



## Commissions

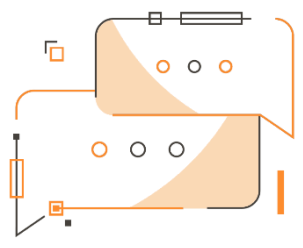
Calculate sales commissions in  
Microsoft Dynamics 365 Business Central



# 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.

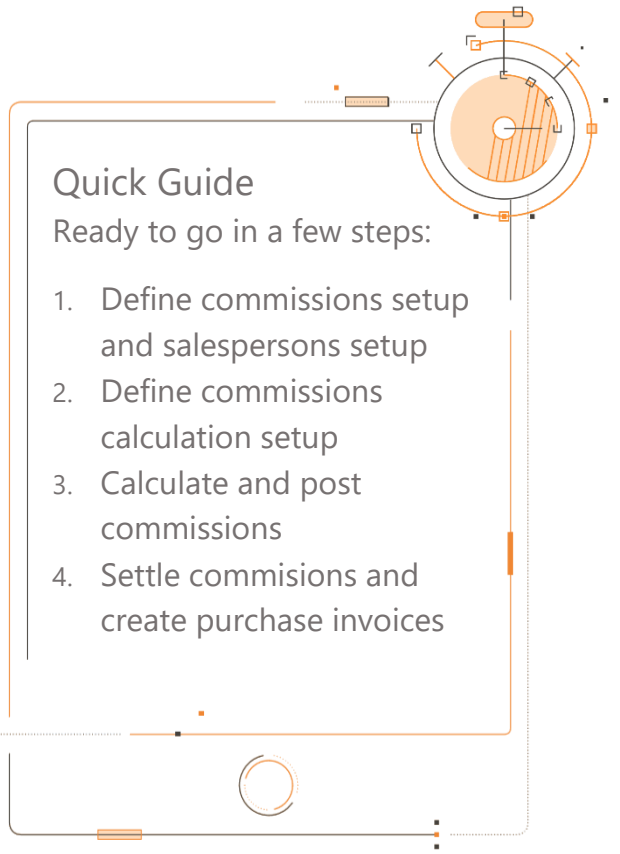


Do you need to calculate commissions for agents in a simple and quick way? Do you want to manage advances and allocations of the commissions? Do you need commissions to be settled directly through purchase invoices?

### 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



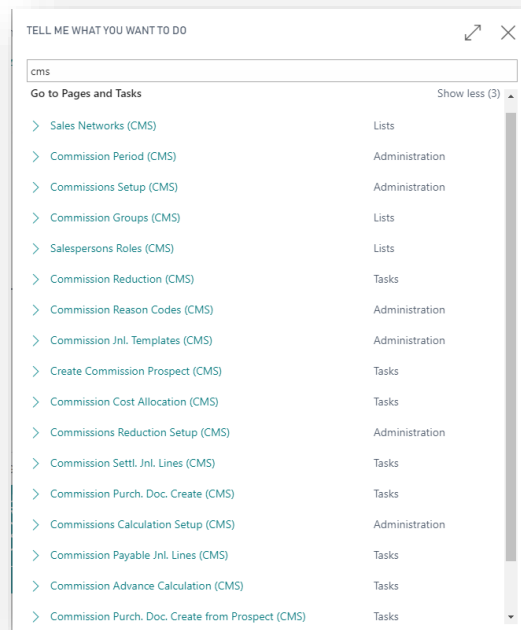
**Quick Guide**  
Ready to go in a few steps:

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



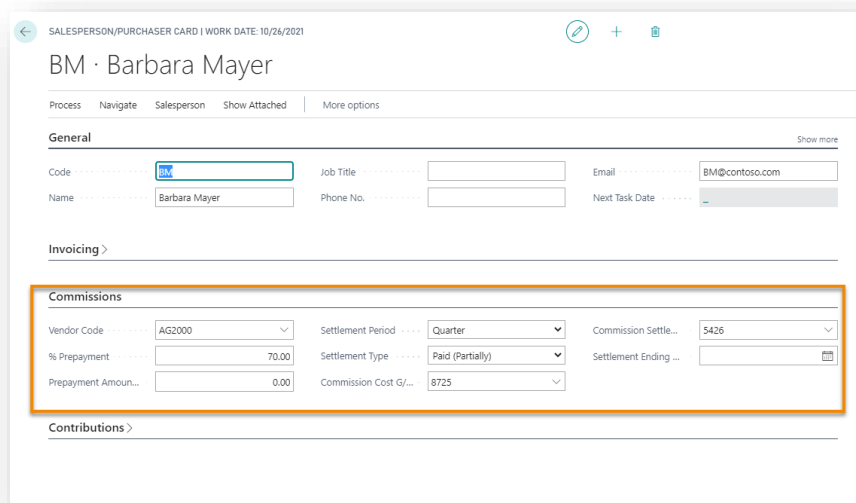
## Commissions - SUMMARY

Press ALT + Q and digit "CMS" for a summary of the functionalities:

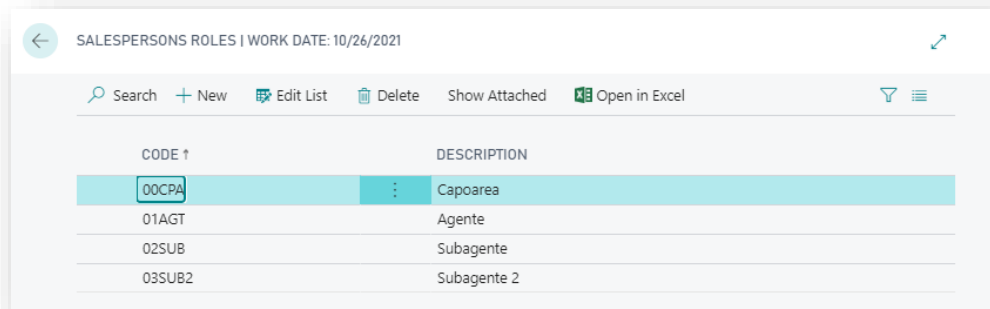


## Salespeople / Purchasers Setup

- First you need to set the basic information Salesperson / Purchaser Card:



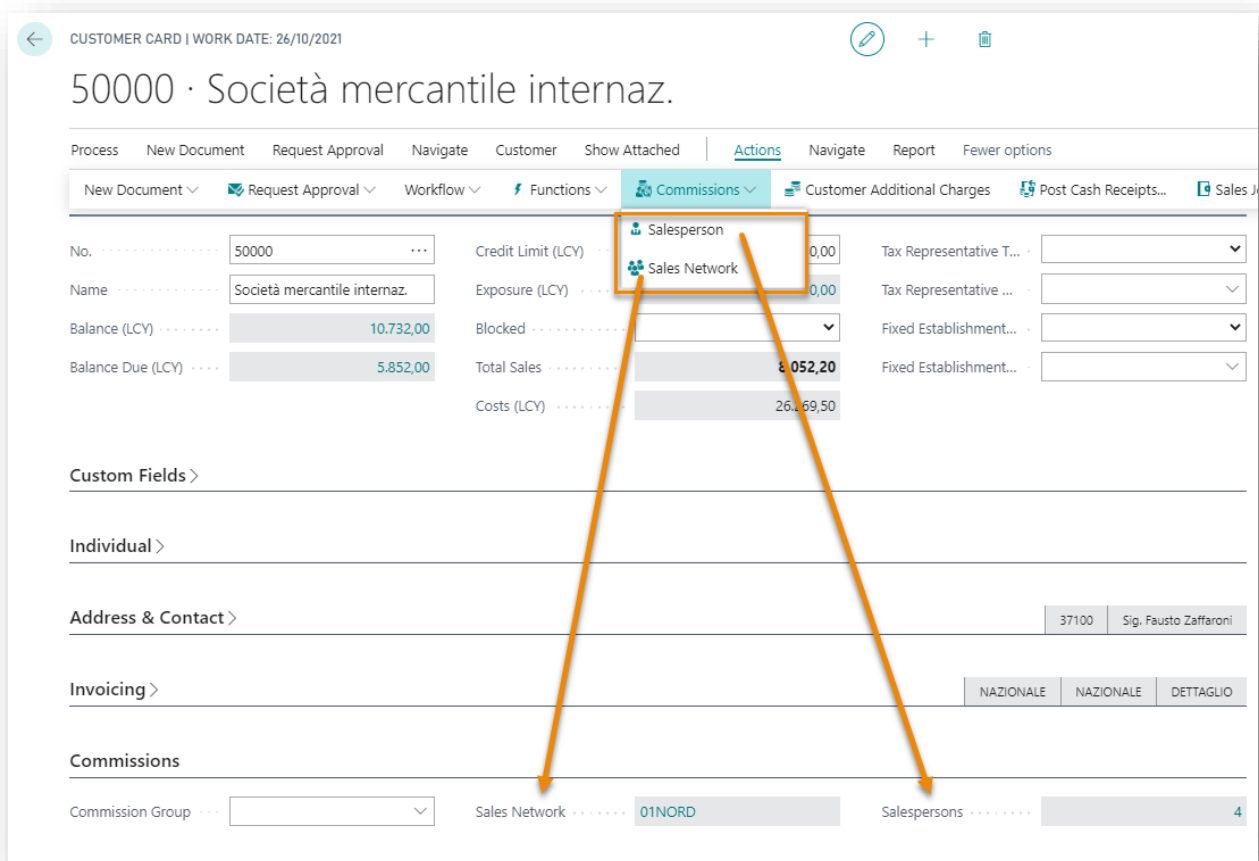
- Enter the salespersons roles in this table:



SALESPERSONS ROLES | WORK DATE: 10/26/2021

CODE ↑	DESCRIPTION
00CPA	Capoarea
01AGT	Agente
02SUB	Subagente
03SUB2	Subagente 2

- enter the sales network
- link commission groups to customers / items:
- On the customer card you can setup salespersons and sales network:



CUSTOMER CARD | WORK DATE: 26/10/2021

50000 · Società mercantile internaz.

Process New Document Request Approval Navigate Customer Show Attached Actions Navigate Report Fewer options

New Document Request Approval Workflow Functions Commissions Customer Additional Charges Post Cash Receipts... Sales J

No. ....	50000	Credit Limit (LCY) .....	0,00	Tax Representative T... ..	▼
Name .....	Società mercantile internaz.	Exposure (LCY) .....	0,00	Tax Representative ... ..	▼
Balance (LCY) .....	10.732,00	Blocked .....	▼	Fixed Establishment... ..	▼
Balance Due (LCY) .....	5.852,00	Total Sales .....	8.052,20	Fixed Establishment... ..	▼
		Costs (LCY) .....	26.69,50		

Custom Fields >

Individual >

Address & Contact > 37100 Sig. Fausto Zaffaroni

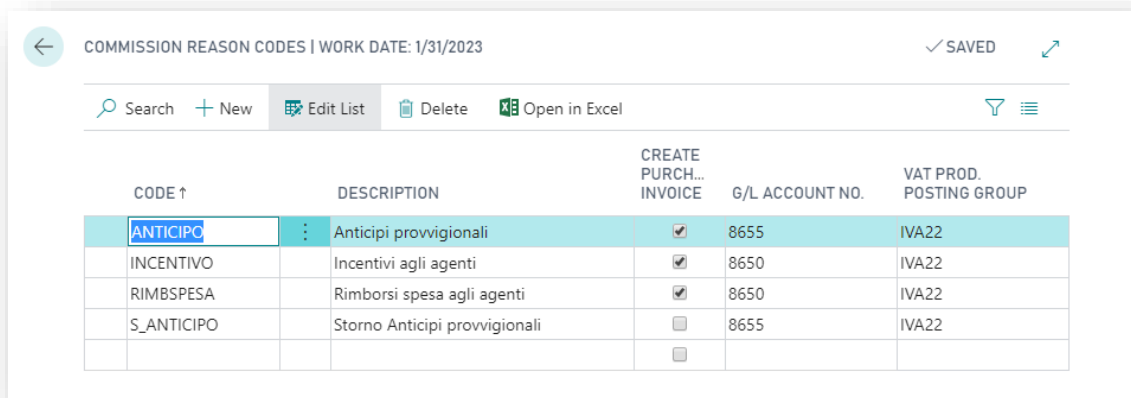
Invoicing > NAZIONALE NAZIONALE DETTAGLIO

Commissions

Commission Group ... ▼ Sales Network ..... 01NORD Salespersons ..... 4

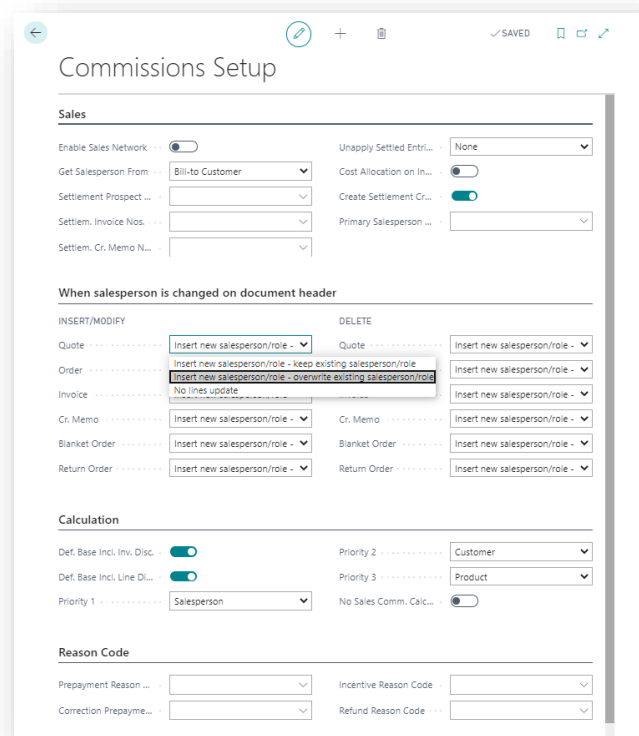
## Commission Calculation Setup

- 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:



CODE ↑	DESCRIPTION	CREATE PURCH... INVOICE	G/L ACCOUNT NO.	VAT PROD. POSTING GROUP
ANTICIPO	Anticipi provvigionali	<input checked="" type="checkbox"/>	8655	IVA22
INCENTIVO	Incentivi agli agenti	<input checked="" type="checkbox"/>	8650	IVA22
RIMBSPESA	Rimborsi spesa agli agenti	<input checked="" type="checkbox"/>	8650	IVA22
S_ANTICIPO	Storno Anticipi provvigionali	<input type="checkbox"/>	8655	IVA22
		<input type="checkbox"/>		

- 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:

COMMISSIONS CALCULATION SETUP | WORK DATE: 10/26/2021

Filters:  
Salesperson Role Filter: ... Customer Commission Group Filter: ...  
Salesperson Filter: ... Product Type Filter: ...  
Sales Network Filter: ... Product No. Filter: ...  
Customer No. Filter: ... Product Commission Group Filter: ...

Manage: **Set Threshold** Load salesperson combination Actions Fewer options

LINE NO. 1	DIS.	DESCRIPTION	SALES NETWORK FILTER	ROLE FILTER	SALESPERS. FILTER	CUSTOMER FILTER	CUSTOMER COMMISSION GROUP FILTER	PRODUCT TYPE	PRODUCT FILTER	PRODUCT COMMISSION GROUP FILTER	STARTING DATE	COMMISSION (%)	COMMISSION AMOUNT (L.CY)	THRESHO. TYPE	COMMISSION THRESHOLD
0	<input type="checkbox"/>				BM		CL-DETT	All		ART-ARRED	1/1/2019	3.00			
0	<input type="checkbox"/>				BM		CL-INGR	All		ART-BICI	1/1/2019	4.00			
0	<input type="checkbox"/>				BM	<->01905893		All			1/1/2020	6.00			
0	<input type="checkbox"/>				EV			All			1/1/2020				
0	<input type="checkbox"/>				FC			All				4.00			
0	<input type="checkbox"/>				GC			Item			1/1/2019	1.00			
0	<input type="checkbox"/>				GC			Item		ART-ARRED	1/1/2019	5.00			
0	<input type="checkbox"/>				GC			Item		ART-BICI	1/1/2019	7.00			
0	<input type="checkbox"/>		01NORD		BM			All			1/1/2020	46.00			
0	<input type="checkbox"/>		01NORD		BM	50000		Item	1000		1/1/2020	8.81			
0	<input type="checkbox"/>		01NORD	00CPA				All			1/1/2018	2.00			
0	<input type="checkbox"/>		01NORD	00CPA				All			1/1/2020	3.00			
0	<input type="checkbox"/>		01NORD	01AGT				All				40.00			
0	<input type="checkbox"/>		01NORD	01AGT				All			1/1/2020	41.00			

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 SETTLM. JNL. LINES | WORK DATE: 10/26/2021

Batch Name: DEFAULT

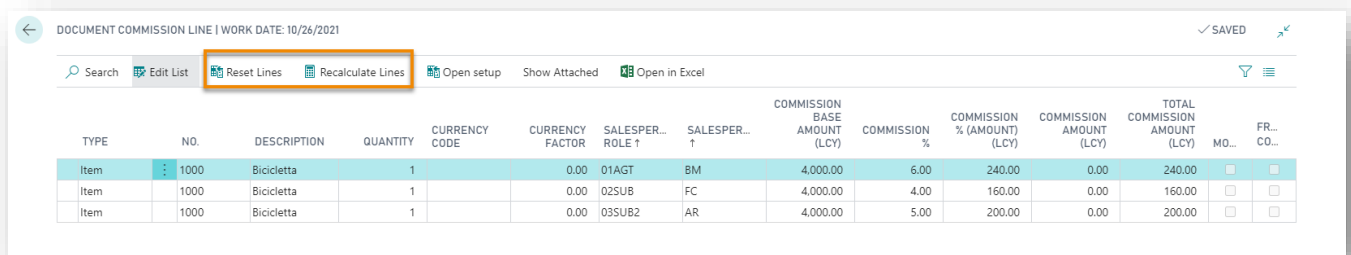
Filters:  
Salesperson Filter: ... Commission Period: \*

Manage: Get Entries to settle Post Salesperson Card

DATA DI REGISTRA...	DATA SCADENZA	NR. DOCUMENT...	DESCRIZIONE	CODICE CAUSALE PROVVISIIONE	CODICE AGENTE	CODICE RUOLO AGENTE	IMPORTO (VL)	IMPORTO	COD. VALUTA	FATTORE VALUTA	CODICE PERIODO PROVVISIIONE
01/01/2023	01/01/2023	003	incentivo	INCENTIVO	BM		5.000,00	5.000,00		0	202001

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:

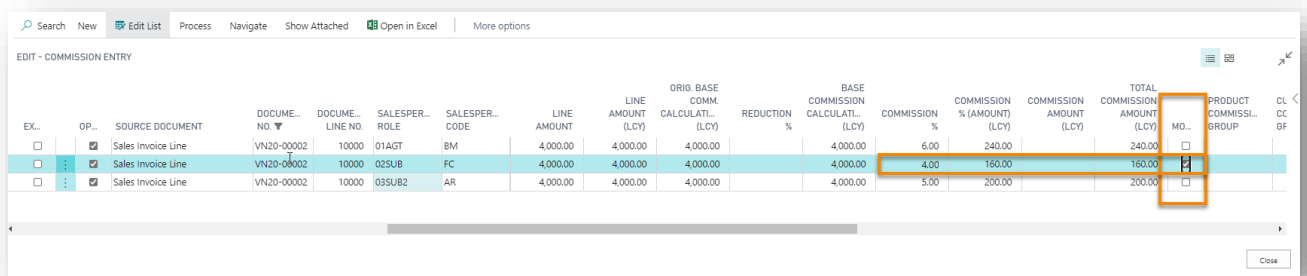


TYPE	NO.	DESCRIPTION	QUANTITY	CURRENCY CODE	CURRENCY FACTOR	SALESPERSON ROLE	SALESPERSON	COMMISSION BASE AMOUNT (LCY)	COMMISSION %	COMMISSION % (AMOUNT) (LCY)	COMMISSION AMOUNT (LCY)	TOTAL COMMISSION AMOUNT (LCY)	MO.	FR...
Item	1000	Bicicletta	1		0.00	01AGT	BM	4,000.00	6.00	240.00	0.00	240.00		
Item	1000	Bicicletta	1		0.00	02SUB	FC	4,000.00	4.00	160.00	0.00	160.00		
Item	1000	Bicicletta	1		0.00	03SUB2	AR	4,000.00	5.00	200.00	0.00	200.00		

Recalculate Lines makes it possible to recalculate according to what defined in setup.

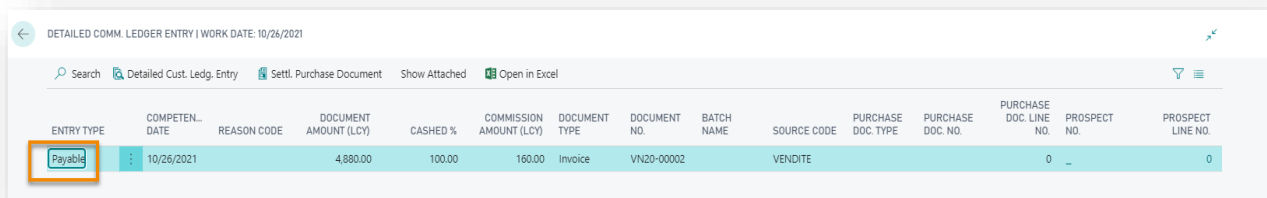
The lines are split for:

- Invoice line
- Salesperson role



EX.	OP.	SOURCE DOCUMENT	DOCUME. NO.	DOCUME. LINE NO.	SALESPERSON ROLE	SALESPERSON CODE	LINE AMOUNT	ORIG. BASE COMM. CALCULAT.	REDUCTION %	BASE COMMISSION CALCULAT.	COMMISSION %	COMMISSION % (AMOUNT) (LCY)	COMMISSION AMOUNT (LCY)	TOTAL COMMISSION AMOUNT (LCY)	PRODUCT COMMISSION GROUP	CL CC GF
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sales Invoice Line	VN20-00002	10000	01AGT	BM	4,000.00	4,000.00		4,000.00	6.00	240.00		240.00		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sales Invoice Line	VN20-00002	10000	02SUB	FC	4,000.00	4,000.00		4,000.00	4.00	160.00		160.00		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sales Invoice Line	VN20-00002	10000	03SUB2	AR	4,000.00	4,000.00		4,000.00	5.00	200.00		200.00		

On the page Detailed Commission Ledger Entry you can calculate the percentage of cashed, which is shown on page Commission Entry.



ENTRY TYPE	COMPETEN. DATE	REASON CODE	DOCUMENT AMOUNT (LCY)	CASHED %	COMMISSION AMOUNT (LCY)	DOCUMENT TYPE	DOCUMENT NO.	BATCH NAME	SOURCE CODE	PURCHASE DOC. TYPE	PURCHASE DOC. NO.	PURCHASE DOC. LINE NO.	PROSPECT NO.	PROSPECT LINE NO.
Payable	10/26/2021		4,880.00	100.00	160.00	Invoice	VN20-00002		VENDITE			0		0



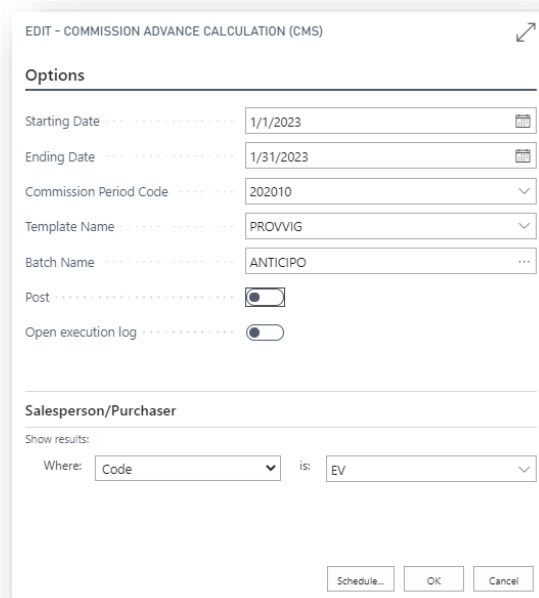


The system will display the line the line with Entry Type "Payable" only if it is actually to be settled, and therefore in the following situations:

- 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 created when 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):



The screenshot shows a dialog box titled "EDIT - COMMISSION ADVANCE CALCULATION (CMS)". It contains the following fields and options:

- Options**
  - Starting Date: 1/1/2023
  - Ending Date: 1/31/2023
  - Commission Period Code: 202010
  - Template Name: PROVIG
  - Batch Name: ANTICIPO
  - Post:
  - Open execution log:
- Salesperson/Purchaser**
  - Show results:
    - Where: Code
    - is: EV

Buttons at the bottom: Schedule..., OK, Cancel



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

POSTING DATE	DUE DATE	DOCUMENT NO	DESCRIPTION	COMMISSION REASON CODE	SALESPERSON CODE	AMOUNT (L.OY)	AMOUNT	CURRENCY FACTOR	COMMISSION PERIOD CODE
31/01/2023	15/01/2023	22-102006	Anticipo provvigione (percentuale):... ANTICIPO	EV		12.00	12.00	0	202301
31/01/2023	15/01/2023	22-102006	Storno anticipo provvigione: perio... S_ANTICIPO	EV		-12.00	-12.00	0	202301
31/01/2023	15/01/2023	22-102008	Anticipo provvigione (percentuale):... ANTICIPO	EV		30.00	30.00	0	202301
31/01/2023	15/01/2023	22-102008	Storno anticipo provvigione: perio... S_ANTICIPO	EV		-30.00	-30.00	0	202301
31/01/2023	31/01/2023	ANT0123	Anticipo provvigione (importo fiss... ANTICIPO	EV		1.000.00	1.000.00	0	202301
31/01/2023	31/01/2023	ANT0123	Storno anticipo provvigione: perio... S_ANTICIPO	EV		-1.000.00	-1.000.00	0	202301

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):

Options

Starting Date: 1/1/2023  
Ending Date: 1/31/2023  
Posting Descr.: single reason: Settlement: Salep. %1 reason %3 to date %2  
Posting Descr.: multiple reason: Settlement: Salep. %1 to date %2  
Open execution log:

Commission Reason Code

Show results: Where: Code is

Salesperson/Purchaser

Show results: Where: Code is

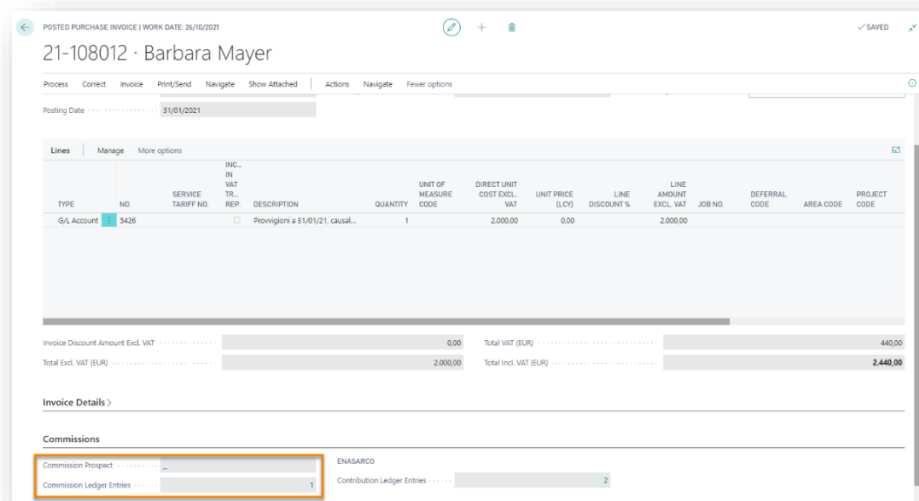
Schedule... OK Cancel

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.

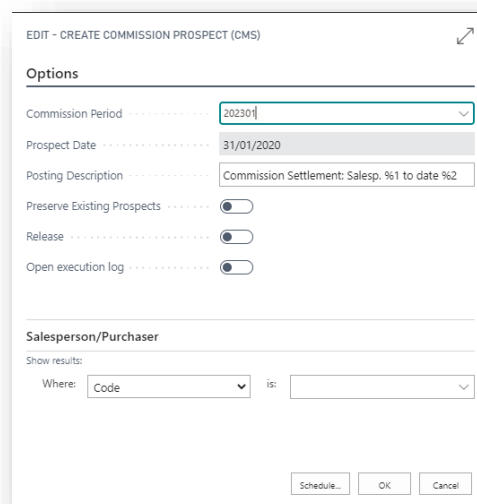
Otherwise you can perform the procedure by making a specific commission reason code in order to create an invoice for each commission reason code.

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 documents 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

NO. T	COMPETENCE PERIOD CODE	SALESPERSON NO.	SALESPERSON NAME	STATUS	VENDOR NO.	PAY-TO NAME	LINE TOTAL (LCY)	POSTING DATE	DOCUMENT DATE
LIQAG20-00...	202301	BM	Barbara Mayer	Aperto	F00030	Barbara mayer	300,00	31/01/2023	31/01/2023
LIQAG20-00...	202301	EV	Eva Valverde	Aperto	F00040	Eva Valverde	150,00	31/01/2023	31/01/2023
LIQAG20-00...	202301	FC	Fernando Caro	Aperto	F00050	Fernando Caro	150,00	31/01/2023	31/01/2023
LIQAG20-00...	202301	GC	Gabriele Cannata	Aperto	F00070	Gabriele Cannata	150,00	31/01/2023	31/01/2023

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

EDIT - COMMISSION PURCH. DOC. CREATE FROM PROSPECT (CMS)

**Options**

Open execution log

---

**Commission Prospect Header**

Show results:

Where:  is:

And:  is:

And:  is:

And:  is:

Schedule... OK Cancel

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](http://www.eos-solutions.it/en/contact-support.html)

