

innovia
CONSULTING



Taking the Headache Out of
Commissions Calculation in BC

Today's Presenters



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Presenter Introductions



Agenda

- ✓ Introduction to Commission
- ✓ How can Commission be paid in Standard BC
- ✓ How can an ISV help expand BC functionality
 - ✓ Transaction Direct Calculations
 - ✓ Sales Targets
 - ✓ Splitting/Sales Team Calculations
 - ✓ End Of Month Calculations
 - ✓ Commission Settlements
- ✓ Reporting and BI
- ✓ Testimonial
- ✓ Q&A



Let's get started!



Introduction to Commissions

- ✓ What are Commissions?
- ✓ Where can Commissions be set up in Standard BC?
 - ✓ Can we have complex calculations?
 - ✓ Do we have an automatic calculation for Commissions?
 - ✓ How can Dimensions help in Commission calculations



How can an ISV Help?

- ✓ Direct: generate Commissions automatically when a sales document is posted.
- ✓ Sales Targets: set tiered sales targets for different date periods.
- ✓ Settle: settle Commissions using purchase invoices or settlement documents.



What Else?

- ✓ Flexible: Commission journals, update actions, and many events to let users extend BC to meet their needs.
- ✓ Splitting & Sales Team: Define teams and generate indirect Commissions for different roles within the team.
- ✓ Specific Reporting: Wide range of sales and Commissions reports.



Direct Commission

- ✓ Commission Ledger is generated automatically when a sales document is posted.
- ✓ Commission amount is based on multiple criteria including combinations such as item, customer, salesperson, profit margin, dimension, date, etc.
- ✓ Percentage applied to the sales amount or profit margin and/or a Fixed Commission amount can be used.
- ✓ Maximum Discount % / Minimum Profitability %.

Dynamics 365 Business Central

Direct Commission Rates

✓ Saved

Search + New Edit List Delete Edit View Copy Commission Rate Open in Excel

Salesperson Filter ↑	Salesperson Code ↑	Boss Com...	Type Filter	Filter No.	Commission %	Start Date	End Date
All Salespeo...		<input type="checkbox"/>	Item Group	BIKES	10,00		
All Salespeo...		<input type="checkbox"/>	Item Group	FURNITURE	15,00		
All Salespeo...		<input type="checkbox"/>	All		5,00		
→ Salesperson	BD	<input type="checkbox"/>	Item	1000	12,00	01/01/2021	01/01/2022
Salesperson ...	VALENCIA	<input type="checkbox"/>	Item Group	BIKES	11,00		

Direct Commission

- ✓ A Commission value preview is added on the transaction factbox in BC

Dynamics 365 Business Central

Sales Invoice
102224 · Adatum Corporation

Posting Prepare Invoice Release Request Approval Navigate More options

General > Adatum Corporation 13/12/2021 31/12/2021 Open

Type	No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. VAT	VAT Prod. Posting Group	Line Disco... %	Line Amount Excl. VAT
→ Item	1896-S	Escritorio ATENAS	2	UDS	1.005,80	IVA21		2.011,60

Subtotal Excl. VAT (EUR) 2.011,60 Total Excl. VAT (EUR) 2.011,60
Inv. Discount Amount E... 0,00 Total VAT (EUR) 422,44
Invoice Discount % 0 Total Incl. VAT (EUR) 2.434,04

Details Attachments (0)

Indirect Cost % 0
Last Direct Cost 784,60
Profit % 21,99244
Unit Price 1.005,80

Line Commission Preview

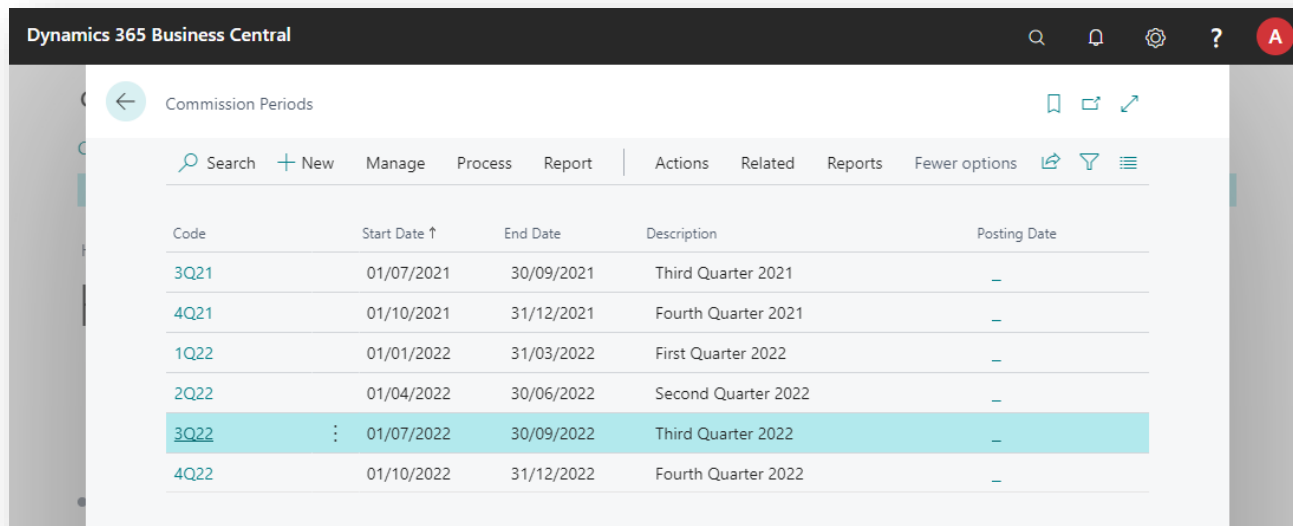
Expected Commissions	
Alberto Tercedor	24,14
Desiré Mendoza	16,09
Sergio Valladares	201,16

Base Amounts

VAT Base Amount	2.011,60
Real Line Discount %	0,00
Profit Margin Amount (LCY)	442,40

Sales Target Commission

- ✓ Generated for a salesperson when they achieve sales targets set for a commission period.
- ✓ Commission periods: Includes sales depending on when they were posted or collected.



The screenshot displays the Dynamics 365 Business Central interface for the 'Commission Periods' table. The table lists various commission periods with columns for Code, Start Date, End Date, Description, and Posting Date. The '3Q22' row is highlighted in light blue.

Code	Start Date ↑	End Date	Description	Posting Date
3Q21	01/07/2021	30/09/2021	Third Quarter 2021	-
4Q21	01/10/2021	31/12/2021	Fourth Quarter 2021	-
1Q22	01/01/2022	31/03/2022	First Quarter 2022	-
2Q22	01/04/2022	30/06/2022	Second Quarter 2022	-
3Q22	01/07/2022	30/09/2022	Third Quarter 2022	-
4Q22	01/10/2022	31/12/2022	Fourth Quarter 2022	-

Sales Target Commissions

- ✓ Defines which combination of sales lines/customers/salespeople will be included.

The screenshot displays two side-by-side windows from Dynamics 365 Business Central. The left window is titled 'Commission Period' and shows configuration for '2Q22 · Second Quarter 2022'. The right window is titled 'Commission Period Sales Target' and shows configuration for '2Q22 · FURNITURE · Furniture'.

Commission Period Configuration:

- Code: 2Q22
- Description: Segundo trimestre 2022
- Start Date: 01/04/2022
- End Date: 30/06/2022
- Include Invoices: Posted Invoice

Commission Period Sales Target Configuration:

- Sales Target Code: FURNITURE
- Description: Furniture
- Salesperson Filter: All Salespeople
- Type Filter: Item Group
- Filter No.: FURNITURE

Target Ranges Table:

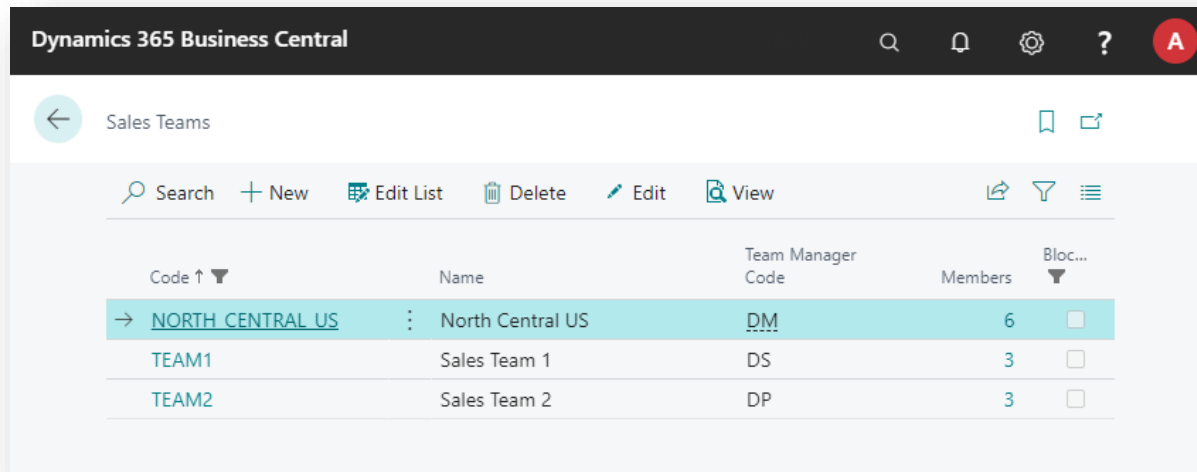
Minimum Amount	Min. Profit Margin %	Minimum Quantity	Fixed Commission Amount	Commission %	Comments
10,000	30	0	0	4	
100,000	30	0	0	5	
1,000,000	30	0	1,000	6	

Commission Calculation:

- Target Amount: Sales Amount
- Fixed Commission Calc.: Highest
- Commis. Base Amount: Sales Amount
- % Commission Calc.: Highest

Sales Teams and Splitting

- ✓ Sales teams (and roles within the team) to be defined.
- ✓ Possibility to assign a salesperson to several teams.
- ✓ Customers and sales documents can be assigned to specific teams.



The screenshot shows the Dynamics 365 Business Central interface for the 'Sales Teams' list. The table contains the following data:

Code	Name	Team Manager Code	Members	Bloc...
NORTH CENTRAL US	North Central US	DM	6	<input type="checkbox"/>
TEAM1	Sales Team 1	DS	3	<input type="checkbox"/>
TEAM2	Sales Team 2	DP	3	<input type="checkbox"/>

Sales Teams and Splitting

Dynamics 365 Business Central

Sandbox

Sales Team

NORTH_CENTRAL_US · North Central US

General

Code: NORTH_CENTRAL_US Team Manager C...: DM

Name: North Central US Blocked:

Members | Manage

Salesperson Code ↑	Salesperson Name
→ AT	Alberto Tercedor
CA	Candela Arrais
CM	Carlos Matías
DP	Dalia Pelayo
DS	David Serna
SV	Sergio Valladares

Dynamics 365 Business Central

Direct Commission Rate Card

All Salespeople · All Customers · All

General >

Filters [Show more](#)

Salesperson Filter: All Salespeople Type Filter: All

Salesperson Code: Filter No.:

Commission

Commission %: 2,00

Fixed Commission...: 0

Commis. Base Am...: Sales Amount

Commission For: Sales Team Role

Team Role: MEMBER

Commission Entries

& Reporting



Commission Entries

- ✓ Direct Commissions:
 - ✓ When posting sales documents.
 - ✓ Manually from posted sales lists/documents.
- ✓ Sales Targets Commissions:
 - ✓ Run “*Generate Commissions*” action for a period/sales target.

Dynamics 365 Business Central

Sandbox

Commission Entries

Commission Entries: All | Search | New | Process | Entry | Settlements | Navigate | More options

Set On Hold... | Cancel... | Reassign Commission Amount...

Posting Date	Salespers... Code	Document Type	Document No.	Sales Targ... Code	Base Amount	Commission Amount	Outstanding Commission Amount	Open Invoice	Status	Modifi...	Entry No.
13/12/2021		Invoice	103219		2,011.60	40.23	0.00	Yes	Settled	No	927
13/12/2021		Invoice	103221		2,011.60	40.23	0.00	No	Cancelled	No	930
13/12/2021	CM	Invoice	103223		1,005.80	20.12	20.12	Yes	Pending	No	232
13/12/2021	CM	Credit Memo	104003		-1,005.80	-20.12	-20.12	Yes	Pending	No	935
13/12/2021	DP	Invoice	103223		1,005.80	100.00	100.00	Yes	Pending	Yes	233
13/12/2021	DP	Credit Memo	104003		-1,005.80	-10.06	-10.06	Yes	Pending	No	936
13/12/2021	DS	Credit Memo	104003		-1,005.80	-100.58	-100.58	Yes	Pending	No	937
13/12/2021	SV	Manual	TESTM2		0.00	20.00	20.00	No	Pending	No	942



Commissions Settlement

- ✓ Settlement Document: used to choose which Commissions are going to be paid to a salesperson in real time.
- ✓ Direct Commissions settlement: it can be done when the original sales document is posted or only when it has been collected.

The image shows two screenshots of the Dynamics 365 Business Central interface. The left screenshot displays a list of 'COMMISSION SETTLEMENTS' with columns for No., Salesperson Code, Salesperson Name, and Document Date. The right screenshot shows the details for document '1005 · MS', including general information and a table of commission lines.

No.	Salesperson Code	Salesperson Name	Document Date
1002	MS	Miguel Severino	4/6/2020
1003	AB	Antonio Bernejo	6/8/2020
1004	BD	Brenda Diaz	6/8/2020
1005	MS	Miguel Severino	2/1/2020

Document Type	Description	Customer No.	Commission Amount To Settle
Invoice	Comisión de Factura 103159	20000	3.31
Invoice	Comisión de Factura 103160	10000	15.50
Invoice	Comisión de Factura 103161	30000	3.87
Invoice	Comisión de Factura 103162	50000	7.64
Invoice	Comisión de Factura 103163	40000	7.75
Invoice	Comisión de Factura 103164	20000	50.20



Commissions Settlement

(External Agents)

- ✓ For external salespeople, iDynamics Commissions allows you to settle Commissions using purchase invoices/credit memos.

Dynamics 365 Business Central

Sandbox

PURCHASE INVOICE

107215 · Gustavo Camargo

Invoice Posting Request Approval Incoming Document Release Navigate More options

General Show more

Vendor Name Gustavo Camargo Due Date 11/5/2019

Contact Vendor Invoice No. GC00023

Posting Date 11/5/2019

Lines Manage More options

New Line Delete Line Select items... Get Unsettled Commissions...

Comment	G/L Account	Description	Quantity	Amount
Vendor Gustavo Camargo:				
G/L Account	6400002	Comisión de Factura 103241	1	286.50



Reports: Direct Commissions Forecast

Direct Commissions Forecast

CRONUS ES

Period: 1/1/2020 - 4/30/2020

February 28, 2020

Antonio Bermejo (External)

Posting Date	Document No.	Customer	Base Amount	Payment Date	Status	Commission
18/02/20	103221	School of Fine Art	3,017.40	29/02/20	Pending	150.87

Total Antonio Bermejo

150.87

Brenda Díaz

Posting Date	Document No.	Customer	Base Amount	Payment Date	Status	Commission
06/04/20	103216	Relecloud	14,081.20	20/04/20	Pending	704.06
06/04/20	103217	Relecloud	14,081.20	20/04/20	Pending	704.06

Total Brenda Díaz

1,408.12

Miguel Severino

Posting Date	Document No.	Customer	Base Amount	Payment Date	Status	Commission
01/01/20	103158	School of Fine Art	193.70	01/01/20	Collected	3.87
16/01/20	103160	Adatum Corporation	774.80	16/01/20	Collected	15.50
17/01/20	103161	School of Fine Art	193.70	17/01/20	Collected	3.87
18/01/20	103162	Relecloud	382.00	18/01/20	Collected	7.64
19/01/20	103163	Alpine Ski House	387.40	19/01/20	Collected	7.75
20/01/20	103164	Trey Research	2,510.00	20/01/20	Collected	50.20
20/01/20	103165	Adatum Corporation	6,416.80	20/01/20	Collected	309.38
22/01/20	103166	Relecloud	2,614.80	22/01/20	Collected	130.74
23/01/20	103168	Alpine Ski House	4,054.30	23/01/20	Collected	139.69
25/01/20	103169	Trey Research	774.80	08/02/20	Unpaid	15.50
26/01/20	103170	School of Fine Art	6,530.50	31/01/20	Unpaid	251.31
31/01/20	103171	Relecloud	2,728.10	31/01/20	Unpaid	113.17
01/02/20	103172	School of Fine Art	48.00	02/02/20	Pending	22.97
14/02/20	103174	Adatum Corporation	774.80	12/20	Collected	15.50
16/02/20	103175	School of Fine Art	387.40	16/02/20	Collected	7.75
17/02/20	103176	Alpine Ski House	387.40	17/02/20	Collected	7.75



Reports: Commissions per Salesperson

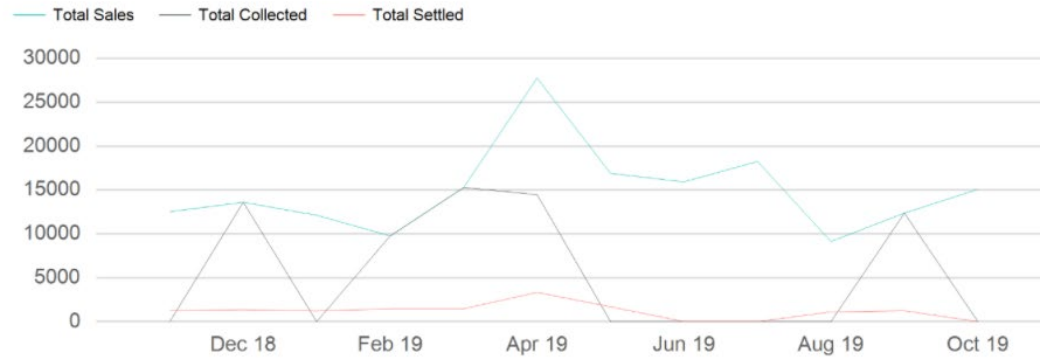
Commissions per Salesperson

CRONUS ES

November 13, 2019

Period: November 2018 - October 2019

Antonio Bermejo



Total Sales:	178,761.30	Sales Average:	14,896.78
Total Collected:	65,504.80	Collected Average:	5,458.73
Total Settled:	14,124.16	Settled Average:	1,177.01

		Sales	Commissions	Collected	Settled
2018	November	12,528.30	1,252.83	0.00	1,252.83
	December	13,607.20	1,360.72	13,607.20	1,360.72
2019	January	12,128.00	1,212.80	0.00	1,212.80
	February	9,766.50	1,464.98	9,766.50	1,464.98
	March	15,280.00	1,466.88	15,280.00	1,466.88
	April	27,769.40	3,330.38	14,478.90	3,330.38
	May	16,894.00	1,689.40	0.00	1,689.40
	June	15,938.00	1,593.80	0.00	0.00



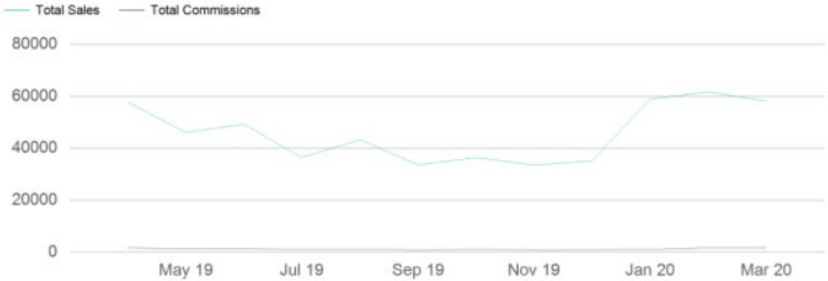
Reports: Direct Commissions per Salesperson

Direct Commissions per Salesperson

CRONUS ES
March 2, 2020

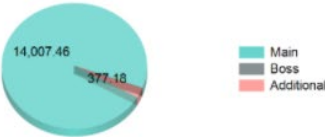
Period: April 2019 - March 2020

Miguel Severino



Total Sales:	550,572.90	Sales Average:	45,881.08
Total Commissions:	14,384.64	Commission Average:	1,198.72

		Sales		Commissions			
		Total	Main	Boss	Additional	Total	
2019	April	57,811.60	1,639.02	0.00	0.00	1,639.02	
	May	46,048.70	1,293.69	0.00	0.00	1,293.69	
	June	49,260.40	1,333.75	0.00	0.00	1,333.75	
	July	36,429.70	1,010.79	0.00	0.00	1,010.79	
	August	43,336.50	1,143.56	0.00	0.00	1,143.56	
	September	33,672.40	855.82	0.00	0.00	855.82	
	October	36,407.00	1,000.94	0.00	0.00	1,000.94	
	November	33,538.20	890.28	0.00	0.00	890.28	
	December	35,208.20	529.72	0.00	377.18	906.90	
	2020	January	58,985.50	1,048.62	0.00	0.00	1,048.62
		February	61,709.10	1,661.57	0.00	0.00	1,661.57
		March	58,165.60	1,599.70	0.00	0.00	1,599.70



Customer Testimonial

✓ Bryan Christian (Director Of IT) VPT



Any Questions?



Thanks for Joining Us



Please Use the Code to Access Your Survey

