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Infotech Commissions User Guide

Version: 1.0.0.0
Publication Date: March 21, 2025

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Introduction

The Infotech Commissions extension enhances Microsoft Dynamics 365 Business Central with a robust commission management system. This user guide provides step-by-step instructions for setting up and using the commission management features, including customer and item commission groups, multiple salesperson assignments, commission calculation, statement generation, email notifications, and annual sales tiers.

Setup

Commission Setup

The Commission Setup page contains global configuration options for the commission management system.

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Commission Setup**.

2. Configure the following settings on the **General** FastTab:

   - **Number Series**: Set up number series for commission statements and posted commission statements.
   - **Payment Requirements**: Specify whether full payment is required before commissions are payable.
   - **Default G/L Account**: Select the default G/L account for commission expenses.
   - **Default Posting Group**: Select the default posting group for commission invoices.
   - **Split Percentages**: Enable or disable split percentages for multiple salespeople.
   - **Use Annual Sales Tiers**: Enable or disable commission rates based on annual sales performance.
   - **Annual Sales Calc. Period**: If annual sales tiers are enabled, specify the period for calculating annual sales (e.g., -1Y for one year back from the transaction date).

3. Configure Email Settings on the **Email Settings** FastTab:

   - **Email Notifications Enabled**: Turn on to enable email notifications for commission statements.
   - **Email Scenario**: Select the "Commission Statement" scenario.
   - **Email Subject**: Define the default subject for commission statement emails (you can use %1 as a placeholder for the statement number).
   - **Email CC** and **Email BCC**: Enter email addresses for CC and BCC recipients (separate multiple addresses with semicolons).
   - **Email Body**: Use the rich text editor to create a template for commission statement emails.
   - **Attach Commission Statement**: Enable to automatically attach the commission statement PDF to emails.

4. Click **Setup Email Account** in the actions to configure the email account for sending commission statements.

Customer Commission Groups

Customer Commission Groups allow you to categorize customers for commission calculation purposes.

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Customer Commission Groups**.
2. Click **New** to create a new group.
3. Enter a **Code** and **Description** for the group.
4. Click **OK** to save the group.

Item Commission Groups

Item Commission Groups allow you to categorize items for commission calculations.

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Item Commission Groups**.
2. Click **New** to create a new group.
3. Enter a **Code** and **Description** for the group.
4. Click **OK** to save the group.

Commission Rates

The Commission Rates page allows you to define commission rates based on customer commission groups and item commission groups.

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Commission Rates**.

2. Create a new commission rate by specifying:

    - **Customer Commission Group**: Select a customer commission group or leave blank for all groups.
    - **Item Commission Group**: Select an item commission group or leave blank for all groups.
    - **Salesperson Code**: Select a salesperson or leave blank for all salespeople.
    - **Starting Date**: Specify the date from which the commission rate is valid.
    - **Ending Date**: Optionally specify an end date for the commission rate.
    - **Minimum Annual Sales**: If annual sales tiers are enabled, specify the minimum annual sales amount for this commission rate tier.
    - **Commission %**: Enter the commission percentage.
    - **Commission Amount**: Alternatively, enter a fixed commission amount.

3. The system will use the most specific commission rate that matches the criteria for a sales transaction. If annual sales tiers are enabled, it will also consider the salesperson's annual sales amount when determining the appropriate rate.

4. You can create multiple commission rate tiers for the same customer/item group combination with different minimum annual sales amounts to create a tiered commission structure.

Email Configuration

To set up email functionality for commission statements:

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Commission Setup**.
2. Go to the **Email Settings** FastTab.
3. Enable **Email Notifications Enabled**.

4. Click the **Setup Email Account** action.
5. In the Email Accounts page, select or create an email account to use for commission statements.
6. Return to the Commission Setup page and configure the email template:
    - Enter a subject in **Email Subject** (you can use %1 as a placeholder for the statement number).
    - Add CC and BCC recipients if needed.
    - Use the rich text editor to create an email body template.
    - Enable **Attach Commission Statement** to include the PDF as an attachment.
7. Click **OK** to save the settings.

Daily Operations

Customer Management

Assigning Commission Groups to Customers

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Customers**.
2. Open the customer card you want to modify.
3. On the **Invoicing** FastTab, select the appropriate **Customer Commission Group**.
4. Click **OK** to save the changes.

Assigning Multiple Salespeople to Customers

1. Open the customer card.
2. Navigate to the **Salespeople** FastTab.
3. Click **Add** to assign a new salesperson.
4. Select the **Salesperson Code**.
5. If split percentages are enabled, enter the **Split Percentage** for this salesperson.
6. Repeat for additional salespeople, ensuring that split percentages total 100%.
7. Click **OK** to save the changes.

Item Management

Assigning Commission Groups to Items

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Items**.
2. Open the item card you want to modify.
3. On the **Invoicing** FastTab, select the appropriate **Item Commission Group**.
4. Click **OK** to save the changes.

Sales Document Processing

Working with Salespeople on Sales Documents

1. Create a new sales document (order, invoice, credit memo, or return order).
2. By default, salespeople assigned to the customer will be automatically populated.
3. To modify salespeople assignments:
    - Navigate to the **Salespeople** FastTab.
    - Add, remove, or modify salespeople as needed.

    - If split percentages are enabled, ensure they total 100%.
4. Click **OK** to save the changes.

Overriding Commission Settings on Sales Lines

1. Open a sales document (order, invoice, quote, etc.).
2. On the **Lines** tab, select a line.
3. Click **Line** > **Salesperson Commissions** to open the Sales Line Commissions page.
4. In the Sales Line Commissions page, you can:
    - Add or remove salespeople specific to this sales line
    - Specify the **Commission Type** (Percentage or Amount) for each salesperson
    - Set the **Commission Value** based on the selected commission type
    - Adjust **Split Percentages** if split percentages are enabled in Commission Setup
5. These settings will override the default commission rates determined by the customer and item commission groups for this specific sales line.
6. Click **OK** to save the changes.

Note: The commission will be calculated during posting based on these overrides if specified, otherwise the system will use the default commission rates based on the customer commission group, item commission group, and applicable commission rates.

Commission Statements

Generating Commission Statements

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Commission Statements**.
2. Click **New** to create a new statement.
3. Enter the following information:
    - **Salesperson Code**: Select the salesperson.
    - **Starting Date** and **Ending Date**: Define the period for the statement.
4. Click **Process** > **Suggest Lines** to populate the statement with eligible commission entries.
5. Review the suggested lines and make any necessary adjustments.
6. Click **OK** to save the statement.

Previewing Commission Statements

1. Open a commission statement.
2. Click **Process** > **Preview Posting**.
3. Review the preview to see how the statement will appear when posted.
4. Close the preview when finished.

Releasing Commission Statements

1. Open a commission statement.

2. Click **Process** > **Release**.
3. The statement status will change to "Released", indicating it's ready for posting.

Posting Commission Statements

1. Open a released commission statement.
2. Click **Process** > **Post**.
3. Choose whether to create purchase invoices for the commission payment.
4. Click **OK** to post the statement.
5. The posted statement will be available in the Posted Commission Statements list.

Batch Posting Commission Statements

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Post Commission Statements**.
2. Set filters to select the commission statements you want to post:
    - **No.**: Filter by specific statement numbers.
    - **Salesperson Code**: Filter by salesperson.
    - **Starting Date** and **Ending Date**: Define the date range.
3. On the Options FastTab, select whether to **Create Purchase Invoices** during posting.
4. Click **OK** to process the selected statements.
5. The system will post all selected statements and optionally create purchase invoices based on your selection.

Generating Purchase Invoices for Commission Payments

The system provides multiple options for creating vendor purchase invoices to pay commissions to salespeople:

1. **During Posting**:

    - When posting a commission statement, you can choose to automatically create a purchase invoices.
    - In the posting dialog, select **Create Purchase Invoices** to generate the invoices during posting.
    - The system will create purchase invoices using the vendor associated with the salesperson.

2. **After Posting**:

    - Use the search function (magnifying glass icon or Alt+Q) and search for **Posted Commission Statements**.
    - Select the posted statement for which you want to create purchase invoices.
    - Click **Process** > **Create Purchase Invoices**.
    - The system will create new purchase invoices and link them to the posted commission statement.

3. **Purchase Invoice Configuration**:

    - The purchase invoices will use the vendor specified in the Salesperson/Purchaser card.
    - The G/L account used will be the one specified in Commission Setup or overridden at the statement level.
    - The invoices will include a line for each commission statement line, with appropriate descriptions.

- The purchase invoice numbers will be stored in the posted commission statement for reference.

4. **Managing Purchase Invoices**:

   - To view the associated purchase invoice, open the posted commission statement and click **Related** > **Purchase Invoice**.
   - If the purchase invoice is deleted before posting, you can create a new one using the **Create Purchase Invoice** action.
   - Once the purchase invoice is posted, the system updates the posted commission statement with the posted purchase invoice number.
   - The **Purchase Document Type** field indicates whether the linked invoice is posted or unposted.

5. **Batch Processing**:

   - To create purchase invoices for multiple posted commission statements, use the **Create Purchase Invoices for Commissions** batch job.
   - Use the search function (magnifying glass icon or Alt+Q) and search for **Create Purchase Invoices for Commissions**.
   - Set filters to select the posted commission statements for which you want to create purchase invoices.
   - Run the report to generate purchase invoices for all selected statements.

Email Notifications

Sending Commission Statements via Email

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Commission Statements** or **Posted Commission Statements**.
2. Select the statement you want to send.
3. Click **Process** > **Send Email**.
4. The system will send an email to the salesperson using the template configured in Commission Setup.
5. A confirmation message will appear when the email is sent successfully.

Annual Sales Tiers

If you've enabled annual sales tiers in the Commission Setup, the system will automatically calculate the appropriate commission rate based on each salesperson's historical sales performance.

How Annual Sales Tiers Work

1. **Setup**: In Commission Setup, enable "Use Annual Sales Tiers" and set the "Annual Sales Calc. Period" (typically -1Y for one year).

2. **Define Tiers**: In Commission Rates, create multiple entries for the same customer/item group combination with different "Minimum Annual Sales" amounts and corresponding commission percentages.

3. **Automatic Calculation**: When a sales document is posted, the system:

   - Calculates the salesperson's total sales amount for the specified period

    - Finds the commission rate with the highest "Minimum Annual Sales" value that is less than or equal to the salesperson's annual sales
    - Applies that commission rate to the transaction

4. **Example**:

    - Commission Rate 1: Minimum Annual Sales = 0, Commission % = 5%
    - Commission Rate 2: Minimum Annual Sales = 100,000, Commission % = 7%
    - Commission Rate 3: Minimum Annual Sales = 250,000, Commission % = 10%

    If a salesperson has annual sales of 150,000, they would receive the 7% commission rate. If they reach 300,000 in annual sales, they would receive the 10% commission rate.

Viewing Annual Sales

You can view a salesperson's calculated annual sales amount in the commission transaction entries and commission ledger entries. This information is stored with each transaction to maintain an audit trail of why a particular commission rate was applied.

Reporting

Commission Statement Report

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Commission Statement**.
2. Set the filters for the report:
    - **No.**: Select a specific statement or leave blank for all.
    - **Salesperson Code**: Filter by salesperson.
    - **Starting Date** and **Ending Date**: Define the date range for the report.
3. Click **Preview** to view the report or **Print** to print it.

Commission Ledger Entries

1. Use the search function (magnifying glass icon or Alt+Q) and search for **Commission Ledger Entries**.
2. Use the filters to narrow down the entries:
    - **Posting Date**: Filter by date.
    - **Document Type**: Filter by invoice, credit memo, or return order.
    - **Salesperson Code**: Filter by salesperson.
    - **Paid**: Filter by payment status.
3. Review the entries to track commission activity.

Troubleshooting

Common Issues and Solutions

Commission Not Calculated on Sales Line

Possible Causes:

- No matching commission rate found
- Customer or item not assigned to a commission group

- No salesperson assigned to the customer or sales document

Solutions:

1. Check that the customer and item have appropriate commission groups assigned.
2. Verify that commission rates exist for the customer/item combination.
3. Ensure that at least one salesperson is assigned to the customer or sales document.

Split Percentages Not Adding Up to 100%

Possible Causes:

- Manual adjustments to split percentages
- Rounding errors

Solutions:

1. Review the split percentages on the sales document or customer.
2. Adjust the percentages to ensure they total exactly 100%.

Email Notifications Not Sending

Possible Causes:

- Email notifications not enabled in Commission Setup
- Email account not configured for the Commission Statement scenario
- Invalid email addresses

Solutions:

1. Verify that "Email Notifications Enabled" is turned on in Commission Setup.
2. Check that an email account is properly configured for the Commission Statement scenario.
3. Validate all email addresses (recipient, CC, BCC) for correct formatting.
4. Ensure the user has proper permissions to send emails.

Preview Posting Not Showing Expected Results

Possible Causes:

- Commission statement not properly configured
- Missing required fields

Solutions:

1. Ensure all required fields are filled in on the commission statement.
2. Verify that the statement contains valid commission lines.
3. Check that the salesperson is properly set up with a vendor number if creating purchase invoices.

For additional assistance, please contact your system administrator or Infotech support.