Advanced Commissions for Acumatica

USER GUIDE

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Acumatica Software Versions Supported –2021R2, 2022R1, 2022R2 and 2023R1

Updated: August 2023

Advanced Commissions Overview

With the Advanced Commissions Package, new flexible functionality related to automatic commission processing has been added and the basic Commission Feature that comes with the Acumatica Advanced Financials should be disabled. When the Advanced Commissions is purchased and installed, the Advanced Commissions Module completely replaces the basic Commissions that come with the Advanced Financials. If this feature is not disabled in the Enable/Disable Form, please uncheck or disable it from this Form (CS100000) as shown in the screenshot below. Screens, Reports, and processes for the disabled Commissions feature will no longer be used or applicable and are replaced with the new Advanced Commission Screens, Processes, and Reports. You do not have to check anything on the Enable/Disable screen for Advanced Commissions; all features will be added when the customization package is published.

Installation and Configuration Guide

Step 1: Install Acumatica software

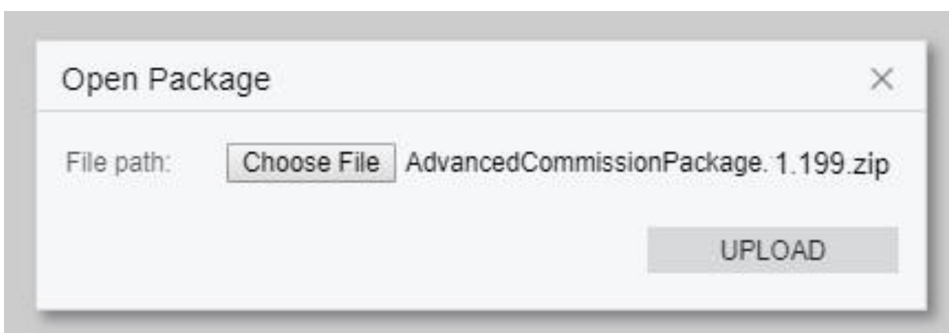
1. Follow the Acumatica installation guide.

Step 2: Import and Publish Customization Project

Importing Customization Project

1. Download the latest Customization Package (AdvancedCommissionPackage.1.202.zip)
2. On the **Customization Projects form** (SM204505; Configuration > Customization) click **Import** on the form toolbar, as the screenshot below shows.

3. In the **Open Package** dialog box, which opens, click **Choose File**.
4. In the **Open** dialog box, which opens, select the deployment package file to be uploaded.
   a. The name of the selected file is displayed in the **File path** box of the **Open Package** dialog box, as shown in the screenshot.



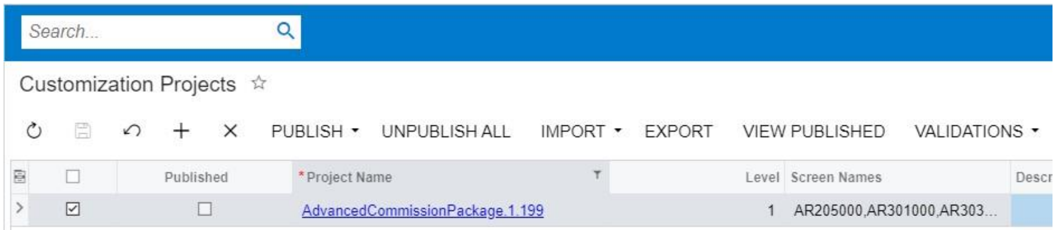
5. In the **Open Package** dialog box, click **Upload**.
   The platform uploads the selected package, creates the corresponding customization project, and saves the project in the database. As a result, the new customization project appears in the list on the Customization Projects form; therefore, you can access the project data and manage the project.

Publishing Customization Projects

To apply a customization project to an instance of Acumatica ERP, you have to publish the customization project. When you publish a customization project, the system applies the changes in the project to the website. After the customization project has been published, the user will see the modified Acumatica ERP. The changes apply to the website of Acumatica ERP and therefore affect all tenants in the system.

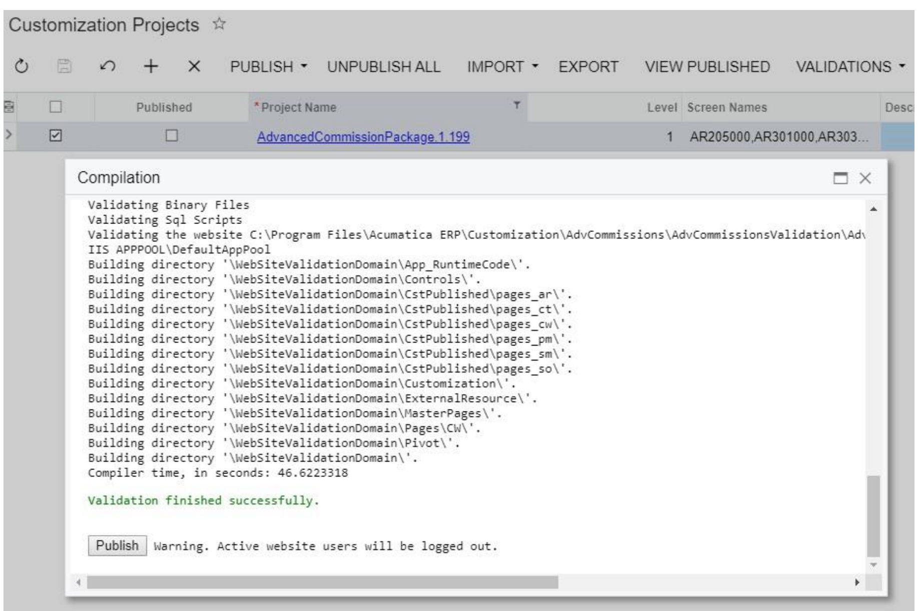
Steps to publish:

1. In the project list of **Customization Projects form** (SM204505; Configuration > Customization), select the checkbox (in the unlabeled column) for the needed customization project, as the screenshot below shows.

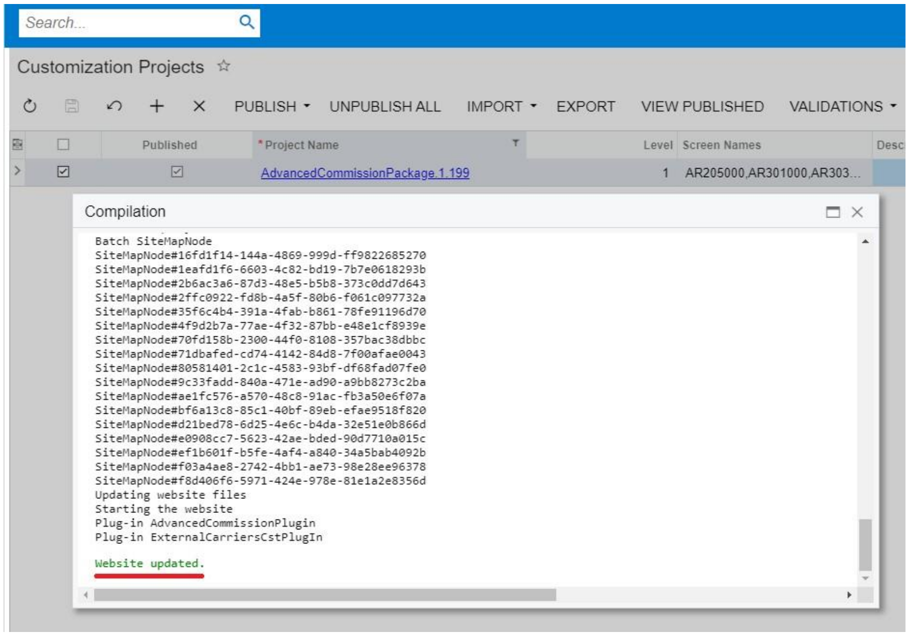


2. Clear selected checkboxes in this column for other customization projects if needed.
Note: All previously published projects that are not selected will be unpublished.

3. Click Publish on the form toolbar to initiate the publication of the selected project. This may take a few minutes to complete.



4. When you see the “Publish” button at the bottom of the pop-up screen (shown above), click **Publish**. This may take a few minutes to complete. It’s finished when you see “Website Updated.” See the screenshot below.

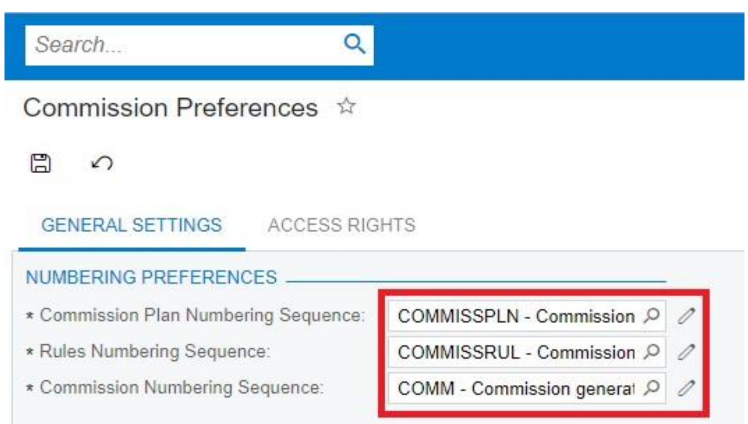


Step 3: Applying Preferences

Upon installing Advanced Commission's package, the new module features will be available to the users by default. There is no need to enable any features on Enable/Disable Features form (CS100000; System Management > Enable/Disable Features) to get full access to Advanced Commissions functionality.

To set up a Commission plan the following actions should be performed:

1. Navigate to the Commission Preferences form (CWAC1010; Commissions > Commissions Preferences) 2. Leave the fields prefilled by the system without any changes as it is shown in the screenshot below:



2. Save the preferences

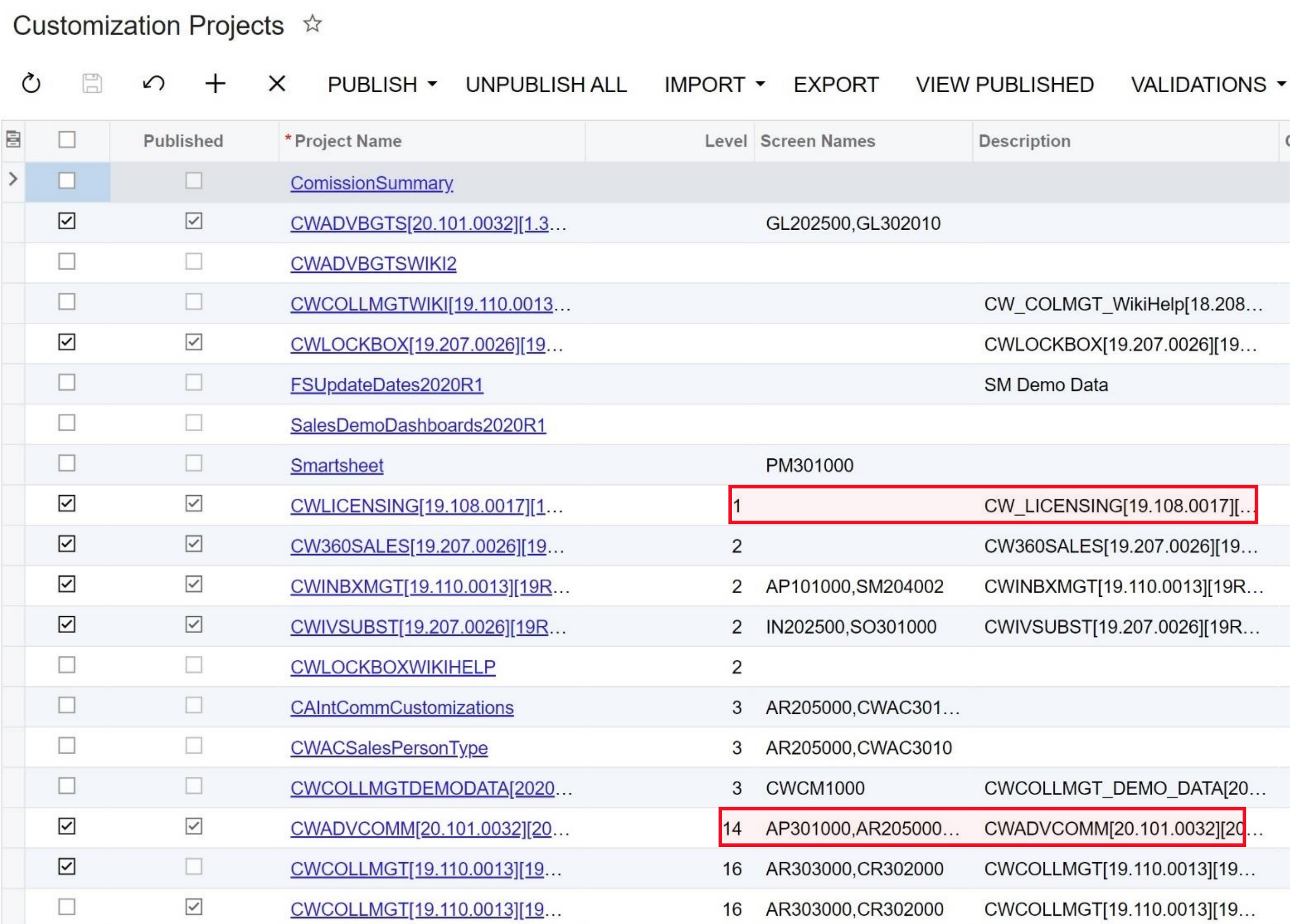
After performing all the steps listed above, the Advanced Commissions module is now ready to be used.

Delete Procedure

To entirely remove the Advanced Commissions solution the following steps needed to be taken:

Unpublish solution

1. Log in to the Acumatica instance under the tenant with the published Advanced Commissions solution.
2. Navigate to **Customization Projects** Screen (SM204505): **More Items** -> **Customization** -> **Customization Projects**.
3. The **Customization Projects** will display the following:



☐	Published	* Project Name	Level	Screen Names	Description
☐	☐	ComissionSummary			
☑	☑	CWADVBGTS[20.101.0032][1.3…		GL202500,GL302010	
☐	☐	CWADVBGTSWIKI2			
☐	☐	CWCOLLMGTWIKI[19.110.0013…			CW_COLMGT_WikiHelp[18.208…
☑	☑	CWLOCKBOX[19.207.0026][19…			CWLOCKBOX[19.207.0026][19…
☐	☐	FSUpdateDates2020R1			SM Demo Data
☐	☐	SalesDemoDashboards2020R1			
☐	☐	Smartsheet		PM301000	
☑	☑	CWLICENSING[19.108.0017][1…	1		CW_LICENSING[19.108.0017][…
☑	☑	CW360SALES[19.207.0026][19…	2		CW360SALES[19.207.0026][19…
☑	☑	CWINBXMGT[19.110.0013][19R…	2	AP101000,SM204002	CWINBXMGT[19.110.0013][19R…
☑	☑	CWIVSUBST[19.207.0026][19R…	2	IN202500,SO301000	CWIVSUBST[19.207.0026][19R…
☐	☐	CWLOCKBOXWIKIHELP	2		
☐	☐	CAIntCommCustomizations	3	AR205000,CWAC301…	
☐	☐	CWACSalesPersonType	3	AR205000,CWAC3010	
☐	☐	CWCOLLMGTDEMODATA[2020…	3	CWCM1000	CWCOLLMGT_DEMO_DATA[20…
☑	☑	CWADVCOMM[20.101.0032][20…	14	AP301000,AR205000…	CWADVCOMM[20.101.0032][20…
☑	☐	CWCOLLMGT[19.110.0013][19…	16	AR303000,CR302000	CWCOLLMGT[19.110.0013][19…
☐	☑	CWCOLLMGT[19.110.0013][19…	16	AR303000,CR302000	CWCOLLMGT[19.110.0013][19…

4. Clear the checkbox for the installed projects:
   a. CWLICENSING[19.108.0017][1…]
   b. CWADVCOMM[20.101.0032][20…]
5. Click **PUBLISH** on the Toolbar to initiate the process and after the Compilation is complete, click **Publish** in the Compilation window to finalize publication.
6. Sequentially select and delete (**X** in the toolbar) the rows with the solution packages unpublished in the previous step.
7. Click **Save**

Remove the solution items that stored in the database

There are no ideal items (i.e. Generic Inquires, Reports, etc.) that need to be removed.

Acumatica License Requirements

Acumatica Modules

The Advanced Commissions solution requires the following modules to be enabled:

- Financials
- Inventory Control (Requires Order Management) (optional module since Advanced Commissions works with non-stock Inventory items)
- Order Management
- Project Accounting (optional module)

Minimal License Tier

The minimal recommended Acumatica ERP license that shall be applied for the Advanced Commissions solution to function in alignment with license tier restrictions is:

- **S** License Tiers

The above statement is estimated based on the average normal use of the solution and may vary for an individual setup.

Overview of The Business Processes and the Key Use Cases of the Solution

Advanced Commissions

Overview

Advanced Commissions make it possible to create a variety of commission types and split commissions between multiple salespersons and managers. Advanced Commissions customization has a process that is not related to the Accounts Receivable module.

In Advanced Commissions, every transaction is subject to commissions. Commissions are based on the rules defined in the commission plan and can be based on several conditions. Commission plans get assigned to different salespersons or managers, and they, in turn, can be assigned to multiple commission plans.

With the Advanced Commissions flexibility, you can configure virtually any commission calculations that support your company's policies.

Commission Plan

Users can create virtually any configuration and number of plans by using the Commission Plans (CWAC4030) form.

Commission Plans can be defined with Flexible configurations including Plan Type, Pay Out Type, Frequency, Target, Commission Value Type, and Commission Type.

Plan Type: allows you to choose between Flat Rate and Quota. The Flat Rate is applied one time and is based on a single transaction. Quota Plan has the Target field. Therefore, a Quota Plan is based on meeting a sales revenue level or Target and accumulates for each sale until the predefined target is reached. Once the target is met, a bonus payout is created based on the target achieved.

Pay Out Type: allows you to choose between two options: Immediate and On Paid Invoice. For Immediate Type, the commission can be applied at any time according to the selected frequency and regardless of the status of the document, which forms the basis for the commission calculation. For On Paid Invoice, the commission is paid when the invoice is paid

Frequency: contains four options: Bi-Weekly, Monthly, Quarterly, and Yearly. The commissions will be paid out according to the frequency set on the commission plan payout type.

Target: is a field that allows the user to select a Generic Inquiry previously created that selects the data being accumulated to compare with the Minimum Value.

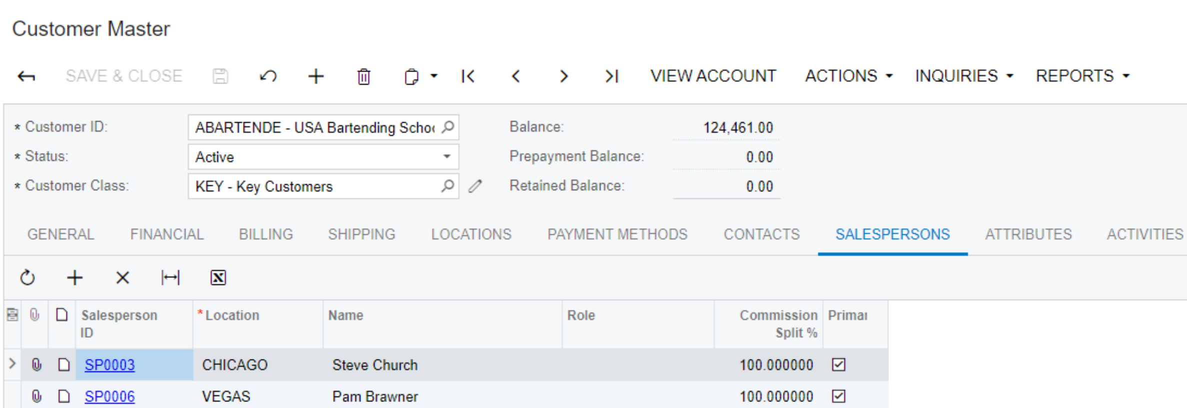
Commission Value Type: contains two options: Expression Builder and Generic Inquiry. Expression Builder is a functionality to build Commission Plan Rules so that Rules can be calculated in a very detailed and complex way. The Expression Builder is a formula to calculate the commission based on the source values and filters. For details on the functions that can be used in the formula, see Formulas in the Acumatica Help Guides. For even more complex calculations, counts, etc., the Acumatica Generic Inquiry tool can be used to query and collect data based on the conditions and parameters defined and displays the query results. A new checkbox field has been added to the Generic Inquiry Form to define which "value" field is going to be returned to the Commission Plan. For more details on configuring a generic inquiry see Creation of Generic Inquiries.

Commission Type: the way the commission will be calculated allows you to choose between two options: Generic Inquiry and Flat Amount. Generic inquiry helps when you need to specify the source and calculation formula in an Inquiry. With the Flat Amount, you can apply just a fixed commission.

Salespersons and Split Commission

After the establishment of the Commission Plan, the next step is to add the plan to specific salespersons or managers. The function will be updated in the Salespersons (AR205000) form.

With Advanced Commissions, a new tab had been added to the Salesperson Form called Commission Plans. The user will need to assign the previously created plans to the Salesperson.



For commission calculations to work properly, the user needs to bind the Salesperson with entities that have been chosen in the rules or the target in a Commission Plan and specify Commission Splits to each Salesperson.

These entities are located on the following levels: Customer, Invoice and memos lines, Sales Order lines, Project Tasks, and Contract Items.

A Salesperson can be defined by Customer Location so that a particular Salesperson(s) receives commissions on a transaction(s) that involve that specific location. Commissions can be split across multiple salespeople per location(s). In all screens where the commission splits are pre-defaulted, Advanced Commissions considers the location of the document to add only the ones that match based on Salesperson by Customer and Location logic.

Commission splits define the appropriate percentage for the specific salesperson or manager. You can also define the “Primary” Salesperson for other types of filters and conditions. For example, for a certain type of plan, two salespersons will split the commission; however, for a quota plan, the full amount is accumulated to the Primary Salesperson only.

If there are additional salespeople that will receive some type of commission on this line, enter that salesperson with a 0% split. This will allow that salesperson to be tagged to the document lines and used in GI Commission Calculations and Conditions. It is important to note that the same Salesperson can be duplicated on multiple lines on the Commission Split Table so that you can specify multiple commission percentages for the same Salesperson.

ⓘ For accumulation of data parameters, the Primary Salesperson is used in Quota Plans, ignoring the Commission Splits

Commission Processing

Commission Processing includes three main steps described below.

Calculate Commissions (Calculated status)

The user will use the Calculate Commissions (CWAC5010) form to select a commission plan and manually process commissions or automate the process using the Acumatica scheduling tools. The process will find all invoices or other entities (depending on the particular Commission plan settings) and calculate the commission based on the commission rules in the plan. Once the commissions have been calculated, they will be created with a new status of *calculated* and appear on the Commissions form (CWAC4020).

Sample steps for the calculation:

1. Access screen (CWAC5010) to calculate Commissions
2. Select one row or multiple rows or all rows (selecting a checkbox in the table header)
3. Use the Process option for selected rows or
4. Use the Process All, and all Commission Plans are processed. Or
5. Use the Acumatica scheduling option to schedule calculations for the Commission Plans.

The Calculated status is by definition an earned commission, and based on the plan, rules or updates may change or move directly to a “To Be Paid” commission. As Commissions Plans can change, or the situation around the Commission Plan can change, for example, the Plan had mistakes in it and had to be changed, the Plan turned out to be out of date for company policy reasons and got deactivated, or other business situations, the user can modify the plan and recalculate the commissions.

Notes:

- As long as the Commission is on a *Calculated* Status, it can be recalculated, which means repeating the Calculation Process
- Recalculated commissions override already calculated commissions that still have a *Calculated* status
- New calculated commissions will have their commissionable amount negative if the invoice type the commission came from is a Credit Memo
- Commissions with an empty status or type will be prevented from being created

Approve Commissions (Approve or Accrued status)

The user will use the Approve Commissions (CWAC5020) form for the next step of Commission Processing, and only commissions with *Calculated* status are displayed in the form.

The user approves commission lines to move the commission to the next status phase defined in the Commission plan, with the ultimate goal of paying the commission to the Salesperson. This is the final process called Pay Commissions.

Based on the Plan Payout Type, when the commission is approved, it will change to one of the following status types: Approved or Accrued. This is based on the plan Payout Type defined in the Commission plan.

- **Pay Out Type** = **On Paid Invoice**:
  1. When the manager approves the commission, the commission status will be changed to “Approved” if the invoice still has a balance remaining on the total invoice. Once the invoice is paid, all the lines for that invoice will change to Accrued status. According to the Frequency setting, the commission can also move to the status of Ready for Payment. There is also the option to change the status or mark the status as Ready for Payment, should the approver decide to pay before the plan definition. Security will define this type of access.
  2. When the manager approves the commission, the commission status will change to “Accrued” if the invoice is paid in full or the balance of the invoice is zero. The commission can also move directly to “Ready for Payment” based on the Frequency setting defined in the Plan.

  Approved and Accrued Commissions cannot be recalculated. If the user recalculates the plan, any commission that is no longer in the calculated status will remain and no longer be removed from the Commissions Ledger. An adjustment can be made for Approved and Accrued Commissions should that need arise (see next section Commission Adjustment).

- **Pay Out Type** = **Immediate**: This payout type assumes the salesperson is due the commission when earned or when the invoice is released in Acumatica. No payment to the invoice is required to move the commission to “Accrued” once approved by the Manager. In this case, the commissions will get the Accrued status immediately after being processed on the Approve Commissions screen. Then based on the Frequency setting, will change the status to Ready for Payment. The Accrued Commissions will automatically get changed to Ready for Payment when the Frequency setting in the Commission Plan from which Commission was generated is met. It is not possible to use Automation Schedules to schedule the status change from Accrued to Ready for Payment before the Frequency Setting allows for this change.

Listed below are clarifications when the Frequency setting activates:

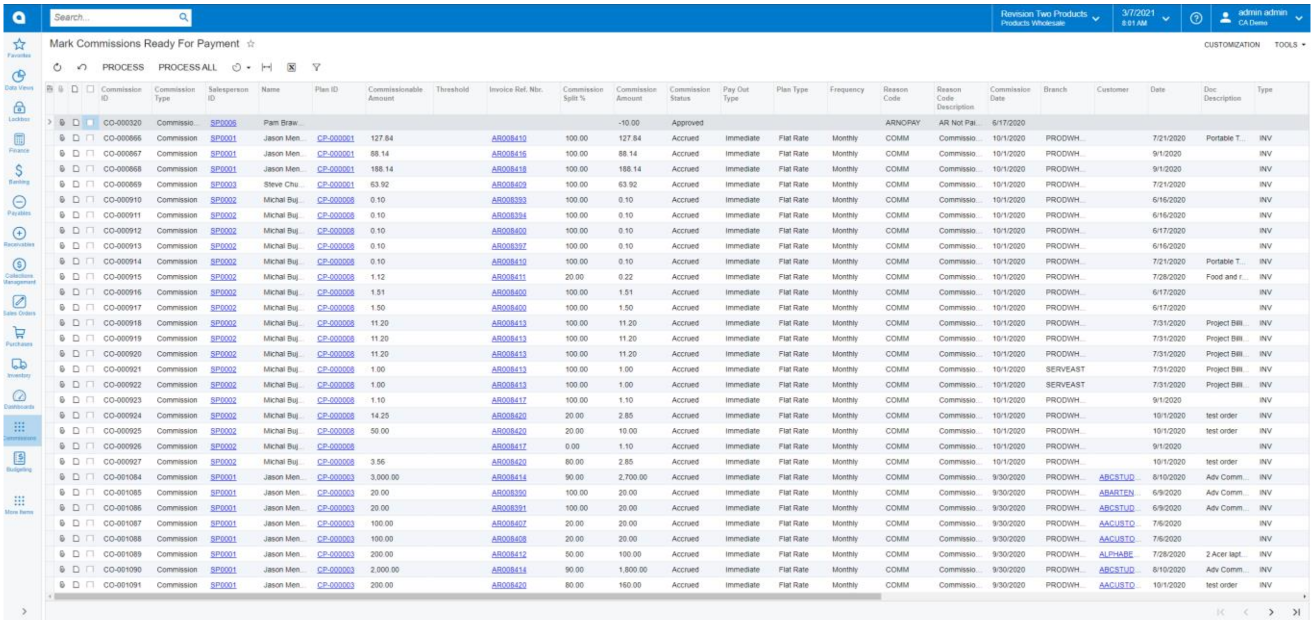
- When Frequency is Bi-Weekly, it automatically changes to Ready for Payment on the first day of the next week (Business Date) after calculated.
- When Frequency is Monthly, it automatically changes to Ready for Payment on the first day of the next month (Business Date) after calculated.
- When Frequency is Quarterly, it automatically changes to Ready for Payment on the first day of the next quarter (Business Date) after calculated.
- When Frequency is Yearly, it automatically changes to Ready for Payment on the first day of the next year (Business Date) after calculated. When a Commission status changes to Accrued *after* the first day of the next Month, Quarter, or Year by its Frequency setting, it immediately changes to Ready for Payment.

Note that when Approving, marking commissions Ready for Payment, and Paying Commissions the system will try to update the commission close period with the related invoice's financial period (if found). Additionally, when publishing the Advanced Commissions Customization Package the system will update the empty commission periods for all commissions that have a related closed invoice.

Mark Commissions Ready for Payment

The user will utilize the Mark Commissions Ready for Payment form to select the commission records that are to be processed for payment. Users can select one, several, or all commission records and process them by making them ready for payment.

The process of marking commissions ready for payment can also be automated using the standard Acumatica scheduling functionality to streamline operations.



Note that when Approving, marking commissions Ready for Payment, and Paying Commissions the system will try to update the commission close period with the related invoice's financial period (if found). Additionally, when publishing the Advanced Commissions Customization Package the system will update the empty commission periods for all commissions that have a related closed invoice.

Pay Commissions (Ready for Payment, Create AP File, and Paid statuses)

Only after commissions were marked as Ready for payment will they appear in the Pay Commissions (CWAC5030) form with Ready for payment status.

To change the status from Ready for payment to Paid, the User can manually change the status or set up an Acumatica Schedule to automate the process.

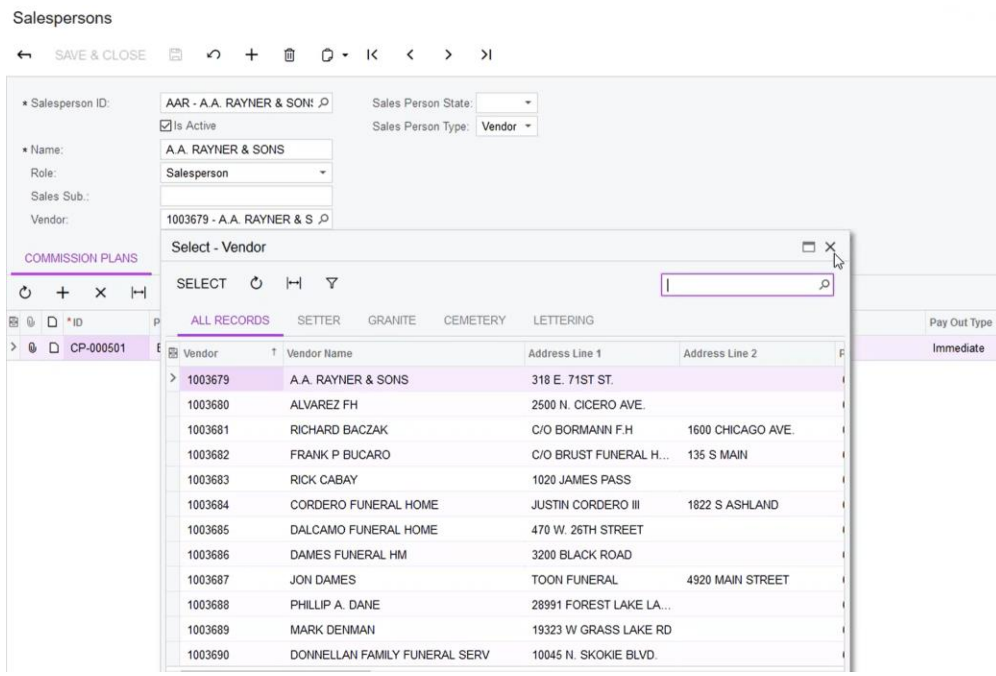
Summary:

Status	**Summary**
Calculated	• A Commission Ledger record will be created and tagged with a *Calculated* status when the **Calculate Commission** process is initiated Form (CWAC5010). The **Calculate Commissions** can be processed manually or automatically by setting up an Automation Schedule. Form (SM205020). • Once the commissions have been *Calculated*, they will appear on the **Commissions** Form (CWAC4020) with a new status of ***Calculated***. • As long as a commission record has a ***Calculated*** status, the **Calculate Commissions** Process will remove the old Commissions on the **Commission** Form (CWAC4020) that still have a ***Calculated*** Status and create brand new Commission records with a ***Calculated*** Status. All other Commission records on the **Commission** Form will not change by the **Calculate Commissions** process.
Approved	• The Commissions will be moved to the ***Approved*** status with the following Actions: o The user manually changes the Commission Status to ***Approved*** on the **Commissions** Form (CWAC4020) o The user manually runs the **Approve Commissions** process Form **CWAC5020.** o A user sets up an Acumatica Automation Schedule for the Approve Commissions Form **CWAC5020.** o User Security Rules apply. • Based on the Commission Plan **Payout Type** Rules and the status of the invoice, the commission **may skip** the **Approved** status and go directly to **Accrued**. Accrued <u>*assumes*</u> **Approved,** but the commission is moved one step further. o If the Payout Type is **On Paid Invoice *and*** the invoice is <u>still outstanding</u>, the approval process will update the commission status to ***Approved***. The status remains in the Approved status until the invoice is paid in full. o If the Payout Type is **On Paid Invoice *and*** the invoice has a <u>zero balance</u>, the approval process will update the commission status to ***Accrued***. The approval status is assumed and skipped. o If the Payout Type is **Immediate,** the commission status will be set to ***Accrued.*** The approval status is assumed and skipped. • Approved Commissions cannot be recalculated, but an adjustment can be made. A Commission Adjustment is a Commission record added manually by the user to add or subtract to their Commissions generated by the System if the need arises (see next section Commission Adjustment)
Accrued	• The Commissions will be moved to the ***Accrued*** status with the following Actions: o The user manually changes the Commission Status to ***Accrued*** on the **Commissions** Form (CWAC4020) o The user manually runs the **Approve Commissions** process Form **CWAC5020.** o A user sets up an Acumatica Automation Schedule for the Approve Commissions Form **CWAC5020.** o User Security Rules apply.

	• Based on the Commission Plan **Payout Type** Rules and the status of the invoice, the commission **may skip** the **Approved** status and go directly to **Accrued**. Accrued *assumes* **Approved,** but the commission is moved 1 step further. ○ If the Payout Type is **On Paid Invoice *and*** the invoice is still outstanding, the approval process will update the commission status to ***Approved***. The status remains in the Approved status until the invoice is paid in full. ○ If the Payout Type is **On Paid Invoice *and*** the invoice has a zero balance, the approval process will update the commission status to ***Accrued***. The approval status is assumed and skipped. ○ If the Payout Type is **Immediate,** the commission status will be set to ***Accrued.*** The approval status is assumed and skipped. • Based on the Commission Plan **Frequency** Rules, the commission will remain in the ***Accrued*** status until the Frequency rules are met. • ***Accrued*** Commissions cannot be recalculated, but an adjustment can be made. A Commission Adjustment is a Commission record added manually by the user to add or subtract to their Commissions generated by the System if the need arises (see next section Commission Adjustment)
Ready for payment	• The Commissions will be moved to the ***Ready for Payment*** status with the following Actions: ○ The user manually changes the Commission Status to ***Ready for Payment*** on the **Commissions** Form (CWAC4020) ○ The user manually runs the **Process Commissions** process Form **CWAC5040.** ○ A user sets up an Acumatica Automation Schedule for the **Process Commissions** process Form **CWAC5040.** ○ User Security Rules apply. • Based on the Commission Plan **Frequency** Rules, the commission will remain in the ***Accrued*** status until the Frequency rules are met. Once the Frequency is met, the Commission status will move to ***Ready for Payment***. • ***Ready for Payment*** Commissions cannot be recalculated, but an adjustment can be made. A Commission Adjustment is a Commission record added manually by the user to add or subtract to their Commissions generated by the System if the need arises (see next section Commission Adjustment)
Paid	• The Commissions will be moved to the ***Paid*** status with the following Actions: ○ The user manually changes the Commission Status to ***Paid*** on the **Commissions** Form (CWAC4020) ○ The user manually runs the **Pay Commissions** process Form **CWAC5030.** ○ A user sets up an Acumatica Automation Schedule for the **Process Commissions** process Form **CWAC5030.** ○ User Security Rules apply. • ***Paid*** Commissions cannot be recalculated, but an adjustment can be made. A Commission Adjustment is a Commission record added manually by the user to add or subtract to their Commissions generated by the System if the need arises (see next section Commission Adjustment) • Paid is the final status in the commission processing

The Advanced Commission module can automatically create AP Bills for approved commissions that are to be paid to external Salespeople. The process flow for the auto-creation of AP Bills for approved commissions is as follows:

- Assign a Vendor record to the Salesperson ID created for each salesperson that needs to be paid via an AP Bill



- Calculate commissions as outlined above
- Approve the commission as outlined above
- Mark commissions as “Ready for Payment”

Commissions ☆

CUSTOMIZATION TOOLS

ACTIONS

Commission Adjustment
Mark Ready for Payment
View Adjustment

Drag column

		Salesperson ID	Salesperson Name	Plan ID	Commissionable Amount	Threshold	Invoice Ref. Nbr.	Commission Split %	Commission Amount
CO-000047	Commission	SP0001	Jason Mendenhall	CP-000003	3,000.00		AR008392	90.00	2,700.00
CO-000053	Commission	SP0001	Jason Mendenhall	CP-000003	1,500.00		AR008392	90.00	1,350.00
CO-000056	Commission	SP0001	Jason Mendenhall	CP-000003	1,000.00		AR008392	90.00	900.00
CO-000308	Commission	SP0001	Jason Mendenhall	CP-000004	11.74		AR008393	100.00	11.74
CO-000309	Commission	SP0001	Jason Mendenhall	CP-000004	11.74		AR008394	100.00	11.74
CO-000310	Commission	SP0001	Jason Mendenhall	CP-000004	10.00		AR008394	100.00	10.00
CO-000311	Commission	SP0001	Jason Mendenhall	CP-000004	20.00		AR008397	100.00	20.00
CO-000312	Commission	SP0001	Jason Mendenhall	CP-000004	10.00		AR008395	60.00	6.00
CO-000313	Commission	SP0001	Jason Mendenhall	CP-000004	20.00		AR008396	60.00	12.00
CO-000314	Commission	SP0002	Michal Bujacek	CP-000004	10.00		AR008395	40.00	4.00
CO-000315	Commission	SP0002	Michal Bujacek	CP-000004	20.00		AR008396	40.00	8.00
CO-000316	Commission	SP0006	Pam Brawner	CP-000005	11.74		AR008398	100.00	11.74
CO-000317	Commission	SP0006	Pam Brawner	CP-000005	10.00		AR008398	100.00	10.00
CO-000318	Commission	SP0001	Jason Mendenhall	CP-000004	20.00		AR008399	99.00	19.80
CO-000319	Commission	SP0002	Michal Bujacek	CP-000004	20.00		AR008399	1.00	0.20
CO-000320	Commission Adjustment	SP0006	Pam Brawner						-10.00
CO-000323	Commission	SP0001	Jason Mendenhall	CP-000004	20.00		AR008400	100.00	20.00

Bills and Adjustments ☆

CUSTOMIZATION

Type: All | Status: All | Date: All

Type	Reference Nbr.	Status	Date	Post Period	Vendor	Vendor Name	Description	Vendor Ref.	Amount	Currency
Bill	AP000340	On Hold	4/29/2020	04-2020	1003768	ALLSTAFF	Commission Payment Import	04/29/2020 10:30:17.0671...	2.64	USD
Bill	AP000339	On Hold	4/29/2020	04-2020	1003641	AHLGRIM FAMILY-LAKE ZURIK	Commission Payment Import	04/29/2020 10:30:16.7546...	3.98	USD
Bill	AP000338	On Hold	4/29/2020	04-2020	1003598	RALPH J. WITTICH-RILEY-FRE...	Commission Payment Import	04/29/2020 10:30:16.2389...	3.94	USD
Bill	AP000320	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,...		0320-143940	453.76	USD
Bill	AP000319	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,...		0320-143856	1,021.60	USD
Bill	AP000318	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,...		0320-144353	623.61	USD
Bill	AP000317	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,...		0320-143806	1,039.35	USD
Bill	AP000316	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,...		0320-143800	1,133.14	USD
Bill	AP000315	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,...		0220-143541	59.99	USD
Bill	AP000314	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,...		0220-143540	178.29	USD
Bill	AP000313	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,...		0220-143411	164.78	USD
Bill	AP000312	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,...		0220-143326	1,999.27	USD
Bill	AP000311	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,...		0220-143325	1,483.82	USD
Bill	AP000310	Open	4/22/2020	04-2020	1003555	WESTLAWN CEMETERY		LEBOVITZ	850.00	USD
Bill	AP000309	Open	4/22/2020	04-2020	1003839	GRACELAND - CHICAGO		LIFSCHITZ	450.00	USD
Bill	AP000308	Open	4/22/2020	04-2020	1003766	ALL SAINTS CEMETERY-DESPL		DIVENERE	310.00	USD
Bill	AP000307	Open	4/22/2020	04-2020	1003883	MT CARMEL CEMETERY-HILLS...		CALABRESE	155.00	USD
Bill	AP000306	Open	4/22/2020	04-2020	1003761	ACACIA PARK CEMETERY		SANTIAGO	695.00	USD
Bill	AP000305	Open	4/22/2020	04-2020	1003766	ALL SAINTS CEMETERY-DESPL		DIZONNO	310.00	USD
Bill	AP000304	Open	4/22/2020	04-2020	1003766	ALL SAINTS CEMETERY-DESPL		PESCH	620.00	USD

Note that when approving, marking commissions Ready for Payment, and Paying Commissions the system will try to update the commission close period with the related invoice's financial period (if found). Additionally, when publishing the Advanced Commissions Customization Package, the system will update the empty commission periods for all commissions that have a related closed invoice.

Advanced Commissions will automatically create the associated AP Bills for the commission line items that were selected in the **Commissions** window. The **Bills and Adjustments** window will show the AP Bills that have been created for commissions to be paid and the line items are marked with a description of "Commission Payment Import."

A single Vendor Bill per document type will be created for each Salesperson that is processed. For example, a Vendor Bill will be created for all positive commissions for a given Salesperson and a Debit Adjustment will be created for all negative commission amounts for a given salesperson.

The following Commission workflow diagram describes all phases of Commission processing. A larger copy of the diagram is shown on the next page as well.

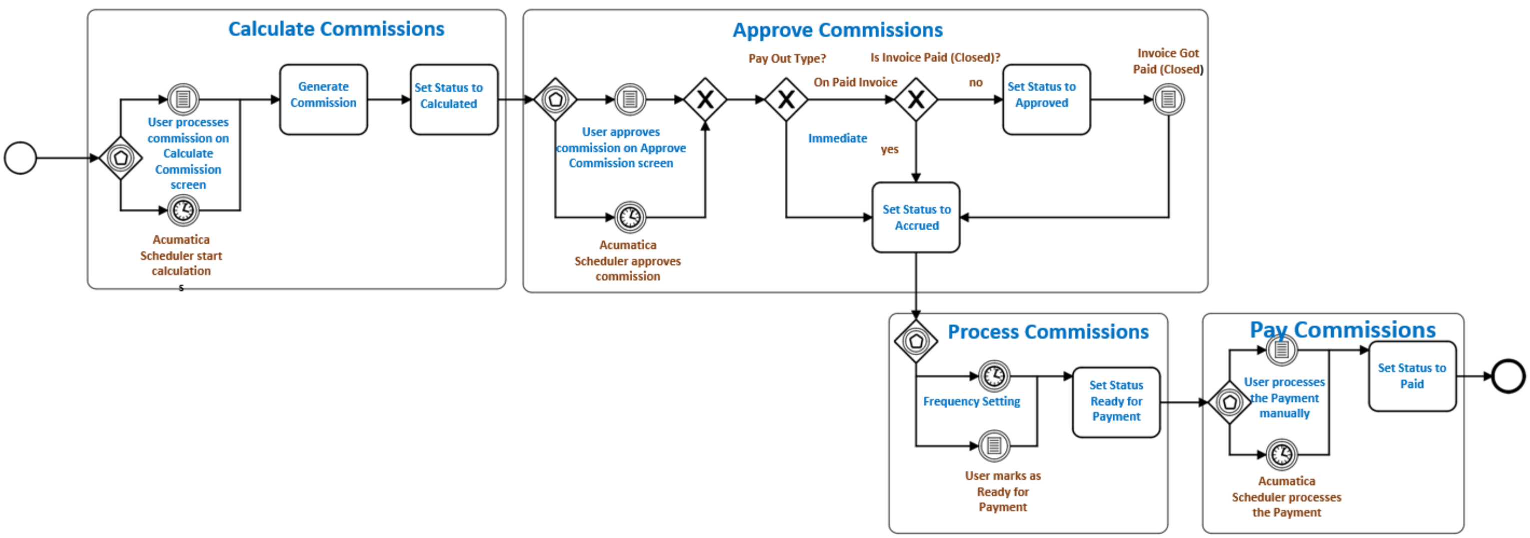
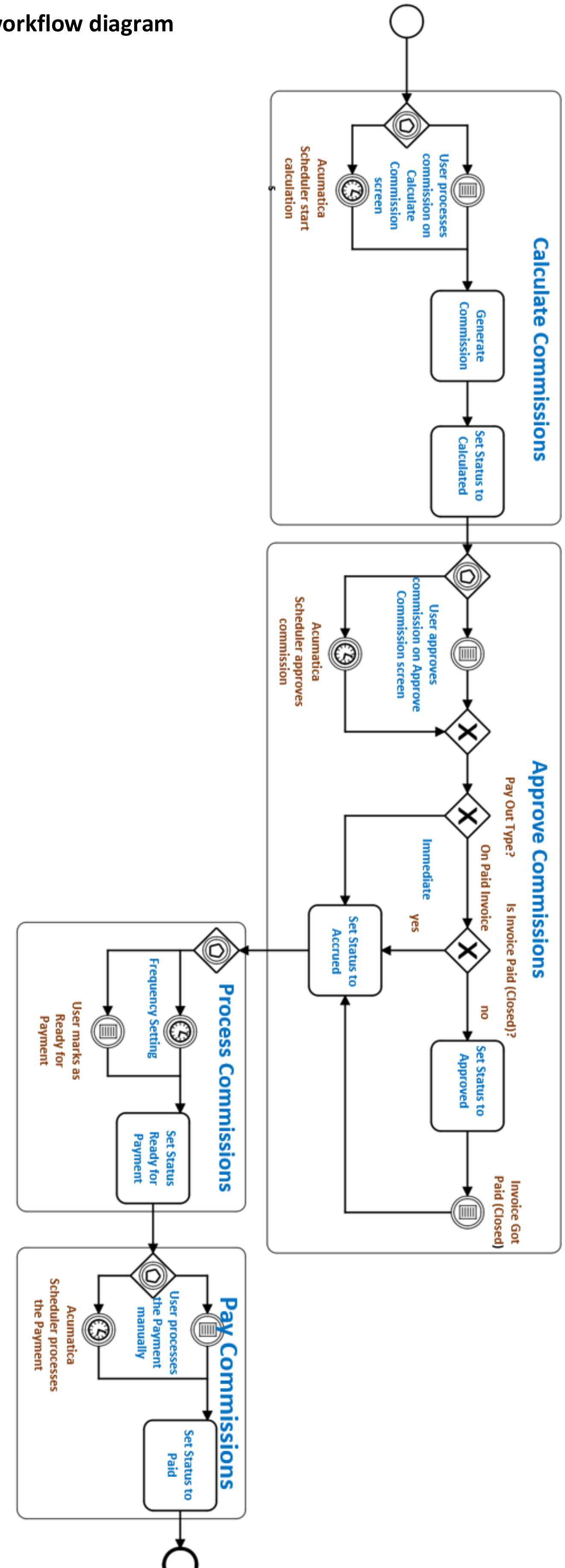


Figure 1 Commission workflow diagram



Commission Adjustment

A Commission Adjustment is a Commission record added manually by the user to add or subtract to their Commissions generated by the System. Commission adjustments are not directly created based on a specific Acumatica document but are "one-off" adjustments tied to a specific Salesperson. For example, a subjective bonus may be added to the Salesperson commission ledger due to a very happy customer belonging to the salesperson. An adjustment requires a Salesperson and Reason Code but can also be tied to a specific Customer, Invoice, Project, etc., and by "tagging" it to a specific Salesperson, Customer, Invoice, Project, etc., users can, for example, create any type of report, or query and link all commission calculations to a specific invoice.

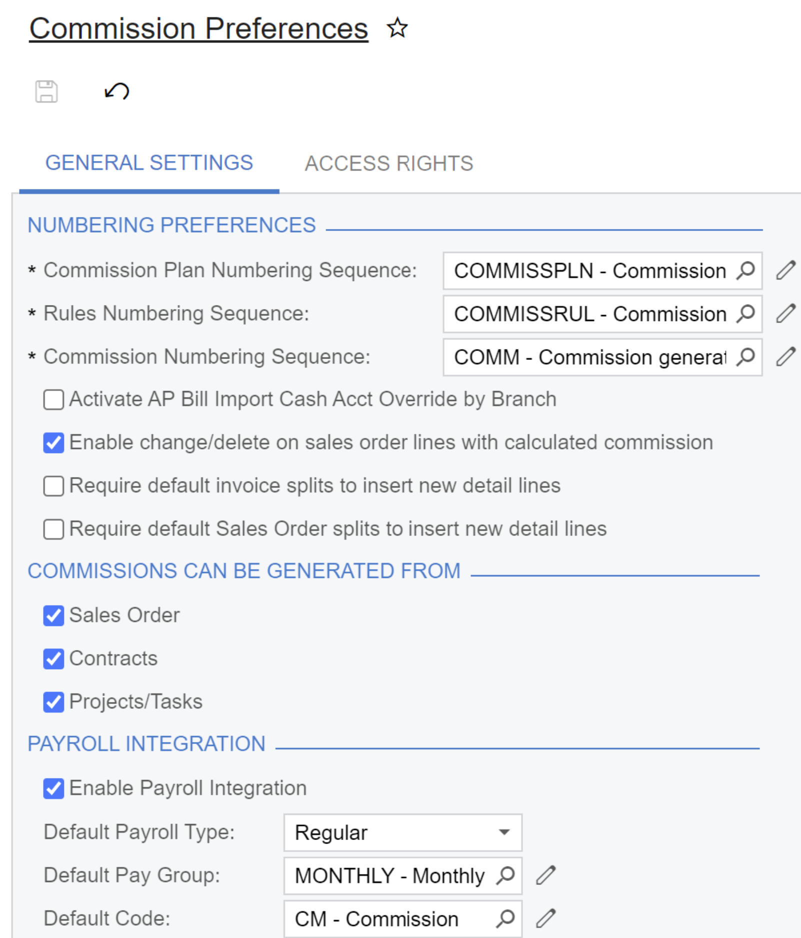
The Adjustment screen requires the user to select specific "Reason Codes," which are user-definable but also provide the necessary information for reporting and history review.

Commission Adjustments have the same statuses as Commissions and can be processed similarly and presented in the same reports as system-calculated commissions allowing the salesperson to view all commissions in one place. Since the Commission Adjustment is not created by a Commission Plan and therefore does not have a Frequency or Payout type, their status will not change automatically from Approved to Accrued and from Accrued to Ready for Payment. Instead, the user will define the current status of the Adjustment and then move it through different statuses as needed. Unlike the system-generated Commissions, Adjustments can be edited and deleted until their status is set to Paid.

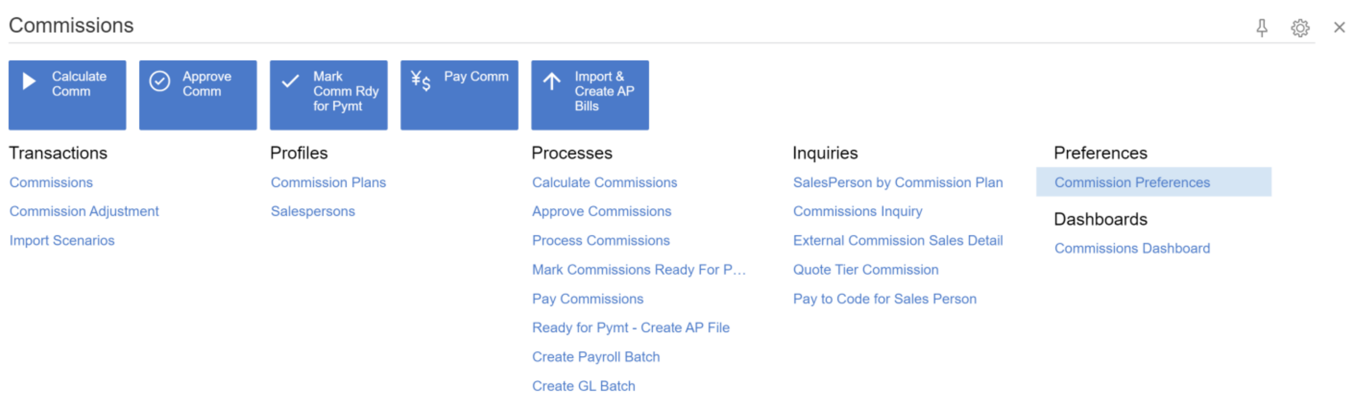
Commission Integration to Acumatica Payroll

The Advanced Commission module can automatically create a Payroll batch or add commissions to an existing Payroll batch in the Acumatica Payroll module for approved commissions that are to be paid to internal Salespeople. Commissions that have been marked Ready for Payment can be selected and migrated over to the Acumatica Payroll module. The process flow for the auto-creation of payroll transactions for approved commissions is as follows:

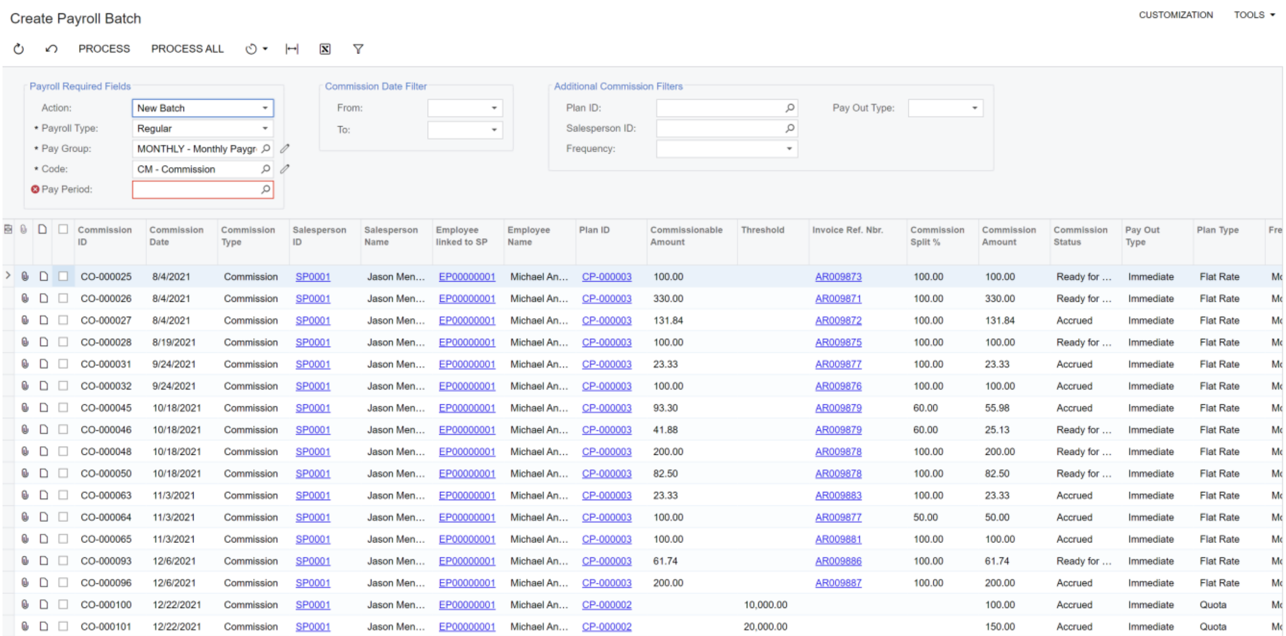
- Select **Enable Payroll Integration** on the **Commission Preferences** screen as part of the Advanced Commissions module setup.
- Select either Regular or Special for the Default Payroll Type, with Regular to include the selected commissions as part of the normal payroll processing cycle or Special to process commissions in a one-off manner (i.e. approved commissions were missed during the normal payroll cycle and you want to pay the Salesperson(s) immediately).
- Select the Default Pay Group from those that have been defined as part of the Payroll setup process.
- Select a Default Code for the commission pay type of the commissions to be migrated to the Payroll module.



- When you are ready to transfer the commissions to Payroll, select **Create Payroll Batch** (CWAC5060) on the Commissions home page

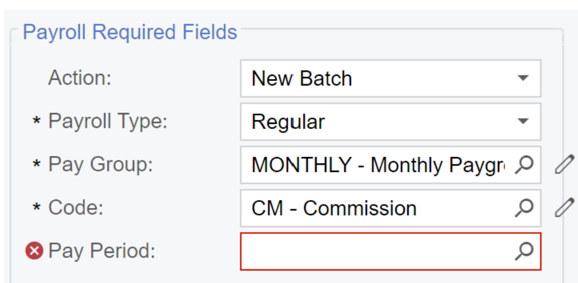


- **Create Payroll Batch** screen enables you to select one or more approved commissions that are ready for payment and transfer them to either a new or an existing Payroll batch.

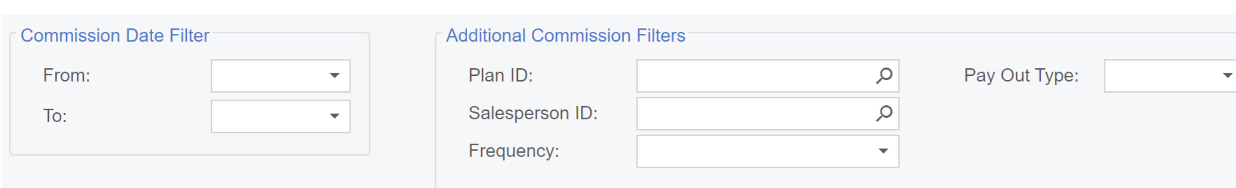


Commission ID	Commission Date	Commission Type	Salesperson ID	Salesperson Name	Employee linked to SP	Employee Name	Plan ID	Commissionable Amount	Threshold	Invoice Ref. Nbr.	Commission Split %	Commission Amount	Commission Status	Pay Out Type	Plan Type	Fre
CO-000025	8/4/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	100.00		AR009873	100.00	100.00	Ready for ...	Immediate	Flat Rate	Mo
CO-000026	8/4/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	330.00		AR009871	100.00	330.00	Ready for ...	Immediate	Flat Rate	Mo
CO-000027	8/4/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	131.84		AR009872	100.00	131.84	Accrued	Immediate	Flat Rate	Mo
CO-000028	8/19/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	100.00		AR009875	100.00	100.00	Ready for ...	Immediate	Flat Rate	Mo
CO-000031	9/24/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	23.33		AR009877	100.00	23.33	Accrued	Immediate	Flat Rate	Mo
CO-000032	9/24/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	100.00		AR009876	100.00	100.00	Accrued	Immediate	Flat Rate	Mo
CO-000045	10/18/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	93.30		AR009879	60.00	55.98	Accrued	Immediate	Flat Rate	Mo
CO-000046	10/18/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	41.88		AR009879	60.00	25.13	Ready for ...	Immediate	Flat Rate	Mo
CO-000048	10/18/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	200.00		AR009878	100.00	200.00	Ready for ...	Immediate	Flat Rate	Mo
CO-000050	10/18/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	82.50		AR009878	100.00	82.50	Ready for ...	Immediate	Flat Rate	Mo
CO-000063	11/3/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	23.33		AR009883	100.00	23.33	Accrued	Immediate	Flat Rate	Mo
CO-000064	11/3/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	100.00		AR009877	50.00	50.00	Accrued	Immediate	Flat Rate	Mo
CO-000065	11/3/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	100.00		AR009881	100.00	100.00	Accrued	Immediate	Flat Rate	Mo
CO-000093	12/6/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	61.74		AR009886	100.00	61.74	Ready for ...	Immediate	Flat Rate	Mo
CO-000096	12/6/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000003	200.00		AR009887	100.00	200.00	Accrued	Immediate	Flat Rate	Mo
CO-000100	12/22/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000002		10,000.00			100.00	Accrued	Immediate	Quota	Mo
CO-000101	12/22/2021	Commission	SP0001	Jason Men...	EP00000001	Michael An...	CP-000002		20,000.00			150.00	Accrued	Immediate	Quota	Mo

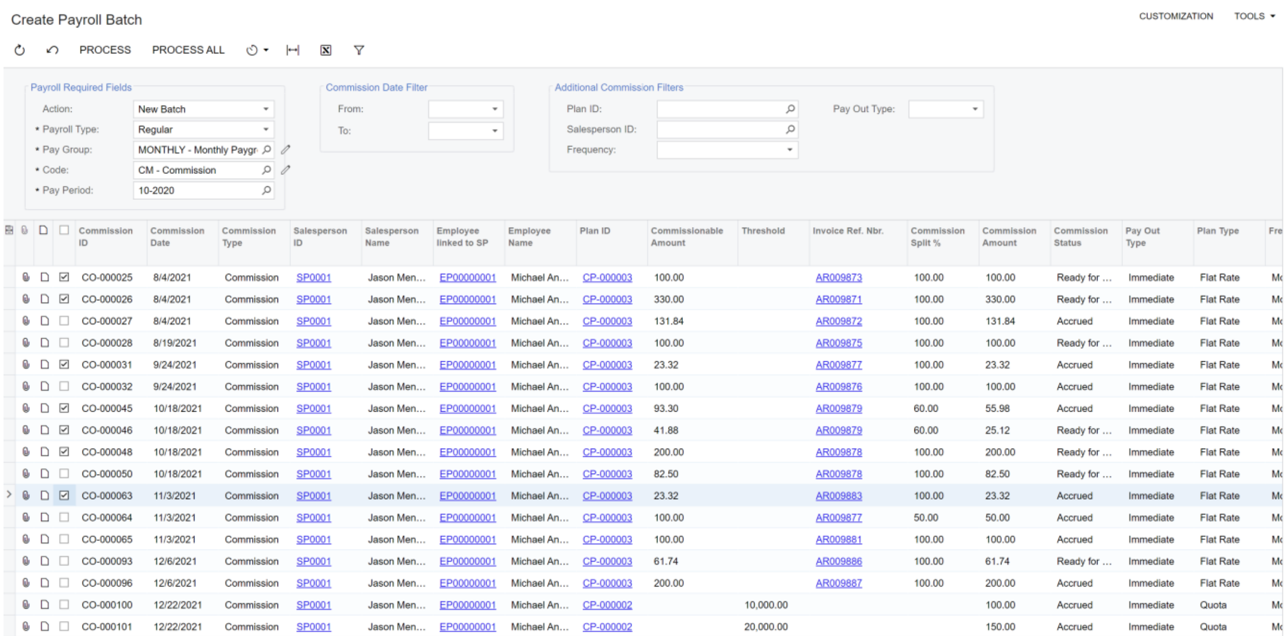
- If you select the Action to create a New Batch, then Advanced Commissions will default in the Payroll Type, Pay Group, and Code that had been defined as part of the Enable Payroll Integration setup on the Commission Preferences screen.
  - Users can change the defaults and select a different Payroll Type, Pay Group, and/or Code.
  - Pay Period must also be selected from the periods that have been defined as part of the Payroll module setup process.



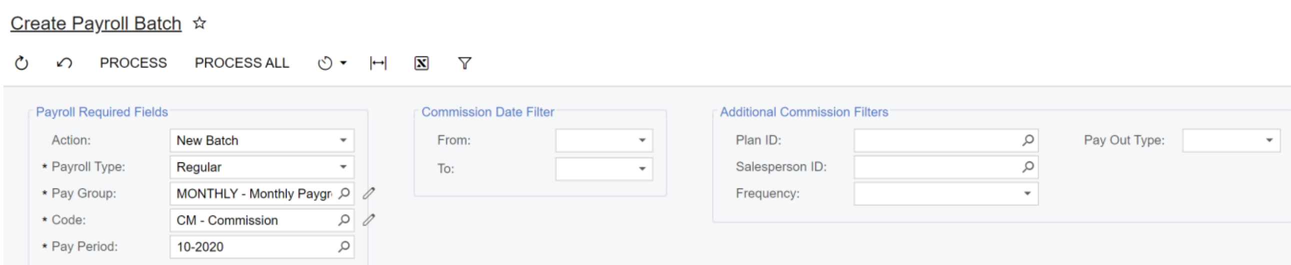
- Several optional filters are provided on the Create Payroll Batch screen to enable the user to narrow down the commissions to be selected by date, Plan ID, Salesperson ID, Frequency, or Pay Out Type.



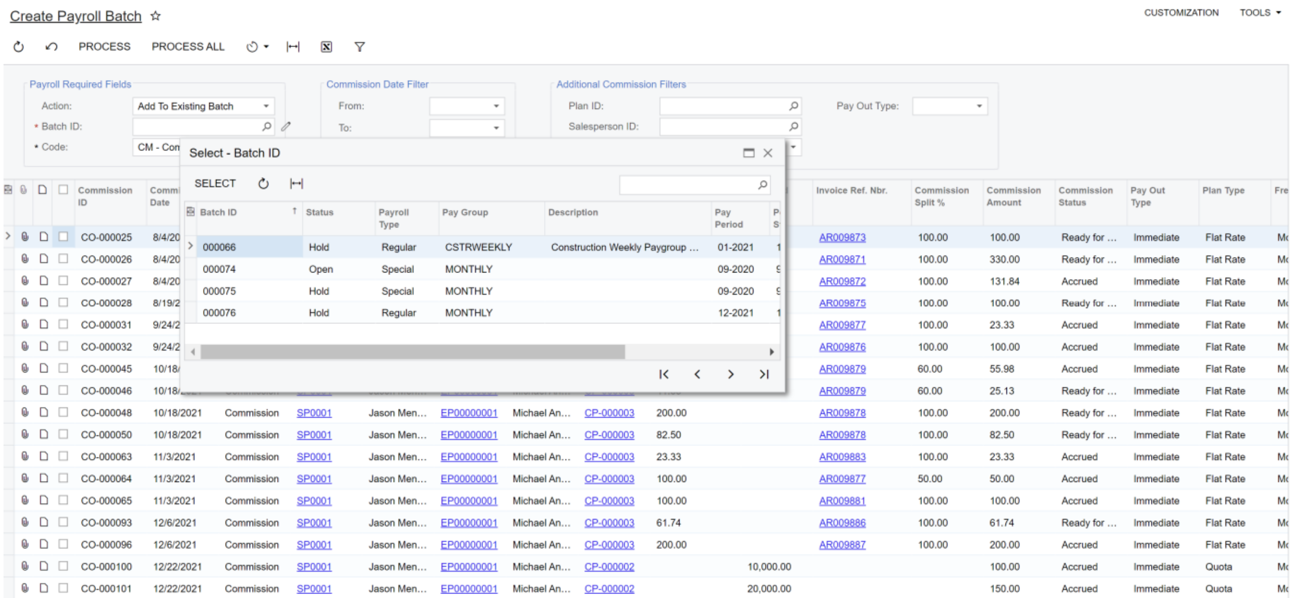
- Users can select one or more of the commissions available and Process them as part of the Payroll batch transfer process.



- Or the user can select Process All and all of the available commissions will be transferred to the Payroll batch.



- Creation of the Payroll batch can also be scheduled utilizing the standard Acumatica scheduling functionality.
- Instead of creating a new Payroll batch as outlined above, the user can instead select the Action to Add To Existing Batch so that the commission transactions will be added to an existing Payroll batch in the system

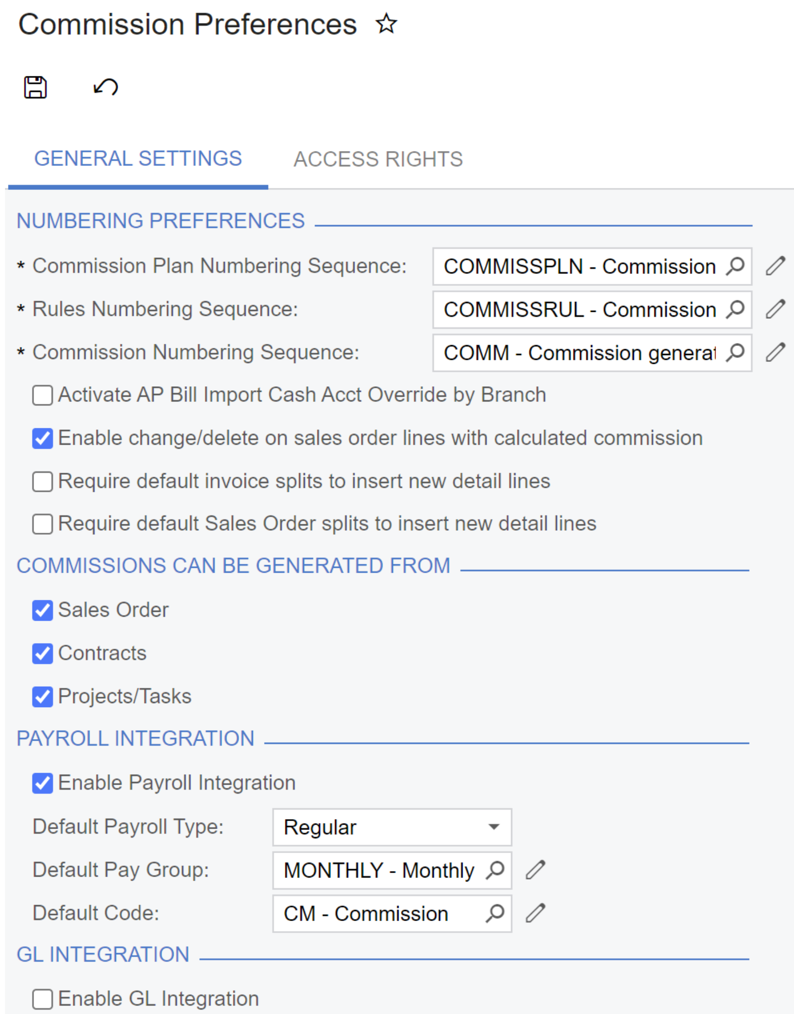


- Select the appropriate Payroll batch and either accept the default Code that came from the Commission Preferences default or select a new Code.
- Process or schedule the process as outlined above to complete the workflow.

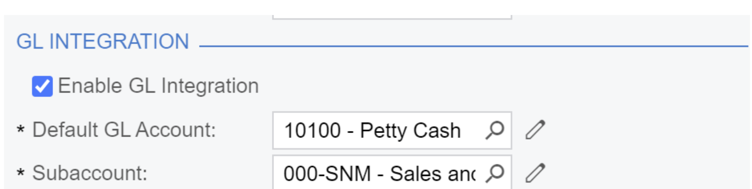
Commission Accrual GL Batch Creation

The Advanced Commission module can automatically create a General Ledger (GL) auto-reversing batch for commissions that have been marked as 'Allowed' (as selected via Commission Preferences) but not paid out either via Payables or Acumatica Payroll. The process flow for the auto-creation of an accrued GL auto-reversing batch is as follows:

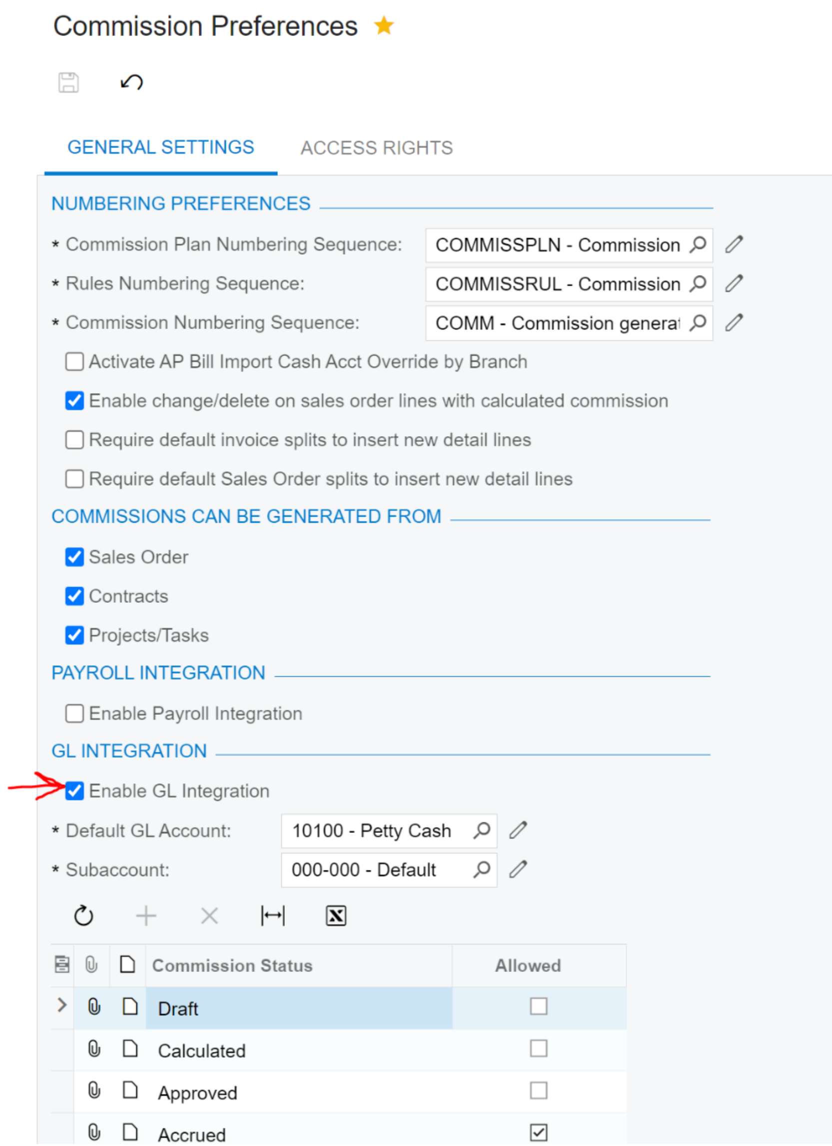
- Select **Enable GL Batch** on the Commission Preferences screen.



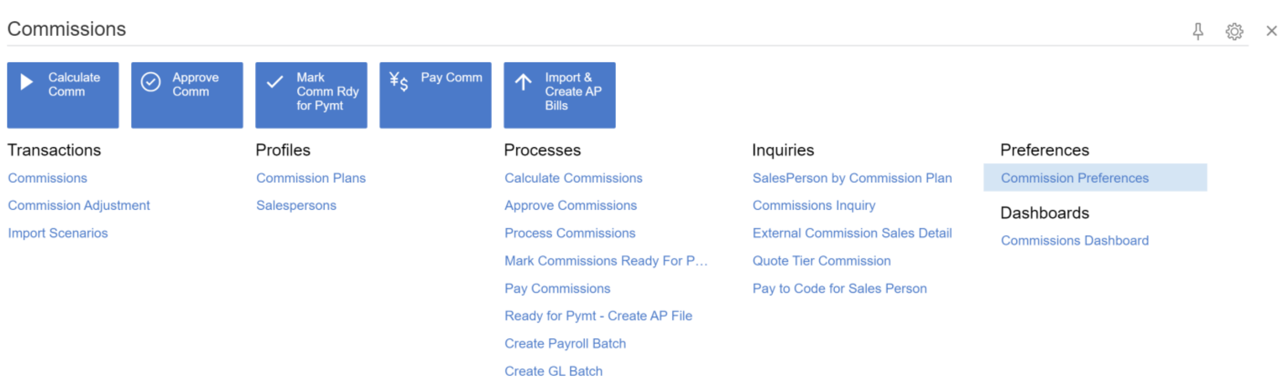
- Select a Default GL Account for the batch to be created from the list of GL accounts that have been defined in the system.
- Select a Subaccount for the batch to be created from the list of Subaccounts that have been defined in the system.



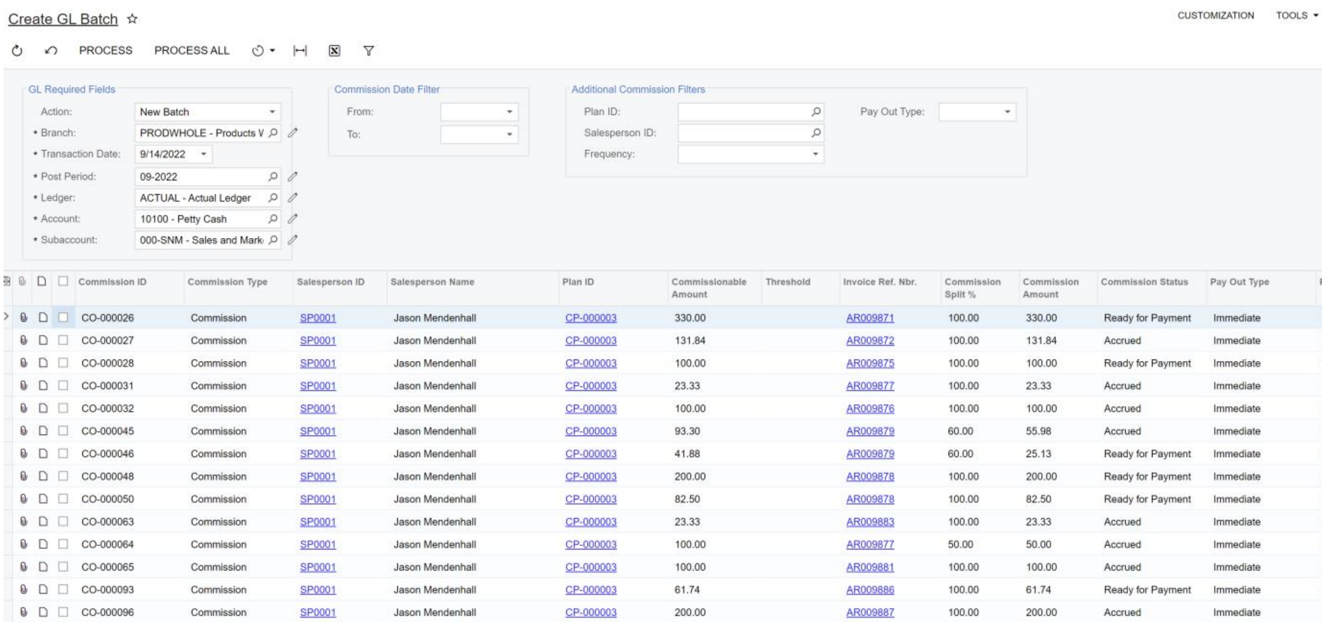
- Select which Commission Status values can be made available for inclusion in the GL accrual batch. Only the Commission Status line items that are marked as Allowed on the Commission Preferences screen will be visible in the Create GL Batch screen.



- When you are ready to create the commission accrual GL batch, select **Create GL Batch** (CWAC5060) on the Commissions home page.



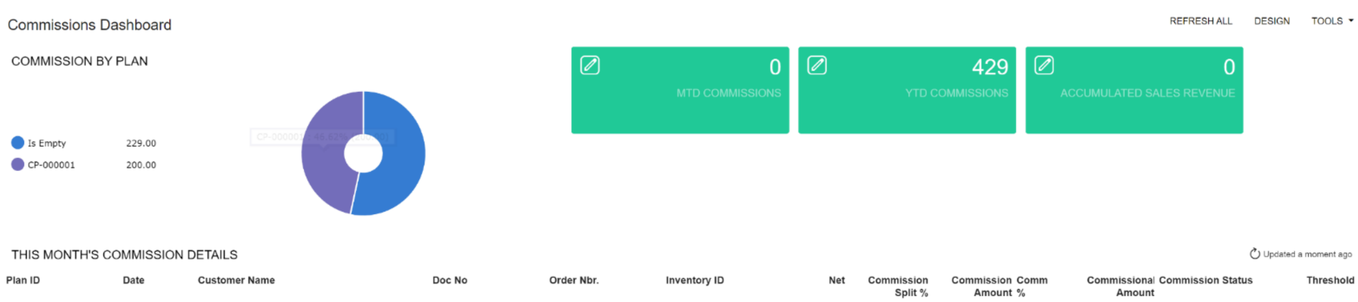
- **Creating a GL Batch** screen enables you to select one or more ‘allowed’ commissions (as selected via Commission Preferences) that are available to be included in the accrued GL batch.



Commission ID	Commission Type	Salesperson ID	Salesperson Name	Plan ID	Commissionable Amount	Threshold	Invoice Ref. Nbr.	Commission Split %	Commission Amount	Commission Status	Pay Out Type
CO-000026	Commission	SP0001	Jason Mendenhall	CP-000003	330.00		AR009871	100.00	330.00	Ready for Payment	Immediate
CO-000027	Commission	SP0001	Jason Mendenhall	CP-000003	131.84		AR009872	100.00	131.84	Accrued	Immediate
CO-000028	Commission	SP0001	Jason Mendenhall	CP-000003	100.00		AR009875	100.00	100.00	Ready for Payment	Immediate
CO-000031	Commission	SP0001	Jason Mendenhall	CP-000003	23.33		AR009877	100.00	23.33	Accrued	Immediate
CO-000032	Commission	SP0001	Jason Mendenhall	CP-000003	100.00		AR009876	100.00	100.00	Accrued	Immediate
CO-000045	Commission	SP0001	Jason Mendenhall	CP-000003	93.30		AR009879	60.00	55.98	Accrued	Immediate
CO-000046	Commission	SP0001	Jason Mendenhall	CP-000003	41.88		AR009879	60.00	25.13	Ready for Payment	Immediate
CO-000048	Commission	SP0001	Jason Mendenhall	CP-000003	200.00		AR009878	100.00	200.00	Ready for Payment	Immediate
CO-000050	Commission	SP0001	Jason Mendenhall	CP-000003	82.50		AR009878	100.00	82.50	Ready for Payment	Immediate
CO-000063	Commission	SP0001	Jason Mendenhall	CP-000003	23.33		AR009883	100.00	23.33	Accrued	Immediate
CO-000064	Commission	SP0001	Jason Mendenhall	CP-000003	100.00		AR009877	50.00	50.00	Accrued	Immediate
CO-000065	Commission	SP0001	Jason Mendenhall	CP-000003	100.00		AR009881	100.00	100.00	Accrued	Immediate
CO-000093	Commission	SP0001	Jason Mendenhall	CP-000003	61.74		AR009886	100.00	61.74	Ready for Payment	Immediate
CO-000096	Commission	SP0001	Jason Mendenhall	CP-000003	200.00		AR009887	100.00	200.00	Accrued	Immediate

Commission Dashboards

The Advanced Commission dashboard that ships with the module contains five widgets that are filtered by the logged user so that salespersons can only see their commission data, while a sales manager could see the commission data for themselves and for the team that reports to them.

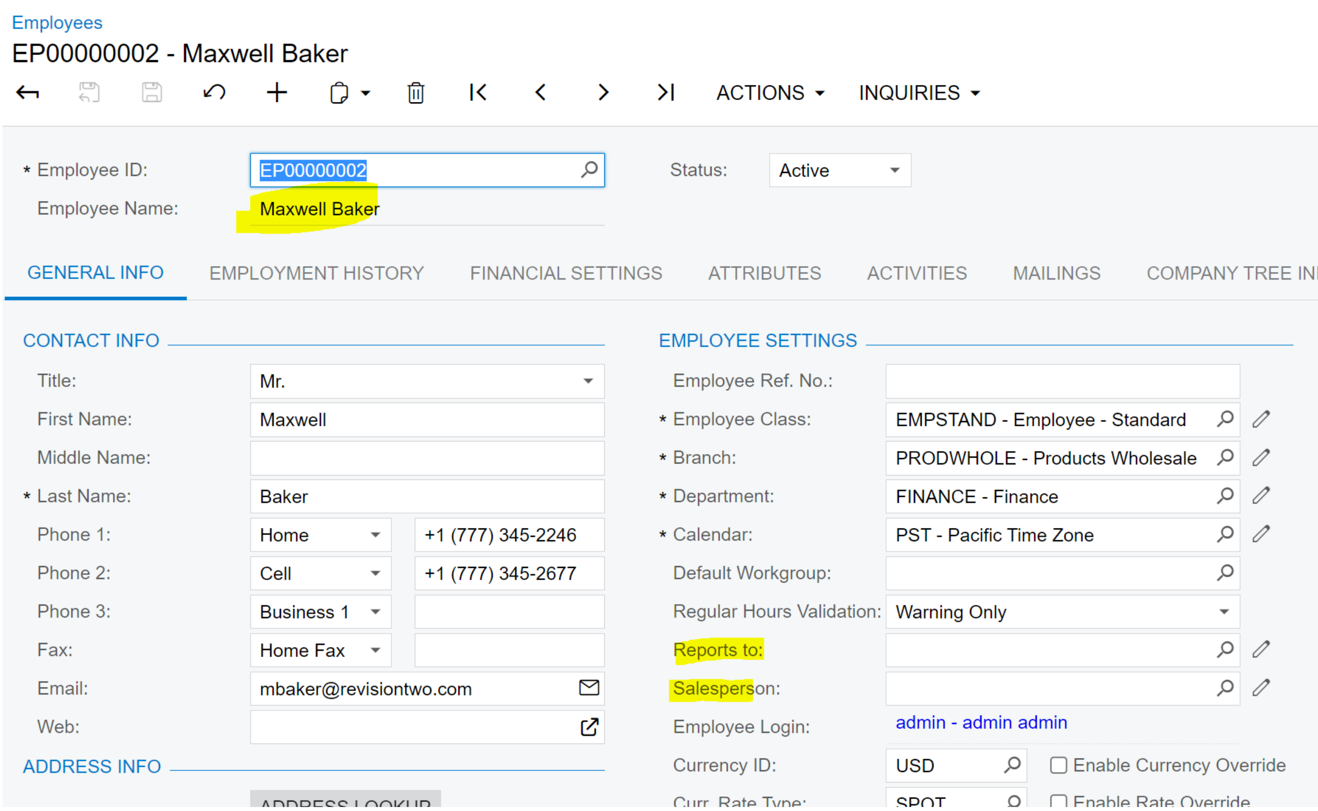


The **Commission Widgets** that are controlled by the logged user include the following:

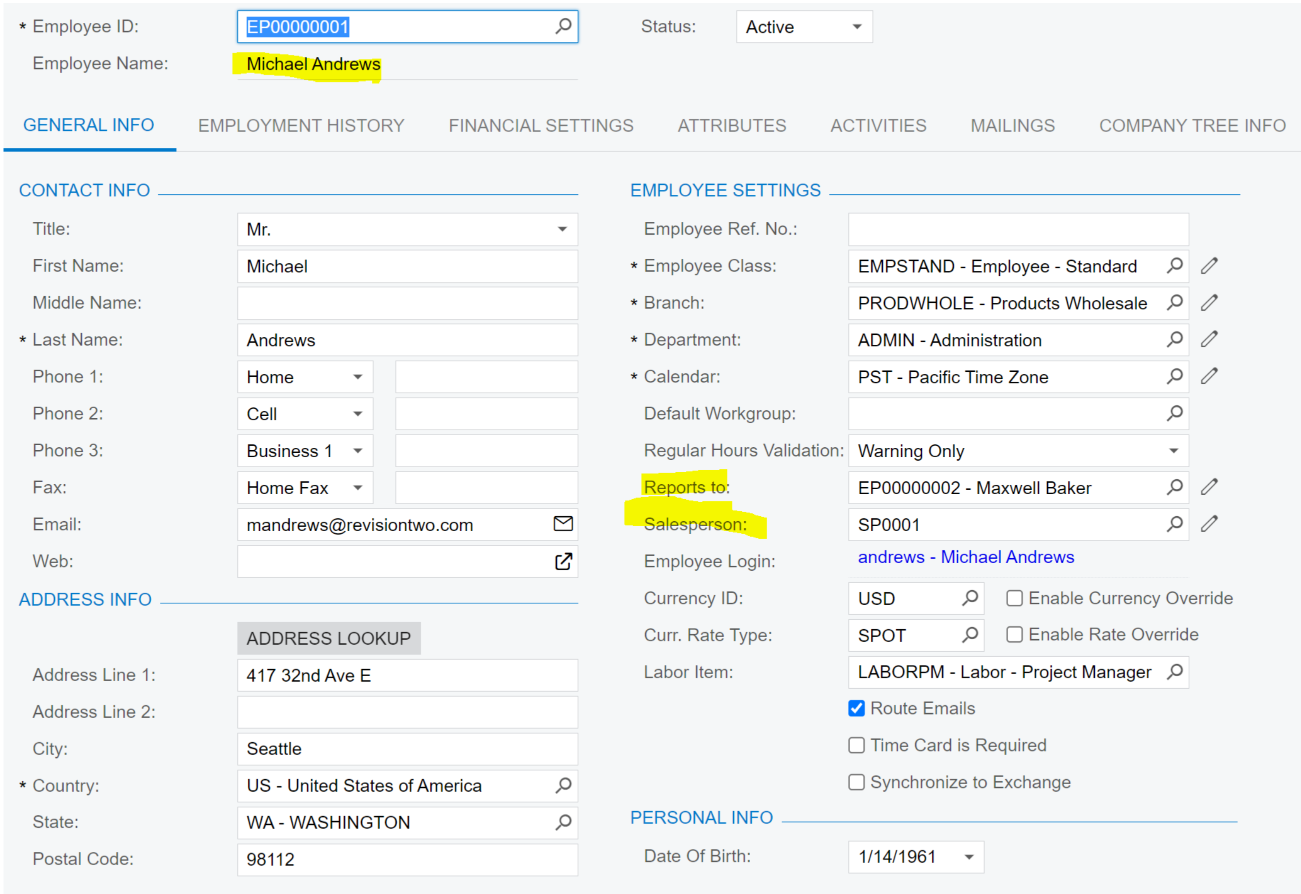
- Commission by Plan
- This Month’s Commission Details
- MTD (Month to Date) Commissions
- YTD (Year to Date) Commissions
- Accumulated Sales Revenue

The **Commission Widgets** require the salespeople and sales manager roles to be configured correctly utilizing the **Employee Master** screen. An example configuration is outlined as follows:

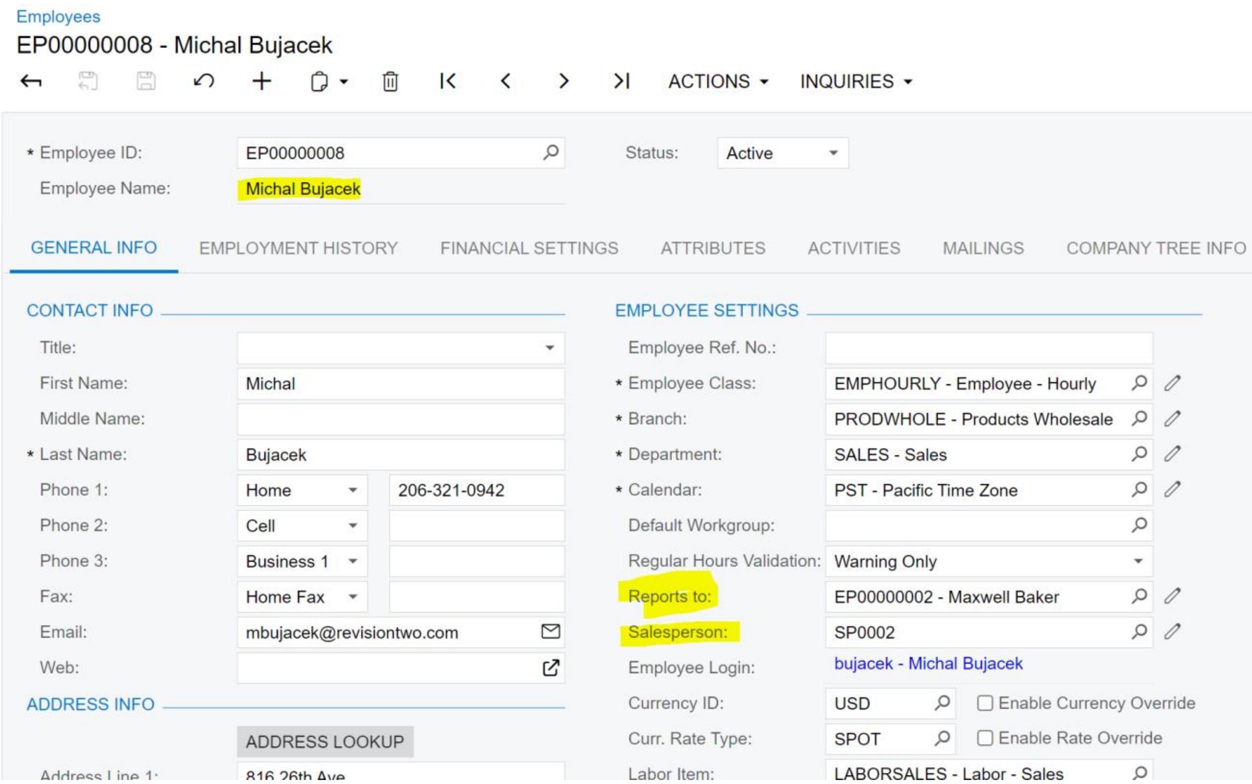
- Three employees have been set up in the system
    - Maxwell Baker is the Supervisor
    - Michael Andrews is Salesperson 1
    - Michal Bujacek is Salesperson 2
- On the **Employee Master** screen, the **Reports To** and **Salesperson** fields need to be filled in, with the **Reports To** field being for the salesperson's sales manager to be selected and the **Salesperson** field being for the individual commissioned salesperson.
    - Maxwell Baker is the Supervisor so his **Reports To** and **Salesperson** fields are blank since he doesn't receive any commissions (in this example). If he did receive commissions, his Salesperson ID would be selected in the **Salesperson** field.



- Michael Andrews as Salesperson 1 has been set up with Maxwell Baker as his Supervisor in the **Reports To** field and his Salesperson ID has been selected in the **Salesperson** field.



- Michal Bujacek as Salesperson 2 has been set up with Maxwell Baker as his Supervisor in the **Reports To** field and his Salesperson ID has been selected in the **Salesperson** field.



- When the salespersons (Michael Andrews and Michal Bujacek) open their dashboards, they will see only their commission data. If the supervisor (Maxwell Baker) opens the dashboard he will see data from both salespersons he is supervising (Michael Andrews and Michal Bujacek).

Flat Rate, Quota and Roll Up Commission Plans

Three types of Commission Plans are used in Advanced Commissions to manage multiple types of commission calculations.

Flat Rate Plan

The commission for the Flat Rate Plan is applied once and is based on a flat commission percent of revenue or a gross margin defined in the plan. The percentage can also be based on the year the transaction occurred.

Let's take a closer look at a common use case.

Suppose that Your Company is selling computer equipment and has one regular customer and three salespersons. Your Company decided to pay commissions to all salespersons according to their contribution and chose invoices with laptops as a commission calculation criterion.

Your Company wants to split commissions between salespersons as follows:

Salesperson1 = 50%
Salesperson2 = 30%
Salesperson3 = 20%

The total value for all rows must be equal to 100. If there are additional salespeople that will receive some type of commission on this line, enter that salesperson with a 0% split. This will allow that salesperson to be tagged to the line and used in the GI Commission Calculations.

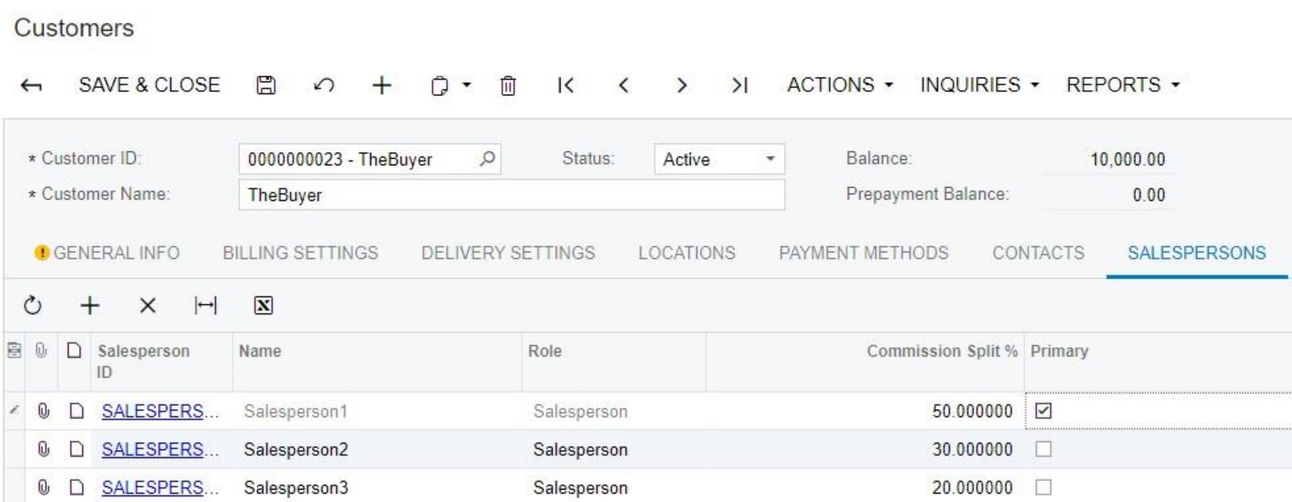
The best way to achieve the goal is to Rate Commission Plan. Let's dive into configuration details.

Set up Salespersons

In the Salesperson (AR205000) form create the necessary Salespersons.

Set up a Customer

In the Customers (AR303000) form, create the default commission splits for that particular customer. In our example, we need to define three Salespersons and fill in the respective commission splits 50%, 30%, and 20%.



We also need to define the Primary Salesperson for quota and reporting purposes. If a Manager or another type of salesperson can receive an override commission for this customer as well, you would add the Salespersons with a 0% Commission Split Percentage.

In general, for commission calculations, you need to bind the Salespersons to entities that have been chosen in the rules or target in a Commission Plan. These entities are located on the following levels: Customers, Invoices and memos, Sales Orders, Project Tasks, and Contract Items.

Defining the Salespersons and Salesperson Splits on the Customer Level is the default for that customer and will automatically populate other entities associated with that Customer. For example, the Customer commission splits for Customer "The Buyer" will default on a sales order line, invoice line, project task, or contract inventory item and will default based on the customer defaults; however, you can modify each of them specifically, and Advanced Commissions will ultimately use the Salespersons and Salesperson splits that make it to the Invoice Line.

Note: If you would like to calculate and pay commissions on documents created before creating an AR Document, such as a Sales Order, this can also be accomplished by setting up the Generic Inquiries to point to the Sales Order Tables.

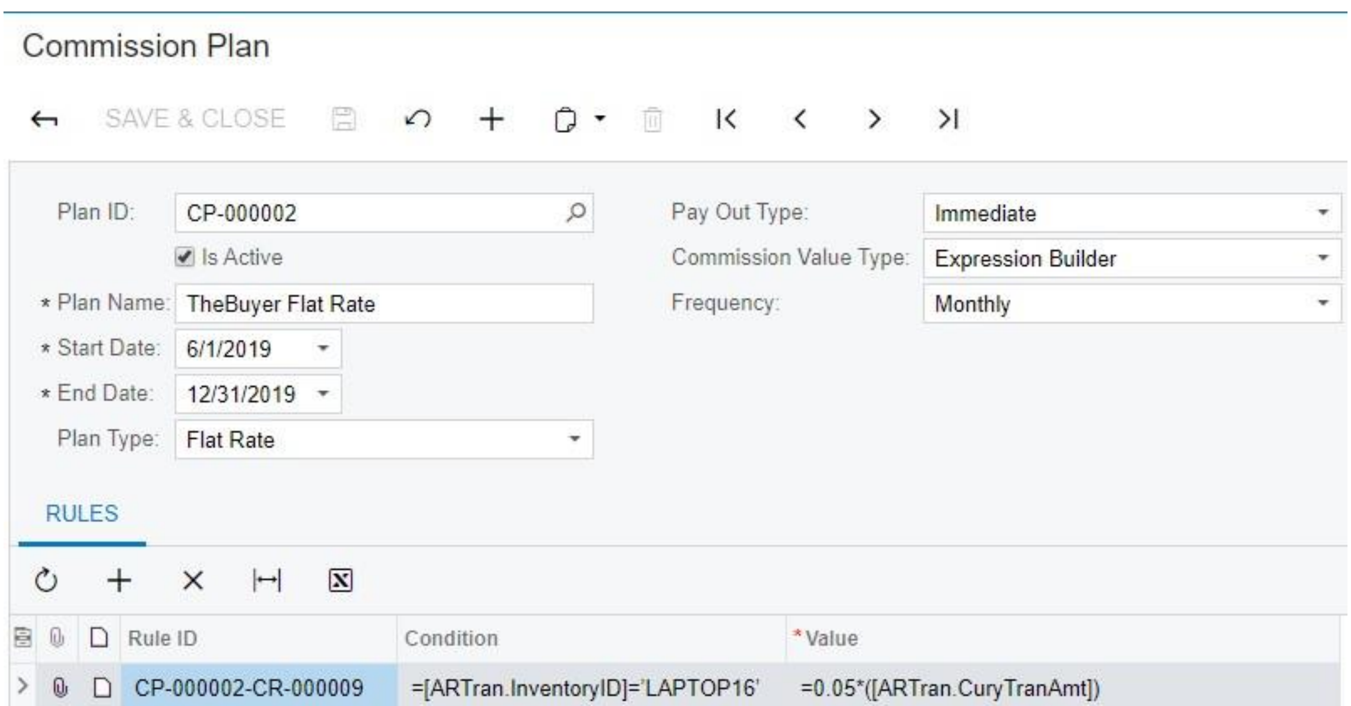
Inventory Items

In our case, there is one type of laptop: laptop16 (Unit price = 15000, Cost = 10000).

Set up a Flat Rate Commission Plan

Name: The Buyer Flat Rate
Start Date: 06/01/2019
End Date: 09/30/2019
Plan Type: Flat Rate
Payout Type: Immediate
Commission Value Type: Expression Builder
Frequency: Monthly
Rules:

Condition =ARTran='LAPTOP16'
Value =0.05*([ARTran.CuryTranAmt])



Assign Salesperson to the plan

Choose the necessary Salesperson from the list (AR2050PL) and on the Commission plan «The Buyer Flat Rate».

Create invoice

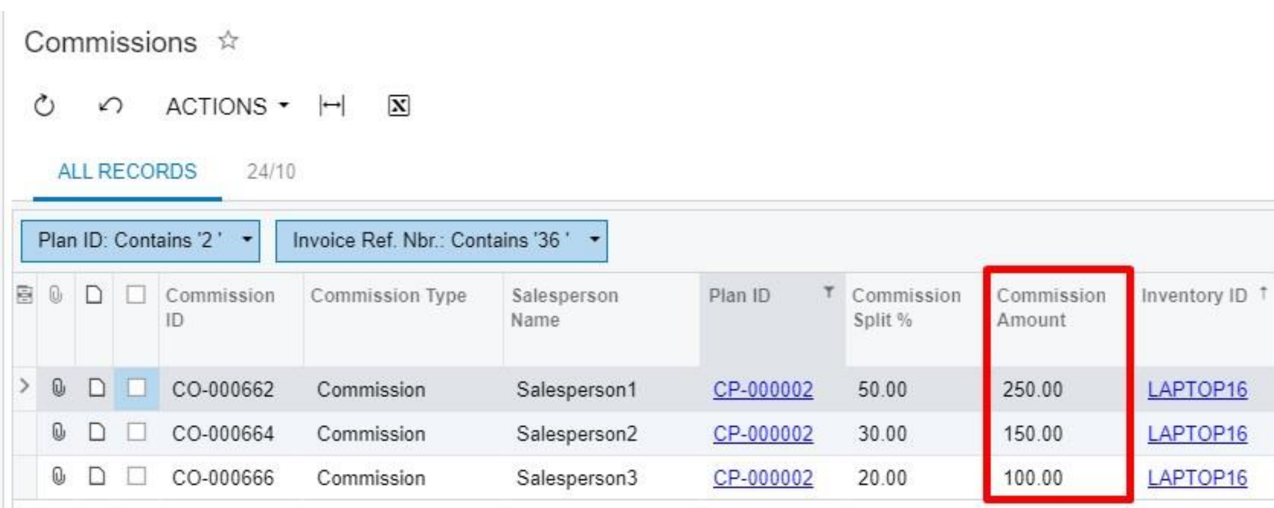
Create an invoice with one line for Item: LAPTOP16.

Calculate commission

In the Calculate Commission (CWAC5010) form, check the «The Buyer Flat Rate» plan and process it.

Result

The commission is created for SALESPERSON1 $250
The commission is created for SALESPERSON2 $150
The commission is created for SALESPERSON3 $100



Commission ID	Commission Type	Salesperson Name	Plan ID	Commission Split %	Commission Amount	Inventory ID
CO-000662	Commission	Salesperson1	CP-000002	50.00	250.00	LAPTOP16
CO-000664	Commission	Salesperson2	CP-000002	30.00	150.00	LAPTOP16
CO-000666	Commission	Salesperson3	CP-000002	20.00	100.00	LAPTOP16

Quota Plan

The second commission plan type is the quota plan, which is based on meeting a particular sales revenue level or target and accumulates for each sale until the predefined revenue target or quota goal is reached. The quota plan can also be the number of items sold, such as the number of licenses that need to be sold before paying a commission.

Once the revenue target is met, a bonus payout is created based on the revenue target or goal achieved. The quota plan accumulates over time. With the per-sale plan, the payout occurs for each transaction compared to the quota plan, which needs to reach a revenue target or goal before a payout can occur.

Let's take a closer look at this case.

Suppose that Your Company decided to pay commissions to a salesperson when a certain number of invoices are processed for that salesperson (regardless of the status) for the period 10.01.2019 - 12.31.2019. If 1 Invoice is processed and has the salesperson tied to the lines as the primary salesperson, they will receive a Flat Commission of $150.00. After the 3rd Invoice is processed that meets the same criteria, they will receive a flat $500.00. This plan is now complete for this salesperson since all rules have been met and paid out. This is a very simple example but helps to define how the Quota calculations, accumulations, and payouts work.

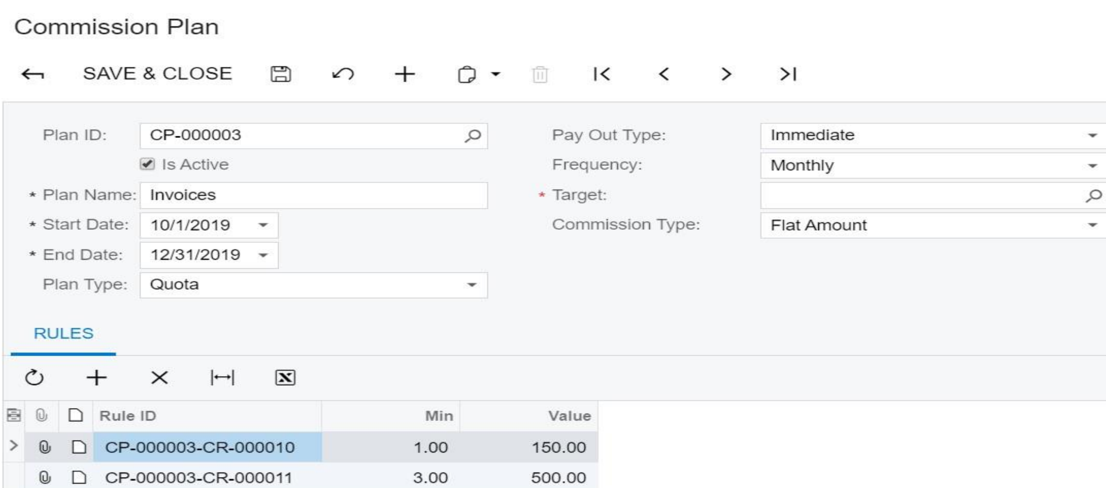
The best way to achieve that is to create a Quota Commission Plan: let's dive into the configuration details.

Set up Salespersons

In the Salesperson (AR205000) form, create the necessary Salespersons.

Set up a Quota Commission Plan

Name: Invoices
Start Date: 10/01/2019
End Date: 12/31/2019
Plan Type: Quota
Payout Type: Immediate Frequency: Monthly *Target:
Commission Type: Flat Amount On the Rules 2 lines:
= 1, Value = 150 = 3, Value =500



As you can see the Target field is still empty since we need to define a Generic Inquiry to calculate and accumulate the number of invoices processed for that salesperson. Let's have a closer look.

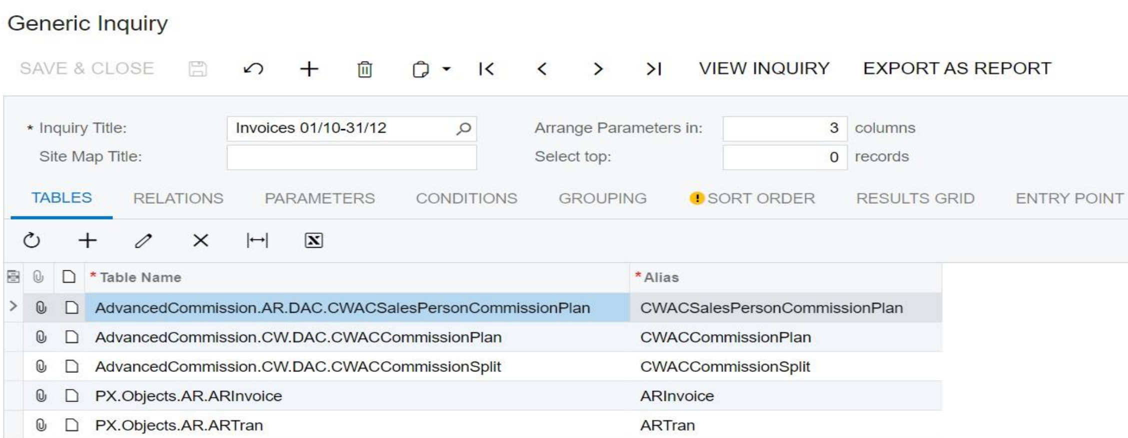
The Target field is a result of a Generic Inquiry. Generic inquiries provide non-programmers with an easy-to-use web-based interface to create inquiries and add them to the system. A generic inquiry is an Acumatica ERP form based on a query that collects data from the Acumatica ERP database and displays the query results. You should read about all the functionality in the article Generic Inquiry Overview. So, let's look at our case.

Generic inquiries have prepared inquiries, but most of the time, you will need your custom inquiry. So, you need to click the pencil icon near the Target field to create a new inquiry.

Tables tab

Here you need to select the DACs (data access classes) to be used in your generic inquiry. In other words, you need to bind all the data.

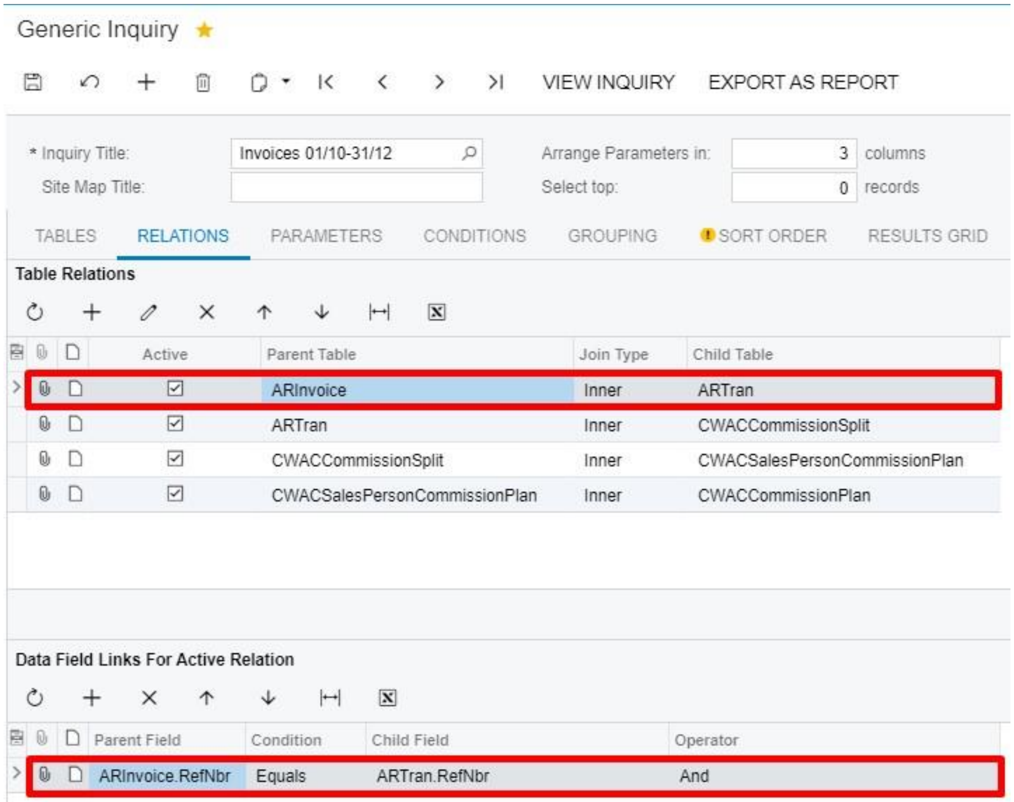
In our case, we need to select five tables. See the screenshot below. The Alias fills automatically.



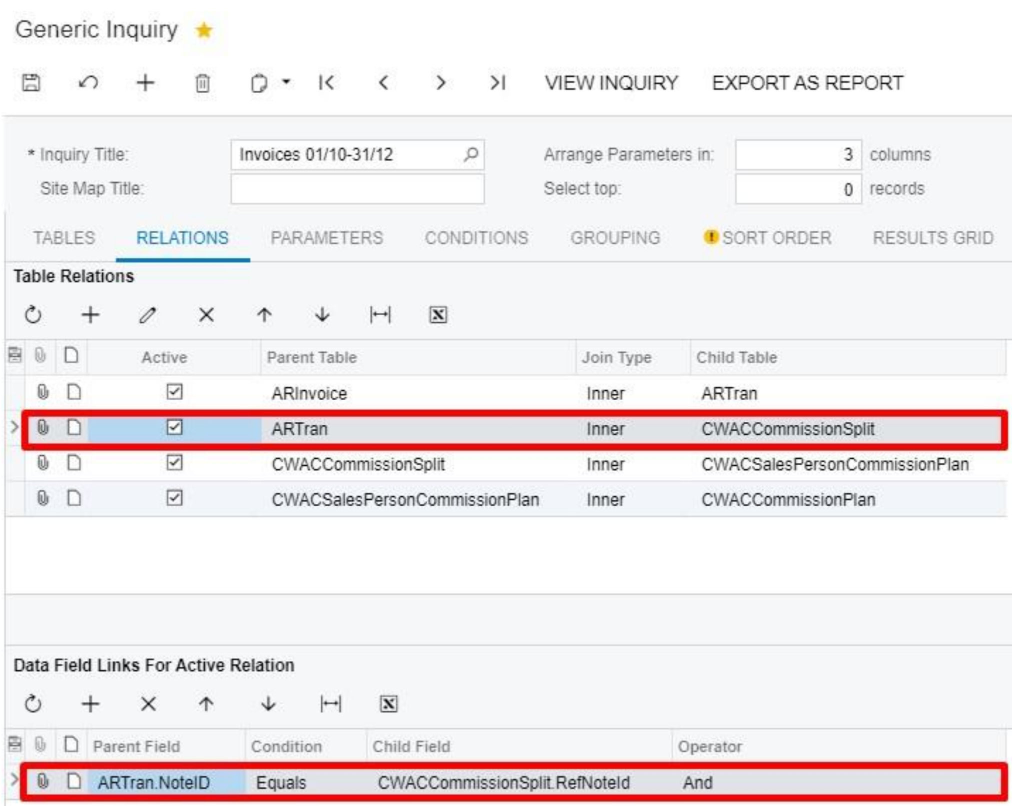
Relations tab

In the Table Relations area of this tab, you can specify the relations between Parent and Child tables by selecting a Joint Type and choosing data for relations to each relationship between Parent and Child tables. See the screenshots below.

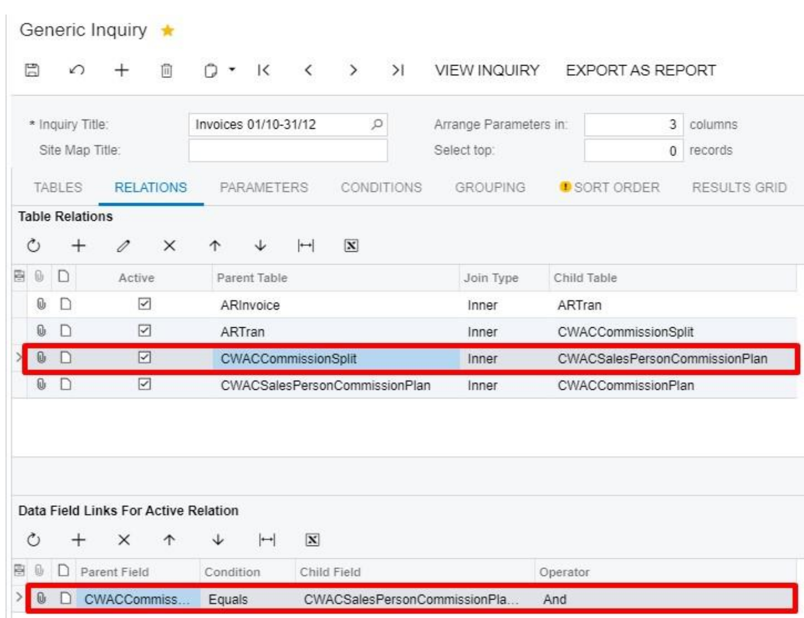
For the first relations:


Generic Inquiry
VIEW INQUIRY
EXPORT AS REPORT
* Inquiry Title:
Invoices 01/10-31/12
Site Map Title:
Arrange Parameters in:
3
columns
Select top:
0
records
TABLES
RELATIONS
PARAMETERS
CONDITIONS
GROUPING
SORT ORDER
RESULTS GRID
Table Relations
Active
Parent Table
Join Type
Child Table
ARInvoice
Inner
ARTran
ARTran
Inner
CWACCommissionSplit
CWACCommissionSplit
Inner
CWACSalesPersonCommissionPlan
CWACSalesPersonCommissionPlan
Inner
CWACCommissionPlan
Data Field Links For Active Relation
Parent Field
Condition
Child Field
Operator
ARInvoice.RefNbr
Equals
ARTran.RefNbr
And

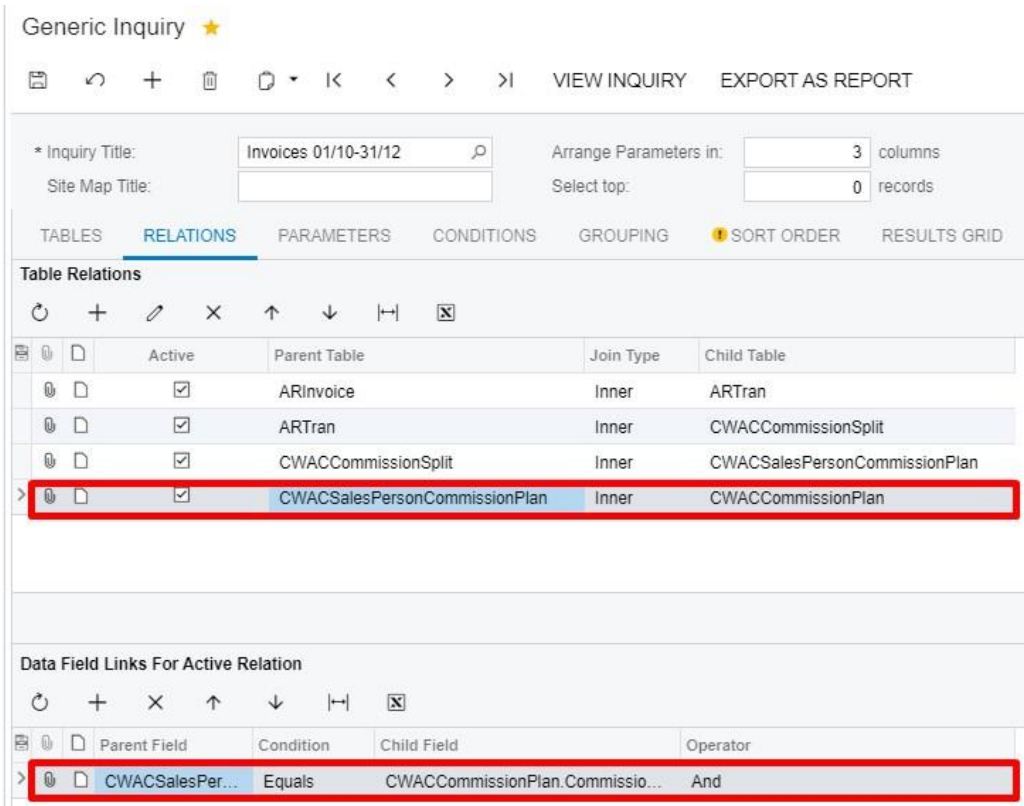
For the second relations:



For the third relation:



For the fourth relation:

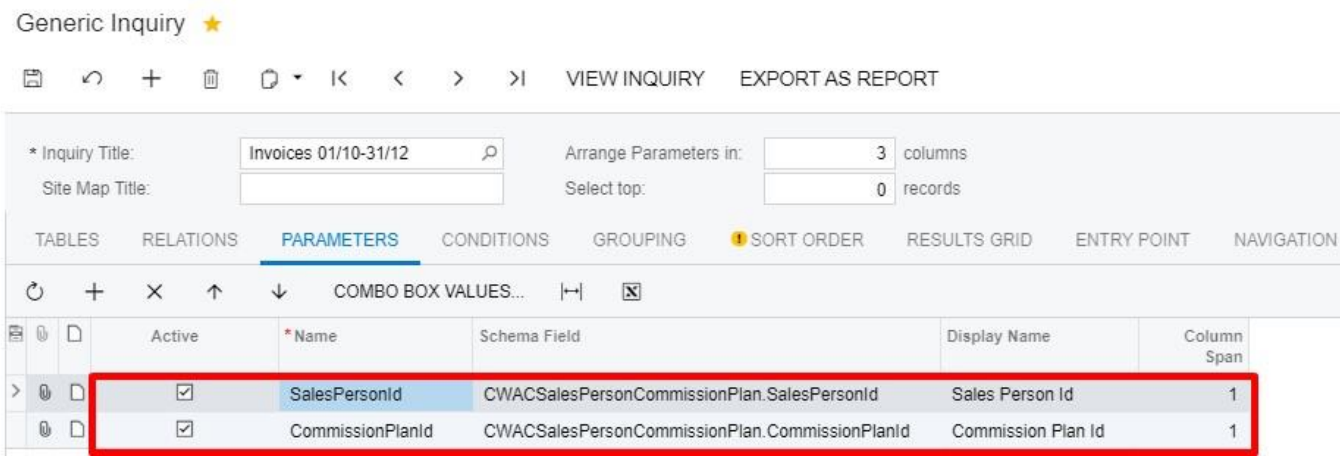


Parameters tab

Here you select and configure the parameters that are required for the Advanced Commission and other parameters you wish to create. Advanced Commissions has 2 required parameters: CommissionPlanId and SalesPersonId.

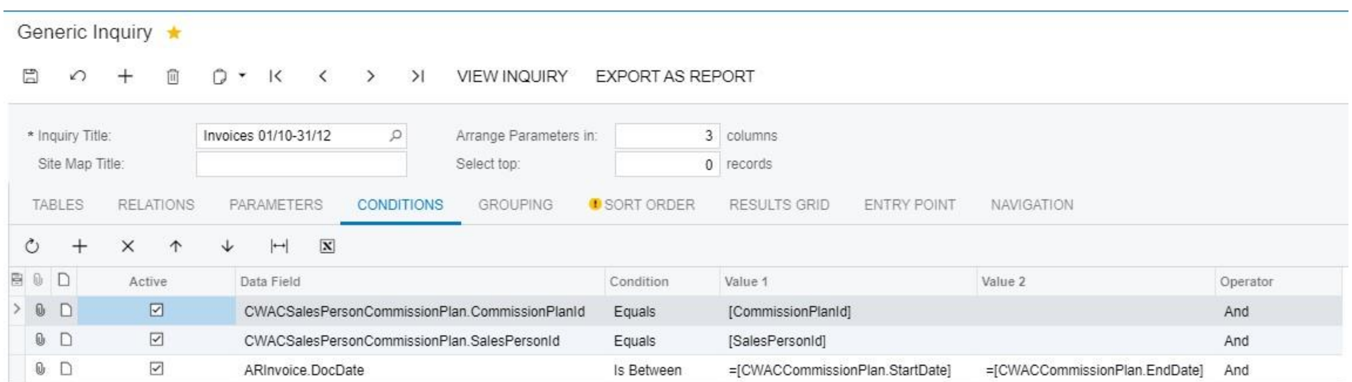
- CommissionPlanId is used within the GI to only take into account the records between the Start Date and End Date of the plan. It's the responsibility of the GI author to use the dates correctly to filter the results.
- SalesPersonId is used within the GI to only take into account the records related to a certain Salesperson. It's the responsibility of the GI author to use the field correctly to filter the results.

Therefore, you need to specify these parameters. See the screenshot below.



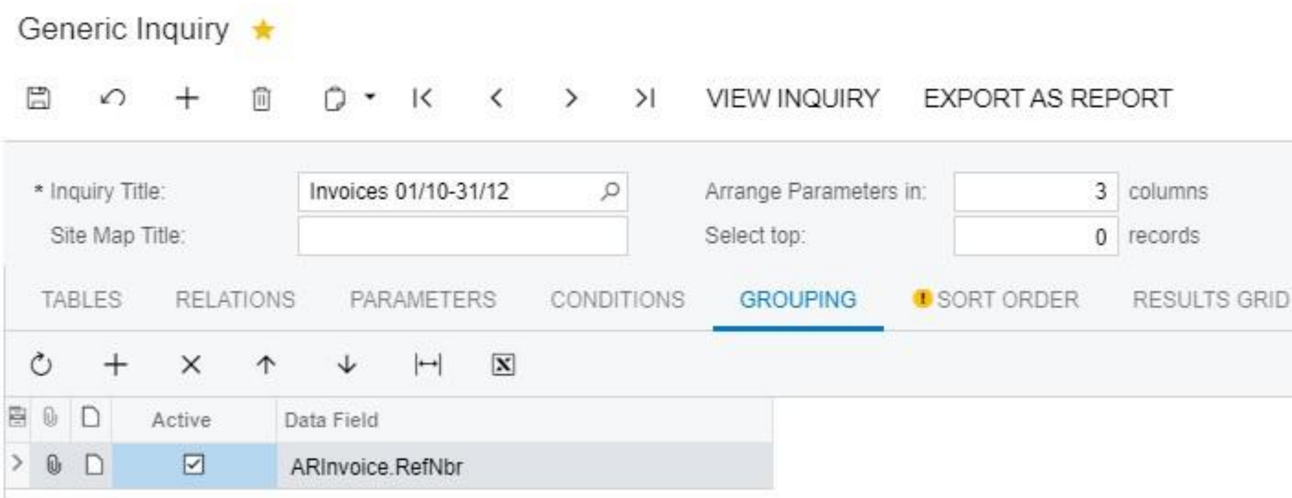
Condition tab

The conditions tab is used to filter the data (records) to be retrieved. For example, an inquiry displaying a customer's balance, based on the specified conditions, can hide invoices with a balance of zero. See the screenshot below.



Grouping tab

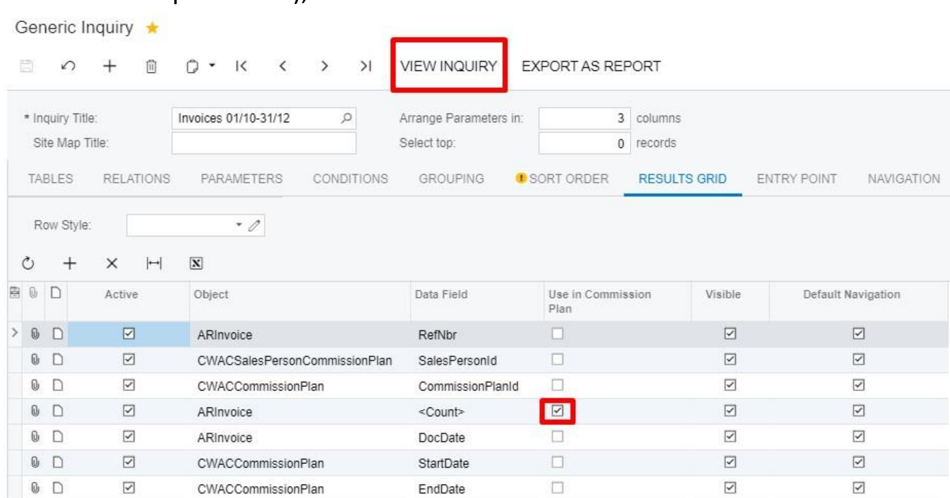
You can group inquiry data by specifying grouping conditions on the Grouping tab. In our case, we choose the Invoice reference number.



Result grid tab

Here you can specify data fields that will be displayed in the View inquiry mode.

It is also important to select the "Use in Commission Plan" field so the result of that field will be returned to the Commission plan for calculations. In our example, we chose AR Invoice, the Data field <Count> (since we want to add up the number of invoices processed), and enable Use in Commission Plan checkbox.



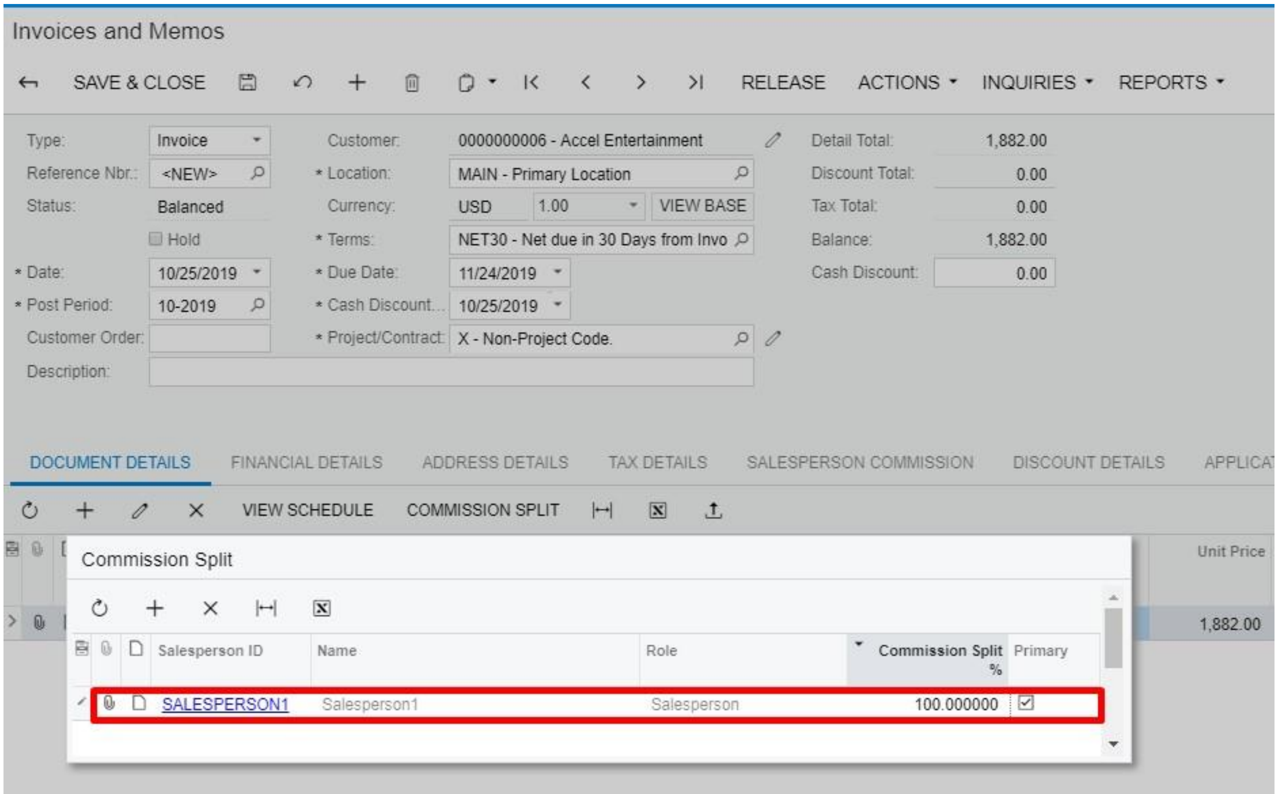
In our example, we called this GI, "Invoices 01/10-31/12" and then saved and closed the GI screen. Our generic inquiry is now ready, and it appears in the Target field in the Commission Plan form; click Save and Close. Our Commission Plan is ready. If the GI is created outside of the Commission Plan screen, simply look up and select the applicable GI that you will use in the commission plan.

Assign Salespersons to the plan

Choose the necessary Salesperson from the list (AR2050PL) and on the Commission Plan the plan "Invoices".

Create invoice

Create at least three invoices for illustrative purposes and specify Commission Split on each invoice line tab (which will default from the Customer record if already set up for this Customer). Please note, it is also necessary to enable the Primary checkbox.

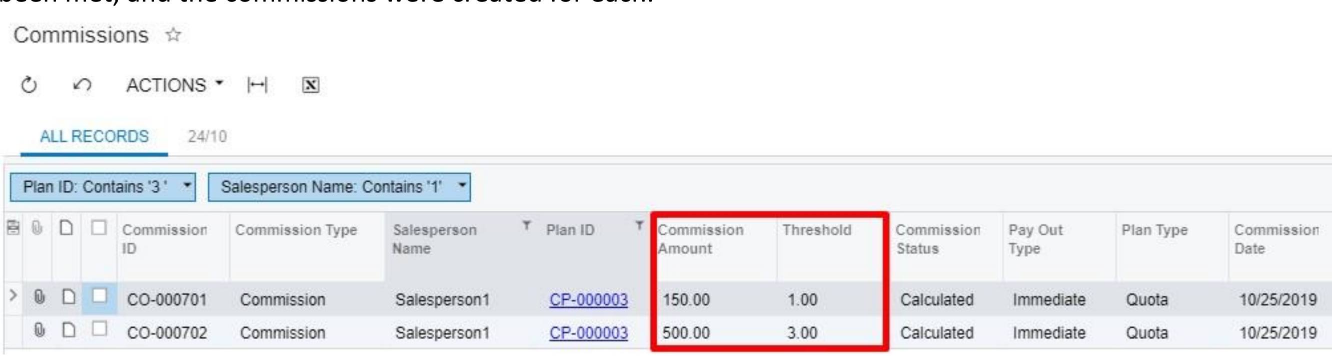


Calculate commission

In the Calculate Commission (CWAC5010) form, check the «Invoices» plan and process it.

Result

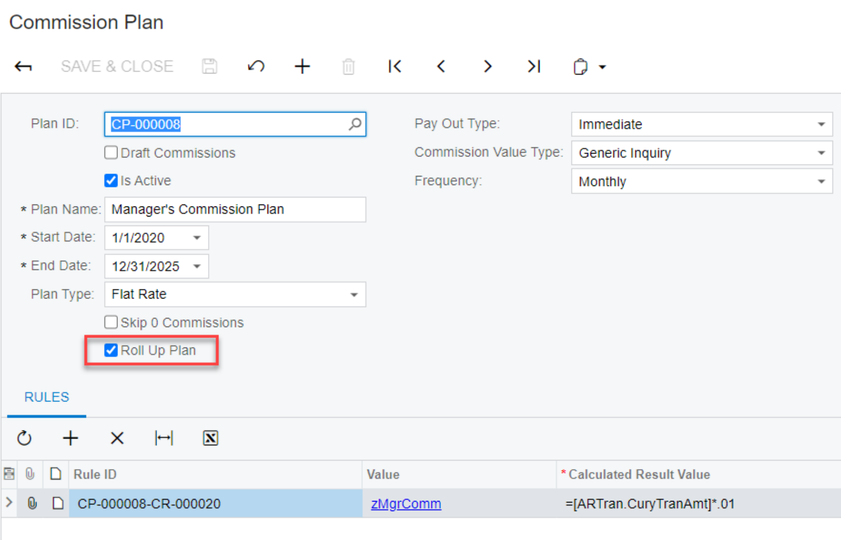
In the Commissions (CWAC4020) form we will now see that both the Thresholds (1 Invoice and 3 Invoices) have been met, and the commissions were created for each.



Roll Up Plan

The third commission plan type is the roll-up plan. All plans we have explored so far allow you to calculate the commission for any Salesperson that is listed on the Commission Split of an AR Invoice. But what if all Managers earn commission from items sold by all salespeople who report to them? Or if all salespeople in a certain branch earn a monthly commission based on the combined sales of all AR Invoices from that branch? Both examples are good cases for a Roll-Up Plan, an option that is only available for commission plans with the Commission Value Type of Generic Inquiry.

A Roll Up plan lifts the condition of specifying a Salesperson in the Generic Inquiry used to calculate commissions. This allows more flexibility in the GI creation for Roll Up Plans.



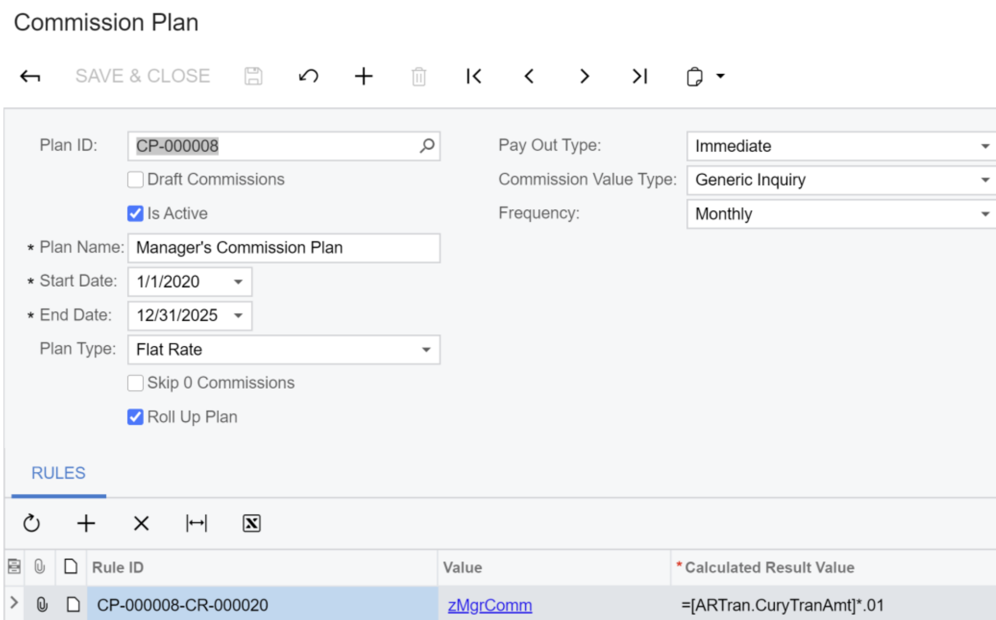
The best way to achieve that is to create a Roll-Up Commission Plan: let's dive into the configuration details.

Set up Salespersons

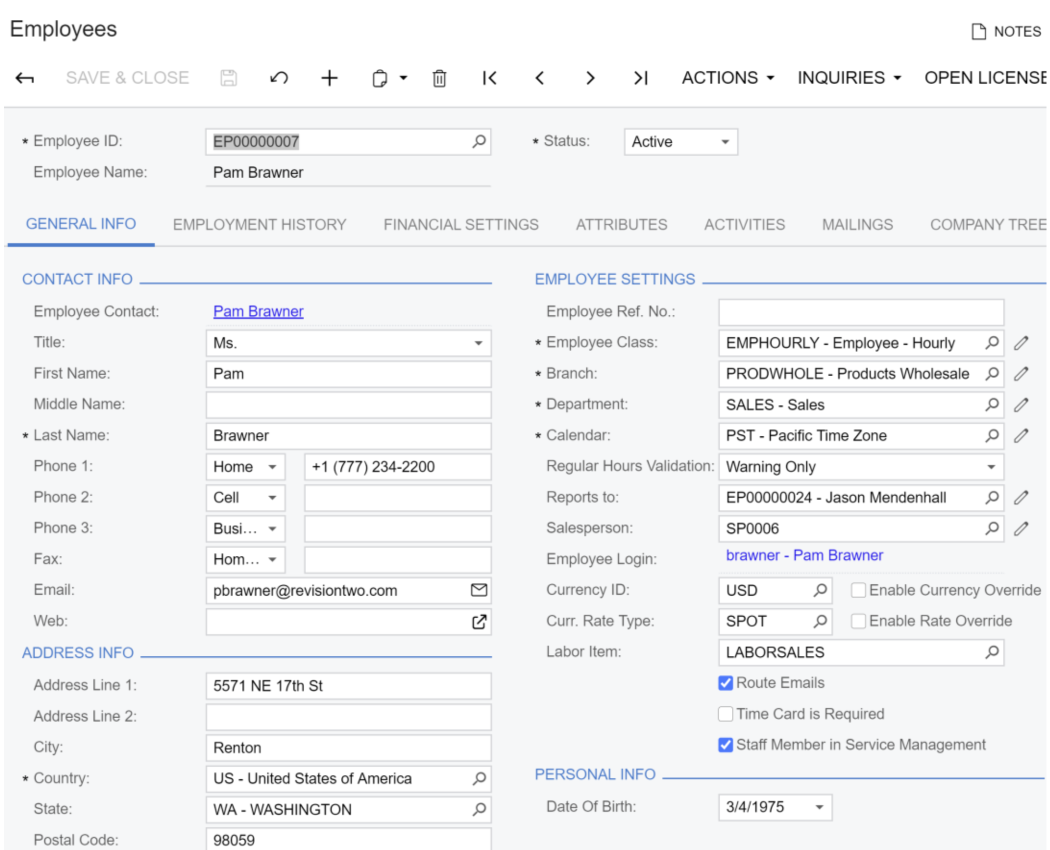
In the Salesperson (AR205000) form, create the necessary Salespersons.

Set up a Roll Up Commission Plan

Name: Manager's Commission Plan
Start Date: 01/01/2020
End Date: 12/31/2025
Plan Type: Flat Rate
Payout Type: Immediate
Frequency: Monthly
Roll-Up Plan: Checked
Commission Value Type: Generic Inquiry
Rules: Generic Inquiry zMgrComm



The CP-000008 Roll-Up commission plan example is based on a Sales Manager earning a 1% commission on all AR invoices tied to the Salespeople that report to them. The Sales Manager for an Employee would be defined on the employee setup window in the 'Reports to' field. In the example below, Pam Brawner reports to Jason Mendenhall in the Wholesale Products branch.



We need to define a Generic Inquiry to calculate and accumulate the number of invoices processed for that salesperson. The Generic Inquiry in this example looks up the Supervisor ID of the Employee listed on the commission split on an AR Invoice and calculates the 1% commission earned by the Supervisor. As a result, the Supervisor is added to the 'Manager's Sales Commission' plan and not the Employee. Let's have a closer look.

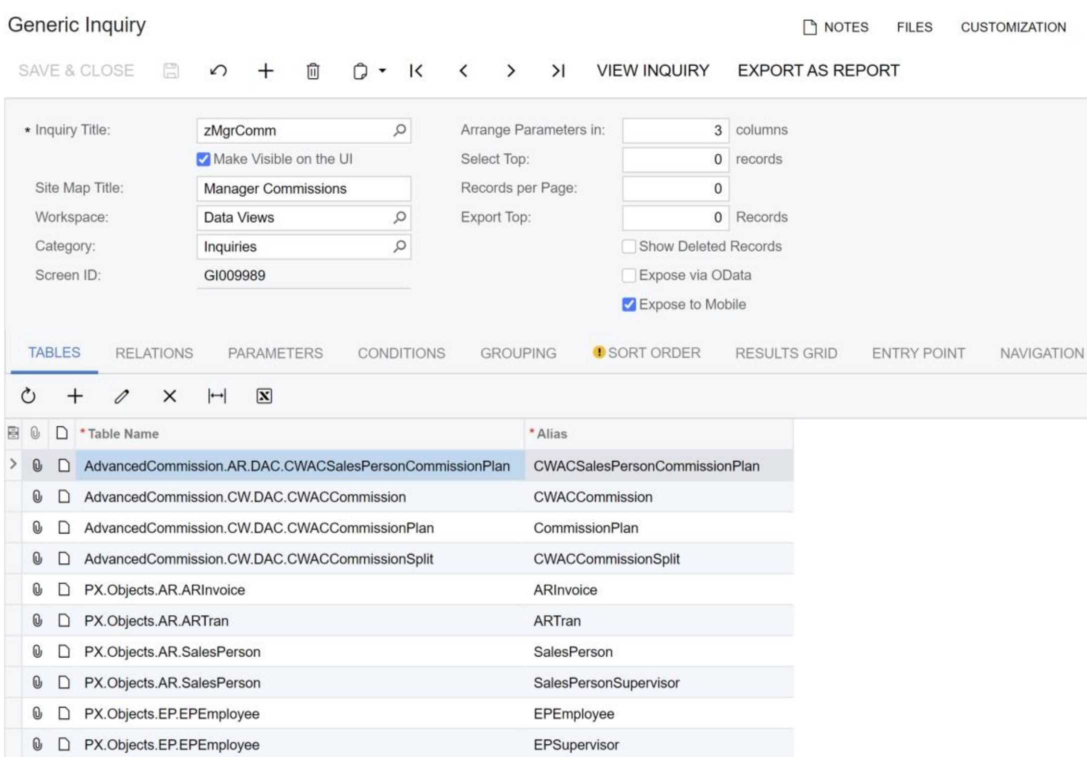
The Rule condition is a result of a Generic Inquiry. Generic inquiries provide non-programmers with an easy-to-use web-based interface to create inquiries and add them to the system. A generic inquiry is an Acumatica ERP form based on a query that collects data from the Acumatica ERP database and displays the query results. You should read about all the functionality in the article Generic Inquiry Overview. So, let's look at our case.

Generic inquiries have prepared inquiries, but most of the time, you will need your custom inquiry. So, you need to click the plus sign icon in the toolbar of the Rules section to create a new generic inquiry.

Tables tab

Here you need to select the DACs (data access classes) to be used in your generic inquiry. In other words, you need to bind all the data.

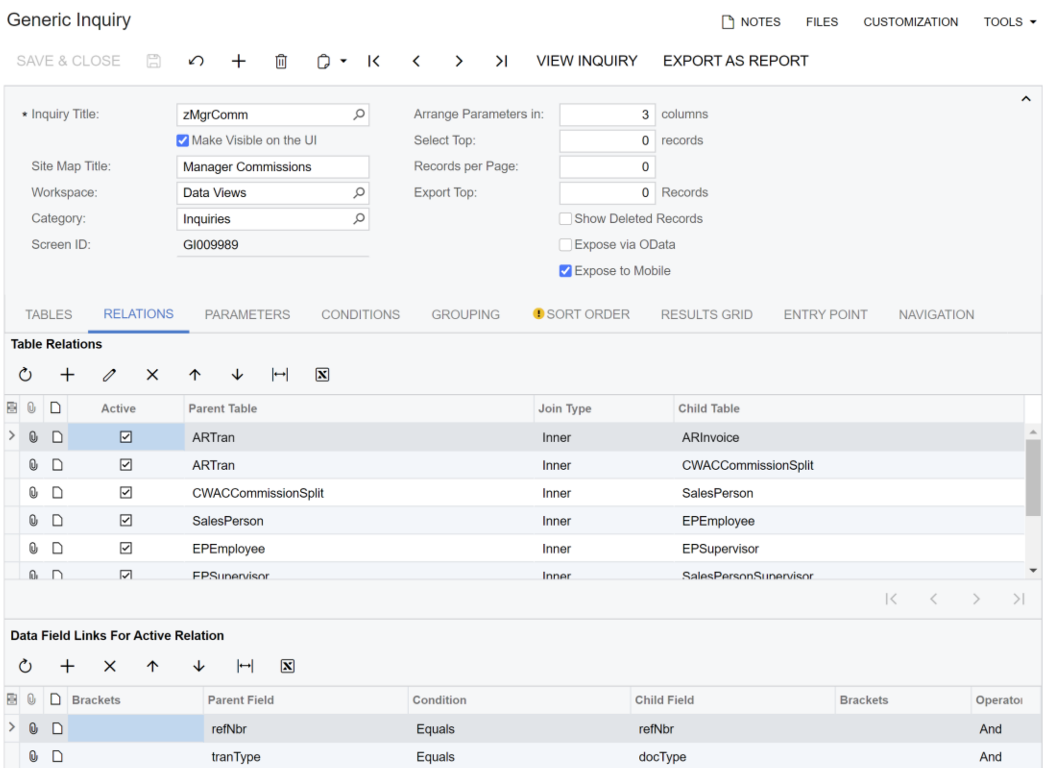
In our case, we need to select ten tables. See the screenshot below. The Alias fills automatically.



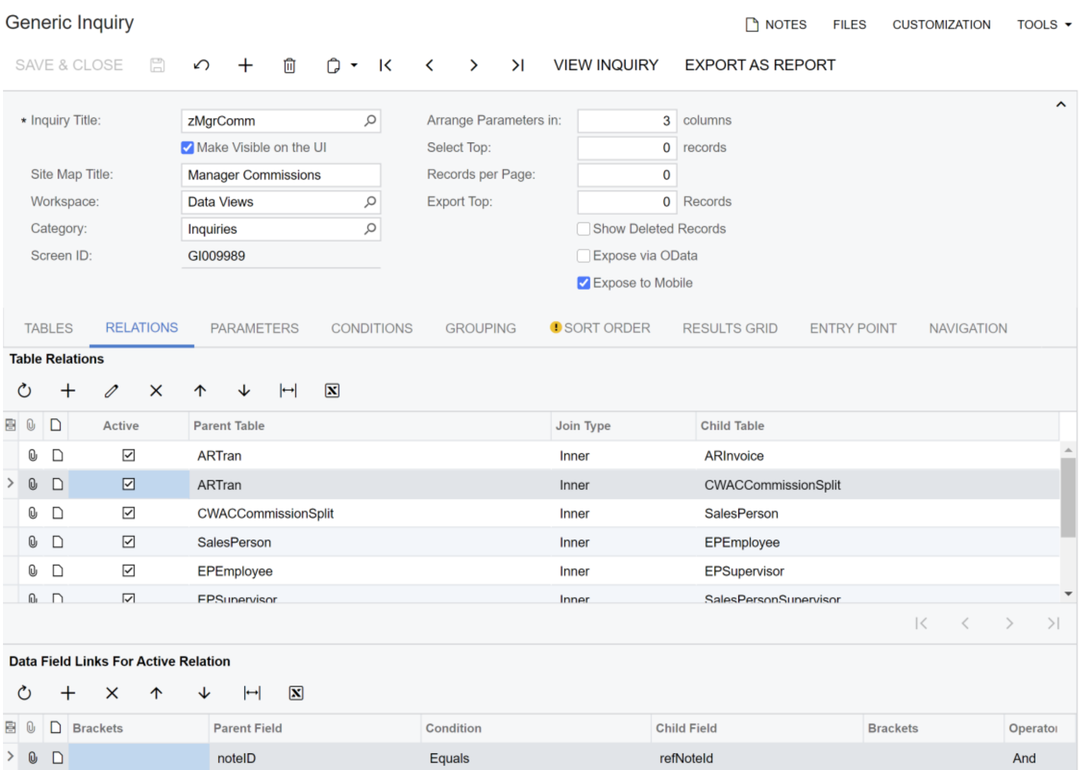
Relations tab

In the Table Relations area of this tab, you can specify the relations between Parent and Child tables by selecting a Joint Type and choosing data for relations to each relationship between Parent and Child tables. See the screenshots below.

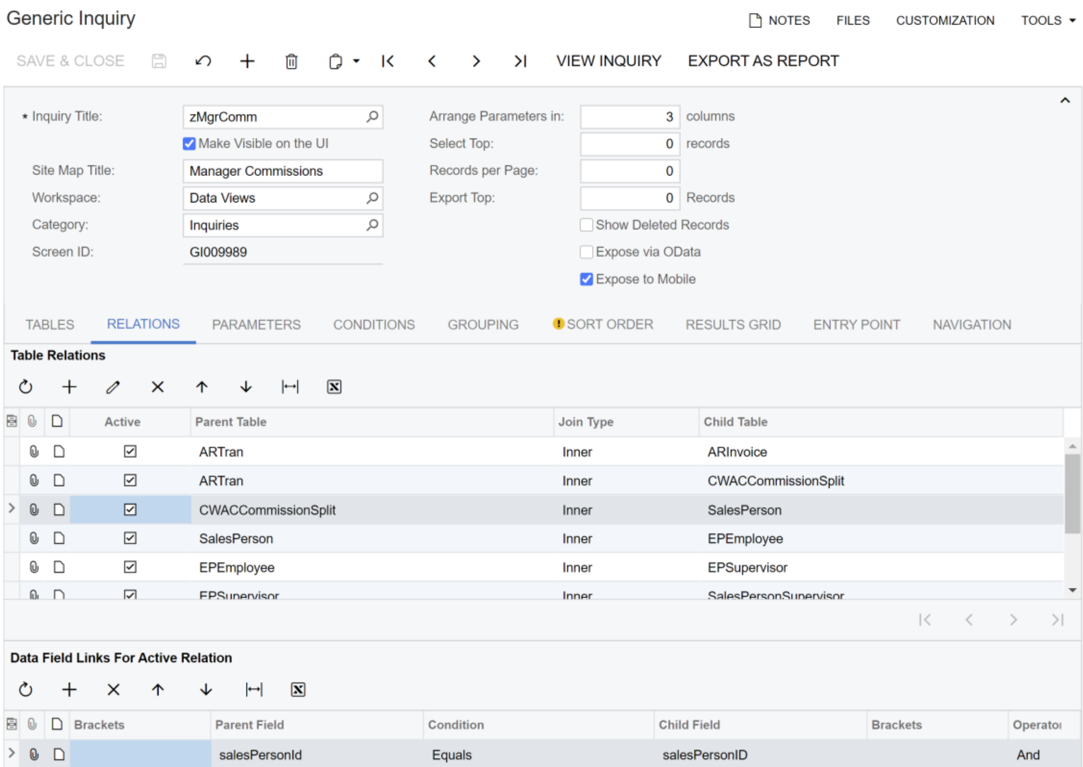
For the first relation:



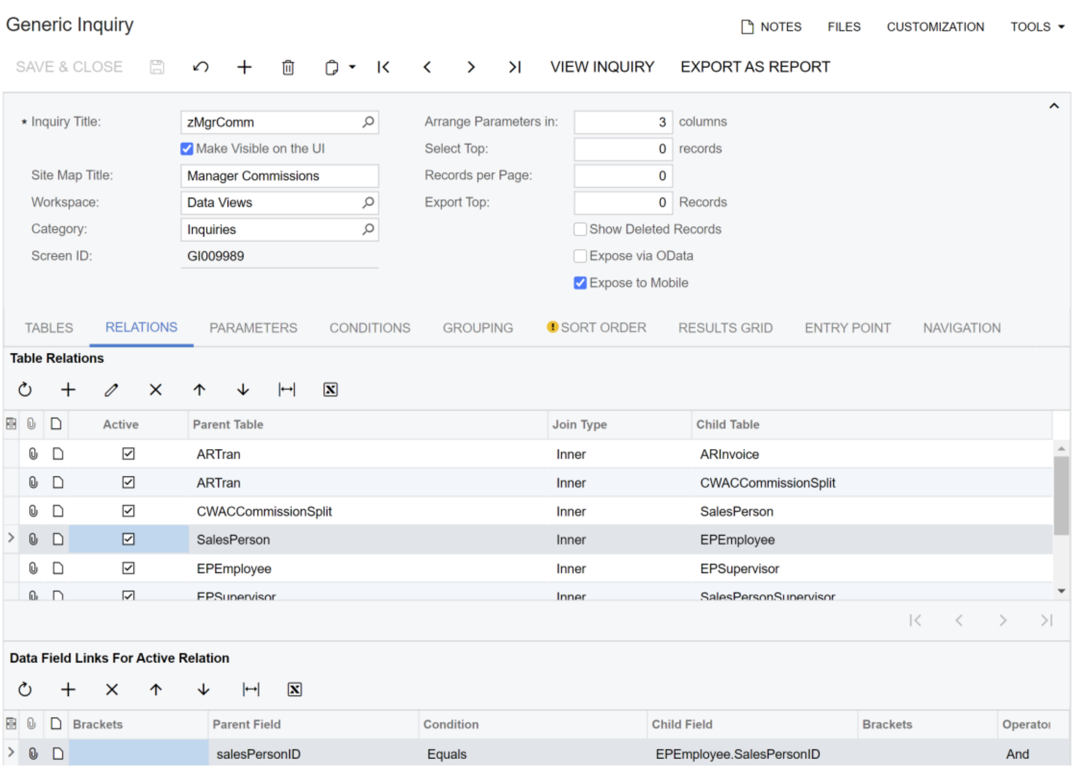
For the second relation:



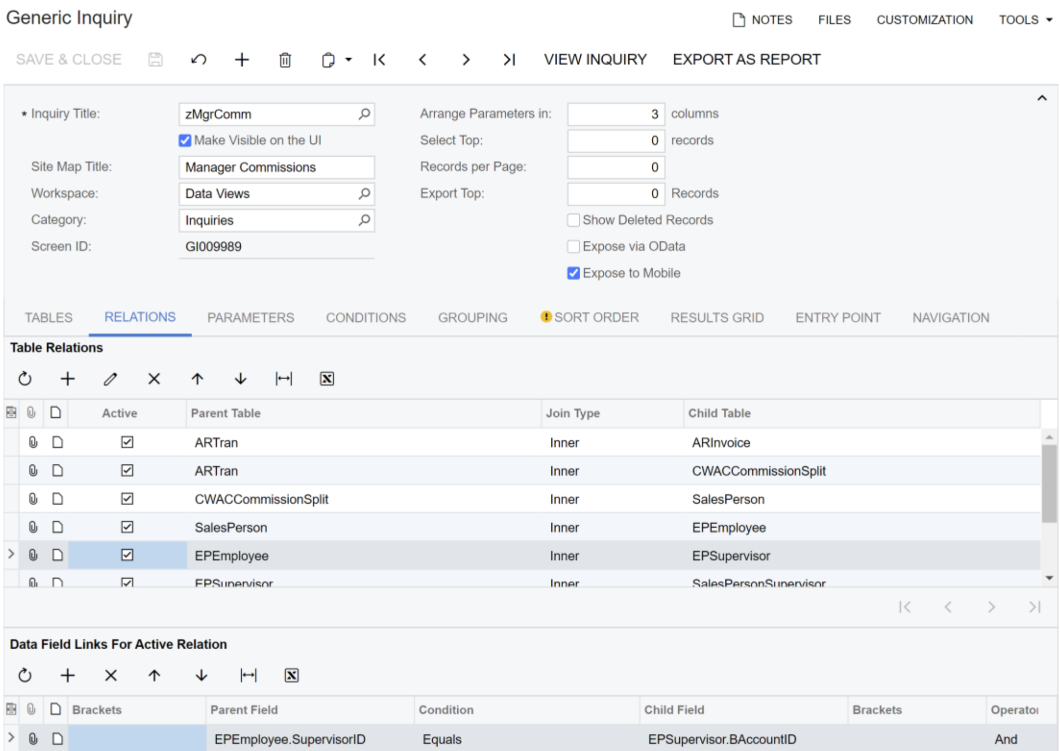
For the third relation:



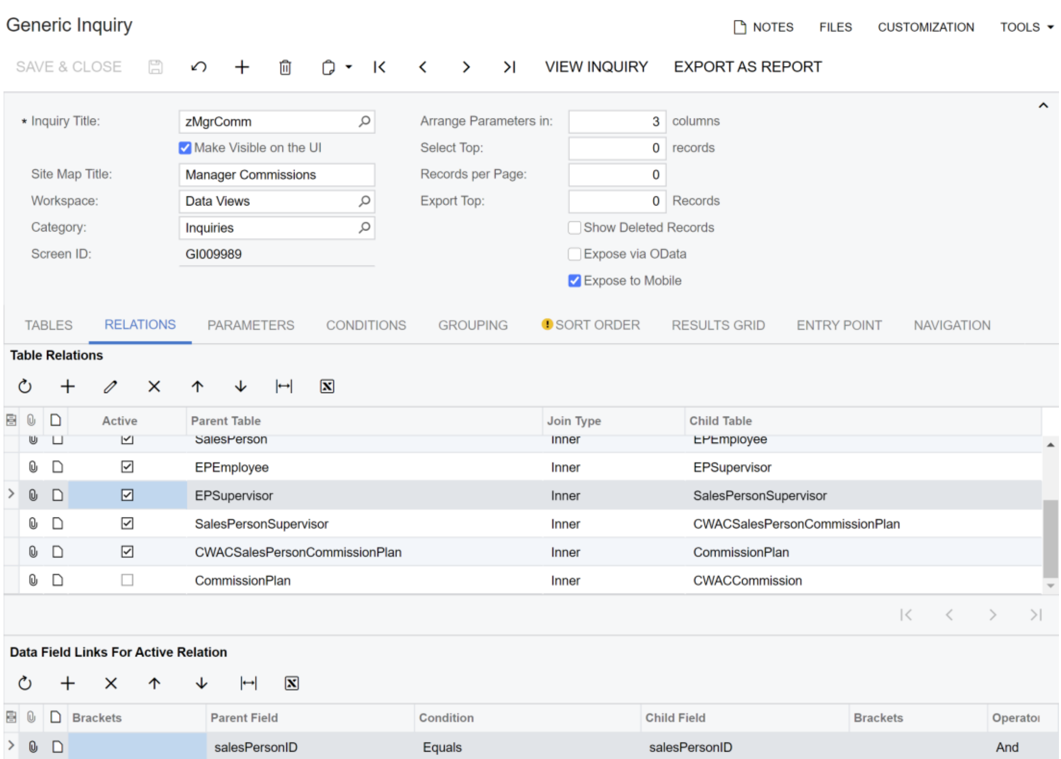
For the fourth relation:



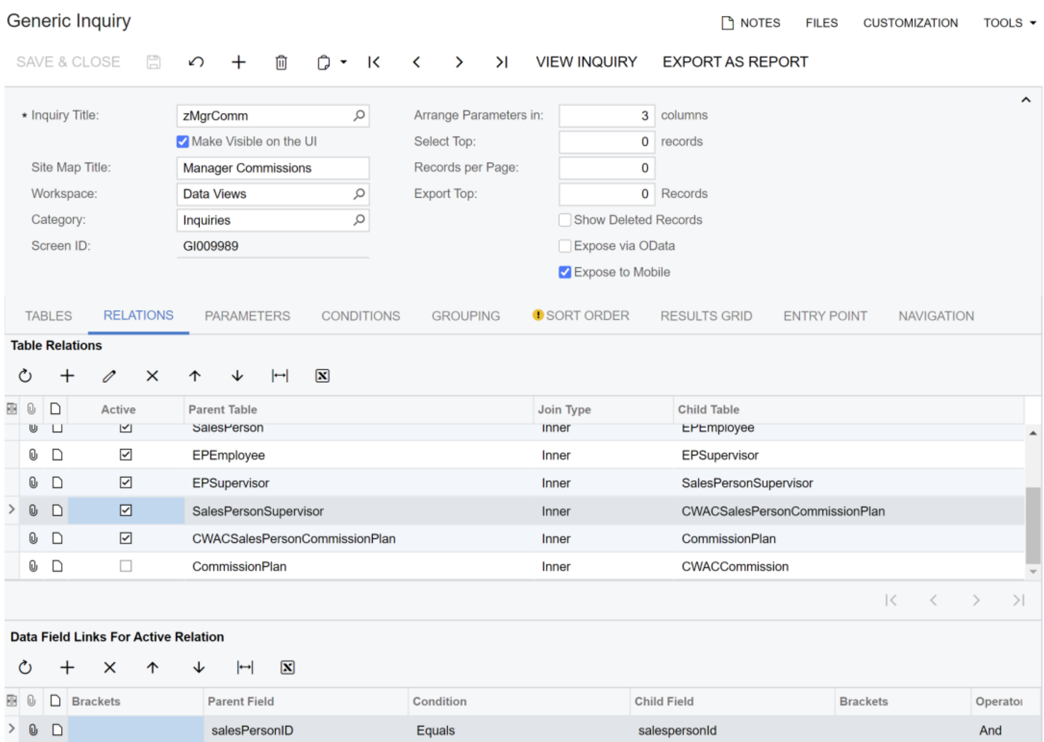
For the fifth relation:



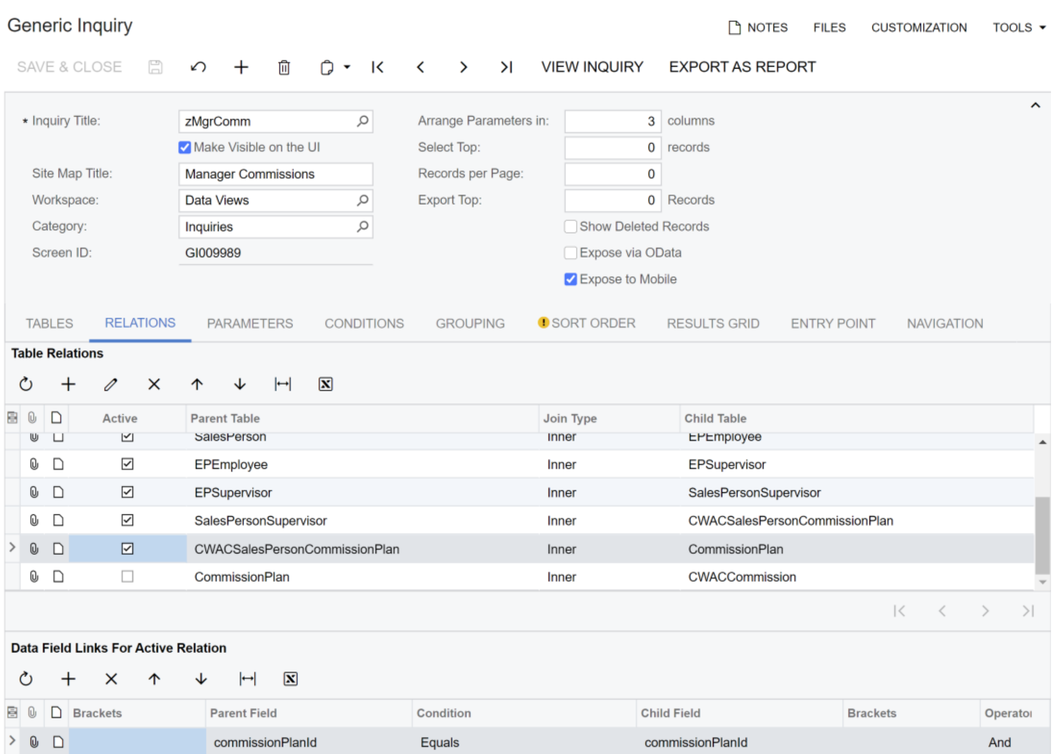
For the sixth relation:



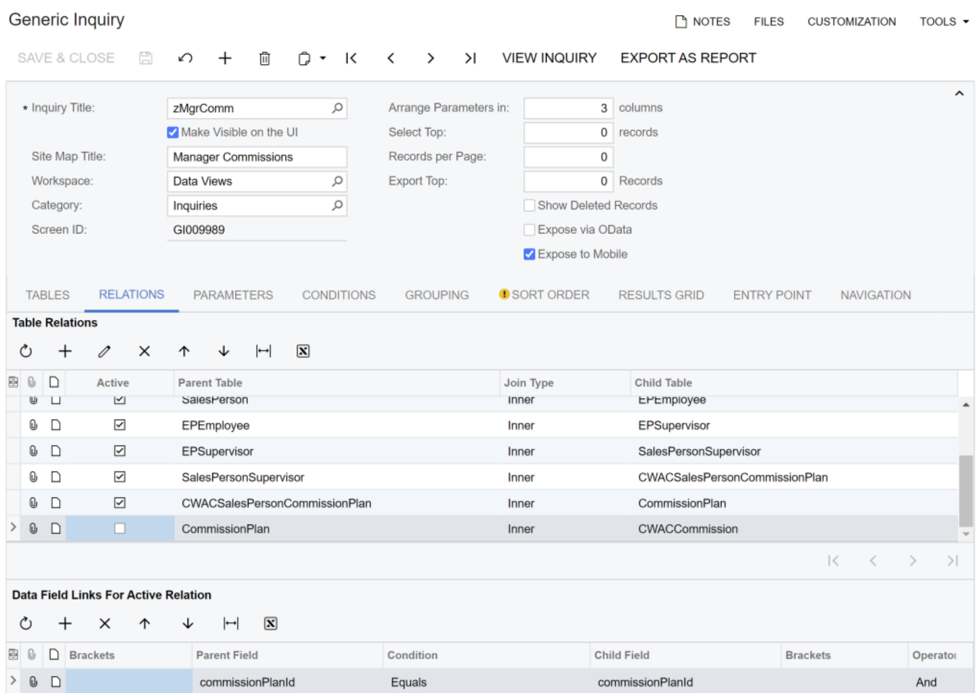
For the seventh relation:



For the eighth relation:



For the ninth relation:

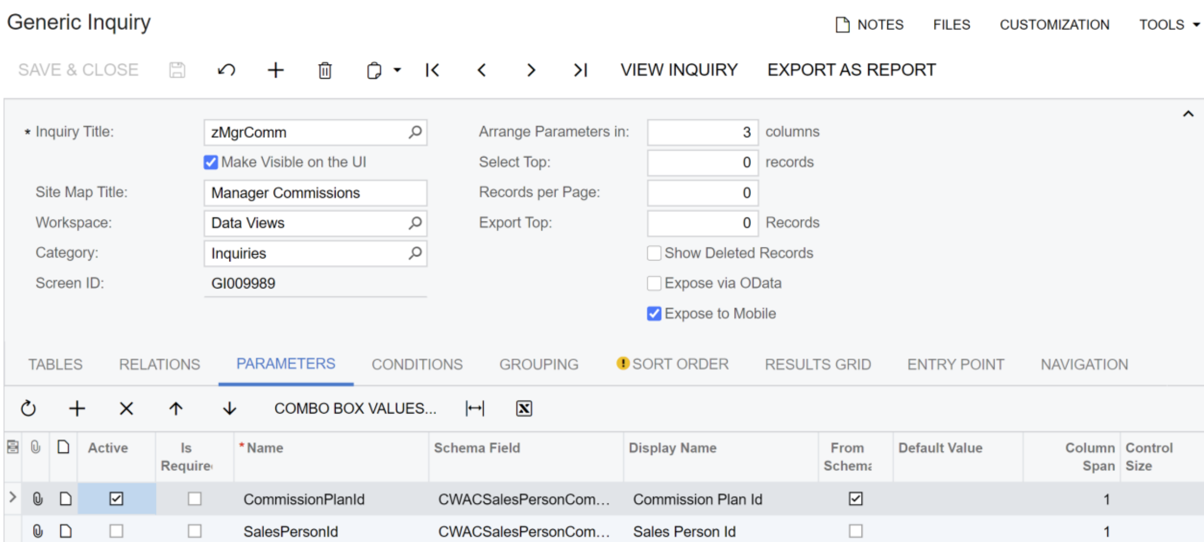


Parameters tab

Here you select and configure the parameters that are required for the Advanced Commission and other parameters you wish to create. Advanced Commissions has 2 required parameters: CommissionPlanId, and SalesPersonId.

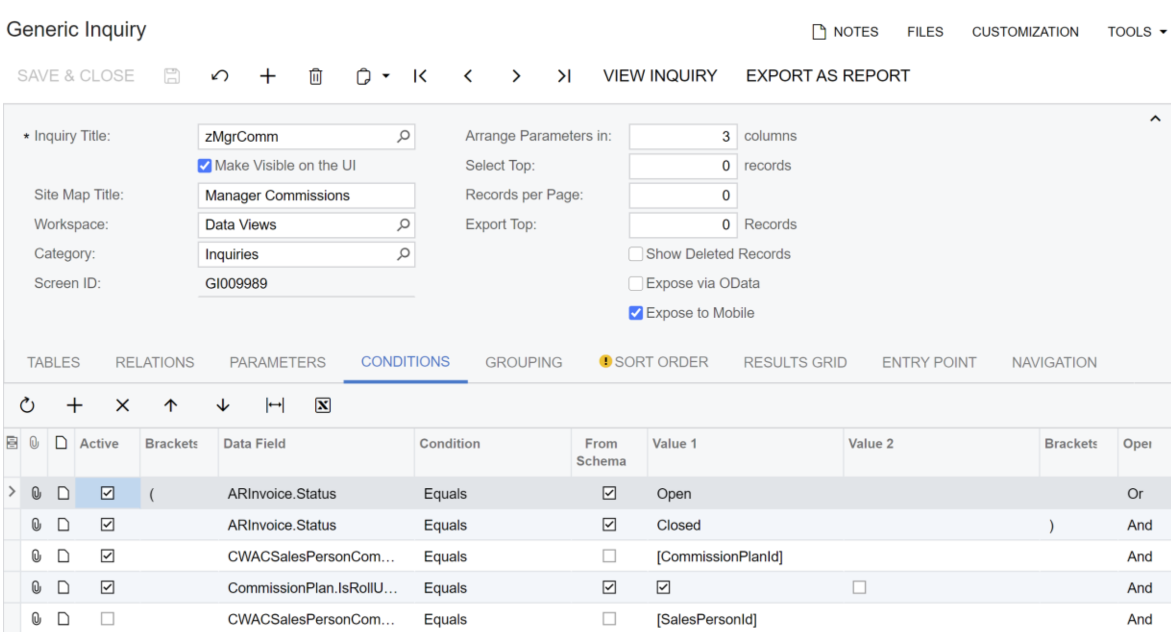
- CommissionPlanId is used within the GI to only take into account the records between the StartDate and End Date of the plan. It's the responsibility of the GI author to use the dates correctly to filter the results.
- SalesPersonId is used within the GI to only take into account the records related to a certain Salesperson. It's the responsibility of the GI author to use the field correctly to filter the results.

Therefore, you need to specify these parameters. See the screenshot below.



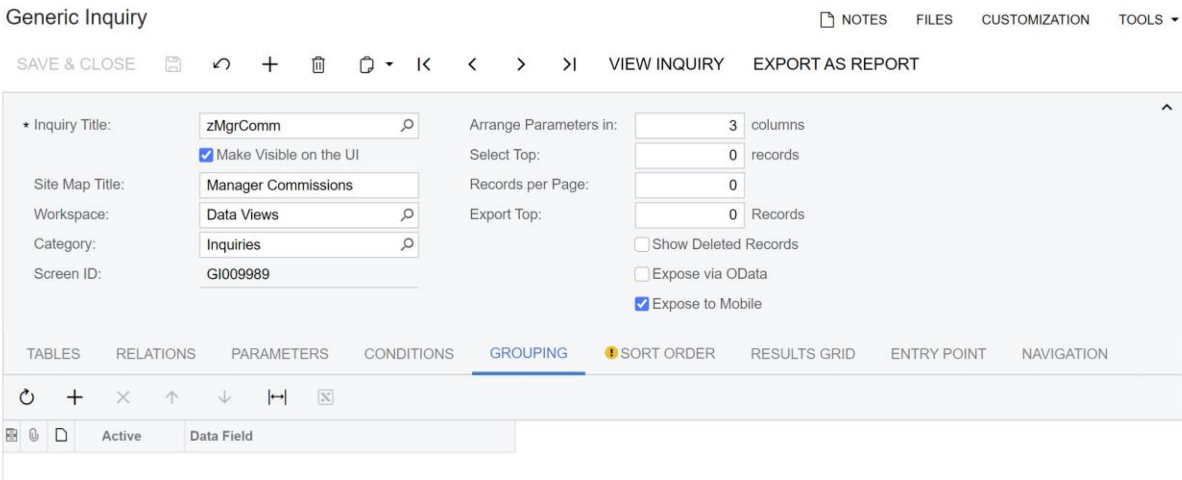
Condition tab

The conditions tab is used to filter the data (records) to be retrieved. For example, an inquiry displaying a customer's balance, based on the specified conditions, can hide invoices with a balance of zero. See the screenshot below.



Grouping tab

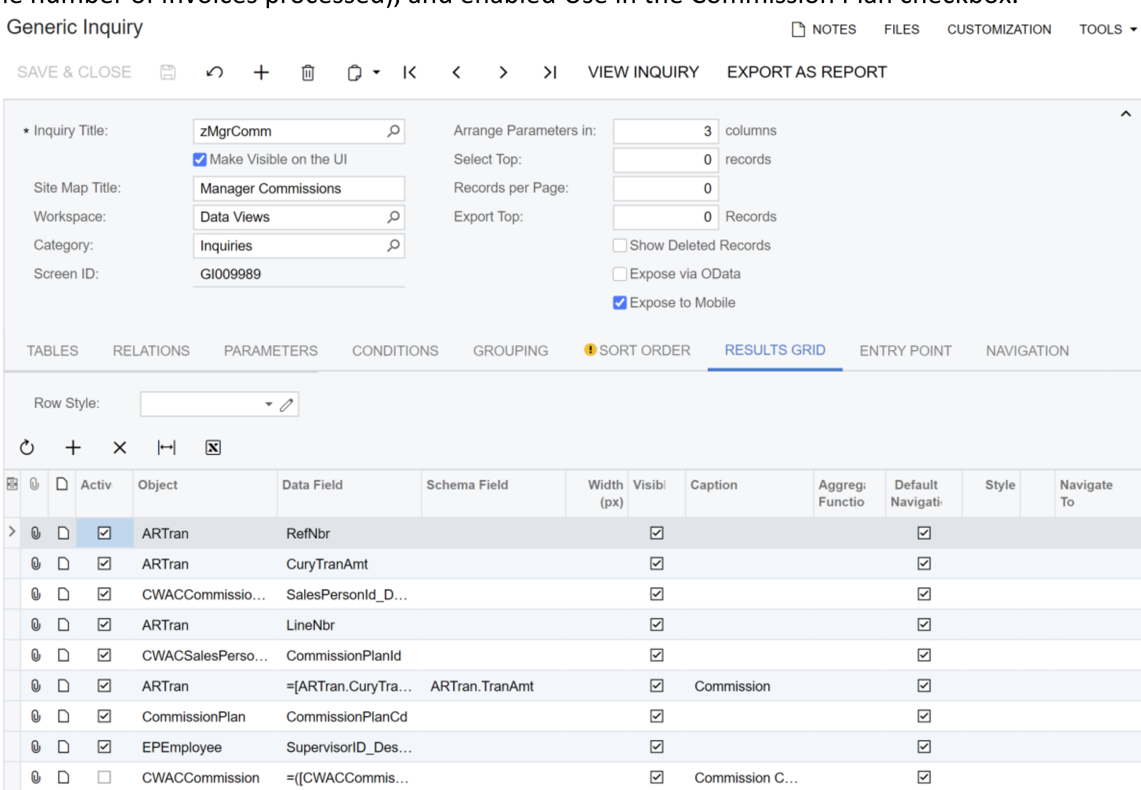
You can group inquiry data by specifying grouping conditions on the Grouping tab. In our case, we do not need a grouping.



Result grid tab

Here you can specify data fields that will be displayed in the View inquiry mode.

It is also important to select the "Use in Commission Plan" field so the result of that field will be returned to the Commission plan for calculations. In our example, we chose AR Invoice, the Data field <Count> (since we want to add up the number of invoices processed), and enabled Use in the Commission Plan checkbox.



In our example, we called this GI, "zMgrComm" and then saved and closed the GI screen. Our generic inquiry is now ready, and it appears in the Target field in the Commission Plan form; click Save and Close. Our Commission

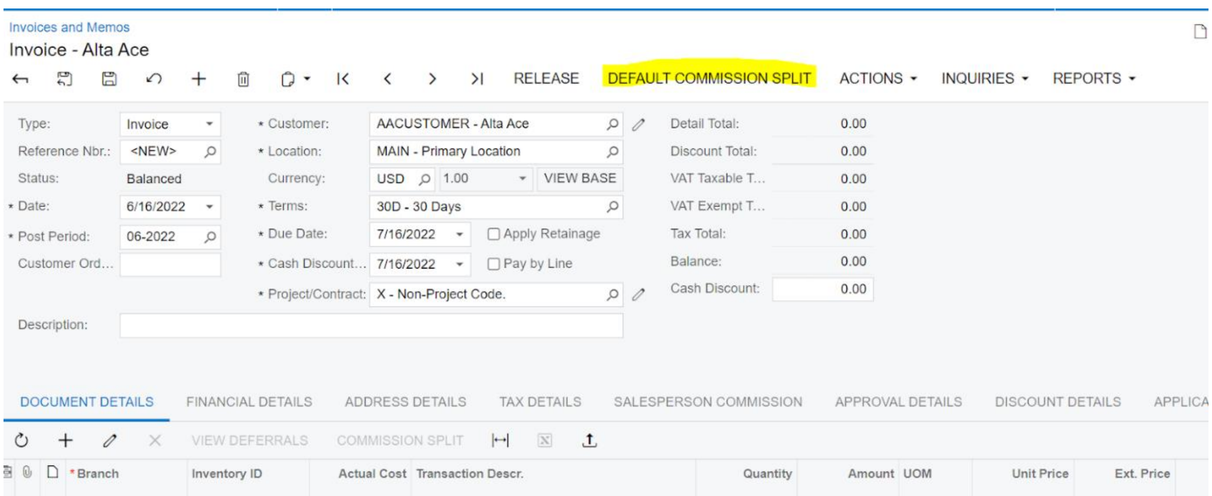
Plan is ready. If the GI is created outside of the Commission Plan screen, simply look up and select the applicable GI that you will use in the commission plan.

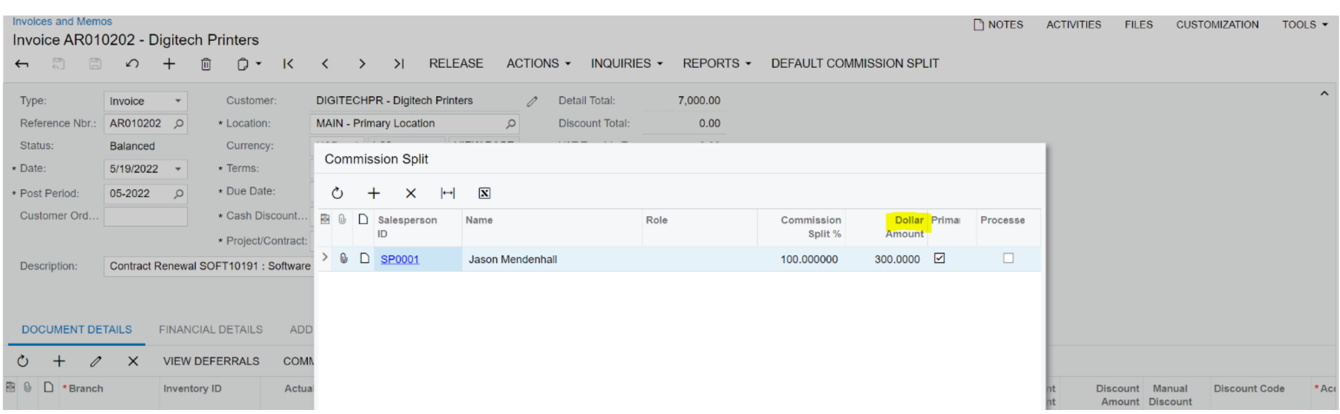
Assign Salespersons to the plan

Choose the necessary Salesperson from the list (AR2050PL) and on the Commission Plan the plan "Manager’s Commission Plan".

Create invoice

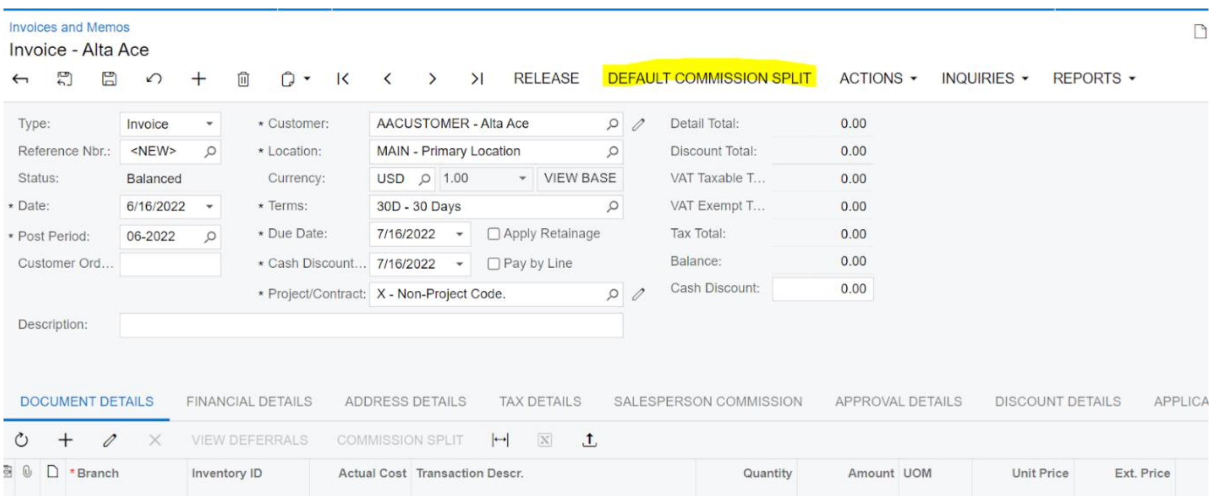
Create at least three invoices for illustrative purposes and specify Commission Split on each invoice line tab (which will default from the Customer record if already set up for this Customer). Please note, it is also necessary to enable the Primary checkbox.

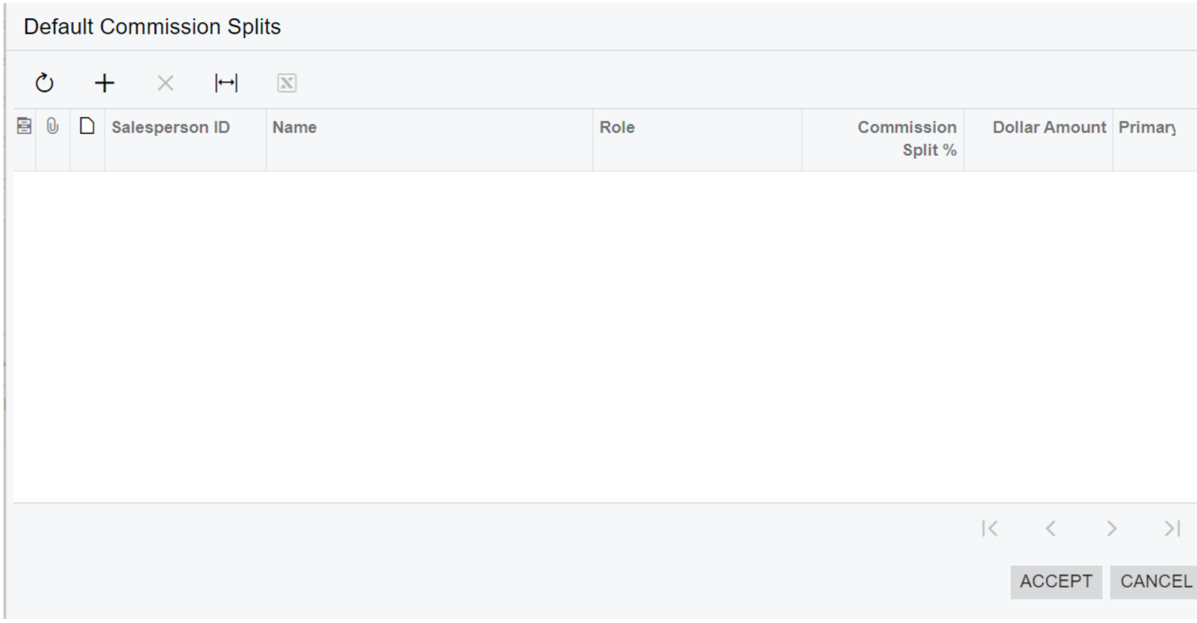




Dollar Amount is a decimal field that can be used to set a fixed value commission amount at the sales line item by Salesperson. The Dollar Amount can then be utilized to calculate a commission through a Commission Plan Generic Inquiry. Validation occurs to warn the user when the dollar amount of the split is greater than the invoice/sales order detail line amount.

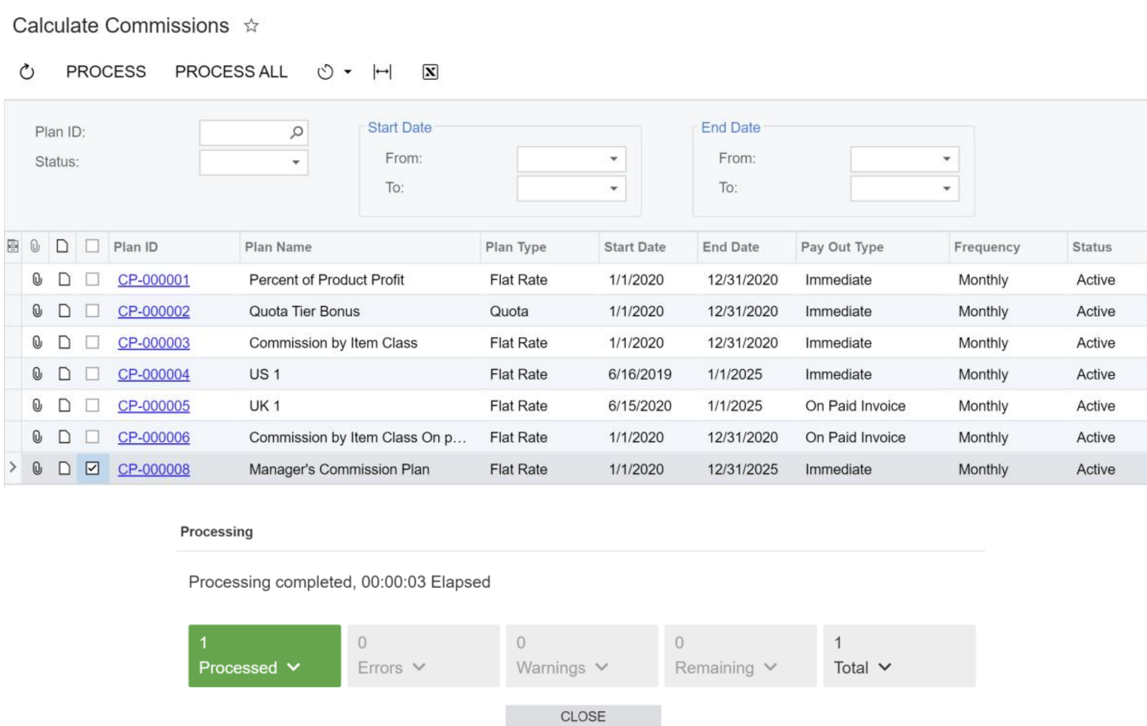
Default Commission Split button is used to auto-create commission entries for each detail line added to an invoice. Clicking the button will display a pop-up panel that can be used to default commission splits for new detail line items added to the invoice. If the user does not define any default commission splits, the system will use the standard **Commission Split** pop-up panel for each of the new detail line items added to the invoice. This button will only be enabled if the Customer and Location fields on the invoice have values.





Calculate commission

In the Calculate Commission (CWAC5010) form, check the “Manager’s Commission Plan” plan and process it.



Result

In the Commissions (CWAC4020) form we will now see that a commission has been created for the Sales Manager.

Commissions ☆ CUSTOMIZATION TOOLS

ACTIONS

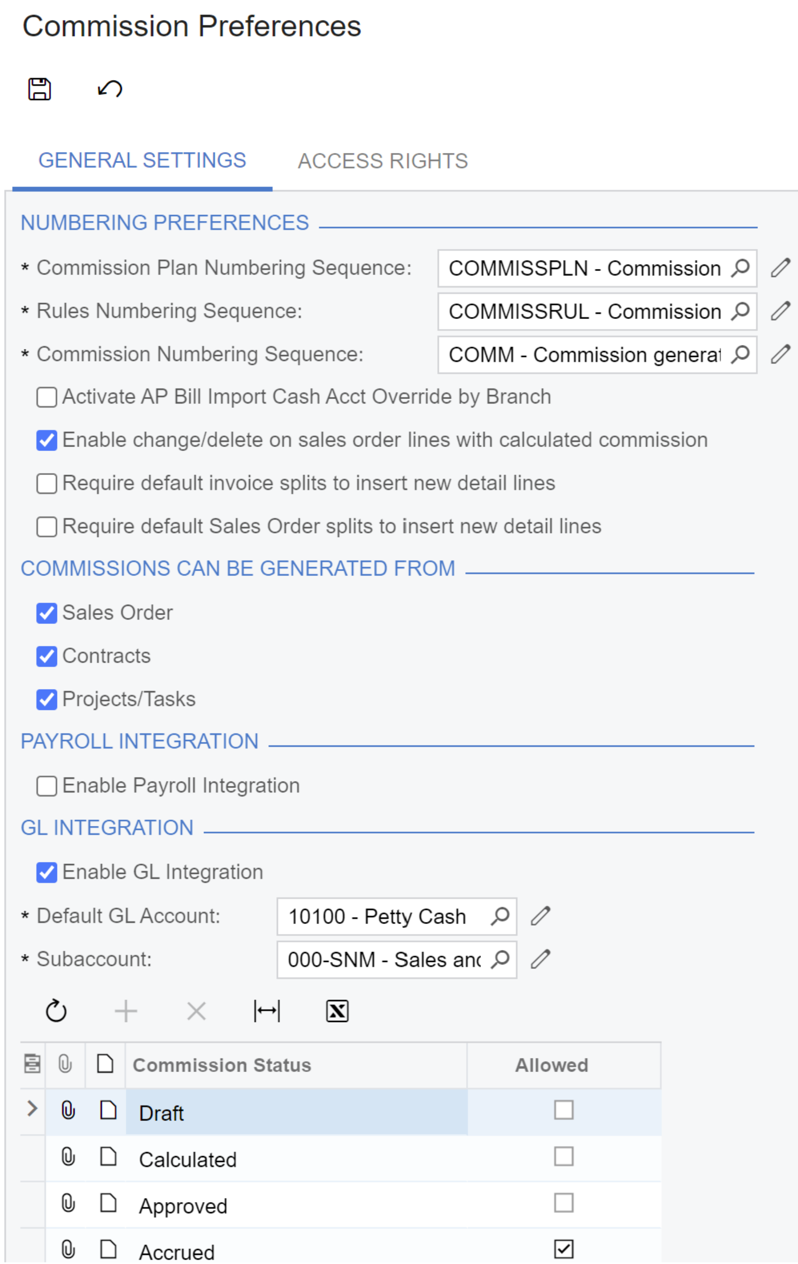
Drag column header here to configure filter

Commission ID	Commission Type	Salesperson ID	Salesperson Name	Plan ID	Commissionable Amount	Threshold	Invoice Ref. Nbr.	Commission Split %	Commission Amount
CO-000047	Commission	SP0001	Jason Mendenhall	CP-000003	3,000.00		AR008392	90.00	2,700.00
CO-000053	Commission	SP0001	Jason Mendenhall	CP-000003	1,500.00		AR008392	90.00	1,350.00
CO-000056	Commission	SP0001	Jason Mendenhall	CP-000003	1,000.00		AR008392	90.00	900.00
CO-000308	Commission	SP0001	Jason Mendenhall	CP-000004	11.74		AR008393	100.00	11.74
CO-000309	Commission	SP0001	Jason Mendenhall	CP-000004	11.74		AR008394	100.00	11.74
CO-000310	Commission	SP0001	Jason Mendenhall	CP-000004	10.00		AR008394	100.00	10.00
CO-000311	Commission	SP0001	Jason Mendenhall	CP-000004	20.00		AR008397	100.00	20.00
CO-000312	Commission	SP0001	Jason Mendenhall	CP-000004	10.00		AR008395	60.00	6.00
CO-000313	Commission	SP0001	Jason Mendenhall	CP-000004	20.00		AR008396	60.00	12.00
CO-000314	Commission	SP0002	Michal Bujacek	CP-000004	10.00		AR008395	40.00	4.00
CO-000315	Commission	SP0002	Michal Bujacek	CP-000004	20.00		AR008396	40.00	8.00
CO-000316	Commission	SP0006	Pam Brawner	CP-000005	11.74		AR008398	100.00	11.74
CO-000317	Commission	SP0006	Pam Brawner	CP-000005	10.00		AR008398	100.00	10.00
CO-000318	Commission	SP0001	Jason Mendenhall	CP-000004	20.00		AR008399	99.00	19.80
CO-000319	Commission	SP0002	Michal Bujacek	CP-000004	20.00		AR008399	1.00	0.20
CO-000320	Commission Adjustment	SP0006	Pam Brawner						-10.00
CO-000323	Commission	SP0001	Jason Mendenhall	CP-000004	20.00		AR008400	100.00	20.00

Form Reference Information

CWAC1010 Commission Preferences

Form ID: (CWAC1010)



You can use this form to configure the Commissions module to suit your business.

Form Toolbar

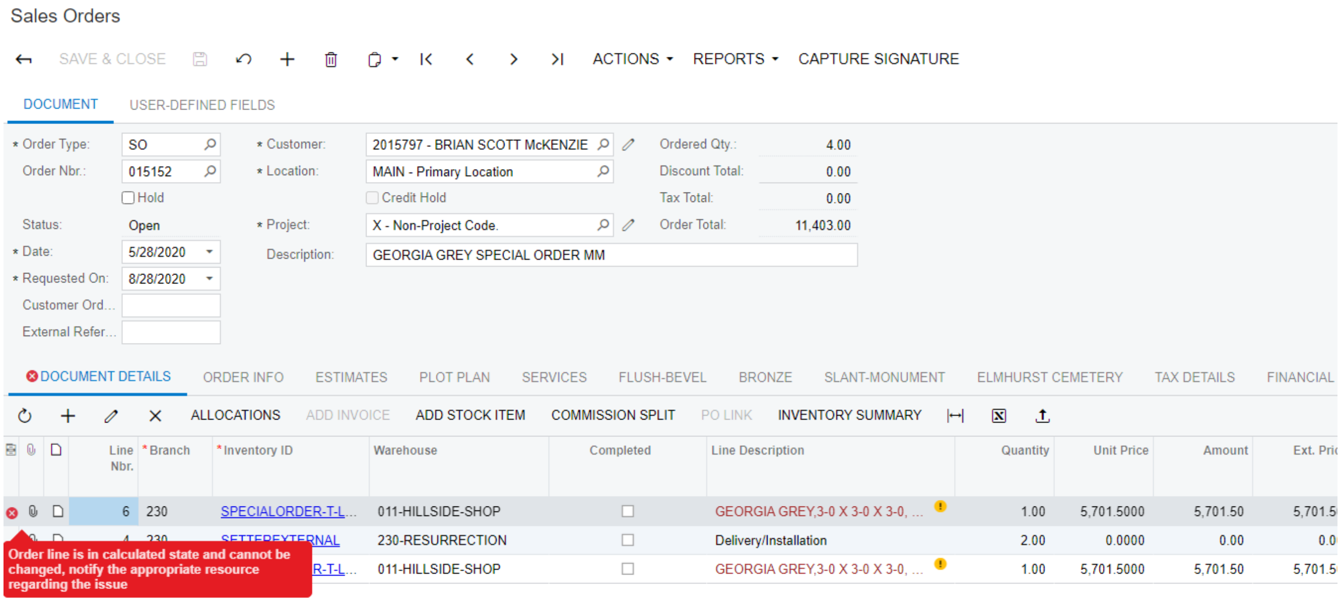
The form toolbar includes standard buttons. For the list of standard buttons, see [Form Toolbar](#).

General Settings Tab

Element	Description
Commission Plan Numbering Sequence	The unique ID of the numbering sequence, which is an alphanumeric string of up to 10 characters, is set in the NumberingSequences (CS201010) form and applied for Commission Plan.
Rules Numbering Sequence	The unique ID of the numbering sequence, which is an alphanumeric string of up to 10 characters, is set in the Numbering Sequences (CS201010) form and applied for Rules.
Commission Numbering Sequence	The unique ID of the numbering sequence, which is an alphanumeric string of up to 10 characters, is set in the Numbering Sequences (CS201010) form and applied for Commission.
Activate AP Bill Import Cash Acct Override by Branch	Controls the ability to have one Cash Account for assignment to the AP Bills created or by checking the box, enable Advanced Commissions to utilize a different Cash Account per Branch when AP Bills are created
Enable change/delete on sales order lines with the calculated commission	With the option disabled, if you try to delete or update an existing line with calculated commissions, you will receive the following error: Order line is in a calculated state and cannot be changed, notify the appropriate resource regarding the issue. If you turn on the Enable change/delete on sales order lines with the calculated commission's option you will get the following message when trying to delete the line: Removing this line will remove the associated calculated commission. See screenshots below for examples.
Require default invoice splits to insert new detail lines	If enabled, it requires the user to define a Default Commission Split that will be auto-applied to each new detail line added to the invoice. Once enabled, this setting will add a validation that locks adding new detail lines to the invoice if no Default Commission Split is defined.

Commissions Can Be Calculated From	If disabled, the commission split button will be hidden in the Sales Order screen and any new sales orders won't generate new commission splits (as a result, no commission will be generated in the following calculations). Already existing Sales Order commission splits and commissions won't be deleted, so commissions could be still generated from those. Only a new Sales Order after turning the checkbox off won't have any commissions generated. If the Projects option is disabled, the commission features will be hidden in the Projects screens and any new projects/tasks won't generate new commission splits hence no commission will be generated in the following calculations. Already existing projects/tasks commission splits and commissions won't be deleted so commissions could be still generated from those. Only new Projects/Tasks after turning the checkbox off won't have any commissions generated. If the Projects option is enabled the system will work as usual with commission splits visible from the Project/Task screen and commissions can be generated from there. If the Contracts option is disabled, the commission features will be hidden in the Contracts screens and any new Contracts won't generate new commission splits, hence no commission will be generated in the following calculations. Already existing Contracts commission splits and commissions won't be deleted, so commissions could be still generated from those. Only new Contracts after turning the checkbox off won't have any commissions generated. If the Contracts option is enabled the system will work as usual with commission splits visible from the Contracts screen and commissions can be generated from there.

Enable change/delete on sales order lines with calculated commissions messages:


Sales Orders
SAVE & CLOSE
ACTIONS
REPORTS
CAPTURE SIGNATURE
DOCUMENT
USER-DEFINED FIELDS
Order Type: SO
Order Nbr.: 015152
Hold
Status: Open
Date: 5/28/2020
Requested On: 8/28/2020
Customer Ord...
External Refer...
Customer: 2015797 - BRIAN SCOTT McKENZIE
Location: MAIN - Primary Location
Credit Hold
Project: X - Non-Project Code.
Description: GEORGIA GREY SPECIAL ORDER MM
Ordered Qty.: 4.00
Discount Total: 0.00
Tax Total: 0.00
Order Total: 11,403.00
DOCUMENT DETAILS
ORDER INFO
ESTIMATES
PLOT PLAN
SERVICES
FLUSH-BEVEL
BRONZE
SLANT-MONUMENT
ELMHURST CEMETERY
TAX DETAILS
FINANCIAL
ALLOCATIONS
ADD INVOICE
ADD STOCK ITEM
COMMISSION SPLIT
PO LINK
INVENTORY SUMMARY
Line Nbr.
Branch
Inventory ID
Warehouse
Completed
Line Description
Quantity
Unit Price
Amount
6 230 SPECIALORDER-T-L... 011-HILLSIDE-SHOP GEORGIA GREY,3-0 X 3-0 X 3-0, ... 1.00 5,701.5000 5,701.50
4 230 SETTEREXTERNAL 230-RESURRECTION Delivery/Installation 2.00 0.0000 0.00
011-HILLSIDE-SHOP GEORGIA GREY,3-0 X 3-0 X 3-0, ... 1.00 5,701.5000 5,701.50
Order line is in calculated state and cannot be changed, notify the appropriate resource regarding the issue

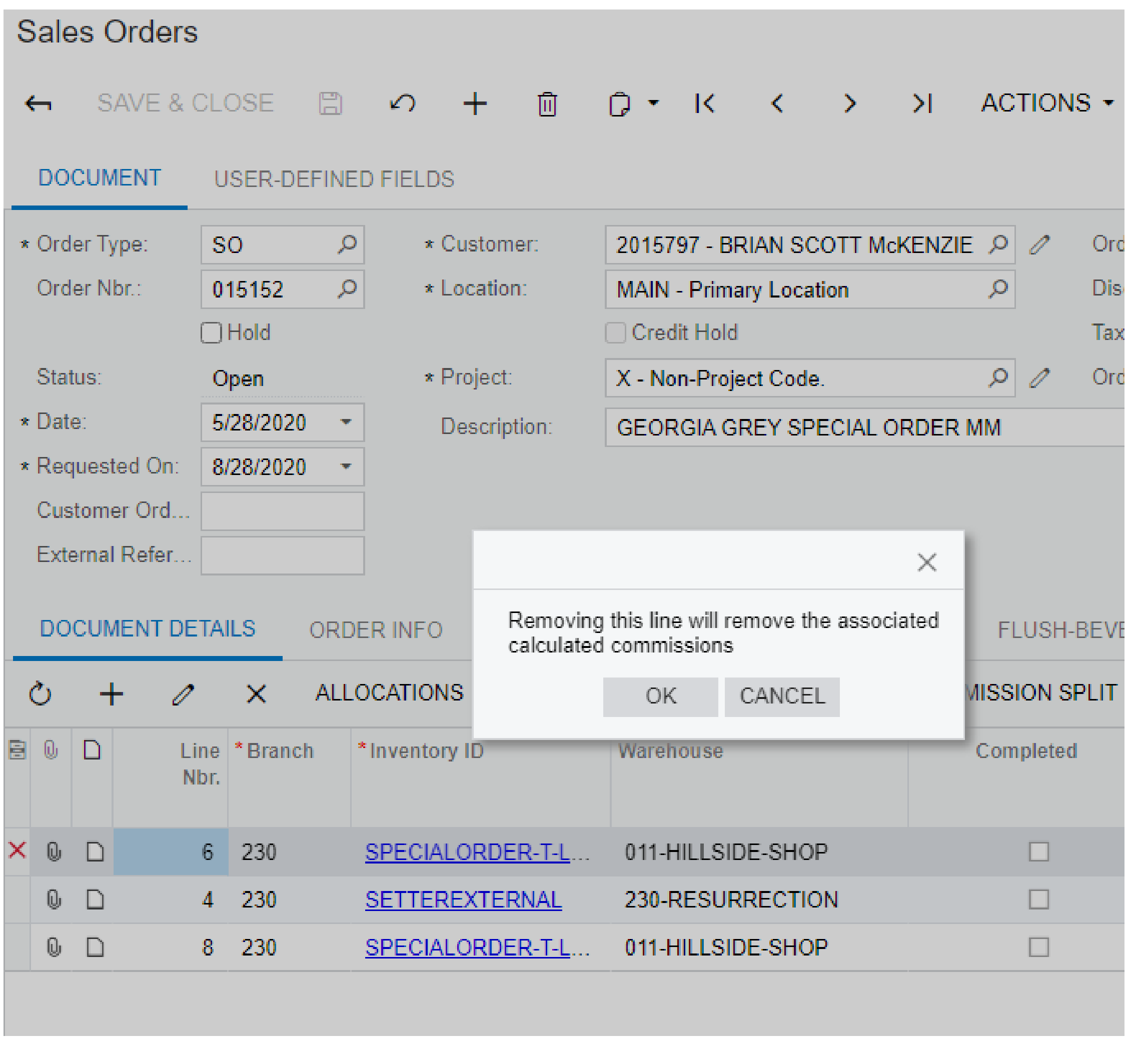
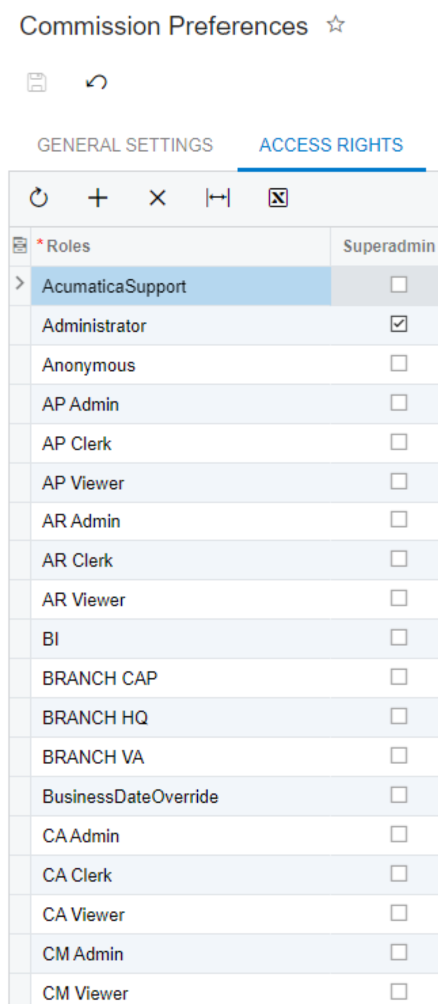

Sales Orders
SAVE & CLOSE
ACTIONS
DOCUMENT
USER-DEFINED FIELDS
Order Type: SO
Order Nbr.: 015152
Hold
Status: Open
Date: 5/28/2020
Requested On: 8/28/2020
Customer Ord...
External Refer...
Customer: 2015797 - BRIAN SCOTT McKENZIE
Location: MAIN - Primary Location
Credit Hold
Project: X - Non-Project Code.
Description: GEORGIA GREY SPECIAL ORDER MM
Removing this line will remove the associated calculated commissions
OK
CANCEL
DOCUMENT DETAILS
ORDER INFO
ALLOCATIONS
Line Nbr.
Branch
Inventory ID
Warehouse
Completed
6 230 SPECIALORDER-T-L... 011-HILLSIDE-SHOP
4 230 SETTEREXTERNAL 230-RESURRECTION
8 230 SPECIALORDER-T-L... 011-HILLSIDE-SHOP

Table Toolbar

The table toolbar includes standard buttons. For the list of standard buttons, see Table Toolbar.



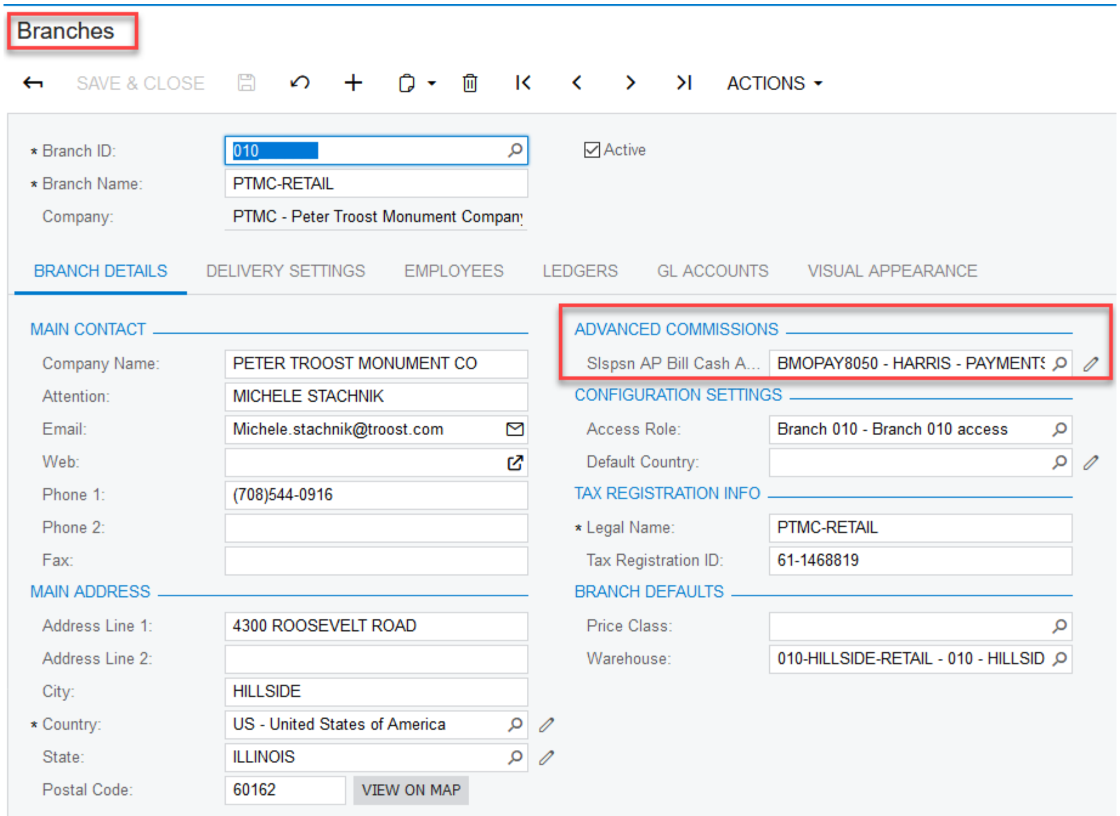
Access Rights Tab

Column	Description
Roles	In Acumatica ERP, access to information is controlled primarily by the roles assigned to the user who logs in to the system. Roles generally correspond to particular job assignments or functions of groups of users. When they log in, the users authenticate themselves, and the associated roles determine which system resources they may access. The list includes standard roles and specific roles for the Advanced Commissions Package. For the list of standard roles, see Built-In Roles in Role-Based Access and Project Security for the Project role. The specific roles described below will need to be configured within Acumatica since security and permissions are unique for each entity utilizing the Advanced Commissions module: • ***Commission Administrator:*** A user with this role can calculate and process system Commissions. This user can also add Commission Adjustments. • ***Plan Administrator:*** A user with this role can create Plans, tie Salespersons to the Commission Plans, and define splits between various Salespersons and Managers. • ***Salesperson:*** A user with this role can read a Commission Plan and enter the Commission Plans screen for viewing system-generated commissions and commission adjustments. • The Security Roles can also be modified to your company-specific requirements.
Superadmin	Role with the checkbox selected can see all Commissions and Commission Plans on the Commission Plans, Commission Plan, Calculate Commissions, Commissions, Execute Commissions, Pay Commissions, Commission Adjustment screens if they also have access to the screens by their Role or User rights. Check the box for Superadmin for any Role that you would like the users associated with that role to be Superadmins.

AP Bill Cash Account Branch Setup

Form ID: (CS.10.20.00)

The **Salesperson AP Bill Cash Account** field is used to assign a different cash account at the Branch level that will be assigned as the AP Bills are created. Populating this field will override the default Vendor cash account if the Vendor bill is tied to the given Branch. This field is only visible if **Activate AP Bill Import Cash Acct Override by Branch** is checked on the **Commission Preferences** form.



CWAC3010 Commission Adjustment

Form ID: (CWAC3010)

You can use this form to make Commission Adjustments. They are not directly tied to any existing Commissions, but they are tied to a Salesperson as if it was an additional Commission for Salesperson. They have the same statuses as Commissions and can be processed similarly. Additionally, they are visible in reports in the same way as Commissions. Due to a lack of relation to a Commission Plan and more specifically the Frequency and Payout, they are not changed automatically from Approved to Accrued and from Accrued to Ready for Payment statuses. Instead, they can be edited, and their status can be changed manually by the user. Unlike Commissions, Adjustments can be edited and deleted until their status is set to Paid.

Form Toolbar

The form toolbar includes only standard buttons. For the list of standard buttons, see Form Toolbar.

Summary Area

In this area, you specify summary information for a new Commission Adjustment.

Element	Description
Adjustment ID	The unique reference number of the Adjustment, which the system automatically assigns according to parameters set in the Numbering Sequences (CS201010) form.
Status	The Commission Adjustment can have one or five statuses: calculated, approved, accrued, ready for payment, and paid.
Adjustment Date	The date when Adjustment is created. Can be changed manually by the user.
Adjustment Amount	The required amount for the adjustment.
Salesperson ID	The unique identifier of the Salesperson. The user chooses the Salesperson from the predefined list, which is prepared in the Salespersons (AR2050PL) form.
Reason Code	The identifier of the reason code. There is one default Reason Code for Commission Adjustments: COMMADJ. Users can add as many reason codes for Adjustments as they want.
Reason Code Description	A description of the reason code. There is one default Description: Commission Adjustment, and it can be modified by the user.
Commission ID	The unique reference number of the Commission, which the system automatically assigns according to parameters set in the Numbering Sequences (CS201010) form.
Plan ID	The unique reference number of the Plan, which the system automatically assigns according to parameters set in the Numbering Sequences (CS201010) form.

CWAC4010 Commission Plan

Form ID: (CWAC4010)

You can use this form to create a new Commission Plan or edit an existing one.

Form Toolbar

The form toolbar includes standard buttons. For the list of standard buttons, see Form Toolbar.

Summary Area

In this area, you can select an existing commission plan by its reference number.

Element	Description
Plan ID	The unique reference number of the Plan, which the system automatically assigns according to parameters set in the Numbering Sequences (CS201010) form.
Is Active	A checkbox that indicates (if selected) that the Commission Plan is Active.
Plan Name	The Plan's name as it should appear on the documents.
Start Date	The date when the commission plan comes into effect.
End Date	The date when the commission plan is expired.
Plan Type	Two options are available: • **Flat Rate:** the commission for the Flat Rate Plan is applied one time and is based on a flat commission. • **Quota:** the plan is based on meeting a particular sales revenue level or target and accumulates for each sale until the predefined revenue target or quota goal is reached. If this option is set, the Minimum column appears on the Rules tab.
Pay Out Type	Two options are available: • **Immediate:** commission can be paid at any time according to the selected frequency and regardless of the status of the document, which forms the basis for the commission calculation. • **On Paid Invoice:** the commission is paid once the invoice that the commission was calculated from is paid in full.
Commission Value Type	Two options are available: • **Expression Builder**: functionality to build rules and calculations. With the expression builder, the conditions and the commission rate can be defined directly on the Commission Plan Form. For details on the functions that can be used in the formulas, please refer to Formulas. • **Generic Inquiry**: an Acumatica ERP form based on a query that collects data from the Acumatica ERP database and displays the query results. For more details on configuring a generic inquiry, see Generic Inquiry (SM208000) form.

Frequency	Three options are available: • Monthly • Quarterly • Yearly
Target	A value that is calculated according to the Generic Inquiry conditions, parameters, etc. If the value is greater than or equal to the minimum value specified in the Rules tab, a commission record is created for the value associated with the minimum value that is met.
Commission Type	The way the commission will be calculated. Two options are available: • **Generic inquiry:** you need to specify the source and calculation formula in an Inquiry. • **Flat Amount:** you can apply a fixed commission.

Table Toolbar

The table toolbar includes standard buttons. For the list of standard buttons, see Table Toolbar.

Rules Tab

This tab has a table with the rules included in the commission plan. The following table summarizes the elements in this area.

Column	Description
Rule ID	Auto-numbered according to Numbering Sequence in the Commission Plan Preferences screen.
Min	The quota value that a salesperson needs to meet to trigger the Plan calculation. The Minimum column appears on the Rules tab when the Quota option is set in the summary area.
Value	**The Value** will be based on the Plan Type parameters selected in the summary area: • If Plan Type is **Flat Rate** and Commission Value Type is **Generic Inquiry**, the Value is a lookup field with the list of available Generic Inquiries. • If Plan Type is **Flat Rate** and Commission Value Type is **Expression Builder**, the Value is an Expression Builder field. Expression Builder is a formula, created directly in the plan, to calculate the commission based on the source values and filters and can be a flat rate. Click the field to open the Formula Editor dialog box and create a formula. For details on the functions that can be used in the formula, see Formulas. • If Plan Type is **Quota** and Commission Type is **Flat Amount**, the Value is numeric. • If Plan Type is **Quota** and Commission Type is **Generic Inquiry**, the Value is a lookup field with the list of available Generic Inquiries.

Condition	The source of the sale is to be calculated into the commission or additional filters for it. This is an optional field. The Condition column appears on the Rules tab if in the summary area parameters were selected with a Plan Type of **Flat Rate** and Commission Value Type equal to **Expression Builder**.

CWAC4030 Commission Plans

Form ID: (CWAC4030)

You can use this form to create a new Commission Plan (see Commission Plans (CWAC4010) form) and view all the existing Commission Plans.

Table Toolbar

The table toolbar includes standard buttons. For the list of standard buttons, see Table Toolbar.

Filtering Area

A table on an Acumatica ERP form, tab, or dialog box can have a filtering area, which you can use to filter the objects in the table. For a detailed description, see Filtering Area.

Summary Area

This area contains general information about the Commission Plans. The following table summarizes the elements in this area.

Element	**Description**
Plan ID	The unique ID of the numbering sequence, which is an alphanumeric string of up to 10 characters, is set in the Numbering Sequences (CS201010) form and applied for Commission Plan.
Plan Name	The Plan's name as it should appear on documents.
Plan Type	Two options are available: • **Flat Rate:** The commission for the Flat Rate Plan is applied one time and is based on a flat commission • **Quota:** The plan is based on meeting a particular sales revenue level or target and accumulates for each sale until the predefined revenue target or quota goal is reached.
Start Date	The date when the commission plan comes into effect.
End Date	The date when the commission plan is expired.

Element	Description
Frequency	Three options are available: • Monthly • Quarterly • Yearly One shows commissions based on a plan with selected Frequency.
Pay Out Type	Two options are available: • Immediate • On Paid Invoice One shows commissions based on a plan with selected Pay Out Type.

CWAC4020 Commissions

Form ID: (CWAC4020)

You can use this form to view all the commissions created by the Advanced Commissions module. This form can also be used for creating or viewing a commission adjustment. You can also mark a commission or commission adjustment as 'Ready for Payment,' allowing the commission to be processed through the Pay Commissions form at a later time.

Form Toolbar

The form toolbar includes a standard and form-specific button. For the list of standard buttons, see Form Toolbar. The form-specific button is described below.

Button	Description
Actions	The Actions provides the following menu commands: • **Commission Adjustment:** Navigate to the Commission Adjustment (CWAC3010) form, which you use to create a new commission adjustment. • **Mark Ready for Payment:** Changes the status of Commission or Adjustment to "Ready for Payment". • **View Adjustment:** Opens the Commission Adjustment (CWAC3010) form for the selected existing adjustment record.

Filtering Area

A table on an Acumatica ERP form, tab, or dialog box can have a filtering area, which you can use to filter the objects in the table. For a detailed description, see Filtering Area.

Summary Area

This area contains general information about the commissions. The following table summarizes the elements in this area.

Element	Description
Commission ID	The reference number of the Commission document in the system.
Commission Type	Two types are possible: • Commission: a record created from the Calculate Commissions form • Commission Adjustment: a record created from the Commission Adjustment form
Salesperson name	The salesperson's name as it should appear on documents.
Plan ID	The reference number of the Plan document in the system.
Commissionable Amount	The total amount of commission that is to be paid for all Salespersons assigned to the Plan. It is calculated as Commission Amount divided by the Commission Split % for the specified Salesperson.
Threshold	The minimum amount set up on Quota Plans
Invoice Ref. Nbr.	The reference number of the Invoice document in the system
Salesperson ID	The unique identifier of the salesperson assigned to the Commission Plan.
Commission Split %	The percent of commission to be used for the salesperson.
Inventory ID	The unique alphanumeric identifier of the stock or non-stock item.
Commission Amount	The amount to be paid to the salesperson.
Commission Status	Five options are available depending on the current commission's status: • Calculated • Approved • Accrued • Ready for Payment • Paid
Pay Out Type	Two options are available: • Immediate • On Paid Invoice

Plan Type	Two options are available: • Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission • Quota: The plan is based on meeting a particular sales revenue level or target and accumulates for each sale until the predefined revenue target or quota goal is reached.
Frequency	Three options are available: • Monthly • Quarterly • Yearly
Reason Code	The identifier of the reason code.
Reason Code Description	A description of the reason code.
Commission Date	The date the commission is created.
Customer	The Customer ID associated with the document.
Date	The date when the Accounts Receivable document was created.
Doc Description	The user-provided description of the Accounts Receivable document.
Type	A type of Accounts Receivable document.
Tran Project ID	The particular task of the project with which this document line is associated.
Order Nbr.	The reference number of the Sales Order document.
Project Task	The particular task of the project with which this document line is associated.
Invoice Document Type	The document type. The following types are available: • Invoice: A document that contains a list of goods sold or services provided. • Debit Memo: A document that debits a customer for any business reason, such as undercharging for a previous invoice. • Credit Memo: A document that credits a customer for any business reason such as damaged goods or a previous overcharging invoice. • Overdue Charge: A document that lists overdue charges to be paid on an outstanding document that is past due. The option is available if the Overdue Charges feature has been enabled on the Enable/Disable Features (CS100000) form. • Credit WO: A document that writes off a small credit of the customer.
Amount	The amount of the Accounts Receivable document after taxes and discounts.
Base Qty.	The quantity of the item sold to a customer expressed in the base unit of measurement.
Closed Period	The period to which the Invoice document should be posted.
Cost	The current cost for the Item defined on Stock/Non-Stock Item forms

Doc. Bal.	For an open Accounts Receivable document, the outstanding balance after any payments have been applied.
Document Date	The date when the Accounts Receivable document was created.
Due Date	The date when payment for the Accounts Receivable document is due, per the credit terms.
Ext. Cost	Auto-generated field by the System based on the value of the Cost field.
Invoice Doc Class	Auto-generated field by the System based on the respective Invoice.
Last Payment Date	The date of the payment application.
Margin	Auto-generated field by the System based on the respective AR Document.
Margin Percent	Auto-generated field by the System based on the respective AR Document.
Payment Total	Auto-generated field by the System based on the respective AR Document
Quantity	The quantity of the item sold to the customer expressed in the unit of measurement specified in the UOM column.
Tran Amt	The total amount the system has calculated for the specified quantity of items or services of this type.
Tran Class	Auto-generated field by the System based on the respective AR Document.
Tran Disc Amt	The amount of the line-level discount that has been applied to this line.
Tran Ext. Price	The extended price, which is either the unit price multiplied by the quantity or a manually entered amount that may not be equal to the product of the unit price and the quantity.
Tran Fin Period ID	Auto-generated field by the System based on the respective AR Document.
Tran Period ID	Auto-generated field by the System based on the respective AR Document.
Tran Released	Two options are available: • True: the transaction was released • False: the transaction was not released
Tran Tax Amt	The tax amount for the specific tax, which is calculated at the document level.
Tran Unit Cost	Auto-generated field by the System based on the respective AR Document.
Tran Unit Price	The unit price set for the item or service.
Transaction Descr.	Any comments relevant to the transaction.
UOM	The unit of measurement (UOM) for the item.

CWAC5010 Calculate Commissions

Form ID: (CWAC5010)

You can use this form to create the commission calculations based on the rules specified in Commission Plans.

Table Toolbar

The table toolbar includes standard buttons and buttons specific to this form. For the list of standard buttons, see Form Toolbar.

Button	Description
Process	Initiates the calculations for the documents you have selected in the table.
Process All	Initiates the calculations for all documents listed in the table.

Summary Area

Element	Description
Plan ID	The lookup filter for the Plan document reference number in the system.
Status	Selector field. Two options for Commission Plans statuses are available: • Active • Inactive
Start Date	Calendar fields: • From: the earliest date of Commission Plan start date • To: the latest date of Commission Plan start date
End Date	Calendar fields: • From: the earliest date of Commission Plan end date • To: the latest date of Commission Plan end date

Table Columns

Column	Description
Plan ID	The reference number of the Plan document in the system.
Plan Name	The Plan's name as it should appear on documents.
Plan Type	Two options are available: • Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission. • Quota: The plan is based on meeting a particular sales revenue level or target and accumulates for each sale until the predefined revenue target or quota goal is reached.
Start Date	The start date applied to the Plan on the CWAC4010 Commission Plan form.
End Date	The end date applied to the Plan on the CWAC4010 Commission Plan form.
Pay Out Type	Two options are available: • Immediate • On Paid Invoice
Frequency	Three options are available: • Monthly • Quarterly • Yearly
Status	Status of the Commission Plan as listed on the Commission Plan form CWAC4010

CWAC5020 Approve Commissions

Form ID: (CWAC5020)

You can use this form to approve commissions and move the Commissions or Commission Adjustments to the approved status.

Form Toolbar

The form toolbar includes standard buttons and buttons specific to this form. For the list of standard buttons, see Form Toolbar.

Button	Description
Process	Approves the documents you have selected in the table.
Process All	Approves all documents listed in the table.

Summary Area

Element	Description
Commission Date	Calendar fields: • From: the earliest date when the Commission was created • To: the latest date when the Commission was created
Plan ID	The lookup filter is the reference number of the Plan document in the system.
Salesperson ID	The salesperson's name as it should appear on documents.
Frequency	Three options are available: • Monthly • Quarterly • Yearly
Pay Out Type	Two options are available: • Immediate • On Paid Invoice

Table Columns

Element	Description
Commission ID	The reference number for the Commission document in the system.
Commission Type	Two types are available: • Commission: a record created from the Commission Plan form • Commission Adjustment: a record created from the Commission Adjustment form
Salesperson name	The salesperson's name as it should appear on documents.
Plan ID	The reference number of the Plan document in the system.
Commissionable Amount	The total amount of commission that is to be paid for all the Salespersons assigned to the Plan. It is calculated as Commission Amount divided by the Commission Split % for the specified Salesperson.
Threshold	The minimum amount set up on Quota Plans.
Invoice Ref. Nbr.	The reference number of the Invoice document in the system.
Salesperson ID	The unique identifier of the salesperson assigned to the Commission Plan.
Commission Split %	The percent of commission to be used for the salesperson.
Inventory ID	The unique alphanumeric identifier of the stock or non-stock item.

Commission Amount	The amount to be paid to the salesperson.
Commission Status	Five options are available depending on the current commission's status: • Calculated • Approved • Accrued • Ready for Payment • Paid
Pay Out Type	Two options are available: • Immediate • On Paid Invoice
Plan Type	Two options are available: • Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission • Quota: The plan is based on meeting a particular sales revenue level or target and accumulates for each sale until the predefined revenue target or quota goal is reached.
Frequency	Three options are available: • Monthly • Quarterly • Yearly
Reason Code	The identifier of the reason code.
Reason Code Description	A description of the reason code.
Commission Date	The date the commission is created.
Customer	The Customer ID associated with the document.
Date	The date the Accounts Receivable document was created.
Doc Description	Any user-provided description defined on the Accounts Receivable document.
Type	A type of Accounts Receivable document.
Tran Project ID	The particular project, to which this document line is associated.
Order Nbr.	The reference number of the Sales Order document.
Project Task	The particular task of the project with which this document line is associated.

Invoice Document Type	The document type. The following types are available: • Invoice: A document that contains a list of goods sold or services provided. • Debit Memo: A document that debits a customer for any business reason, such as undercharging for a previous invoice. • Credit Memo: A document that credits a customer for any business reason such as damaged goods or a previous overcharging invoice. • Overdue Charge: A document that lists overdue charges to be paid on an outstanding document that is past due. The option is available if the Overdue Charges feature has been enabled on the Enable/Disable Features (CS100000) form. • Credit WO: A document that writes off a small credit of the customer.
Amount	The amount of the Accounts Receivable document after taxes and discounts.
Base Qty.	The quantity of the item sold to customers expressed in the base unit of measure.
Closed Period	The period to which the Invoice document should be posted.
Cost	Current cost for the Item defined on Stock/Non-Stock Item forms.
Doc.Bal.	For an open Accounts Receivable document, the outstanding balance after any payments were applied.
Document Date	The date when the Accounts Receivable document was created.
Due Date	The date when payment for the Accounts Receivable document is due, per the credit terms.
Ext. Cost	Auto-generated field by the System based on the value of the Cost field.
Invoice Doc Class	Auto-generated field by the System based on the respective Invoice.
Last Payment Date	The date of the payment application.
Margin	Auto-generated field by the System based on the respective AR Document.
Margin Percent	Auto-generated field by the System based on the respective AR Document.
Payment Total	Auto-generated field by the System based on the respective AR Document.
Quantity	The quantity of the item sold to the customer expressed in the unit of measurement specified in the UOM column.
Tran Amt	The total amount the system has calculated for the specified quantity of items or services of this type.
Tran Class	Auto-generated field by the System based on the respective AR Document.
Tran Disc Amt	The amount of the line-level discount that has been applied to this line.
Tran Ext. Price	The extended price, which is either the unit price multiplied by the quantity or a manually entered amount that may not be equal to the product of the unit price and the quantity.

Tran Fin Period ID	Auto-generated field by the System based on the respective AR Document.
Tran Period ID	Auto-generated field by the System based on the respective AR Document
Tran Released	Two options are available: • True: the transaction was released • False: the transaction was not released
Tran Tax Amt	The tax amount for the specific tax, which is calculated at the document level.
Tran Unit Cost	Auto-generated field by the System based on the respective AR Document.
Tran Unit Price	The unit price set for the item or service.
Transaction Descr.	Any comments relevant to the transaction.
UOM	The unit of measurement (UOM) for the item.

CWAC5030 Pay Commissions

Form ID: (CWAC5030)

You can use this form to initiate commission payments.

Form Toolbar

The form toolbar includes standard buttons and buttons specific to this form. For the list of standard buttons, see Form Toolbar.

Button	Description
Process	Initiates the payment of the documents you have selected in the table.
Process All	Initiates the payment of all documents listed in the table.

Element	Description
Commission Date	Calendar fields: • From: the earliest date when Commission was created • To: the latest date when Commission was created
Plan ID	The reference number for the Plan document in the system.
Salesperson ID	The salesperson's name as it should appear on documents.
Frequency	Three options are available: • Monthly • Quarterly • Yearly
Pay Out Type	Two options are available: • Immediate • On Paid Invoice

Table Columns

Element	Description
Commission ID	The reference number of the Commission document in the system.
Commission Type	Two types are possible: • Commission: a record created from the Calculate Commissions form • Commission Adjustment: a record created from the Commission Adjustment form
Salesperson name	The salesperson's name as it should appear on documents.

Plan ID	The reference number of the Plan document in the system.
Commissionable Amount	The total amount of commission that is to be paid for all Salespersons assigned to the Plan. It is calculated as Commission Amount divided by the Commission Split % for the specified Salesperson.
Threshold	The minimum amount set up on Quota Plans
Invoice Ref. Nbr.	The reference number of the Invoice document in the system
Salesperson ID	The unique identifier of the salesperson assigned to the Commission Plan.
Commission Split %	The percent of commission to be used for the salesperson.
Inventory ID	The unique alphanumeric identifier of the stock or non-stock item.
Commission Amount	The amount to be paid to the salesperson.
Commission Status	Five options are available depending on the current commission's status: • Calculated • Approved • Accrued • Ready for Payment • Paid
Pay Out Type	Two options are available: • Immediate • On Paid Invoice One shows commissions based on a plan with selected Pay Out Type
Plan Type	Two options are available: • Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission • Quota: The plan is based on meeting a particular sales revenue level or target and accumulates for each sale until the predefined revenue target or quota goal is reached.
Frequency	Three options are available: • Monthly • Quarterly • Yearly
Reason Code	The identifier of the reason code
Reason Code Description	A description of the reason code.
Commission Date	The date of commission is created
Customer	The Customer ID associated with the document.

Date	The date when the Accounts Receivable document was created.
Doc Description	Any user-provided description of the Accounts Receivable document.
Type	A type of Accounts Receivable document.
Tran Project ID	The particular task of the project with which this document line is associated.
Order Nbr.	The reference number of the Sales Order document
Project Task	The particular task of the project with which this document line is associated.
Invoice Document Type	The document type. The following types are available: • Invoice: A document that contains a list of goods sold or services provided. • Debit Memo: A document that debits a customer for any business reason, such as undercharging for a previous invoice. • Credit Memo: A document that credits a customer for any business reason such as damaged goods or a previous overcharging invoice. • Overdue Charge: A document that lists overdue charges to be paid on an outstanding document that is past due. The option is available if the Overdue Charges feature has been enabled on the Enable/Disable Features (CS100000) form. • Credit WO: A document that writes off a small credit of the customer.
Amount	The amount of the Accounts Receivable document after taxes and discounts.
Base Qty.	The quantity of the item sold to the customer expressed in the base unit of measurement.
Closed Period	The period to which the Invoice document should be posted.
Cost	The current cost for the Item defined on Stock/Non-Stock Item forms
Doc.Bal.	For an open Accounts Receivable document, the outstanding balance after any payments have been applied.
Document Date	The date when the Accounts Receivable document was created.
Due Date	The date when payment for the Accounts Receivable document is due, per the credit terms.
Ext. Cost	Auto-generated field by the System based on the value of the Cost field.
Invoice Doc Class	Auto-generated field by the System based on the respective Invoice.
Last Payment Date	The date of the payment application.
Margin	Auto-generated field by the System based on the respective AR Document.
Margin Percent	Auto-generated field by the System based on the respective AR Document.
Payment Total	Auto-generated field by the System based on the respective AR Document
Quantity	The quantity of the item sold to the customer expressed in the unit of measurement specified in the UOM column.

Tran Amt	The total amount the system has calculated for the specified quantity of items or services of this type.
Tran Class	Auto-generated field by the System based on the respective AR Document.
Tran Disc Amt	The amount of the line-level discount that has been applied to this line.
Tran Ext. Price	The extended price, which is either the unit price multiplied by the quantity or a manually entered amount that may not be equal to the product of the unit price and the quantity.
Tran Fin Period ID	Auto-generated field by the System based on the respective AR Document.
Tran Period ID	Auto-generated field by the System based on the respective AR Document.
Tran Released	Two options are available: • True: the transaction was released • False: the transaction was not released
Tran Tax Amt	The tax amount for the specific tax, which is calculated at the document level.
Tran Unit Cost	Auto-generated field by the System based on the respective AR Document.
Tran Unit Price	The unit price set for the item or service.
Transaction Descr.	Any comments relevant to the transaction.
UOM	The unit of measurement (UOM) for the item.

CWAC5040 Process Commissions

Form ID: (CWAC5040)

You can use this form to select and process a commission. The Process will move Accrued and Approved Commissions to the next stage.

Form **Toolbar**

The form toolbar includes standard buttons and buttons specific to this form. For the list of standard buttons, see Form Toolbar.

Button	Description
Process	Initiates the processing for the documents you have selected in the table.
Process All	Initiates the processing for all documents listed in the table.

Table Columns

Element	**Description**
Commission ID	The reference number of the Commission document in the system.
Commission Type	Two types are possible: • Commission: a record created from the Commission Plan form • Commission Adjustment: a record created from the Commission Adjustment form
Salesperson name	The salesperson's name as it should appear on documents.
Plan ID	The reference number of the Plan document in the system.
Commissionable Amount	The total amount of commission that is to be paid for all Salespersons assigned to the Plan. It is calculated as Commission Amount divided by the Commission Split % for the specified Salesperson.
Threshold	The minimum amount set up on Quota Plans
Invoice Ref. Nbr.	The reference number of the Invoice document in the system
Salesperson ID	The unique identifier of the salesperson assigned to the Commission Plan.
Commission Split %	The percent of commission to be used for the salesperson.
Inventory ID	The unique alphanumeric identifier of the stock or non-stock item.
Commission Amount	The amount to be paid to the salesperson.
Commission Status	Five options are available depending on the current commission's status: • Calculated • Approved • Accrued • Ready for Payment • Paid
Pay Out Type	Two options are available: • Immediate • On Paid Invoice
Plan Type	Two options are available: • Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission • Quota: The plan is based on meeting a particular sales revenue level or target and accumulates for each sale until the predefined revenue target or quota goal is reached.

Frequency	Three options are available: • Monthly • Quarterly • Yearly
Reason Code	The identifier of the reason code
Reason Code Description	A description of the reason code.
Commission Date	The date the commission is created
Customer	The Customer ID associated with the document.
Date	The date the Accounts Receivable document was created.
Doc Description	Any user-provided description of the Accounts Receivable document.
Type	A type of Accounts Receivable document.
Tran Project ID	The particular project with which this document line is associated.
Order Nbr.	The reference number of the Sales Order document
Project Task	The particular task of the project with which this document line is associated.
Invoice Document Type	The document type. The following types are available: • Invoice: A document that contains a list of goods sold or services provided. • Debit Memo: A document that debits a customer for any business reason, such as undercharging for a previous invoice. • Credit Memo: A document that credits a customer for any business reason such as damaged goods or a previous overcharging invoice. • Overdue Charge: A document that lists overdue charges to be paid on an outstanding document that is past due. The option is available if the Overdue Charges feature has been enabled on the Enable/Disable Features (CS100000) form. • Credit WO: A document that writes off a small credit of the customer.
Amount	The amount of the Accounts Receivable document after taxes and discounts.
Base Qty.	The quantity of the item sold to customers expressed in the base unit of measurement.
Closed Period	The period to which the Invoice document should be posted.
Cost	The current cost for the Item defined on Stock/Non-Stock Item forms
Doc.Bal.	For an open Accounts Receivable document, the outstanding balance after any payments have been applied.
Document Date	The date when the Accounts Receivable document was created.
Due Date	The date when payment for the Accounts Receivable document is due, per the credit terms.
Ext. Cost	Auto-generated field by the System based on the value of the Cost field.

Invoice Doc Class	Auto-generated field by the System based on the respective Invoice.
Last Payment Date	The date of the payment application.
Margin	Auto-generated field by the System based on the respective AR Document.
Margin Percent	Auto-generated field by the System based on the respective AR Document.
Payment Total	Auto-generated field by the System based on the respective AR Document
Quantity	The quantity of the item sold to the customer expressed in the unit of measurement specified in the UOM column.
Tran Amt	The total amount the system has calculated for the specified quantity of items or services of this type.
Tran Class	Auto-generated field by the System based on the respective AR Document.
Tran Disc Amt	The amount of the line-level discount that has been applied to this line.
Tran Ext. Price	The extended price, which is either the unit price multiplied by the quantity or a manually entered amount that may not be equal to the product of the unit price and the quantity.
Tran Fin Period ID	Auto-generated field by the System based on the respective AR Document.
Tran Period ID	Auto-generated field by the System based on the respective AR Document.
Tran Released	Two options are available: • True: the transaction was released • False: the transaction was not released
Tran Tax Amt	The tax amount for the specific tax, which is calculated at the document level.
Tran Unit Cost	Auto-generated field by the System based on the respective AR Document.
Tran Unit Price	The unit price set for the item or service.
Transaction Descr.	Any comments relevant to the transaction.
UOM	The unit of measurement (UOM) for the item.

Advanced Commissions AR3010PL Invoices and Memos Form Changes

Invoices and Memos

Form ID: (AR301000)

You can use this form to create, view, and modify Accounts Receivable invoices, memos, and other documents. You may also assign multiple Salespersons by Invoice line, including Sales Splits and other Salespeople, with a 0 percent, that need to be tagged to a particular invoice line and used in Commission calculations. This new Button will allow the Advanced Commission module to calculate commissions for that particular sales line. Each invoice line can be assigned different sales splits and salespeople. The Sales People will default on the invoice line based on the Customer Setup defaults, or if created from a Sales Order or generated from an Acumatica Contract or Project, default from the Sales Order Lines, Contract Lines, and Project Tasks lines respectively, but can be modified per line as needed.
For more information, see Processing Invoices.

Document Details Tab

On this tab, you can specify the line details for a new document or view the details of the document selected in the upper area of the form.

Table Toolbar

The table toolbar includes standard buttons and buttons specific to this table. For the list of standard buttons, see Table Toolbar. Upon installing the Advanced Commission Module, the button **Commission Split** is added. The table-specific buttons are listed below.

<table>
<tr><th>Button</th><th>Description</th></tr>
<tr><td>Commission Split</td><td>Opens the Commission Split dialog box, which shows the commission split percentage between Salespersons assigned to the specified Invoice Line. If a salesperson, such as a manager, should receive an override on top of the commission split, enter that salesperson (manager) with a 0% commission split. This will allow the line to also be tagged to the Manager for Commission Calculations but does not interfere with the 100% required commission splits. The following columns are included in the installation; however, additional custom fields may be added if needed for Commission calculations and conditions.
<table>
<tr><th>Columns</th><th>Description</th></tr>
<tr><td>Salesperson ID</td><td>The unique identifier of the salesperson assigned to the Invoice line.</td></tr>
<tr><td>Name</td><td>The salesperson’s name as it should appear on documents.</td></tr>
<tr><td>Role</td><td>The salesperson’s role is specified on the Salesperson form: Three options are available:
Salesperson
Manager
empty</td></tr>
<tr><td>Commission Split %</td><td>Commission percentage applied for specified salespeople. The total value for all rows must be equal to 100. If there are additional salespeople that will receive some type of commission on this line, enter that salesperson with a 0% split. This will allow that salesperson to be tagged to the line and used in the GI Commission Calculations.</td></tr>
<tr><td>Dollar Amount</td><td>The decimal field can be used to set a fixed value commission amount at the sales line item by Salesperson. The Dollar Amount can then be utilized to calculate a commission through a Commission Plan Generic Inquiry. Validation occurs to warn the user when the dollar amount of the split is greater than the invoice/sales order detail line amount.</td></tr>
<tr><td>Primary</td><td>Checkbox applied for the “primary” Salesperson for the specific invoice line. This is used in the Quota calculations and may also be used for GI commission queries and calculations.</td></tr>
</table></td></tr>
</table>

The table toolbar includes standard buttons and buttons specific to this table. For the list of standard buttons, see Table Toolbar. Upon installing the Advanced Commission Module, the button **Default Commission Split** is added. The table-specific buttons are listed below.

<table>
<tr><th>Button</th><th>Description</th></tr>
<tr><td>Default Commission Split</td><td>Opens the Default Commission Split dialog box, which shows the commission split percentage between Salespersons assigned to each new detail line added to the Invoice. If a salesperson, such as a manager, should receive an override on top of the commission split, enter that salesperson (manager) with a 0% commission split. This will allow the line to also be tagged to the Manager for Commission Calculations but does not interfere with the 100% required commission splits. The following columns are included in the installation; however, additional custom fields may be added if needed for Commission calculations and conditions.
<table>
<tr><th>Columns</th><th>Description</th></tr>
<tr><td>Salesperson ID</td><td>The unique identifier of the salesperson assigned to the Invoice line.</td></tr>
<tr><td>Name</td><td>The salesperson’s name as it should appear on documents.</td></tr>
<tr><td>Role</td><td>The salesperson’s role is specified on the Salesperson form: Three options are available:
• Salesperson
• Manager
• empty</td></tr>
<tr><td>Commission Split %</td><td>Commission percentage applied for specified salespeople. The total value for all rows must be equal to 100. If there are additional salespeople that will receive some type of commission on this line, enter that salesperson with a 0% split. This will allow that salesperson to be tagged to the line and used in GI Commission Calculations.</td></tr>
<tr><td>Dollar Amount</td><td>The decimal field can be used to set a fixed value commission amount at the sales line item by Salesperson. The Dollar Amount can then be utilized to calculate a commission through a Commission Plan Generic Inquiry. Validation occurs to warn the user when the dollar amount of the split is greater than the invoice detail line amount.</td></tr>
<tr><td>Primary</td><td>Checkbox applied for the “primary” Salesperson for the specific invoice line. This is used in the Quota calculations and may also be used for GI commission queries and calculations.</td></tr>
</table></td></tr>
</table>

Related Articles

Salespersons (AR2050PL)

Advanced Commissions SO3010PL Sales Orders Form Changes

Sales Orders

Form ID: (SO301000)

You can use this form to create new sales and transfer orders with the order types defined in the system, as well as to view and edit the details of existing and transfer orders. You can cancel an order, and you can create a shipment or prepare an invoice for an existing order. You may also assign multiple Salespersons by Sales Order line, including Sales Spits and other Salespeople, with a 0 percent, that need to be tagged to a particular sales order line and used in Commission calculations. This new Button will allow the Advanced Commission module to calculate commissions for that particular sales line. Each sales order line can be assigned different sales splits and salespeople. The Sales People will default on the sales order line based on the Customer Setup defaults but can be modified per line as needed.

Document Details Tab

This tab has a table that lists all the items included in the sales order. With the Advanced Commissions Module, a new button has been added to assign specific Salespersons to each Sales Order line. The Commission Split Customer Setup defaults will automatically populate for each line but can be modified per line as needed.

Table Toolbar

The table toolbar includes standard buttons and buttons specific to this table. For the list of standard buttons, see Table Toolbar. Upon installing the Advanced Commission Module, the button **Commission Split** is added. The table-specific buttons are listed below.

<table>
<tr><th>Button</th><th>Description</th></tr>
<tr><td>Commission Split</td><td>Opens the Commission Split dialog box, which shows the commission split percentage between Salespersons assigned to the specified Sales Order line. If a salesperson, such as a manager, should receive an override on top of the commission split, enter that salesperson with a 0% commission split. This will allow the line to also be tagged to the Manager for Commission Calculations but does not interfere with the 100% required commission splits. The following columns are included in the installation; however, additional custom fields may be added if needed for Commission calculations and conditions.
<table>
<tr><th>Columns</th><th>Description</th></tr>
<tr><td>Salesperson ID</td><td>The unique identifier of the salesperson assigned to the Sales Order line.</td></tr>
<tr><td>Name</td><td>The salesperson’s name as it should appear on documents.</td></tr>
<tr><td>Role</td><td>The salesperson’s role is specified on the Salesperson form: Three options are available:
• Salesperson
• Manager
• empty</td></tr>
<tr><td>Commission Split %</td><td>Commission percentage applied for specified salespeople. The total value for all rows must be equal to 100. If there are additional salespeople that will receive some type of commission on this line, enter that salesperson with a 0% split. This will allow that salesperson to be tagged to the line and used in GI Commission Calculations.</td></tr>
<tr><td>Dollar Amount</td><td>The decimal field can be used to set a fixed value commission amount at the sales line item by Salesperson. The Dollar Amount can then be utilized to calculate a commission through a Commission Plan Generic Inquiry. Validation occurs to warn the user when the dollar amount of the split is greater than the sales order detail line amount.</td></tr>
<tr><td>Primary</td><td>Checkbox applied for the “primary” Salesperson for specified Sales Order line. This is used in the Quota calculations and may also be used for GI commission queries and calculations.</td></tr>
</table>
</td></tr>
</table>

The table toolbar includes standard buttons and buttons specific to this table. For the list of standard buttons, see Table Toolbar. Upon installing the Advanced Commission Module, the button **Default Commission Split** is added. The table-specific buttons are listed below.

<table>
<tr><th>Button</th><th>Description</th></tr>
<tr><td>Default Commission Split</td><td>Opens the Default Commission Split dialog box, which shows the commission split percentage between Salespersons assigned to each new detail line added to the Sales Order. If a salesperson, such as a manager, should receive an override on top of the commission split, enter that salesperson (manager) with a 0% commission split. This will allow the line to also be tagged to the Manager for Commission Calculations but does not interfere with the 100% required commission splits. The following columns are included in the installation; however, additional custom fields may be added if needed for Commission calculations and conditions.
<table>
<tr><th>Columns</th><th>Description</th></tr>
<tr><td>Salesperson ID</td><td>The unique identifier of the salesperson assigned to the Sales Order line.</td></tr>
<tr><td>Name</td><td>The salesperson’s name as it should appear on documents.</td></tr>
<tr><td>Role</td><td>The salesperson’s role is specified on the Salesperson form: Three options are available:
• Salesperson
• Manager
• empty</td></tr>
<tr><td>Commission Split %</td><td>Commission percentage applied for specified salespeople. The total value for all rows must be equal to 100. If there are additional salespeople that will receive some type of commission on this line, enter that salesperson with a 0% split. This will allow that salesperson to be tagged to the line and used in GI Commission Calculations.</td></tr>
<tr><td>Dollar Amount</td><td>The decimal field can be used to set a fixed value commission amount at the sales line item by Salesperson. The Dollar Amount can then be utilized to calculate a commission through a Commission Plan Generic Inquiry. Validation occurs to warn the user when the dollar amount of the split is greater than the sales order detail line amount.</td></tr>
<tr><td>Primary</td><td>Checkbox applied for the “primary” Salesperson for the specific Sales Order line. This is used in the Quota calculations and may also be used for GI commission queries and calculations.</td></tr>
</table></td></tr>
</table>

Related Articles

Salespersons (AR2050PL)

Advanced Commissions PM3020PL Project Tasks Form Changes

Project Tasks

Form ID: (PM302000)

By using this form, you can add new tasks to projects, view and modify the settings of existing project tasks, and delete tasks from projects. With the Advanced Commissions module, you may also assign Salespersons for the specified Project Task, allowing the user to calculate commissions based on data for each Project Task. The information will default from the Sales Splits defined for that Customer but can be changed for each Project Task as needed.

Form Toolbar

The form toolbar includes only standard buttons. For the list of standard buttons, see Form Toolbar.

Summary Area

You use the elements in this area to add a new task or to select an existing task and view its details.

Element	**Description**
Project ID	The project to which the task is assigned.
Task ID	The unique identifier of the task. The structure of this identifier is defined by the *PROTASK* segmented key, whose configuration is defined on the Segmented Keys (CS202000) form.
Commissionable	With the Advanced Commissions Module, a checkbox is added to the Project and Project Task Screens to designate whether the Project Task is a Commissionable Task. Without the checkbox selected, the Commissions Module will ignore invoices related to these Project Tasks. Upon selecting this checkbox, a new Salespersons tab appears (see Salespersons tab).

Salespersons Tab

On this tab, you can assign Salespersons to the Task and apply their **Commission Split** percentage that will be used in commission calculations.

The table toolbar includes only standard buttons. For the list of standard buttons, see Table Toolbar.

Table Columns

<table>
<tr><th>Columns</th><th>Description</th></tr>
<tr><td>Commission Split</td><td>Opens the Commission Split dialog box, which shows the commission split percentage between Salespersons assigned to the specified Project Task. If a salesperson, such as a manager, should receive an override on top of the commission split, enter that salesperson (manager) with a 0% commission split. This will allow the transactions related to the Project Task to be tagged to the Manager for Commission Calculations but does not interfere with the 100% required commission splits. The following columns are included in the installation; however, additional custom fields may be added if needed for Commission calculations and conditions.
<table>
<tr><th>Columns</th><th>Description</th></tr>
<tr><td>Salesperson ID</td><td>The unique identifier of the salesperson assigned to the Contract Item.</td></tr>
<tr><td>Name</td><td>The salesperson’s name as it should appear on documents.</td></tr>
<tr><td>Role</td><td>The salesperson’s role is specified on the Salesperson form: Three options are available:
Salesperson
Manager
empty</td></tr>
<tr><td>Commission Split %</td><td>Commission percentage applied for specified salespeople. The total value for all rows must be equal to 100. If there are additional salespeople that will receive some type of commission on this line, enter that salesperson with a 0% split. This will allow that salesperson to be tagged to the transactions related to the Project Task and used in GI Commission calculations and conditions.</td></tr>
<tr><td>Dollar Amount</td><td>The decimal field can be used to set a fixed value commission amount at the sales line item by Salesperson. The Dollar Amount can then be utilized to calculate a commission through a Commission Plan Generic Inquiry. Validation occurs to warn the user when the dollar amount of the split is greater than the invoice/sales order detail line amount.</td></tr>
<tr><td>Primary</td><td>Checkbox applied for the “primary” Salesperson for the specific Contract Item. This is used in the Quota calculations and may also be used for GI commission queries and calculations.</td></tr>
</table></td></tr>
</table>

The table toolbar includes standard buttons and buttons specific to this table. For the list of standard buttons, see Table Toolbar. Upon installing the Advanced Commission Module, the button **Default Commission Split** is added. The table-specific buttons are listed below.

<table>
<tr><th>Button</th><th>Description</th></tr>
<tr><td>Default Commission Split</td><td>Opens the Default Commission Split dialog box, which shows the commission split percentage between Salespersons assigned to each new detail line added to the Project Task. If a salesperson, such as a manager, should receive an override on top of the commission split, enter that salesperson (manager) with a 0% commission split. This will allow the line to also be tagged to the Manager for Commission Calculations but does not interfere with the 100% required commission splits. The following columns are included in the installation; however, additional custom fields may be added if needed for Commission calculations and conditions.
<table>
<tr><th>Columns</th><th>Description</th></tr>
<tr><td>Salesperson ID</td><td>The unique identifier of the salesperson assigned to the Project Task line.</td></tr>
<tr><td>Name</td><td>The salesperson’s name as it should appear on documents.</td></tr>
<tr><td>Role</td><td>The salesperson’s role is specified on the Salesperson form: Three options are available:
Salesperson
Manager
empty</td></tr>
<tr><td>Commission Split %</td><td>Commission percentage applied for specified salespeople. The total value for all rows must be equal to 100. If there are additional salespeople that will receive some type of commission on this line, enter that salesperson with a 0% split. This will allow that salesperson to be tagged to the line and used in GI Commission Calculations.</td></tr>
<tr><td>Dollar Amount</td><td>The decimal field can be used to set a fixed value commission amount at the Project Task line item by Salesperson. The Dollar Amount can then be utilized to calculate a commission through a Commission Plan Generic Inquiry. Validation occurs to warn the user when the dollar amount of the split is greater than the sales order detail line amount.</td></tr>
<tr><td>Primary</td><td>Checkbox applied for the “primary” Salesperson for the specific Project Task line. This is used in the Quota calculations and may also be used for GI commission queries and calculations.</td></tr>
</table></td></tr>
</table>

Related Articles

Salespersons (AR2050PL)

Advanced Commissions CT3010PL Customer Contracts Form Changes

Customer Contracts

Form ID: (CT301000)

By using this form, you can create and maintain contracts for customer service. When you're creating a new contract, you can select the contract template you want to base it on. With the Advanced Commissions module, you may also assign Salespersons for the specified Contract Item, allowing the user to calculate commissions based on data for each Contract Item. The information will default from the Sales Splits defined for that Customer but can be changed for each Contract Item as needed. For more details, see Contract Setup and Activation.

Details Tab

This tab lists the contract items provided under the contract. The list of contract items is loaded automatically from the template you have selected. You can modify the list of items if the **Enable Template Item Override** checkbox is selected for the template on the Contract Templates (CT202000) form.

Table Toolbar

The table toolbar includes standard buttons and buttons specific to this table. For the list of standard buttons, see Table Toolbar. Upon installing the Advanced Commission Module, the button **Commission Split** is added to allow splits by Contract Item.

<table>
<tr><th>Button</th><th>Description</th></tr>
<tr><td>Commission Split</td><td>Opens the Commission Split dialog box, which shows the commission split percentage between Salespersons assigned to the specified Contract Item. If a salesperson, such as a manager, should receive an override on top of the commission split, enter that salesperson (manager) with a 0% commission split. This will allow the Contract Item line to also be tagged to the Manager for Commission Calculations but does not interfere with the 100% required commission splits. The following columns are included in the installation; however, additional custom fields may be added if needed for Commission calculations and conditions.
<table>
<tr><td>Columns</td><td>Description</td></tr>
<tr><td>Salesperson ID</td><td>The unique identifier of the salesperson assigned to the Contract Item.</td></tr>
<tr><td>Name</td><td>The salesperson’s name as it should appear on documents.</td></tr>
<tr><td>Role</td><td>The salesperson’s role is specified on the Salesperson form: Three options are available:
• Salesperson
• Manager
• empty</td></tr>
<tr><td>Commission Split %</td><td>Commission percentage applied for specified salespeople. The total value for all rows must be equal to 100. If there are additional salespeople that will receive some type of commission on this line, enter that salesperson with a 0% split. This will allow that salesperson to be tagged to the line and used in GI Commission Calculations.</td></tr>
<tr><td>Dollar Amount</td><td>The decimal field can be used to set a fixed value commission amount at the sales line item by Salesperson. The Dollar Amount can then be utilized to calculate a commission through a Commission Plan Generic Inquiry. Validation occurs to warn the user when the dollar amount of the split is greater than the Contract Item detail line amount.</td></tr>
<tr><td>Primary</td><td>Checkbox applied for the “primary” Salesperson for the specific Contract Item. This is used in the Quota calculations and may also be used for GI commission queries and calculations.</td></tr>
</table></td></tr>
</table>

The table toolbar includes standard buttons and buttons specific to this table. For the list of standard buttons, see Table Toolbar. Upon installing the Advanced Commission Module, the button **Default Commission Split** is added. The table-specific buttons are listed below.

<table>
<tr><th>Button</th><th>Description</th></tr>
<tr><td>Default Commission Split</td><td>Opens the Default Commission Split dialog box, which shows the commission split percentage between Salespersons assigned to each new detail line added to the Contract Item. If a salesperson, such as a manager, should receive an override on top of the commission split, enter that salesperson (manager) with a 0% commission split. This will allow the line to also be tagged to the Manager for Commission Calculations but does not interfere with the 100% required commission splits. The following columns are included in the installation; however, additional custom fields may be added if needed for Commission calculations and conditions.
<table>
<tr><th>Columns</th><th>Description</th></tr>
<tr><td>Salesperson ID</td><td>The unique identifier of the salesperson assigned to the Contract Item line.</td></tr>
<tr><td>Name</td><td>The salesperson’s name as it should appear on documents.</td></tr>
<tr><td>Role</td><td>The salesperson’s role is specified on the Salesperson form: Three options are available:
• Salesperson
• Manager
• empty</td></tr>
<tr><td>Commission Split %</td><td>Commission percentage applied for specified salespeople. The total value for all rows must be equal to 100. If there are additional salespeople that will receive some type of commission on this line, enter that salesperson with a 0% split. This will allow that salesperson to be tagged to the line and used in GI Commission Calculations.</td></tr>
<tr><td>Dollar Amount</td><td>The decimal field can be used to set a fixed value commission amount at the Contract Item line item by Salesperson. The Dollar Amount can then be utilized to calculate a commission through a Commission Plan Generic Inquiry. Validation occurs to warn the user when the dollar amount of the split is greater than the Contract Item detail line amount.</td></tr>
<tr><td>Primary</td><td>Checkbox applied for the “primary” Salesperson for the specific Contract Item line. This is used in the Quota calculations and may also be used for GI commission queries and calculations.</td></tr>
</table></td></tr>
</table>

Related Articles

Salespersons (AR2050PL)

Advanced Commissions AR2050PL Salespersons Form Changes

Salespersons

Form ID: (AR205000)

You can use this form to create new salesperson records and modify existing salesperson records. You also may add Commission Plans to each Salesperson for the commissions to be calculated for that Salesperson based on rules defined in the related Commission Plans. For more information, see Commission Configuration and Calculation.

Form Toolbar

The form toolbar includes only standard buttons. For the list of standard buttons, see Form Toolbar.

Summary Area

In this area, you can create a new salesperson account or select an existing salesperson account for viewing or editing its settings.

Element	**Description**
Salesperson ID	The unique identifier of the salesperson. Requirements for the ID are set by the *SALESPER* segmented key. For more information, see Segmented Identifiers.
Is Active	A checkbox that indicates (if selected) that the salesperson account is active.
Name	The salesperson's name as it should appear on documents.
Default Commission %	Should not be shown when using the Advanced Commissions Module. Once the Advanced Commissions Module is installed, the tab will be removed and no longer display on the Salesperson Form
Sales Sub.	The subaccount associated with the salesperson. This is for informational reporting purposes only and does not have any effect on the Acumatica Financial System
Role	The salesperson's role. Three options are available: • Salesperson • Manager • *empty*

Customers Tab - Removed with the Advanced Commissions Module

This tab should not be displayed when using the Advanced Commissions Module. Once the Advanced Commissions Module is installed, the tab will be removed and no longer display on the Salesperson Form

Table Toolbar

The table toolbar includes standard buttons and buttons specific to this table. For the list of standard buttons, see Table Toolbar. The table-specific buttons are listed below.

Button	Description
View Details	Removed when using the Advanced Commission Module

Table Columns

Removed when using the Advanced Commission Module.

Commission Plans Tab

This tab contains a list of the plans associated with the specific salesperson. A Salesperson will receive commissions that are calculated based on Plans added on this tab. The tab is added upon installing the Advanced Commission Module.

The table toolbar includes only standard buttons. For the list of standard buttons, see Table Toolbar.

Column	Description
ID	The reference number of the Plan document in the system.
Plan Name	Commission Plan's name as it should appear on documents.
Start Date	The start date applied to the Plan on the CWAC4010 Commission Plan form
End Date	End date applied to the Plan on the CWAC4010 Commission Plan form
Plan Type	Two options are available: • Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission • Quota: The plan is based on meeting a particular sales level or target and accumulates for each sale until the predefined revenue target or quota goal is reached.
Frequency	Three options are available: • Monthly • Quarterly • Yearly
Pay Out Type	Two options are available: • Immediate • On Paid Invoice

Related Articles

Commission Configuration and Calculation
Segmented Identifiers
Accounts Receivable Preferences (AR101000)
Commission Details (AR403000)

Advanced Commissions AR3030PL Customer Master Form Changes

Customer Master

Form ID: (AR303000)

With this form, you can create customer accounts and view the details of existing accounts. With the Advanced Commissions Module, you may also set up salesperson commission split defaults for the specified Customer. Based on the defaults setup on the Customer Master, the Sales Order Lines, Invoice Lines, Project Tasks, and Contract Items will default to the Customer Master default; however, they can be changed at the document line level, project task, and contract item as needed. For more information, see Managing Customers.

Salespersons Tab

This tab has been added to define the default Customer Sales Person splits.

<table>
<tr><th>Tab</th><th>Description</th></tr>
<tr><td>Salespersons</td><td>Opens the Commission Split dialog box, which shows the commission split percentage between Salespersons assigned to the specified Customer. If a salesperson, such as a manager, should receive an override on top of the commission split, enter that salesperson (manager) with a 0% commission split. This will allow the document lines to also be tagged to the Manager for Commission Calculations but does not interfere with the 100% required commission splits. The following columns are included in the installation; however, additional custom fields may be added if needed for Commission calculations and conditions.
<table>
<tr><th>Columns</th><th>Description</th></tr>
<tr><td>Salesperson ID</td><td>The unique identifier of the salesperson assigned to the Customer Master.</td></tr>
<tr><td>Name</td><td>The salesperson’s name as it should appear on documents.</td></tr>
<tr><td>Role</td><td>The salesperson’s role specified on the Salesperson form: Three options are available:
Salesperson
Manager
empty</td></tr>
<tr><td>Commission Split %</td><td>Commission percentage applied for specified salespeople. The total value for all rows must be equal to 100. If there are additional salespeople that will receive some type of commission on this line, enter that salesperson with a 0% split. This will allow that salesperson to be tagged to the document lines and used in GI Commission Calculations and Conditions.</td></tr>
<tr><td>Primary</td><td>Checkbox applied for the “primary” Salesperson for the specified Customer. This is used in the Quota calculations and may also be used for GI commission queries and calculations.</td></tr>
</table></td></tr>
</table>

Related Articles Salespersons (AR2050PL)