

# Advanced Commissions for Acumatica

# **USER GUIDE**

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

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## 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 softwareStep 2: Import and Publish Customization ProjectStep 3: Applying Preferences

## Step 1: Install Acumatica software

1. Follow the Acumatica installation guide.

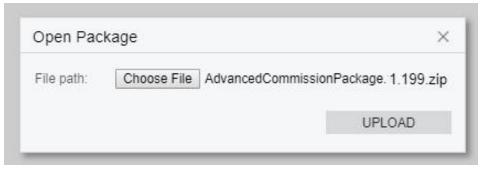
## Step 2: Import and Publish Customization Project

#### **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.

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Cus	tomiz	ation	Proje	ects	<u>ل</u>					
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- 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.

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Cu	stomiz	ation	Proje	ects 1	<u>^</u>							
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8			Publis	hed	* Project N	ame	т		Level	Screen Names		Desc
>	$\checkmark$				Advanced	CommissionPackage.1	.199		1	AR205000,AR30	01000,AR303	

- 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.

	Published	*Project Name	т	Level	Screen Names		D			
		AdvancedCommissionPackage.1.199	AdvancedCommissionPackage.1.199							
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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.



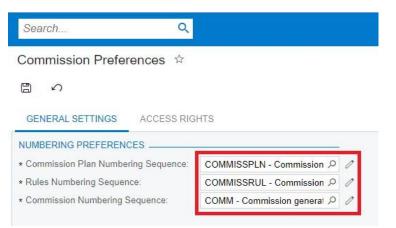
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## **Step 3: Applying Preferences**

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:

Customization Projects 🕸

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		Published	*Project Name	Level Screen Names	Description
>			ComissionSummary		
	$\checkmark$	$\checkmark$	CWADVBGTS[20.101.0032][1.3	GL202500,GL302010	
			CWADVBGTSWIKI2		
			CWCOLLMGTWIKI[19.110.0013		CW_COLMGT_WikiHelp[18.208
	$\checkmark$	$\checkmark$	CWLOCKBOX[19.207.0026][19		CWLOCKBOX[19.207.0026][19
			FSUpdateDates2020R1		SM Demo Data
			SalesDemoDashboards2020R1		
			Smartsheet	PM301000	
	$\checkmark$	$\checkmark$	CWLICENSING[19.108.0017][1	1	CW_LICENSING[19.108.0017][
	$\checkmark$	$\checkmark$	CW360SALES[19.207.0026][19	2	CW360SALES[19.207.0026][19
	$\checkmark$	$\checkmark$	CWINBXMGT[19.110.0013][19R	2 AP101000,SM204002	CWINBXMGT[19.110.0013][19R
	$\checkmark$	$\checkmark$	CWIVSUBST[19.207.0026][19R	2 IN202500,SO301000	CWIVSUBST[19.207.0026][19R
			CWLOCKBOXWIKIHELP	2	
			<b>CAIntCommCustomizations</b>	3 AR205000,CWAC301	
			<u>CWACSalesPersonType</u>	3 AR205000,CWAC3010	
			CWCOLLMGTDEMODATA[2020	3 CWCM1000	CWCOLLMGT_DEMO_DATA[20
	$\checkmark$	$\checkmark$	CWADVCOMM[20.101.0032][20	14 AP301000,AR205000	CWADVCOMM[20.101.0032][20
	$\checkmark$		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 Minimal License Tier

# **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 Commission Plan Salespersons and Split Commission

Commission Processing Calculate Commissions (Calculated status) Approve Commissions (Approve or Accrued status) Pay Commissions (Ready for Payment and Paid statuses) Commission Adjustment

# **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.

Customer Master									
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* Status:	Active	-	Prepayment Bal	ance:	0.00				
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B D Salesperson	*Location	Name	Role		Commission Split %	Primai			
> 0 D <u>SP0003</u>	CHICAGO	Steve Church			100.000000				
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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**

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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 <u>calculated</u> 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.



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	9900	Commission ID	Commission Type	Salesperson ID	Name	Plan ID	Commissionable Amount	Threshold	Invoice Ref. Nbr.	Commission Split %	Commission Amount	Commission Status	Pay Out Type	Plan Type	Frequency	Reason Code	Reason Code Description	Commission Date	Branch	Customer	Date	Doc Description	Type
		CO-000320	Commissio	SP0006	Pam Braw						-10.00	Approved				ARNOPAY	AR Not Pai	6/17/2020					
	8 D T	CO-000855	Commission	SP0001	Jason Men	CP-000001	127.84		AR008410	100.00	127.84	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		7/21/2020	Portable T	INV
		CO-000867	Commission	SP0001	Jason Men	CP-000001	88.14		AR008416	100.00	88.14	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		9/1/2020		INV
			Commission	SP0001	Jason Men	CP-000001	188.14		AR005418	100.00	188.14	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		9/1/2020		INV
	8 D C	CO-000869	Commission	SP0003	Steve Chu	CP-000001	63.92		AR008409	100.00	63.92	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		7/21/2020		INV
			Commission	SP0002	Michal Buj.	CP-000008	0.10		AR008393	100.00	0.10	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		6/16/2020		INV
		CO-000911	Commission	SP0002	Michal Buj	CP-000008	0.10		AR008394	100.00	0.10	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		6/16/2020		INV
		CO-000912	Commission	SP0002	Michal Buj	CP-000008	0.10		AR008400	100.00	0.10	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		6/17/2020		INV
		CO-000913	Commission	SP0002	Michal Buj	CP-000008	0.10		AR008397	100.00	0.10	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio.	10/1/2020	PRODWH		6/16/2020		INV
		CO-000914	Commission	SP0002	Michal Buj	CP-000008	0.10		AR008410	100.00	0.10	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		7/21/2020	Portable T	INV
		CO-000915	Commission	SP0002	Michal Buj	CP-000008	1.12		AR008411	20.00	0.22	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio.	10/1/2020	PRODWH		7/28/2020	Food and r	IN
		CO-000916	Commission	SP0002	Michal Buj.	CP-000008	1.51		AR008400	100.00	1.51	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		6/17/2020		IN
		CO-000917	Commission	SP0002	Michal Buj	CP-000008	1.50		AR008400	100.00	1.50	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		6/17/2020		INV
		CO-000918	Commission	SP0002	Michal Buj.	CP-000008	11.20		AR008413	100.00	11.20	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		7/31/2020	Project Bill	INV
		CO-000919	Commission	SP0002	Michal Buj	CP-000008	11.20		AR008413	100.00	11.20	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		7/31/2020	Project B#I	INV
		CO-000920	Commission	SP0002	Michal Buj.	CP-000008	11.20		AR008413	100.00	11.20	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		7/31/2020	Project Bill	INV
		CO-000921	Commission	SP0002	Michai Buj	CP-000068	1.00		AR008413	100.00	1.00	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	SERVEAST		7/31/2020	Project Bill	INV
		CO-000922	Commission	SP0002	Michal Buj.	CP-000008	1.00		AR008413	100.00	1.00	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	SERVEAST		7/31/2020	Project Bill	INV
		CO-000923	Commission	SP0002	Michal Buj	CP-000008	1.10		AR008417	100.00	1.10	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		9/1/2020		INV
		CO-000924	Commission	SP0002	Michal Buj.	CP-000068	14.25		AR008420	20.00	2.85	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		10/1/2020	test order	INV
		CO-000925	Commission	SP0002	Michal Buj	CP-000008	50.00		AR008420	20.00	10.00	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		10/1/2020	test order	INV
1		CO-000926	Commission	SP0002	Michal Buj.	CP-000008			AR008417	0.00	1.10	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		9/1/2020		INV
		CO-000927	Commission	SP0002	Michai Buj	CP-000008	3.56		AR008420	80.00	2.85	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	10/1/2020	PRODWH		10/1/2020	test order	INV
		CO-001084	Commission	SP0001	Jason Men	CP-000003	3,000.00		AR008414	90.00	2,700.00	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	9/30/2020	PRODWH	ABCSTUD	8/10/2020	Adv Comm	INV
		CO-001085	Commission	SP0001	Jason Men.	CP-000003	20.00		AR008390	100.00	20.00	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	9/30/2020	PRODWH	ABARTEN	6/9/2020	Adv Comm	INV
		CO-001085	Commission	SP0001	Jason Men	CP-000003	20.00		AR008391	100.00	20.00	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio.	9/30/2020	PRODWH	ABCSTUD	6/9/2020	Adv Comm	INV
		CO-001087	Commission	SP0001	Jason Men	CP-000003	100.00		AR008407	20.00	20.00	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio.	9/30/2020	PRODWH	AACUSTO	7/6/2020		INV
		CO-001088	Commission	SP0001	Jason Men	CP-000003	100.00		AR008408	20.00	20.00	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	9/30/2020	PRODWH	AACUSTO	7/6/2020		INV
		CO-001089	Commission	SP0001	Jason Men.	CP-000003	200.00		AR008412	50.00	100.00	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio.	9/30/2020	PRODWH	ALPHABE	7/28/2020	2 Acer lapt	INV
		CO-001090	Commission	SP0001	Jason Men	CP-000003	2,000.00		AR008414	90.00	1,800.00	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio	9/30/2020	PRODWH	ABCSTUD	8/10/2020	Adv Comm	. INV
		CO-001091	Commission	SP0001	Jason Men	CP-000003	200.00		AR008420	80.00	160.00	Accrued	Immediate	Flat Rate	Monthly	COMM	Commissio.	9/30/2020	PRODWH	AACUSTO	10/1/2020	test order	INV

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	<ul> <li>A Commission Ledger record will be created and tagged with a <i>Calculated</i> 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).</li> <li>Once the commissions have been <i>Calculated</i>, they will appear on the Commissions Form (CWAC4020) with a new status of <i>Calculated</i>.</li> <li>As long as a commission record has a <i>Calculated</i> status, the Calculate Commissions Process will remove the old Commissions on the Commission Form (CWAC4020) that still have a <i>Calculated</i> Status and create brand new Commission records with a <i>Calculated</i> Status. All other Commission records on the Commission Form will not change by the Calculate Commissions process.</li> </ul>
Approved	<ul> <li>The Commissions will be moved to the <i>Approved</i> status with the following Actions:         <ul> <li>The user manually changes the Commission Status to <i>Approved</i> on the Commissions Form (CWAC4020)</li> <li>The user manually runs the <i>Approve Commissions</i> process Form CWAC5020.</li> <li>A user sets up an Acumatica Automation Schedule for the Approve Commissions Form CWAC5020.</li> <li>User Security Rules apply.</li> </ul> </li> </ul>
	<ul> <li>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.</li> <li>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.</li> <li>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.</li> <li>If the Payout Type is Immediate, the commission status will be set to Accrued. The approval status is assumed and skipped.</li> <li>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)</li> </ul>
Accrued	<ul> <li>The Commissions will be moved to the <i>Accrued</i> status with the following Actions:         <ul> <li>The user manually changes the Commission Status to <i>Accrued</i> on the Commissions Form (CWAC4020)</li> <li>The user manually runs the Approve Commissions process Form CWAC5020.</li> <li>A user sets up an Acumatica Automation Schedule for the Approve Commissions Form CWAC5020.</li> <li>User Security Rules apply.</li> </ul> </li> </ul>



	<ul> <li>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 1 step further.</li> <li>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.</li> <li>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.</li> <li>If the Payout Type is Immediate, the commission status will be set to Accrued. The approval status is assumed and skipped.</li> <li>Based on the Commission Plan Frequency Rules, the commission will remain in the Accrued Status until the Frequency rules are met.</li> <li>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)</li> </ul>
Ready for payment	<ul> <li>The Commissions will be moved to the <i>Ready for Payment</i> status with the following Actions:         <ul> <li>The user manually changes the Commission Status to <i>Ready for Payment</i> on the Commissions Form (CWAC4020)</li> <li>The user manually runs the Process Commissions process Form CWAC5040.</li> <li>A user sets up an Acumatica Automation Schedule for the Process Commissions process Form CWAC5040.</li> <li>User Security Rules apply.</li> </ul> </li> <li>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.</li> <li>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)</li> </ul>
Paid	<ul> <li>The Commissions will be moved to the <i>Paid</i> status with the following Actions:         <ul> <li>The user manually changes the Commission Status to <i>Paid</i> on the Commissions Form (CWAC4020)</li> <li>The user manually runs the Pay Commissions process Form CWAC5030.</li> <li>A user sets up an Acumatica Automation Schedule for the Process Commissions process Form CWAC5030.</li> <li>User Security Rules apply.</li> </ul> </li> <li>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)</li> <li>Paid is the final status in the commission processing</li> </ul>



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

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			s Active					Sales	Pers	on Type	: Ve	ndor	•									
* Name:		Α.	A. RAYNER	R & SON	s																	
Role:		Sa	lesperson																			
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			1003683		RICI	K CAB	AY						1020 J	AMES	PASS							
			1003684		COF		FUN	ERAL	HON	١Ε			JUSTIN		DERO II	1	1822 S A	SHLAND				
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			1003686		DAM	MES F	UNER	AL H	м				3200 B	ACK	ROAD					-		
			1003687		JON	DAM	ES						TOON	FUNER	RAL		4920 MA	IN STREE	т	- (		
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			1003689		MAR	RK DE	NMAN	4					19323	W GRA	ASS LA	KE RD				- 6		
			1003690		DOM	INELL	AN FA	AMILY	FUNE	ERAL S	ERV		10045	N. SKO	OKIE BL	VD.				-		

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



#### Advanced Commissions User Guide | Overview of the Business Processes and the Key Use Cases of the Solution P a g e | 21

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CUSTOMIZATION TOOLS

Commissions 🕸

	Q	¥	ר	ACTIONS -	→  X								
	Drag	colu	ımn i		n Adjustment						Y B		
	0			View Adjus	tment	Salesperson ID	Salesperson Name	Plan ID	Commissionable Amount	Threshold	Invoice Ref. Nbr.	Commission Split %	Commission Amount
	0		$\checkmark$	CO-000047	Commission	SP0001	Jason Mendenhall	CP-000003	3,000.00		AR008392	90.00	2,700.00
	0		$\checkmark$	CO-000053	Commission	SP0001	Jason Mendenhall	CP-000003	1,500.00		AR008392	90.00	1,350.00
>	0			CO-000056	Commission	<u>SP0001</u>	Jason Mendenhall	<u>CP-000003</u>	1,000.00		AR008392	90.00	900.00
	0			CO-000308	Commission	<u>SP0001</u>	Jason Mendenhall	<u>CP-000004</u>	11.74		AR008393	100.00	11.74
	0			CO-000309	Commission	<u>SP0001</u>	Jason Mendenhall	<u>CP-000004</u>	11.74		AR008394	100.00	11.74
	0			CO-000310	Commission	<u>SP0001</u>	Jason Mendenhall	<u>CP-000004</u>	10.00		AR008394	100.00	10.00
	0	D		CO-000311	Commission	<u>SP0001</u>	Jason Mendenhall	<u>CP-000004</u>	20.00		AR008397	100.00	20.00
	0			CO-000312	Commission	<u>SP0001</u>	Jason Mendenhall	<u>CP-000004</u>	10.00		AR008395	60.00	6.00
	0			CO-000313	Commission	<u>SP0001</u>	Jason Mendenhall	<u>CP-000004</u>	20.00		AR008396	60.00	12.00
	0			CO-000314	Commission	<u>SP0002</u>	Michal Bujacek	<u>CP-000004</u>	10.00		AR008395	40.00	4.00
	0			CO-000315	Commission	<u>SP0002</u>	Michal Bujacek	<u>CP-000004</u>	20.00		AR008396	40.00	8.00
	0			CO-000316	Commission	<u>SP0006</u>	Pam Brawner	<u>CP-000005</u>	11.74		AR008398	100.00	11.74
	0			CO-000317	Commission	<u>SP0006</u>	Pam Brawner	<u>CP-000005</u>	10.00		AR008398	100.00	10.00
	0			CO-000318	Commission	<u>SP0001</u>	Jason Mendenhall	<u>CP-000004</u>	20.00		AR008399	99.00	19.80
	0			CO-000319	Commission	<u>SP0002</u>	Michal Bujacek	<u>CP-000004</u>	20.00		AR008399	1.00	0.20
	0			CO-000320	Commission Adjustment	<u>SP0006</u>	Pam Brawner						-10.00
	0			CO-000323	Commission	<u>SP0001</u>	Jason Mendenhall	<u>CP-000004</u>	20.00		AR008400	100.00	20.00

#### Bills and Adjustments 🕸

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CUSTOMIZATION .

Type:	All	Status: All	Date: All 🔹							7 🛱		
0 0	ום	lype	Reference Nbr.	Status	Date	Post Period	Vendor	Vendor Name	Description	Vendor Ref.	Amount	Curren
0		Bill	AP000340	On Hold	4/29/2020	04-2020	1003768	ALLSTAFF	Commission Payment Import	04/29/2020 10:30:17.0671	2.64	USD
0		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
0		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
0		Bill	AP000320	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,		0320-143940	453.76	USD
0		Bill	AP000319	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,		0320-143856	1,021.60	USD
0	D	Bill	AP000318	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,		0320-144353	623.61	USD
0		Bill	AP000317	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,		0320-143806	1,039.35	USD
0		Bill	AP000316	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,		0320-143800	1,133.14	USD
0	D	Bill	AP000315	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,		0220-143541	59.99	USD
0	D	Bill	AP000314	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,		0220-143540	178.29	USD
0	D	Bill	AP000313	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,		0220-143411	164.78	USD
0		Bill	AP000312	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,		0220-143326	1,999.27	USD
0		Bill	AP000311	Open	4/3/2020	04-2020	1003799	CENTRAL GRANITE COMPANY,		0220-143325	1,483.82	USD
0	D	Bill	AP000310	Open	4/22/2020	04-2020	1003555	WESTLAWN CEMETERY		LEBOVITZ	850.00	USD
0		Bill	AP000309	Open	4/22/2020	04-2020	1003839	GRACELAND - CHICAGO		LIFSCHITZ	450.00	USD
0		Bill	AP000308	Open	4/22/2020	04-2020	1003766	ALL SAINTS CEMETERY-DESPL		DIVENERE	310.00	USD
0		Bill	AP000307	Open	4/22/2020	04-2020	1003883	MT CARMEL CEMETERY-HILLS		CALABRESE	155.00	USD
0	D	Bill	AP000306	Open	4/22/2020	04-2020	1003761	ACACIA PARK CEMETERY		SANTIAGO	695.00	USD
0	D	Bill	AP000305	Open	4/22/2020	04-2020	1003766	ALL SAINTS CEMETERY-DESPL		DIZONNO	310.00	USD
0	D	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.

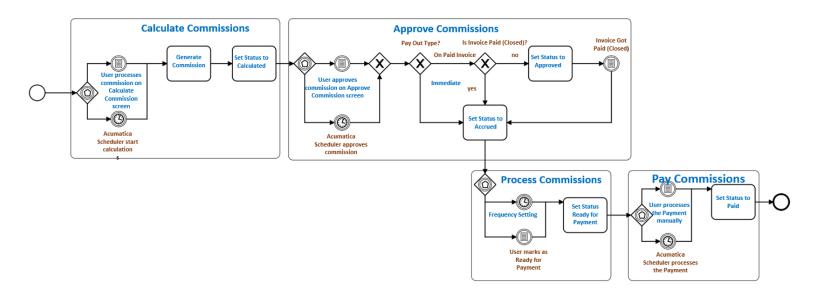
Advanced Commissions will automatically create the associated AP Bills for the commission line items that were selected in the Commissions window. The Bills and Adjustments window will show the AP Bills that have been



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.

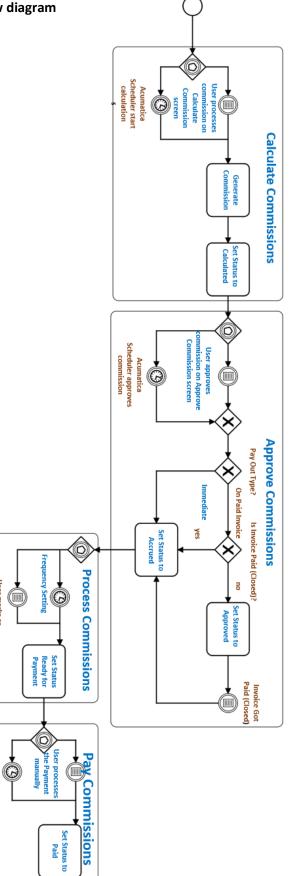






User marks as Ready for Payment

Acumatica Scheduler processes the Payment





#### **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.

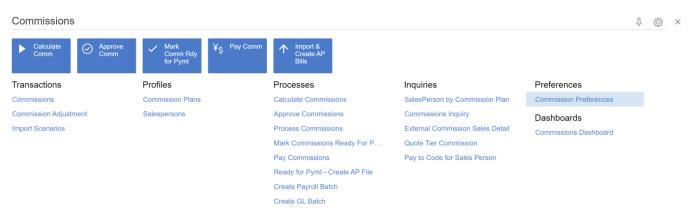


#### Commission Preferences \$\phi\$

GENERAL SETTINGS ACCESS RIGHTS

NUMBERING PREFERENC	CES		
* Commission Plan Number	ring Sequence:	COMMISSPLN - Commission $ \mathcal{P} $	0
* Rules Numbering Sequen	ce:	COMMISSRUL - Commission $\mathcal{P}$	Ø
* Commission Numbering S	Sequence:	COMM - Commission general $\mathcal{P}$	Ø
Activate AP Bill Import	Cash Acct Overric	le by Branch	
✓ Enable change/delete c	on sales order line	es with calculated commission	
Require default invoice	splits to insert ne	w detail lines	
Require default Sales C	Order splits to inse	ert new detail lines	
COMMISSIONS CAN BE G	ENERATED FRO	M	
✓ Sales Order			
Contracts			
✓ Projects/Tasks			
PAYROLL INTEGRATION -			
🗹 Enable Payroll Integrati	ion		
Default Payroll Type:	Regular	•	
Default Pay Group:	MONTHLY - Mo	nthly 🔎 🧷	
Default Code:	CM - Commissio	on 🔎 🖉	

• 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.



Cre	eate Pa	ayroll Batch	n													CUSTOMIZ	ATION TOO	OLS
Ç	\$	PROCESS	PROCESS A	LL 🕲 🕶	H X .	7												
	Payroll Re	equired Fields			Commi	ssion Date Filter			Additional Commissio	on Filters								
	Action:	́ Г	New Batch	•	From	1:			Plan ID:		Q	Pay Out Type:						
	Payroll	Type:	Regular	*	To:		¥		Salesperson ID:		Q							
	* Pay Gr	roup:	MONTHLY - Mon	thly Paygr 🔎 🖉	2				Frequency:		Ψ.							
	* Code:		CM - Commissio	n ,0 d	1													
	🛿 Pay Pe	eriod:		Q														
0			Commission	Commission	Salesperson	Salesperson	Employee	Employee	Plan ID	Commissionable	Threshold	Invoice Ref. Nbr.	Commission	Commission	Commission	Pay Out	Plan Type	
		ID	Date	Туре	ID	Name	linked to SP	Name		Amount			Split %	Amount	Status	Туре		
0		CO-000025	8/4/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	100.00		AR009873	100.00	100.00	Ready for	Immediate	Flat Rate	
0		CO-000026	8/4/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	330.00		AR009871	100.00	330.00	Ready for	Immediate	Flat Rate	
0		CO-000027	8/4/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	131.84		AR009872	100.00	131.84	Accrued	Immediate	Flat Rate	
0		CO-000028	8/19/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	100.00		AR009875	100.00	100.00	Ready for	Immediate	Flat Rate	
0		CO-000031	9/24/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	23.33		AR009877	100.00	23.33	Accrued	Immediate	Flat Rate	
0		CO-000032	9/24/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	100.00		AR009876	100.00	100.00	Accrued	Immediate	Flat Rate	
0		CO-000045	10/18/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	93.30		AR009879	60.00	55.98	Accrued	Immediate	Flat Rate	
0		CO-000046	10/18/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	41.88		AR009879	60.00	25.13	Ready for	Immediate	Flat Rate	
0		CO-000048	10/18/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	200.00		AR009878	100.00	200.00	Ready for	Immediate	Flat Rate	
0		CO-000050	10/18/2021	Commission	<u>SP0001</u>	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	82.50		AR009878	100.00	82.50	Ready for	Immediate	Flat Rate	
0		CO-000063	11/3/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	23.33		AR009883	100.00	23.33	Accrued	Immediate	Flat Rate	
0		CO-000064	11/3/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	100.00		AR009877	50.00	50.00	Accrued	Immediate	Flat Rate	
0		CO-000065	11/3/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	100.00		AR009881	100.00	100.00	Accrued	Immediate	Flat Rate	
0		CO-000093	12/6/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	61.74		AR009886	100.00	61.74	Ready for	Immediate	Flat Rate	
0		CO-000096	12/6/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	200.00		AR009887	100.00	200.00	Accrued	Immediate	Flat Rate	
0		CO-000100	12/22/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000002</u>		10,000.00			100.00	Accrued	Immediate	Quota	
0		CO-000101	12/22/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000002</u>		20,000.00			150.00	Accrued	Immediate	Quota	

- 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.

Payroll Required Fields			
Action:	New Batch	•	
* Payroll Type:	Regular	•	
* Pay Group:	MONTHLY - Monthly Paygr	ρ	0
* Code:	CM - Commission	ρ	0
⊗ Pay Period:		ρ	

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.

Commission Date Filter		Ad	ditional Commission	Filters		
From:	•		Plan ID:	Q	Pay Out Type:	•
То:	-		Salesperson ID:	Q		
			Frequency:	•		

Users can select one or more of the commissions available and Process them as part of the Payroll ٠ batch transfer process.



CUSTOMIZATION TOOLS -

	_			
Create	Pa	vroll	Batch	

Ċ)	\$ PROCESS	PROCESS ALL	0.	++	x	Y

	Payr	roll F	Required Fields			Comm	ission Date Filter		A	dditional Commissi	on Filters								
	A	Action	1:	New Batch	*	From	n:	÷		Plan ID:		Q	Pay Out Type:		•				
	* P	ayro	II Type:	Regular	*	To:		-		Salesperson ID:		Q							
	* P	Pay G	Broup:	MONTHLY - Mon	thly Paygr 🔎	/				Frequency:		*							
	• C	Code		CM - Commission	n p	1													
	• P	Pay F	Period:	10-2020	Q														
8 0	D		Commission	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	Fr
0			CO-000025	8/4/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	100.00		AR009873	100.00	100.00	Ready for	Immediate	Flat Rate	м
0			CO-000026	8/4/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000003</u>	330.00		AR009871	100.00	330.00	Ready for	Immediate	Flat Rate	м
0			CO-000027	8/4/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	131.84		AR009872	100.00	131.84	Accrued	Immediate	Flat Rate	М
0			CO-000028	8/19/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000003</u>	100.00		AR009875	100.00	100.00	Ready for	Immediate	Flat Rate	M
0			] CO-000031	9/24/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	23.32		AR009877	100.00	23.32	Accrued	Immediate	Flat Rate	М
0			CO-000032	9/24/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000003</u>	100.00		AR009876	100.00	100.00	Accrued	Immediate	Flat Rate	М
0			] CO-000045	10/18/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000003</u>	93.30		AR009879	60.00	55.98	Accrued	Immediate	Flat Rate	М
0			] CO-000046	10/18/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000003</u>	41.88		AR009879	60.00	25.12	Ready for	Immediate	Flat Rate	М
0			] CO-000048	10/18/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000003</u>	200.00		AR009878	100.00	200.00	Ready for	Immediate	Flat Rate	м
0			CO-000050	10/18/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000003</u>	82.50		AR009878	100.00	82.50	Ready for	Immediate	Flat Rate	М
0	D		CO-000063	11/3/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000003</u>	23.32		AR009883	100.00	23.32	Accrued	Immediate	Flat Rate	М
0	D		CO-000064	11/3/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000003</u>	100.00		AR009877	50.00	50.00	Accrued	Immediate	Flat Rate	м
0	D		CO-000065	11/3/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000003</u>	100.00		AR009881	100.00	100.00	Accrued	Immediate	Flat Rate	м
0	D		CO-000093	12/6/2021	Commission	SP0001	Jason Men	EP0000001	Michael An	<u>CP-000003</u>	61.74		AR009886	100.00	61.74	Ready for	Immediate	Flat Rate	М
0	D		CO-000096	12/6/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	<u>CP-000003</u>	200.00		AR009887	100.00	200.00	Accrued	Immediate	Flat Rate	М
0			CO-000100	12/22/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	CP-000002		10,000.00			100.00	Accrued	Immediate	Quota	N
0	D		CO-000101	12/22/2021	Commission	SP0001	Jason Men	EP00000001	Michael An	CP-000002		20.000.00			150.00	Accrued	Immediate	Quota	N

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

#### <u>Create Payroll Batch</u> ☆

#### Ů ∽ PROCESS PROCESS ALL Ů ▼ |↔| 🕱 🍸

Payroll Required Fiel	ds			Commission Date Filter		Additional Commission	Filters	
Action:	New Batch	*		From:	•	Plan ID:	Q	Pay Out Type:
* Payroll Type:	Regular	•		To:	•	Salesperson ID:	٩	
* Pay Group:	MONTHLY - Monthly Pay	gr ,0	0			Frequency:	•	
* Code:	CM - Commission	Q	0					
* Pay Period:	10-2020	Q						

- 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



CUSTOMIZATION TOOLS -

Create Payroll Batch 🌣

	Payro	ll Req	uired Fields					Commiss	sion Date Filter			Additional	Commissio	n Filters										
	Act	ion:		Add To Ex	isting	Batch *		From:		*		Plan ID:				J	ρ	Pay Out Type:		•				
	<ul> <li>Bat</li> </ul>	ch ID	9			Q.	P	To:		*		Salespe	son ID:			ز	ρ							
	* Coo	de:		CM - Con	Se	lect - Batch ID										×	•							
0	D		Commission		SE	elect 🖒	⊷									ρ		Invoice Ref. Nbr.	Commission	Commission	Commission	Pay Out	Plan Type	
			ID	Date	B B	Batch ID	† Sta	atus	Payroll Type	Pay Group		Description			Pay Period	P.			Split %	Amount	Status	Туре		
0			CO-000025	8/4/20	> (	000066	н	old	Regular	CSTRWEEKL	Y	Construction	Weekly P	avaroup	01-202	1 1		AR009873	100.00	100.00	Ready for	Immediate	Flat Rate	
0			CO-000026	8/4/20		000074		pen	Special	MONTHLY		Construction	Troonay 1	aygroup III	09-202			AR009871	100.00	330.00	Ready for	Immediate	Flat Rate	
0			CO-000027	8/4/20		000075		old	Special	MONTHLY					09-202	- 1		AR009872	100.00	131.84	Accrued	Immediate	Flat Rate	
0			CO-000028	8/19/2		000076	н		Regular	MONTHLY					12-202	- 1		AR009875	100.00	100.00	Ready for	Immediate	Flat Rate	
0			CO-000031	9/24/2														AR009877	100.00	23.33	Accrued	Immediate	Flat Rate	
0			CO-000032	9/24/2	4											•		AR009876	100.00	100.00	Accrued	Immediate	Flat Rate	
0	۵		CO-000045	10/18/										K K	>	ж		AR009879	60.00	55.98	Accrued	Immediate	Flat Rate	
0			CO-000046	10/18/			<u></u>	<u></u>	V400111101111	<u></u>			*****	11100				AR009879	60.00	25.13	Ready for	Immediate	Flat Rate	
0			CO-000048	10/18/	2021	Commission	SP0	001	Jason Men	EP0000001	Michael	An <u>CP-0</u>	00003	200.00				AR009878	100.00	200.00	Ready for	Immediate	Flat Rate	
0			CO-000050	10/18/	2021	Commission	SP0	001	Jason Men	EP0000001	Michael	An <u>CP-0</u>	00003	82.50				AR009878	100.00	82.50	Ready for	Immediate	Flat Rate	
0			CO-000063	11/3/2	021	Commission	SP0	001	Jason Men	EP0000001	Michael	An <u>CP-0</u>	00003	23.33				AR009883	100.00	23.33	Accrued	Immediate	Flat Rate	
0			CO-000064	11/3/2	021	Commission	SP0	001	Jason Men	EP0000001	Michael	An <u>CP-(</u>	00003	100.00				AR009877	50.00	50.00	Accrued	Immediate	Flat Rate	
0			CO-000065	11/3/2	021	Commission	SP0	001	Jason Men	EP0000001	Michael	An <u>CP-0</u>	00003	100.00				AR009881	100.00	100.00	Accrued	Immediate	Flat Rate	
0			CO-000093	12/6/2	021	Commission	SP0	001	Jason Men	EP0000001	Michael	An <u>CP-(</u>	00003	61.74				AR009886	100.00	61.74	Ready for	Immediate	Flat Rate	
0			CO-000096	12/6/2	021	Commission	SP0	001	Jason Men	EP0000001	Michael	An <u>CP-(</u>	00003	200.00				AR009887	100.00	200.00	Accrued	Immediate	Flat Rate	
0			CO-000100	12/22/	2021	Commission	SPO	001	Jason Men	EP0000001	Michael	An <u>CP-0</u>	00002			10,000.00				100.00	Accrued	Immediate	Quota	
0			CO-000101	12/22/	2021	Commission	SPO	001	Jason Men	EP0000001	Michael	An <u>CP-0</u>	00002			20,000.00				150.00	Accrued	Immediate	Quota	

- 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.



#### Commission Preferences $\Rightarrow$

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GL INTEGRATION \_\_\_\_\_

GENERAL SETTINGS ACCESS RIGHTS

NUMBERING PREFERENC	ES		
* Commission Plan Number	ing Sequence:	COMMISSPLN - Commission	n 🔎 🖉
* Rules Numbering Sequen	ce:	COMMISSRUL - Commission	n 🔎 🖉
* Commission Numbering S	equence:	COMM - Commission genera	at 🔎 🖉
Activate AP Bill Import	Cash Acct Overrid	le by Branch	
✓ Enable change/delete c	on sales order line	s with calculated commission	
Require default invoice	splits to insert ne	w detail lines	
Require default Sales C	Order splits to inse	ert new detail lines	
COMMISSIONS CAN BE G	ENERATED FRO	Μ	
✓ Sales Order			
Contracts			
✓ Projects/Tasks			
PAYROLL INTEGRATION _			
✓ Enable Payroll Integrati	on		
Default Payroll Type:	Regular	•	
Default Pay Group:	MONTHLY - Mo	nthly 🔎 🧷	
Default Code:	CM - Commissio	on 🔎 🖉	

- 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.

GL INTEGRATION		
Enable GL Integration		
* Default GL Account:	10100 - Petty Cash 🔎	0
* Subaccount:	000-SNM - Sales and $P$	0

• 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.



#### Commission Preferences ★

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GENERAL SETTINGS ACCESS	RIGHTS
Commission Plan Numbering Sequen	ce: COMMISSPLN - Commission $P$
Rules Numbering Sequence:	COMMISSRUL - Commission ,0
Commission Numbering Sequence:	COMM - Commission general O
Activate AP Bill Import Cash Acct C	Override by Branch
Enable change/delete on sales ord	er lines with calculated commission
Require default invoice splits to ins	ert new detail lines
Require default Sales Order splits t	to insert new detail lines
COMMISSIONS CAN BE GENERATED	) FROM
✓ Sales Order	
✓ Contracts	
✓ Projects/Tasks	
PAYROLL INTEGRATION	
Enable Payroll Integration	
GL INTEGRATION	
C Enable GL Integration	
Default GL Account: 10100 - Pe	etty Cash 🔎 🧷
Subaccount: 000-000 -	Default 🔎 🖉
$\circlearrowright$ + $\times$ $\bowtie$	
🖹 🕕 🗋 Commission Status	Allowed
> 0 D Draft	
Approved	

• 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.

GL Reg	uired Fields		Commiss	ion Date Filter	Additional Commiss	ion Filters						
Actio	n:	New Batch *	From:		Plan ID:		Q	Pay Out Type:				
• Bran	ch:	PRODWHOLE - Products V ,0	0 To:		Salesperson ID:		Q					
* Tran	saction Date:	9/14/2022 -			Frequency:		*					
* Post	Period:	09-2022	0									
* Ledg	ier:	ACTUAL - Actual Ledger ,0	0									
* Acco	unt:	10100 - Petty Cash 🖉	0									
* Suba	eccount:	000-SNM - Sales and Mark A	0									
	Commissio	on 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-00002	26 Commission	SP0001	Jason Mendenhall	CP-000003	330.00		AR009871	100.00	330.00	Ready for Payment	Immediate
	CO-00002	27 Commission	SP0001	Jason Mendenhall	CP-000003	131.84		AR009872	100.00	131.84	Accrued	Immediate
	CO-00002	28 Commission	SP0001	Jason Mendenhall	CP-000003	100.00		AR009875	100.00	100.00	Ready for Payment	Immediate
	CO-00003	Commission	SP0001	Jason Mendenhall	CP-000003	23.33		AR009877	100.00	23.33	Accrued	Immediate
	CO-00003	32 Commission	SP0001	Jason Mendenhall	CP-000003	100.00		AR009876	100.00	100.00	Accrued	Immediate
	CO-00004	15 Commission	SP0001	Jason Mendenhall	CP-000003	93.30		AR009879	60.00	55.98	Accrued	Immediate
	CO-00004	46 Commission	SP0001	Jason Mendenhall	CP-000003	41.88		AR009879	60.00	25.13	Ready for Payment	Immediate
	CO-00004	18 Commission	SP0001	Jason Mendenhall	CP-000003	200.00		AR009878	100.00	200.00	Ready for Payment	Immediate
	CO-00005	50 Commission	SP0001	Jason Mendenhall	CP-000003	82.50		AR009878	100.00	82.50	Ready for Payment	Immediate
	CO-00006	63 Commission	SP0001	Jason Mendenhall	CP-000003	23.33		AR009883	100.00	23.33	Accrued	Immediate
	CO-00006	64 Commission	SP0001	Jason Mendenhall	CP-000003	100.00		AR009877	50.00	50.00	Accrued	Immediate
	CO-00006	5 Commission	SP0001	Jason Mendenhall	CP-000003	100.00		AR009881	100.00	100.00	Accrued	Immediate
	CO-00009	3 Commission	SP0001	Jason Mendenhall	CP-000003	61.74		AR009886	100.00	61.74	Ready for Payment	Immediate
	CO-00009	6 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.

Commissions	Dashboard							REFRESH ALL	DESIGN TOOLS -
COMMISSION	BY PLAN				0 MTD COMMISSIONS		429 YTD COMMISSIONS	ACCUMULATED SALES REVENUE	
<ul> <li>Is Empty</li> <li>CP-000001</li> </ul>	229.00 200.00	CP-306007							
THIS MONTH'S	S COMMISSIO	N DETAILS							🕐 Updated a moment ago
Plan ID	Date	Customer Name	Doc No	Order Nbr.	Inventory ID	Net	Commission Commission Commission Commission		us Threshold

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



Employees

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
  - o 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.

EP0000002 - N	Maxwell Bak	ær									
$\leftarrow$	∽ +	Ĉ •	N ال	< :	> >I	ACTIC	ons - II	NQUIRIES .	•		
* Employee ID:	EP0000	0002		Q	Sta	tus:	Active	•			
Employee Name:	Maxwel	l Baker									
GENERAL INFO	EMPLOYMEN	IT HISTO	RY FIN	ANCIAL SET	TINGS	ATTRIB	UTES	ACTIVITIES	MA	AILINGS COMPA	ANY TREE INF
CONTACT INFO					EMP	LOYEE	SETTINGS				
Title:	Mr.			•	Em	nployee R	Ref. No.:				
First Name:	Maxwel	I			* En	nployee C	lass:	EMPSTAN	ND - En	nployee - Standard	P 0
Middle Name:					* Bra	anch:		PRODWH	IOLE -	Products Wholesale	P 0
* Last Name:	Baker				* De	partment	:	FINANCE	- Finar	ice	P 0
Phone 1:	Home	•	+1 (777) 3	345-2246	* Ca	lendar:		PST - Pac	cific Tim	e Zone	P 0
Phone 2:	Cell	•	+1 (777) 3	345-2677	De	fault Wor	kgroup:				Q
Phone 3:	Busines	s 1 👻			Re	gular Hou	urs Validatio	n: Warning C	Dnly		•
Fax:	Home F	ax ▼			Re	ports to:					P 0
Email:	mbaker	@revisior	ntwo.com		Sa	lespersor	ו:				P 0
Web:				ď	Em	nployee L	ogin:	admin - ad	dmin ac	Imin	
ADDRESS INFO					Cu	rrency ID	:	USD	Q	Enable Currency	/ Override
					Cu	rr Rate T	vne:	SPOT	Q	C Enable Rate Ove	erride

• 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.



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<ul> <li>Employee ID: E20000000 P Status: Active →</li> <li>Employee Name: Michael Andrews</li> <li>GENERAL INFO EMPLOYMENT HISTORY FINANCIAL SETTINGS ATTRIBUTES ACTIVITIES MAILINGS COMPANY TREE INFO</li> <li>CONTACT INFO</li> <li>Title: Mr. ( )</li> <li>First Name: Michael</li> <li>Michael</li> <li>Employee Class: EMPSTAND - Employee - Standard P P</li> <li>Branch: Employee Class: EMPSTAND - Employee - Standard P P</li> <li>Iddide Name: ( )</li> <li>Enanch: PRODWHOLE - Products Wholesale P P</li> <li>Branch: PRODWHOLE - Products Wholesale P P</li> <li>Calendar: PST - Pacific Time Zone P P</li> <li>Cell → ( )</li> <li>Default Workgroup: PST - Pacific Time Zone P</li> <li>Calendar: PST - Pacific Time Zone P</li> <li>Calendar: PST - Pacific Time Zone P</li> <li>Cell → ( )</li> <li>Default Workgroup: PST - Pacific Time Zone P</li> <li>Cell → ( )</li> <li>Regular Hours Validator: Warning Only → ( )</li> <li>Sales INFO Country ( )</li> <li>Gentle</li> <li>Address Line 1: A17 32nd Ave E</li> <li>Country: US - United States of America P</li> <li>Seatus</li> <li>WA-WASHINGTON P</li> <li>PERSONAL INFO</li> <li>PERSONAL INFO</li> <li>PERSONAL INFO</li> <li>Personal Cuke</li> <li>Synchronize to Exchange</li> </ul>							
GENERAL INFO EMPLOYMENT HISTORY FINANCIAL SETTINGS ATTRIBUTES ACTIVITES MAILINGS COMPANY TREE INFO      CONTACT INFO Intelline	* Employee ID:	EP00000001	ρ	Status: Active	•		
CONTACT INFO EMPLOYEE SETTINGS   Title: Mr.   First Name: Michael   Middle Name: -   Last Name: Andrews   Phone 1: Home •   Phone 2: Cell   Phone 3: Business 1 •   Fax: Home Fax •   Email: mandrews@revisiontwo.com   Web: C   ADDRESS INFO Seattle   Address Line 1: 417 32nd Ave E   Address Line 2: Curre.cy ID:   City: Seattle   * Country: US - United States of America P   State: WA-WASHINGTON	Employee Name:	Michael Andrews					
Title: Mr. Employee Ref. No.:   First Name: Michael   Middle Name: Employee Class:   Middle Name: Employee Class:   Andrews PRODWHOLE - Products Wholesale P   * Last Name: Andrews   Phone 1: Home   Phone 2: Cell   Phone 3: Business 1   Business 1 Employee Class:   Phone 3: Business 1   Fax: Home Fax   Imadrews@revisiontwo.com Salesperson:   Veb: Employee Login:   andrews Salesperson:   Salesperson: SPO01   Veb: Currency ID:   US - Direct Manager   Address Line 1: 417 32nd Ave E   Address Line 2: Currency ID:   City: Seattle   * Country: US - United States of America   State: WA-WASHINGTON	GENERAL INFO	EMPLOYMENT HISTORY FINANCIAL S	SETT	INGS ATTRIBUTES AC	CTIVITIES MA	AILINGS COMPAN	Y TREE INFO
First Name: Michael   Middle Name: <ul> <li>Employee Class:</li> <li>EMPSTAND - Employee - Standard</li> <li>PRODWHOLE - Products Wholesale</li> <li>Branch:</li> <li>PRODWHOLE - Products Wholesale</li> <li>ADMIN - Administration</li> <li>ADMIN - Administration</li> <li>Cell</li> <li>Phone 3:</li> <li>Business 1</li> <li>Cell</li> <li>Business 1</li> <li>Cell</li> <li>Regular Hours Validation:</li> <li>Warning Only</li> <li>Regular Hours Validation:</li> <li>Salesperson:</li> <li>SP0001</li> <li>SP001</li> <li>O'</li> </ul> ADDRESS INFO   Address Line 1:   Atdress Line 2:   City:   Seattle   City:   Seattle   * Country:   US - United States of America   * Country:   State:   Wa- WASHINGTON	CONTACT INFO			EMPLOYEE SETTINGS			
Middle Name:     * Last Name: Andrews   * Last Name: Andrews   * Last Name: Andrews   * Last Name: Andrews   Phone 1: Home •   Phone 2: Cell •   Phone 3: Business 1 •   Business 1 • Default Workgroup:   Fax: Home Fax •   Email: mandrews@revisiontwo.com   Web: C   ADDRESS INFO Currency ID:   Address Line 1: 417 32nd Ave E   Address Line 2: Currency ID:   City: Seattle   * Country: US - United States of America P   State: WA - WASHINGTON	Title:	Mr.	•	Employee Ref. No.:			
* Last Name: Andrews   Andrews Andrews   Phone 1: Home •   Phone 2: Cell •   Phone 3: Business 1 •   Business 1 • Cell •   Fax: Home Fax •   Imandrews@revisiontwo.com Regular Hours Validation:   Web: Cell •   Maddress INFO Salesperson:   AbDRESS LOOKUP Salesperson:   Address Line 1: 417 32nd Ave E   Address Line 2: City:   Seatte Currency ID:   Vate Emails Route Emails   City: Seatte   * Country: US - United States of America   State: WA-WASHINGTON	First Name:	Michael		* Employee Class:	EMPSTAND - En	nployee - Standard 🛛 🔎	0
Phone 1: Home   Phone 2: Cell   Cell Cell   Phone 3: Business 1   Business 1 Cell   Fax: Home Fax   mandrews@revisiontwo.com Regular Hours Validation:   Web: Currency ID:   ADDRESS INFO   Address Line 1: 417 32nd Ave E   Address Line 1: 417 32nd Ave E   Address Line 1: Seattle   City: Seattle   * Country: US - United States of America   State: WA - WASHINGTON	Middle Name:			* Branch:	PRODWHOLE -	Products Wholesale	0
Phone 2: Cell   Phone 3: Business 1   Business 1 Regular Hours Validation:   Fax: Home Fax   Mandrews@revisiontwo.com Regouts to:   Email: mandrews@revisiontwo.com   Web: Seloeperson:   ADDRESS INFO Seloeperson:   ADDRESS LOOKUP Currency ID:   Address Line 1: 417 32nd Ave E   Address Line 2: Curr. Rate Type:   Seattle Curr. Rate Type:   City: Seattle   * Country: US - United States of America   State: WA - WASHINGTON	* Last Name:	Andrews		* Department:	ADMIN - Adminis	stration 🔎	0
Phone 3: Business 1   Fax: Home Fax   Home Fax Regular Hours Validation:   Warning Only   Email: mandrews@revisiontwo.com   Web: Salesperson:   SP0001   ADDRESS INFO   ADDRESS LOOKUP   Address Line 1:   417 32nd Ave E   Address Line 1:   417 32nd Ave E   Labor Item:   Labor Item:   Labor Item:   City:   Seattle   * Country:   US - United States of America   State:   WA - WASHINGTON	Phone 1:	Home 👻		* Calendar:	PST - Pacific Tim	ne Zone 🖉	0
Fax: Home Fax   Email: mandrews@revisiontwo.com   Web: Image: SP0001   Web: Image: SP0001   ADDRESS INFO Image: SP0001   ADDRESS LOOKUP Image: SP0001   Address Line 1: 417 32nd Ave E   Address Line 2: Image: SP001   City: Seattle   * Country: US - United States of America   State: WA - WASHINGTON	Phone 2:	Cell 👻		Default Workgroup:		2,	
Email: mandrews@revisiontwo.com   Web: Image: Selesperson:   Web: Image: Selesperson:   ADDRESS INFO Image: Employee Login:   ADDRESS LOOKUP Currency ID:   ADDRESS LOOKUP Curr. Rate Type:   Address Line 1: 417 32nd Ave E   Address Line 2: Image: Currency ID:   City: Seattle   * Country: US - United States of America   State: WA - WASHINGTON     State: WA - WASHINGTON     Selesperson: SP001   Selesperson: SP001   Image: Image	Phone 3:	Business 1 👻		Regular Hours Validation:	Warning Only	-	
Web:       Image: Constraint of the sector of	Fax:	Home Fax 👻		Reports to:	EP0000002 - M	laxwell Baker 🖉 🔎	0
ADDRESS INFO       Currency ID:       USD        Enable Currency Override         ADDRESS LOOKUP       Curr. Rate Type:       SPOT        Enable Rate Override         Address Line 1:       417 32nd Ave E       Labor Item:       LABORPM - Labor - Project Manager          Address Line 2:       Image: City:       Seattle       Image: City:       Seattle         * Country:       US - United States of America       Synchronize to Exchange       Synchronize to Exchange         State:       WA - WASHINGTON       PERSONAL INFO       Enable Currency Override	Email:	mandrews@revisiontwo.com		Salesperson:	SP0001	2	0
ADDRESS LOOKUP     Curr. Rate Type:     SPOT     Enable Rate Override       Address Line 1:     417 32nd Ave E     Labor Item:     LABORPM - Labor - Project Manager O       Address Line 2:     Image: City:     Seattle     Image: City: C	Web:		ß	Employee Login:	andrews - Michae	el Andrews	
Address Line 1:     417 32nd Ave E     Labor Item:     LABORPM - Labor - Project Manager P       Address Line 2:     Image: City:     Seattle     Image: City: Country:       * Country:     US - United States of America P     Image: City: Country: Country:       State:     WA - WASHINGTON     PERSONAL INFO	ADDRESS INFO			Currency ID:	USD ,0	Enable Currency O	verride
Address Line 2:     Image: City:     Seattle     Image: City:       * Country:     US - United States of America     O       State:     WA - WASHINGTON     O		ADDRESS LOOKUP		Curr. Rate Type:	SPOT $ \mathcal{P} $	Enable Rate Overri	de
City:     Seattle     Image: Constraint of the seattle       * Country:     US - United States of America     O       State:     WA - WASHINGTON     PERSONAL INFO	Address Line 1:	417 32nd Ave E		Labor Item:	LABORPM - Lab	or - Project Manager 🔎	
* Country: US - United States of America State: WA - WASHINGTON VA - WA - WASHINGTON VA - WASHIN	Address Line 2:			I	Route Emails		
State: VA - WASHINGTON PERSONAL INFO	City:	Seattle		(	Time Card is R	equired	
	* Country:	US - United States of America	Q	(	Synchronize to	Exchange	
Postal Code:         98112         Date Of Birth:         1/14/1961	State:	WA - WASHINGTON	Q	PERSONAL INFO			
	Postal Code:	98112		Date Of Birth:	1/14/1961 -		

• 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.



#### Employees

* Employee ID:	EP0000008	ې	Status: Active	•		
Employee Name:	Michal Bujacek					
GENERAL INFO	EMPLOYMENT HISTO	RY FINANCIAL SE	TTINGS ATTRIBUTES A	CTIVITIES M/	AILINGS COMPANY	TREE IN
CONTACT INFO			_ EMPLOYEE SETTINGS _			
Title:		· · · · · · · · · · · · · · · · · · ·	Employee Ref. No .:			
First Name:	Michal		* Employee Class:	EMPHOURLY - E	Employee - Hourly 💫 🔎	0
Middle Name:			* Branch:	PRODWHOLE -	Products Wholesale	0
Last Name:	Bujacek		* Department:	SALES - Sales	م	0
Phone 1:	Home 🔹	206-321-0942	* Calendar:	PST - Pacific Tim	ne Zone 🖉 🔎	0
Phone 2:	Cell 👻		Default Workgroup:		Q,	
Phone 3:	Business 1 👻		Regular Hours Validation:	Warning Only	*	
Fax:	Home Fax 👻		Reports to:	EP0000002 - M	laxwell Baker	0
Email:	mbujacek@revisi	ontwo.com	] Salesperson:	SP0002	م	0
Web:		Ľ	Employee Login:	bujacek - Michal	Bujacek	
ADDRESS INFO			Currency ID:	USD 🔎	Enable Currency O	verride
	ADDRESS LOOK	UP	Curr. Rate Type:	SPOT ,0	Enable Rate Overrie	de
Address Line 1	816 26th Ave		Labor Item:	LABORSALES -	Labor - Sales Q	

• 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

Flat Rate Plan Set up Salespersons Set up a Customer **Inventory** Items Set up a Flat Rate Commission Plan Assign Salespersons to the plan Create invoice Calculate commission Result Quota Plan Set up Salespersons Set up a Quota Commission Plan **Tables tab Relations tab** Parameters tab **Condition tab** Grouping tab **Result grid tab** Assign Salespersons to the plan Create invoice Calculate commission Result **Roll Up Plan** Set up Salespersons Set up a Customer **Inventory Items** Set up a Roll Up Commission Plan Assign Salespersons to the plan Create invoice Calculate commission Result

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%.

Customers

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	6	+ × I↔I ⊃ Salesperson ID	Name		Role			Commission	Split %	Primary	
3 (		Salesperson	line -		Role Salesperson				Split % 00000	Primary	
8		Salesperson	Name					50.0			

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

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])

	Plan ID:	CP-000002	0	Pay Out Type:	Immediate	•
			Q		Immediate	
		Is Active		Commission Value Type:	Expression Builder	•
*	Plan Name:	TheBuyer Flat Rate		Frequency:	Monthly	
*	Start Date:	6/1/2019 -				
*	End Date:	12/31/2019 -				
	Plan Type:	Flat Rate	·			
R	ULES					
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> (	D CP-	000002-CR-000009	=[ARTran.InventoryID]	='LAPTOP16' =0.05*([ART	[ran.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

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	0	۵		Commission ID	Commission Type	Salesperson Name	Plan ID T	Commission Split %	Commission Amount	Inventory ID †
>	0			CO-000662	Commission	Salesperson1	<u>CP-000002</u>	50.00	250.00	LAPTOP16
	0			CO-000664	Commission	Salesperson2	<u>CP-000002</u>	30.00	150.00	LAPTOP16
	0			CO-000666	Commission	Salesperson3	<u>CP-000002</u>	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 3<sup>rd</sup> 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

Commission Plan

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	-		Transmort					
	PI	an ID:	CP-000003		Pay C	out Type:	Immediate	•
			<ul> <li>Is Active</li> </ul>		Frequ	ency:	Monthly	
	* Pl	an Nam	e: Invoices		* Targe	t:		Q
	* St	art Date	: 10/1/2019 -		Comr	nission Type:	Flat Amount	•
	* Er	nd Date:	12/31/2019 -					
	PI	an Type	Quota		-			
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	0		-000003-CR-000011	3.00	500.00			

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.

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## **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:



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## For the second relations:

Generic Inquiry ★ 8 0 + 间 I< < >> VIEW INQUIRY EXPORT AS REPORT Invoices 01/10-31/12 Q 3 columns \* Inquiry Title: Arrange Parameters in: Site Map Title: Select top: 0 records TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER RESULTS GRID Table Relations Ò +0 X  $\uparrow$  $\mathbf{1}$ |↔| X BOD Active Parent Table Join Type Child Table 0 0 ~ ARInvoice Inner ARTran  $\square$ ARTran Inner **CWACCommissionSplit** 0 0  $\mathbf{r}$ CWACCommissionSplit CWACSalesPersonCommissionPlan Inner 0 0  $\checkmark$ CWACSalesPersonCommissionPlan Inner CWACCommissionPlan Data Field Links For Active Relation C  $+ \times \uparrow$ ↓ |+| X 🖻 🖟 🗋 Parent Field Condition Child Field Operator ARTran.NoteID CWACCommissionSplit.RefNoteId Equals And

## For the third relation:

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## For the fourth relation:

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Ta	able	Relati	ons									
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## **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.



Generic Inquiry 🔸

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## **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.

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6	0	D	2		ARInv	oice.Do	ocDate	9			Is Between	=[CWACCommission	nPlan.StartDate1	=[CWACCommissionPlan.EndDate]	And

## Grouping tab

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





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## **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.

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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.

Reference Nbr.:		Customer:	000000006 - Accel Ente	ertainment 2	Detail Total:	1,882.00	
	<new> ,P</new>	* Location:	MAIN - Primary Location	Q	Discount Total:	0.00	
Status:	Balanced	Currency:	USD 1.00	VIEW BASE	Tax Total:	0.00	
	Hold	* Terms:	NET30 - Net due in 30 D	lays from Invo ,P	Balance:	1,882.00	
Date:	10/25/2019 *	* Due Date:	11/24/2019 *		Cash Discount:	0.00	
Post Period:	10-2019 P	* Cash Discount	10/25/2019 *				
DOCUMENT DE	TAILS FINAN	CIAL DETAILS ADI	DRESS DETAILS TA	K DETAILS SA	LESPERSON COMMISSI	ON DISCOUNT DET	AILS APPLI
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## **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.

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	0			Commission ID	Commission Type	Salesperson Name	т Plan ID т	Commission Amount	Threshold	Commission Status	Pay Out Type	Plan Type	Commission Date
	0			CO-000701	Commission	Salesperson1	CP-000003	150.00	1.00	Calculated	Immediate	Quota	10/25/2019
	0	D		CO-000702	Commission	Salesperson1	CP-000003	500.00	3.00	Calculated	Immediate	Quota	10/25/2019



# **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.

Commissio	on Plan		
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Plan ID:	CP-000008	Pay Out Type:	Immediate -
	Draft Commissions	Commission Value Type	E Generic Inquiry
	✓ Is Active	Frequency:	Monthly
* Plan Name:	Manager's Commission Plan		
* Start Date:	1/1/2020 -		
* End Date:	12/31/2025 -		
Plan Type:	Flat Rate -		
	Skip 0 Commissions		
	🗹 Roll Up Plan		
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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



### **Commission Plan**

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	✓ Is Active	Frequency:	Monthly -
* Plan Name:	Manager's Commission Plan		
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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.

Employees					🗋 NOTES
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* Employee ID:	EP0000007	م	* Status: Active	¥	
Employee Name:	Pam Brawner				
GENERAL INFO	MPLOYMENT HISTORY	FINANCIAL SET	TINGS ATTRIBUTES A	ACTIVITIES MAILINGS	COMPANY TREE
CONTACT INFO			EMPLOYEE SETTINGS _		
Employee Contact:	Pam Brawner		Employee Ref. No.:		
Title:	Ms.	•	* Employee Class:	EMPHOURLY - Employee	- Hourly 🔎 🧷
First Name:	Pam		∗ Branch:	PRODWHOLE - Products	Wholesale 🔎 🧷
Middle Name:			* Department:	SALES - Sales	0
* Last Name:	Brawner		* Calendar:	PST - Pacific Time Zone	P 0
Phone 1:	Home - +1 (777)	234-2200	Regular Hours Validation	Warning Only	-
Phone 2:	Cell 👻		Reports to:	EP00000024 - Jason Mend	denhall 🔎 🖉
Phone 3:	Busi 👻		Salesperson:	SP0006	0
Fax:	Hom 💌		Employee Login:	brawner - Pam Brawner	
Email:	pbrawner@revisiontwo.c	xom 🖂	Currency ID:	USD $P$ Enab	le Currency Override
Web:		ď	Curr. Rate Type:	SPOT $\rho$ Enab	ele Rate Override
ADDRESS INFO			Labor Item:	LABORSALES	Q
Address Line 1:	5571 NE 17th St			Route Emails	
Address Line 2:				Time Card is Required	
City:	Renton			✓ Staff Member in Service N	vlanagement
* Country:	US - United States of An	nerica ,0	PERSONAL INFO		
State:	WA - WASHINGTON	Q	Date Of Birth:	3/4/1975 👻	
Postal Code:	98059				



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-touse 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.

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AdvancedCommis	ission.CW.DAC.CWACCommissionPlan		CommissionF	Plan	
AdvancedCommis	ission.CW.DAC.CWACCommissionSplit		CWACComm	issionSplit	
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PX.Objects.AR.A	RTran		ARTran		
PX.Objects.AR.Sa	alesPerson		SalesPerson		
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PX.Objects.EP.EF	PEmployee		EPSupervisor	r	



## **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:

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#### Generic Inquiry

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## **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.



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	SalesPersonId	CWACSalesPersonCom	Sales Person Id		1

## **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.

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## Grouping tab

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



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## **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.

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Generic Inquiry
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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.

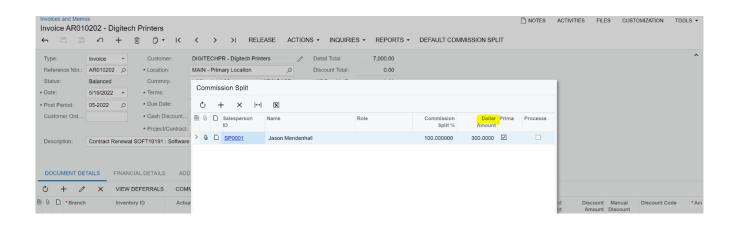
## Assign Salespersons to the plan

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.

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**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.

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## **Calculate commission**

In the Calculate Commission (CWAC5010) form, check the "Manager's Commission Plan" plan and process it.

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9 0	9		Plan ID	Plan Name	Plan Type	Start Date	End Date	Pay Out Type	Frequency	Status
(	0		CP-000001	Percent of Product Profit	Flat Rate	1/1/2020	12/31/2020	Immediate	Monthly	Active
(	0		CP-00002	Quota Tier Bonus	Quota	1/1/2020	12/31/2020	Immediate	Monthly	Active
(	0		CP-00003	Commission by Item Class	Flat Rate	1/1/2020	12/31/2020	Immediate	Monthly	Active
(	0		<u>CP-000004</u>	US 1	Flat Rate	6/16/2019	1/1/2025	Immediate	Monthly	Active
(	0		CP-000005	UK 1	Flat Rate	6/15/2020	1/1/2025	On Paid Invoice	Monthly	Active
(	0		CP-000006	Commission by Item Class On p	Flat Rate	1/1/2020	12/31/2020	On Paid Invoice	Monthly	Active
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## Result

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

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0	) [		CO-000313	Commission	SP0001	Jason Mendenhall	CP-000004	20.00		AR008396	60.00	12.00
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# **Form Reference Information**

CWAC1010 Commission Preferences CWAC3010 Commission Adjustment CWAC4010 Commission Plan CWAC4030 Commission Plans CWAC4020 Commission Plans CWAC5010 Calculate Commissions CWAC5010 Calculate Commissions CWAC5020 Approve Commissions CWAC5030 Pay Commissions CWAC5030 Pay Commissions CWAC5040 Process Commissions Advanced Commissions AR3010PL Invoices and Memos form changes Advanced Commissions SO3010PL Sales Orders form changes Advanced Commissions CT3010PL Customer Contracts form changes Advanced Commissions AR2050PL Salespersons form changes Advanced Commissions AR3030PL Customer Master form changes

# **CWAC1010** Commission Preferences

Form ID: (CWAC1010)



## **Commission Preferences**

#### 

GENERAL SETTINGS ACCESS RIGHTS

NUMBERING PREFERENCES	
* Commission Plan Numbering Sequence:	COMMISSPLN - Commission &
* Rules Numbering Sequence:	COMMISSRUL - Commission &
* Commission Numbering Sequence:	COMM - Commission general P
Activate AP Bill Import Cash Acct Override	e by Branch
Enable change/delete on sales order lines	s with calculated commission
Require default invoice splits to insert new	v detail lines
Require default Sales Order splits to inser	rt new detail lines
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* Subaccount: 000-SNM - Sales	and D
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> 0 D Draft	
0 D Approved	

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.



	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.
Commissions Can Be Calculated From	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

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DOCUMENT	USER-DEF									
* Order Type:	SO	A * Customer:	2015797 - BRIAN SCOTT Mc	KENZIE 🔎 🧷 Ord	ered Qty.:	4.00				
Order Nbr.:	015152	A * Location:	MAIN - Primary Location	P Disc	count Total:	0.00				
	Hold		Credit Hold	Тах	Total:	0.00				
Status:	Open	* Project:	X - Non-Project Code.	P 🖉 Ord	er Total:	11,403.00				
* Date:	5/28/2020	<ul> <li>Description:</li> </ul>	GEORGIA GREY SPECIAL O	RDER MM						
* Requested On:	8/28/2020	•								
Customer Ord										
Customer Ord External Refer										
		ORDER INFO ESTI	JATES PLOT PLAN SEF	RVICES FLUSH-BE	VEL BRON	ZE SLANT-MONU	MENT ELMH	JRST CEMETER)	TAX DETAILS	FINANCIAL
External Refer	DETAILS	ORDER INFO ESTII		RVICES FLUSH-BE		ZE SLANT-MONU		JRST CEMETERY	TAX DETAILS	FINANCIAL
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External Refer Source Document Control + 2 B 0 □ L	DETAILS	ALLOCATIONS ADD IN	VOICE ADD STOCK ITEM	COMMISSION SPLIT	PO LINK	INVENTORY SUMMAR	Y  ⊷  ⊠ Q	<u>t</u>	Price Amount	Ext. Pri
External Refer	DETAILS 2 × P ine *Branch 6 230 4 230	ALLOCATIONS ADD IN Inventory ID SPECIALORDER-T-L SETTEDEVIEDNAL	VOICE ADD STOCK ITEM	COMMISSION SPLIT	PO LINK	INVENTORY SUMMAF ption GREY,3-0 X 3-0 X 3-0,	Y  ⊷  ⊠ Q	t.           uantity         Unit           1.00         5,701.5	Price Amount	

Sales Orders				
← SAVE & (	CLOSE 🗒	∽ + ₪		ACTIONS -
DOCUMENT	USER-DEFINED	FIELDS		
* Order Type:	SO ,2	* Customer:	2015797 - BRIAN SCOTT McKENZ	ZIE 🔎 🧷 Ord
Order Nbr.:	015152 🔎	* Location:	MAIN - Primary Location	, Dis
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Status:	Open	* Project:	X - Non-Project Code.	P 🖉 Ord
* Date:	5/28/2020 -	Description:	GEORGIA GREY SPECIAL ORDE	R MM
* Requested On:	8/28/2020 -			
Customer Ord				
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DOCUMENT DE	TAILS ORDER		g this line will remove the associated d commissions	FLUSH-BEVE
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	ne <sup>*</sup> Branch <sup>*</sup> In br.	iventory ID	Warehouse	Completed
× O D	6 230 <u>SI</u>	PECIALORDER-T-L	011-HILLSIDE-SHOP	
0 0	4 230 <u>SI</u>	ETTEREXTERNAL	230-RESURRECTION	
0 D	8 230 <u>SI</u>	PECIALORDER-T-L	011-HILLSIDE-SHOP	



## **Table Toolbar**

The table toolbar includes standard buttons. For the list of standard buttons, see <u>Table Toolbar</u>.

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	GENERAL SETTINGS ACCES	S RIGHTS			
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8	*Roles	Superadmin			
>	AcumaticaSupport				
	Administrator	$\checkmark$			
	Anonymous				
	AP Admin				
	AP Clerk				
	AP Viewer				
	AR Admin				
	AR Clerk				
	AR Viewer				
	BI				
	BRANCH CAP				
	BRANCH HQ				
	BRANCH VA				
	BusinessDateOverride				
	CA Admin				
	CA Clerk				
	CA Viewer				
	CM Admin				
	CM Viewer				



## **Access Rights Tab**

Column	Description					
	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 <u>Built-In Roles</u> in Role-Based Access and <u>Project Security</u> for the Project role.					
Roles	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:					
	<ul> <li>Commission Administrator: A user with this role can calculate and process system Commissions. This user can also add Commission Adjustments.</li> <li>Plan Administrator: A user with this role can create Plans, tie Salespersons to the Commission Plans, and define splits between various Salespersons and Managers.</li> <li>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.</li> <li>The Security Roles can also be modified to your company-specific requirements.</li> </ul>					
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.



<ul> <li>Branch ID:</li> </ul>	010		Q		Active				
<ul> <li>Branch Name:</li> </ul>	PTMC-RETAIL								
Company:	PTMC - Peter Tro	ost Monument Co	mpan						
BRANCH DETAILS	DELIVERY SETTING	S EMPLOYE	ES	LEDGER		GL ACC			
MAIN CONTACT						COMM			
Company Name:	PETER TROOST	MONUMENT CO		SIs	spsn AP	P Bill Ca	sh A	BMOPAY8050 - HARRIS - PAYMENT	۶P
Attention:	MICHELE STACH	NIK		CON	IFIGUR/	ATION S	ETTING	S	
Email:	Michele.stachnik	@troost.com		Ac	cess Ro	ole:		Branch 010 - Branch 010 access	Q
Web:			ß	De	fault Co	untry:			Q
Phone 1:	(708)544-0916			TAX	REGIST	TRATION	I INFO		
Phone 2:				* Leg	gal Nam	ne:		PTMC-RETAIL	
Fax:				Tax	c Regist	tration ID	):	61-1468819	
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# 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	<ul> <li>Two options are available:</li> <li>Flat Rate: the commission for the Flat Rate Plan is applied one time and is based on a flat commission.</li> <li>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.</li> </ul>			
Pay Out Type	<ul> <li>Two options are available:</li> <li>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.</li> <li>On Paid Invoice: the commission is paid once the invoice that the commission was calculated from is paid in full.</li> </ul>			
Commission Value Type	<ul> <li>Two options are available:</li> <li>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.</li> <li>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.</li> </ul>			



Frequency	Three options are available: <ul> <li>Monthly</li> <li>Quarterly</li> <li>Yearly</li> </ul>
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	<ul> <li>The way the commission will be calculated.</li> <li>Two options are available: <ul> <li>Generic inquiry: you need to specify the source and calculation formula in an Inquiry.</li> <li>Flat Amount: you can apply a fixed commission.</li> </ul> </li> </ul>

## **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	<ul> <li>The Value will be based on the Plan Type parameters selected in the summary area:</li> <li>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.</li> <li>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.</li> <li>If Plan Type is Quota and Commission Type is Flat Amount, the Value is numeric.</li> <li>If Plan Type is Quota and Commission Type is Generic Inquiry, the Value is a lookup field with the list of available Generic Inquiries.</li> </ul>



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

### 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 <u>Filtering Area</u>.

#### 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 <u>Numbering Sequences (CS201010)</u> form and applied for Commission Plan.
Plan Name	The Plan's name as it should appear on documents.
Plan Type	<ul> <li>Two options are available:</li> <li>Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission</li> <li>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.</li> </ul>
Start Date	The date when the commission plan comes into effect.
End Date	The date when the commission plan is expired.



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

## 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 <u>Form Toolbar</u>. The form-specific button is described below.

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

#### **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	<ul> <li>Two types are possible:</li> <li>Commission: a record created from the Calculate Commissions form</li> <li>Commission Adjustment: a record created from the Commission Adjustment form</li> </ul>
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	<ul> <li>Five options are available depending on the current commission's status:</li> <li>Calculated</li> <li>Approved</li> <li>Accrued</li> <li>Ready for Payment</li> <li>Paid</li> </ul>
Pay Out Type	Two options are available: <ul> <li>Immediate</li> <li>On Paid Invoice</li> </ul>



	Two options are available.
Plan Type	<ul> <li>Two options are available:</li> <li>Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission</li> <li>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.</li> </ul>
Frequency	<ul> <li>Three options are available:</li> <li>Monthly</li> <li>Quarterly</li> <li>Yearly</li> </ul>
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.
Туре	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	<ul> <li>The document type. The following types are available:</li> <li>Invoice: A document that contains a list of goods sold or services provided.</li> <li>Debit Memo: A document that debits a customer for any business reason, such as undercharging for a previous invoice.</li> <li>Credit Memo: A document that credits a customer for any business reason such as damaged goods or a previous overcharging invoice.</li> <li>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.</li> <li>Credit WO: A document that writes off a small credit of the customer.</li> </ul>
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	<ul> <li>Two options are available:</li> <li>True: the transaction was released</li> <li>False: the transaction was not released</li> </ul>
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 <u>Form Toolbar</u>.

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	<ul> <li>Selector field. Two options for Commission Plans statuses are available:</li> <li>Active</li> <li>Inactive</li> </ul>
Start Date	<ul> <li>Calendar fields:</li> <li>From: the earliest date of Commission Plan start date</li> <li>To: the latest date of Commission Plan start date</li> </ul>
End Date	<ul> <li>Calendar fields:</li> <li>From: the earliest date of Commission Plan end date</li> <li>To: the latest date of Commission Plan end date</li> </ul>



#### **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	<ul> <li>Two options are available:</li> <li>Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission.</li> <li>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.</li> </ul>
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	<ul><li>Two options are available:</li><li>Immediate</li><li>On Paid Invoice</li></ul>
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 <u>Form Toolbar</u>.

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	<ul> <li>Calendar fields:</li> <li>From: the earliest date when the Commission was created</li> <li>To: the latest date when the Commission was created</li> </ul>
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: <ul> <li>Monthly</li> <li>Quarterly</li> <li>Yearly</li> </ul>
Pay Out Type	Two options are available: <ul> <li>Immediate</li> <li>On Paid Invoice</li> </ul>

#### **Table Columns**

Element	Description
Commission ID	The reference number for the Commission document in the system.
Commission Type	<ul> <li>Two types are available:</li> <li>Commission: a record created from the Commission Plan form</li> <li>Commission Adjustment: a record created from the Commission Adjustment form</li> </ul>
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	<ul> <li>Five options are available depending on the current commission's status:</li> <li>Calculated</li> <li>Approved</li> <li>Accrued</li> <li>Ready for Payment</li> <li>Paid</li> </ul>
Pay Out Type	<ul> <li>Two options are available:</li> <li>Immediate</li> <li>On Paid Invoice</li> </ul>
Plan Type	<ul> <li>Two options are available:</li> <li>Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission</li> <li>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.</li> </ul>
Frequency	Three options are available: <ul> <li>Monthly</li> <li>Quarterly</li> <li>Yearly</li> </ul>
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.
Туре	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	<ul> <li>The document type. The following types are available:</li> <li>Invoice: A document that contains a list of goods sold or services provided.</li> <li>Debit Memo: A document that debits a customer for any business reason, such as undercharging for a previous invoice.</li> <li>Credit Memo: A document that credits a customer for any business reason such as damaged goods or a previous overcharging invoice.</li> <li>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.</li> <li>Credit WO: A document that writes off a small credit of the customer.</li> </ul>
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	<ul> <li>Two options are available:</li> <li>True: the transaction was released</li> <li>False: the transaction was not released</li> </ul>
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 <u>Form Toolbar</u>.

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	<ul> <li>Calendar fields:</li> <li>From: the earliest date when Commission was created</li> <li>To: the latest date when Commission was created</li> </ul>
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: <ul> <li>Monthly</li> <li>Quarterly</li> <li>Yearly</li> </ul>
Pay Out Type	Two options are available: <ul> <li>Immediate</li> <li>On Paid Invoice</li> </ul>

#### **Table Columns**

Element	Description
Commission ID	The reference number of the Commission document in the system.
Commission Type	<ul> <li>Two types are possible:</li> <li>Commission: a record created from the Calculate Commissions form</li> <li>Commission Adjustment: a record created from the Commission Adjustment form</li> </ul>
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	<ul> <li>Five options are available depending on the current commission's status:</li> <li>Calculated</li> <li>Approved</li> <li>Accrued</li> <li>Ready for Payment</li> <li>Paid</li> </ul>
Pay Out Type	<ul> <li>Two options are available:</li> <li>Immediate</li> <li>On Paid Invoice One shows commissions based on a plan with selected Pay Out Type</li> </ul>
Plan Type	<ul> <li>Two options are available:</li> <li>Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission</li> <li>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.</li> </ul>
Frequency	Three options are available: <ul> <li>Monthly</li> <li>Quarterly</li> <li>Yearly</li> </ul>
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.
Туре	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	<ul> <li>The document type. The following types are available:</li> <li>Invoice: A document that contains a list of goods sold or services provided.</li> <li>Debit Memo: A document that debits a customer for any business reason, such as undercharging for a previous invoice.</li> <li>Credit Memo: A document that credits a customer for any business reason such as damaged goods or a previous overcharging invoice.</li> <li>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.</li> <li>Credit WO: A document that writes off a small credit of the customer.</li> </ul>
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	<ul> <li>Two options are available:</li> <li>True: the transaction was released</li> <li>False: the transaction was not released</li> </ul>
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 <u>Form Toolbar</u>.

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	<ul> <li>Two types are possible:</li> <li>Commission: a record created from the Commission Plan form</li> <li>Commission Adjustment: a record created from the Commission Adjustment form</li> </ul>
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	<ul> <li>Five options are available depending on the current commission's status:</li> <li>Calculated</li> <li>Approved</li> <li>Accrued</li> <li>Ready for Payment</li> <li>Paid</li> </ul>
Pay Out Type	Two options are available: <ul> <li>Immediate</li> <li>On Paid Invoice</li> </ul>
Plan Type	<ul> <li>Two options are available:</li> <li>Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission</li> <li>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.</li> </ul>



Frequency	Three options are available: <ul> <li>Monthly</li> <li>Quarterly</li> <li>Yearly</li> </ul>		
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.		
Туре	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	<ul> <li>The document type. The following types are available:</li> <li>Invoice: A document that contains a list of goods sold or services provided.</li> <li>Debit Memo: A document that debits a customer for any business reason, such as undercharging for a previous invoice.</li> <li>Credit Memo: A document that credits a customer for any business reason such as damaged goods or a previous overcharging invoice.</li> <li>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.</li> <li>Credit WO: A document that writes off a small credit of the customer.</li> </ul>		
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.		
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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	<ul> <li>Two options are available:</li> <li>True: the transaction was released</li> <li>False: the transaction was not released</li> </ul>	
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 <u>Table Toolbar</u>. Upon installing the Advanced Commission Module, the button **Commission Split** is added. The table-specific buttons are listed below.

Button	Description	
	Salespersons as receive an over commission spl Calculations bu columns are inc	mission Split dialog box, which shows the commission split percentage between asigned to the specified Invoice Line. If a salesperson, such as a manager, should ride on top of the commission split, enter that salesperson (manager) with a 0% it. This will allow the line to also be tagged to the Manager for Commission t does not interfere with the 100% required commission splits. The following cluded in the installation; however, additional custom fields may be added if nmission calculations and conditions.
	Columns	Description
	Salesperson ID	The unique identifier of the salesperson assigned to the Invoice line.
	Name	The salesperson's name as it should appear on documents.
Commission Split	Role	<ul> <li>The salesperson's role is specified on the Salesperson form: Three options are available:</li> <li>Salesperson</li> <li>Manager</li> <li><i>empty</i></li> </ul>
	Commission Split %	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.
	Dollar Amount	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.
	Primary	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.



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

Button	Description	
	between Sales such as a mana salesperson (m the Manager fo commission sp	ault Commission Split dialog box, which shows the commission split percentage bersons assigned to each new detail line added to the Invoice. If a salesperson, ager, should receive an override on top of the commission split, enter that anager) with a 0% commission split. This will allow the line to also be tagged to be commission Calculations but does not interfere with the 100% required lits. The following columns are included in the installation; however, additional may be added if needed for Commission calculations and conditions.
	Columns	Description
	Salesperson ID	The unique identifier of the salesperson assigned to the Invoice line.
	Name	The salesperson's name as it should appear on documents.
Default Commission Split	Role	<ul> <li>The salesperson's role is specified on the Salesperson form: Three options are available:</li> <li>Salesperson</li> <li>Manager</li> <li><i>empty</i></li> </ul>
	Commission Split %	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.
	Dollar Amount	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.
	Primary	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.

#### **Related Articles**



## **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 <u>Table Toolbar</u>. Upon installing the Advanced Commission Module, the button **Commission Split** is added. The table-specific buttons are listed below.

Button	Description	
	assigned to the the commission the Manager for following colum	<b>mission Split</b> dialog box, which shows the commission split percentage between Salespersons specified Sales Order line. If a salesperson, such as a manager, should receive an override on top of split, enter that salesperson with a 0% commission split. This will allow the line to also be tagged to <sup>c</sup> Commission Calculations but does not interfere with the 100% required commission splits. The ns are included in the installation; however, additional custom fields may be added if needed for culations and conditions.
	Columns	Description
	Salesperson ID	The unique identifier of the salesperson assigned to the Sales Order line.
	Name	The salesperson's name as it should appear on documents.
Commission Split	Role	<ul> <li>The salesperson's role is specified on the Salesperson form: Three options are available:</li> <li>Salesperson</li> <li>Manager</li> <li><i>empty</i></li> </ul>
	Commission Split %	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.
	Dollar Amount	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.
	Primary	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.



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

Button	Description	
	Salespersons as receive an overr This will allow th 100% required o	<b>ult Commission Split</b> dialog box, which shows the commission split percentage between signed to each new detail line added to the Sales Order. If a salesperson, such as a manager, should ride on top of the commission split, enter that salesperson (manager) with a 0% commission split. The line to also be tagged to the Manager for Commission Calculations but does not interfere with the commission splits. The following columns are included in the installation; however, additional ay be added if needed for Commission calculations and conditions.
	Columns	Description
	Salesperson ID	The unique identifier of the salesperson assigned to the Sales Order line.
	Name	The salesperson's name as it should appear on documents.
Default Commission Split	Role	<ul> <li>The salesperson's role is specified on the Salesperson form: Three options are available:</li> <li>Salesperson</li> <li>Manager</li> <li><i>empty</i></li> </ul>
	Commission Split %	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.
	Dollar Amount	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.
	Primary	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.

#### **Related Articles**



## 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 <i>PROTASK</i> segmented key, whose configuration is defined on the <u>Segmented Keys</u> ( <u>CS202000</u> ) form.		
Commissionable	<ul> <li>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)</li> </ul>		

#### **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**

Columns	Description	
	Salespersons as receive an over commission spl Manager for Co commission spl	mission Split dialog box, which shows the commission split percentage between asigned to the specified Project Task. If a salesperson, such as a manager, should ride on top of the commission split, enter that salesperson (manager) with a 0% it. This will allow the transactions related to the Project Task to be tagged to the permission Calculations but does not interfere with the 100% required its. The following columns are included in the installation; however, additional may be added if needed for Commission calculations and conditions.
	Columns	Description
	Salesperson ID	The unique identifier of the salesperson assigned to the Contract Item.
	Name	The salesperson's name as it should appear on documents.
Commission Split	Role	<ul> <li>The salesperson's role is specified on the Salesperson form: Three options are available:</li> <li>Salesperson</li> <li>Manager</li> <li><i>empty</i></li> </ul>
	Commission Split %	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.
	Dollar Amount	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.
	Primary	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.

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



Button	Description	
	between Salesp salesperson, su enter that sales tagged to the N required comm	ault Commission Split dialog box, which shows the commission split percentage bersons assigned to each new detail line added to the Project Task. If a lich as a manager, should receive an override on top of the commission split, sperson (manager) with a 0% commission split. This will allow the line to also be Manager for Commission Calculations but does not interfere with the 100% hission splits. The following columns are included in the installation; however, om fields may be added if needed for Commission calculations and conditions.
	Columns	Description
	Salesperson ID	The unique identifier of the salesperson assigned to the Project Task line.
	Name	The salesperson's name as it should appear on documents.
Default Commission Split	Role	<ul> <li>The salesperson's role is specified on the Salesperson form: Three options are available:</li> <li>Salesperson</li> <li>Manager</li> <li><i>empty</i></li> </ul>
	Commission Split %	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.
	Dollar Amount	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.
	Primary	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.

#### **Related Articles**



# 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 <u>Contract Setup and Activation</u>.

#### **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 <u>Contract Templates (CT202000)</u> form.



#### **Table Toolbar**

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

Button	Description	
	between Salesp manager, shoul (manager) with to the Manager commission spl	mission Split dialog box, which shows the commission split percentage persons assigned to the specified Contract Item. If a salesperson, such as a d receive an override on top of the commission split, enter that salesperson a 0% commission split. This will allow the Contract Item line to also be tagged for Commission Calculations but does not interfere with the 100% required its. The following columns are included in the installation; however, additional hay be added if needed for Commission calculations and conditions.
	Columns	Description
	Salesperson ID	The unique identifier of the salesperson assigned to the Contract Item.
	Name	The salesperson's name as it should appear on documents.
Commission Split	Role	<ul> <li>The salesperson's role is specified on the Salesperson form: Three options are available:</li> <li>Salesperson</li> <li>Manager</li> <li><i>empty</i></li> </ul>
	Commission Split %	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.
	Dollar Amount	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.
	Primary	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.



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

Button	Description	
	between Sales salesperson, su enter that sales tagged to the M required comm	ault Commission Split dialog box, which shows the commission split percentage bersons assigned to each new detail line added to the Contract Item. If a lich as a manager, should receive an override on top of the commission split, sperson (manager) with a 0% commission split. This will allow the line to also be Manager for Commission Calculations but does not interfere with the 100% hission splits. The following columns are included in the installation; however, om fields may be added if needed for Commission calculations and conditions.
	Columns	Description
	Salesperson ID	The unique identifier of the salesperson assigned to the Contract Item line.
	Name	The salesperson's name as it should appear on documents.
Default Commission Split	Role	<ul> <li>The salesperson's role is specified on the Salesperson form: Three options are available:</li> <li>Salesperson</li> <li>Manager</li> <li><i>empty</i></li> </ul>
	Commission Split %	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.
	Dollar Amount	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.
	Primary	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.

#### **Related Articles**



## **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 <u>Commission Configuration and</u> <u>Calculation</u>.

#### 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 <i>SALESPER</i> segmented key. For more information, see <u>Segmented Identifiers</u> .	
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	<ul> <li>The salesperson's role. Three options are available:</li> <li>Salesperson</li> <li>Manager</li> <li><i>empty</i></li> </ul>	

#### 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 <u>Table Toolbar</u>. 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	<ul> <li>Two options are available:</li> <li>Flat Rate: The commission for the Flat Rate Plan is applied one time and is based on a flat commission</li> <li>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.</li> </ul>		
Frequency	Three options are available: • Monthly • Quarterly • Yearly		
Pay Out Type	Two options are available: <ul> <li>Immediate</li> <li>On Paid Invoice</li> </ul>		

#### **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.

Tab	Description			
Salespersons	Opens the <b>Commission Split</b> 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.			
	Columns	Description		
	Salesperson ID	The unique identifier of the salesperson assigned to the Customer Master.		
	Name	The salesperson's name as it should appear on documents.		
	Role	<ul> <li>The salesperson's role specified on the Salesperson form: Three options are available:</li> <li>Salesperson</li> <li>Manager</li> <li><i>empty</i></li> </ul>		
	Commission Split %	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.		
	Primary	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.		

**Related Articles**