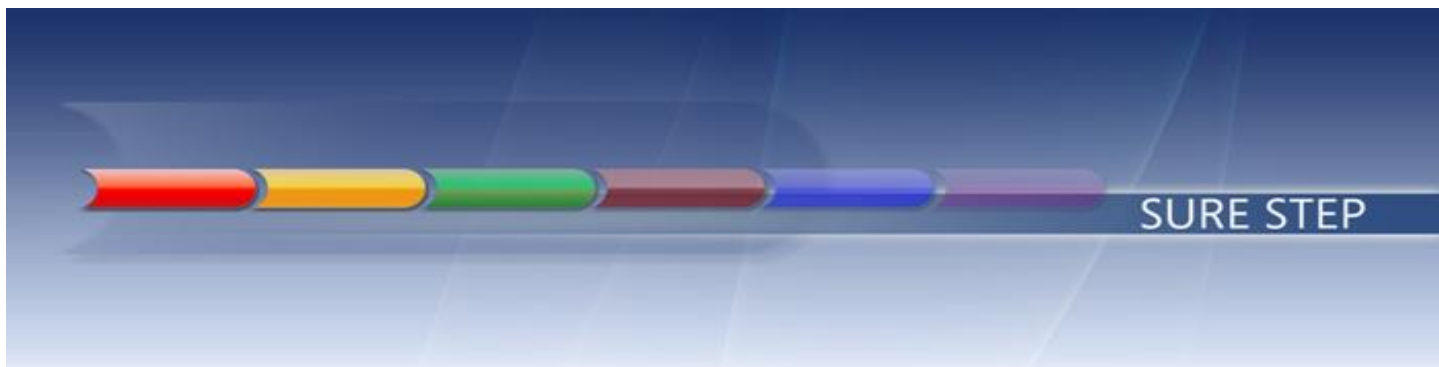




Acumens Flexible Commissions R2 Usage Scenarios Documentation

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	4
2	System Requirements	4
3	Usage.....	4
3.1	Setups	4
3.1.1	Flexible Commissions R2 Setup	4
3.1.2	Salesperson Commissions.....	6
3.1.3	Specific Commissions.....	6
3.1.4	Entity Commissions.....	6
3.1.5	Margin Commissions.....	10
3.1.6	Salesperson Base % on Quotes and Orders	12
3.2	The Sales Process and Commissions Generation	13
3.2.1	Non-Commissionable Entities.....	13
3.2.2	Specific Commissions.....	14
3.2.3	Margin Commissions.....	15
3.2.4	Margin & Non-Commissionable Entity	16
3.3	Commission Ledger Entries	16
3.4	Commission Processing Tasks	17

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 sale 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.

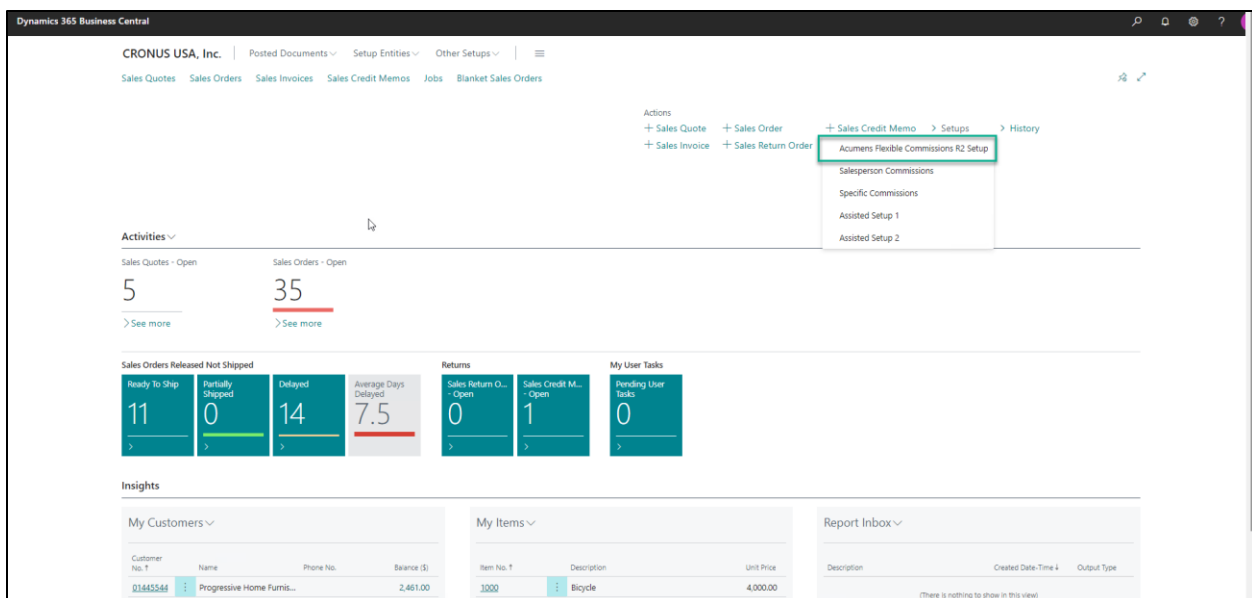
Acumens Flexible Commissions R2 requires Microsoft Dynamics 365 Business Central version 14.00 or later and works with all BC365 clients (Dynamics NAV Web Client, Dynamics NAV Tablet Client, Dynamics NAV Phone Client (in a Browser) and Dynamics NAV Universal App)

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.

Work Date: 1/23/2025

Saved

Acumens Flexible Commissions R2 Setup

General

Enable Flexible Commissions R2

Commission Base Type

Margin % Type

Commission Rounding Precision

Specific Commissions

Entity Commissions

Margin Commissions

Custom Commissions

Special Cost Commissions

Custom Commission Level

Enforce Base Total of 100%

Commissions Payable Upon Sale

Pay Partial Commissions

Suppress Zero Pmt. Entries

Commission Item Cost Adj.

Defaults

Default Percent Type

Default Expiration Days

Salesperson Commissionable

Default Salesperson Comm. %

Item Commissionable

Default Item Comm. %

Account Commissionable

Default Account Comm. %

Resource Commissionable

Default Resource Comm. %

Fixed Asset Commissionable

Default Fixed Asset Comm. %

Commissions Payable Template Name

Commissions Payable Batch Name

Default Expense Acct

Payroll Template

Payroll Batch

Payroll Control Code

Entity Type 1	Minimum Margin % 1	Commission % (Base)
→		
G/L Account	0.00	0.00
Item	0.00	0.00
Item	10.00	10.00
Item	12.00	12.00
Item	15.00	15.00
Item	17.00	17.00

3.1.2 Salesperson Commissions

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

SALESPERSON COMMISSIONS | WORK DATE: 1/30/2022

SAVED

AH Annette Hill

Show Attached | More options

General

Code

AN

Commissions

0.00

Name

Annette Hill

Commissionable Base

0.00

Commissionable

☒

Commissions Paid

0.00

Commission %

0.00

Commission Paid Base

0.00

Email

AH@contoso.com

Commission Due

Commissions Outstanding

0.00

Commission Due Base

0.00

Commission Outstanding Base

0.00

Commissions Possible

0.00

Commissions Due

0.00

Commission Possible Base

0.00

Flag commissionable salespeople and specify their commission rates.

3.1.3 Specific Commissions

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

SPECIFIC COMMISSIONS | WORK DATE: 1/30/2022

SAVED

Search | + New | Edit List | Delete | Show Attached | Open in Excel

EFFECTIVE DATE ↑	ENDING DATE	SALESPER... CODE ↑	CUSTOMER NO. ↑	JOB NO. ↑	TYPE ↑	NO. ↑	COMMISSION % (BASE)	ENTITY DESCRIPTION	ENTITY DESCRIPTION
7/12/2023		AH	40000		Item	1110	12.00	Annette Hill	Annette Hill
					G/L Account				
					Item				
					Resource				
					Fixed Asset				
					Charge (Item)				

3.1.4 Entity Commissions

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

Dynamics 365 Business Central

CRONUS USA, Inc. | Posted Documents

TELL ME WHAT YOU WANT TO DO

SALES

SALES QUOTES | SALES ORDERS | SALES INVOICES

HEADLINE

Good morning Sebastian!

ACTIONS

+ Sales Quote | + Sales Return Order | + Sales Invoice | + Sales Credit Memo

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

Item Card | Work Date: 1/23/2025

✓ Saved

1000 - Bicycle

Home

Order

Approve

Posting

Report

Acumens Flexible Commissions R2

More options

Copy Item

Create Stockkeeping Unit

Apply Template

Unit Cost30.19

Inventory Posting GroupFINISHED

Net Invoiced Qty.-9

Default Deferral Template

Cost is Adjusted

Foreign Trade

Purchase Prices & DiscountsCreate New...

Tariff No.

Prices & Sales

Show less

Unit Price4,000.00

Profit %99.25

Sales Unit of MeasurePCS

Unit Price Excl. Tax4,000.00

Sales Prices & DiscountsView Existing Prices and Discounts...

Sales Blocked

Price Includes Tax

Allow Invoice Disc.

Tax Bus. Posting Gr. (Price)

Price/Profit CalculationProfit=Price-Cost

Item Disc. GroupA

Replenishment

Prod. Order

Planning

Fixed Reorder Qty. None

Item Tracking

Warehouse

Flexible Commissions R2

Commissionable

Commission %0.00

Commission Vendor

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

For Resources

Resource Card | Work Date: 1/23/2025

+

KATHERINE · Katherine Hull

[Home](#) | [Resource](#) | [Report](#) | [More options](#)

Create Time Sheets...

General

Show more

No. KATHERINE ...

Name Katherine Hull

Type Person

Base Unit of Measure HOUR

Search Name KATHERINE HULL

Resource Group No.

Blocked

Last Date Modified 5/22/2024

Use Time Sheet

Time Sheet Owner User ID ..

Time Sheet Approver Use... ..

Invoicing

Direct Unit Cost 8.80

Indirect Cost % 10.00

Unit Cost 9.70

Price/Profit Calculation Profit=Price-Cost

Profit % 49.74093

Unit Price 19.30

Tax Group Code LABOR

Gen. Prod. Posting Group .. SERVICES

VAT Prod. Posting Group ...

Default Deferral Template ..

Automatic Ext. Text

IC Partner Purch. G/L Acc....

Personal Data >

Flexible Commissions R2

Commissionable

Commission % 30.00

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

▼

Gen. Bus. Posting Gro...

▼

Gen. Prod. Posting Gr...

▼

VAT Bus. Posting Gro...

▼

VAT Prod. Posting Gr...

▼

Tax Group Code

NONTAXABLE

▼

Default IC Partner G/...

▼

Default Deferral Tem...

▼

Consolidation >

Average Rate (Manual)

Reporting >

No Adjustment

Cost Accounting >

Flexible Commissions R2

Commissionable

Commission %

0.00

For Fixed Assets

Fixed Asset Card | Work Date: 1/23/2025

FA000020 · Toyota Supra 3.0

[Home](#) [Fixed Asset](#) [Report](#) [Acumens Flexible Commissions R2](#) [More options](#)

[Acquire](#) [Copy Fixed Asset...](#)

General

Description

Toyota Supra 3.0

Serial No.

EA 12 395 Q

FA Class Code

TANGIBLE

Search Description

TOYOTA SUPRA 3.0

FA Subclass Code

CAR

Responsible Employee

JO

Depreciation Book

Depreciation Method

Straight-Line

Depreciation Starting Date

5/1/2024

Book Value

56,094.03

No. of Depreciation Years

5.00

Depreciation Ending Date

4/30/2029

Maintenance

44127914 44127914 7/15/2025

Flexible Commissions R2

Commissionable

Commission %

0.00

Electronic Document

3.1.5 Margin Commissions

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

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 Invoice

+ Sales Order

+ Sales Return Order

+ Sales Credit Memo

+ Setups

+ History

Acumens Flexible Commissions R2 Setup

Salesperson Commissions

Specific Commissions

Assisted Setup 1

Assisted Setup 2

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
10000	The Cannon Group B...	785.379.99	

My Items

Item No. ?	Description	Unit Price
1000	Bicycle	4,000.00
1001	Truonon Bioride	4,000.00

Report Inbox

Description	Created Date-Time	Output Type
(There is nothing to show in this view)		

Page 10 of 18

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.

Work Date: 1/23/2025

✓ Saved

Acumens Flexible Commissions R2 Setup

Enable Flexible Commissions R2

Commission Base Type

Profit

Margin % Type

Margin

Commission Rounding Precision

0.01

Specific Commissions

Entity Commissions

Margin Commissions

Custom Commissions

Special Cost Commissions

Custom Commission Level

IV. Salesperson

Enforce Base Total of 100%

Commissions Payable Upon Sale

Pay Partial Commissions

Suppress Zero Pmt. Entries

Commission Item Cost Adj.

Defaults

Default Percent Type

Total

Default Expiration Days

0

Salesperson Commissionable

Default Salesperson Comm. %

0.00

Item Commissionable

Default Item Comm. %

0.00

Account Commissionable

Default Account Comm. %

0.00

Resource Commissionable

Default Resource Comm. %

0.00

Fixed Asset Commissionable

Default Fixed Asset Comm. %

0.00

Commissions Payable Template Name

Commissions Payable Batch Name

Default Expense Acct

Payroll Template

Payroll Batch

Payroll Control Code

Entity Type 1	Minimum Margin % 1	Commission % (Base)
→		
G/L Account	0.00	0.00
Item	0.00	0.00
Item	10.00	10.00
Item	12.00	12.00
Item	15.00	15.00
Item	17.00	17.00
Item	20.00	20.00
Item	22.00	22.00

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.

Customer Card | Work Date: 1/23/2025

20000 · Selangorian Ltd.

Home | Posting | Approve | Prepare | Request Approval | Report | **Accumens Flexible Commissions R2** | Actions | Related | Reports | Fewer options

Salesperson Base %

General

No.20000

NameSelangorian Ltd.

CFDI Customer Name*

IC Partner Code

Balance (\$)

Balance Due (\$)

Credit Limit (\$)

Blocked

Privacy Blocked

Salesperson CodeCAROLINE

Salesperson Base Count1

Responsibility Center

Service Zone CodeN

Document Sending Profile

Total Sales18,007.97

Costs (\$)

Profit (\$)

Profit %65.2

CFDI Purpose

CFDI Relation

CFDI Export Code

SAT Tax Regime Classifica...

CFDI General Public

CFDI PeriodDiario

Last Date Modified6/7/2024

Disable Search by Name

Details

Attachments (0)

Customer Picture

Sell-to Customer Sales History

Customer No.20000

6191

Edit - Salesperson Base % - Customer 20000

Search | + New | **Edit List** | Delete | Show Current | Show All

Effective Date ↑	Ending Date	Salesperson Code ↑	Base %	Salesperson Name
→		CAROLINE	100.00	Caroline

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. Campaign No.

Email miss.patricia.doyle@contoso.com

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	MIAM, FL	NONTAXABLE	30.19	41.02	41.02	
Item	1001		Touring Bicycle		2			PCS	104.82	MIAM, FL	NONTAXABLE	73.56	209.64	209.64	
Item	1100		Front Wheel		1			PCS	42.86	MIAM, FL	NONTAXABLE	31.23	42.86	42.86	
Item	1110		Rim		1			PCS	25.95	MIAM, FL	NONTAXABLE	16.56	25.95	25.95	
Item	1120		Spokes		1			PCS	71.52	MIAM, FL	NONTAXABLE	61.80	71.52	71.52	
Item	1150		Front Hub		1			PCS	137.37	MIAM, FL	NONTAXABLE	124.91	137.37	137.37	
Item	1151		Axle Front Wheel		1			PCS	28.80	MIAM, FL	NONTAXABLE	15.85	28.80	28.80	
Item	1155		Socket Front		1			PCS	28.80	MIAM, FL	NONTAXABLE	15.95	28.80	28.80	
Item	1160		Tire		1			PCS	58.73	MIAM, FL	NONTAXABLE	34.26	58.73	58.73	
Item	1170		Tube		1			PCS	63.70	MIAM, FL	NONTAXABLE	47.78	63.70	63.70	
Item	1200		Back Wheel		1			PCS	41.74	MIAM, FL	NONTAXABLE	31.23	41.74	41.74	
Item	1250		Back Hub		1			PCS	39.40	MIAM, FL	NONTAXABLE	24.42	39.40	39.40	
Item	1251		Axle Back Wheel		1			PCS	28.70	MIAM, FL	NONTAXABLE	21.00	28.70	28.70	
Item	1255		Socket Back		2			PCS	57.40	MIAM, FL	NONTAXABLE	42.00	114.80	114.80	
Item	1300		Chain Assy		1			PCS	97.21	MIAM, 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 Sell-to Customer Name John Haddock Insurance Co. Commission Amount 0.00

No. 1011 Commission Base 261.54 Avg Markup % 34.02

Sell-to Customer No. 30000

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 Wheel	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 Front	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.

Sales Order | Work Date: 1/23/2025

1012 - Deerfield Graphics Company

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

Salesperson Base %

Document Commissions

Recalculate Commissions

ZIP Code11714

Country/Region CodeUS

Contact No.CT000014

Phone No.

Mobile Phone No.

Emailmr.kevin.wright@contoso.com

Promised Delivery Date

External Document No.

Your Reference

Salesperson CodeBETTY

Campaign No.

Work Description

LinesManageLineOrder

New LineDelete LineSelect 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	1900		Frame	YELLOW	1			PCS	46.49	NATL, GA	NONTAXABLE	34.72	46.49	46.49	
Item	1924-W		CHAMONIX Base Storage Unit	YELLOW	1			PCS	31.85	NATL, GA	NONTAXABLE	24.98	31.85	31.85	
Item	1964-W		INNSBRUCK Storage Unit/G.Door	YELLOW	1			PCS	12.87	NATL, GA	NONTAXABLE	8.68	12.87	12.87	
Item	1968-W		GRENOBLE Whiteboard, red	YELLOW	1			PCS	64.48	NATL, GA	NONTAXABLE	43.64	64.48	64.48	
Item	1972-W		SAPORO Whiteboard, black	YELLOW	1			PCS	64.50	NATL, GA	NONTAXABLE	45.97	64.50	64.50	
Item	1984-W		SARAJEVO Whiteboard, blue	YELLOW	1			PCS	87.56	NATL, GA	NONTAXABLE	60.77	87.56	87.56	
Item	1988-W		CALGARY Whiteboard, yellow	YELLOW	1			PCS	92.89	NATL, GA	NONTAXABLE	68.25	92.89	92.89	
Item	1992-W		ALBERTVILLE Whiteboard, green	YELLOW	1			PCS	64.47	NATL, GA	NONTAXABLE	46.85	64.47	64.47	
Item	7668C-A		CONTOSO Conference System	YELLOW	1			PCS	20.99	NATL, GA	NONTAXABLE	15.88	20.99	20.99	
Item	7668C-B		CONTOSO Office System	YELLOW	1			PCS	56.10	NATL, GA	NONTAXABLE	41.74	56.10	56.10	
Item	7668C-C		CONTOSO Storage System	YELLOW	1			PCS	2.62	NATL, GA	FURNITURE	1.68	2.62	2.80	

Document Commission Calculated

Sales Order | Work Date: 1/23/2025

1012 - Deerfield Graphics Company

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

Salesperson Base %

Document Commissions

Recalculate Commissions

Mobile Phone No.

Emailmr.kevin.wright@contoso.com

Campaign No.

LinesManageLineOrder

New LineDelete LineSelect 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	1900		Frame	YELLOW	1			PCS	46.49	NATL, GA	NONTAXABLE	34.72	46.49	46.49	
Item	1924-W		CHAMONIX Base Storage Unit	YELLOW	1			PCS	31.85	NATL, GA	NONTAXABLE	24.98	31.85	31.85	
Item	1964-W		INNSBRUCK Storage Unit/G.Door	YELLOW	1			PCS	12.87	NATL, GA	NONTAXABLE	8.68	12.87	12.87	
Item	1968-W		GRENOBLE Whiteboard, red	YELLOW	1			PCS	64.48	NATL, GA	NONTAXABLE	43.64	64.48	64.48	
Item	1972-W		SAPORO Whiteboard, black	YELLOW	1			PCS	64.50	NATL, GA	NONTAXABLE	45.97	64.50	64.50	
Item	1984-W		SARAJEVO Whiteboard, blue	YELLOW	1			PCS	87.56	NATL, GA	NONTAXABLE	60.77	87.56	87.56	
Item	1988-W		CALGARY Whiteboard, yellow	YELLOW	1			PCS	92.89	NATL, GA	NONTAXABLE	68.25	92.89	92.89	
Item	1992-W		ALBERTVILLE Whiteboard, green	YELLOW	1			PCS	64.47	NATL, GA	NONTAXABLE	46.85	64.47	64.47	
Item	7668C-A		CONTOSO Conference System	YELLOW	1			PCS	20.99	NATL, GA	NONTAXABLE	15.88	20.99	20.99	
Item	7668C-B		CONTOSO Office System	YELLOW	1			PCS	56.10	NATL, GA	NONTAXABLE	41.74	56.10	56.10	
Item	7668C-C		CONTOSO Storage System	YELLOW	1			PCS	2.62	NATL, GA	FURNITURE	1.68	2.62	2.80	

Document Commissions | Work Date: 1/23/2025

1014 · Deerfield Graphics Company

General

Document Type: Order
 No.: 1012
 Sell-to Customer No.: 40000

Sell-to Customer Name: Deerfield Graphics Company
 Commission Base: 151.66
 Commission Amount: 59.78
 Avg Markup %: 38.57

Line No. #	Salesperson Code #	Type	No.	Description	Line Amount	Margin %	Base %	Commission % (Base)	Commission % (Total)	Base Amount	Commission Amount	Commission Level
10000	BETTY	Item	1900	Frame	46.49	33.90	100.00	33.90	33.90	11.77	3.99	I. Specific
20000	BETTY	Item	1924-W	CHAMON...	31.85	27.50	100.00	27.50	27.50	6.87	1.89	I. Specific
30000	BETTY	Item	1964-W	INNSBRUC...	12.87	48.27	100.00	48.29	48.29	4.19	2.02	I. Specific
40000	BETTY	Item	1968-W	GRENOBLE ...	64.48	47.75	100.00	47.75	47.75	20.84	9.95	I. Specific
50000	BETTY	Item	1972-W	SAPORO ...	64.50	40.31	100.00	40.31	40.31	18.53	7.47	I. Specific
60000	BETTY	Item	1984-W	SARAJEVO ...	87.56	44.08	100.00	44.08	44.08	26.79	11.81	I. Specific
70000	BETTY	Item	1988-W	CALGARY ...	92.89	36.10	100.00	36.10	36.10	24.64	8.90	I. Specific
80000	BETTY	Item	1992-W	ALBERTVILL...	64.47	37.61	100.00	37.61	37.61	17.62	6.63	I. Specific
90000	BETTY	Item	7668C-A	CONTOSO ...	20.99	32.18	100.00	32.22	32.22	5.11	1.65	I. Specific
90010	BETTY	Item	7668C-B	CONTOSO ...	36.10	34.40	100.00	34.40	34.40	14.36	4.94	I. Specific
90020	BETTY	Item	7668C-C	CONTOSO ...	2.62	55.95	100.00	56.31	56.31	0.94	0.53	I. Specific

3.2.3 Margin Commissions

This is sample order whereby the Entity has tired Margins

Sales Order | Work Date: 1/23/2025

1014 · Deerfield Graphics Company

Notifications: 5 The available inventory for item 80014 is lower than L... | The available inventory for item 80012 is lower than L... | The available inventory for item 80011 is lower than L... | The available inventory for item 80010 is lower than L...

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

Salesperson Base % Document Commissions Recalculate Commissions

Address 2: Atlanta
 City: Atlanta
 State: GA
 ZIP Code: 31772
 Country/Region Code: US
 Contact No.: CT000014
 Phone No.:
 Mobile Phone No.:
 Email: mr.kevin.wright@contoso.com

Order Date: 1/23/2025
 Due Date: 2/23/2025
 Requested Delivery Date:
 Promised Delivery Date:
 External Document No.:
 Your Reference:
 Salesperson Code: JO
 Campaign No.:

CFDI Relation:
 CFDI Export Code:
 CFDI Period: Diario
 Work Description:

Lines | Manage | Line | Order

New Line Delete Line Select items...

Type	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 %	Qty. to Ship
Item		64 MB PC800 ECC	YELLOW	1			PCS	27.00	NATL, GA	MATERIALS	20.25	27.00	28.62		
Item		128 MB PC800 ECC	YELLOW	1			PCS	70.36	NATL, GA	MATERIALS	58.09	70.36	74.58		
Item		256 MB PC800 ECC	YELLOW	1			PCS	45.38	NATL, GA	MATERIALS	34.79	45.38	48.10		
Item		512 MB PC800 ECC	YELLOW	1			PCS	80.35	NATL, GA	MATERIALS	40.50	80.35	85.18		
Item		384 MB PC800 ECC	YELLOW	2			PCS	54.00	NATL, GA	MATERIALS	68.34	108.00	114.48		

View Document Commission Calculated

Document Commissions | Work Date: 1/23/2025

1014 · Deerfield Graphics Company

General

Document Type: Order
 No.: 1014
 Sell-to Customer No.: 40000

Sell-to Customer Name: Deerfield Graphics Company
 Commission Base: 55.12
 Commission Amount: 13.79
 Avg Markup %: 24.83

Line No. #	Salesperson Code #	Type	No.	Description	Line Amount	Margin %	Base %	Commission % (Base)	Commission % (Total)	Base Amount	Commission Amount	Commission Level
10000	BENARD	Item	80010	64 MB PC...	27.00	24.83	100.00	25.00	25.00	6.75	1.69	III. Margin
20000	BENARD	Item	80011	128 MB PC...	70.36	24.83	100.00	25.00	25.00	12.27	3.07	III. Margin
30000	BENARD	Item	80012	256 MB PC...	45.38	24.83	100.00	25.00	25.00	10.59	2.65	III. Margin
50000	BENARD	Item	80013	384 MB PC...	80.35	24.83	100.00	25.00	25.00	12.01	3.00	III. Margin
60000	BENARD	Item	80014	512 MB PC...	54.00	24.83	100.00	25.00	25.00	13.50	3.38	III. Margin

3.2.4 Margin & Non-Commissionable Entity

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

Sales Order | Work Date: 1/23/2025

1017 - The Device Shop

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

Salesperson Base %

Document Commissions

Recalculate Commissions

ZIP Code

Country/Region Code

Contact No.

Phone No.

Mobile Phone No.

Email

Promised Delivery Date

External Document No.

Your Reference

Salesperson Code

Campaign No.

Work Description

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	80024		40GB ATA-66 IDE	WHITE	1			PCS	21.41		MATERIALS	16.89	21.41	21.41	
Item	80025		9GB Ultra 160/M SCSI	WHITE	1			PCS	17.41		MATERIALS	14.00	17.41	17.41	
Item	80026		18GB Ultra 160/M SCSI	WHITE	4			PCS	72.00		MATERIALS	72.00	288.00	288.00	

Subtotal Excl. Tax (USD)

326.82

Invoice Discount %

0

Total Tax (USD)

0.00

Inv. Discount Amount Excl. Tax (USD)

0.00

Total Excl. Tax (USD)

326.82

Total Incl. Tax (USD)

326.82

Invoice Details >

14 DAYS No

Document Commission Calculated

Document Commissions | Work Date: 1/23/2025

1017 - The Device Shop

General

Document Type

Order

Sell-to Customer Name

The Device Shop

Commission Amount

1.98

No.

1017

Commission Base

7.93

Avg Markup %

2.49

Sell-to Customer No.

62000

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	GIDEON	Item	80024	40GB ATA-...	21.41	25.67	100.00	25.00	25.00	4.52	1.13	III. Margin
20000	GIDEON	Item	80025	9GB Ultra 1...	17.41	25.67	100.00	25.00	25.00	3.41	0.85	III. Margin
30000	GIDEON	Item	80026	18GB Ultra ...	288.00	0.00	100.00	0.00	0.00	0.00	0.00	Non-Comm. Entity

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)
46	GASOLINE	1/23/2025	20000	Invoice	103036	10000	-1,984.91	-1,984.91	-7,939.62	-7,939.62	-8,000.00	-60.38	13.149.42	25.00
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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	HR	1/23/2025	10000	Invoice	103034	150000	-1.78	-1.78	-7.12	-7.12	-54.90	-47.78	30.45	25.00
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
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
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
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
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
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

3.4 Commission Processing Tasks

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

CRONUSUSA, Inc.

Posted Documents Setup Entities Other Setups

Sales QuotesSales OrdersSales InvoicesSales Credit MemosJobsBlanket Sales Orders

Actions

+ Sales Quote+ Sales Order+ Sales Credit Memo+ Sales Invoice+ Sales Return OrderTasks

SetupReportsHistory

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 Orders - Open

0

Sales Credit Memos - 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)		