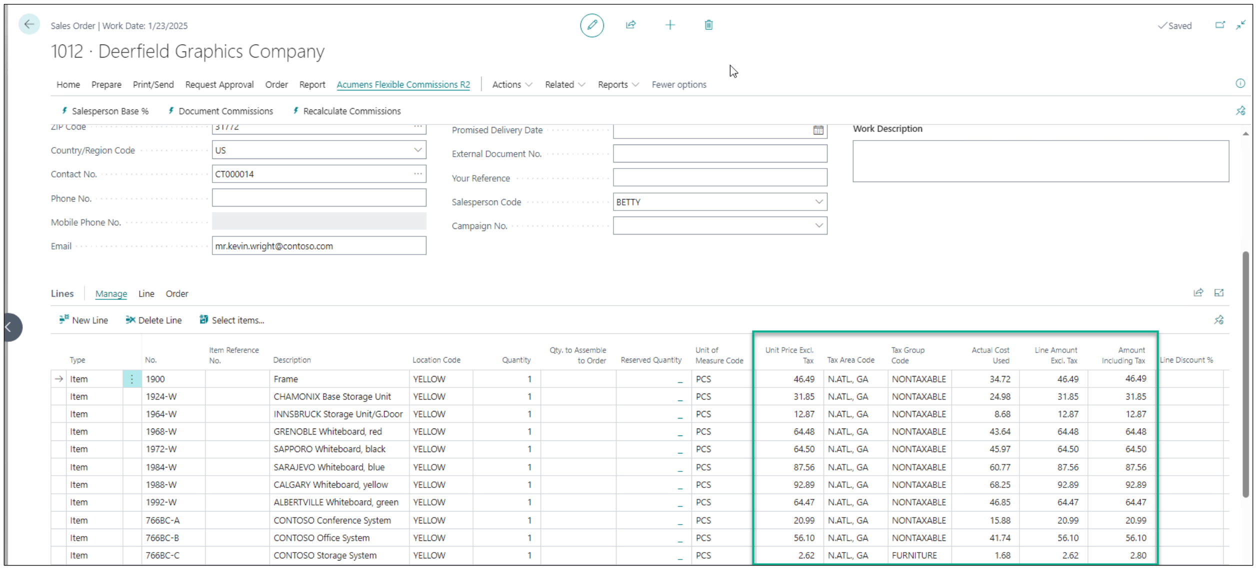
Avg Markup %: 34.02

Document Comm. Subform New Line Delete Line

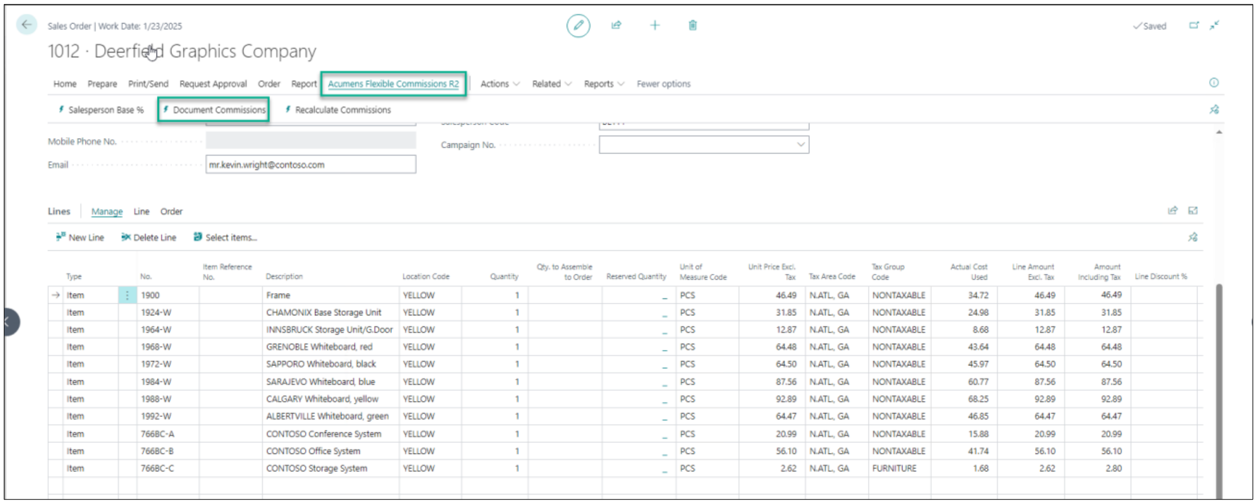
Line No.	Salesperson Code	Type	No.	Description	Line Amount	Margin %	Base %	Commission % (Base)	Commission % (Total)	Base Amount	Commission Amount	Commission Level
10000	CAROLINE	Item	1000	Bicycle	41.02	35.87	100.00	0.00	0.00	10.83	0.00	Non-Comm. SPerson
20000	CAROLINE	Item	1001	Touring Bic...	209.64	42.50	100.00	0.00	0.00	62.52	0.00	Non-Comm. SPerson
30000	CAROLINE	Item	1100	Front Whee	42.86	37.24	100.00	0.00	0.00	11.63	0.00	Non-Comm. SPerson
40000	CAROLINE	Item	1110	Rim	25.95	56.70	100.00	0.00	0.00	9.39	0.00	Non-Comm. SPerson
50000	CAROLINE	Item	1120	Spokes	71.52	15.73	100.00	0.00	0.00	9.72	0.00	Non-Comm. SPerson
60000	CAROLINE	Item	1150	Front Hub	137.37	9.98	100.00	0.00	0.00	12.46	0.00	Non-Comm. SPerson
70000	CAROLINE	Item	1151	Axle Front ...	28.80	81.70	100.00	0.00	0.00	12.95	0.00	Non-Comm. SPerson
80000	CAROLINE	Item	1155	Socket Fron	28.80	80.56	100.00	0.00	0.00	12.85	0.00	Non-Comm. SPerson
90000	CAROLINE	Item	1160	Tire	58.73	71.42	100.00	0.00	0.00	24.47	0.00	Non-Comm. SPerson
100000	CAROLINE	Item	1170	Tube	63.70	33.32	100.00	0.00	0.00	15.92	0.00	Non-Comm. SPerson
110000	CAROLINE	Item	1200	Back Wheel	41.74	33.65	100.00	0.00	0.00	10.51	0.00	Non-Comm. SPerson
120000	CAROLINE	Item	1250	Back Hub	39.40	61.34	100.00	0.00	0.00	14.98	0.00	Non-Comm. SPerson
130000	CAROLINE	Item	1251	Axle Back ...	28.70	36.67	100.00	0.00	0.00	7.70	0.00	Non-Comm. SPerson
140000	CAROLINE	Item	1255	Socket Back	114.80	36.67	100.00	0.00	0.00	30.80	0.00	Non-Comm. SPerson
150000	CAROLINE	Item	1300	Chain Assy	97.21	17.97	100.00	0.00	0.00	14.81	0.00	Non-Comm. SPerson

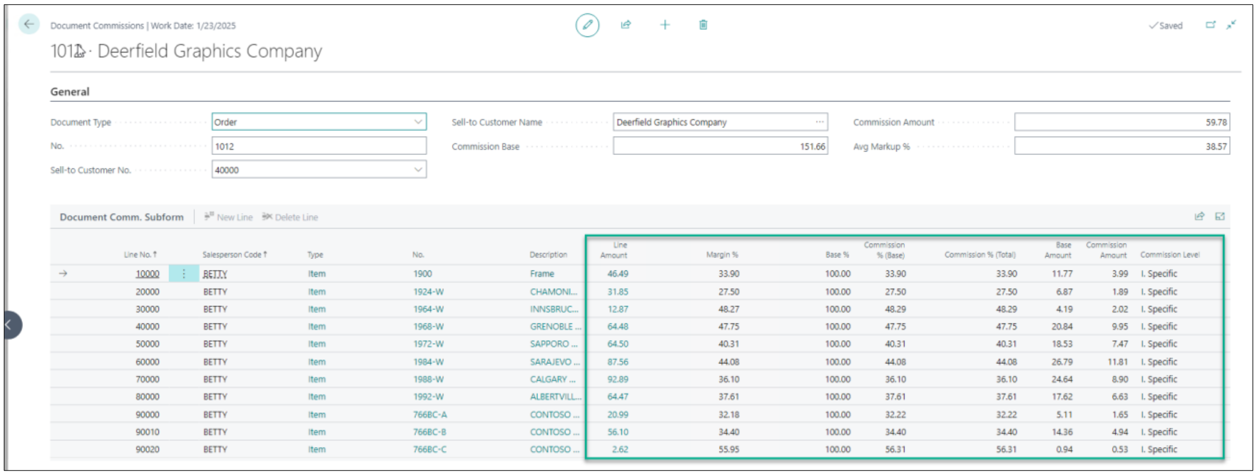
3.2.2 Specific Commissions

This is a sample order for Specific Commissions.



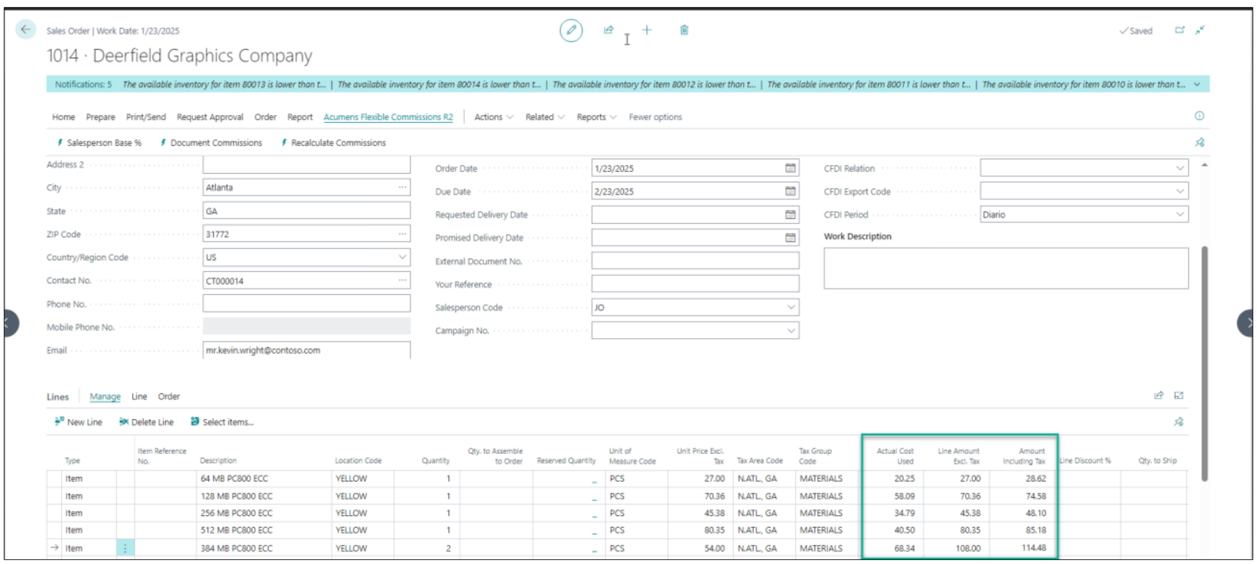
Document Commission Calculated



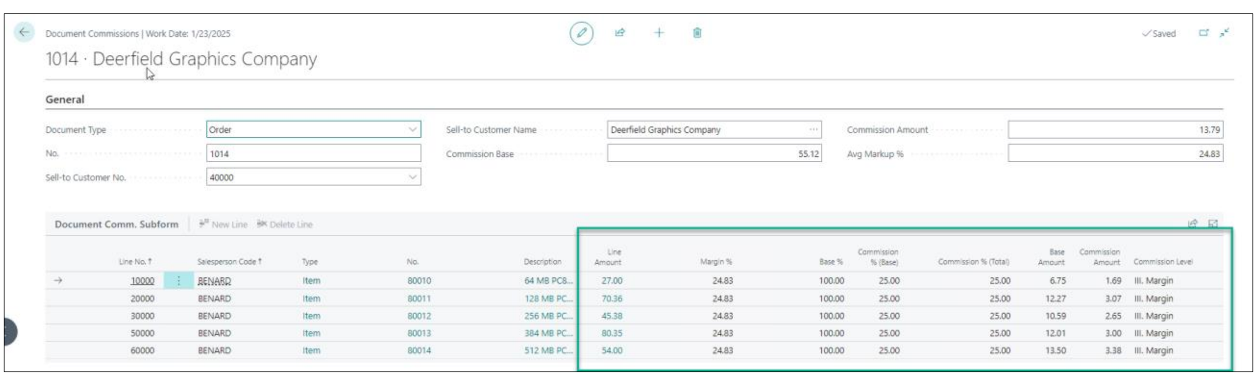


3.2.3 Margin Commissions

This is sample order whereby the Entity has tired Margins

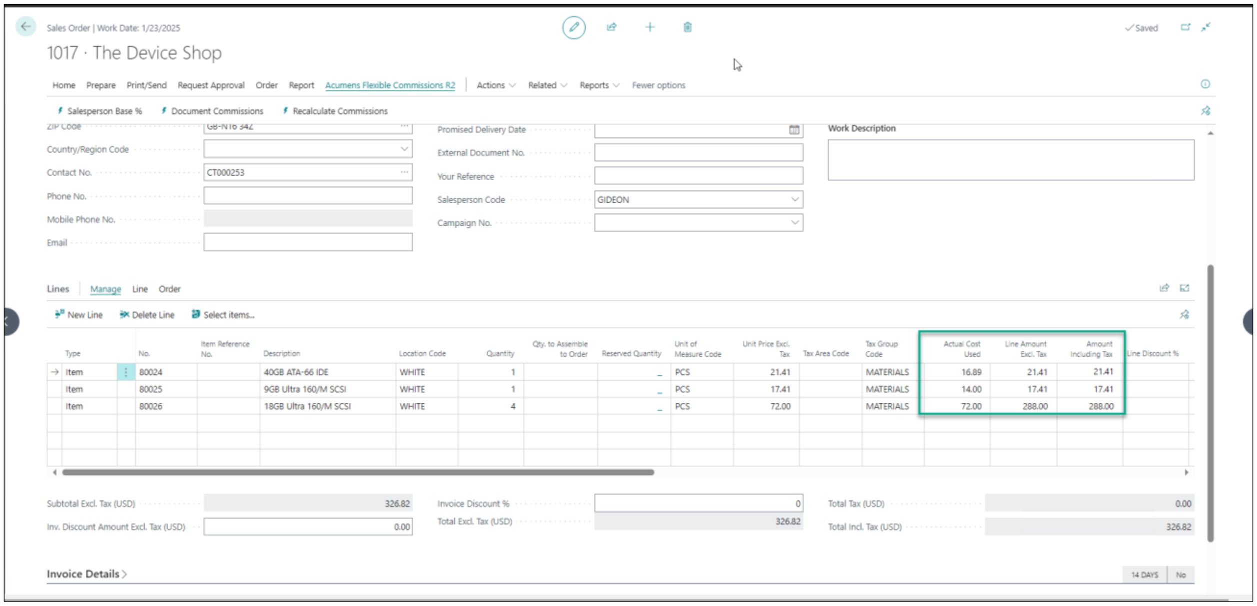


View **Document Commission** Calculated

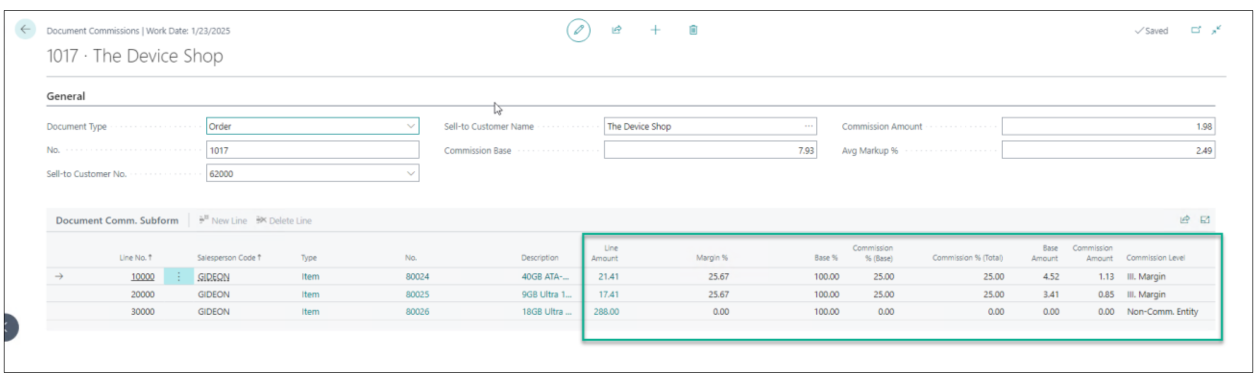


3.2.4 Margin & Non-Commissionable Entity

This is a sample order whereby some Items have tiered Margins setup

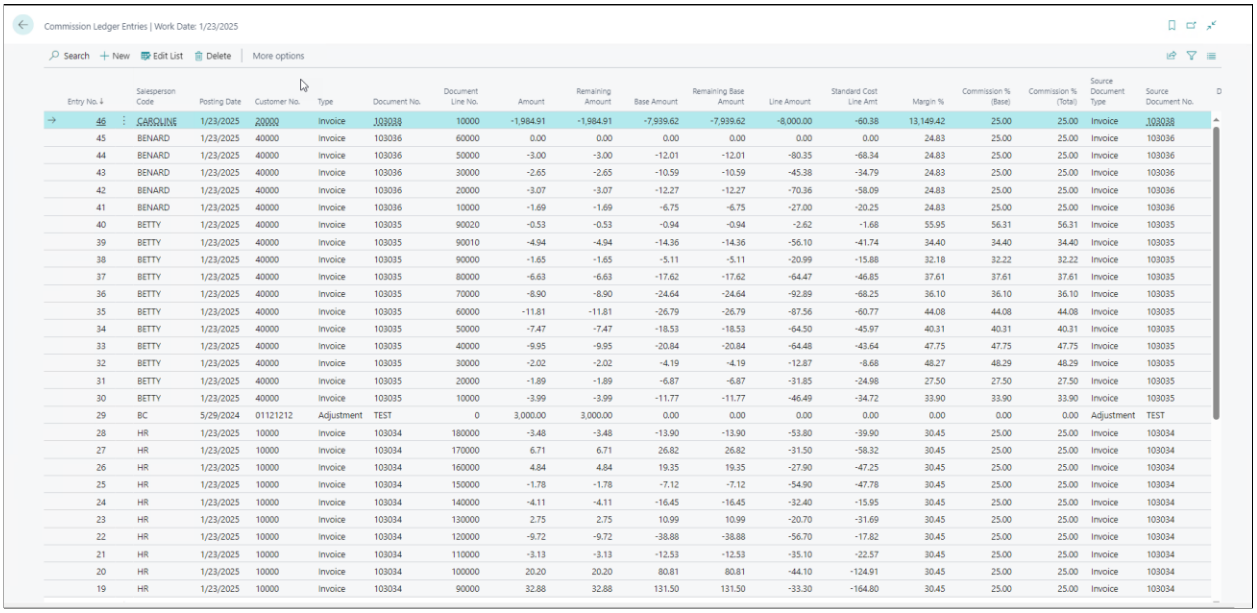


Document Commission Calculated



3.3 Commission Ledger Entries

The transactions posted will appear in the Commission ledger Entries.



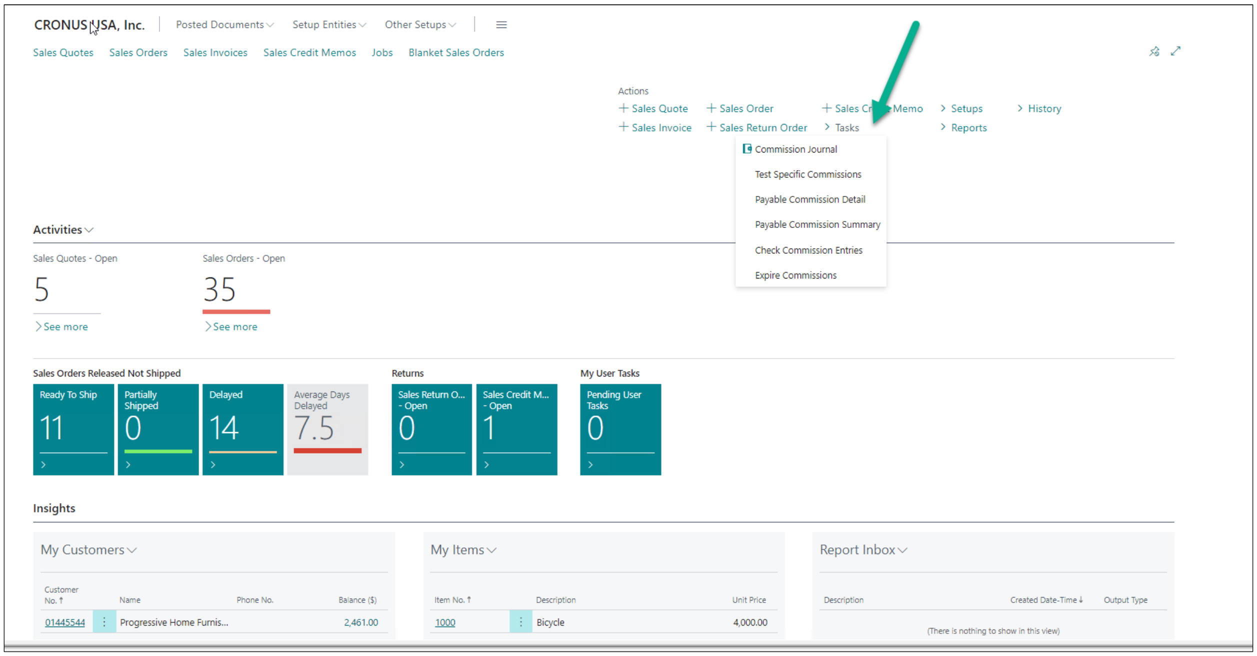
Commission Ledger Entries | Work Date: 1/23/2025

Search | New | Edit List | Delete | More options

Entry No.	Salesperson Code	Posting Date	Customer No.	Type	Document No.	Document Line No.	Amount	Remaining Amount	Base Amount	Remaining Base Amount	Line Amount	Standard Cost Line Amt	Margin %	Commission % (Base)	Commission % (Total)	Source Document Type	Source Document No.	D
46	CAROLINE	1/23/2025	20000	Invoice	103038	10000	-1,984.91	-1,984.91	-7,939.62	-7,939.62	-8,000.00	-60.38	13,149.42	25.00	25.00	Invoice	103038	
45	BENARD	1/23/2025	40000	Invoice	103036	60000	0.00	0.00	0.00	0.00	0.00	0.00	24.83	25.00	25.00	Invoice	103036	
44	BENARD	1/23/2025	40000	Invoice	103036	50000	-3.00	-3.00	-12.01	-12.01	-80.35	-68.34	24.83	25.00	25.00	Invoice	103036	
43	BENARD	1/23/2025	40000	Invoice	103036	30000	-2.65	-2.65	-10.59	-10.59	-45.38	-34.79	24.83	25.00	25.00	Invoice	103036	
42	BENARD	1/23/2025	40000	Invoice	103036	20000	-3.07	-3.07	-12.27	-12.27	-70.36	-58.09	24.83	25.00	25.00	Invoice	103036	
41	BENARD	1/23/2025	40000	Invoice	103036	10000	-1.69	-1.69	-6.75	-6.75	-27.00	-20.25	24.83	25.00	25.00	Invoice	103036	
40	BETTY	1/23/2025	40000	Invoice	103035	90020	-0.53	-0.53	-0.94	-0.94	-2.62	-1.68	55.95	56.31	56.31	Invoice	103035	
39	BETTY	1/23/2025	40000	Invoice	103035	90010	-4.94	-4.94	-14.36	-14.36	-56.10	-41.74	34.40	34.40	34.40	Invoice	103035	
38	BETTY	1/23/2025	40000	Invoice	103035	90000	-1.65	-1.65	-5.11	-5.11	-20.99	-15.88	32.18	32.22	32.22	Invoice	103035	
37	BETTY	1/23/2025	40000	Invoice	103035	80000	-6.63	-6.63	-17.62	-17.62	-64.47	-46.85	37.61	37.61	37.61	Invoice	103035	
36	BETTY	1/23/2025	40000	Invoice	103035	70000	-8.90	-8.90	-24.64	-24.64	-92.89	-68.25	36.10	36.10	36.10	Invoice	103035	
35	BETTY	1/23/2025	40000	Invoice	103035	60000	-11.81	-11.81	-26.79	-26.79	-87.56	-60.77	44.08	44.08	44.08	Invoice	103035	
34	BETTY	1/23/2025	40000	Invoice	103035	50000	-7.47	-7.47	-18.53	-18.53	-64.50	-45.97	40.31	40.31	40.31	Invoice	103035	
33	BETTY	1/23/2025	40000	Invoice	103035	40000	-9.95	-9.95	-20.84	-20.84	-64.48	-43.64	47.75	47.75	47.75	Invoice	103035	
32	BETTY	1/23/2025	40000	Invoice	103035	30000	-2.02	-2.02	-4.19	-4.19	-12.87	-8.68	48.27	48.29	48.29	Invoice	103035	
31	BETTY	1/23/2025	40000	Invoice	103035	20000	-1.89	-1.89	-6.87	-6.87	-31.85	-24.98	27.50	27.50	27.50	Invoice	103035	
30	BETTY	1/23/2025	40000	Invoice	103035	10000	-3.99	-3.99	-11.77	-11.77	-46.49	-34.72	33.90	33.90	33.90	Invoice	103035	
29	BC	5/29/2024	01121212	Adjustment	TEST	0	3,000.00	3,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Adjustment	TEST	
28	HR	1/23/2025	10000	Invoice	103034	180000	-3.48	-3.48	-13.90	-13.90	-53.80	-39.90	30.45	25.00	25.00	Invoice	103034	
27	HR	1/23/2025	10000	Invoice	103034	170000	6.71	6.71	26.82	26.82	-31.50	-58.32	30.45	25.00	25.00	Invoice	103034	
26	HR	1/23/2025	10000	Invoice	103034	160000	4.84	4.84	19.35	19.35	-27.90	-47.25	30.45	25.00	25.00	Invoice	103034	
25	HR	1/23/2025	10000	Invoice	103034	150000	-1.78	-1.78	-7.12	-7.12	-54.90	-47.78	30.45	25.00	25.00	Invoice	103034	
24	HR	1/23/2025	10000	Invoice	103034	140000	-4.11	-4.11	-16.45	-16.45	-32.40	-15.95	30.45	25.00	25.00	Invoice	103034	
23	HR	1/23/2025	10000	Invoice	103034	130000	2.75	2.75	10.99	10.99	-20.70	-31.69	30.45	25.00	25.00	Invoice	103034	
22	HR	1/23/2025	10000	Invoice	103034	120000	-9.72	-9.72	-38.88	-38.88	-56.70	-17.82	30.45	25.00	25.00	Invoice	103034	
21	HR	1/23/2025	10000	Invoice	103034	110000	-3.13	-3.13	-12.53	-12.53	-35.10	-22.57	30.45	25.00	25.00	Invoice	103034	
20	HR	1/23/2025	10000	Invoice	103034	100000	20.20	20.20	80.81	80.81	-44.10	-124.91	30.45	25.00	25.00	Invoice	103034	
19	HR	1/23/2025	10000	Invoice	103034	90000	32.88	32.88	131.50	131.50	-33.30	-164.80	30.45	25.00	25.00	Invoice	103034	

3.4 Commission Processing Tasks

Other Commission Processing Tasks Can be done from the tasks tab in the Role Center.


CRONUS USA, Inc.
Posted Documents
Setup Entities
Other Setups
Sales Quotes
Sales Orders
Sales Invoices
Sales Credit Memos
Jobs
Blanket Sales Orders
Actions
Sales Quote
Sales Order
Setups
History
Sales Invoice
Sales Return Order
Tasks
Reports
Commission Journal
Test Specific Commissions
Payable Commission Detail
Payable Commission Summary
Check Commission Entries
Expire Commissions
Activities
Sales Quotes - Open
5
See more
Sales Orders - Open
35
See more
Sales Orders Released Not Shipped
Ready To Ship
11
Partially Shipped
0
Delayed
14
Average Days Delayed
7.5
Returns
Sales Return O... - Open
0
Sales Credit M... - Open
1
My User Tasks
Pending User Tasks
0
Insights
My Customers
Customer No.
Name
Phone No.
Balance ($)
01445544
Progressive Home Furnis...
2,461.00
My Items
Item No.
Description
Unit Price
1000
Bicycle
4,000.00
Report Inbox
Description
Created Date-Time
Output Type
(There is nothing to show in this view)