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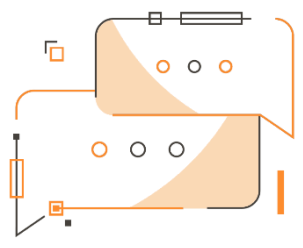
Commissions

Calculate sales commissions in Microsoft Dynamics 365 Business Central

Commissions

App for Microsoft Dynamics 365 Business Central

The Commissions EOS Solutions app allows you to manage and calculate sales commissions for salespersons in Microsoft Dynamics 365 Business Central.
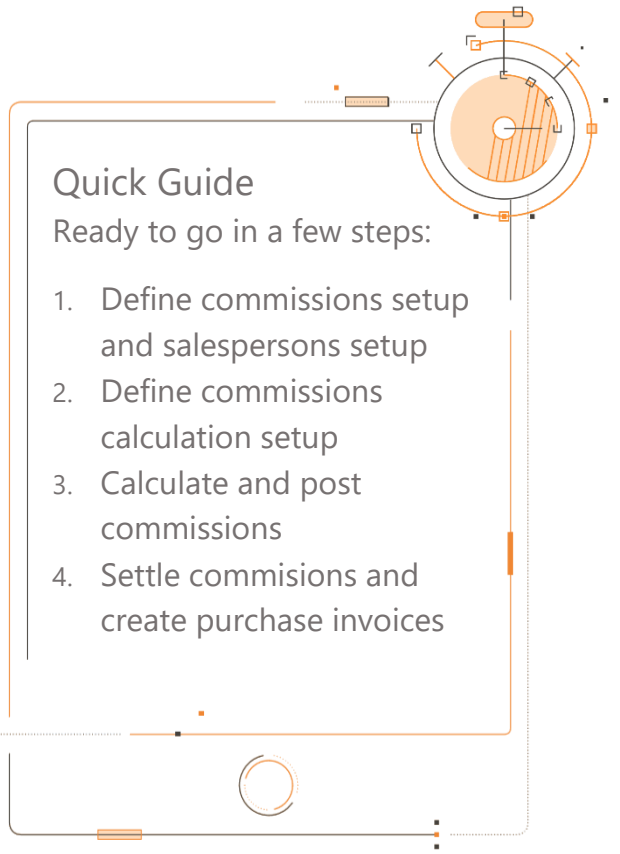
Do you need to calculate commissions for agents in a simple and quick way? Do you want to manage advances and allocations of the commissions? Do you need commissions to be settled directly through purchase invoices?

How it works

Thanks to the Commissions app you can:

- define the basic contractual conditions for each salesperson (advances, settlement period, etc.).

- define salesperson roles and sales networks

- generate commission entries either manually or through sales documents

- manage advances or commission cost allocation

- settle commissions directly through the purchase invoices, or from settlement prospects

Quick Guide
Ready to go in a few steps:

1. Define commissions setup and salespersons setup
2. Define commissions calculation setup
3. Calculate and post commissions
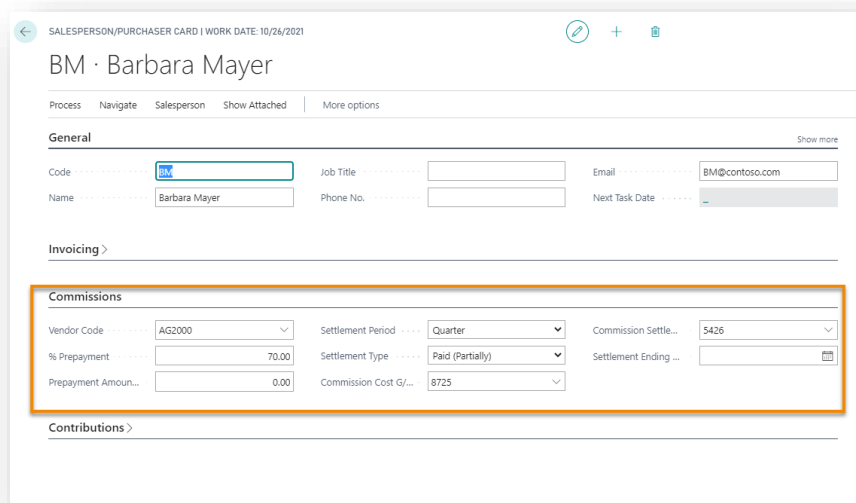4. Settle commisions and create purchase invoices

Commissions - SUMMARY

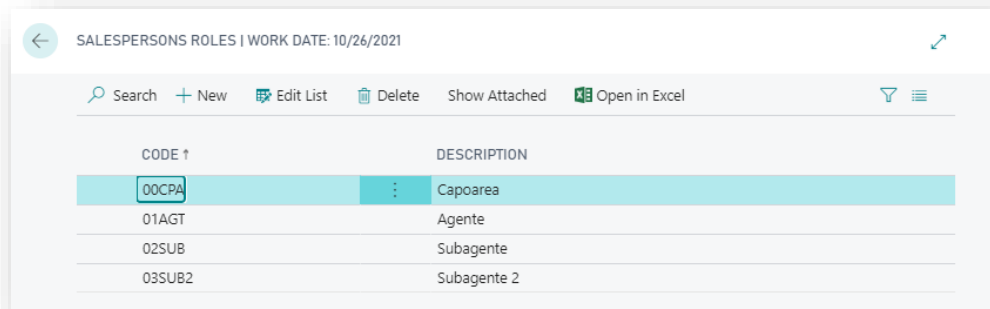Press ALT + Q and digit "CMS" for a summary of the functionalities:
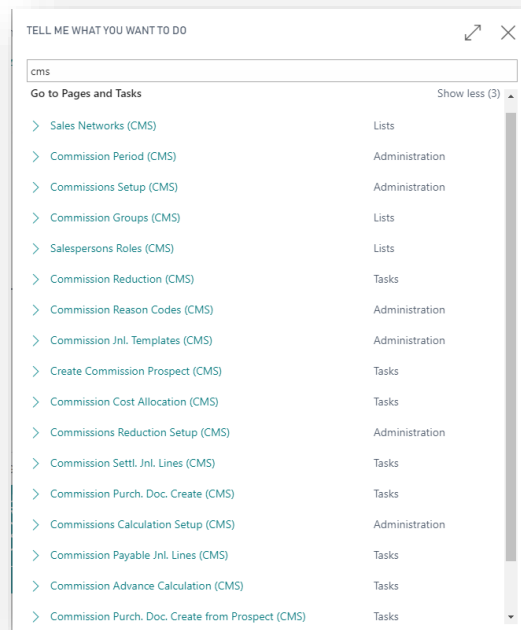
Salespeople / Purchasers Setup

- First you need to set the basic information Salesperson / Purchaser Card:
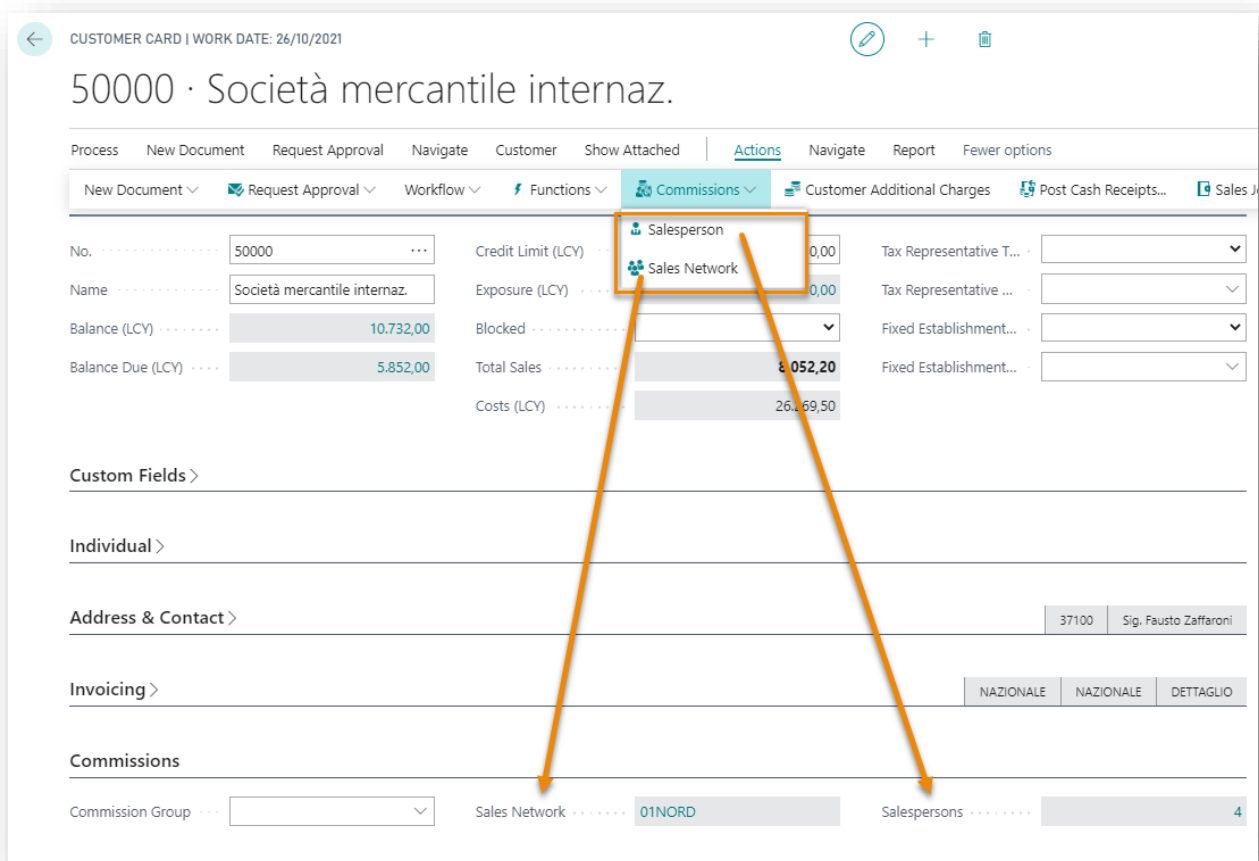
- Enter the salespersons roles in this table:

- enter the sales network

- link commission groups to customers / items:

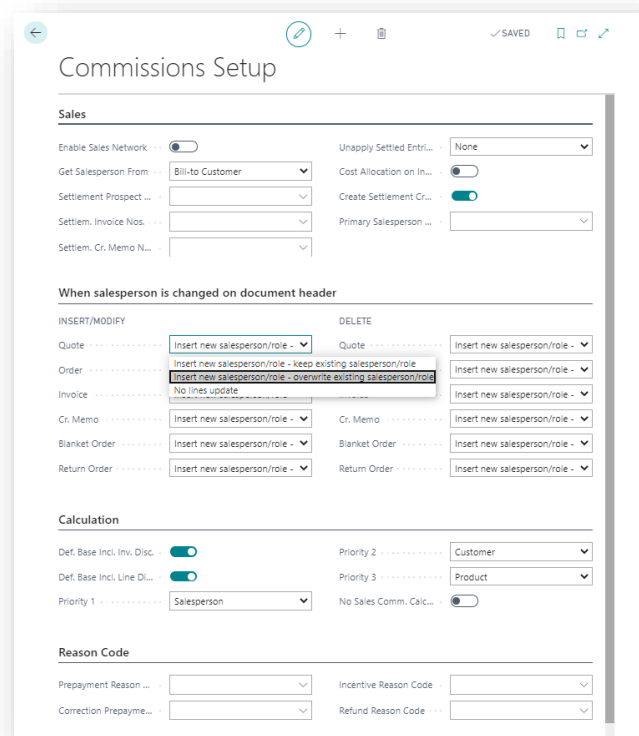- On the customer card you can setup salespersons and sales network:

Commission Calculation Setup

- On the page Commission Reason Codes you can define the reason codes, G/L Account Numbers and VAT Product Posting Groups: Nella page Def. registrazioni provvigioni (CMS) è possibile definire dei giornali di registrazione provvigioni:

- You need to enter the Commissions setup:

In the Commissions Calculation Setup (CMS) you can set up commissions with the following criteria:

- Sales network

- Salesperson role

- Salesperson

- Customer Commission Group

- Customer

- Line type

- Product

- Product Commission Group

- Date

If the line of the sales document is applicable to multiple criteria, the system selects the criterion based on the priorities defined in the Commissions Setup (CMS). The commissions can be calculated for:

- **Percentage**: to be calculated on the base amount (taxable VAT, with or without discounts according to the Commissions Setup (CMS)) for each sales line falling within the setup parameters.

- **Fixed Amount**: commission amount that is assigned to the salesperson for each sales line that falls within the parameter setup. The fixed amount may be defined on the same line of the percentage, the two fields are not mutually exclusive.

- **Threshold**: threshold are defined for the calculation of commission. The threshold are calculated thanks to the Set Threshold button.

At the top we can find all the possible filters:

Through the Set Threshold button it is possible to define the % commission and / or the amount of the threshold associated with the line discount.

Commission ledger entries

It is possible to add manually some data in the commission settlement journal:

- Incentives

- Expenses reimbursement
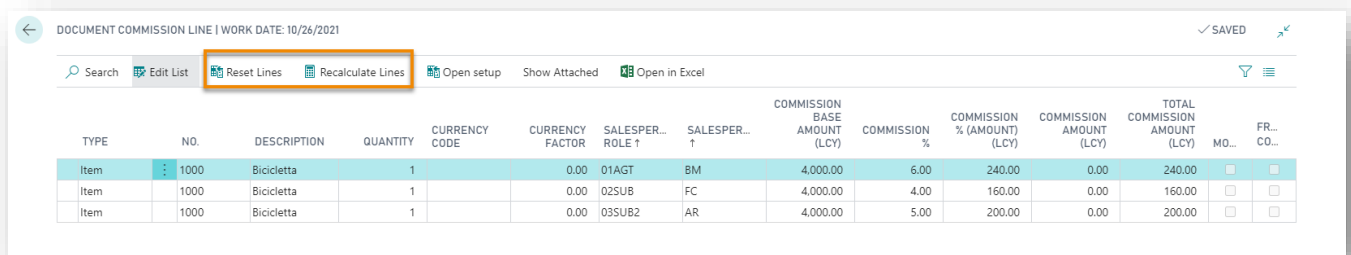
Commission entry posting from sales invoice: on the sales documents (order and invoice) header the system inherits the customer salespersons and then performs the calculation of the commission:

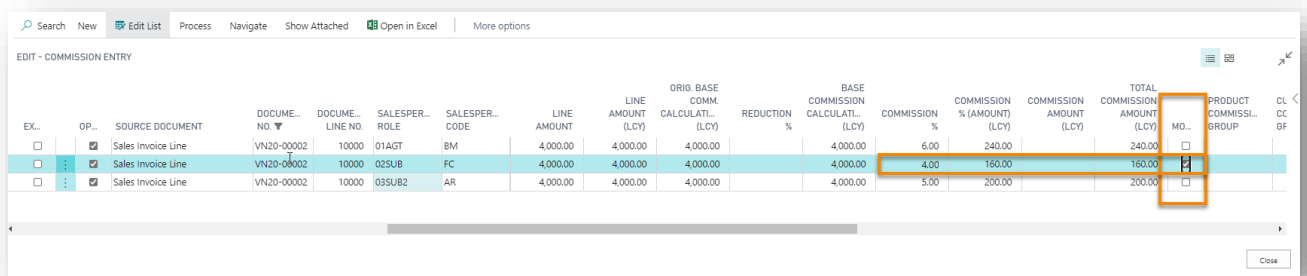From Actions->Commissions->Show Commission you can see the calculation:

Recalculate Lines makes it possible to recalculate according to what defined in setup.
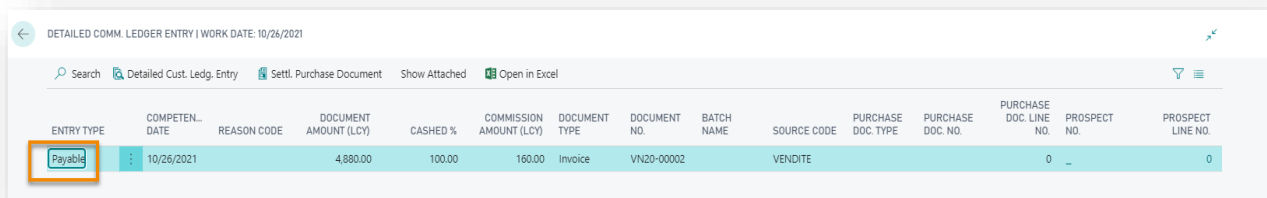
The lines are split for:

- Invoice line

- Salesperson role

On the page Detailed Commission Ledger Entry you can calculate the percentage of cashed, which is shown on page Commission Entry.
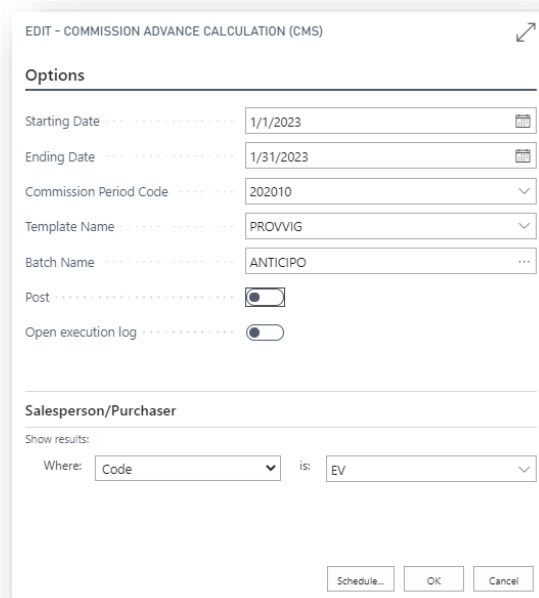
The system will display the line the line with Entry Type "Payable" omly if it is actually to be settled, and therefore in the following situations:

1) If the Salesperson on the Salesperson/Purchaser Card, has Settlement Type=**Invoiced**, the line will be created on posting of the sales invoice;

2) If the Salesperson on the Salesperson/Purchaser Card, has Settlement Type=**Paid (Partially)**, the line will be createdwhen connecting the invoice and payment (even if partial) for each installment of the sales invoice.

3) If the Salesperson on the Salesperson/Purchaser Card, has Settlement Type=**Paid (Totally)**, the line will be created, when connecting the invoice and payment for each installment of the sales invoice.. If the payment is not the total, the field Commission Amount (LCY) field will be zero.

Manage advances and allocations

To calculate the advances you have to launch the report Commission Advance Calculation (CMS):

In the Commission Payable journal are then created the following commission entries to be settled:

On posting, the system will create Commission advances entries.

Commission Purchase Document

To generate the purchase invoices related to commissions it is necessary to run the report Commission Purch. Doc. Create CMS):
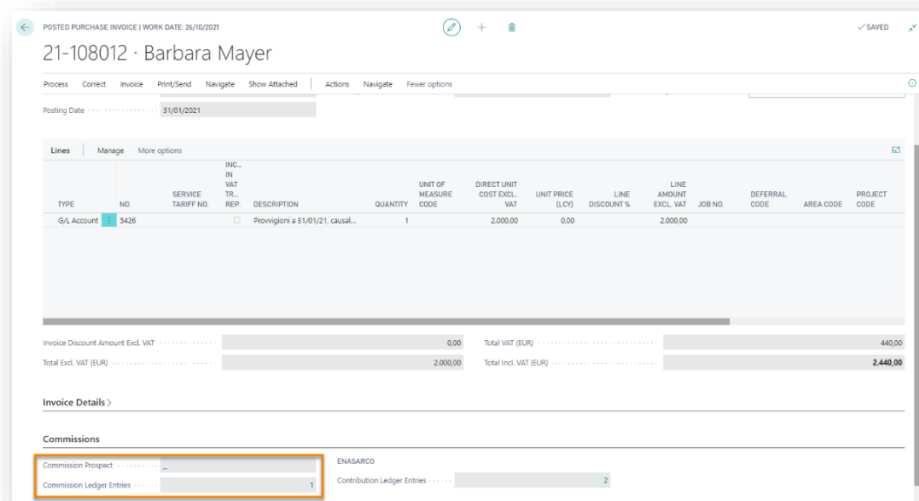

If "Create Purchase Invoice" on Commission reason Codes (CMS) is true the system will create directly purchase documents instead of using settlement prospects.

The commission entries created by sales documents have no reason code, and never will be extracted by this report, but they must be generated through the procedure of the settlement prospects.

Otherwise you can perform the procedure by making a specific commission reason code in order to create an invoice for each commission reason code.

On the page Commission Entry the % cashed is calculated when connecting customer ledger entries, the report populates the field Payable (LCY):

Create Commission Prospect

Launching the report Create Commission Prospects (CMS) you can initiate the creation of purchase invoices for the commission entries created by the sales ocuments or related to reason codes for which the direct creation of the purchase invoice is not planned.
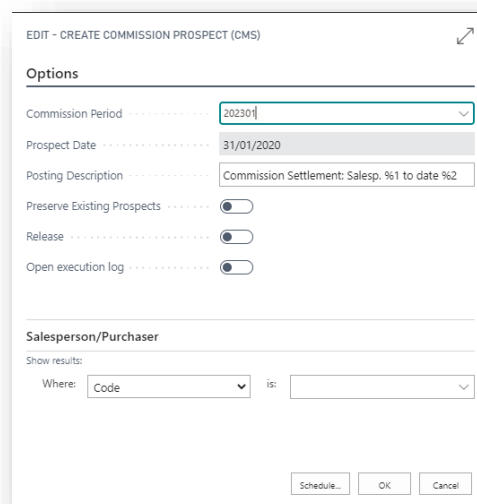
Field	Description
Release	Specifies if created prospects must be automatically released
Preserve Existing Prospects	Specifies if existing settlement prospects have to be saved or regenerated. Released prospect will be not deleted in any case.
Open execution log	Specifies if a summary page with execution log has to be opened at the end of the process.

On page Settlement Prospects you can see the created prospects

You can create purchasing documents through the report Commission Purch. Doc. Create From Prospect (CMS):

The system will create the invoices based on the prospects that have been released.

Subscription

Some features of the Commissions app require a subscription.

The subscription can be activated from Subscription control panel or directly from the notification messages that the system proposes, by clicking on the link that allows you to start the subscription wizard

Contact us for more info:

www.eos-solutions.it/en/contact-support.html