

User Guide

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OVERVIEW

The Commissions Management System (CMS) for Microsoft Dynamics 365 Business Central provides calculation, tracking, and reporting of line-level commissions. It provides several benefits to the user including multiple methods of defining commission rates (including margin), the ability to pay commissions upon partial or full receipt of payment from customers, batch reprinting of paid commissions, and automatic commission adjustment when item costs are adjusted. Salespeople can view the status of their commissions down to the document line level at any time from drillable flow fields on the Salesperson Commission Card or standard Navigate functionality. The benefits you may realize from the proper implementation of CMS are:

- Line Level Commissions: Commissions are calculated and stored per line of each Sales document in the Commission Ledger. This allows line-level accurate results of margin calculations and commissions.
- **Document Level Summary Records:** Commissions are also viewable at a summarized, per-document level for each Salesperson. Drilldowns are provided to view detail information in the Commission Ledger.
- **Multiple Commission Levels:** These provide flexible and varied methods of specifying commission rates. The levels are:
 - Specific Rate defined for a specific combination of Salesperson & Entity.
 - Entity Rate defined for a specific Entity (Items)
 - Group Rate defined for a combination of Customer Discount Group and Item Category Code.
 - Margin Tiered levels of rates defined based on Margin %.
 - Salesperson Percentage defined by Salesperson.
- Multiple Salespeople: Commissions can be split among multiple salespeople. These Salespeople can be defined on the Customer card or Ship-to Address. Salespeople can be changed at the document level as well.

Commissions Paid Upon Receipt of Payments: Commissions are accrued at time of sale, and paid as payments are applied. Partial applications will create partial commission payments.

- Salesperson Commissions Form: This form displays current commission information in drillable fields. In addition, separate tabs are provided for defining Specific Level commissions for this Salesperson by Item, Resource, G/L Account, or Fixed Asset.
- Salesperson Commissions Statistics Form: A quick summary screen displaying commission information for the current month, current year, last year, and to date.
- **Batch Commission Reporting:** Commissions are paid by running a "Process Payable Commissions" report. This report marks each payable commission with a batch number, allowing the report to be reprinted at any time.
- **Commissions Due Summary Report:** A report that shows the commissions each Salesperson has accrued at a document level, breaking down total commissions, commissions awaiting Customer payment, and commissions currently payable.
- **Manual Override:** A full interface is provided for specifying commissions manually by document line. This allows temporary overrides of calculated rates.
- Item Cost Commission Adjustments: Commissions are revised as item costs are adjusted. This allows commissions based on true cost, rather than the best cost known at time of sale.
- **User-level Security:** Allows user-specific security at the record level. Salespeople can only see their own commission records and rates. Only Commissions Supervisors can edit commissions.
- Commission Journal: This Journal allows manual entry and posting of commission adjustments.

Flexible Setup Options: Allows tuning the CMS to the needs of each business. Setup options include:
Enable or disable individual Commission Levels
Base commissions on total sales or total profits
Two different methods of calculating margin %
Enable or disable Item Cost Commission Adjustments
Enable or disable partial commission payments

COMMISSION SETUP

The Commissions Setup is accessed by searching for Commissions Setup.

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	Go to Pages and Tasks			
	> Commissions Setup	Administration		

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This will bring up the Commissions Setup window. Notice there are three Fast tabs, General, Defaults and Margin Levels. Detailed explanations of the setup options for Enable CMS, commission Base Type, Margin % Type, commission Rounding Precision, Enforce Base total of 100%, etc. These setups are all covered in the CMS user setup manual. Please refer to the setup manual for questions or concerns.

User Note: A detailed explanation of setup options and instruction occurs in the Setup Manual and won't be addressed in this manual.

COMMISSION LEVELS

CMS is designed to handle a multitude of ways to calculate salesperson commissions to provide you with the maximum amount of flexibility in determining your commission pay plans. Commissions are generated from each line on a sales document (Quote, Order, Invoice or Credit Memo), which allows multiple commission calculations per document.

CMS is designed to check five levels of commission specifications to determine the correct commission calculation. Once CMS finds a match between the sales line item and the commission criteria, it will calculate the appropriate commission and create a Commission Ledger Entry. This entry can be viewed from the sales document before it is posted.

Upon posting of the document, the Commission Ledger Entry which will be used to calculate, among other things, total commissions available, commissions currently payable to the salesperson and commissions already paid. We will discuss Commission Ledger Entries in detail as we move through this document, but for now let's review the five commission levels and how CMS calculates commissions.

LEVEL I - SPECIFIC

This level is used for assigning commission percentages for specific combinations of Salesperson & Item. You can set up an unlimited number of combinations per salesperson. In addition, Level I – Specific takes precedence over all other commission levels in CMS.

To bring up the Salesperson Commission Card you must first click the Salespeople/Purchasers link on the Commissions page. This will bring up the Salesperson/Purchaser Card. In the Process Actions Group on the Action Pane choose the commission's button.

There are three Fast Tabs on the Salesperson Commissions card labeled General, Commissions Due, and Item. These tabs are where setup for Level I – Specification is done.

SALESPERSON COMMISSIONS				🧭 + 🗈				
AH Annette I	Hill							
Process Navigate	Less options							,
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Code			AH					
Name			Ann	ette Hill				
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Paid					0.00			0.00
Outstanding			COMMISSIONS		0.00	BASE		0.00
Due					0.00			0.00
Possible					0.00			0.00
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Let's review how the Level I - Specific Criteria commission calculation works by looking at the Salesperson Commission card for Annette Hill. In this screen shot, the Item Specific Commissions Fast Tab of Annette Hill's Salesperson Commission Card is opened and has commission criteria established for Item 1896-S. First, if Annette sells Item 1896-S, CMS is going to use 2.20% to calculate her commissions. However, if she sells to Customer 10000 she will receive 3.20%. If the sale occurs from September 1st to December 31st 2017 she will earn 3.65%. Lastly, if she sells an item with an item category of MISC she will earn 2.30 %.

Level I – Specific commissions are to be used for special situations, exceptions to the overall commission calculation process pertaining to a specific salesperson. For example, a company normally uses tiered profit margins as the base for their commission payments. However, on occasion they work special deals with their salespeople where they pay them a flat commission for specific resources and items sold on a specific job. You would set each exception up on the Salesperson's Commission Card.

Security Note: If a user does not have the permission set SIKICH CMS ADMIN they will not be able to enter information on their own Item tab for specific criteria. They will, however, be able to view any specific criteria that have been set up for them.

LEVEL II - ENTITY

The Entity level commission is a global setting that can be used to calculate the commission for the Item. Setup of the Entity Level commission is done on the Commissions tab of the Item card. Entity commissions are accomplished by assigning a commission percentage for that entity, i.e. if you want to pay 3% commission for every widget you sell, you would set the commission percentage on the Widget Item card to 3%.

CMS first checks the Salesperson Commissions Card to see if there is a Level I – Specific commission combination that matches the information on the sales line. If no commission rate is found, the system will look for a Level II – Entity commission percentage to calculate commissions.

In the previous example for a Level I – Specific Commission, we outlined what happens when a Specific Commission is set up for the combination of an Item and a Salesperson. What happens when there is no such combination? The commission would calculate using the Level II – Entity commission recorded on the Item Card. Let's look at our Moscow Swivel Chair. Here we see that the Entity commission for Item No. 1980-S is 3%. If there is no Level I – Specific commission, the Salesperson will receive a 3% commission entry in the Commission Ledger.

User Note:

The Commissionable check box field on an entity card must be checked before any commissions will be calculated. Regardless of any commission percentages or commission levels established, if this check box is not marked, zero commissions will be calculated.

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LEVEL (III) - GROUP

This level calculates a commission based on the values in a combination of fields. To access group commissions, search for and click on the Commission Groups link. Commission Groups allow you to connect a commission to a specific combination of Customer Discount Group and Item Category Code. In the example shown below a commission of 30% is available to any commissionable sales person that sells a commissionable item with an Item Category Code value of FURNITURE to a Customer with a Customer Discount Group value of RETAIL. In the first commission group below a 20% commission is available for sales persons who sell the services to any Customer with a Customer Discount Group of Retail and Item Category of Misc. Item Category can be left blank if desired, this would then apply to all items.

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		RETAIL			N	lisc					20.00		
		SMALL A	ICC								15.00		

LEVEL (IV) - MARGIN

This level calculates commissions based upon the margin of the entity(s) sold. You have two options of margin calculations to choose from – Profit/Cost and Profit/Price. Both options are discussed in detail in the <u>Setup</u> <u>Manual</u>. In addition, CMS will allow you to create tiered levels of margin commission percentages. These margin percentages are global settings.

The system will first look for Level I – Specific criteria on the Salesperson Commission Card, if it finds nothing that matches the components on the sales line, it will look for Level II – Entity criteria, which is entered on the Item Card. If CMS finds no matches, it will then move to Level III – Groups. If CMS finds no matches for commission groups, it will move to Level IV – Margins. Margin Commission percentages are entered under the Commission Setup screen, within the Margin Levels Fast Tab.

In this next screen shot, we see a portion of the Margin Levels tab from the Commissions Setup Card. Sales Lines with a margin below 15% have zero commissions calculated. Sales Lines with margin percentages from 15% to 19.99% calculate commissions at 15%. And Sales Lines with margins 20% to 29.99% calculate a 20% commission. A sales line with margins of 30% to 34.99% calculates a 30% commission. In this example Commissions are configured up to 40%.

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4	20.00			20.00	
5	30.00			30.00	
	40.00			40.00	

User Note:

It is possible to encounter negative profit margins. CMS handles this situation by creating negative commission ledger entries according to the margin percentages established on the Margin Levels Tab. This creates a "charge back" or a commission credit to the salesperson.

LEVEL (V) - SALESPERSON

The fifth level of commissions is the Salesperson level. If no other commission criteria have been found to match the components on the sales line, the system will look to the Commission % field on the Salesperson/Purchasers screen to determine what percentage to use to calculate the commission. If this percentage is zero, then a zero will be filled into the Amount field on the Commission Ledger Entry Line. Note, however, that a Commission Ledger Entry line will still be generated so you can track "House" account activity or sales for Salespeople who are paid by salary. To activate a Salesperson commission, open the Salespersons list page.

Next, click on the Sales person of choice to bring up the Salesperson/Purchaser Card in this case Annette Hill. Three Fast Tabs, General, Invoicing and Payments are found on the screen.

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	CODE		NAME			COMMISSI			COMMISS	ION %		
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	DC		Debra L. Co	re		\checkmark				0.00		
	JR		John Rober	ts		\checkmark				5.00		
	MD		Mary A. Der	mpsey						5.00		
	PS		Peter Saddo	w		\checkmark				5.00		
	RL		Richard Lun	n		\checkmark				0.00		

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	Name		Annette Hill		Phone No)					
	Job Title				Email		AH@contoso.com	n			
	Commissionable				Next Tasl	Date	-				

Choosing the Commissions option located in the Navigate Actions Group on the Action Pane will bring you to the Salesperson Commissions screen shown below. Notice, this screen is the same one that is used to setup a specific commission documented above.

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Notice the General Fast Tab contains a Commissionable Checkbox which must be checked to allow the Salesperson to receive a commission. In this case 5.50%.

USE CASE SAMPLE: SALES ORDER

SETUP ITEM COMMISSIONS

We will now setup several entities as commissionable, then create an order with those items and examine each commission. The Cronus database will be used.

The entities and their respective commissions are in the following table;

Entity Type	No	Description	Entity Commission %
Item	1900-S	PARIS Guest Chair, black	0%
Item	1906-S	ATHENS Mobile Pedestal	0%

Note: These entities have a 0% commission rate, but this does not mean that a salesperson will not receive a commission. It is very likely that one of the commission types, will pay a commission.

Following are actual screen shots of the Entities listed in the table above. Notice that each entity has the commissionable option check marked. This means the entities can generate a commission under the right conditions.

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	1900-S	· PARI	S Gu	iest Chair, b	lack								
	Process Item	History	Special	Sales Pces & Discounts	Request Ap	proval	Actions	Navig	ate		0	×	
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	Inventory>										0	l	
	Costs & Posting	j >					150.30	RETAIL	FURN	ITURE	RESALE	l	
	Prices & Sales >										192.80	l	
	Replenishment	>									Purchase	l	>
	Planning >										None	l	
	Item Tracking >											l	
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	Commissions												
	Commissionable	••••••	D		Commission	n Percentage					0.00	1	

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	1906-S · ATHENS Mobile Pedestal		
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	Item>	PCS	
	Inventory	5	
	Costs & Posting > 338.20 RETAIL PURNITURE	RESALE	
	Prices & Sales >	433.60	
0	Replenishment >	Purchase	0
	Planning >	None	
	Item Tracking >	_	
	Warehouse >		
	Commissions		
	Commissionable Commission Percentage	0.00	

Now most importantly we must check the commission setup screen to know what kind of commissions we should expect. In the current setup all five types of commissions, Specific, Entity, Group, Margin and Salesperson are enabled. Margin % Type has a value of "Margin", meaning the profit percentage will be calculated by dividing the actual profit by the actual cost of the line item(Profit/Cost). In addition, please note the various commission percentages for Margin commissions based on margin percentages.

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Com	mission Rounding Preci		0.01	Group Com	missions							
Syste	em GUID	{3e79322d-9c	:23-4511-b778-c556112d8	Margin Con	nmissions							
Trial	Active Through	11/28/2018		Salesperson	Commissions							
Live /	Active Through			Enforce Base	e Total of 100%							
Licen	ise Key			Commission	ns Payable Upon							
				Pay Partial C	Commissions							
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				Commission	n Item Cost Adj.							

SETUP MULTIPLE SALESPEOPLE ON CUSTOMER

The salesperson that will earn commission for sales to a customer is setup on the customer card by entering the salesperson code on the card. Multiple salespeople can earn commissions by entering records in Salesperson Base Percent.

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Commissions >	Salesperson Base Percent	Occument Document Total Sales	Sending Profile				78,771.10	
Document Layouts		0.00 Costs (\$)					40,255.70	
Credit Limit (\$)		0.00 Profit (\$)					20,417.10	
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Privacy Blocked		CFDI Purpo	se				\sim	
Salesperson Code	PS	✓ CFDI Relation	on ·····				\sim]

In this example the commission for Otwo salespeople, Annette Hill and Peter Saddow, will each be based on 50% of orders for the customer.

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		No									``			
		Name									`			
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		Balance (\$)						[Close		78,771.1	0		
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		Blocked				~ P	rofit %				33.	7		
		Privacy Blocked				C	FDI Purpose				`			
		Salesperson Code		PS		~ C	FDI Relation				`			
		Salesperson Base Co	ount			2 L	ast Date Modified		/1/2018					

CREATE SALES ORDER

Create an order for customer 10000, Adatum Corporation to purchase the Items listed above.

Here is the order below:

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	Process Repor	t Posting	Request Approval Ac	tions Navig	ate Repor	rt Less optio	ons		ہ 0
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ORD1010	Customer Name	Ada	tum Corporation	~	Requested Deliv	very Date			ţ
DRD1010	Contact	Rob	ert Townes		External Docum	ent No.			
ORD1010	Posting Date	10/3	30/2018	Ē	Salesperson Bas	e Count			2
ORD1010	Order Date	10/3	30/2018	Ē	Order Type				\sim
JRD1010									
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00000000000000000000000000000000000000	Due Date · · · · · · · · · · · · · · · · · · ·	age More option NO. 1900-S	30/2018 ons DESCRIPTION PARIS Guest Chair, black	QUANTITY 5	UNIT OF MEASURE CODE PCS	UNIT PRICE EXCL. TAX 192.80	TAX GROUP CODE FURNITURE	LINE DISCOUNT%	LINE AMOUNT EXCL. TAX 964.00
ORD1010	Lines Mana TYPE Item Item	age More option NO. 1900-S 1906-S	0/2018 DESCRIPTION PARIS Guest Chair, black ATHENS Mobile Pedestal	QUANTITY 5 5	UNIT OF MEASURE CODE PCS PCS	UNIT PRICE EXCL. TAX 192.80 433.60	TAX GROUP CODE FURNITURE FURNITURE	LINE DISCOUNT%	LINE AMOUNT EXCL.TAX 964.00 2.168.00
010	Lines Mana TYPE Item	More option NO. 1900-S 1906-S	00/2018 DESCRIPTION PARIS Guest Chair, black ATHENS Mobile Pedestal	CUANTITY 5 5	UNIT OF MEASURE CODE PCS PCS	UNIT PRICE EXCL.TAX 192.80 433.60	TAX GROUP CODE FURNITURE FURNITURE	LINE DISCOUNT%	LINE AMOUNT EXCL.TAX 964.00 2.168.00
ORD1010	Lines Mana TYPE Item Item	age More option NO. 1900-S 1906-S	30/2018 Ons DESCRIPTION PARIS Guest Chair, black ATHENS Mobile Pedestal	CUANTITY 5 5	UNIT OF MEASURE CODE PCS PCS	UNIT PRICE EXCL.TAX 192.80 433.60	TAX GROUP CODE FURNITURE FURNITURE	LINE DISCOUNT %	LINE AMOUNT EXCL.TAX 964.00 2.168.00
010.	Lines Mana TYPE Item Item	More option NO. 11/2 NO. 1900-S 1906-S 1906-S 1906-S 1906-S	30/2018 ons DESCRIPTION PARIS Guest Chair, black ATHENS Mobile Pedestal	CUANTITY 3.132.00	UNIT OF MEASURE CODE PCS PCS Total Excl. Tax (t	UNIT PRICE EXCL.TAX 192.80 433.60 JSD)	TAX GROUP CODE FURNITURE FURNITURE	LINE DISCOUNT%	LINE AMOUNT EXCL.TAX 964.00 2.168.00
ORD1010	Lines Mana TYPE Item Item Construction Const	II/2 age More option NO. Image: Imag	30/2018 ONS DESCRIPTION PARIS Guest Chair, black ATHENS Mobile Pedestal	CUANTITY 3,132.00 0.00	UNIT OF MEASURE CODE PCS PCS Total Excl. Tax (U Total Tax (USD)	UNIT PRICE EXCL.TAX 192.80 433.60 JSD)	TAX GROUP CODE FURNITURE FURNITURE	LINE DISCOUNT%	LINE AMOUNT EXCL.TAX 964.00 2.168.00 3.132.00 187.92

DOCUMENT COMMISSIONS

Now to check for any possible commissions on the order, go to Navigate -> Order -> Commissions -> Document Commissions.

Dynamics 365	Business Central	Sales Orders > S-ORD101008 · Adatum Corporati	ion	Environment V	8 © E
	SALES ORDER) + 🛍		
Sales Orders	S-ORD10100	8 · Adatum Corpora	ntion		
NO.	Process Report Posti	ng Request Approval Actions	Navigate Report Less option	IS	یر آن ا
S-ORD1010	Order V Documen	ts 🗸 📼 Warehouse 🗸 🛤 Prepayment	✓ History ✓		
S-ORD1010	Customer	Adatum Corporation	Requested Delivery Date		
S-ORD1010	Dimensions	Pobert Towner	· External Document No.		
S-ORD1010	😵 Commissions 💦 🤌	Document Commission	Salasparsan Pasa Count		2
S-ORD1010	🛡 Comments 🔮	Salesperson Base Percent	salesperson base count		
S-ORD1010	Assembly Orders		Order Type		
S-ORD1010		11/30/2018			_

The Document Commissions shows all line items and qualifying commissions that are due to the salesperson. On the screen we Sales person Annette Hill & Peter Saddow will receive several commissions. They will receive the following commissions:

- Annette will receive Specific commission of 3.2% for Item 1900-S in the amount of \$15.42
- Annette will receive Specific commission of 3.2% for Item 1906-S in the amount of \$34.69
- Peter does not have any specific commissions found so he will receive a margin commission for both Items 1900-S and 1906-S in the amount of \$96.40 and \$216.80

D	Oynamics 365 🗸	Business Cent	tral Salespers	ons ≻ AH · Annette	e Hill 🔀 AH Annette	Hill Sandbox	ť	~ Q	\odot	Ê	٢	?
\leftarrow	- SALESPERSON COM	IMISSIONS		(
	AH Anr	nette Hill										
	Process	Navigate Less	options								ہ لا	
	General >											
	Commissions D)ue >										
	Commissions E	Due >	Manage									
	Commissions E Item Specific Con EFFECTIVE DATE	nmissions	Manage CUSTOMER NO.	JOB NO.	ITEM CATEGORY CODE	NO.	COMMISSION PERCENTAGE	ENTITY DES	SCRIPTIO	DN		
	Commissions E Item Specific Con EFFECTIVE DATE	nmissions ENDING DATE	Manage CUSTOMER NO.	JOB NO.	ITEM CATEGORY CODE MISC	NO.	COMMISSION PERCENTAGE 2.30	ENTITY DES	SCRIPTIO	DN		
	Commissions D Item Specific Con EFFECTIVE DATE	mmissions ENDING DATE	Manage CUSTOMER NO.	JOB NO.	ITEM CATEGORY CODE MISC	NO. 1896-S	COMMISSION PERCENTAGE 2.30 2.20	ENTITY DES Non Entity- ATHENS De	SCRIPTIO -Specific esk	DN		
	Commissions E Item Specific Con EFFECTIVE DATE	Pue > mmissions ENDING DATE	Manage CUSTOMER NO. 100000	JOB NO.	ITEM CATEGORY CODE MISC	NO. 1896-S	COMMISSION PERCENTAGE 2.30 2.20 3.20	ENTITY DES Non Entity- ATHENS De Non Entity-	SCRIPTIO -Specific esk -Specific	DN		

Note that if a salesperson is to receive 0% commission for any item the Document Commission will display that zero commission will be earned. It is important to understand why each commission was chosen. Remember the Commission Setup screen showing the commission types 1 thru 5? Each line item on this order is checked to see if it qualifies for any commissions starting with type 1 and continuing to type 5 if they are enabled with a check mark. Let's analyze each commission shown below.

Dyn	amics 365	~	Business Ce	entral	Sales Orders > S	-ORD101008 · Adatum Corpor	ation > Order S-	ORD101008		En Sa	vironment Indbox	~	9 ©	U)
Help		DOCUM	ENTCOMMISSIO	INS			\oslash	+ 🗊						
CR Sale		Ord	der S-	ORD	101008									
														7 ⁴
NO		docun	nentcommis	sion										-
S-(Docume	nt Type		Order			Commission B	ase				3,132.00	5
5-0		No.			S-ORD101	008		Commission A	Amount				363.31	
S-(Sell-to C	ustomer No.		10000			Avg. Commiss	sion % · · · · · ·				11.60	b
S-(Sell-to C	ustomer Name		Adatum Co	orporation								
S-(
S-C		Lines	Mana	age										
5-0		SA CO	LESPER DE	TYPE	NO.	DESCRIPTION	MARGIN PERCENTAGE	BASE PERCENTAGE	COMMISSION PERCENTAGE	COMMISSION PERCENTAGE TOTAL	BASE AMOUNT	COMMISSION AMOUNT	COMMIS LEVEL	
		AH		Item	1900-S	PARIS Guest Chair, black	28.28	50.00	3.20	1.60	482.00	15.42	I. Specific	
		PS		Item	1900-S	PARIS Guest Chair, black	28.28	50.00	20.00	10.00	482.00	96.40	IV. Margin	
		AH		Item	1906-S	ATHENS Mobile Pedestal	28.21	50.00	3.20	1.60	1,084.00	34.69	I. Specific	
		PS		Item	1906-S	ATHENS Mobile Pedestal	28.21	50.00	20.00	10.00	1,084.00	216.80	IV. Margin	

Туре	No.	Description	1-Specific	2 - Entity	3 -Group	4- Margin	5- Salesperson
Item	1900-S	PARIS Guest Chair, black	AH- Specific 3.2%	0%	None found	PS- Margin is 28.28%, setup shows 20% AH – specific commission found first	Would pay 5.5% but Margin commission found first
Item	1906-S	ATHENS Mobile Pedestal	AH- Specific 3.2%.	0%	None found	PS- Margin is 28.21% setup shows 20% AH – specific commission found first	AH-0% PS- 5%

Here is a table that will show each commission type and each line item

REPORT - COMMISSIONS DUE DETAIL

In addition to seeing the commissions on the order, you can request a report that will show all commissions due to a salesperson. The order must be posted before the commissions due will display on the report. After Posting the order, search for Commissions Due Detail.

Search for Commissions Due Detail and the report filter window will display. To see the report for the salespersons on our example order enter the Sales Person code for Annette Hill & Peter Saddow (AH|PS) into the Filter. Also, slide the option to Show Line Detail.

 Dynamics 36	5 ~	Business Central	Environmer Sandbox	t	~	Ŷ	٢	¢
CRONUS U	EDIT - CO	MISSIONS DUE DETAIL						2
Customers	Saved S	ettings						^
HEADLINE	Changes t filters'	o the options and filters	below will	be save	d only to: 'Last us	ed options	and	
Wan	Use defau	It values from:	Last	ised op	tions and filters			~
Busir	Options	;						
0.0	New Page	Per Salesperson)				
ACTIONS	Show Cus	omer Totals)				
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+ Sales Orde	Show Line	Detail)				
Activities	Percent Ty	pe · · · · · · · · · · · · · · · · · · ·	Total					~
Activities ∨ SALES THIS MO								
t 2 12	Commi	ssion Document	Summa	ry				
\$3,13	Show result	s:						_
See more	Where:	Salesperson Code	~	is:	AHJPS			~
7 see more	And:	Posting Date	~	is:				
SALES INVOICE OVERDUE	And:	Customer No.	~	is:				~ ,
0				Send to	Print	Preview	Car	icel

The report will be produced as shown below, notice it shows Commissions Outstanding in amounts that were shown on the Commissions screen associated with the order.

 Dynamics 365 🗸	Busine	ss Cer	ntral	Environment Sandbox		~	Q	\odot	Ē	٥	?	8
Commissions Due Detail CRONUS USA, Inc. Filters: Salesperson Code: AHIPS	, Open: Yes									10/30/20 Page	18 3:48 PM 1 ADMIN	×
Po <u>Type Document No. Da</u> Salesperson Code AH	sting te Entity T Annette I	Entity ypeNo. Hill	Description	Total Base Amount	Commission Percentage Total	Amount	Amount Paid	Comm. Outstand.	Comm. Due	Comm. Possible	Period Comm.	
Invoice: PS-INV103215 10/ Line No. 10,000	30/2018 Order S-I	DRD101008 1900-S	PARIS Guest Chair, black	964.00	1.6	15.42		15.42		15.42		
Line No. 20,000	ltem	1906-S	ATHENS Mobile Pedestal Total For: Invoice PS-INV103215	2,168.00	1.6	34.69 50.11	0.00	34.69 50.11	0.00	34.69		
			Total for Salesperson Code AH	3,132.00		50.11	0.00	50.11	0.00	50.11		
Salesperson Code PS	Peter Sa	dow										
Line No. 10,000	ltem	1900-S	PARIS Guest Chair, black	964.00	10	96.40		96.40		96.40		
Line No. 20,000	Item	1906-S	ATHENS Mobile Pedestal	2,168.00	10	216.80		216.80		216.80		
			Total For: Invoice PS-INV103215	3,132.00	-	313.20	0.00	313.20	0.00	313.20		
			Total for Salesperson Code PS	3,132.00	-	313.20	0.00	313.20	0.00	313.20		
		Report	Total	8,284.00	-	383.31	0.00	383.31	0.00	383.31		

SETUP DATA

Create an order that will have a group (type III) commission associated with it.

We will start with the item that will be sold, 1908-S LONDON Swivel Chair. Notice from the screen print below that it has an Item Category Code value of CHAIR. Also notice Customer Card for Recloud which has a Customer Discount Group value of RETAIL.

namics 365 🗸 🛛 B	usiness Central	N Swivel Chair, blue	Environment Sandbox	~ Q ©	¢	? 8
ITEM CARD			+ 🛍			~
1908-S · L	ONDO	V Swivel	Chair, blue			
Process Item	History Specia	l Sales Pces & Disc	ounts Request Approval		() ₇ "	
ltem					Show less	
No	1908-S		Last Date Modified 10	/1/2018	- 1	
Description	LONDON Swivel	Chair, blue	GTIN			
Blocked			Item Category Code	IAIR	\sim	
Туре	Inventory	\sim	Service Item Group		~	
Base Unit of Measure	PCS	\sim	Automatic Ext. Text	\supset		
namics 365 v	Business Centra	50000 · Relector	d Sandbox	~ Q @) 🖻	⊕ ?
CUSTOMER CARD			+ 🖻			
50000 · F	Releclou	d				
Dragona New Da	eument Desu	ast Assessed	A-tions	Navianta		×
Process New Do	cument kequ	est Approvai Ci	astomer Actions	Navigate		^
General >					Relectoud	
Address & Contac	t>		31772 Jes	se Homer jesse.home	er@contoso.com	
Invoicing					Show less	
Customer		\sim	POSTING DETAILS			
Tax Registration No.			Gen. Bus. Posting Group	DOMESTIC	\sim	
GLN			Customer Posting Group	DOMESTIC	\sim	
Copy Sell-to Addr. to	Company	\sim	PRICES AND DISCOUNTS			
Tax Liable			Currency Code		\sim	
Tax Area Code	ATLANTA, GA	\sim	Customer Price Group		\sim	
Tax Identification Type	Legal Entity	~	Customer Disc. Group	RETAIL	\sim	
Tax Exemption No.			Allow Line Disc.			
			Invester Dire Carle			
Invoice Copies		0	Invoice Disc. Code	50000	\checkmark	
	ITEM CARD ITEM CARD 1908-S Process Item No. Description Blocked Type Blocked Type Base Unit of Measure CUSTOMER CARD 500000 Frocess New Doc General > Address & Contact Invoicing Customer Tax Registration No. GLN Copy Sell-to Addr. to Tax Identification Type Tax Identification No.	Business Central ITEM CARD 1908-S · LONDON Process Item No. 1908-S Description LONDON Swivel G Blocked Immediate Type Inventory Base Unit of Measure PCS CUSTOMER CARD Business Central SOOOOO · Relectoru Process Process New Document Require General > Address & Contact > Invoicing Customer Copy Sell-to Addr. to Company Tax Area Code ATLANTA, GA Tax Identification Type Legal Entity Tax Exemption No. Imaged Entity	namics 365 × Business Central V Swivel Chair, blue ITEM CARD Image: Control of Measure Image: Control of Measure Process Item History Special Sales Pces & Disc Item Image: Control of Measure Image: Control of Measure Image: Control of Measure Process New Document Request Approval Control of Con	namics 365 v Business Central Vswivel Chair, blue Endoted ITEM CARD 1908-S · LONDON Swivel Chair, blue Process Item No. 1908-S Description IONDON Swivel Chair, blue Blocked Type Inventory Base Unit of Measure PCS Customer CARD Soudoox · Relectoud Address & Contact > Address & Contact > Customer Customer Customer Customer Customer General > Customer Customer Customer Customer Customer Customer Customer <td>namics 365 Business Central Vowel Chair. Julie V ITEM CARD Image: Comparison of the second of the secon</td> <td>namics 365 Business Central Sword Quick Male IPEM CARD Image: Control Contro</td>	namics 365 Business Central Vowel Chair. Julie V ITEM CARD Image: Comparison of the second of the secon	namics 365 Business Central Sword Quick Male IPEM CARD Image: Control Contro

Notice that the Commission Groups screen has an entry to pay a commission of 30% for an order that has a product with an Item Category Code of CHAIR being sold to a customer with a Customer Discount Group of RETAIL.

	Dyna	amics 365 🗸	Busines	s Central	Commission	Groups	Environment Sandbox	Ŷ	٢	Ē	٢	?
×	\leftarrow											
		Commi	ssion	Grou	ps							
		✓ Search	+ New	🐯 Edit List	🗙 Del	ete	🛯 Open in Excel			1	≣ ,≯ [⊄]	
		CUSTOM	ER DISC. GROU	JP		ITEM CA	TEGORY CODE	COMM	/ISSI0N	PERCEN	TAGE	
		LARGE AG	cc	\sim	:	FURNITU	JRE				25.00	
		LARGE AG	CC			MISC					35.00	
		RETAIL				CHAIR					30.00	
		RETAIL				FURNITU	JRE				30.00	
		RETAIL				MISC					20.00	
		SMALL A	cc								15.00	

CREATE ORDER

Now, create an order will be created using the customer Relectoud (50000) and the product LONDON Swivel Chair (1908-S) listed above.

Dynamics 365	 Business Centra 	S-ORD101	1009 · Relecloud				Environment Sandbox		~ Q	o e	
	customer has an overdue bala	nce. Show det	tails								~
Cust ←				-	- 🗊						
HEA	S-ORD1010	09 · Re	elecloud								
\bigvee	Process Report P	osting Rec	quest Approval Act	ions Navig	ate Report	Less optio	ns			<u>م</u> ر ()	
B	General								Show r	nore	
	Customer Name	Relecto	ud	\sim	Requested Delive	ery Date					
	Contact	Jesse H	omer		External Docume	nt No.				- 11	
Acti	Posting Date	10/30/2	2018	Ē	Salesperson Base	Count				1	
Activ	Order Date	10/30/2	2018		Order Type					~	
\$	Due Date	11/13/2	2018	Ē						1	
Se	Lines Manage	More options									
ONG	TYPE	N0.	DESCRIPTION	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE DISCOUNT%	LINE AMOUNT EXCL. TAX		
SAI	Item	1908-S	Armless swivel chair, blue	2	PCS	190.10	FURNITURE		380.20		

Now we will check the Document Commissions screen for this order.

It shows a type III Group Commission of 30% is due to Salesperson Peter Saddow (PS). Running the Commissions Due Summary or Commissions Due Detail report will also show when this commission is due to be paid to Peter Saddow.

Dynamics 365	 Business C 	entral s-or	RD101009 · Rele	cloud > Order S-ORD10100	9			Er Si	wironment andbox	~	Q ©	Ę
× This ←	DOCUMENTCOMMISSIO	INS				+ 11						
<i>(</i>	Order S-	ORD10)1009									
	documentcommis	sion										74
	Document Type		Order			Commission B	ase				380.2	20
	No		S-ORD10100	09		Commission A	mount				114.0	06
	Sell-to Customer No.		50000			Avg. Commiss	ion %				30.0	00
	Sell-to Customer Name		Relectoud									
	Lines Man	age										
	SALESPER CODE	TYPE	NO.	DESCRIPTION	MARGIN	BASE	COMMISSION	COMMISSION PERCENTAGE TOTAL	BASE AMOUNT	COMMISSION AMOUNT	COMMIS LEVEL	
	PS	Item	1908-S	Armless swivel chair, blue	28.36	100.00	30.00	30.00	380.20	114.06	III. Group	

PROCESS PAYABLE COMMISSIONS

At some point you need to payout commissions due to your sales staff. A convenient way to do this is to use the Commissions Due report (Detail or Summary) to understand which commissions have become due and then process/pay the commissions using the Process Payable Commissions detail report. Once this report is executed in mode Final, the commissions due to the salesperson will be set to paid.

 Dynamics 3	65 ~	Business Central	Environment Sandbox	~	Q	\odot	_ III		?	8
CRONU	TELL ME	WHAT YOU WANT TO DO				2	\times	proval >		
Custome	process	payable								
HEADLIN	Go to P	ages and Tasks								
Wa	> Proc	cess Payable Commission Deta	ail	Tasks	5					
Bus	> Proc	cess Payable Commission Sum	imary	Tasks	5					

PROCESS PAYABLE COMMISSION DETAIL

Select Process Payable Commissions Detail and the Report filter screen will open. Enter the Salesperson code if you know it or use the drop-down arrow to the right. Next, select the Options fast tab. If you use a Report type value can of "Test", the commissions due will not be set to "paid". A report option of "Final" means that the commission due will be set to "paid". A report option of reprint simply reprints a previous report and has no effect on the commissions paid. The pay through date indicates that all commissions on or before that date will be marked as paid.

	Dynamics 365	 Business Central 	Environment Sandbox	ç 😳 e	s o ? 😣
Хн	elp us continue to imp	EDIT - PROCESS PAYABLE COM	MISSION DETAIL	~	ls 🗸
	CRONUS US	Options			opprovals V >
	Customers:				■ 0
	NO	Report Type	Test	~	
	000013	Register No.		0	
	10000	Register Description	Commissions Paid 10/30/18		
	20000	Pay Through Date	10/30/2018		t reports
	30000	Percent Type	Total	~	the error
	40000	New Page Per Salesperson			
	50000	Posting Date		810	
		Document No.			v
		Commission Ledger Er	ntry		3
		Where: Salesperson Code	→ is:	\sim	Sales
					0
					Sales
			Send to Print Prev	ew Cancel	emos
					0

Notice the report on page 1 shows a commission due amount to Mary Dempsey of \$114.06 for invoice a sales invoice. If the Process Payable Commissions Detail report is run in Final mode, it should set the commissions as being paid, which can be verified by re-running the Commissions Due Detail.

	Dynamics 365	~ B	usiness (Central	Custom	iers				Environment Sandbox			Ŷ) F	٢	?	8
ХН																	
																	\times
· · ·																	
c		Payable Cor	nmissions Det	ail									10/30	2018 4:24 PM			
-		CRONUS USP	, mg.											ADMIN			
		Report Type: Filters: Postion	Test	Regi	ster: 0	Commi	ssions Paid	10/30/18									
-		r mero. r obung		Document		Applies.to	Annlies.to				Line	Total Base	Commission				
		Posting Date	Туре	No. (ustomer No.	Doc. Type	Doc. No.	Entity Type	Entity No.	Description	Amount	Amount	Total	Amount			
		Salesperso	n Code	AH A	nnette Hill												
		10/30/2018	Pmt.	G02001 1	0000	Invoice	PS-	ltem	1900-S	PARIS Guest Chair, black	964.00	964.00	1.60	15.42			
		10/30/2018	Pmt.	G02001 1	0000	Invoice	PS-	ltem	1906-S	ATHENS Mobile Pedestal	2,168.00	2,168.00	1.60	34.69			
		Total for Sale	sperson Code A	н								3,132.00		50.11			
		Approved	By														
		Salesperso	n Code	PS F	eter Saddow		-										
		10/30/2018	Pmt.	G02001 1	0000	Invoice	PS-	ltem	1900-S	PARIS Guest Chair, black	964.00	964.00	10.00	96.40			
		10/30/2018	Pmt.	G02001 1	0000	Invoice	PS-	ltem	1906-S	ATHENS Mobile Pedestal	2,168.00	2,168.00	10.00	216.80			
		Total for Sale	sperson Code P	S								3,132.00		313.20			
_		Approved	By														
		Report Total					-					6,264.00		363.31			

PROCESS PAYABLE COMMISSION SUMMARY

There is also a Process Payable Commissions Summary report which will process just like the detail report. However, it will only show the total commission paid, rather than the individual commission amounts for each item on the invoice.

 Dynamics 365	~	Business Central	Environment Sandbox	9 C		۲	?	8
CRONUS US	EDIT	- PROCESS PAYABLE COMM	ISSION SUMMARY		⊿Z Ap	provals \vee	>	
Customers V	Opt	ions			- 1			
HEADLINE	Repo	rt Type	Test		~			
Want	Regis	ster No			0			
D .	Desci	ription	Commissions Paid 10/30/18		- 1			
Busin	Pay T	hrough Date	10/30/2018					
	Perce	ent Type	Total		~			
ACTIONS	New	Page Per Salesperson			- 1			
+ Sales Ouote	Posti	ng Date						
+ Sales Order	Docu	iment No.			- 1			
Activities Activities ~ SALES THIS MONT \$3,13, >See more	Cor ^{Show} W	nmission Ledger En results: here: Salesperson Code	try is:	wiew [63	~			
SALES INVOICES	_		Send to Print Pre	wiew Ca	ncel			

We will set the Report type to Final and the Description to "Commissions Paid 10/30/2018" and the Pay through Date to 10/30/2018. Then press the Send to \rightarrow PDF Document to run the report.

Here is the Payable Commissions Summary report showing the commission amount of \$363.31 being paid.

 Dynamics 36	5 ~ Business	Central				Environment Sandbox		~ & ©	e ©	? 8
										×
	Payable Com	missions	Summary					10/30/2	2018 4:30 PM	
	CRONUS USA,	Inc.							Page 1	
	Report Type:	Final		Register: 1	Commissions Paid 10/30/18				ADMIN	
	Filters: Posting I	Date:10/3	0/18, Open: Y	es						
	Posting Date	Туре	Documer No.	nt Customer No.	Description	Document Amount	Total Base Amount	Commission Percentage Total	Amount	
	Salesperson	Code	АН		Annette Hill					
	10/30/2018	Pmt.	PS-	10000	Order S-ORD101008	3,132.00	3,132.00	1.60	50.11	
	Total for Sales	person Co	de AH				3,132.00		50.11	
	Approved B	У			_					
	Salesperson	Code	PS		Peter Saddow					
	10/30/2018	Pmt.	PS-	10000	Order S-ORD101008	3,132.00	3,132.00	10.00	313.20	
	Total for Sales	person Co	de PS				3,132.00		313.20	
	Approved B	У						-		
	Report Total						6,264.00		363.31	

Now let us re-run the Commissions Due Detail report and check "Show History" to see what has changed from the first time it was run. Notice that the Commissions Due column is now zeros and the Commissions Paid column has a value of \$363.31 indicating the commission was paid.

 Dynamics 365 ~	Business (Central					Environment Sandbox		~ (2 0	ê	• ?	8
Filters: Salesperson Cod	: AHIPS											ADMIN	×
<u>Type Document</u> Salesperson Code	Posting <u>No. Date</u> AH	Entity T Annette F	Entity ypeNo. fill	Description	Total Base Amount	Commission Percentage Total	Amount	Amount Paid	Comm. Outstand.	Comm. Due	Comm. Possible	Period Comm.	
Invoice: PS-INV1032	10/30/201	8 Order S-0	ORD101008										- 1
Line No. 10,000		Item	1900-S	PARIS Guest Chair, black	964.00	1.6	15.42	15.42					- 1
Line No. 20,000		Item	1906-S	ATHENS Mobile Pedestal	2,168.00	1.6	34.69	34.69					- 1
				Total For: Invoice PS-INV103215	3,132.00	-	50.11	50.11	0.00	0.00	0.00		- 1
				Total for Salesperson Code AH	3,132.00	-	50.11	50.11	0.00	0.00	0.00		
Salesperson Code	PS	Peter Sac	ldow										
Invoice: PS-INV1032	5 10/30/201	18 Order S-C	ORD101008										- 1
Line No. 10,000		Item	1900-S	PARIS Guest Chair, black	964.00	10	96.40	96.40					- 1
Line No. 20,000		Item	1906-S	ATHENS Mobile Pedestal	2,168.00	10	216.80	216.80					- 1
				Total For: Invoice PS-INV103215	3,132.00	-	313.20	313.20	0.00	0.00	0.00		- 1
				Total for Salesperson Code PS	3,132.00	-	313.20	313.20	0.00	0.00	0.00		- 1
			Report [*]	Total	6,264.00	-	363.31	363.31	0.00	0.00	0.00		

PAYABLES INTERFACE

If the payment interface is turned on, as it is in our environment. What we will also see is an invoice has been created against the vendor that has been setup on the salesperson card.

Bynamics 3	65 V Business Central Commissions Setup		Environment Sandbox	9 © E
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н	Actions			
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	NEW ENTITY DEFAULTS	PAYABLES		
A.	Salesperson Commissionable	Payables Interface Active		
Ac SA	Item Commissionable	Commissions Payable Template Name	DEFAULT	
9	Default Item Commission %	0.00 Default Expense Account 6	0700	~
	Default Percent Type · · · · · · Total	~		
	Default Expiration Days	0		
Uynamics 3	65 -> Business Central Salespersons -> AH - Annette Hill		Environment Sandbox	9 © ₽
← ←	SALESPERSON/PURCHASER CARD	(2) + ii		
	AH · Annette Hill	\bigcirc		
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	General			
	Invoicing >			
	Commission Payments			
	Vendor ID V00020	Commission Expense Account	60700	~

If we open the Vendor card for Vendor V00020 and open the Vendor Ledger entries, we will see an invoice for \$50.11 (the total commission amount that was set to paid to Annette Hill)

	Dynam	ics 365	~ Bu	usiness Ce	entral	Vendors > V00	020 · Annette Hil	I			
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1	000013		General							Show le	:ss
	10000		No.		V00020)		Balance Due (\$)		50.1	1
-	20000		Name		Annette	e Hill		Document Send	ling Pr	~	~
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	50000		Privacy Bloo	cked · · · · ·				IC Partner Code		~	
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	Dynam	ics 365	~ B	usiness C	entral	Vendors > V0	0020 · Annette H	ill > V00020 · Ar	nnette Hill		
ХН	elp (\leftarrow	V00020 · Al	NNETTE HILL							
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-	00		POSTI DATE	NG	DOCUME TYPE	DOCUMENT NO.	EXTERNAL DOCUMEN NO.	VENDOR NO.	REMAINING AMOUNT	MESSAGE TO RECIPIENT	
	20		10/30,	/2018 :	Invoice	CMS-1000	AH 2	V00020	-50.11		
	30		10/30	/2018	Payment	108212	123541	V00020	0.00		
	10		10/30	/2018	INVOICE	108212	123541	V00020	0.00		

Now, if we run Suggest Vendor Payments from the Payment Journal our invoice to Annette Hill (V00020) will appear.

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EDIT - SUG	SEST VENDOR F	AYMENTS									,≓ ∠	I
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Starting Do	cument No.		G04001									C
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		POSTING DATE		DOCUME DATE	DOCUME TYPE	DOCUME NO.	EXTERNAL DOCUMEN NO.	ACCOUNT TYPE	ACCOUNT	10.	AMOUNT	RECIPI BANK ACCOU	IENT JNT	DESC	RIPTION	
		12/30/2018	÷	12/30/2018	Payment	G04001		Vendor	V00020		50.11			Annet	tte Hill	

We can now initiate payment to Annette for her commissions by any of the forms of payment you have setup in Dynamics 365 Business Central (Cash, check, ach, eft, etc.)