# iDynamics Commissions - User Guide

# iDynamics Commissions

iDynamics Commissions is the leading app for the handling of commissions in Business Central. If you haven't tried it yet, you can install it from AppSource at no cost, with all its features enabled for any demo company.

If this is **the first time that you use the app**, we encourage you to watch the following video and follow the short tutorial in the first steps section, to get an overview of the basic concepts required to use it.

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# First Steps

## Overview

iDynamics Commissions lets you set up direct commissions based on the combination of items, resources, GL accounts, salespeople and customers, so that commission entries are automatically generated once a sales document is posted. In addition, the app lets you configure sales targets for a date period and generate commissions based on the sales achieved by each salesperson (sales target commissions).

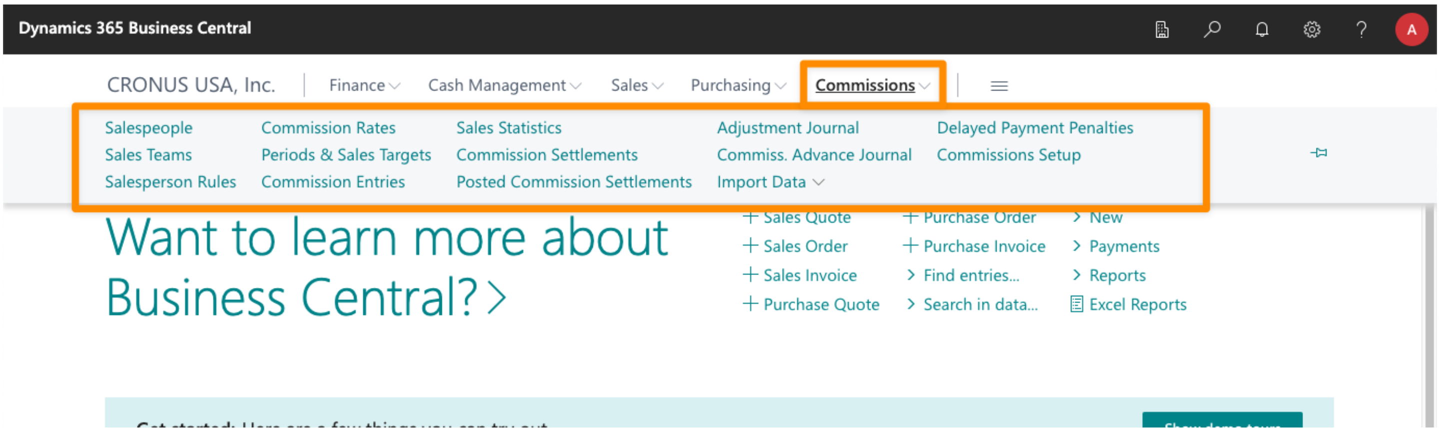
Each sales document can generate commissions for a single salesperson, or be shared between multiple salespeople.

Posting any sales document will generate all corresponding commission entries, which can be settled using settlement documents or purchase invoices (when working with external salespeople).

> **NOTE**
>
> This brief guide should help you start using the app and introduce you to some of the new entities and concepts that it adds to Business Central. We would recommend that you follow the steps detailed in this guide without clicking on any of the links referenced by it and, once you have finished all the steps detailed in it and are a bit more familiar with the app, review it again by clicking on the different links to get a more thorough understanding of the different features offered by the app.

## Welcome

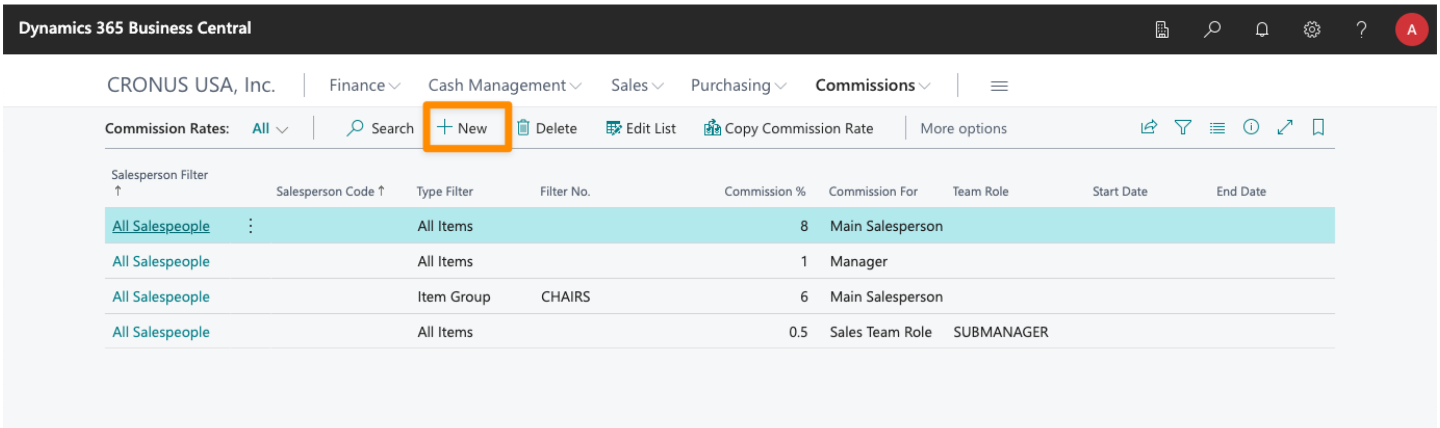
Once iDynamics Commissions is installed, if you are using the Business Manager role center, you will see a new *Commissions* menu appear in the main Business Central menu.




This menu gives you direct access to the main features offered by the app, and we recommend you check all the different options once you have finished this guide.

## Define a Direct Commission Rate

Either from the Commissions menu or by searching for *Commission Rates*, we can access the list of direct commission rates defined for all company sales. To start, you can define a general commission of 2%, with no filters applied.

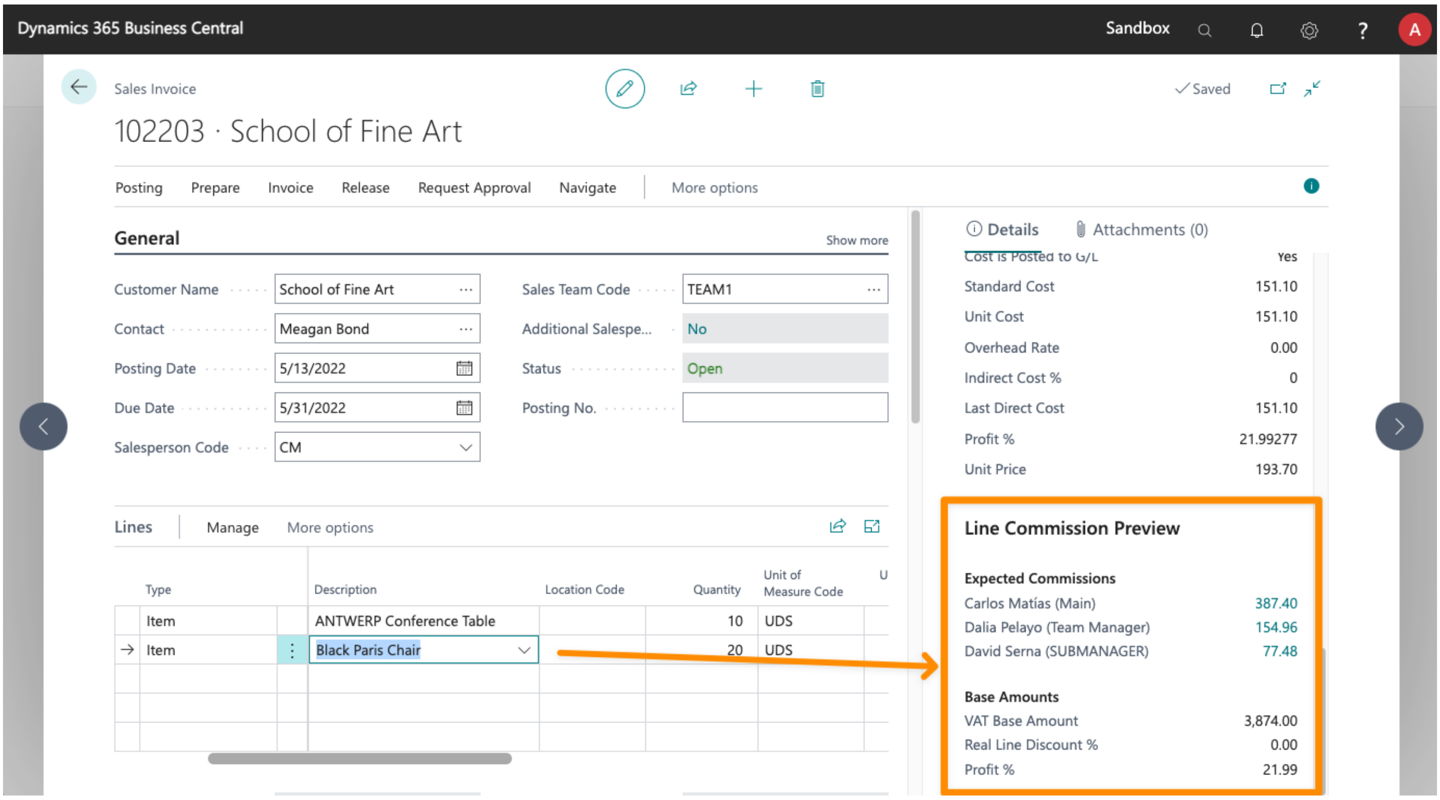



In the previous example, a 2% commission will be generated for all sales. If you wish, you can change the filters, add extra commission rates, or click/tap on the *Edit* action, to see all the available options.

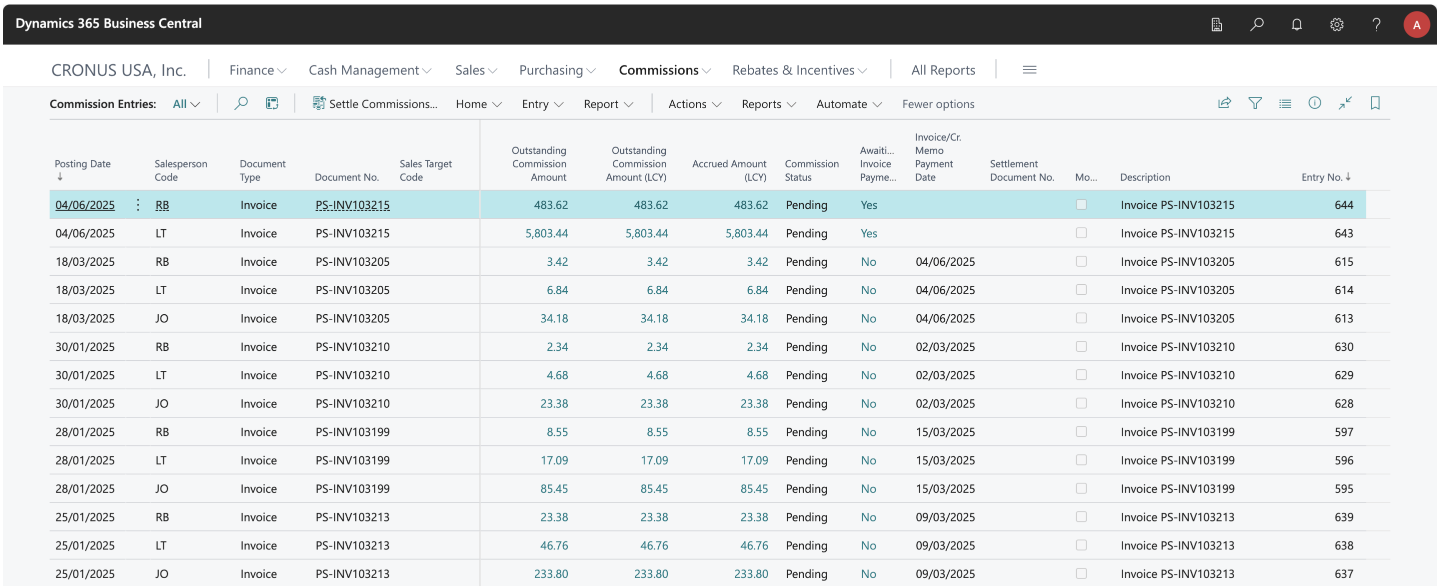
# Create a Sales Invoice

Once a direct commission rate has been defined, we just have to create a new sales invoice, just as we did before installing iDynamics Commissions, in order to generate commissions.

Before you post the invoice, you can run the *Posting > Preview Posting* action, to preview which commission entries will be generated for the document and check the commission amounts or check the Commission preview factbox, which shows the expected commissions for the sales line. We say *expected*, because commissions are generated when the document is posted, and commission rates could change before then.

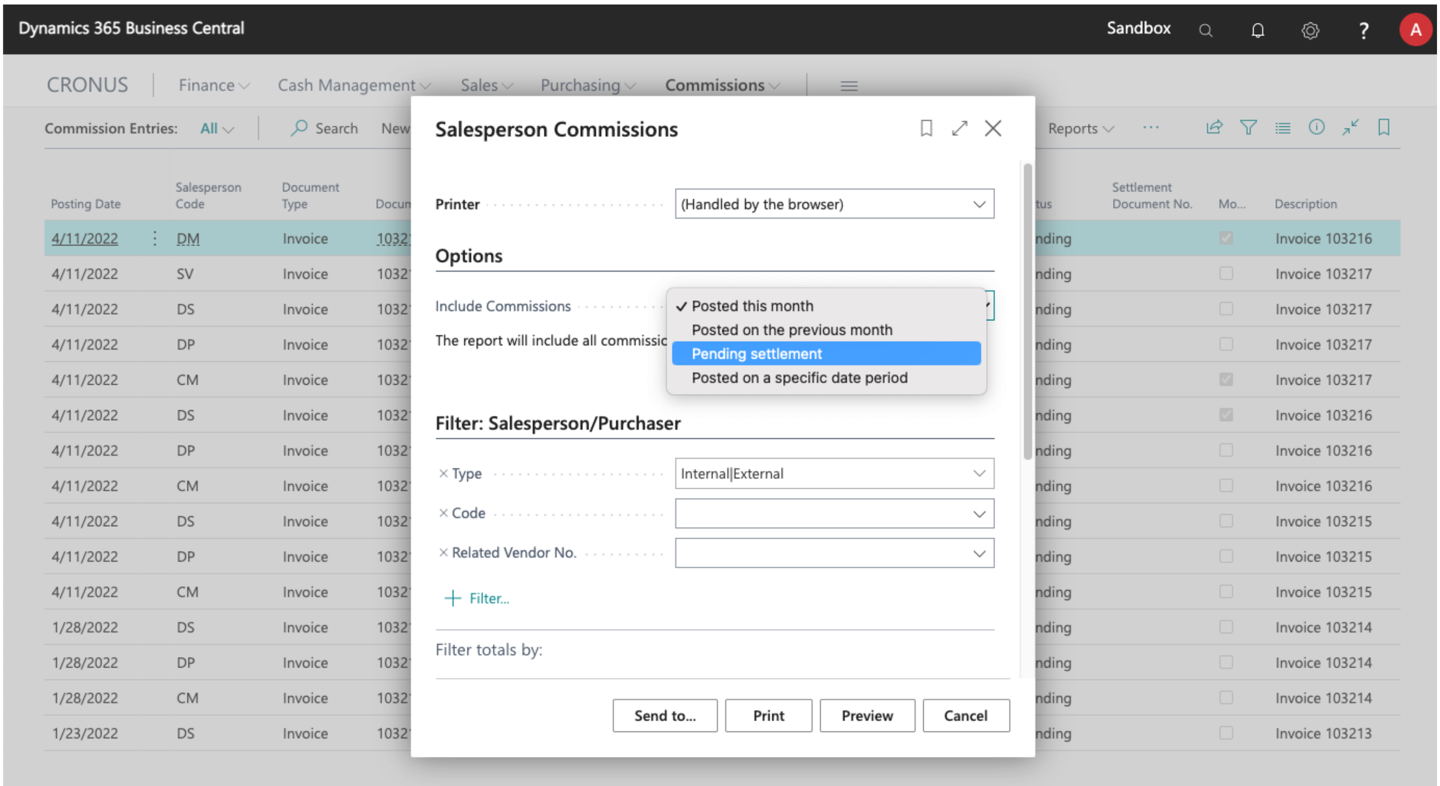



Regardless of whether you *preview posting* or not, once the invoice has been posted, we can navigate to the commission entries list, where we can see, and even modify, the commissions that have been generated according to the commission rate defined in the previous step.

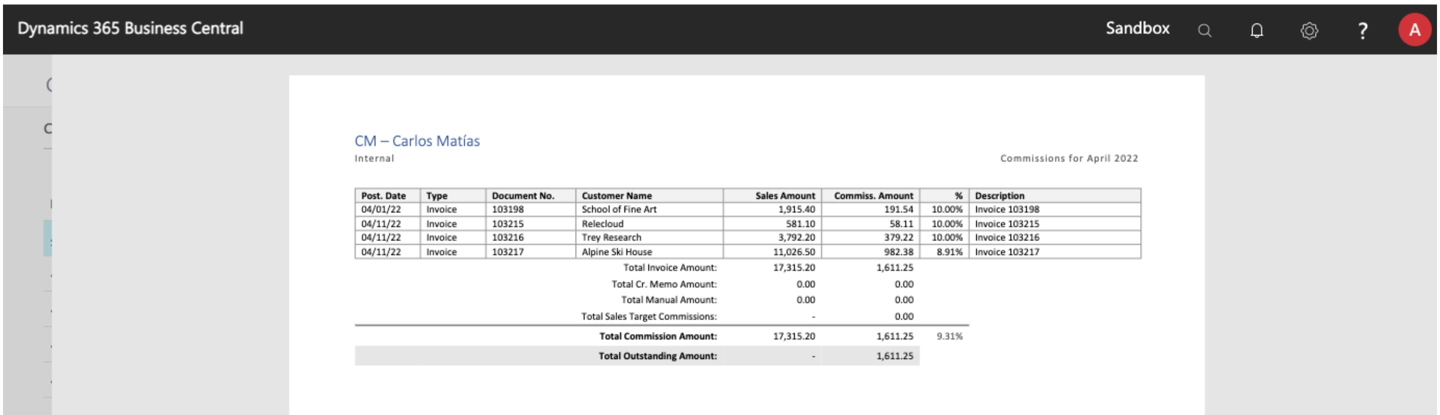



# Commissions Report

From the commission entries list, in the *Report* menu of the action bar, you will find the *Commissions by Salesperson* report, where you can get, for example, the list of commissions that have not been settled yet.




The columns shown in the report by default are just an example of the different values that can be shown in it. There are two designs of the report included in the app, and you can customize it, easily, using Word, so that you can include the columns that you need, and adapt its design to that of your company. Check this link to learn how to customize the commissions by salesperson report.



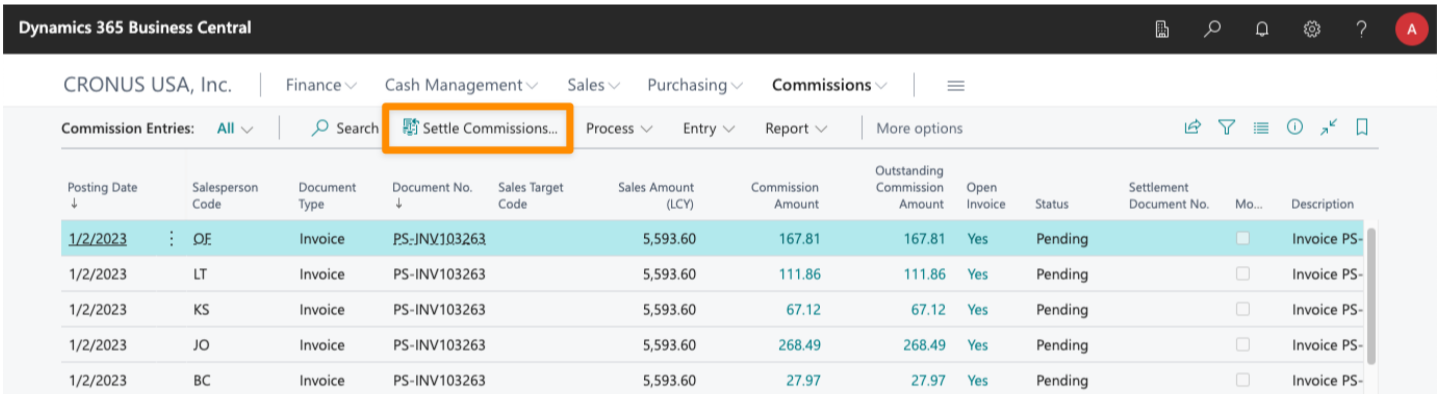

Answers to two frequently asked questions:

- If a salesperson with limited permissions runs this report, only their data will be shown in it (this applies to most reports included in the app).
- For salespeople that don't have access to Business Central, the right dropdown of the *Commissions by Salesperson* action gives you the option to send a copy of the report to every salesperson that has commissions in the selected period (you will see this option also available for other reports).

# Commission Settlements

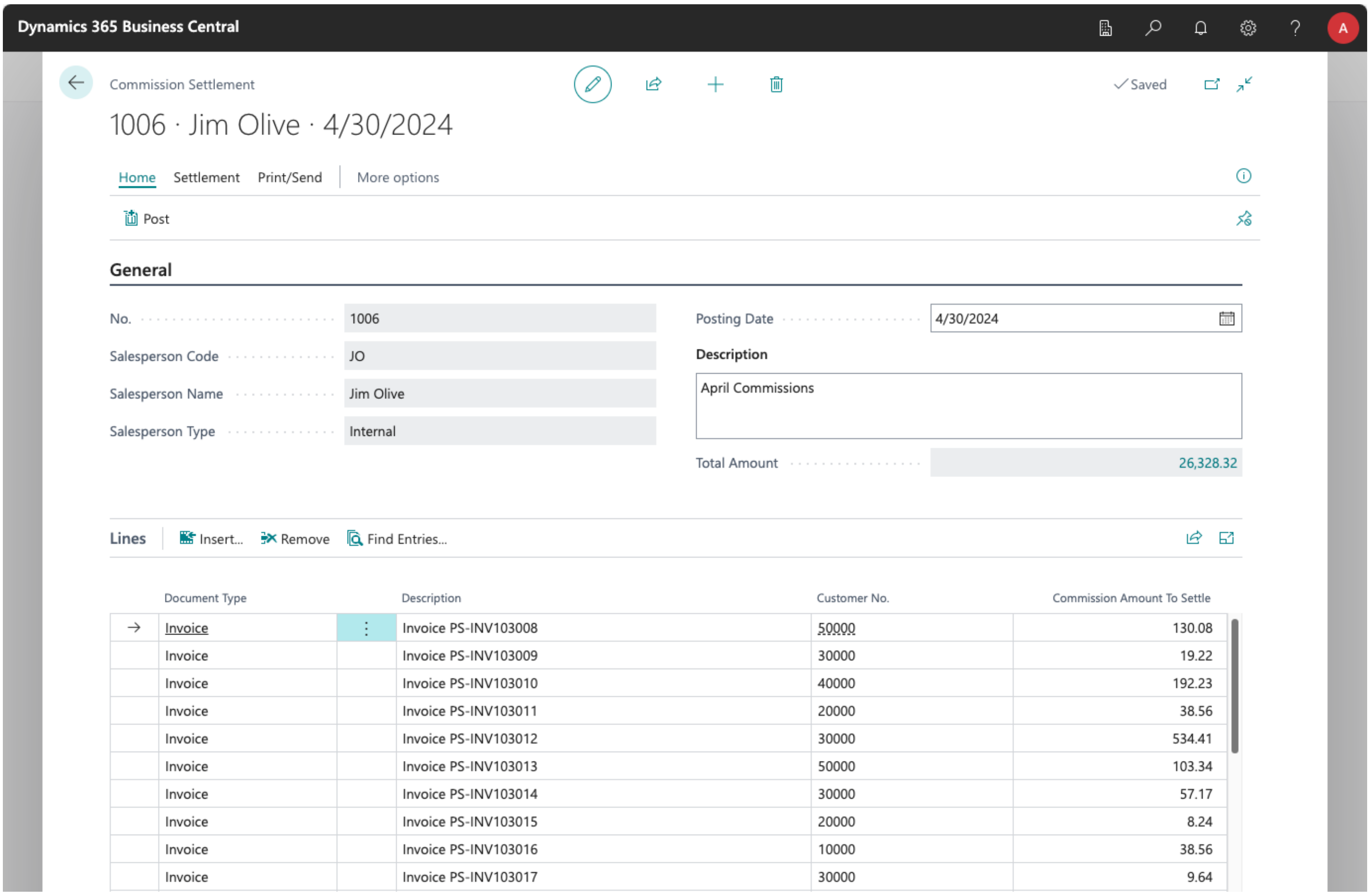
Once commissions have been generated, we can proceed to settle them. In order to do so, we can use settlement documents or purchase invoices. Both will settle the commissions included in them and generate posted settlement documents, the use of one or the other is going to depend on how you want to pay them (either through your internal payroll software or through BC purchase invoices). As we haven't configured anything particular for the salesperson of the sales that we posted before, a settlement document will be used by default.

Settlement documents can be created manually, adding any pending commissions one by one. However, the easiest way to create them is by using the *Settle Commissions...* action, available on the Commission entries list.




This process will let you choose the period for which you want to settle all outstanding commissions and, once it is run, it will generate a settlement document (or purchase invoice) for each salesperson that had outstanding commissions for that month/period. Once the process has finished, a notification will be shown with the number of documents generated, including a link with which you can navigate to them. In addition to using the previous link, you can also use the *Commission Settlements* link, available in the Commissions menu.

Once settlement documents have been generated, you can open any of them to view the invoices/commissions included in them and post them. Once the settlement document has been posted, the whole flow of generating and settling commissions has been completed.




# Next Steps

This guide has been just a brief introduction to one of the most basic uses of the app, but we hope helped you get familiar with some of its main features. Depending on your requirements, we recommend that you:

- Check the general setup options of the app, including whether you want to settle commissions after a sales invoice is posted, or only after the invoice has been collected.
- Define sales teams and assign roles to their members.
- Configure salesperson rules, so that salespeople are assigned based on what or where something is being sold, rather than the actual customer.
- Learn about all the options available when defining direct commission rates, and create some rates that will apply to team managers, for example.
- And of course, learn how to assign multiple salespeople to a single sales document.
- Set a reference period so that you can get sales and commission statistics for it.
- Set sales targets for a period and set commissions based on the targets achieved.
- Explore the different options available that let you handle and update the generated commission entries, including the adjustment journal.
- Check how to give advances/draws on commissions.
- Set commission penalties when an invoice is not paid on time.
- Import commissions or sales stats from an external system.
- Generate or update commissions for existing invoices. One of the easiest ways to try the app is to define a few commission rates and run this process to generate commissions for the invoices already existing in your test environment.

And remember, this is just the beginning of your journey. We recommend that you start slowly by setting a few commission rates, and slowly discover the rest of the features as needed. And don't forget to check the changelog from time to time, to discover all of the features that we keep adding to the app.

Finally, if you need any help or have any questions not answered in this manual, please, do not hesitate to contact us.

# Setup

## Description

Once you have installed iDynamics Commissions, one of the first things that you will want to do is to check our first steps document, and configure the minimum values required to use the app.

In order to try to make this manual easier to follow, chapter-specific configurations will be included in their own chapters. This means that, for example, if you want to know/change how direct commissions are applied, you will find that information in the Direct Commissions chapter. In this chapter, you will have all the configuration values that affect the whole app.

> **TIP**
>
> If you are just starting with the app and browsing through the docs, we recommend you to skip this chapter and come back to it when referenced from other chapters, or when you feel comfortable with the app and want to know more about the different options that let you fine-tune how it works.

## Setup Wizards

iDynamics Commissions has added a few wizards to the Business Central Assisted Setup list to help you set up the app correctly. You can use these configuration wizards, or go through the sections that you will find below on this same page.

Follow our setup assistants

## General Setup

Available from the Commissions menu, the Manual Setup list or the Tell Me... box in Business Central, this setup lets you enable/disable some of the main features, as well as set default values for the app.

Learn more about the different options available

## Commission Groups

Commission groups let you group items, salespeople and customers into groups that you can use when defining direct commission rates or sales targets. These groups can also be used to get reports on sales statistics and detailed commission entries.

Learn more about the commission groups

## Units of Measure

You can give commissions based on each unit sold. For this, the app lets you use the unit of measure of each item/resource, or set a specific unit of measure for commissions.

Learn how to set up a unit of measure specific for commissions

## Posting Groups

If you are going to settle commissions using purchase invoices, you must define at least a G/L account, that will be used when adding commission amounts to the purchase documents.

Learn more about commission posting groups

# Permission Sets

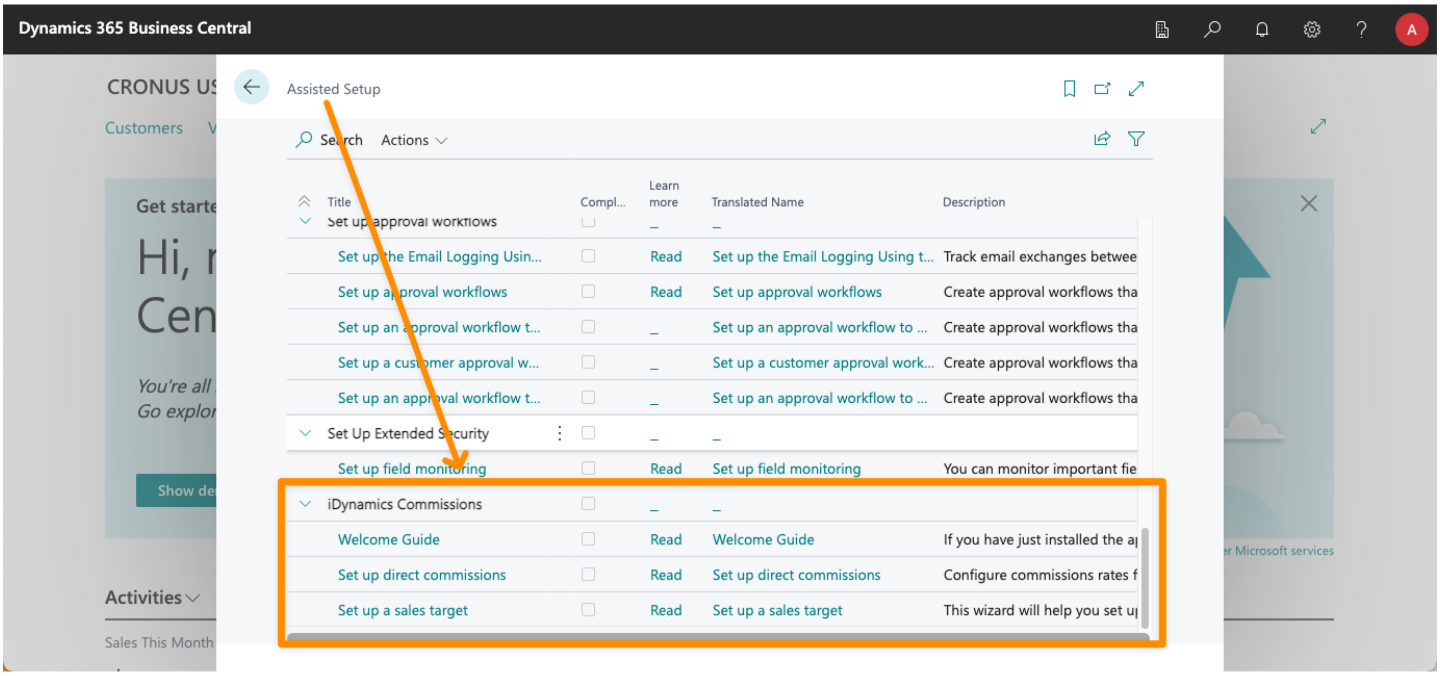
Once installed, iDynamics Commissions adds several permission sets to Microsoft Dynamics Business Central, to let you define which options will be available for each user.

Learn more about permission sets

# Setup Wizards

## Description

iDynamics Commissions adds a few wizards to the *Assisted Setup* list of Business Central, to help you set up the app.




## Welcome Guide

This wizard is run the first time that you install the app and gives an overview of all of the different features included in the app, including links to this manual.

## Set Up Direct Commissions

If you have just installed the app, this guide will help you set up your first commission rates, showing you some of the main options that can be configured for them in the process.

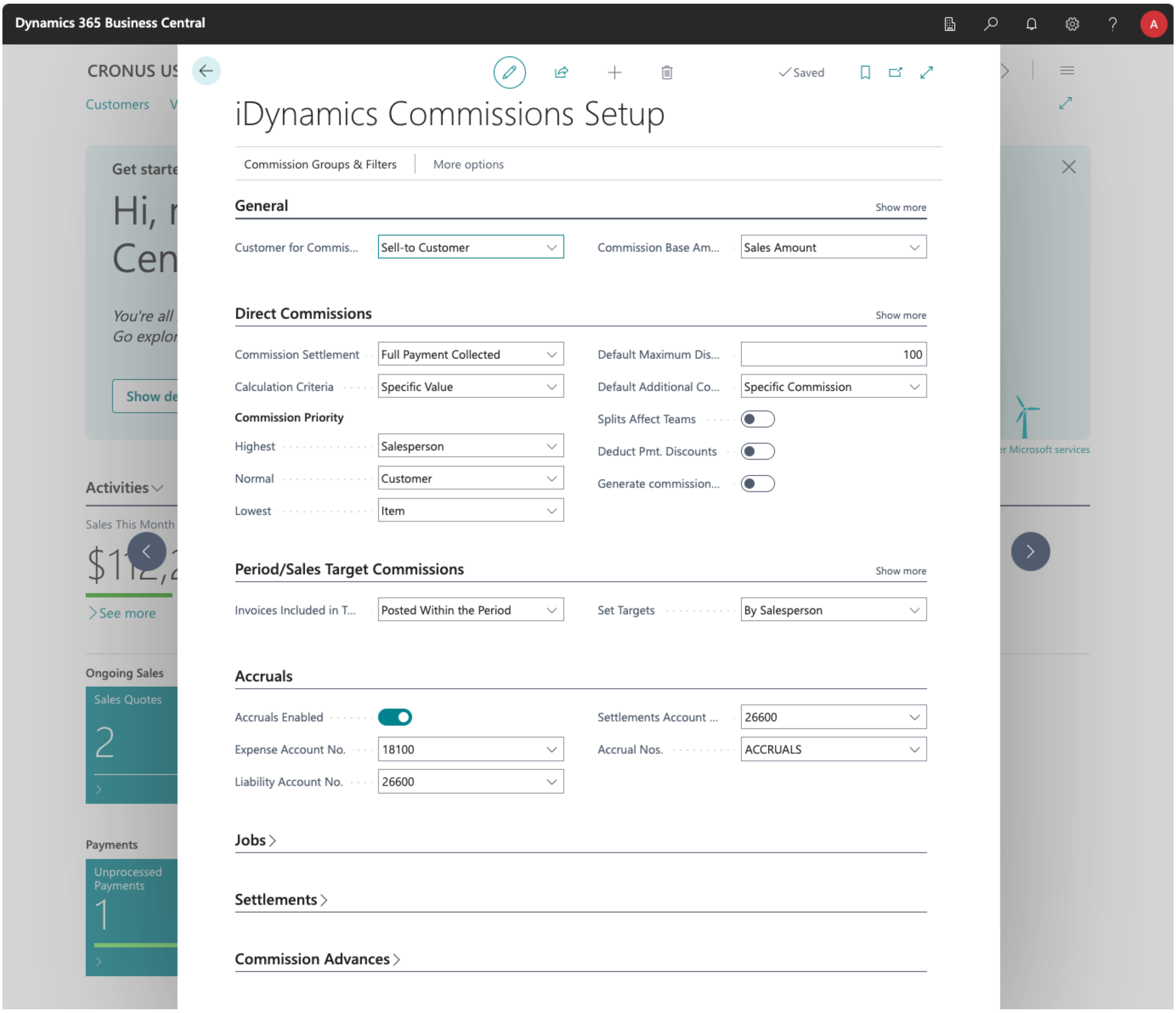
## Set Up a Sales Target

This wizard can be run multiple times to configure sales targets. We know that sales targets offer a lot of different options and we hope that his wizard will help you understand them and define a target that matches your requirements.

# General Setup

## Description

Available from the *Commissions* menu, the Manual Setup list or the Tell Me... box in Business Central, this setup lets you enable/disable some of the main features, as well as set default values for the app.




## General

These options affect how both direct commissions and sales targets will be generated.

- *Customer for Commissions*. When we set rates or targets for a specific customer, this defines whether we are talking about the sell-to customer or the bill-to customer.
- *Base Amount for Commissions*. It defines if commission rates and sales targets, by default, are going to be based on the sales line amount or the actual margin achieved from it.
- *Salesperson by Shipping Address*. The app will override the way that Business Central assigns the salesperson to a sales document: it will always use the salesperson assigned to the Sell-to Customer (instead of the Bill-to Customer), and it will also let you specify a different salesperson for each customer address.

# Direct Commissions

All of the options related to direct commissions are documented in the direct commissions chapter.

# Period/Sales Target Commissions

Here you will find a couple of options related to how the sales target codes are created. When you create a target for a period, a sales target code must be assigned. These codes can be used in different periods, in order to get reports on their performance across periods. By default, you will have to manually create the code if it does not exist, but these options can help you change this:

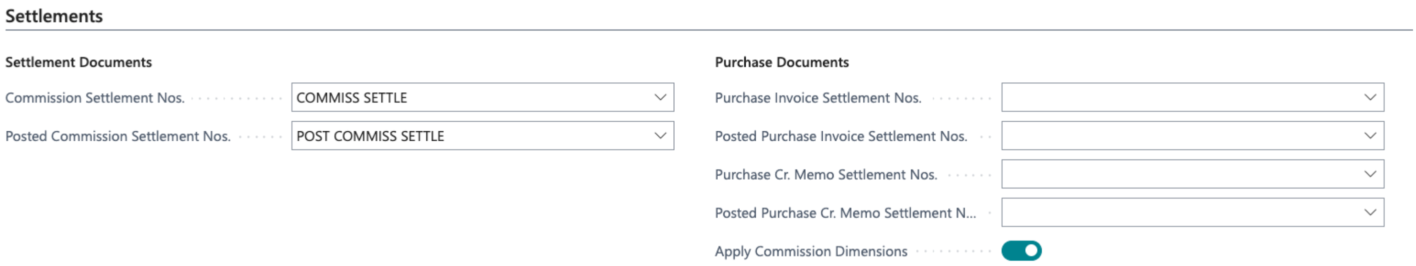
- *Create Sales Target Code on Insert*. When you assign a sales target code that does not exist, it will be created automatically.
- *Skip Prompt to Create Sales Target*. If the previous option is selected, this configures whether a prompt should be shown after the sales target code is created, to enter additional information (e.g. description, default filters).

# Accruals

This section lets you configure commission accruals. Please check the section about commission accruals to learn how to configure them and use them.

# Settlements

When installed, iDynamics Commissions will automatically create number series for settlement documents and posted settlement documents. If you prefer to assign custom series to these documents, here you can change the series assigned to each one.




Optionally, you can also select custom series numbers for purchase invoices, credit memos (and their posted equivalents), so that settlements use a different series from regular purchase documents.

Finally, the *Apply Commission Dimensions* option lets you specify whether dimensions should be copied from each commission entry into the purchase line that settles them.

# Subscription Information

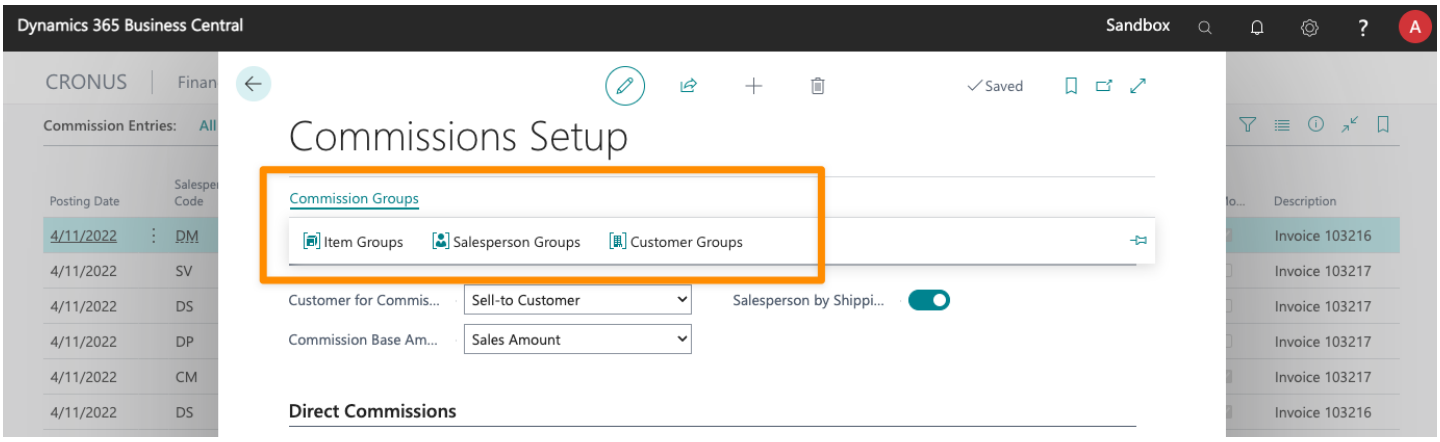
This section shows the current subscription status to the app. You can find more information about the available subscription types, as well as the information shown here, in the licensing chapter.

# Commission Groups

## Description

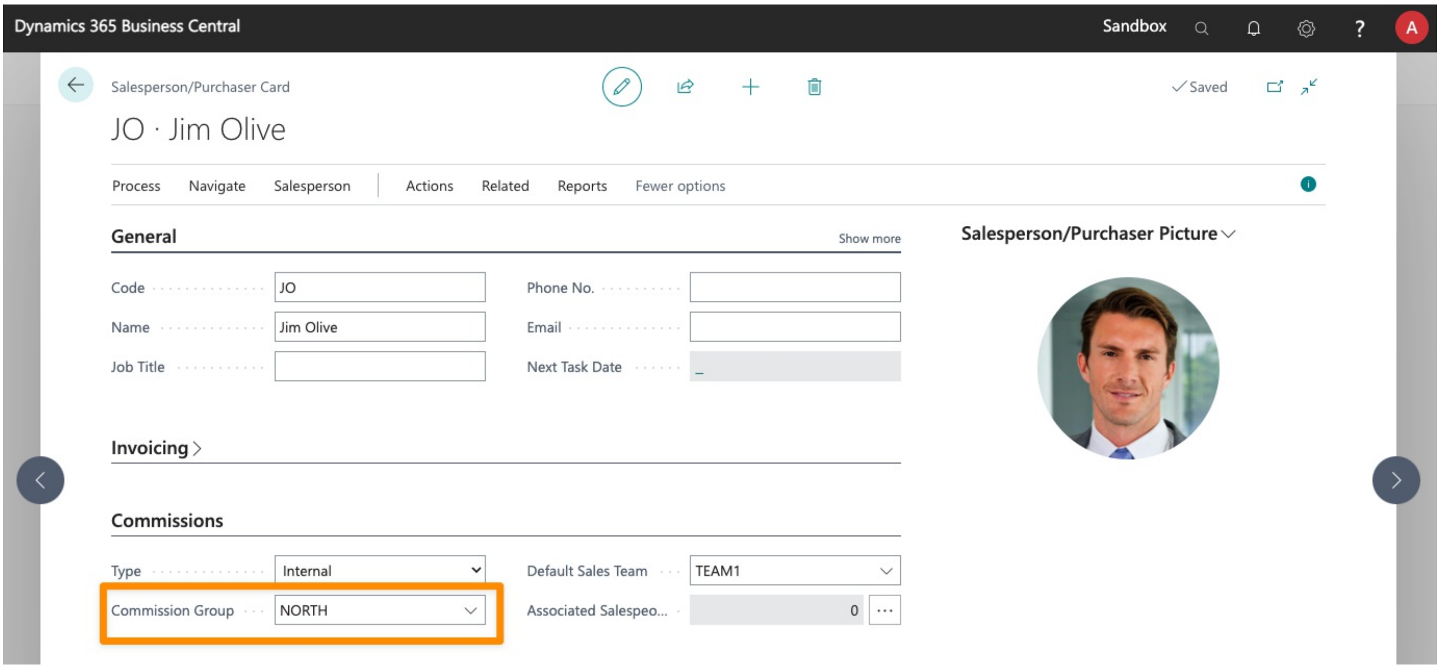
iDynamics lets you define groups of salespeople, customers and items, and configure commission rates or set sales targets based on these groups.

These groups can be configured as needed, from each salesperson/customer/item card, or using the actions available on the main setup page.



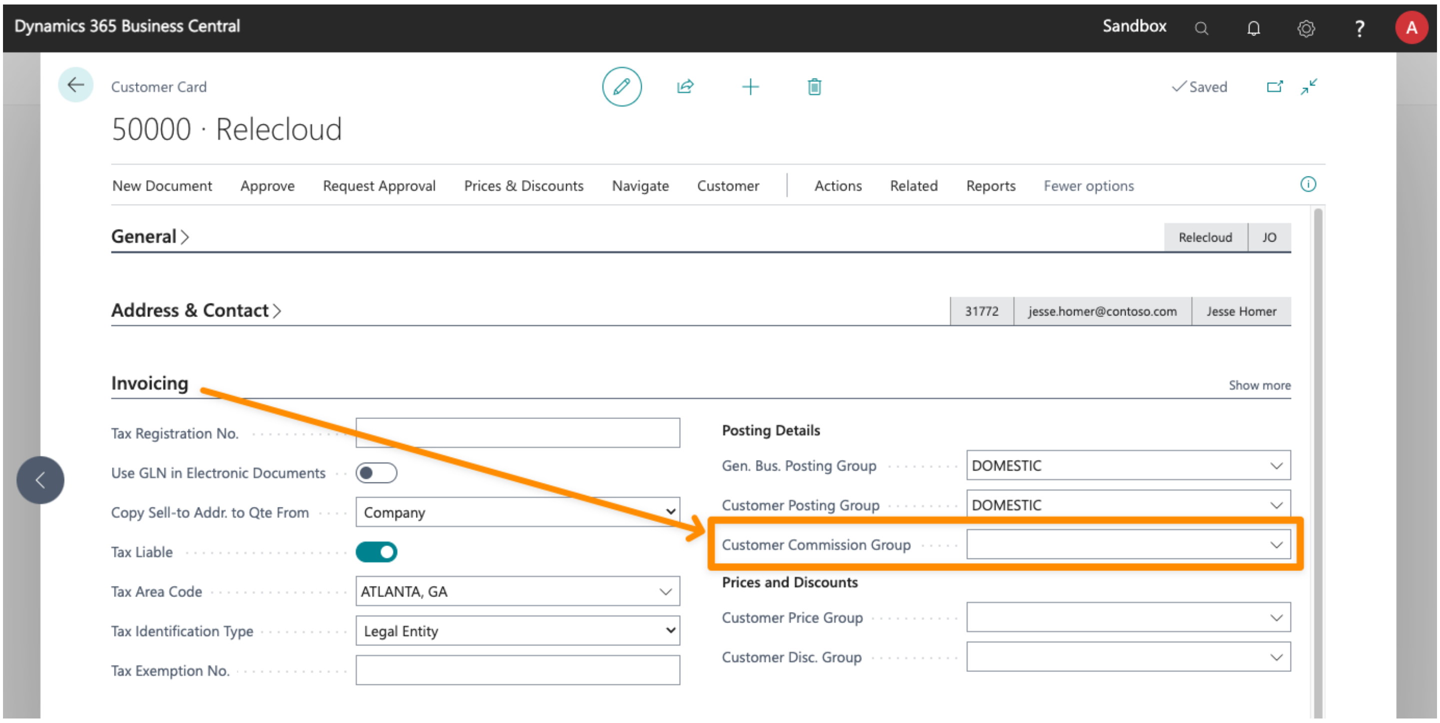

## Salesperson Commission Groups

This is used to define a group of salespeople who share commission rates. You can assign salespeople to a group by using the *Commission Group* field in their Business Central card.



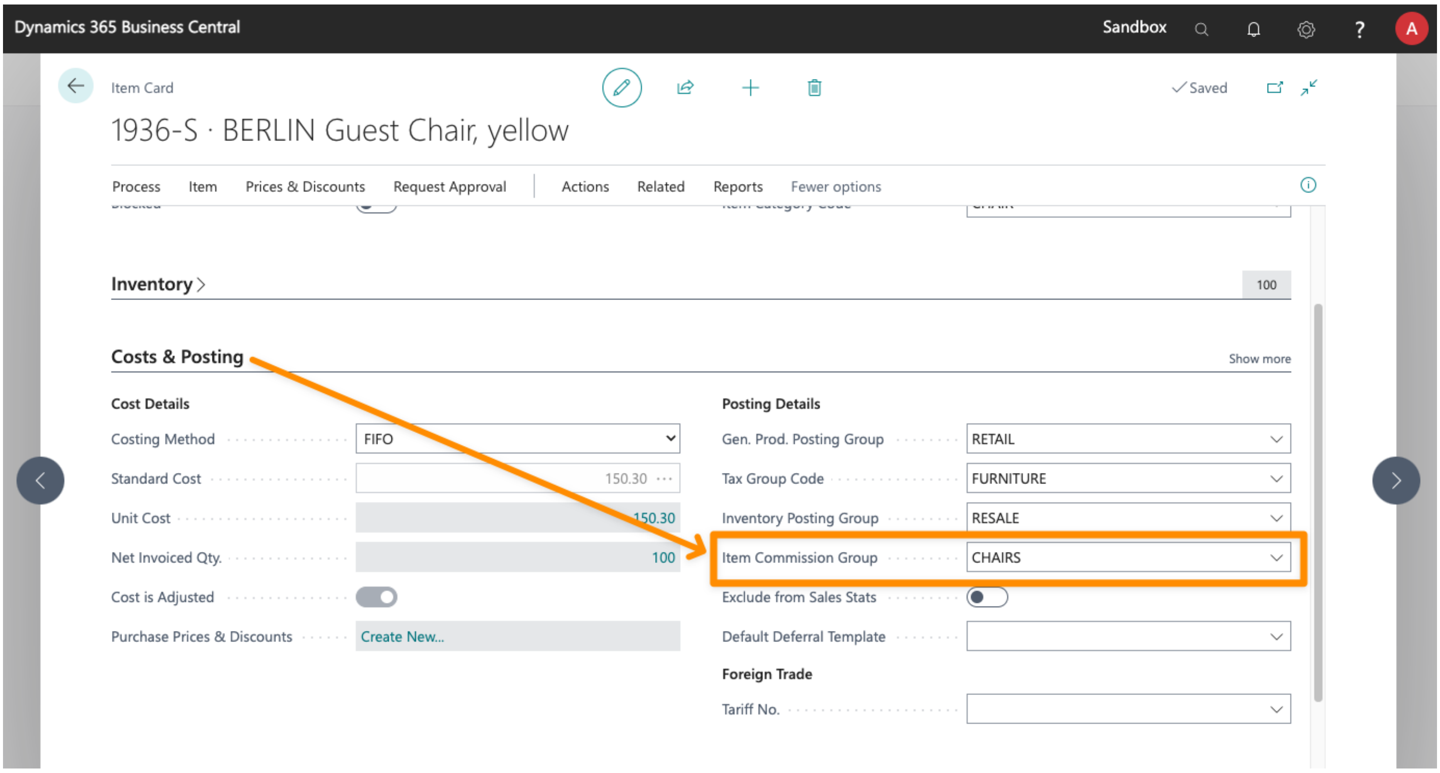

## Customer Commission Groups

This is used to define a group of customers that share commission rates. You can assign customers to a group by using the *Commission Group* field that you will find in the *Invoicing* area of the customer card.




## Item Commission Groups

This is used to define a group of items that share commission rates. You can assign items to a group by using the *Item Commission Group* field in the *Costs & Posting* area of their Business Central card.




## Item and Customer Templates

The commission group can be added to both item and customer templates so that you can quickly create new records with the correct commission group preassigned.

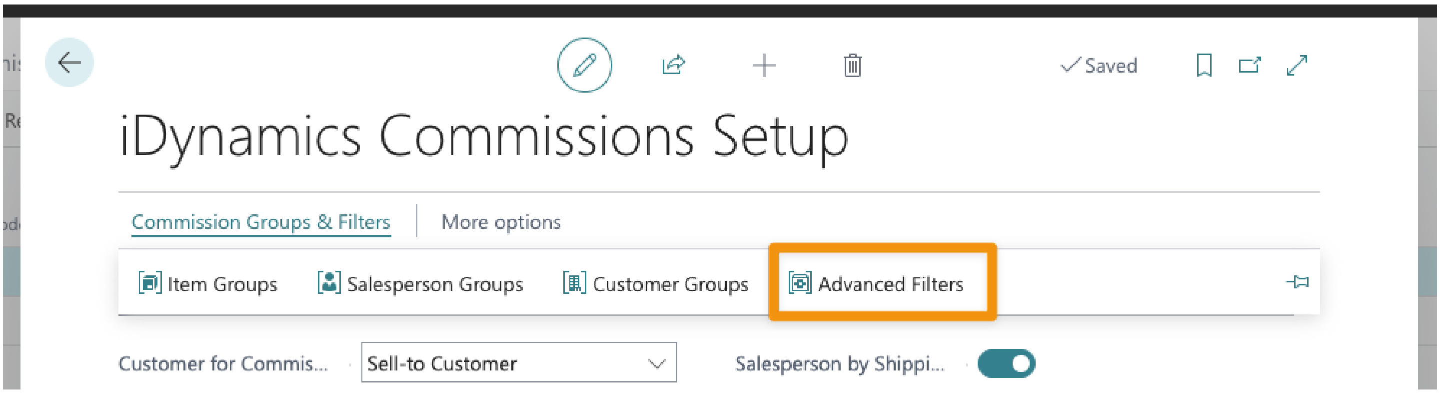
# Advanced Filters

## Description

Advanced filters give you extra flexibility when defining commission rates or sales targets. You can manually combine (or exclude) specific items, commission groups, G/L accounts, etc. to cover scenarios such as the following:

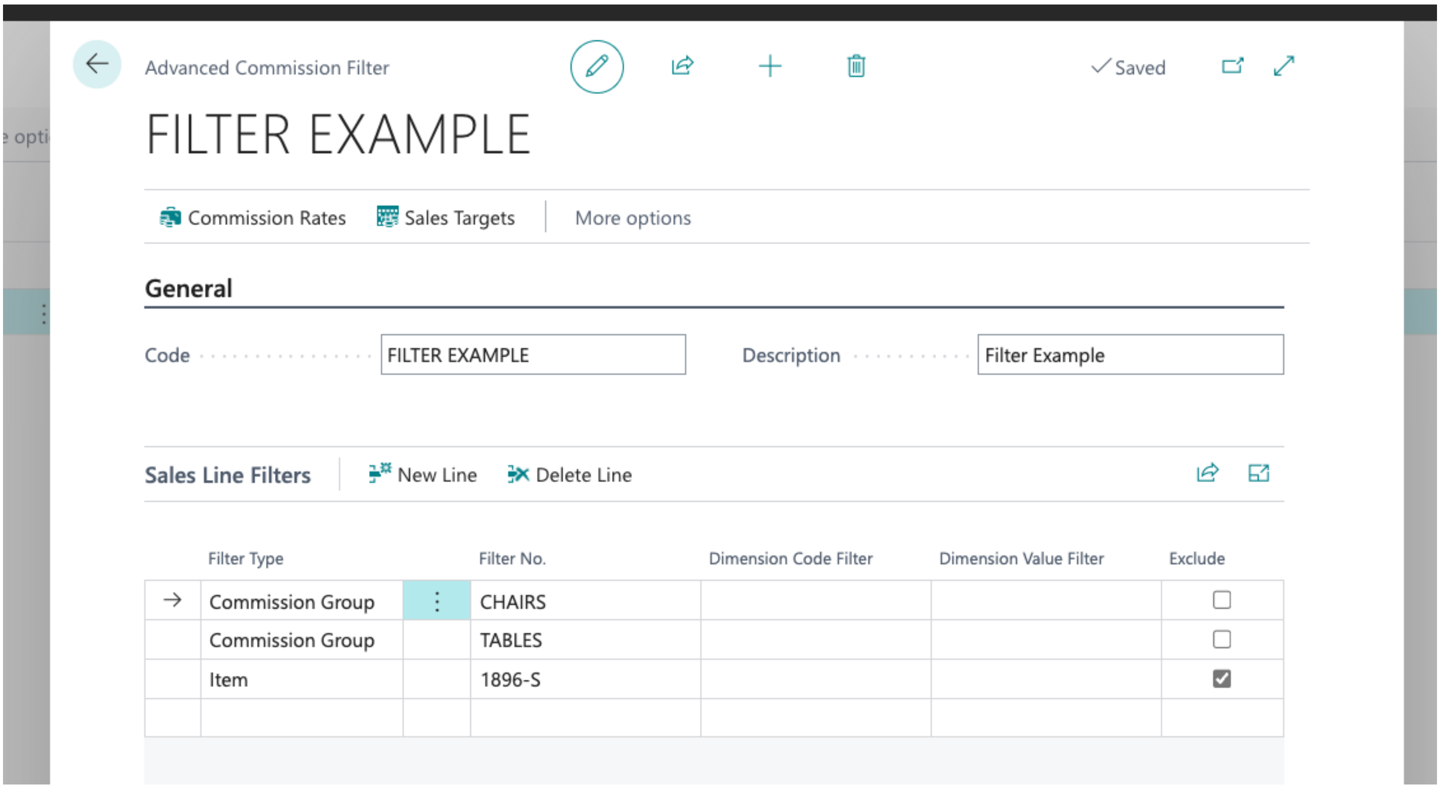
- Define a commission rate that only applies to a specific list of items (that are not related through a group).
- Define a commission rate that applies to several item/commission groups.
- Define a commission rate that applies to several dimension values of a particular dimension code.
- Define a commission rate that applies to all items in a group... with a couple of exceptions.

You can create new filters directly from a commission rate, or sales target, when you select Advanced Filter as the filter for the sales lines to include, or from the action bar of the Commission Setup page.




## Include or Exclude Elements

When you create an advanced filter, you can add as many items, resources, G/L accounts, commission groups, etc. as needed, selecting whether they should be included in the filter (which is the default option) or whether they should be excluded.




In the previous example, the filter will include all elements assigned to the *CHAIRS* or *TABLES* commission groups, but it will explicitly exclude the item with no. *1896-S*.

You could even define filters that include all items (or all types of sales lines), but exclude just a few specific references if needed.

# Commission Unit of Measure

## Description

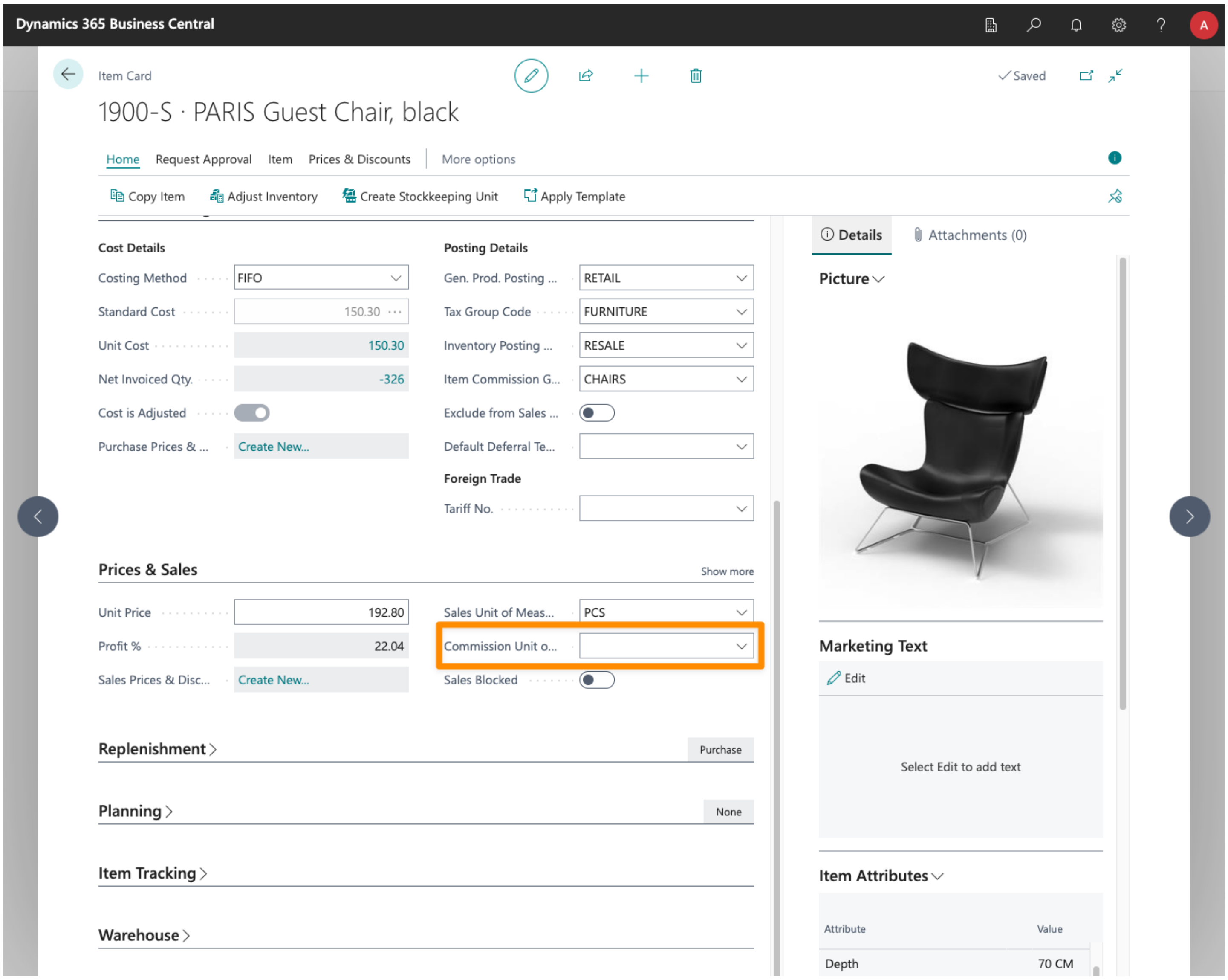
When selling items or resources, or when setting sales targets for them, you might want to set a fixed commission amount for them, or you might want to give commissions based on the number of units sold during a period.

For these cases, the app lets you configure a commission unit of measure for each item and resource.

> **NOTE**
>
> If you don't specify a commission unit of measure, the sales unit of measure will be used instead. And if no sales unit of measure has been specified, then the base unit of measure will apply. This field is just needed for those cases in which the sales unit of measure is not the one you want to use to define rates or targets.

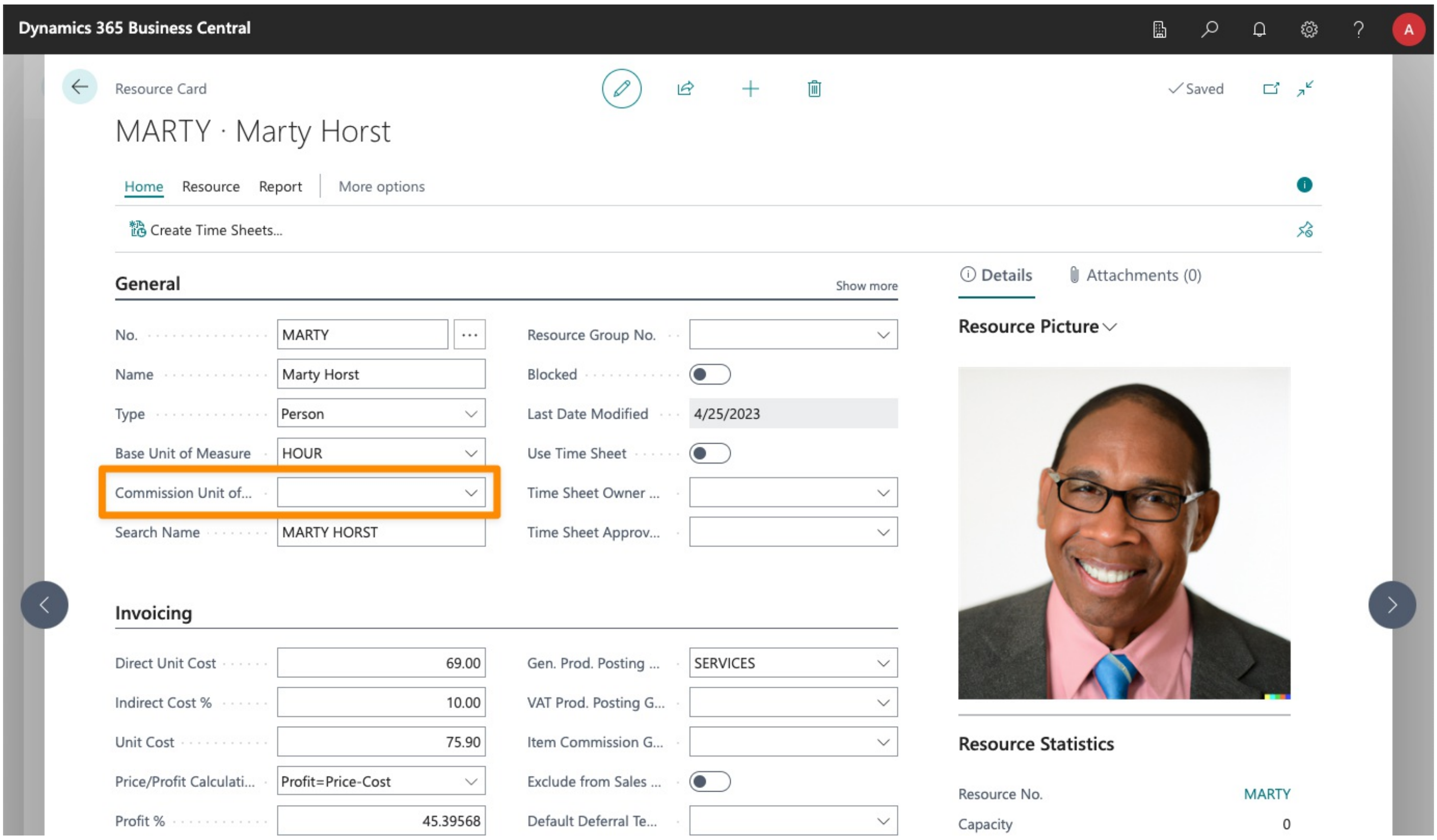
## Items

You can find the field in the *Prices & Sales* tab of the item card.




## Resources

You can find the field in the *General* tab of the resource card.




As there is no sales unit of measure for resources, if no commission unit of measure is specified, the base unit of measure will be used instead.

## G/L Accounts

As G/L accounts don't have a unit of measure assigned to them, any commission rates or sales targets that include them will always use the quantity specified for them in each sales line.

# Sales Territories

## Description

Sales territories can be used to split customers into different areas, and assign salespeople based on the area in which they are located, instead of assigning the salesperson manually to each customer.

## Setup

The *Territories* table is a standard Business Central table, and iDynamics Commissions extends the app so that you can assign a territory to:

- Customers
- Ship-to Addresses
- Post Codes
- Country/Regions
- Areas

## Sales documents

In the case of sales documents, the app will assign the territory automatically when you change the ship-to address of the document. To do that, the app will check, in this order:

- If the ship-to address has a territory assigned (if not using the default ship-to address for the customer).
- If the ship-to post code has a territory assigned.
- If the ship-to country/region has a territory assigned.
- If the customer has a territory assigned.
- Repeat the first three steps using the sell-to address.

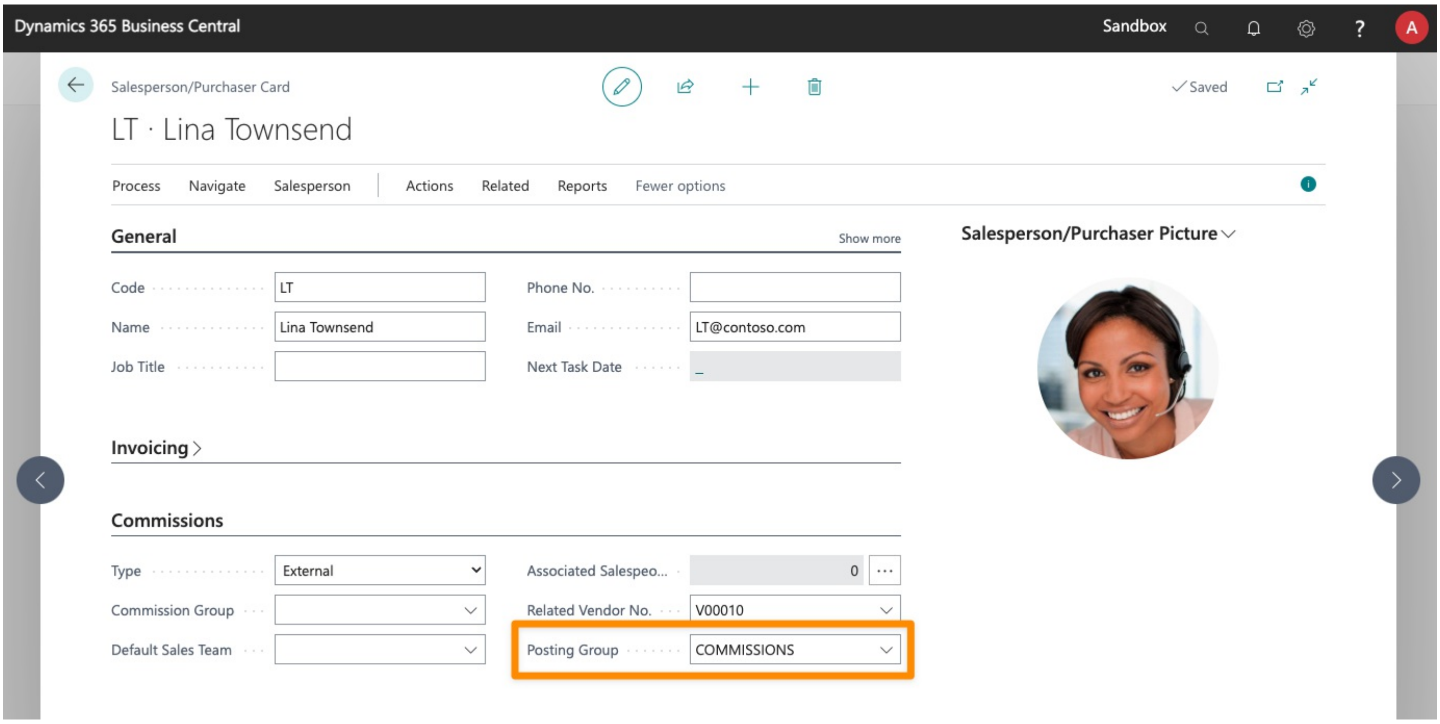
This means that, for example, if your company divides territories based on the country/region where the sale is done, you could assign a territory to each country/region, and the app would assign it to each sales document automatically.

# Salesperson Posting Groups

## Description

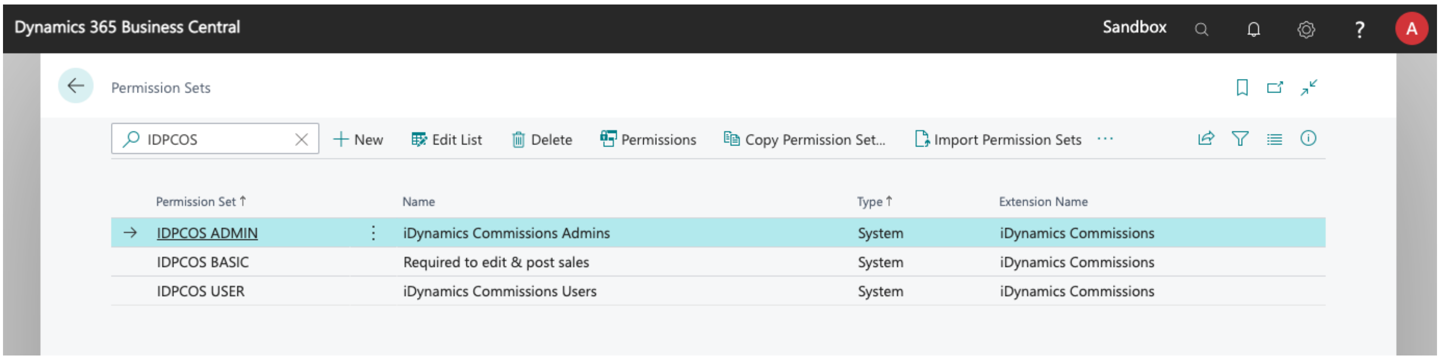
If we have external salespeople, whose commissions are settled by means of purchase invoices, it will be necessary to define at least one group, to set the G/L account to which the invoice lines will be assigned.

When you configure an external salesperson, on their salesperson card you can configure the salesperson posting group that will be used, and create/configure it if needed.



# Permission Sets

Once installed, iDynamics Commissions adds three permission sets to Microsoft Dynamics Business Central, in order to let you define which options will be available for each user.




## Main Permission Sets

For most users, these are the only permission sets that will be needed, and they are automatically assigned to the standard *D365 BASIC*, *D365 TEAM MEMBER* and *D365 BUSS FULL ACCESS roles*, so you might not even need to manually assign them.

### IDPCOS BASIC

If direct commission rates have been configured, this permission set is the minimum required for any user who needs to be able to post sales documents. This role lets the user generate commission entries when a document is posted. Users without this role would get an error.

In addition to that, users with this role that are linked to a salesperson (using the *User Setup* Business Central page), will be able to run most of the application reports, always filtered to show only their own data.

Users with this role will not have access to commission entries or settlements, and they will not be able to run any reports that include data from other salespeople.

> **NOTE**
>
> These permissions are automatically applied to users with the *D365 Basic* and *D365 TEAM MEMBER* permission sets.

### IDPCOS ADMIN

This permission set lets you use all features of the app, as well as access all data generated by it.

> **NOTE**
>
> These permissions are automatically applied to users with the *D365 BUS FULL ACCESS* permission set.

## Advanced Permission Sets

These permission sets will be useful if you want to give more granular access to the different features of iDynamics Commissions.

### IDPCOS READ COMMISS.

This permission set can be used to give access to a user who can see commissions (and sales stats) but not modify them.

### IDPCOS SEND EMAILS

You can add this role to a user that has the *IDPCOS READ COMMISS.* permission set so that they can email reports to your salespeople.

#### IDPCOS SETTLEMENTS

This role can also be added to someone with the *IDPCOS READ COMMISS.* permission set. They will be able to generate and post commission settlements.

#### IDPCOS EDIT ADDIT.

This role will give the user permission to edit the list of additional salespeople assigned to a sales document, customer, ship-to address, or salesperson. Note that, in order to be able to edit this list, they need to be able to edit the manual commission % (and base amount), when needed, so they will be able to see any commission that has been manually assigned to a document through this table, even if they can't preview the whole commissions for the document, or see the posted commissions.

#### IDPCOS USER

Users with this permission set will have full access to all features of the app. They will be able to set up direct commission rates and sales targets, they will be able to view *and modify* all generated commissions, and they will be able to create settlement documents.

The only restriction for users with this role, compared to the *IDPCOS ADMIN* role, is that they will not be able to change the general setup parameters.

## Other Permissions

#### Hide Settlement Purchase Invoices

Users with permission to read purchase invoices in Business Central will be able to access any purchase invoice used to settle commissions for external salespeople.

If you have salespeople who can access purchase invoices, but you do not want them to be able to see those that belong to commission settlements, use security filters so they can only see purchase headers, invoices and credit memos that have the *IDPCOS Settles Commissions* field set to false.

#### Give Access to View Own Commissions

As mentioned in this document, by assigning a Salesperson Code to a user in the standard *User Setup* table, in Business Central, they will be able to run reports that show their own commissions, and preview commissions for themselves.

If you also want to give them access to view the commission entries assigned to them, you can copy the *IDPCOS READ COMMISS.* permission set, and use security filters so that the *IDPCOS Commission Entry*, *IDCOS Detailed Commiss. Entry* and *IDPCOS Detailed Sales Stats* tables are filtered by their *Salesperson Code*.

# Salespeople Setup

iDynamics Commissions extends the basic setup options included in Business Central, as well as the options available when assigning salespeople to sales documents. This section of the manual is divided into the following areas:

## Setup Salespeople

How to define managers/sales teams and how to set up internal salespeople (employees in the company payroll) and external salespeople, whose commissions will be settled using purchase invoices.

Learn more about the different options available in the salesperson card

## Salespeople Assignment

iDynamics Commissions lets you replace the standard logic that Business Central uses to assign a salesperson to each sales document so that, for example, you can set a different salesperson based on the ship-to address.

Learn more about how salespeople are assigned to sales documents

## Salesperson Rules

Sometimes you might not want to assign salespeople based on the specific customer assigned to the sales document, but to the actual item being sold, or maybe to the area in which the customer (or its ship-to address) is located.

Learn more about salesperson rules

## Additional Salespeople

You can set additional salespeople for a salesperson, a customer, or a ship-to address. This will let you share commissions with them when a sale is posted.

Learn more about assigning multiple salespeople at once

## Update Assigned Salespeople

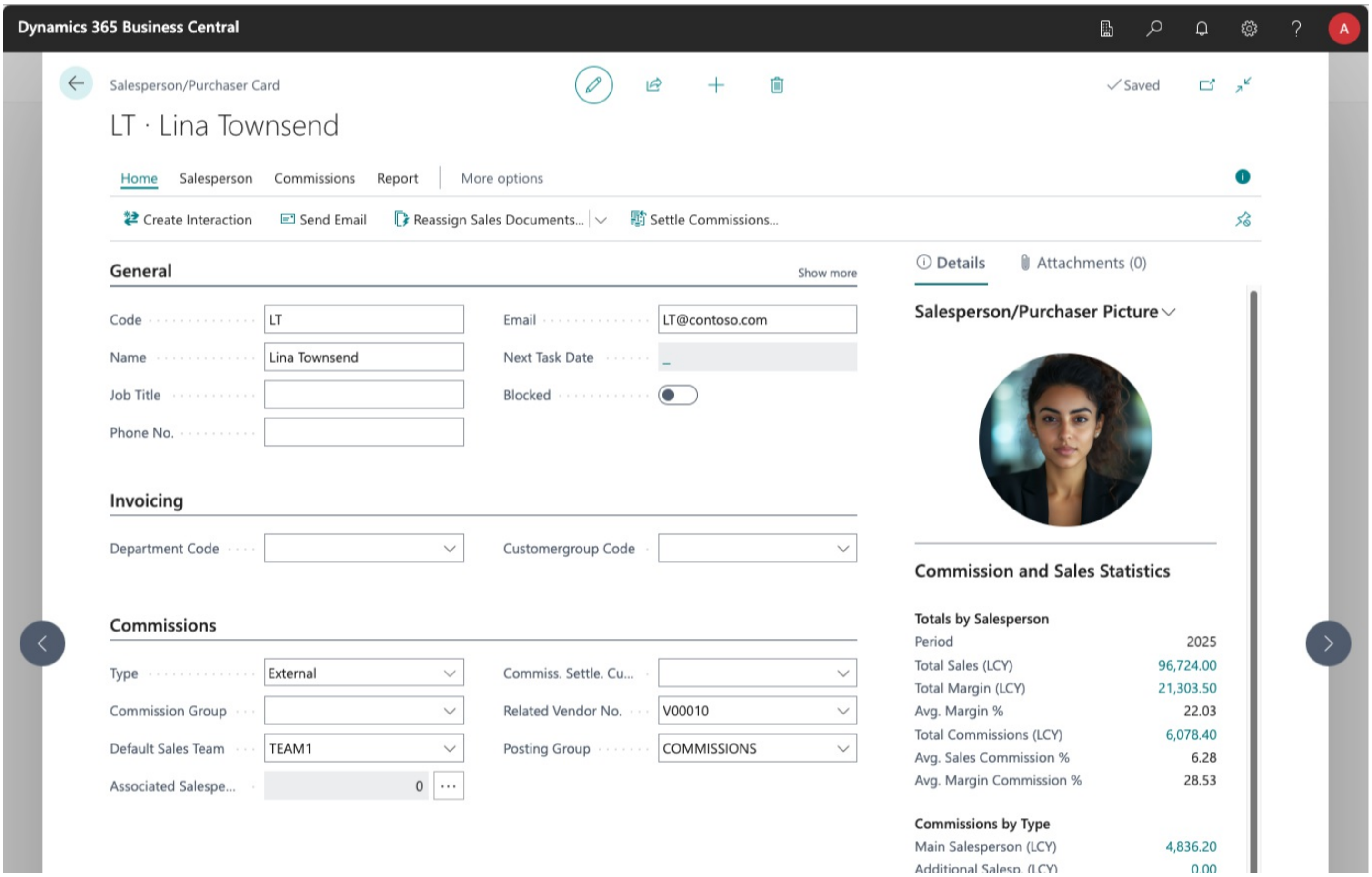
iDynamics Commissions includes tools to help you replace a salesperson and/or update the salesperson assigned to active sales documents.

Learn more about handling salesperson changes

# Salespeople Setup

## Salesperson Card

Within any salesperson card, you will find a new group of fields that will affect the way in which commissions are generated.




These are the available fields:

- **Type**. Salespeople can be external or internal. The main difference is that commissions for external salespeople can be paid through purchase invoices, in addition to the settlement documents included with iDynamics Commissions.
- **Commission Group**. This group will be used when checking commission rates for a particular document, as well as when setting sales targets.
- **Default Sales Team**. A salesperson can be a member of several sales teams. This field specifies which one will be used, by default, when they are assigned to a sales document.
- **Associated Salespeople**. You can assign one or several salespeople that will share the commissions of the selected salesperson.
- **Commiss. Settle. Currency**. You can specify a currency if you want to pay commissions in a currency different from the local one.

For salespeople of type *external*, two extra configuration fields are available:

- **Related Vendor No.**. You will be able to add commissions for this salesperson to any purchase invoice assigned to this vendor. Multiple salespeople can be assigned to the same vendor.
- **Posting Group**. This group sets the G/L account to which the invoice lines will be assigned.

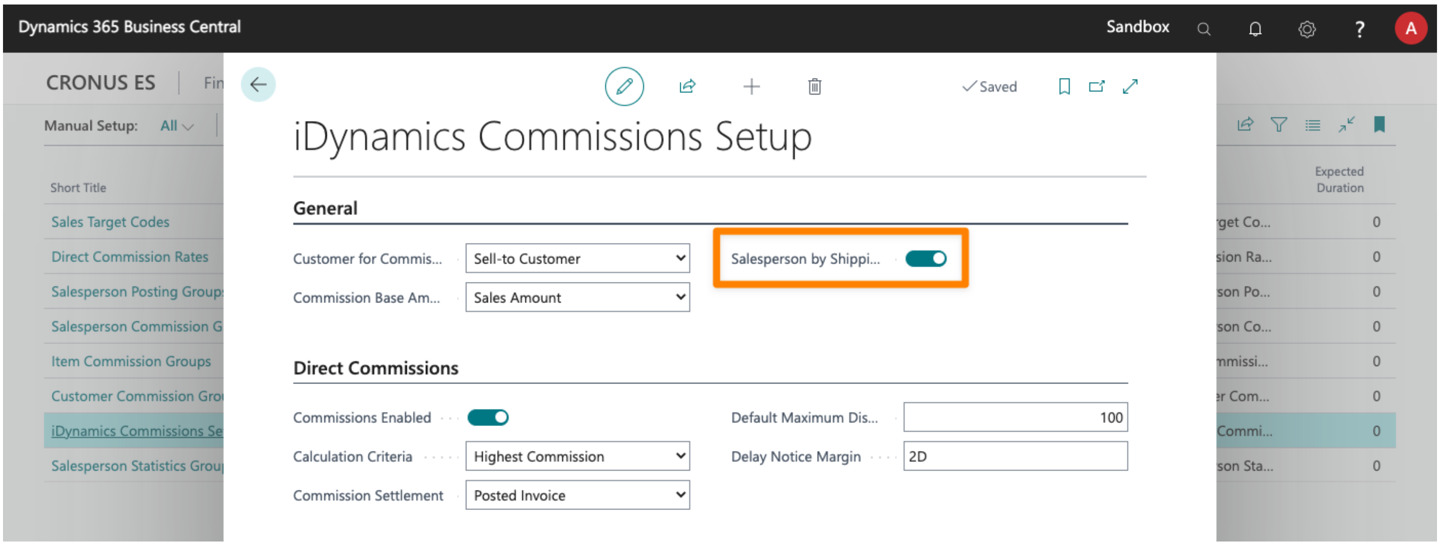
Both of the above-mentioned fields are optional, but paying commissions through purchase invoices will not be possible unless both are properly configured.

# Salesperson Assignment

## General Setup

iDynamics Commissions extends Business Central to let you set up a different salesperson not just for each customer, but for each ship-to address.

This can be enabled or disabled from the main configuration page.

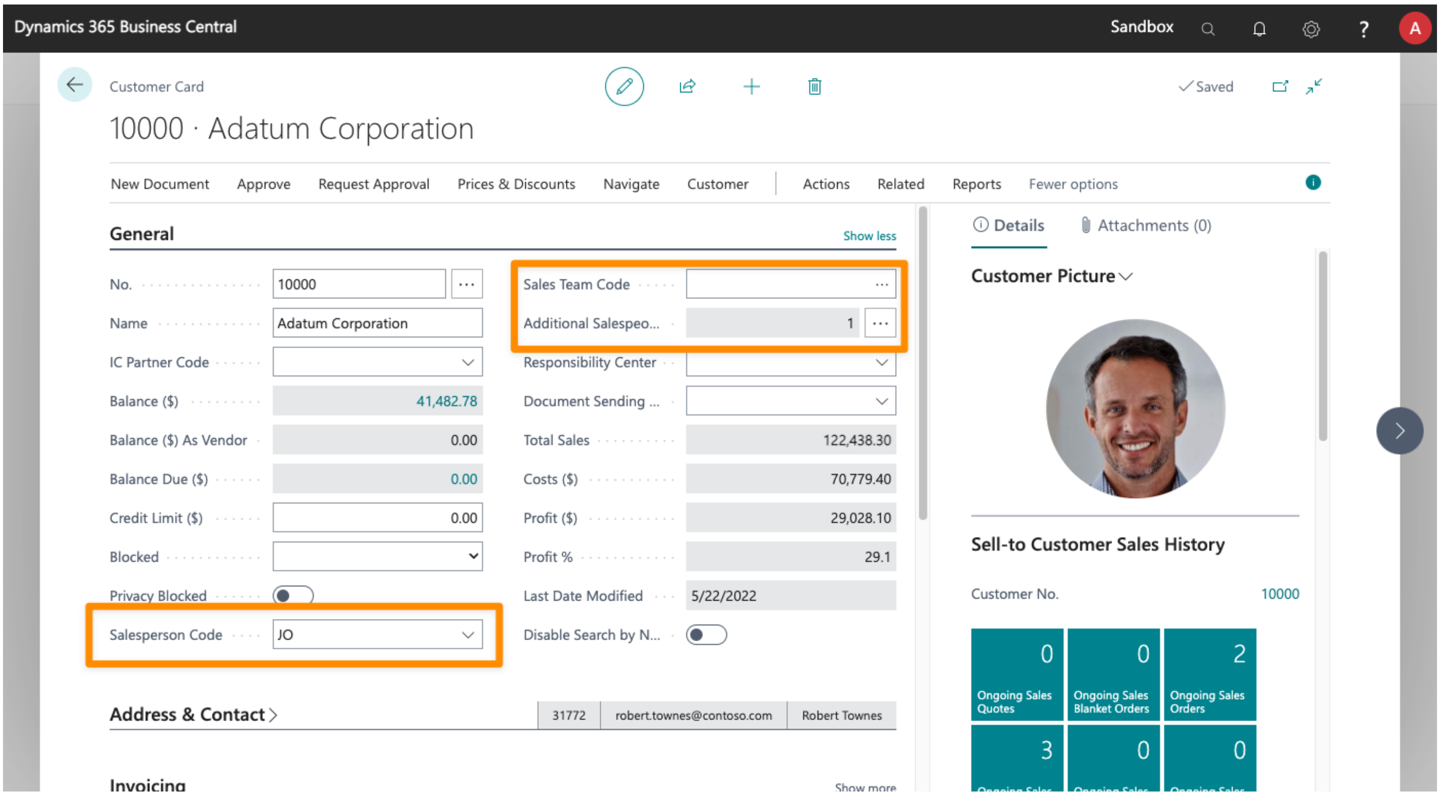



If enabled, the app will let you set a different salesperson for each customer ship-to address. In addition to that, **the salesperson assigned to the sell-to customer will prevail over the salesperson assigned to the bill-to customer**. This means that this feature might be useful even if no salespeople are assigned to ship-to addresses.

## Salespeople assigned to a customer

Main Salesperson

By default, Business Central lets you assign a salesperson to each customer on their card, and iDynamics Commissions uses that value, regardless of whether the *Salesperson by Shipping Address* option has been enabled or not.

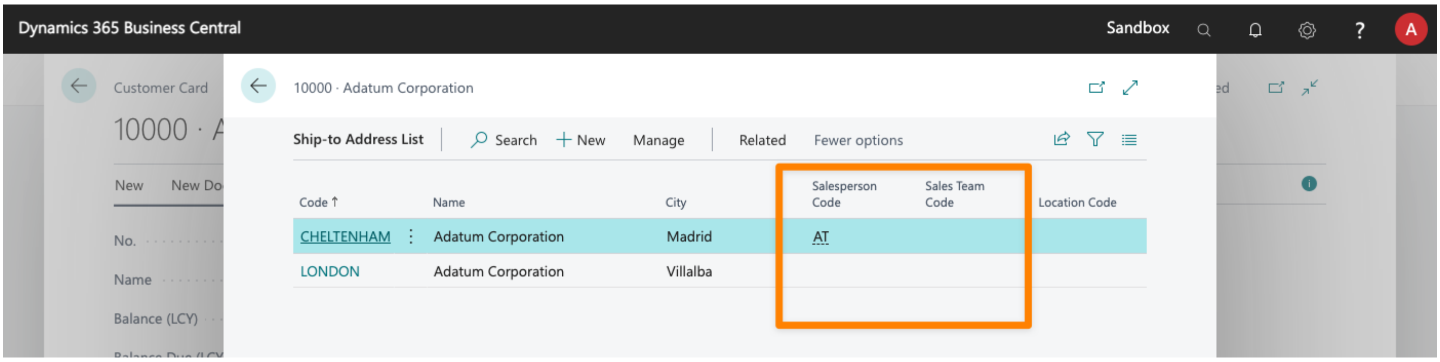



More than one salesperson can be assigned to the customer, though, using the Additional Salespeople field. Additionally, you can specify a sales team for the customer. If no sales team is selected, the sales team specified in the salesperson card will be used when creating sales documents.

> **NOTE**
>
> If you assign salespeople based on sales territories of customer groups, you might prefer to leave the salesperson unassigned on the customer card, and use salesperson rules instead.

### Ship-to Addresses

In addition to the standard salesperson, iDynamics Commissions lets you specify a different salesperson (and additional salespeople) for each ship-to address.




You can get a list of all customer ship-to addresses and their assigned salesperson using the *Actions* > *Commissions* > *Salespeople by Ship-to Address* action in the Business Central customer list.

## Sales Documents

After a sales document has been created, iDynamics Commissions will automatically update the assigned salesperson when the sell-to customer, the bill-to customer, or the ship-to address are updated. When this happens, any additional salespeople assigned to the ship-to address, customer, or salesperson, will also be assigned to the document.

Check the salespeople section of the sales documents chapter, to learn all of the different ways in which you can assign to a sales document all the different people that took part in the sale.

# Salesperson Rules

## Description

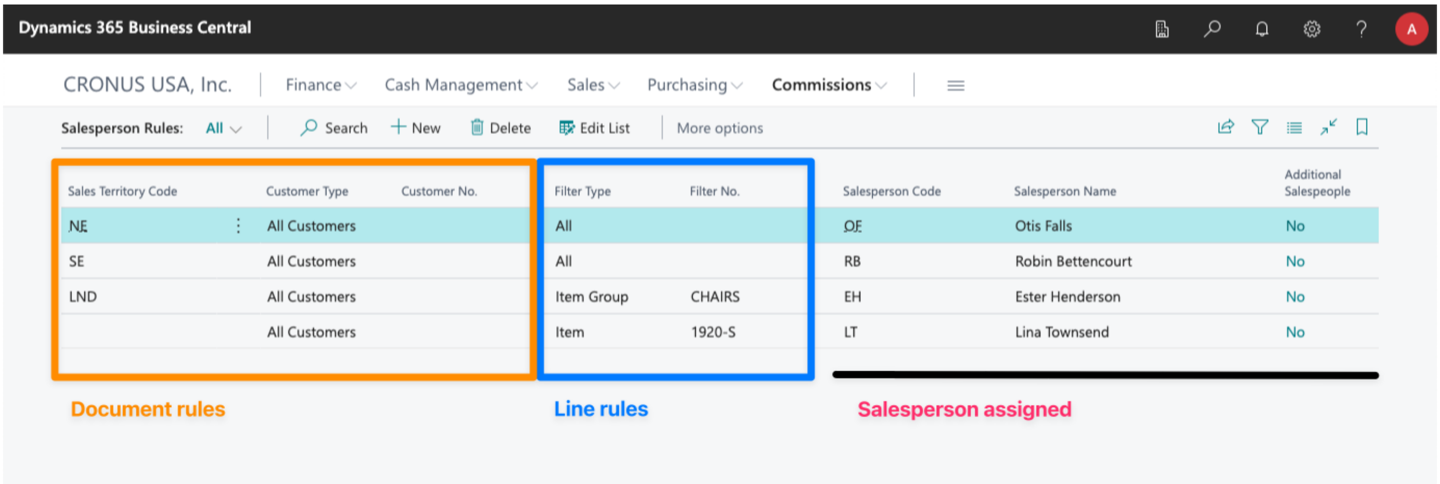
Sometimes you might not want to assign salespeople based on the specific customer assigned to the sales document, but to the actual item being sold, or maybe to the area in which the customer (or its ship-to address) is located.

Salesperson rules let you set up these specific scenarios and more.

Salesperson rules can be accessed from the Commissions menu or by searching for them on the Business Central *Tell me more* search box.

## Document vs Line Rules

When you define salesperson rules, you can set filters based on the sales document (**where/who**), and filters based on **what** is being sold (that depends on each line).




## Document Rules

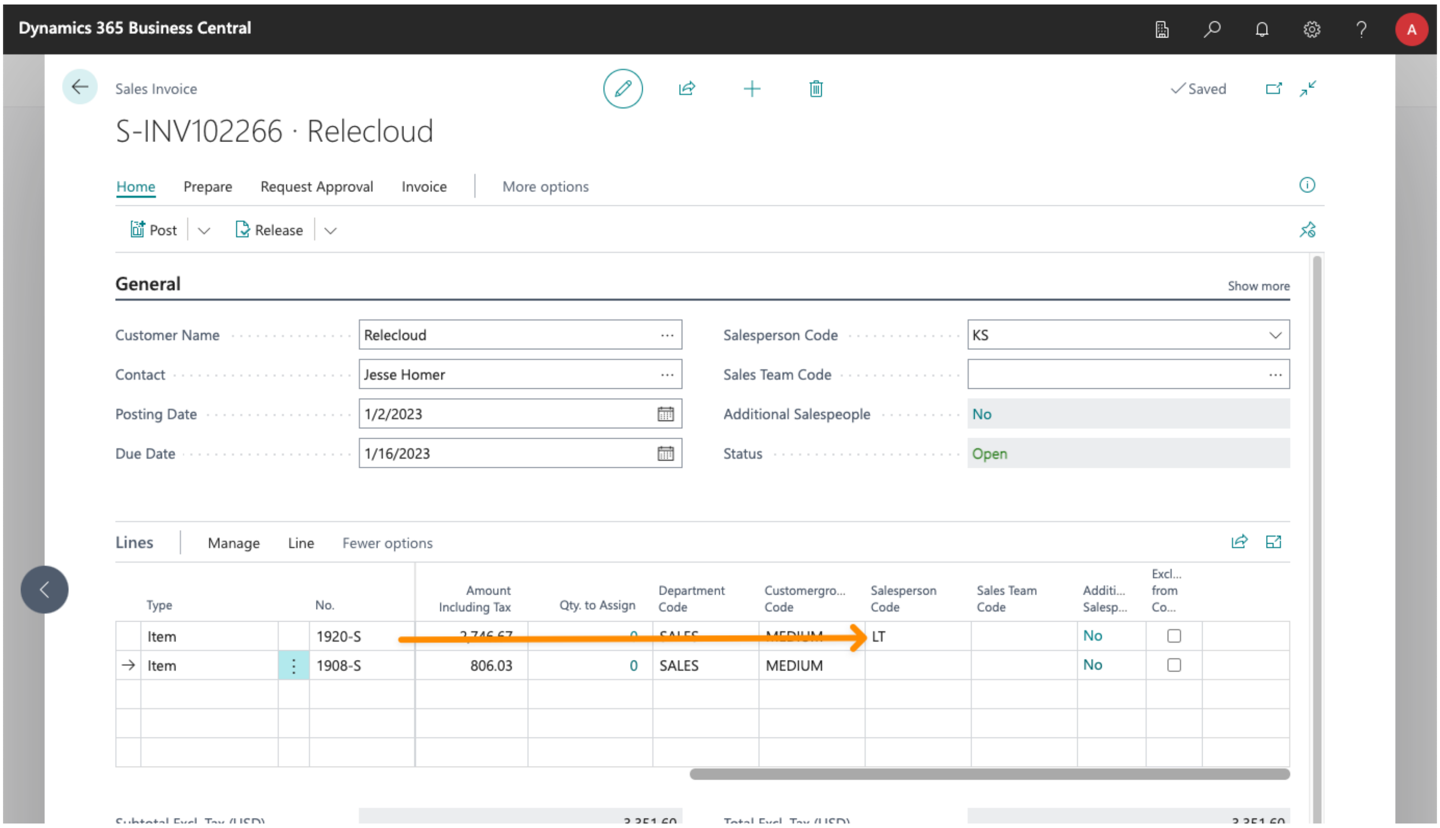
If you define a rule where only document filters have been specified (*Filter Type = All*), the salesperson specified will be assigned to the sales header, only if the customer or ship-to address does not have a specific salesperson assigned.

That way, if you assign a salesperson specifically to a customer on their card, that salesperson will always prevail. And, for customers that don't have a salesperson assigned, the app will check the rules defined to see who should be assigned to the sales document based on the filters defined here.

> **NOTE**
>
> Check the territories section of the manual to learn how the sales territory is assigned to each sales document.

## Line Rules

If you specify that the rule applies to a specific item, resource or G/L account, or any of these elements in an item group, the rule will be applied to each specific line, regardless of the salesperson assigned to the document.

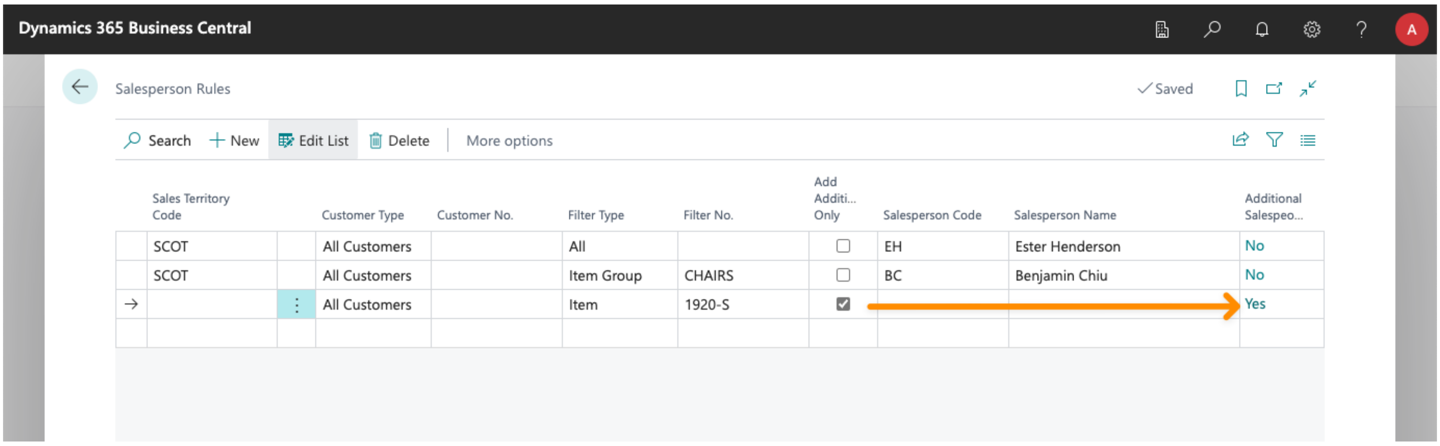


# Additional Rules / Royalties

Since version 5.4 there is a new field called "Additionals Only" in the list of rules that can be checked to specify that this rule should add additional salespeople to the documents or lines that match the rule.

If this field is checked:

- No salesperson can be selected for the rule, only additional salespeople can be added.
- This rule won't replace the salespeople assigned to the document or line but add the selected additionals instead.



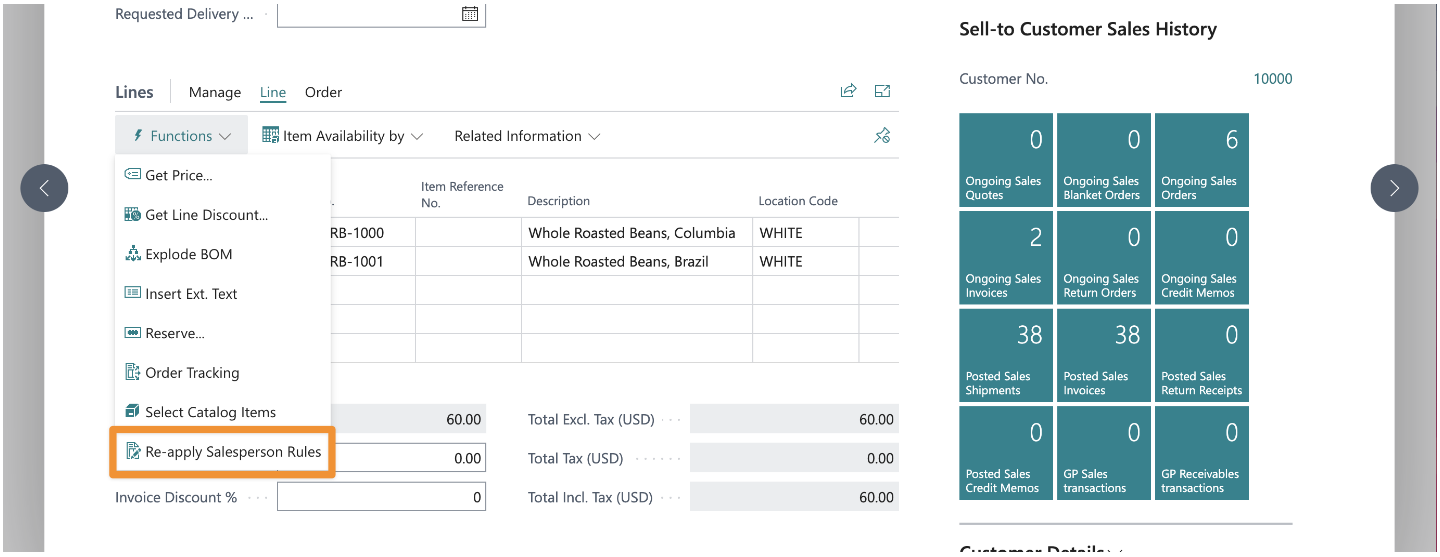
This can be helpful in several scenarios and can be used to give royalties for certain items: just create rules for the items that should receive royalties, and add an additional salesperson that represents the person or company that should receive royalties, specifying the % to be given to them.

You can consult the video below to see a brief summary of how to set up royalties:

# Update existing documents

If you want to re-apply salesperson rules to existing documents, you can do so using the Update Salesperson in Sales Documents action.

Furthermore, on sales documents, you will find the action *Line* > *Functions* > *Re-apply Salesperson Rules*, that lets you update the salespeople assigned to each sales line.



# Additional Salespeople

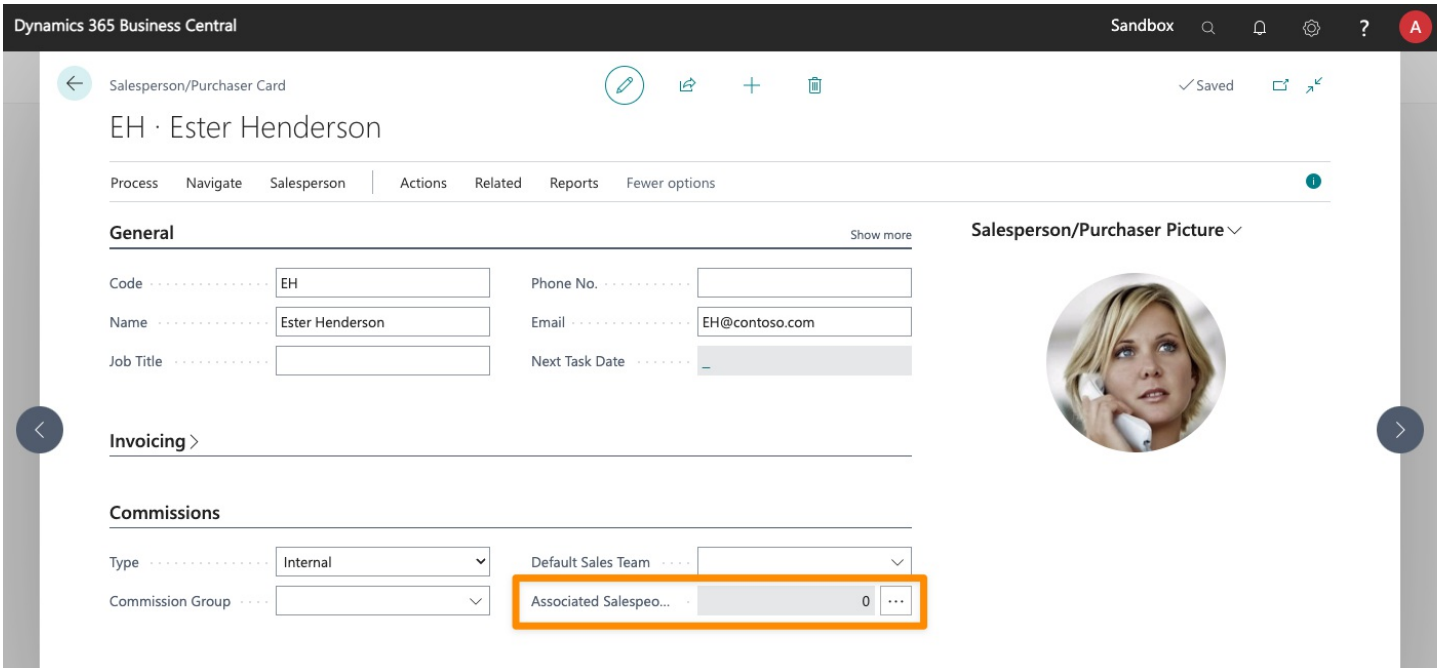
## Introduction

iDynamics Commissions lets you assign more than one salesperson to a sales document (or any of its lines) so that several salespeople can get commissions. Even though this assignment can be manually done for each document, the app lets you set additional salespeople for a particular salesperson, a customer, or a customer ship-to address.

> **TIP**
>
> If you have not checked the section on how to assign multiple salespeople to a sales document, we recommend you that you do so before reading this document.

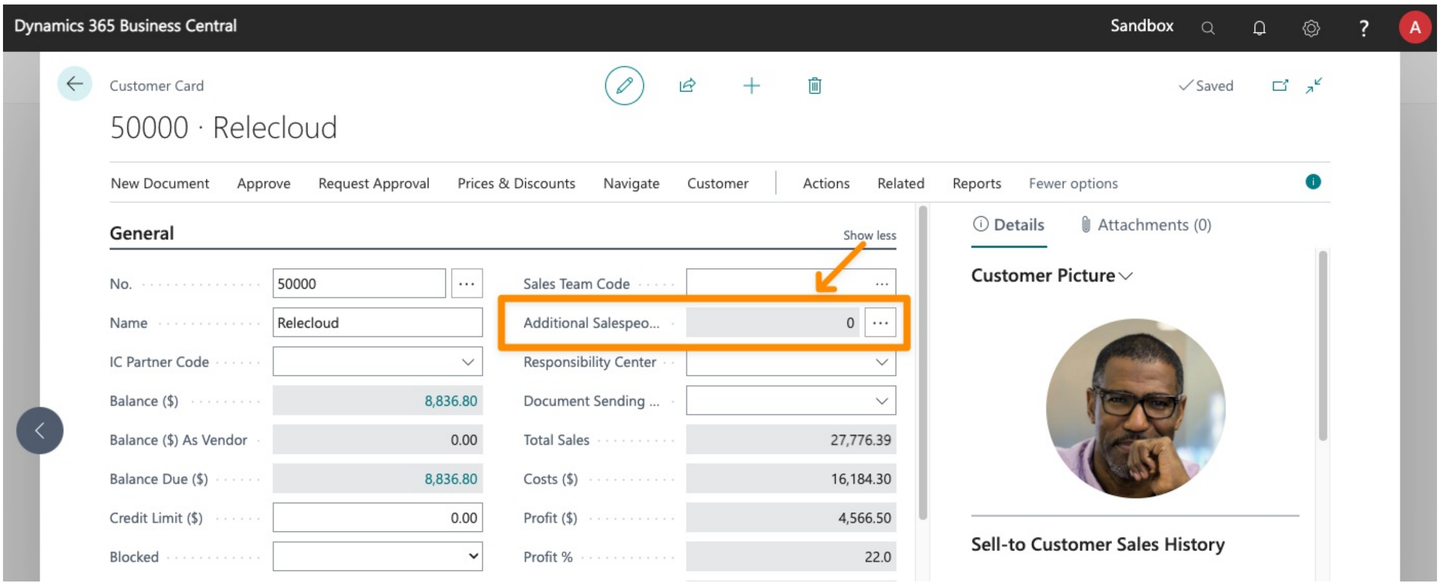
## Salesperson

As mentioned in the introduction, sometimes you might want a salesperson to always share commissions with another one. This can be configured in the salesperson card so that any salespeople assigned to him/her are automatically added to every sales document as additional salespeople.



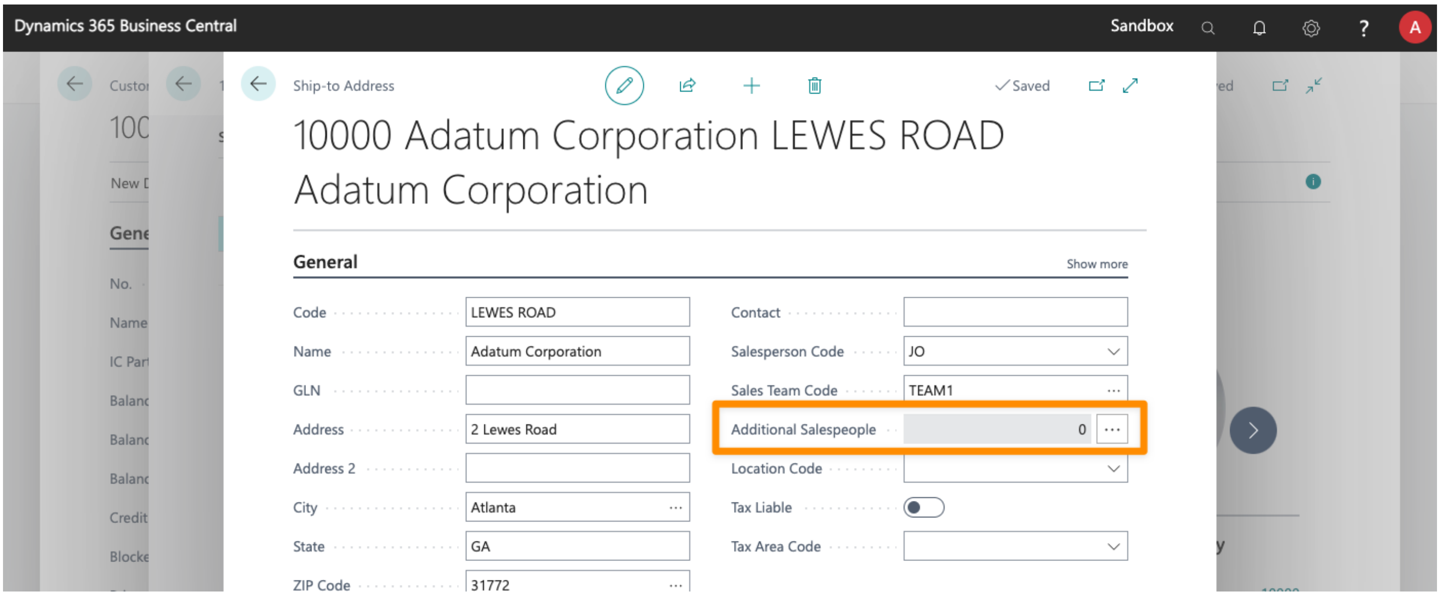

## Customer

You can set additional salespeople for each customer, using the *Additional Salespeople* field.




## Ship-to Address

From the card of any ship-to address for a customer, you can set additional salespeople for that particular address.




Unlike the main salesperson assigned to a ship-to address, which will only take effect if the Salesperson by Shipping Address option is enabled, additional salespeople will always be used if defined.

## Salesperson Rules

When you define rules, you can assign not only the main salesperson that should be assigned to the document or its lines but also any additional salespeople that should be also automatically assigned.

## Assignment order

When the sell-to or bill-to customer in a sales document is modified, or its ship-to address is assigned, iDynamics Commissions will look for additional salespeople set up for:

- The ship-to address.
- The sell-to customer.
- The bill-to customer.
- The salesperson assigned to the document header.

If the app finds additional salespeople defined for any of them, in that order, it will assign them and stop looking for additional salespeople.

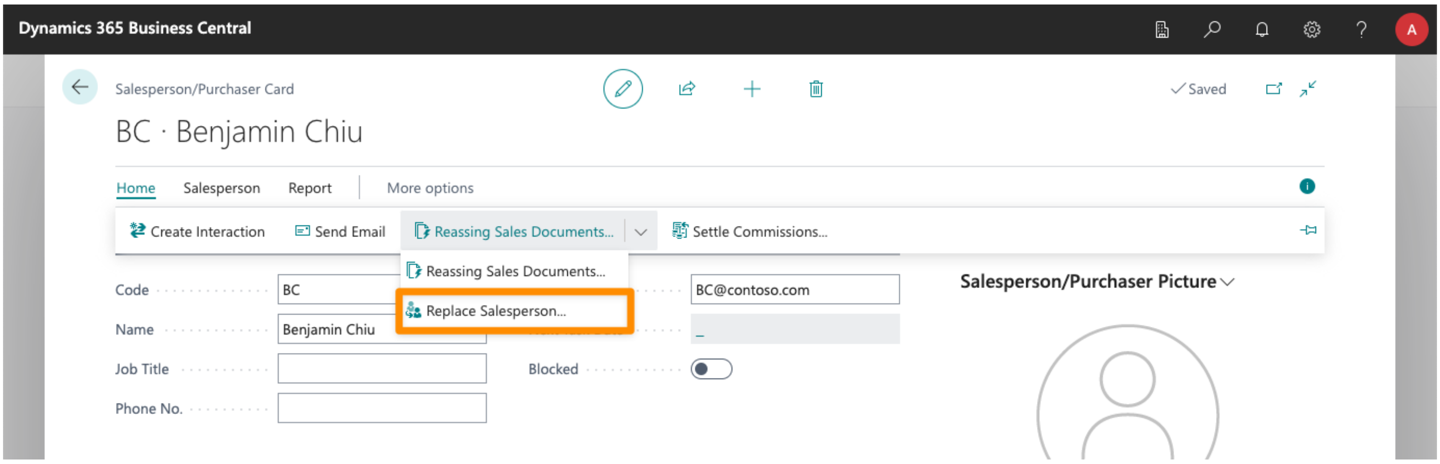
# Update Assigned Salespeople

## Description

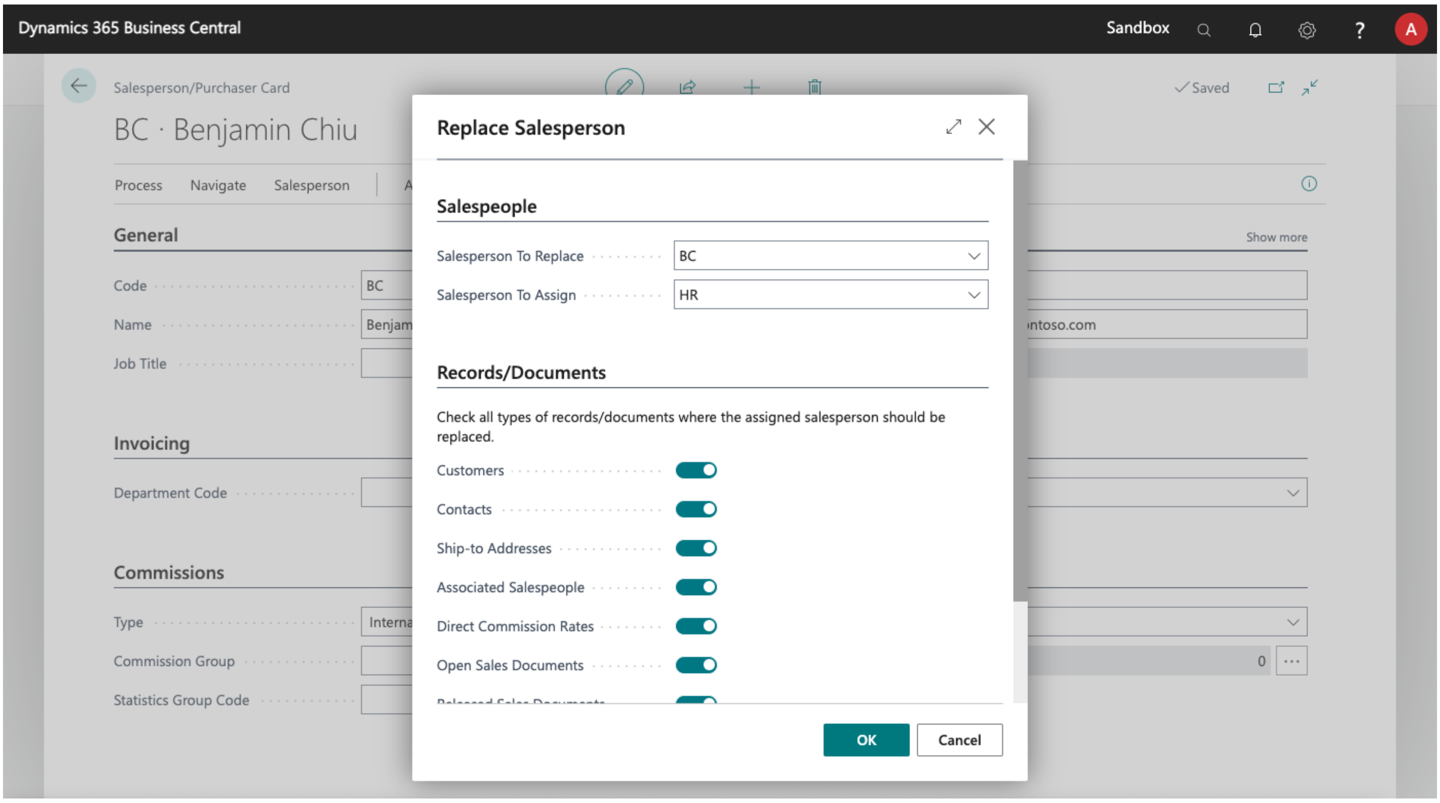
Maybe a salesperson has been promoted to a new position, maybe they have left the company, or maybe they are on medical leave. Whatever the reason, sometimes you need to replace a salesperson or update who is assigned to the active sales documents, and iDynamics Commissions includes several features designed to help you with these tasks.

## Replace a Salesperson

This is the most basic scenario. A salesperson has left the company and a new one is going to replace them, taking over their customers and active sales documents. In order to help you with this process, you will find a *Replace Salesperson...* action.




This action lets you specify the code of the salesperson to replace and the code of the salesperson that will replace them. In addition to that, you can specify which records will be updated with the new salesperson code.



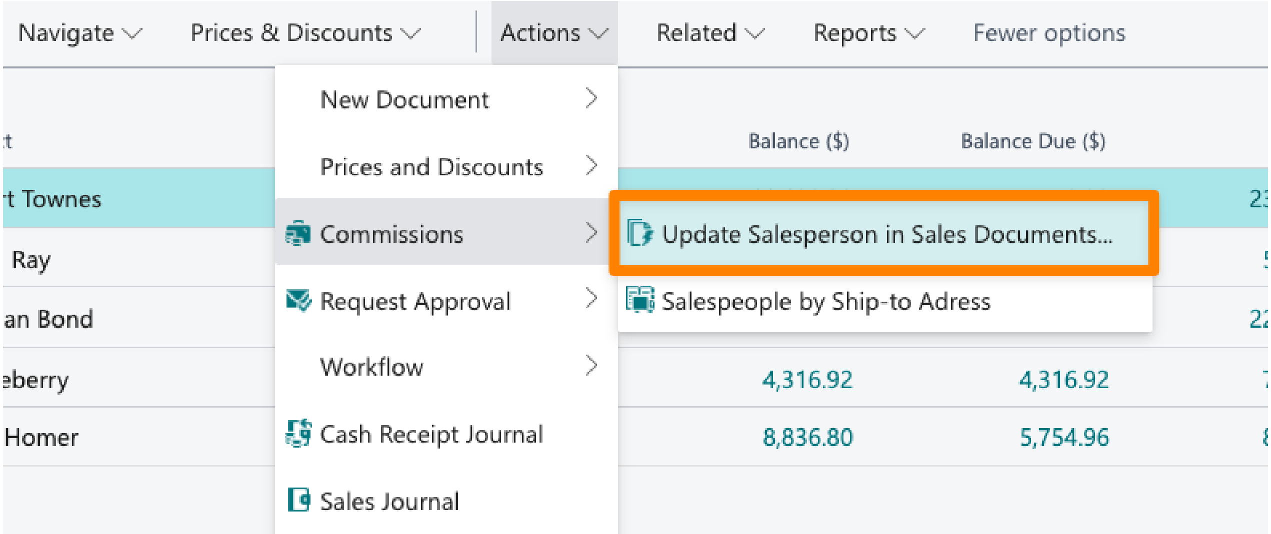

In customers, ship-to addresses and sales documents, the salesperson will be replaced whether they have been assigned as the main salesperson or as an additional salesperson.

Furthermore, in sales documents, the process will also update any sales lines assigned to the salesperson to replace.

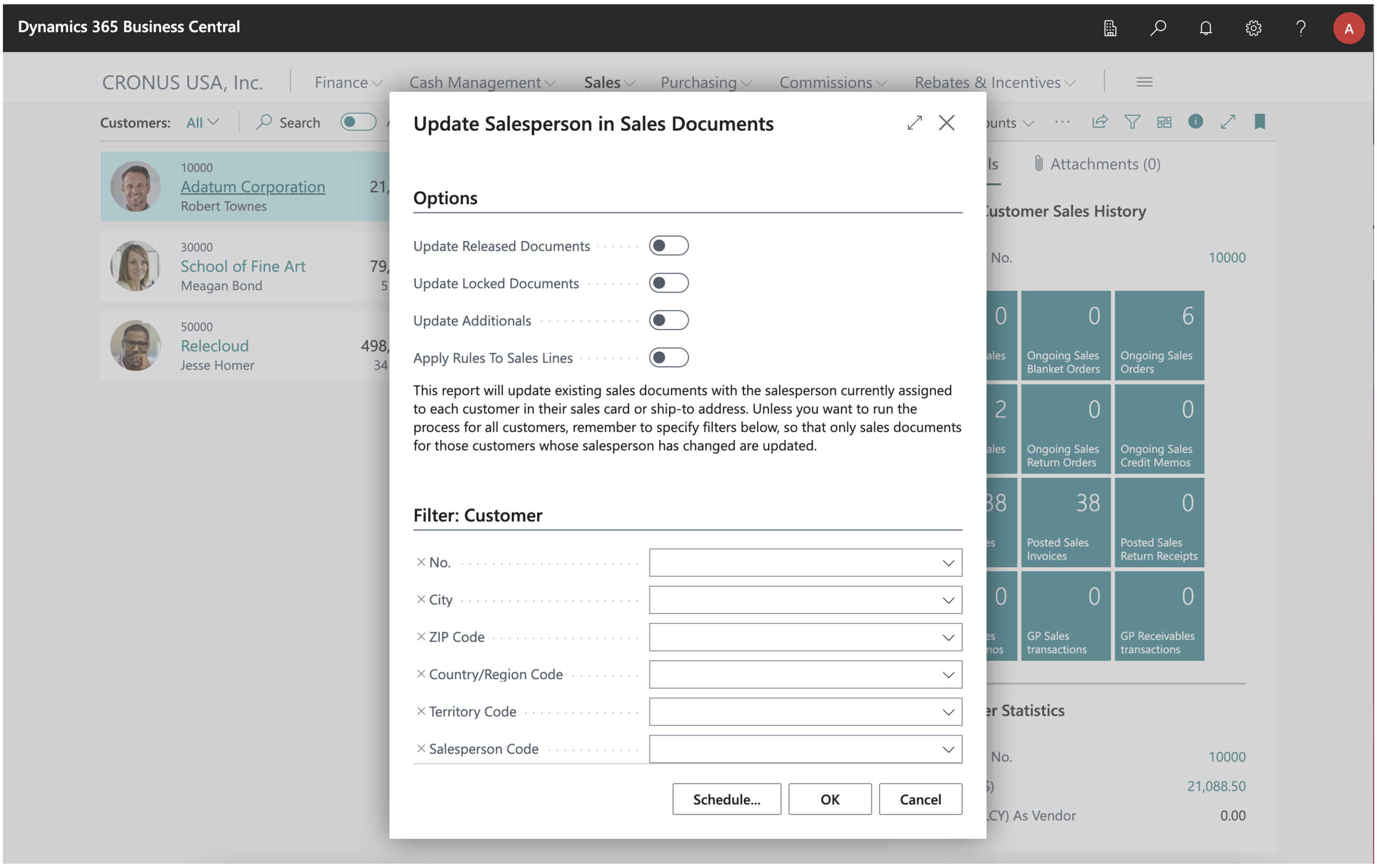
# Update Salesperson from Customers/Rules

In this scenario maybe a salesperson has left the company and their customers have been split among different salespeople, or maybe there have been changes in how salespeople are assigned to customers. Whatever the reason, there is a group of customers that now have a different salesperson assigned to them, and we want to update any active sales documents so that they match this new configuration.

In order to do so, we have the *Update Salesperson in Sales Documents...* action, available in the customer list.




This action lets specify filters for customers and sales documents so that you can specify which documents should be updated.

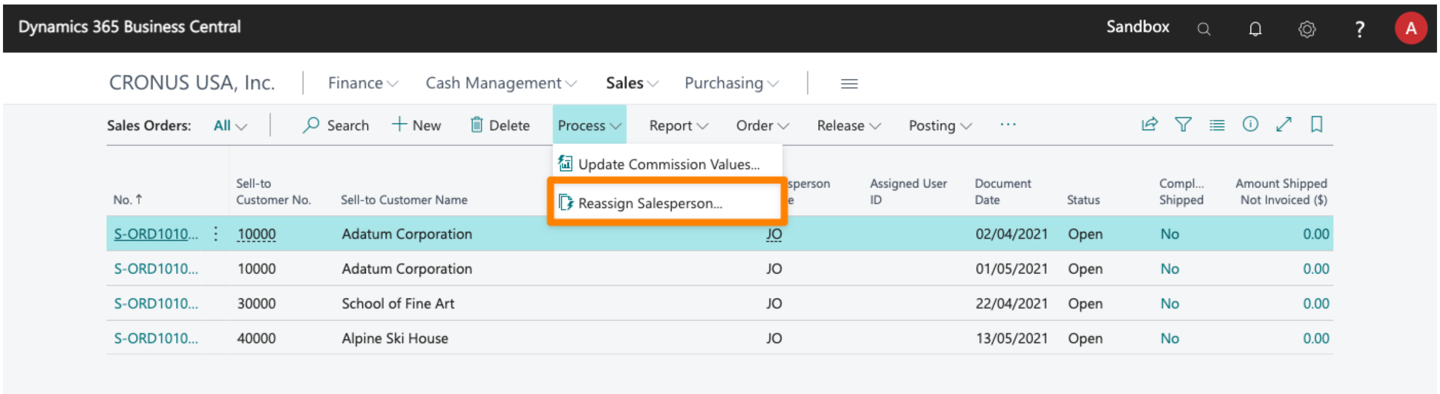



The update process will loop over all sales documents that match the specified filters, check the salesperson currently assigned to the customer (either in their card or ship-to address), and update the sales document accordingly.

Note: this action will only be available if the Salesperson by Ship-to Address option has been enabled in iDynamics Commissions.

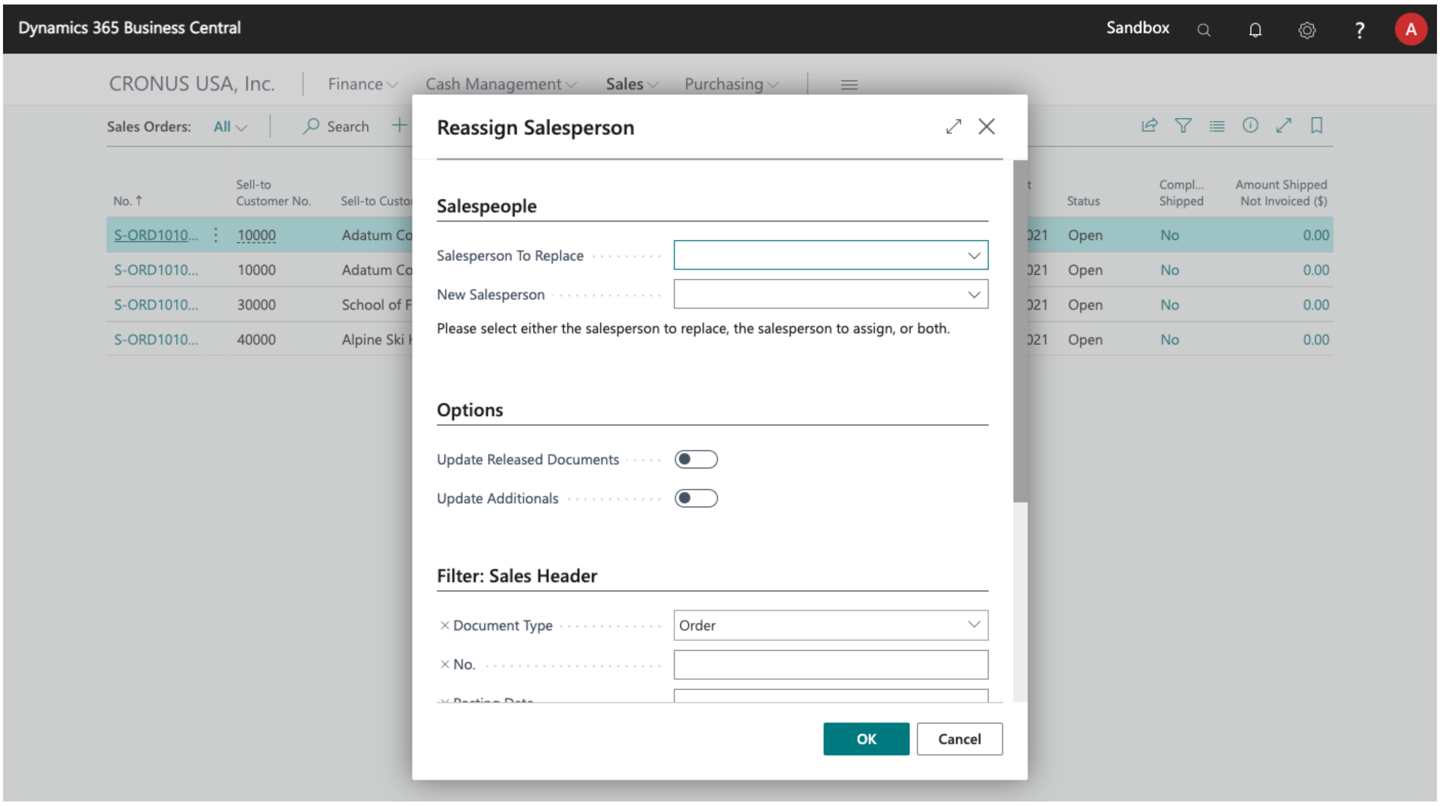
# Reassign Sales Documents

Available from the *Home* menu in any (non-posted) sales document list, in the salesperson card, or from the *Tell Me...* search box in Business Central, this action lets you change the salesperson assigned to all sales documents that match the criteria set by the user.




This action can be useful, for example, when a salesperson leaves the company, to change all active sales documents currently assigned to them.

This action allows for three possible combinations, explained below.




### Specify Just the Salesperson to Replace

If only this salesperson is specified, the report will work just as the update salesperson would, checking the current configuration for the customer assigned to each sales document within the specified filters and applying the salesperson assigned to each one.

### Specify Just the New Salesperson

If only the new salesperson is specified, the report will assign this salesperson to the document header of every sales document that matches the filters specified.

### Specify Both the Salesperson to Replace and the New Salesperson

In this case, the application will work just as it would for sales documents using the replace salesperson action: it will replace all appearances of the original salesperson when assigned to the document header, to a specific line, or assigned as additional (these last two options can be disabled).

### Additional Options when Reassigning Documents

In all cases these two options will be available:

- **Update Released Documents**. If unchecked, only documents in the *Open* status will be updated.
- **Update Additionals**. If checked, when the main salesperson for a document is updated, the app will check if any additional salespeople have been configured for the salesperson/customer and apply them to the sales document.

In addition to the previous options, when both the salesperson to replace and the salesperson to assign have been specified, you will have the option to choose whether you want to update any case in which the original salesperson had been assigned at the line level or as additional.

# Sales Teams

## Description

As its name implies, sales teams let you group salespeople into teams. At its most basic level, this feature can be used to keep track of the different teams within the company, and who is in charge of each one. It can also be used to define direct commission rates for members of the team so that when a salesperson posts a sale, not only do they receive a commission, but also the manager and/or any other roles that have been configured within the team.

In this video, we explain how to define and use sales teams.

## Configure Sales Teams

At its most basic, teams group a list of salespeople and (optionally) their manager.

Learn how to create and configures sales teams

## Configure Roles

You can define different roles within a team. Not just to know who is who in the team, but also to later be able to define commission rates for the different roles, when a member of the team posts a sale.

Learn more about team roles

## Configure Direct Commission Rates

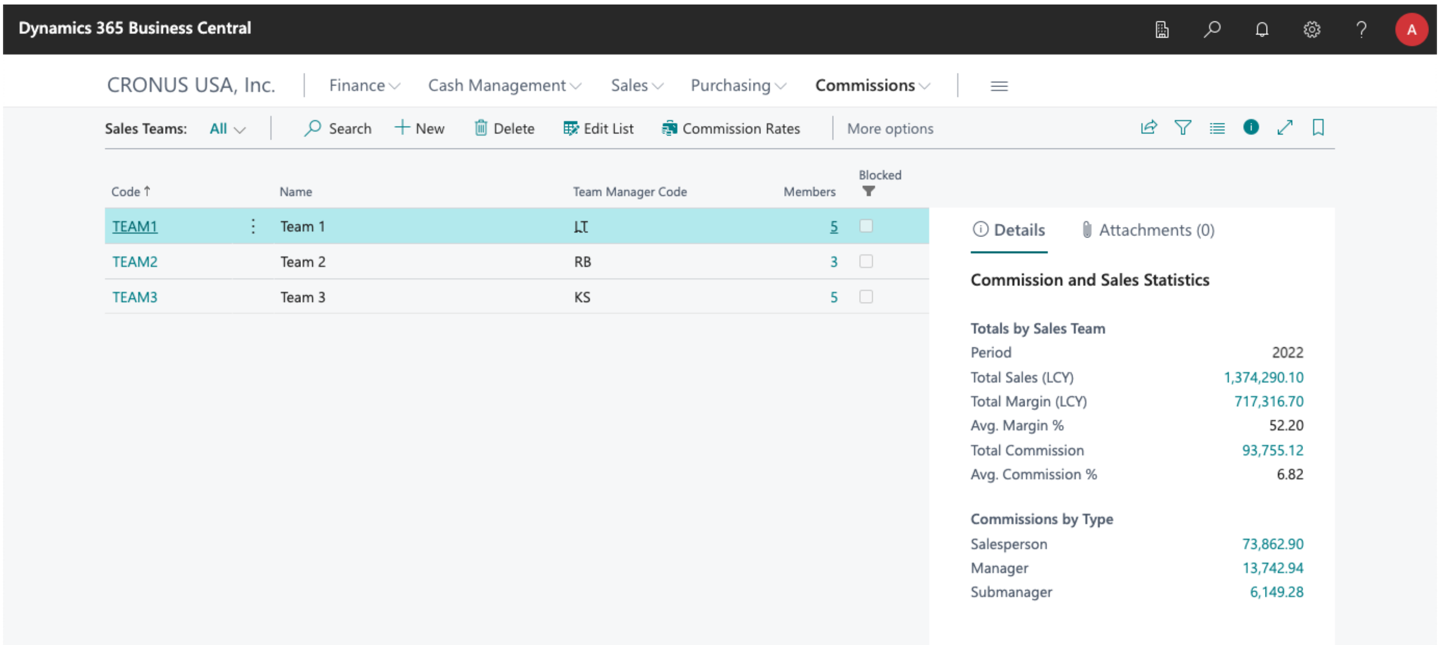
Once you have created sales teams, there is a good chance that you might want to define commissions for the managers or members (with a role) of the different teams.

Learn how to define commissions for managers and team roles

# Configure a Sales Team

## Description

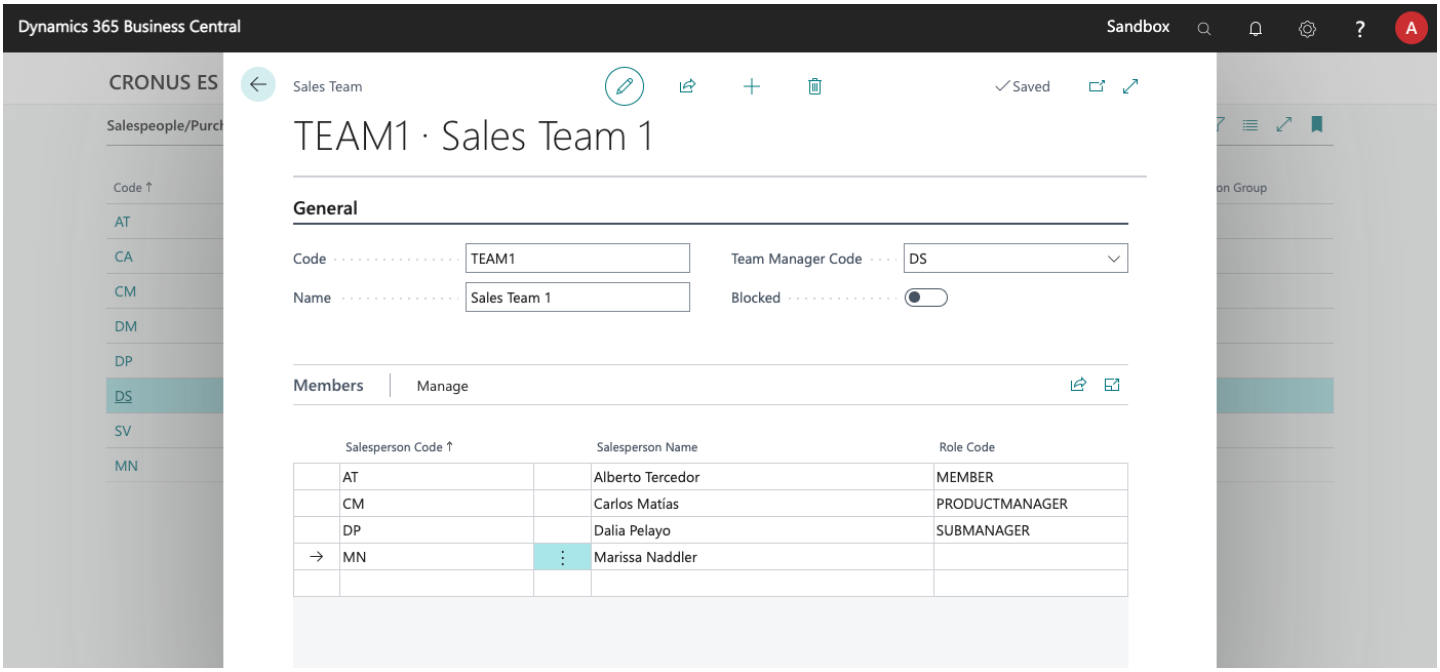
You can access sales teams from the Commissions menu, by searching for Sales Teams in the Business Central *Tell Me...* search box, or by navigating from the *Default Sales Team* field in a salesperson card.



## Define Its Members

A sales team can have as many members as desired, and a salesperson can be a member of several teams. The only thing that you need is to specify a code and name for the team, and you can start adding members to it.

Note that, when you assign a default sales team to a salesperson (in their card), if the salesperson is not yet a member, the app will ask you if you want to add it to the team. So you can just create the team and add its members automatically as you specify the team in their cards.



## Define a Manager and Set Roles

Both of these things are totally optional, but the app lets you set a manager for the team (they do not need to be members of the team) and set roles for some of the members. Note that the same salesperson can be assigned multiple times to a team, in order to assign several roles to them.

## Block It When It Is No Longer Needed

Once a team has commissions and sales statistics assigned to it, it cannot be deleted. Over time this can be a hassle if unexisting teams keep appearing when assigning teams in Business Central. Blocking a team will hide it from lookups. The app even filters the list of teams so that blocked teams are not shown by default.

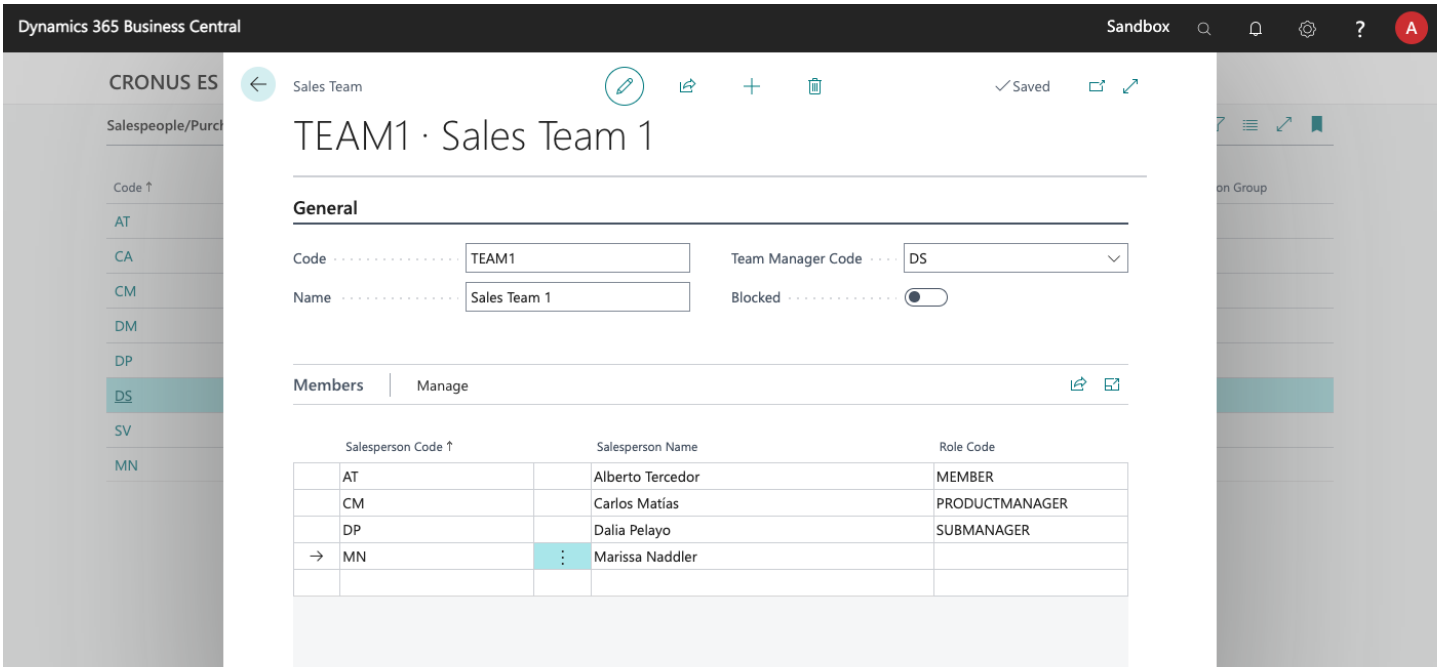
## See All Teams for a Salesperson

From the salespeople list, or the salesperson card, you can click on the *Salesperson* > *Sales Teams* action, to see all teams assigned to the salesperson.

# Sales Roles

## Description

Sales teams usually have a manager that is responsible for the team. But some companies might want to define several managers for a team, or even specific roles for salespeople that, due to their position, should receive a commission every time a team member posts a sale.




Roles can be seen to the right of the name of each team member and can be defined by the user. See the direct commission example in this chapter, to learn how you could define commission rates so that, in the example screenshot above, both David Serna (DS, the team manager) and Dalia Pelayo (submanager) get a commission when Marissa Naddler performs a sale.

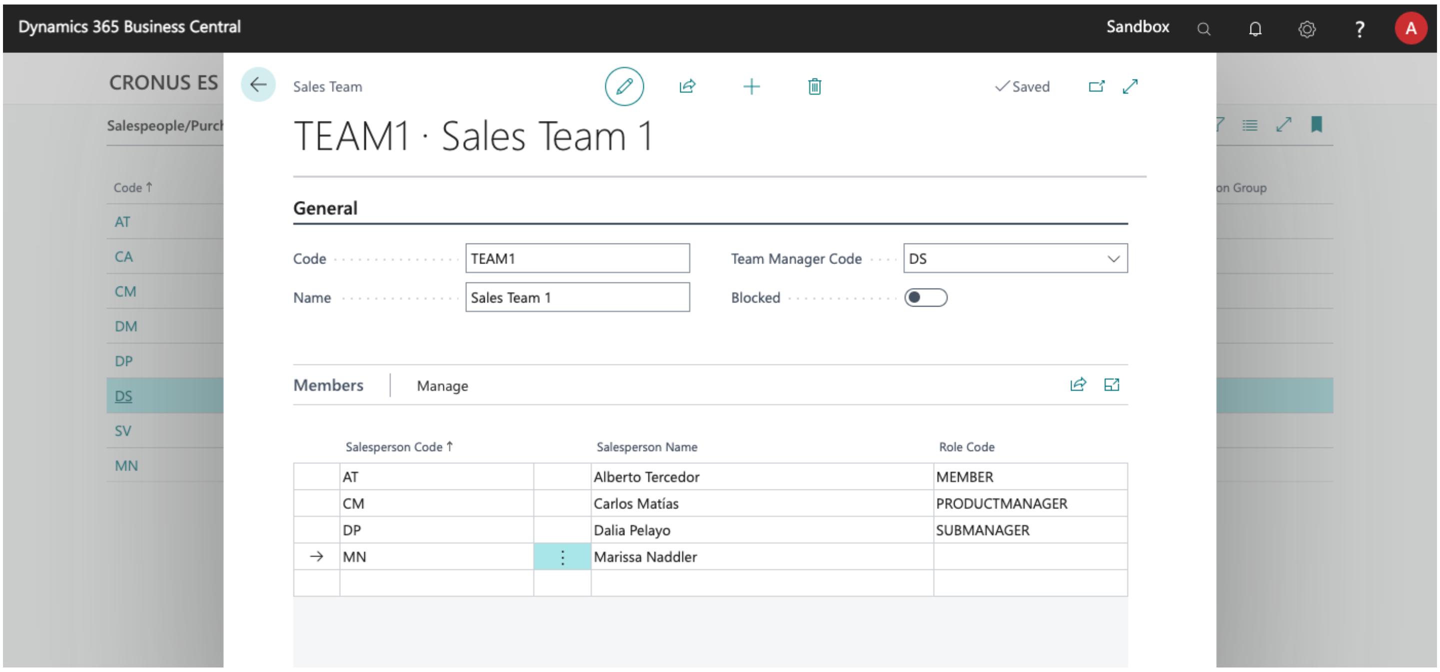
**NOTE**

The same salesperson can be assigned multiple times to a team, in order to assign several roles to them.

# Direct Commissions Example

## Description

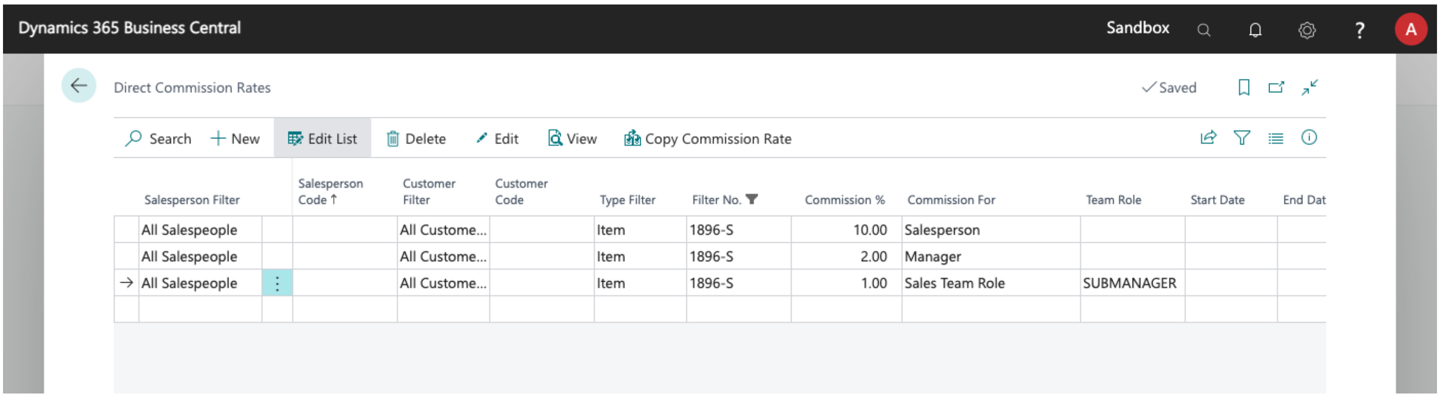
Once you have created sales teams, there is a good chance that you might want to define commissions for the managers or members (with a role) of the different teams. In this example we are going to start with a team with this definition:




As you can see, the team has a manager defined (DS - David Serna) and has four members, three of them with roles assigned to them.

We are going to configure direct commission rates so that, when any member of the team posts a sale, both David Serna (DS, the team manager) and Dalia Pelayo (submanager) get a commission, in addition to the salesperson who actually achieved the sale.

## Direct Commission Rates




As you can see in the previous screenshot, we have set three commission rates, for all salespeople, all customers, and item 1896-S (ATHENS Desk). In the example above, the actual salesperson that achieved the sale will get a 10%, the team manager will get a 2%, and the submanager will get an additional 1%.

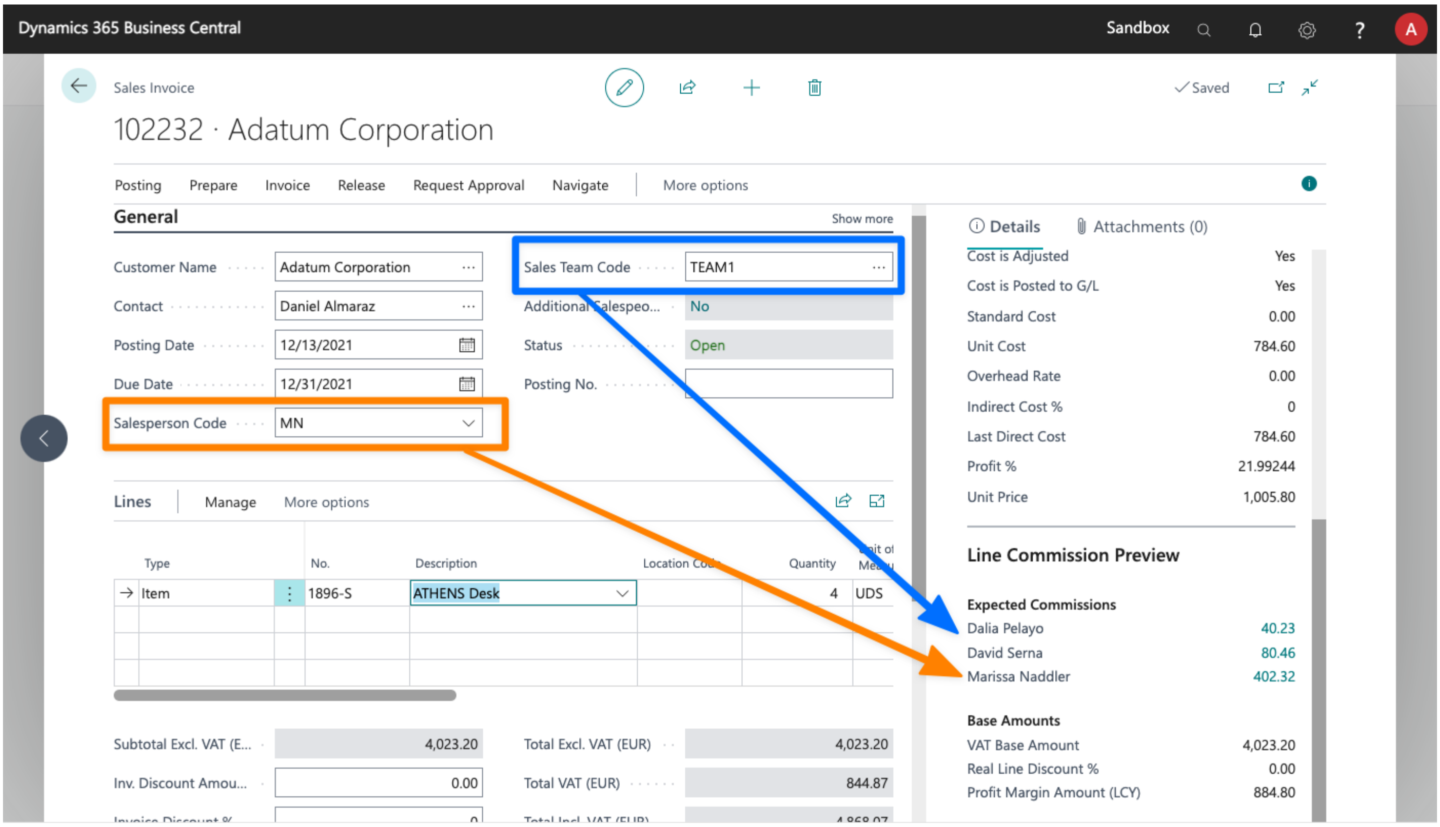
Notes:

- We have specified a manager commission for *All salespeople*. This means that all managers, of every team, will get this commission. Same thing for the submanager.
- If a team does not have a manager or submanager (or if a salesperson is not in a team), those commission rates simply will not apply.

- Some members of the team had roles assigned to them but no commission rates have been defined, so they won't get any commission.

## Create a Sales Document

For this example, we are going to create a new sales invoice, assign Marissa Naddler as the salesperson, assign TEAM1 as the sales team, and add a line for the ATHENS Desk.




As we can see in the screenshot, three commissions will be generated for the sales line, one for each one of the commission rates that we defined above. When the sales document is posted these are the commissions that will be created.

# Direct Commissions

iDynamics Commissions lets you set two different types of commissions: direct commissions, or sales target commissions. The former, detailed in this chapter, are generated automatically when a sales document is posted.

Even though commissions can be set manually for each sales line, one of the main features of iDynamics Commissions is the automatic generation of commissions based on the rules set for the combination of item, customer, profit margin, date, etc.

## Define Commission Rates

Commission rates let you combine customers, salespeople, and items, in order to configure which percentage will apply to each combination, taking into account the date and the profitability of the sale.

Learn how to define direct commission rates

## General Setup

iDynamics Commissions offers multiple options to fine-tune how commission rates should be applied and when can commissions be settled.

Learn about the different configuration parameters

## Priority

When configuring the app, you can define that *the most specific* commission rate should apply. But, what makes a commission rate more specific?

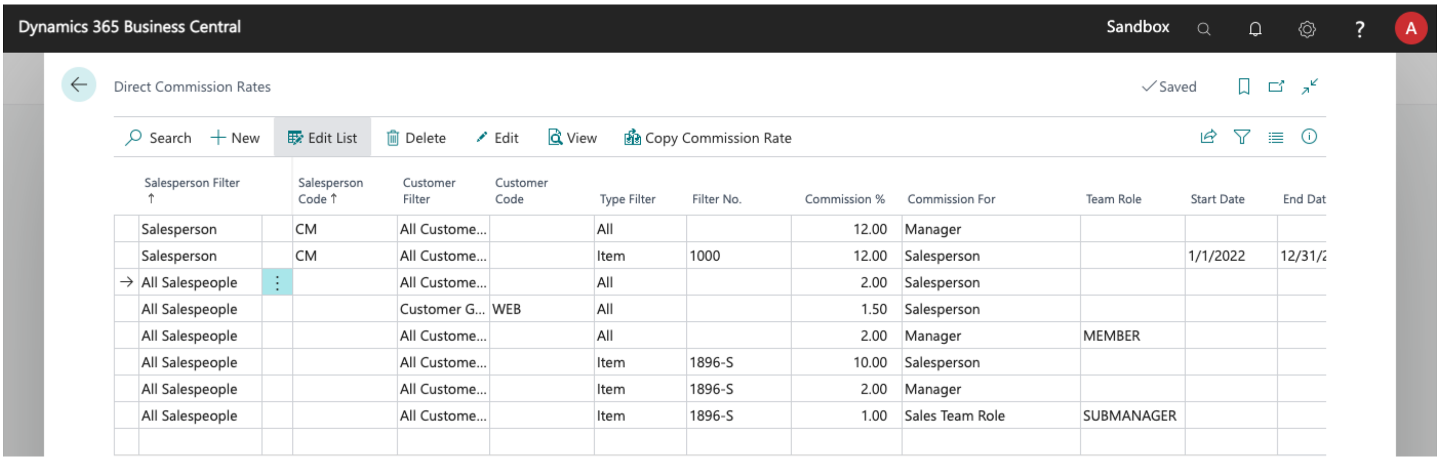
Learn about how the app decides which commission rate is more specific

# Direct Commission Rates

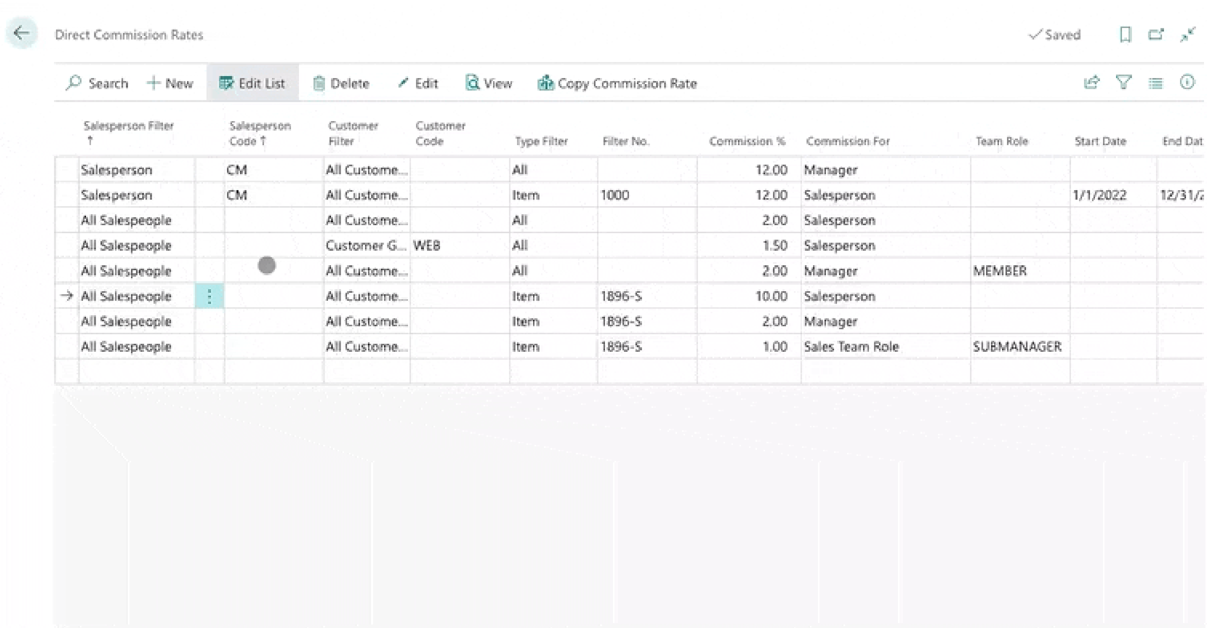
In this video, you can find out how to set direct commission rates.

Commission rates let you combine customers, vendors, and items, in order to configure which percentage will apply to each combination, taking into account the date and the profitability of the sale.

You can navigate to the *Direct Commission Rates* list from the main *Commissions* menu, from the *Manual Setup* list of Business Central, using the *Tell Me...* search box, or through any of the actions available in the *Salespeople/Purchasers*, *Customers* and *Items* lists.




As there are many options and filters that can be set to decide which commission applies to a sales line, this list shows the most commonly used fields. You can choose the *Edit* action to edit the whole list of options available or personalize the list to show the fields/parameters that you want to use.

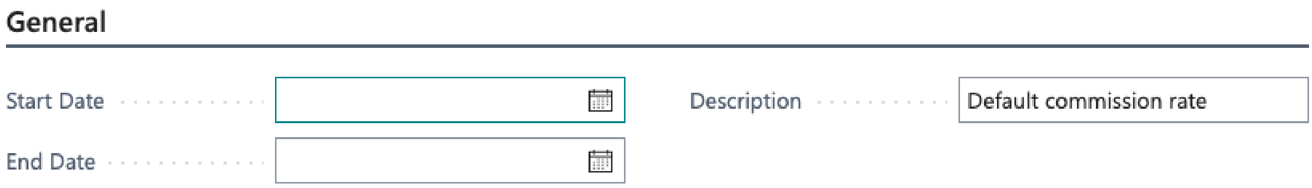



## Configuration

To set up a commission rate, the following fields are available, grouped by their functionality:

General

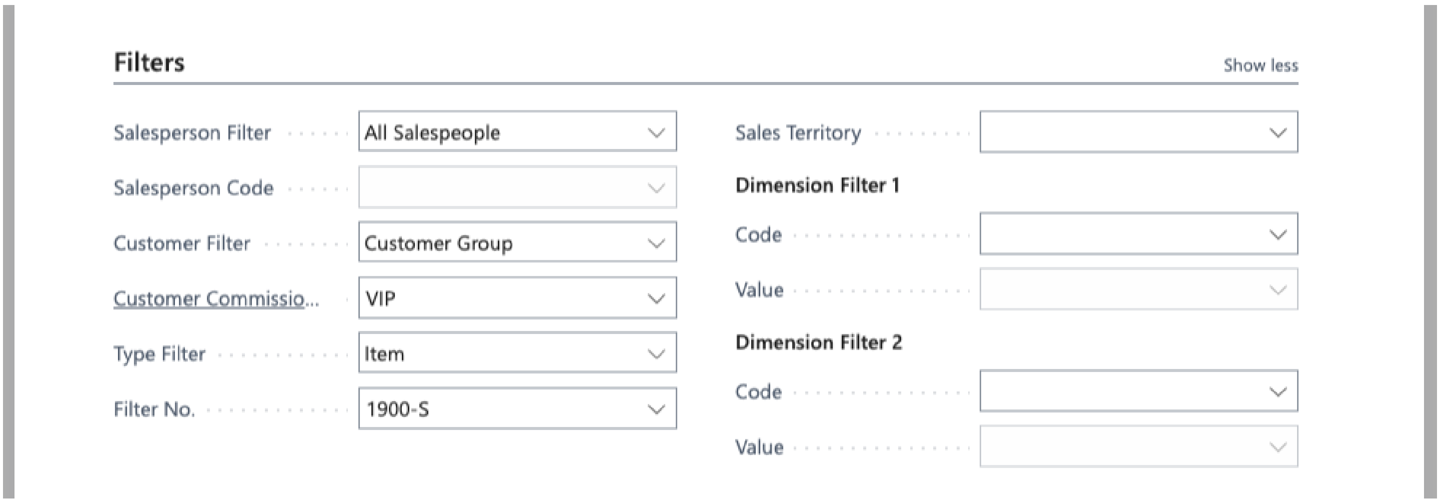
Optionally, you can set a period of dates on which the rate will apply.




- **Start Date**. This is the date from which the defined rate is valid. Optional.
- **End Date**. This is the date until which the defined rate is valid. Optional.
- **Description**. You can give the rate a description to help you identify it. Optional.

Filters

These filters will decide whether a sales line should get this commission rate or not. Note that dimension and customer filters are hidden by default (use the *Show more* link located at the top right to show them).




- **Salesperson Filter**. The available values are:
  - *Salesperson*. The rate applies to a particular salesperson.
  - *Sales Team*. The rate applies to all sales documents assigned to this team.
  - *Salesperson Group*. The commission will apply to all salespeople assigned to a particular *Salespeople Commission Group*.
  - *All Salespeople*. This rate will apply to all salespeople.

- **Salesperson Code**. The specific salesperson, team, or commission group to which the rate will apply, depending on the value of the previous field.
- **Customer Filter**. The available values are:
  - *Customer*. The rate applies to a particular customer.
  - *Customer Group*. The commission will apply to all customers assigned to a particular *Customer Commission Group*.
  - *All Customers*. This rate will apply to all customers.

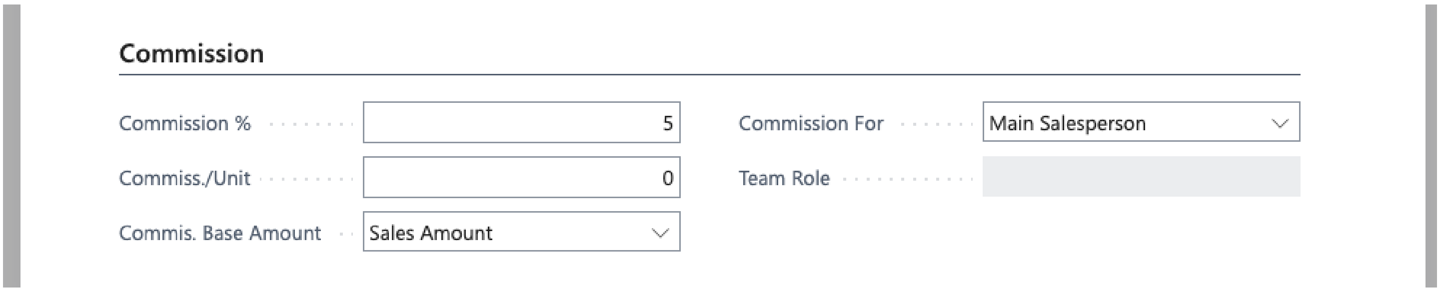
- **Customer Code**. The specific customer or commission group to which the rate will apply, depending on the value of the previous field.
- **Type Filter**. Sets to which sales lines the rate will apply:
  - *Item*. The rate applies to a specific item.
  - *Resource*. The rate applies to a specific resource.
  - *GL Account*. The rate applies to a specific GL account.

- *Item Charge* The rate applies to a specific item charge.
- *All Items*. The rate applies to all lines of type *Item*.
- *All Resources*. The rate applies to all lines of type *Resource*.
- *All GL Accounts*. The rate applies to all lines of type *GL Account*.
- *All Item Charges*. The rate applies to all lines of type *Item Charge*.
- *Item Commission Group*. The rate will apply to any element assigned to an item group
- *Advanced Filter*. The rate applies to all elements included in the advanced filter.
- *All*. The rate applies to all lines of types *Item*, *Resource*, *GL Account* and *Item Charge*.

- **Sales Territory**. The rate will only apply to sales documents sold in this sales territory.
- **Dimension Filter 1**. Specifies a dimension filter. If specified, the rate will only apply to sales lines with this combination of dimension code and dimension value.
- **Dimension Filter 2**. Specifies an additional dimension filter. If specified, the rate will only apply to sales lines with this combination of dimension code and dimension value.

### Commission

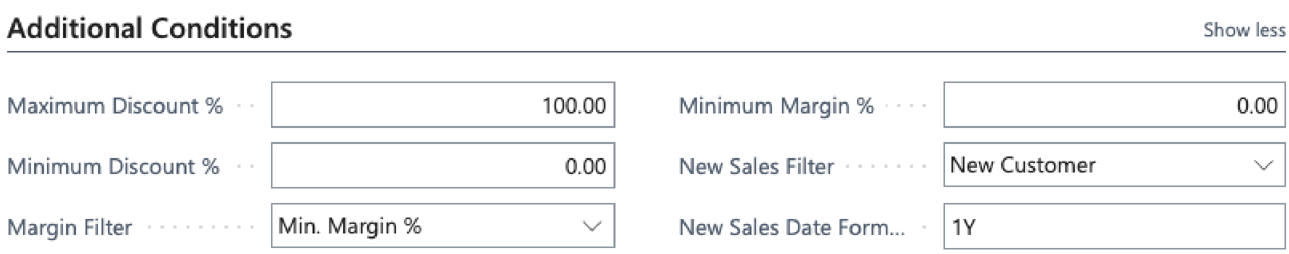
The commission will apply to sales lines when the selected filters are met.




- **Commission %**. This is the commission percentage that the salesperson will get. The base amount on which this percentage will be applied is the line amount with all discounts applied and before taxes.
- **Commission/Unit**. A fixed commission amount will be given for each unit sold. Will be added to the commission amount obtained after applying the *commission %*.
- **Commission Base Amount**. The commission % can be applied to the sales amount or profit margin of each line. By default, the app obtains the profit margin by subtracting the total cost of the line from its sales amount, but this can be customized using events.
- **Commission For**. By default, commission rates will apply to the salesperson assigned to the sales document/line, but you can also set commissions for additional salespeople in the sales document, as well as for the team manager and other roles within the team assigned to the sale.
- **Team Role**. If you specify that you are going to set a commission for a specific role, in the *Commission For* field, here you can select the role that will get the commission.

### Additional Conditions

You can set discount and profitability requirements. In fact, you could set multiple commission rates with a different *maximum discount*, to give a different commission % depending on the discount applied by the salesperson.




- **Maximum Discount %**. The maximum discount % that can be applied to a sales line in order to get this commission. If the line has a higher discount %, this commission will not be applied. You can learn more about how this discount is calculated in the sales discounts section of the manual.

- **Minimum Discount %**. Available as an additional field if you click on *Show more*, you can actually set a minimum discount. You don't need to use it this field if you want to set tiered commissions based on discounts (the higher the discount the lower the commission), as just setting the *Maximum Discount* would be enough, but it can be useful if you actually *give a higher commission for a higher discount*.
- **Margin Filter**. You can specify if there is a minimum margin below which the commission rate will not apply (Min. Margin %), if the margin is not important (No Filter) and the commission rate should always apply, or if the commission rate is a penalty that will be applied when something is sold below cost.
- **Minimum Margin %**. It is a percentage below which no commission is applied. The app obtains this value by using this formula on the fields of the sales line: ("Unit Price" - "Unit Cost") / ("Unit Price" * 100).
- **New Sales Filter**. You can use this filter to define commissions that only apply to new customers or new sales. Currently you can specify that the commission only applies after a new customer has been created in BC, after the first time a sale is posted for them, or the first time that an item is sold to them.
- **New Sales Date Formula**. You can specify for how long the commission will apply, after the previous event has occurred. E.g. you can specify that the commission will only apply for one year (formula: "1Y") after the customer was created, or after the first order was received. You can specify "0D" if you just want the commission to apply on the date that the trigger happened (e.g. so that the rate only applies the first time the customer places an order).

### Document Filters

These let you specify filters based on the actual sales document, rather than on the individual line for which commissions are being calculated.

The margin options available as the same ones as for the sales line (see *Margin Filter* and *Minimum Margin %*, in additional conditions), but they will check the margin of the whole document.


Note that, when calculating the margin of the document, the app will ignore those lines that have been configured to be excluded from sales stats.

### Customized Conditions

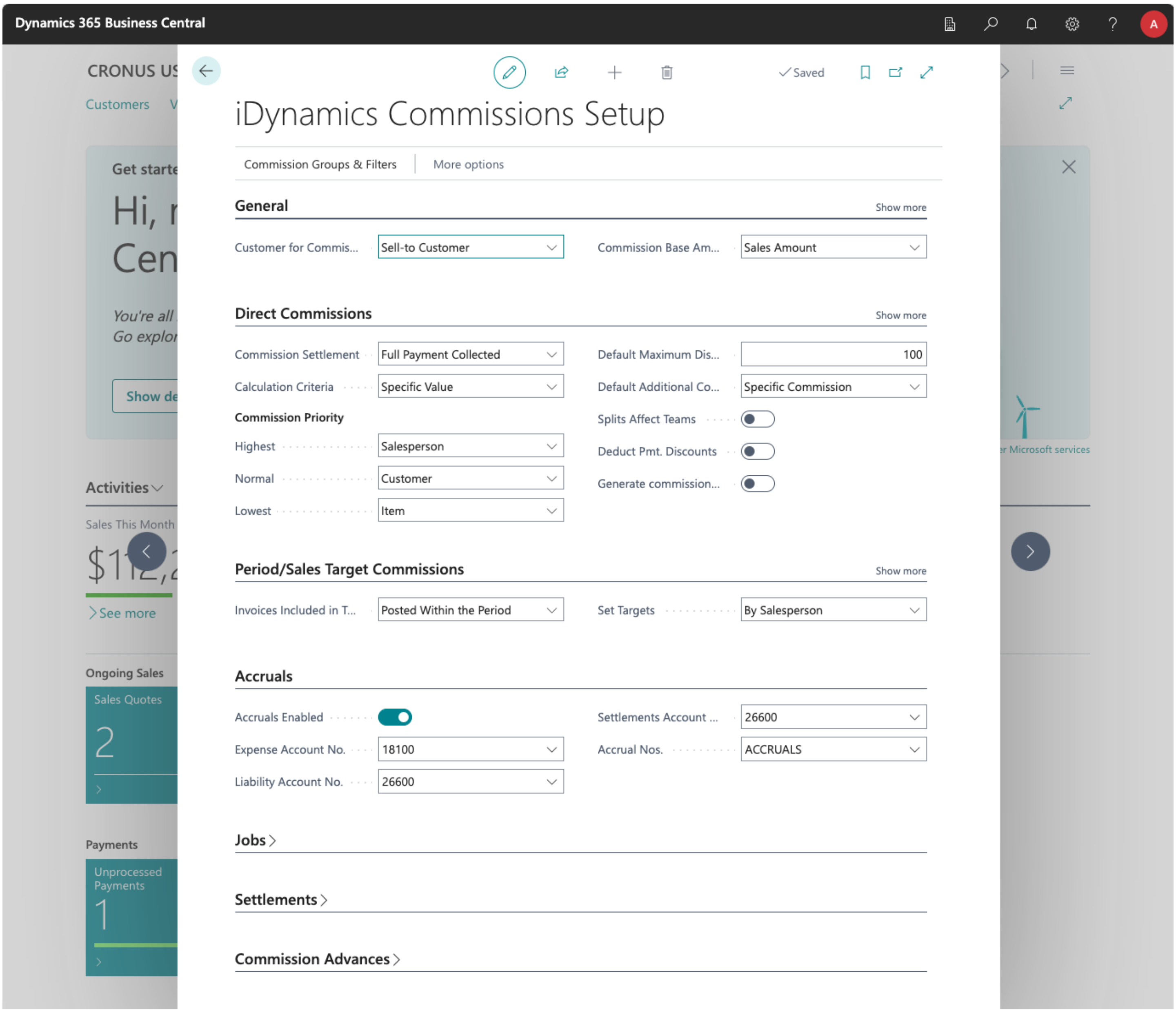
If you need to add extra filters or logic to the way the app calculates the rate that applies in each case, you can find info on how to do it in the developer's chapter of the manual.

The app has been designed so that these customizations can be easily done by customers with some development knowledge, by your partner, or by us if needed.

# iDynamics Commissions Setup

## General Setup

In the main setup page of the app, you will find a section called *Direct Commissions*, where you can define how direct commission rates will be applied and settled.

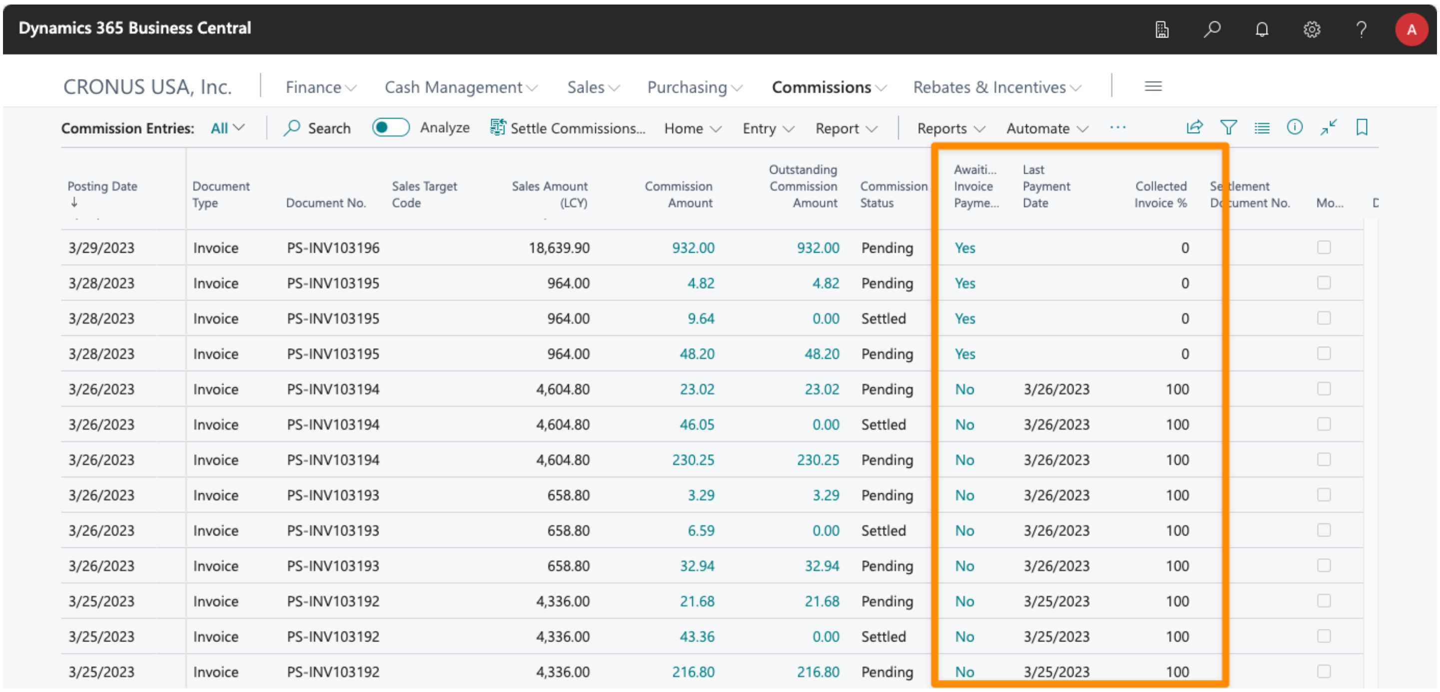



### Commission Settlement

Commission entries are always generated when a sales document is posted, but you can decide whether they can be settled immediately, or only after the customer has actually paid.

You can even choose that commissions can be paid when partial payments of an invoice have been received. This way, if the customer has paid 50% of an invoice, the salesperson can be paid 50% of the commissions generated by that invoice.

Depending on the value selected here, extra columns will appear in the commission entries list showing whether the customer has paid or not the source invoice (*Awaiting Invoice Payment*), or the % of the invoice that the customer has paid, as well as the date of the last payment received (*Last Payment Date* and *Collected Invoice %*).




| Posting Date | Document Type | Document No. | Sales Target Code | Sales Amount (LCY) | Commission Amount | Outstanding Commission Amount | Commission Status | Awaiti... Invoice Payme... | Last Payment Date | Collected Invoice % | Settlement Document No. | Mo... |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 3/29/2023 | Invoice | PS-INV103196 | | 18,639.90 | 932.00 | 932.00 | Pending | Yes | | 0 | | |
| 3/28/2023 | Invoice | PS-INV103195 | | 964.00 | 4.82 | 4.82 | Pending | Yes | | 0 | | |
| 3/28/2023 | Invoice | PS-INV103195 | | 964.00 | 9.64 | 0.00 | Settled | Yes | | 0 | | |
| 3/28/2023 | Invoice | PS-INV103195 | | 964.00 | 48.20 | 48.20 | Pending | Yes | | 0 | | |
| 3/26/2023 | Invoice | PS-INV103194 | | 4,604.80 | 23.02 | 23.02 | Pending | No | 3/26/2023 | 100 | | |
| 3/26/2023 | Invoice | PS-INV103194 | | 4,604.80 | 46.05 | 0.00 | Settled | No | 3/26/2023 | 100 | | |
| 3/26/2023 | Invoice | PS-INV103194 | | 4,604.80 | 230.25 | 230.25 | Pending | No | 3/26/2023 | 100 | | |
| 3/26/2023 | Invoice | PS-INV103193 | | 658.80 | 3.29 | 3.29 | Pending | No | 3/26/2023 | 100 | | |
| 3/26/2023 | Invoice | PS-INV103193 | | 658.80 | 6.59 | 0.00 | Settled | No | 3/26/2023 | 100 | | |
| 3/26/2023 | Invoice | PS-INV103193 | | 658.80 | 32.94 | 32.94 | Pending | No | 3/26/2023 | 100 | | |
| 3/25/2023 | Invoice | PS-INV103192 | | 4,336.00 | 21.68 | 21.68 | Pending | No | 3/25/2023 | 100 | | |
| 3/25/2023 | Invoice | PS-INV103192 | | 4,336.00 | 43.36 | 0.00 | Settled | No | 3/25/2023 | 100 | | |
| 3/25/2023 | Invoice | PS-INV103192 | | 4,336.00 | 216.80 | 216.80 | Pending | No | 3/25/2023 | 100 | | |

### Calculation Criteria

Decides whether the most specific commission will apply when several rules apply to a single sales line, or if the highest commission percentage will be used instead.

If you opt for the *Highest Commission*, the app will just use the highest percentage that has been configured for the sales line, *Lowest Commission* will use the lowest commission that applies to the line instead and, if *Specific Value* is selected, a new group of fields, *Commission Priority*, will be shown to choose which of the three different values that can define the commission rules will have the highest priority.

As there are several possible combinations, and in order to avoid doubts regarding the order in which they are applied, at the end of this chapter you will find an example of how priorities are applied.

### Default Maximum Discount

When defining commission rates, you can specify what is the maximum discount that can be applied before the rate stops applying. This field sets the default value that is assigned when a rate is created.

### Default Additional Commission Type

When adding additional salespeople to a sales document, you can choose between several ways in which they might get a commission (they might split commissions with the main salesperson, get a specific %, or get their full commission rate...).

Here, you can specify which type you use the most so that it is assigned by default when you add an additional salesperson.

### Split Affect Teams

When you specify that one salesperson should split commissions with another, you can choose whether this split will affect the main salesperson only, or if splits will also affect commissions defined for managers and other team roles (if the salespeople that split the commission belong to different teams).

### Deduct Pmnt. Discounts

Optionally, you can configure the app so that payment discounts affect commissions.

### Generate Commissions for Prepayments

You can configure the app so that prepayments generate commissions, based on the commissions calculated for the original sales document.

### Additional Options

The following options are available for advanced scenarios or are currently in disuse, and can be shown using the *Show more* link in the *Direct Commissions* tab.

- *Commissions Enabled*. You can use this to disable temporarily the generation of direct commissions.
- *Effective Commission Rounding*. This will be used when rounding the effective commission obtained from a sales document.
- *Delay Notice Margin*. In reports that show the payment status of the sales invoice, this lets you specify when its status will go from *pending* to *unpaid*. This margin will also be used when generating payment penalties.

### General Values

In addition to the values defined in the *Direct Commissions* section, two fields in the General section affect how commission rates are defined:

- *Customer for Commissions*. When we set direct commission rates for a specific customer, this defines whether we are talking about the sell-to customer or the bill-to customer.
- *Base Amount for Commissions*. As with the maximum discount, this sets whether (by default) direct commission rates are going to be defined for the sales line amount or the actual margin achieved. This value will also apply by default when setting a specific commission % for a sales line or an additional salesperson.

# Commission Priority

## Description

The calculation criteria option, in the main setup page, lets you decide whether the highest commission rate should apply to each sales line, or if the app should search for the commission rate that is *more specific*. E.g. in the second case, if a rate is configured for all items, and a rate is configured for item X, the second would always apply, regardless of the % configured for each one.

As you can choose a combination of salesperson, customer, and item when *Specific Value* is selected, a *Commission Priority* section appears on the setup card to define which one "wins" when there are conflicting rates (e.g. one for the specific salesperson and another for the specific customer).

As an example of how it works, if you configure a priority of Salesperson > Customer > Item (salesperson having the highest priority), iDynamics Commissions will use the *first* commission rate that it finds, looking for commission rates in the following order:

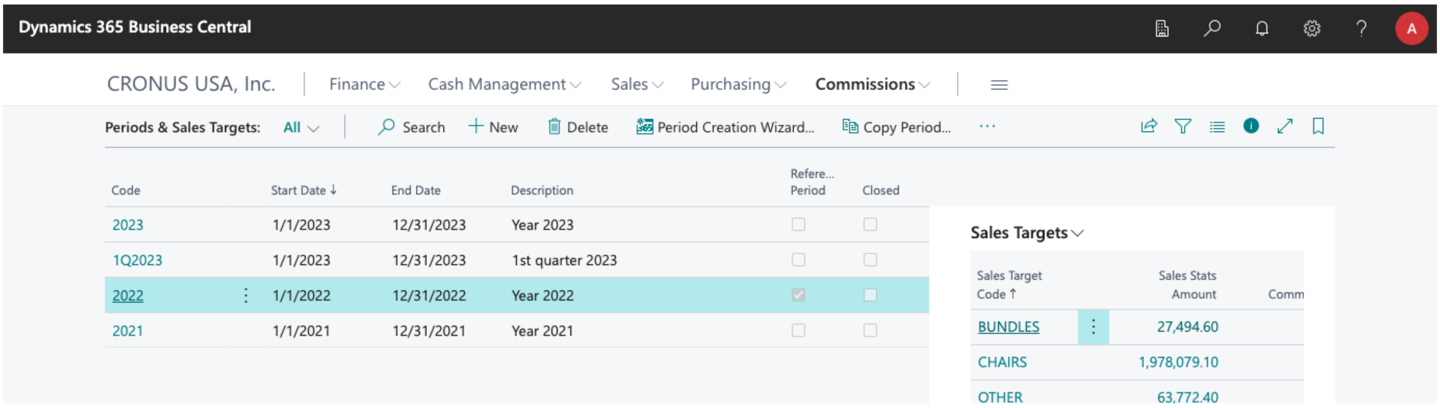
| SALESPERSON | CUSTOMER | ITEM |
| --- | --- | --- |
| No. | No. | No. |
| No. | No. | Group Code |
| No. | No. | All |
| No. | Group Code | No. |
| No. | Group Code | Group Code |
| No. | Group Code | All |
| No. | All | No. |
| No. | All | Group Code |
| No. | All | All |
| Group Code | No. | No. |
| Group Code | No. | Group Code |
| Group Code | No. | All |
| Group Code | Group Code | No. |
| Group Code | Group Code | Group Code |
| Group Code | Group Code | All |
| Group Code | All | No. |
| Group Code | All | Group Code |

| SALESPERSON | CUSTOMER | ITEM |
| --- | --- | --- |
| Group Code | All | All |
| All | No. | No. |
| All | No. | Group Code |
| All | No. | All |
| All | Group Code | No. |
| All | Group Code | Group Code |
| All | Group Code | All |
| All | All | No. |
| All | All | Group Code |
| All | All | All |

# Commission Periods

## Description

iDynamics Commissions lets you define periods for which you might want to get sales stats and/or define sales targets. You can access the list of commission periods using the *Periods & Sales Targets* option in the *Commissions* menu, or by searching for *Commission Periods* in Business Central.




## Configure

At its most basic, a period just requires a description and an end date. But you can also define *which* sales documents should be included when you define sales targets, among other things.

Learn about the different options available when defining periods

## Set a Reference Period

By defining a reference commission period you can get quick information on how sales and commissions are going for a salesperson, a sales team, or an item commission group, just to name a few.

Learn how to take advantage of sales stats by defining a reference period

## Copy Periods/Targets

Most often than not, you will set similar targets for different commission periods, adjusting the target amounts as needed. iDynamics Commissions includes tools to help you create new periods based on others previously defined.

Learn how to quickly create new periods by copying targets from a previous period

## Close a Period

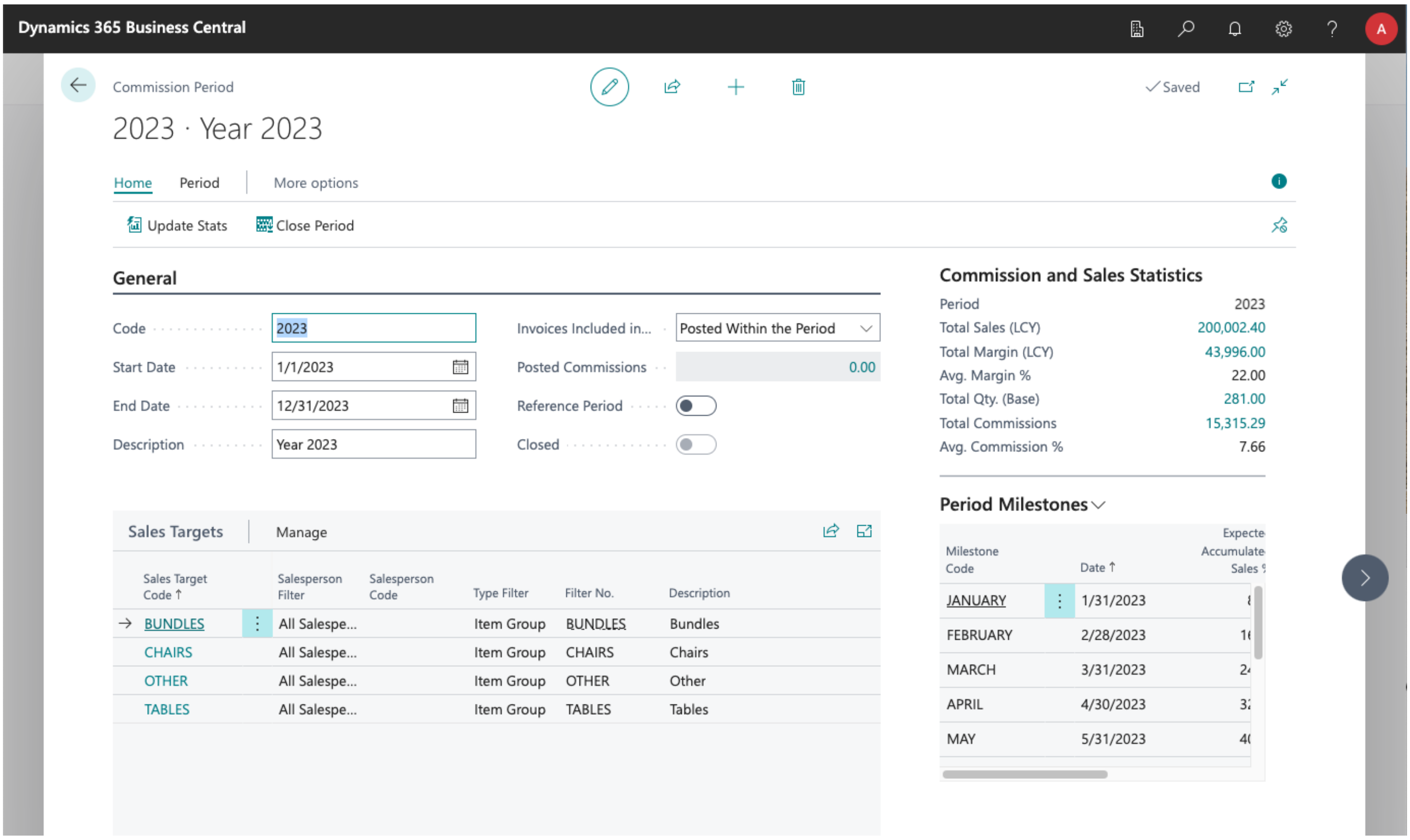
Once a period has finished and no more commissions are going to be posted for its sales targets, we recommend that you close it to avoid modifications and increase performance.

Learn how to close a period and why you should do it

# Period Configuration

## Description

At a minimum, a commission period consists of a start and end date, a description, and an option to specify whether sales targets will take into account invoices posted or collected within the period dates.




## Which Invoices Will Be Included?

By default all invoices posted within the dates included in the period will be considered for all sales targets defined. However, you can change this using the *Invoices Included in the Period* dropdown:

- *Posted Within the Period*. This is the default value (this can be changed in the commissions setup): all invoices posted within the period will be taken into account when calculating the margin achieved for each sales target.
- *Posted Within the Period (If Paid)*. Similar to the previous one, but invoices will only be taken into account once they are paid by the customer. This means that the achieved amount can keep increasing after the actual period ends.
- *Paid Within the Period*. Only invoices completely paid within the period will be included in it, regardless for when they were posted.
- *Partially Paid Within the Period*. This will take into account partial payments, so that an invoice can actually count towards the targets in different periods, if part of the invoice was paid in one period and the rest in another.

## Define Milestones

This is totally optional, but you can define milestones within a period (or a specific sales target). This is useful if you are going to define sales targets for a period (e.g. a year) but pay commissions multiple times before the period ends (e.g. monthly).

Any milestones defined for the period will be inherited by its sales targets so that you don't have to define them multiple times. You can learn more about how to use milestones in the sales targets chapter of the manual, and you can check the sales/commissions by salesperson report to see the kind of reports that you can get when milestones have been defined.

## Set Sales Targets

Finally, we can define sales targets for the period, using the *Manage* > *New* option in the *Sales Targets* list. You can set as many targets as you need for each period.

## Other options

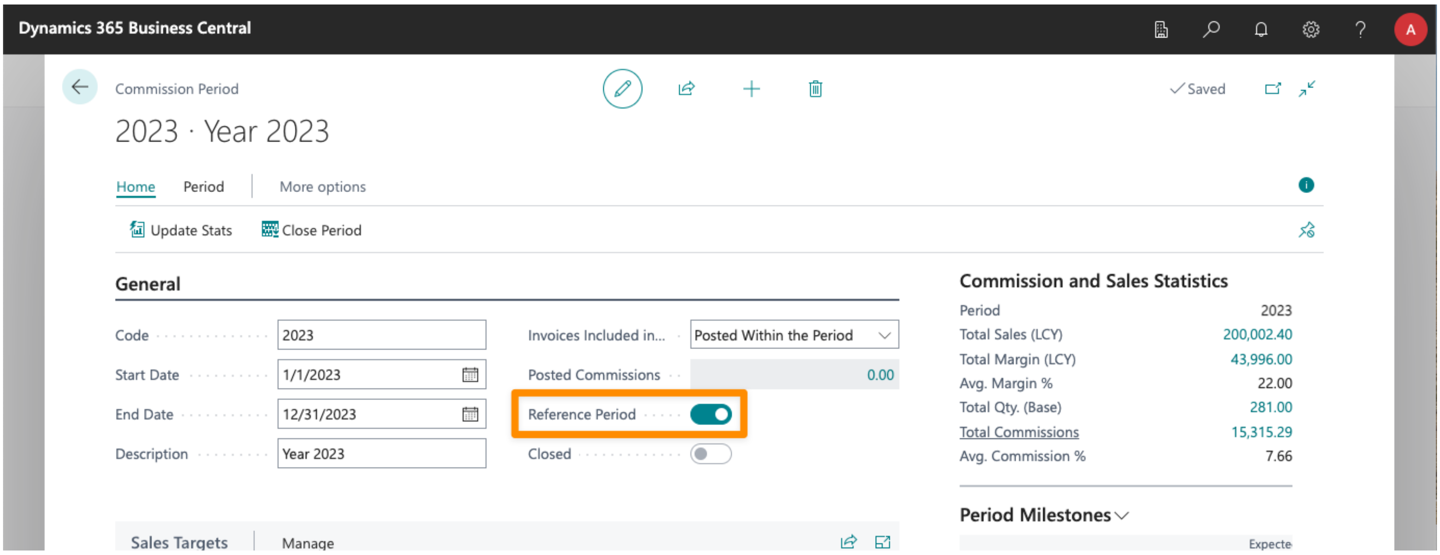
You can configure a period as the reference period, and you can close it so that it cannot be edited and its sales stats stop being updated. Both of these options are explained in their respective sections of this chapter.

# Reference Period

## Description

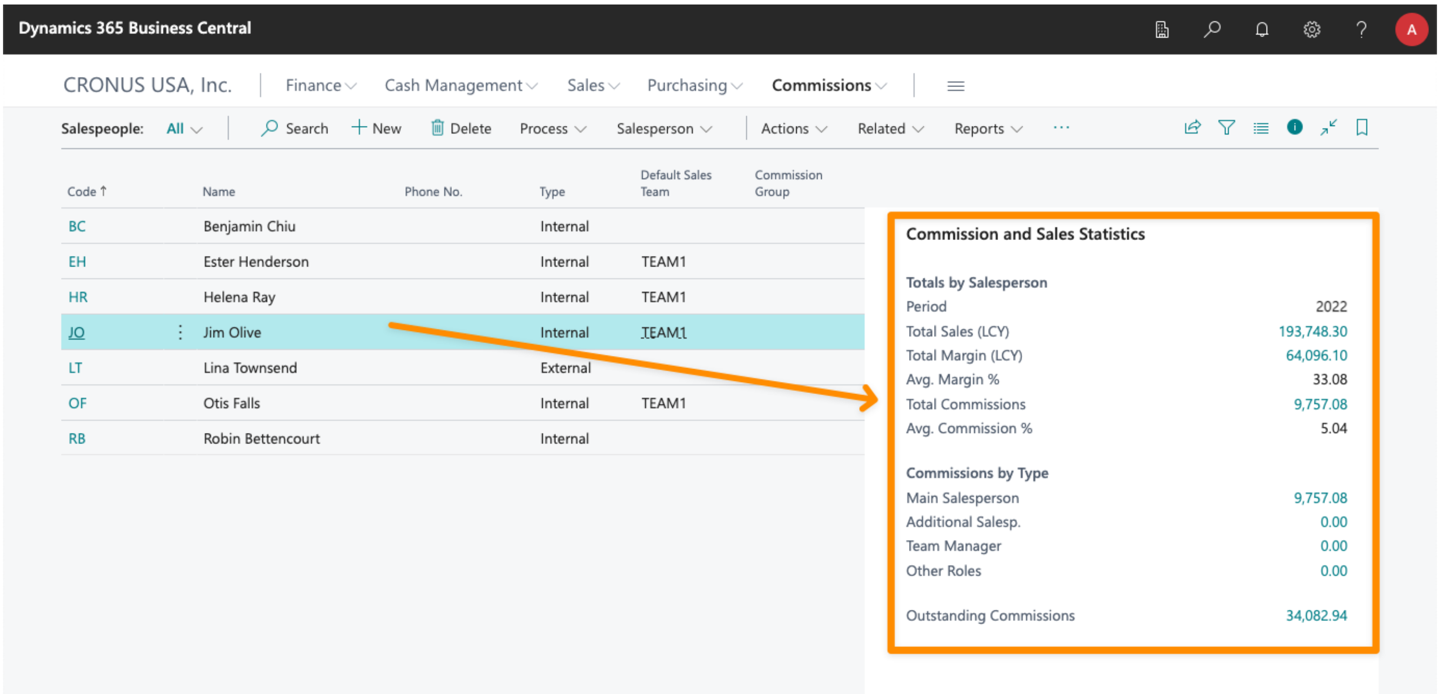
By defining a reference commission period you can get quick information on how sales and commissions are going for a salesperson, a sales team, or an item commission group, just to name a few.

We recommend that you configure a reference period, regardless of whether you are going to define sales targets for it, or not.




Once a reference period has been set, these lists will include a factbox showing a summary of sales and commission for the selected record, in this period:

- Items.
- Sales Teams.
- Salespeople.
- Customers.
- Item Commission Groups.
- Salesperson Commission Groups.
- Customer Commission Groups.




This means that you can quickly check the amount of sales for an item or item group during the reference period, the amount of sales achieved by a sales team or salesperson, or the commissions posted for them, just to give you a few examples.

**NOTE**

Only once period can be selected as the reference period. If you check a new period as the *reference* period, the previous reference period will be automatically deselected as such.

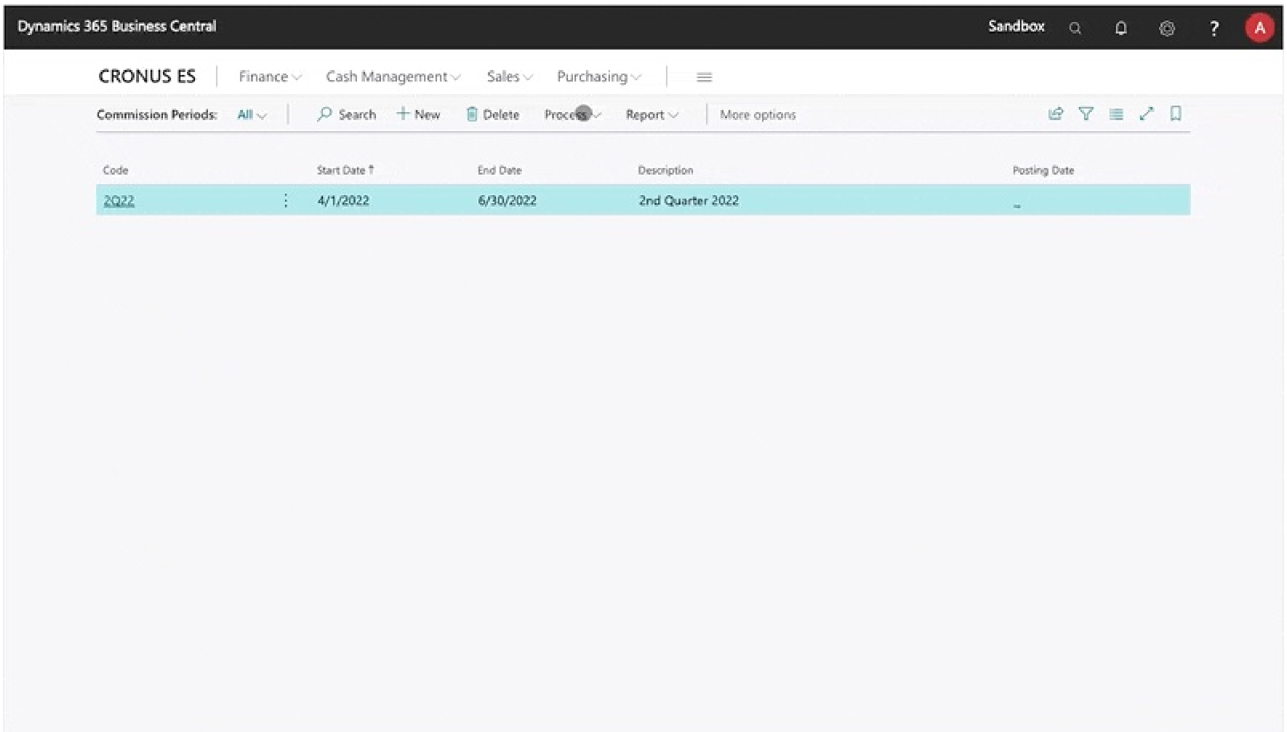
# Copy Periods & Sales Targets

## Description

Most often than not, you will set similar targets for different commission periods, adjusting the target amounts as needed. iDynamics Commissions includes tools to let you create new periods and targets based on previously defined targets.

## Copy a Period

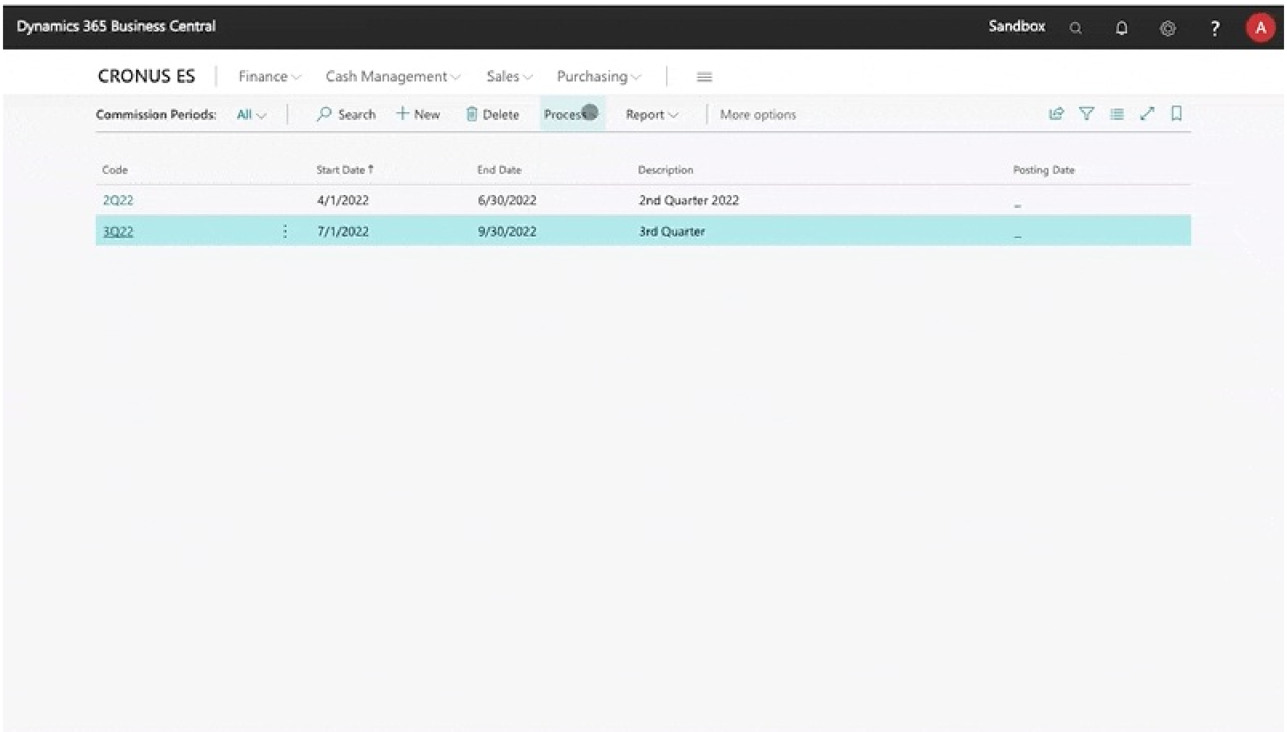
Use the action available in the period list to copy a period and all its sales targets.




## Period Creation Wizard

If the copy action lets you copy a period, and its targets, into a new one, the wizard lets you create multiple periods at once, assigning their start and end dates automatically.

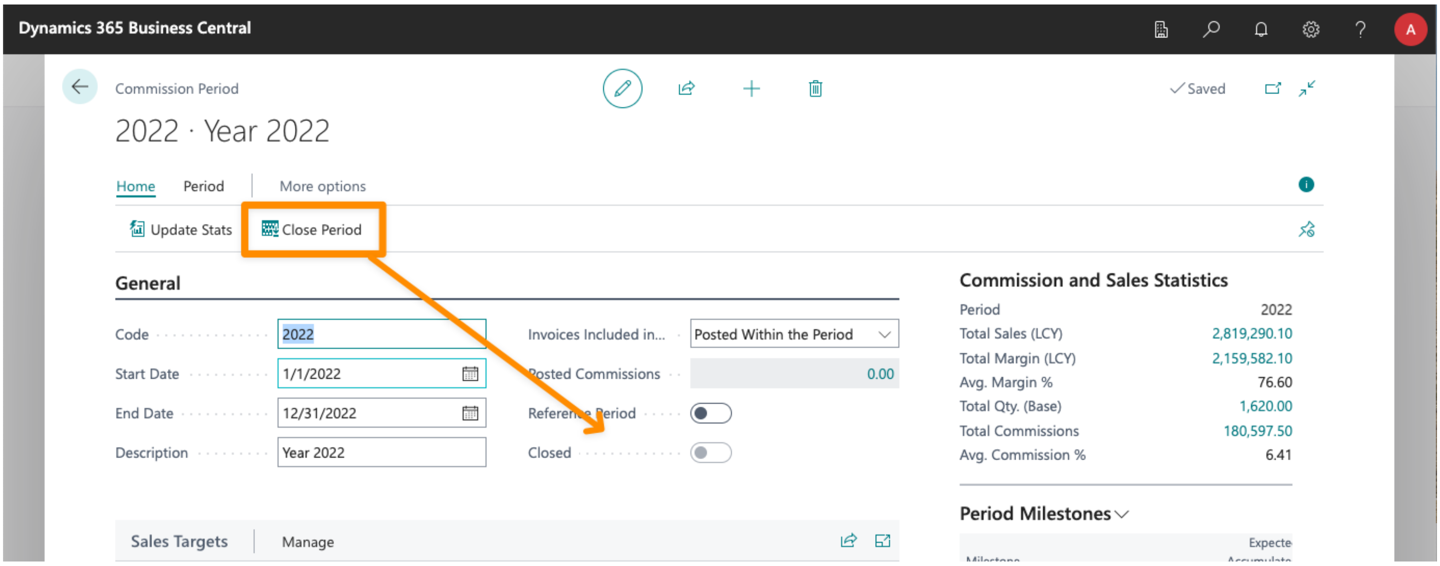
Use this action to create monthly or quarterly periods quickly, based (optionally) on a previously defined period.


Dynamics 365 Business Central
Sandbox
A
CRONUS ES
Finance
Cash Management
Sales
Purchasing
Commission Periods:
All
Search
New
Delete
Process
Report
More options
Code
Start Date
End Date
Description
Posting Date
2Q22
4/1/2022
6/30/2022
2nd Quarter 2022
3Q22
7/1/2022
9/30/2022
3rd Quarter

# Close a Period

## Description

When you define sales targets for a period, their stats will be automatically updated periodically in the background. As this can be a time-consuming process, we recommend that you close periods once they have passed and no further commissions are going to be posted. Locking will stop updating its stats (and thus improve general performance), and will also prevent users from updating any data related to the period (milestones, targets, ...).




> **NOTE**
>
> Closed periods can be reopened again by clicking on the *Reopen Period* action, that will be shown instead of the *Close Period* action, when a period is closed.

# Sales Target Commissions

## Description

iDynamics Commissions lets you set two different types of commissions: direct commissions, or sales target commissions. The latter, detailed in this chapter, are commissions generated for a salesperson when they achieve sales targets set for a commission period.

In this video we show you how to create commission periods and define sales targets commissions:

## Commission Periods

The first step, if you haven't done so yet, is to define a period on which those targets must be achieved.

Check the previous chapter to learn how to define commission periods

## Set Targets

Once you have a period, you can define multiple sales targets based on the same filters that you would apply when creating direct commission rates, and give a different commission percentage based on the total sales achieved by each salesperson.

Learn how to set sales targets

## Set Common Targets

For scenarios where you can set the same sales target amount for everyone affected by it, you can simplify the setup by setting global target amounts for everyone.

Learn how to set common targets for everyone

## Define Milestones

This is totally optional, but you can define milestones within a period (or a specific sales target). This is useful if you are going to define targets for a period (e.g. a year) but pay commissions multiple times before the period ends (e.g. monthly). If you want to configure such a scenario, please check this section to learn the features that you will unlock by defining milestones.

Learn more about period milestones

## Sales Target Stats

As invoices and credit memos are posted, sales stats for each target will be updated in order to show how each salesperson is performing. As generating these stats is a complex process, iDynamics Commissions uses a scheduled task that updates them regularly.

Learn about sales targets stats and how/when they are updated

## Post Commissions

At any time, you can post the commissions corresponding to the targets achieved by each salesperson. If posted before the end of the period, the next time the process is run commissions will be generated for the new sales achieved since then.

Learn how to post sales target commissions

## Sales Target Codes

When setting targets for different periods, you can use the same target codes, to get reports on them. As an example, let's say that your company works with quarterly periods, and you set targets for code *FURNITURE* in all of them. After a year has passed, the app will let you run reports that show you how sales and commissions for furniture items have evolved during the last four quarters.

Learn more about sales target codes

## Examples

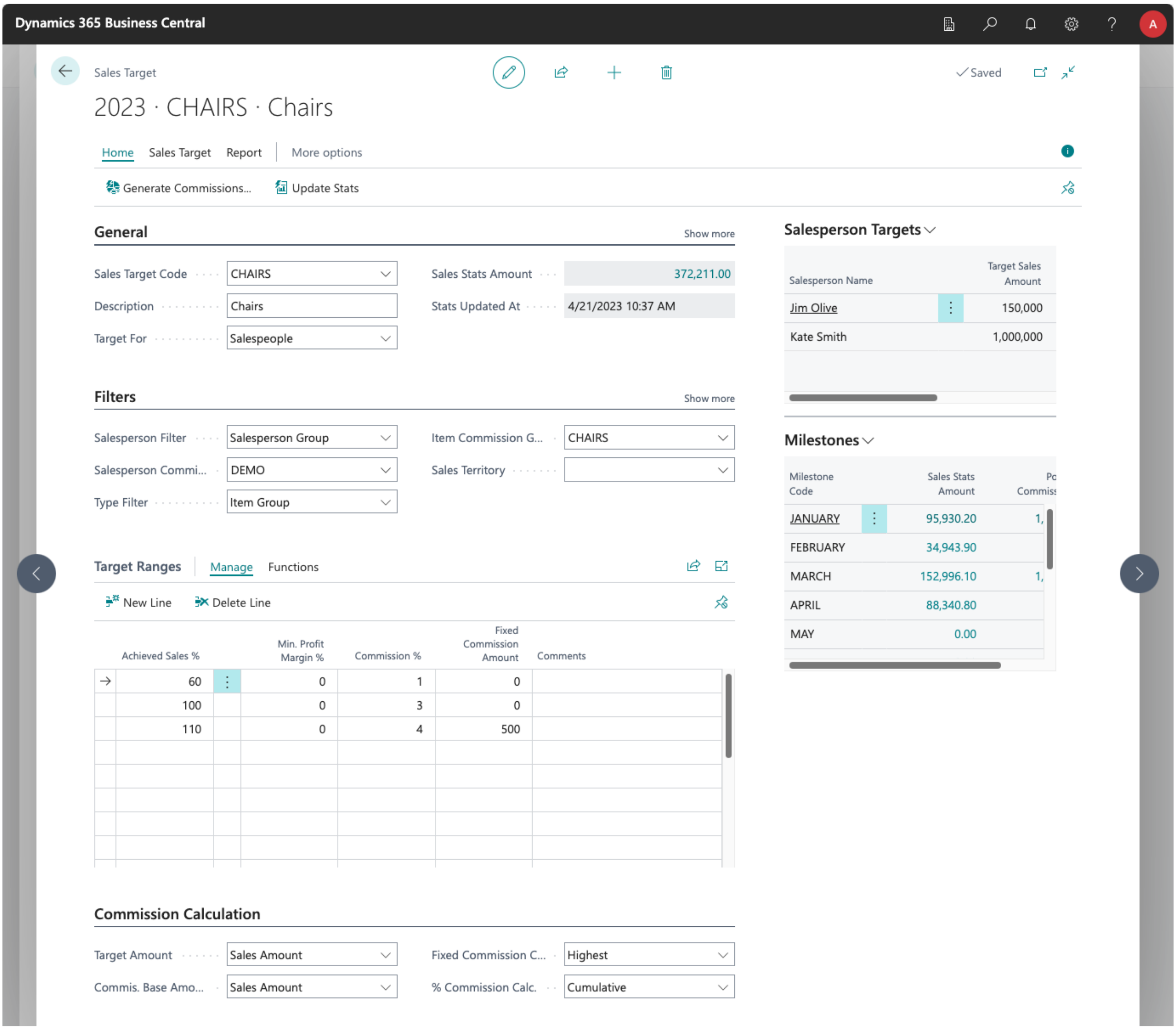
The best way to learn how to use an app is through examples. Here you will find some simple, but popular, types of sales targets that can be defined with iDynamics Commissions.

Review a few configuration examples of sales targets

# Define Sales targets

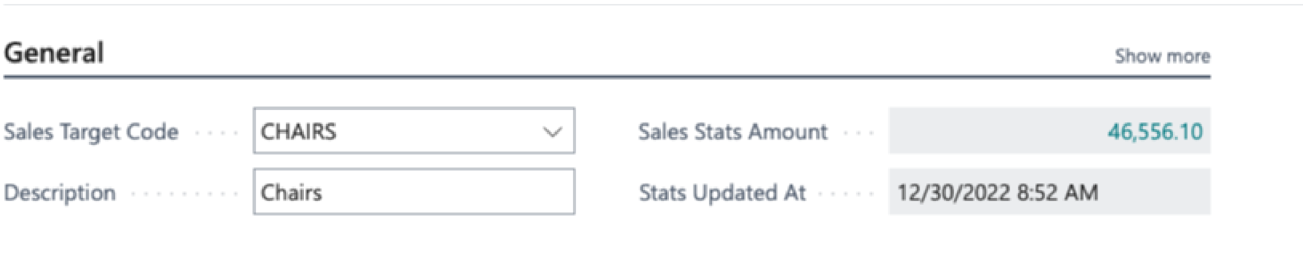
## Description

Sales targets let you define which combination of sales lines/customers/salespeople will be included. In addition, you can set different target ranges, so that the commission to apply is different depending on sales achieved by each salesperson.




## Code and Description

In the *General* tab of the sales target card, you must assign a target code and a description for the sales target. Optionally, by clicking on the *Show more* option of the tab, you can also specify whether each salesperson is going to have their own sales target amount, or if you are going to set common targets for everyone.

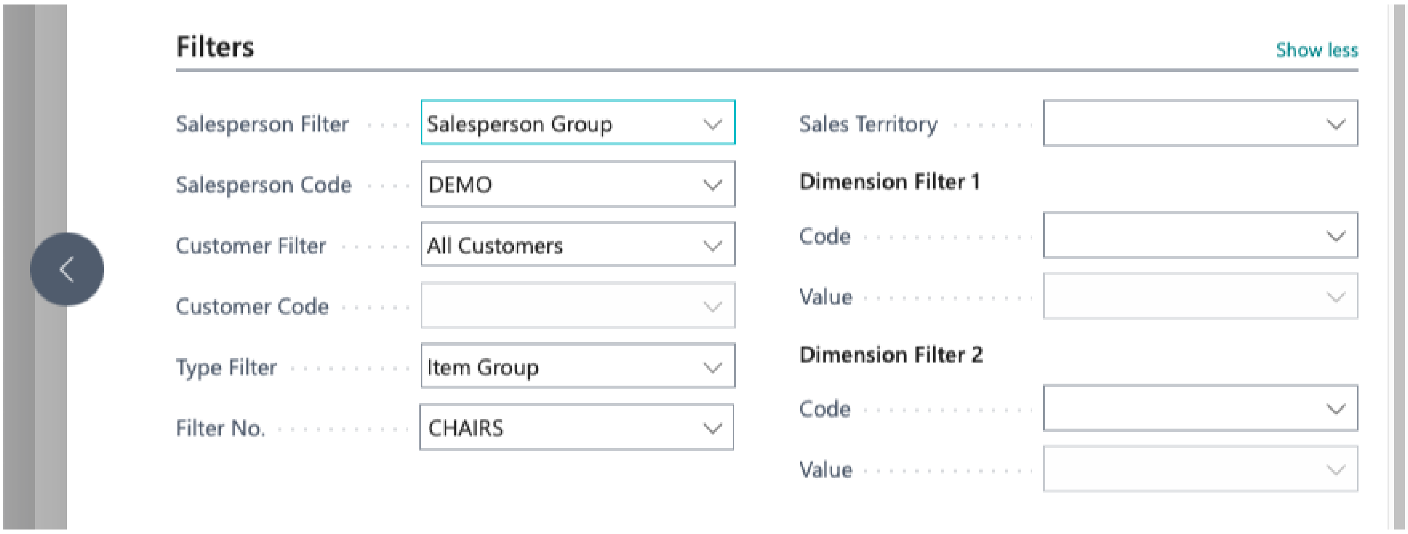



Sales target codes are defined in a master table in order to reuse them in different periods. As an example, let's say that your company works with quarterly periods, and you set targets for code *FURNITURE* in all of them. After a year has passed, the app will let you run reports that show you how sales and commissions for furniture items have evolved during the last four quarters.

In this tab, you can also see the amount of sales that match the selected filters (after stats have been updated and commissions have already been posted for the target).

# Filters

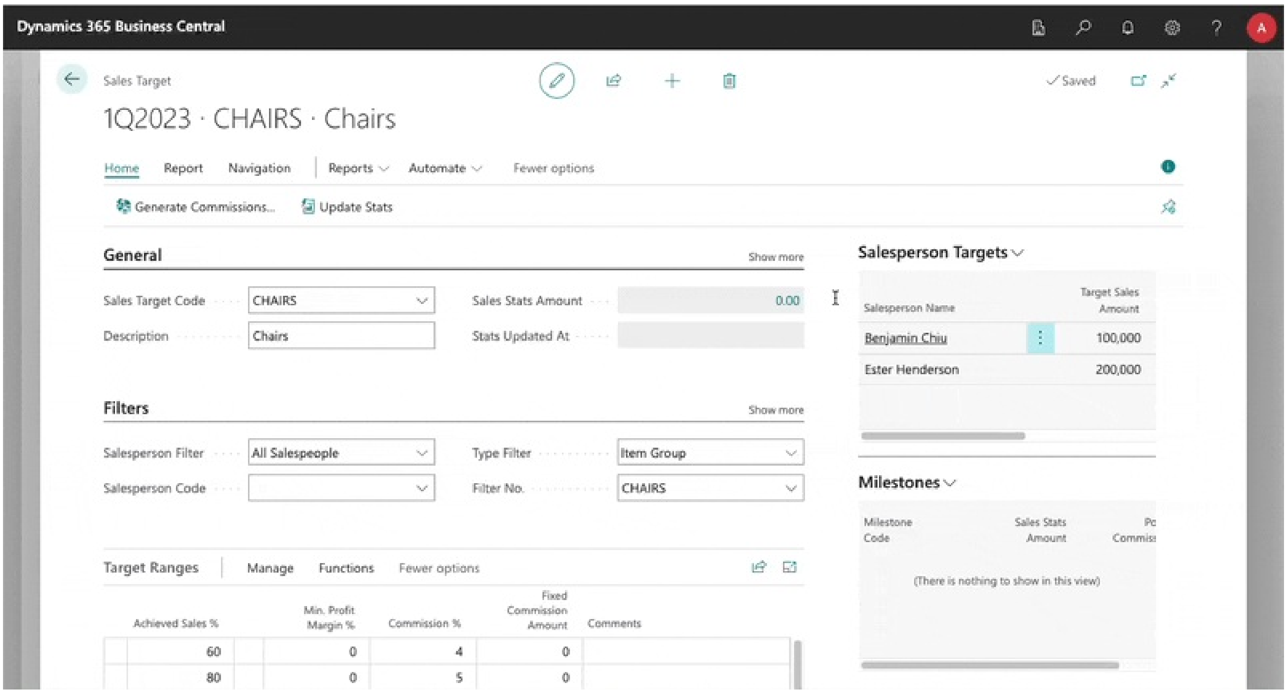
Just like direct commission rates, these filters let you choose which sales will be used to calculate which targets have been achieved.




Only sales lines that match the conditions defined here will be taken into account when adding amounts for the targets defined below.

# Individual Salesperson Targets

When the target has been configured to be *By Salesperson*, a factbox shows the individual targets assigned to each salesperson. Click on the title of the factbox, and choose *Edit* to set the sales amount that each salesperson should try to achieve during this period, for the selected filters.

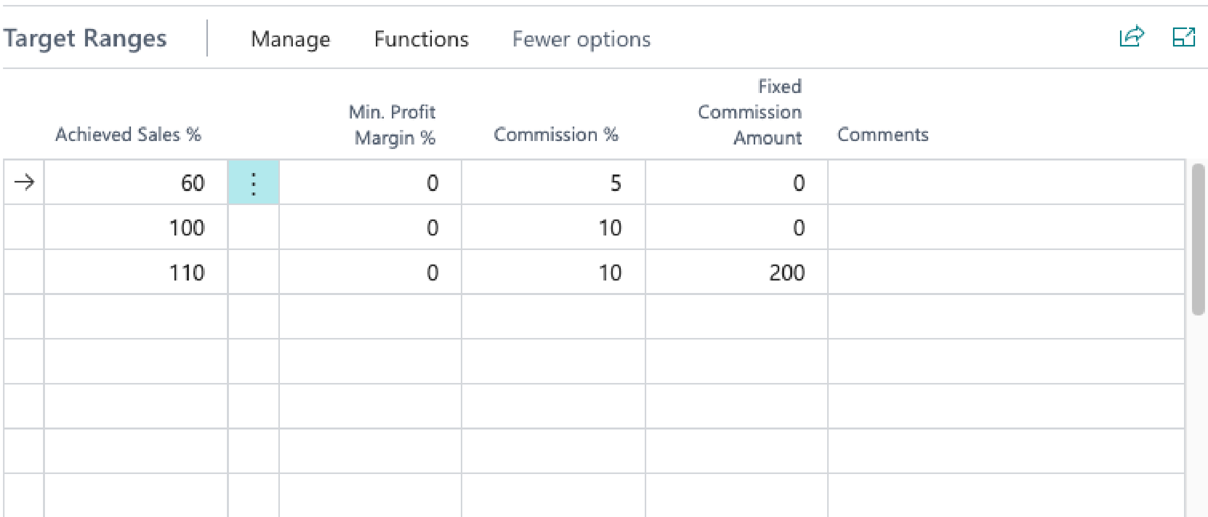



Setting Targets Based on Quantity Sold

iDynamics Commissions allows you to define targets based on the quantity sold in the commission unit of measure of the elements included in the target, but the *Target Quantity* column is hidden by default. Just *Personalize* the page and make it visible to set salesperson targets based on quantity.

# Target Ranges

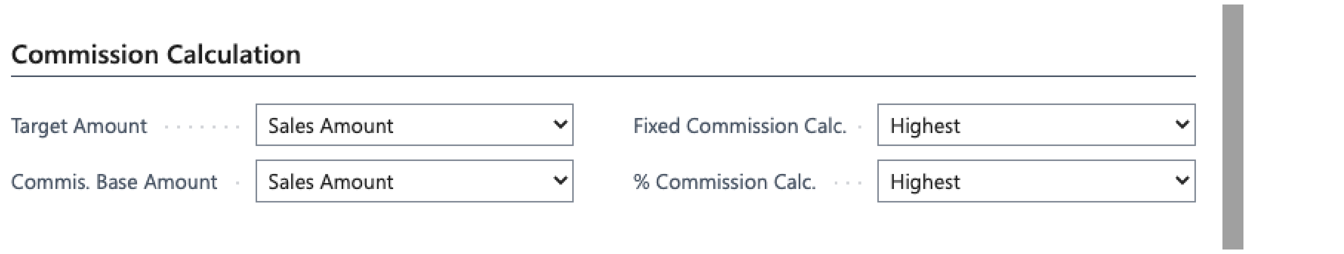
Once sales targets have been set for each salesperson, you can define the commission that they will receive depending on the % of the target amount that has been achieved.




When the commission generation process is run, the app will add up, for each salesperson, all sales within the period that match the specified filters. Then, it will check which of the assigned targets have been met and, based on the specified calculation criteria, generate the corresponding commission entries.

# Advanced Commission Calculation

Here you can configure how sales targets will be calculated and how commissions will be applied.




#### Target Amount

Lets you specify whether the minimum amounts specified are for the total amount of sales that each salesperson has achieved, or for the actual total profit margin generated by those sales.

#### Commission Base Amount

Just like the target amount, the commission % can be applied to the total sales amount or the total profit margin. They can be combined so that targets can be set based on the total sales amount, but the commission % will be applied to the generated profit.

#### Fixed Commission Calculation

If several targets are set, setting this value to *Highest* means that each salesperson will get the highest fixed commission amount assigned to all achieved targets. *Cumulative* will sum the fixed commission amount assigned to all of them instead.

#### % Commission Calculation

If several targets are set, setting this value to *Highest* means that each salesperson will get the highest commission % assigned to all achieved targets.

If *Tiered* is selected, the total sales amount achieved will be split into ranges (based on the amounts set as targets), and a different percentage will be applied to each one.

On the examples page, you will find several examples that should help you clear up the different options explained in the previous paragraphs.

Note: if *tiered* is selected, and multiple targets with the same minimum amount are set, for each range the app will apply the one with the highest commission % (that has been achieved).

## Target Milestones

While milestones will usually be configured for the period, so that they are shared for all sales targets in it, they can also be defined for specific sales targets. As with *Salesperson Targets*, just click on the title of the factbox and choose *Edit* to edit the milestones assigned to the sales target.

> **NOTE**
>
> If you are going to define multiple targets (for different item groups, for example), and all of them will use the same milestones, we recommend that you configure them on the period, as period milestones will be automatically inherited by all targets.

You can learn more about milestones and how to use them here.

## Dimensions

Any dimensions set here will be assigned to any commission entries generated for this period/sales target.

## Dimensions

Department Code

Customergroup Code

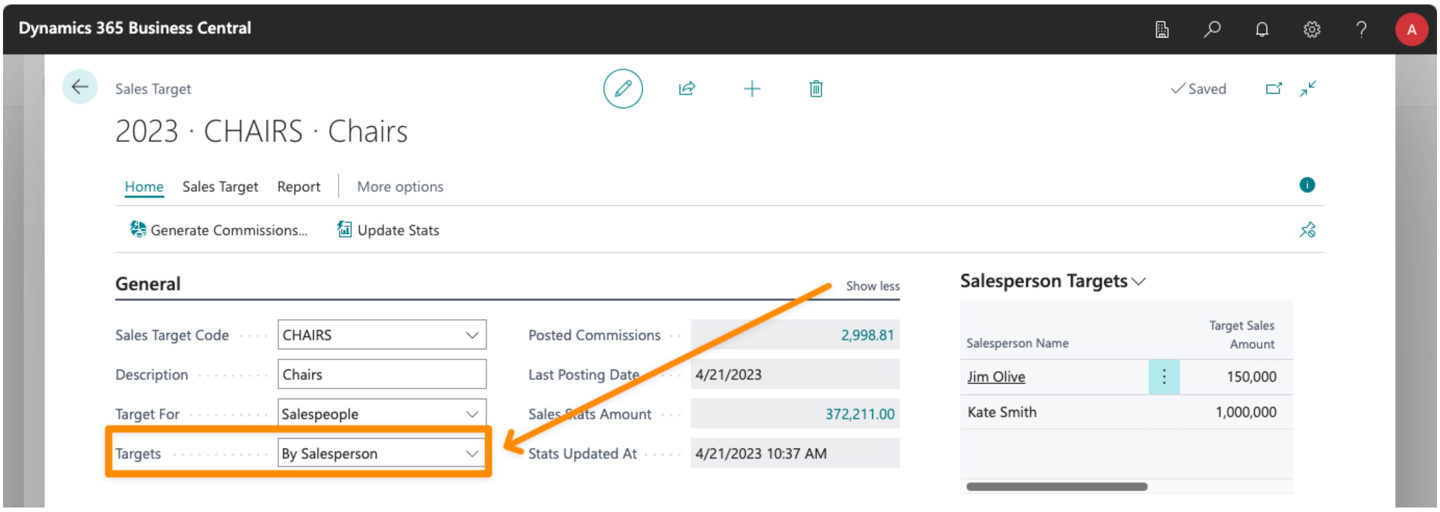
# Set Common Sales Targets

## Description

In the previous section of this chapter, we have seen how we can set targets for a period, specifying the expected sales amount for each salesperson.

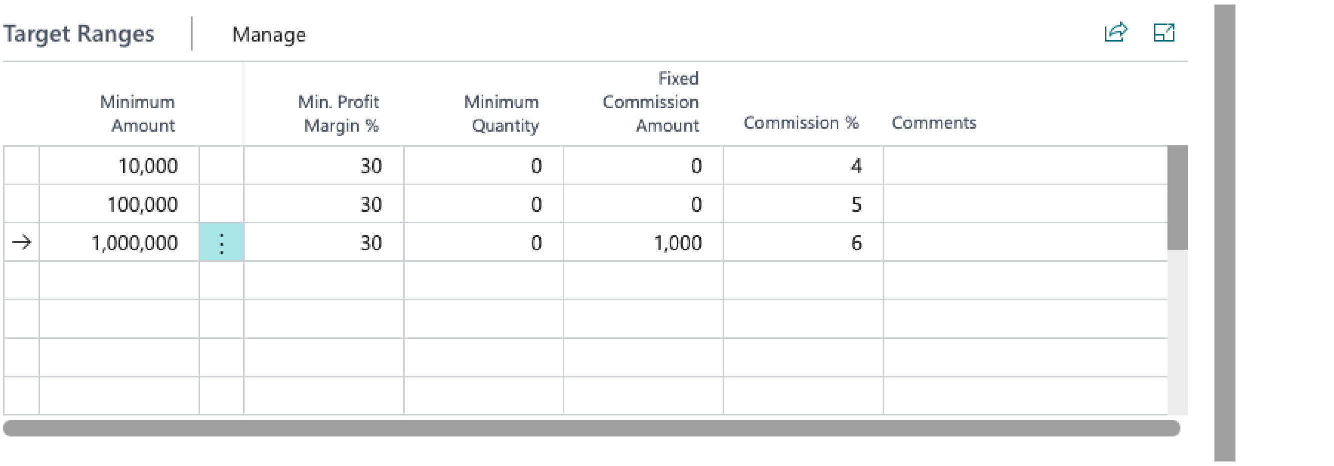
In cases where a sales target is configured for a specific group of salespeople, though, you might want to simplify this setup and just set a global sales target amount for everyone.

This can be selected by changing the *Targets* option, in the sales target *General* tab, from *By Salesperson* to *For Everyone* (you can specify the default value for this field in the main setup page).




## Target Lines

Once the target has been configured to be *For Everyone*, you will see that the columns available in the list change, and a *Minimum Amount* column replaces the previous *Achieved %* column.




Here, you can specify the exact amount that should be achieved by any salesperson, in order to get the commissions configured for that line.

A few details to take into account:

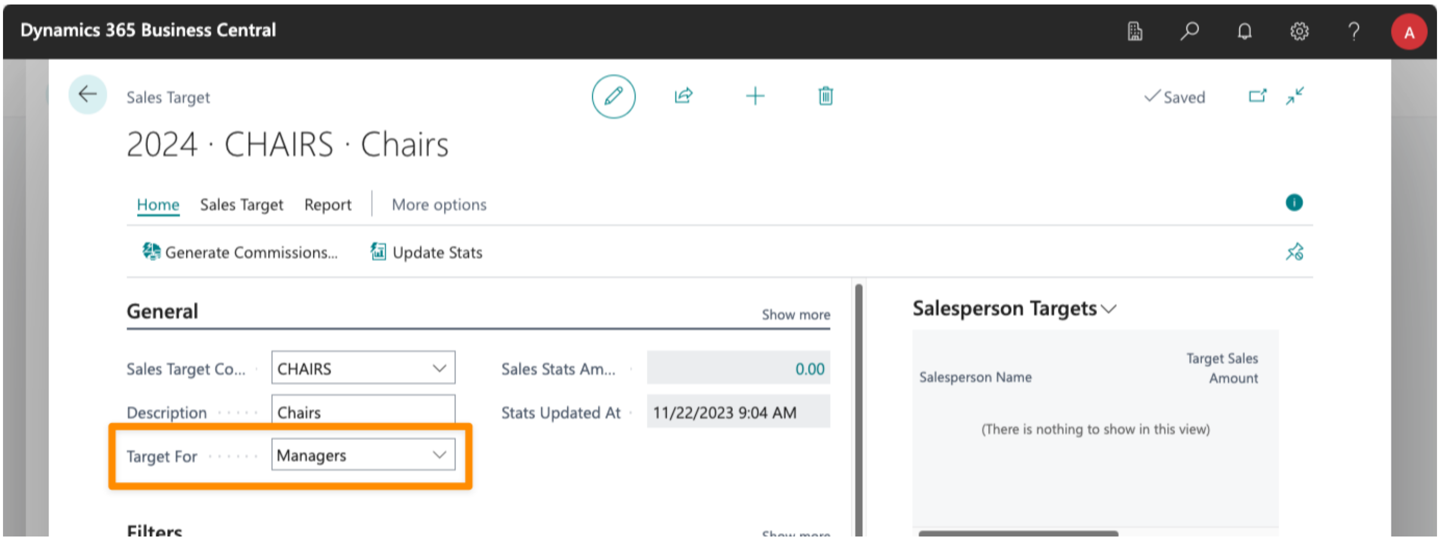
- As with targets set by salesperson, you can *Personalize* the page to show the *Minimum Quantity* column, if you want to set targets based on quantity.
- If you have defined milestones for the period, you will have an additional column on the list called *Reference Target*. Only one line can be set as reference, and will be used in the sales and commissions report to show the expected amount for each

milestone.

# Set Targets for Managers/Roles

## Description

Targets can be set not only for your salespeople but also for their managers (and other roles within their teams).




If you specify that a *target is for managers* in a sales target, all sales that match the selected filters will be taken into account, but the amounts will be assigned to the manager of the salesperson who achieved each sale.

The same thing will happen if you select that the *target is for a sales role*: the app will filter all sales that match the selected filters, check whether the salesperson assigned to the document is assigned to a team, and the team has someone with that role, and if that's the case, the amount will be assigned to that person.

Other than that, the sales target will work just as explained in the previous pages of this chapter of the manual, so you can set tiered targets, milestones and the rest of the options available for individual salespeople.

## Who is the Manager?

When the sales amounts for the target are calculated, the app will loop over all sales documents/lines that match the selected filters, within the period. For each document, it will check if there is a team assigned and, if there is, who is the manager for the team.

If the document/line is assigned to a team, and it has a manager, the sales amount will be assigned to them.

## Assigning Targets to a Role

When a target is assigned to a role, the app will execute the same process as with managers, but instead of checking who is the manager of the team, it will check whether there are any salespeople with the assigned role.

If no one in the team has the selected role, the line will be skipped. If one or more salespeople have the selected role, the sales amount will be assigned to them.

Note that this means that, if there is a line with a $1000 amount, and there are two salespeople with the selected role, the $1000 will be assigned to both of them (the amount will not be split).

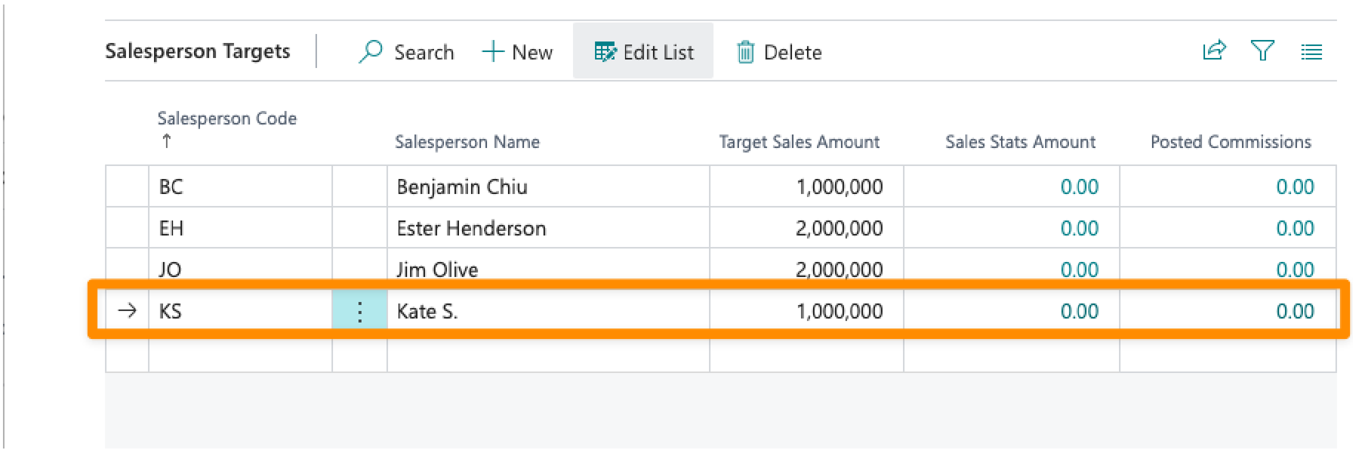
# Sales Target Milestones

## Description

Milestones let you define the expected sales that each salesperson should have achieved at specific dates within the period. This lets you get reports that show how each salesperson is performing at the end of each milestone, as well as give commissions based on their expected final sales.

A Practical Example

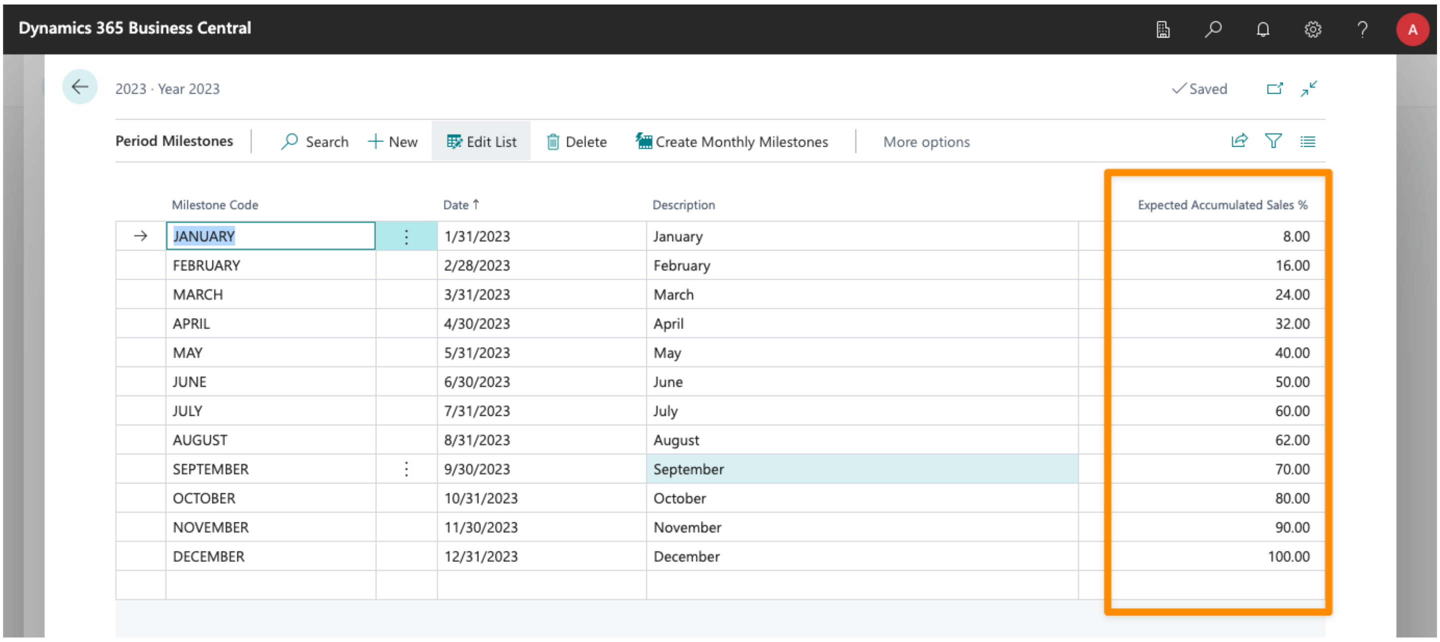
What does this mean? Let's say that you set a sales target of $1,000,000 for Kate S., for the whole year.




Once this target has been set, you define the following target tiers:


At the end of January Kate has achieved $85,000 in sales, and the company pays commissions monthly. Kate hasn't met 60% of her target yet, so she will get no commission from those sales.

Now, let's define these milestones, by going back to the period card, and clicking on *Edit*, on the *Milestones* factbox:


Dynamics 365 Business Central

2023 · Year 2023

✓ Saved

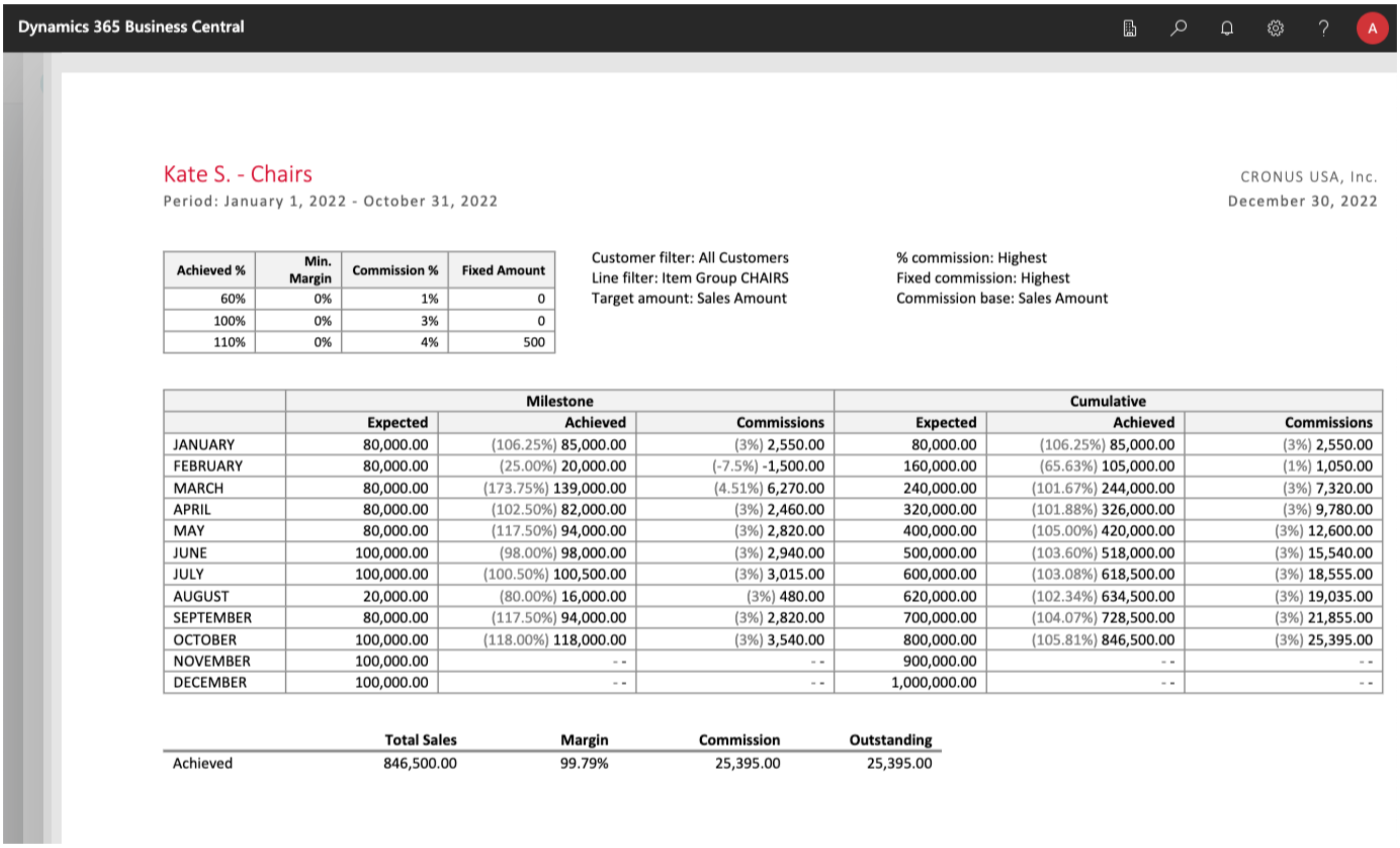
Period Milestones | Search | + New | Edit List | Delete | Create Monthly Milestones | More options

| Milestone Code | Date ↑ | Description | Expected Accumulated Sales % |
|---|---|---|---|
| JANUARY | 1/31/2023 | January | 8.00 |
| FEBRUARY | 2/28/2023 | February | 16.00 |
| MARCH | 3/31/2023 | March | 24.00 |
| APRIL | 4/30/2023 | April | 32.00 |
| MAY | 5/31/2023 | May | 40.00 |
| JUNE | 6/30/2023 | June | 50.00 |
| JULY | 7/31/2023 | July | 60.00 |
| AUGUST | 8/31/2023 | August | 62.00 |
| SEPTEMBER | 9/30/2023 | September | 70.00 |
| OCTOBER | 10/31/2023 | October | 80.00 |
| NOVEMBER | 11/30/2023 | November | 90.00 |
| DECEMBER | 12/31/2023 | December | 100.00 |

At the end of January, each salesperson is expected to have achieved 8% of their yearly target. This means that, at the end of January, Kate is expected to have sold $80,000. As this amount has been achieved, and Kate is on track to achieve her yearly target, a 3% commissions, on the $85,000 sold, will be given to her when commissions are posted for January.

These amounts will be adjusted each month: if she falls below her target for February, she might get a negative commission amount as she falls from 3% to 1%. But she would recover them in March if she achieved her target again that month.

All of this info will also be detailed in the [sales/commissions by salesperson report, which will include detailed info on how each salesperson is performing each month:


Dynamics 365 Business Central

Kate S. - Chairs

Period: January 1, 2022 - October 31, 2022

CRONUS USA, Inc.

December 30, 2022

| Achieved % | Min. Margin | Commission % | Fixed Amount |
|---|---|---|---|
| 60% | 0% | 1% | 0 |
| 100% | 0% | 3% | 0 |
| 110% | 0% | 4% | 500 |

Customer filter: All Customers
Line filter: Item Group CHAIRS
Target amount: Sales Amount

% commission: Highest
Fixed commission: Highest
Commission base: Sales Amount

| | Milestone | | | Cumulative | | |
|---|---|---|---|---|---|---|
| | Expected | Achieved | Commissions | Expected | Achieved | Commissions |
| JANUARY | 80,000.00 | (106.25%) 85,000.00 | (3%) 2,550.00 | 80,000.00 | (106.25%) 85,000.00 | (3%) 2,550.00 |
| FEBRUARY | 80,000.00 | (25.00%) 20,000.00 | (-7.5%) -1,500.00 | 160,000.00 | (65.63%) 105,000.00 | (1%) 1,050.00 |
| MARCH | 80,000.00 | (173.75%) 139,000.00 | (4.51%) 6,270.00 | 240,000.00 | (101.67%) 244,000.00 | (3%) 7,320.00 |
| APRIL | 80,000.00 | (102.50%) 82,000.00 | (3%) 2,460.00 | 320,000.00 | (101.88%) 326,000.00 | (3%) 9,780.00 |
| MAY | 80,000.00 | (117.50%) 94,000.00 | (3%) 2,820.00 | 400,000.00 | (105.00%) 420,000.00 | (3%) 12,600.00 |
| JUNE | 100,000.00 | (98.00%) 98,000.00 | (3%) 2,940.00 | 500,000.00 | (103.60%) 518,000.00 | (3%) 15,540.00 |
| JULY | 100,000.00 | (100.50%) 100,500.00 | (3%) 3,015.00 | 600,000.00 | (103.08%) 618,500.00 | (3%) 18,555.00 |
| AUGUST | 20,000.00 | (80.00%) 16,000.00 | (3%) 480.00 | 620,000.00 | (102.34%) 634,500.00 | (3%) 19,035.00 |
| SEPTEMBER | 80,000.00 | (117.50%) 94,000.00 | (3%) 2,820.00 | 700,000.00 | (104.07%) 728,500.00 | (3%) 21,855.00 |
| OCTOBER | 100,000.00 | (118.00%) 118,000.00 | (3%) 3,540.00 | 800,000.00 | (105.81%) 846,500.00 | (3%) 25,395.00 |
| NOVEMBER | 100,000.00 | - - | - - | 900,000.00 | - - | - - |
| DECEMBER | 100,000.00 | - - | - - | 1,000,000.00 | - - | - - |

| | Total Sales | Margin | Commission | Outstanding |
|---|---|---|---|---|
| Achieved | 846,500.00 | 99.79% | 25,395.00 | 25,395.00 |

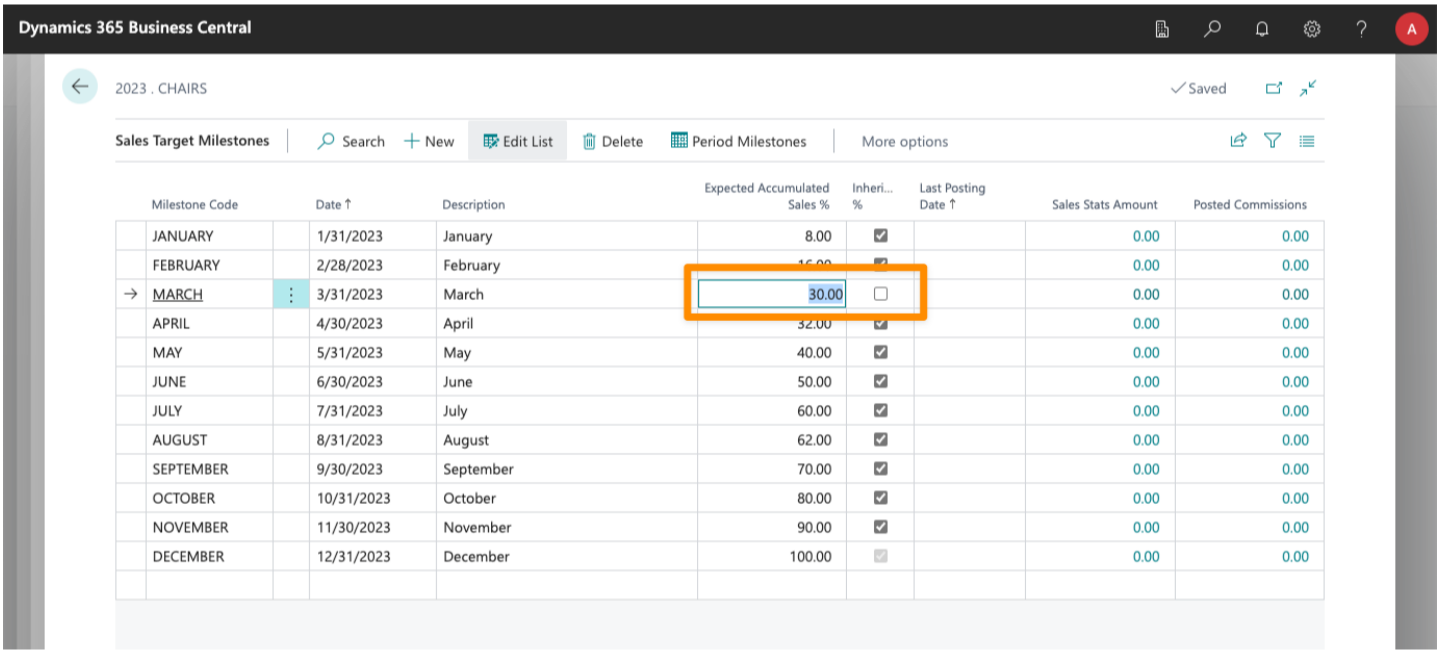
## Defining Milestones

Period

You define milestones for a period and they will automatically be inherited by all sales targets.

### Sales Target

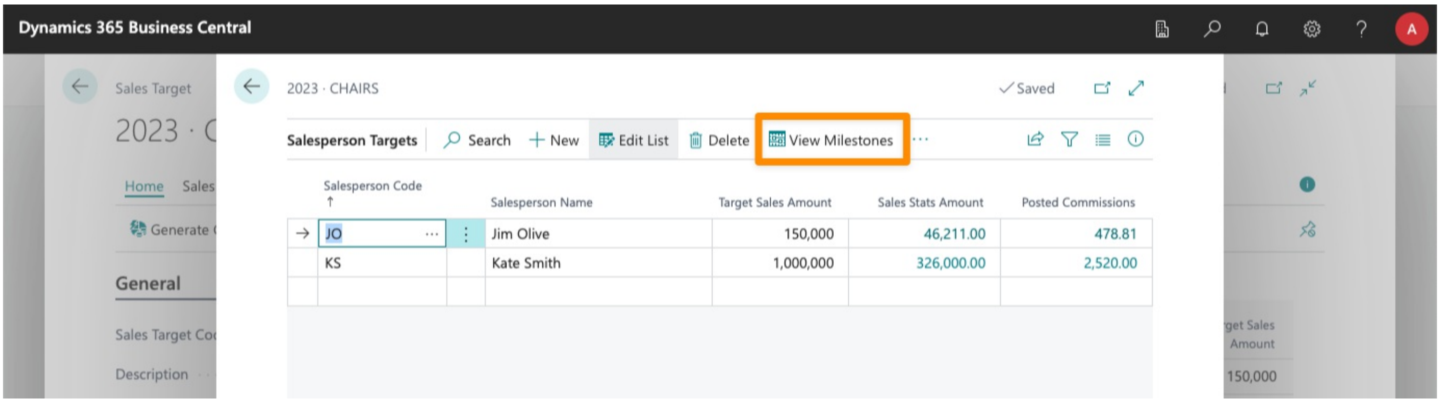
Even though you cannot modify the code, description or date of an inherited milestone, you can uncheck the *Inherited %* column to specify a custom *Expected Accumulated Sales %* for each sales target.



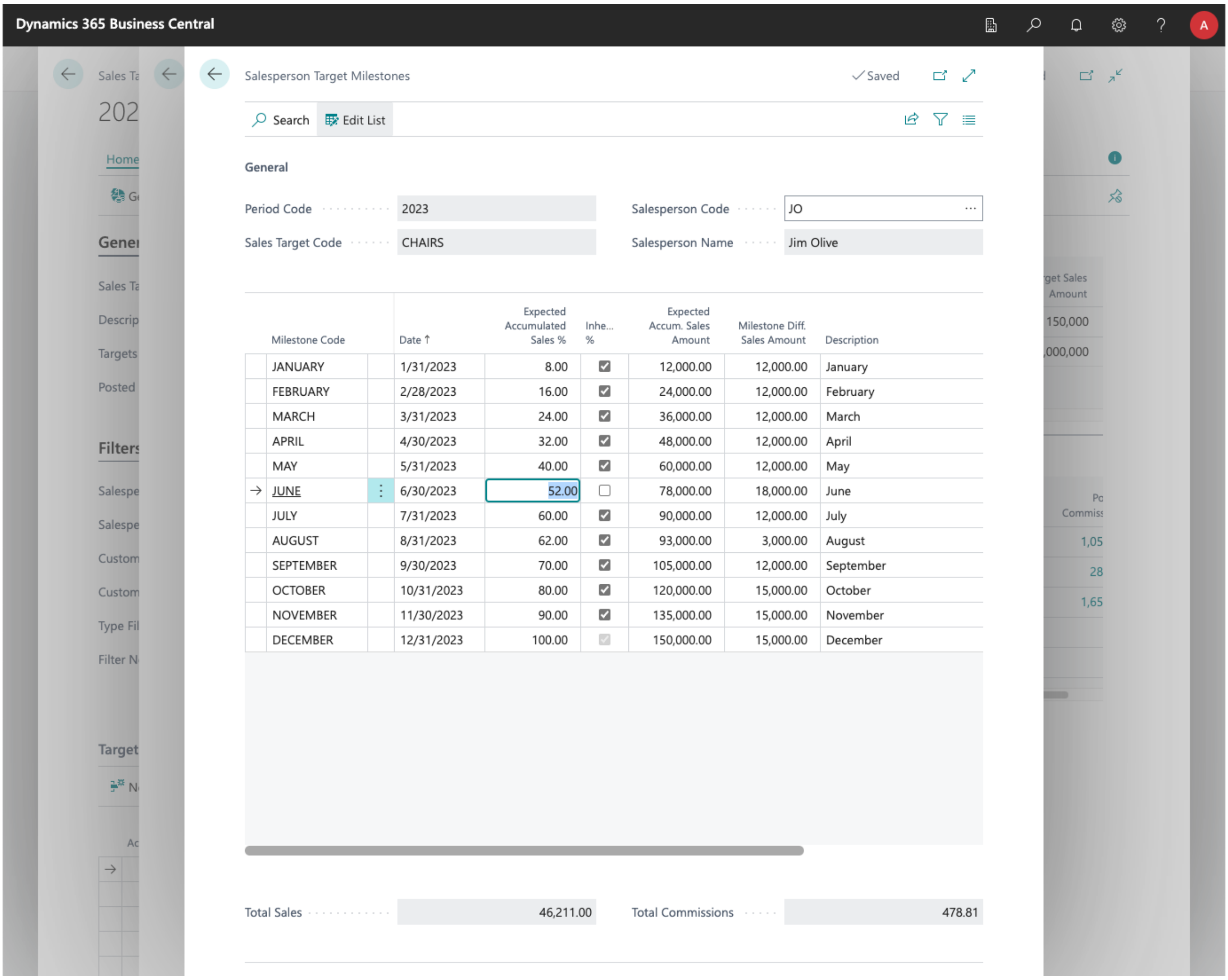
### Salesperson

If a period/sales target has milestones, and you set target amounts by salesperson, you will be able to check the expected amount for each milestone and edit them if necessary.

For this, use the *View Milestones* action, available in the list of targets for each salesperson, when milestones have been defined:



This will open the following page, which lets you edit the individual amounts (or expected %) by unchecking the *Inherited %* column.


Dynamics 365 Business Central
Salesperson Target Milestones
Saved
Search
Edit List
General
Period Code 2023
Sales Target Code CHAIRS
Salesperson Code JO
Salesperson Name Jim Olive
Milestone Code | Date | Expected Accumulated Sales % | Inhe... % | Expected Accum. Sales Amount | Milestone Diff. Sales Amount | Description
JANUARY 1/31/2023 8.00 12,000.00 12,000.00 January
FEBRUARY 2/28/2023 16.00 24,000.00 12,000.00 February
MARCH 3/31/2023 24.00 36,000.00 12,000.00 March
APRIL 4/30/2023 32.00 48,000.00 12,000.00 April
MAY 5/31/2023 40.00 60,000.00 12,000.00 May
JUNE 6/30/2023 52.00 78,000.00 18,000.00 June
JULY 7/31/2023 60.00 90,000.00 12,000.00 July
AUGUST 8/31/2023 62.00 93,000.00 3,000.00 August
SEPTEMBER 9/30/2023 70.00 105,000.00 12,000.00 September
OCTOBER 10/31/2023 80.00 120,000.00 15,000.00 October
NOVEMBER 11/30/2023 90.00 135,000.00 15,000.00 November
DECEMBER 12/31/2023 100.00 150,000.00 15,000.00 December
Total Sales 46,211.00
Total Commissions 478.81

# Scale Commission Based on Margin

## Description

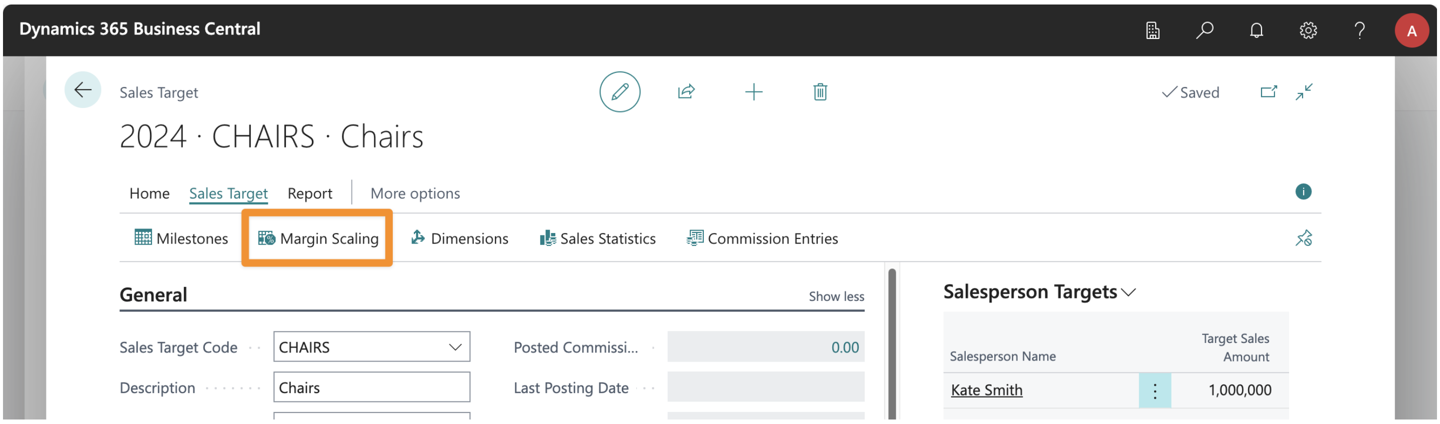
By default, you can set commission tiers based on the sales achieved so that you can define commissions such as:

- More than $100,000 chairs sold -> 1% commission.
- More than $500,000 chairs sold -> 2% commission.
- More than $800,000 chairs sold -> 3% commission.

Margin scaling lets you scale the previous commission based on the actual margin achieved by the salesperson so that you can add an extra layer of complexity to the calculation:

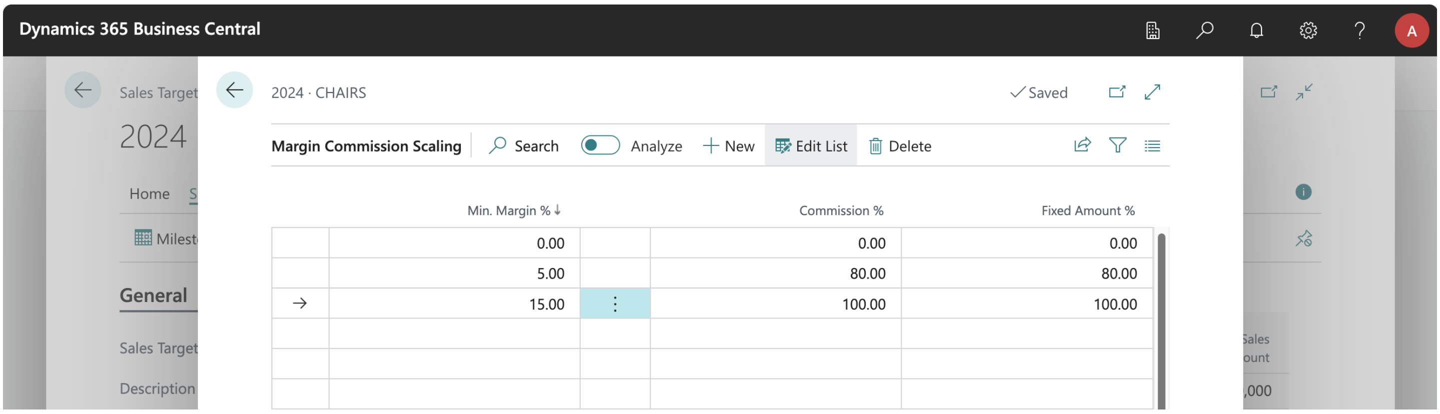
- If the margin is lower than 5% -> the salesperson does not get any commissions.
- If the margin is lower than 15% -> the salesperson only gets 80% of their commission.
- Higher than 15% -> the salesperson gets their full commission amount.

If you want to apply this kind of scaling to your sales targets, you will find an action called *Margin Scaling* in the *Sales Target* menu of the action bar.




## Defining Margin Tiers

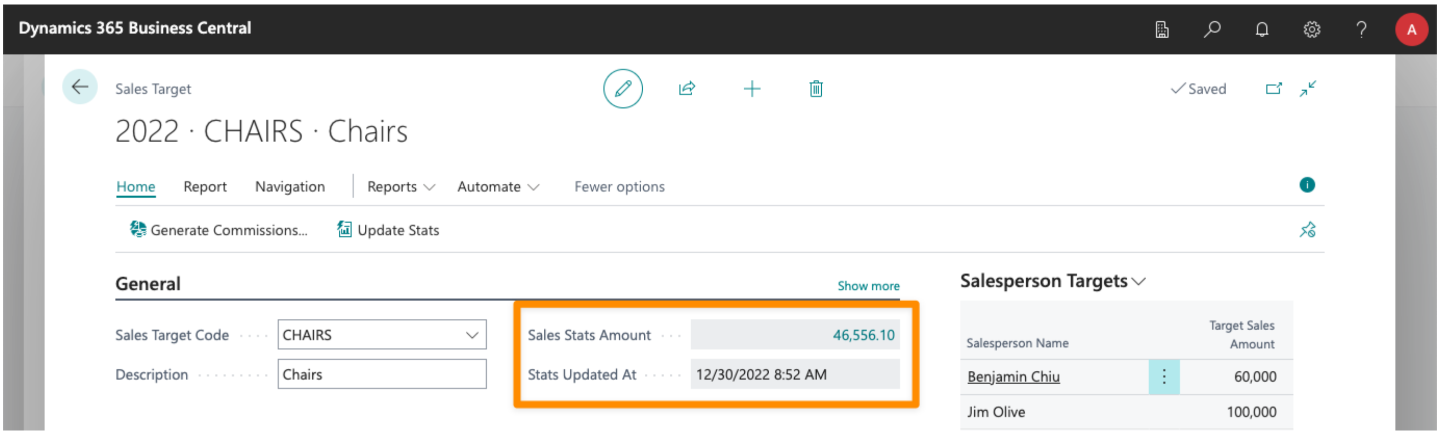
From this page, you can set the different percentages that will be given, based on the final margin achieved. You can see an example in this screenshot, based on the values mentioned in the previous section:



# Sales Target Statistics

## Description

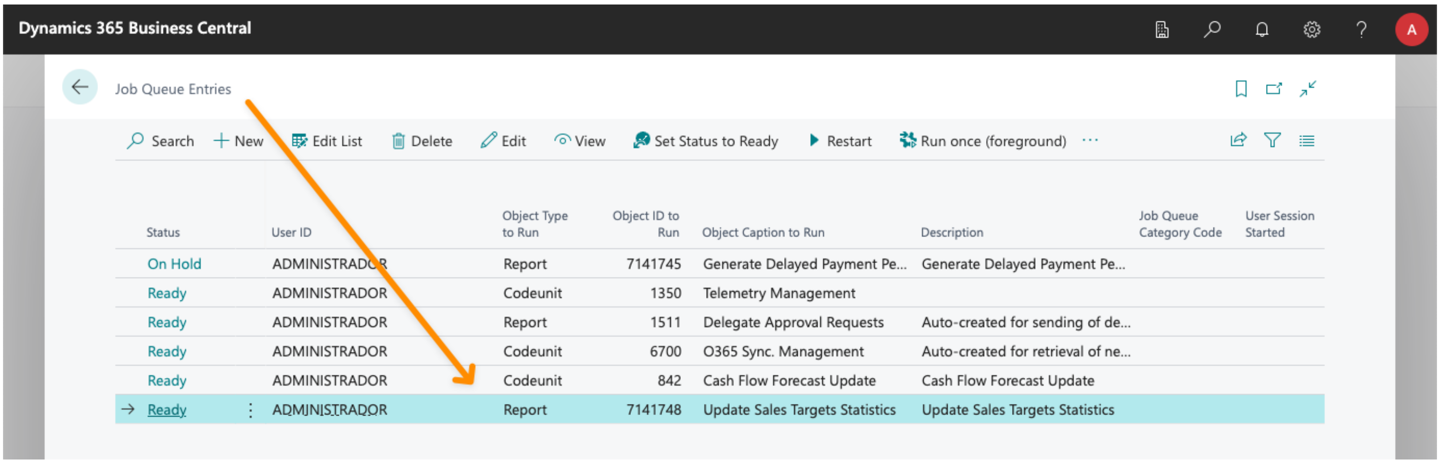
Once a sales target has been configured, sales stats will start being generated for it. You can see them in the sales target, as well as in its salesperson targets if any have been defined, and they will be used to generate the multiple reports available.




Generating these stats is a complex task, though, and currently, the app will automatically update them using a Business Central job that is executed, by default, twice a day. This task can be updated to run more frequently if needed, and they can also be manually updated by using the *Update Stats* action (this can take a while if there have been a lot of sales in the period).

## Scheduled Stats Generation

When iDynamics Commissions is installed, a job is automatically configured to update sales stats for all open periods every 12 hours. You can adjust its schedule depending on how up-to-date you want this information, as well as the number of invoices posted in the period.




**IMPORTANT**

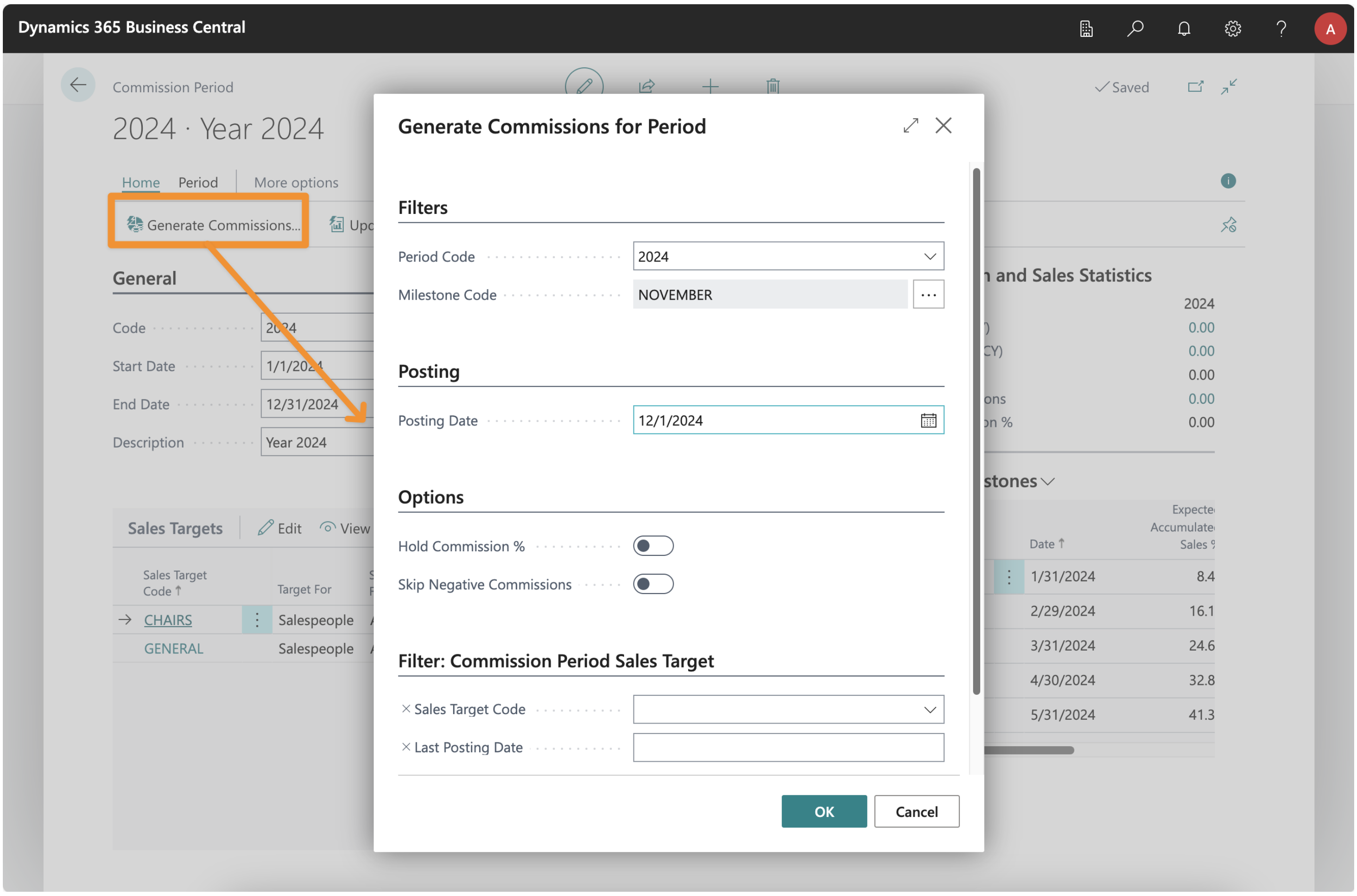
Remember to close periods when not in use. This will stop the sales targets in the period from updating their stats, and will improve the general performance of the app (as well as reduce the time needed by the scheduled job).

# Post Sales Target Commissions

## Description

Once a commission period has ended, we can run the *Generate Commissions...* action, available on the action bar of each sales target or in the period card. This process will add up, for each salesperson, all sales that meet the criteria of each sales target and generate commissions for everyone that has been achieved. The only data required to run the report is the Period Code for which we want to generate commissions and a posting date. This date will be assigned to all generated commission entries and will be used by the commission settlement process, as well as by other reports.

Additionally, a cutoff date or a milestone code (depending on whether the target has milestones or not) can be specified, so that commissions are only generated based on sales achieved up until the date/milestone specified.




The Sales/Commissions by Salesperson report can be run at any moment to check the achievement status of each sales target, as well as to check the commissions that will be generated when the *Generate Commissions* action is run.

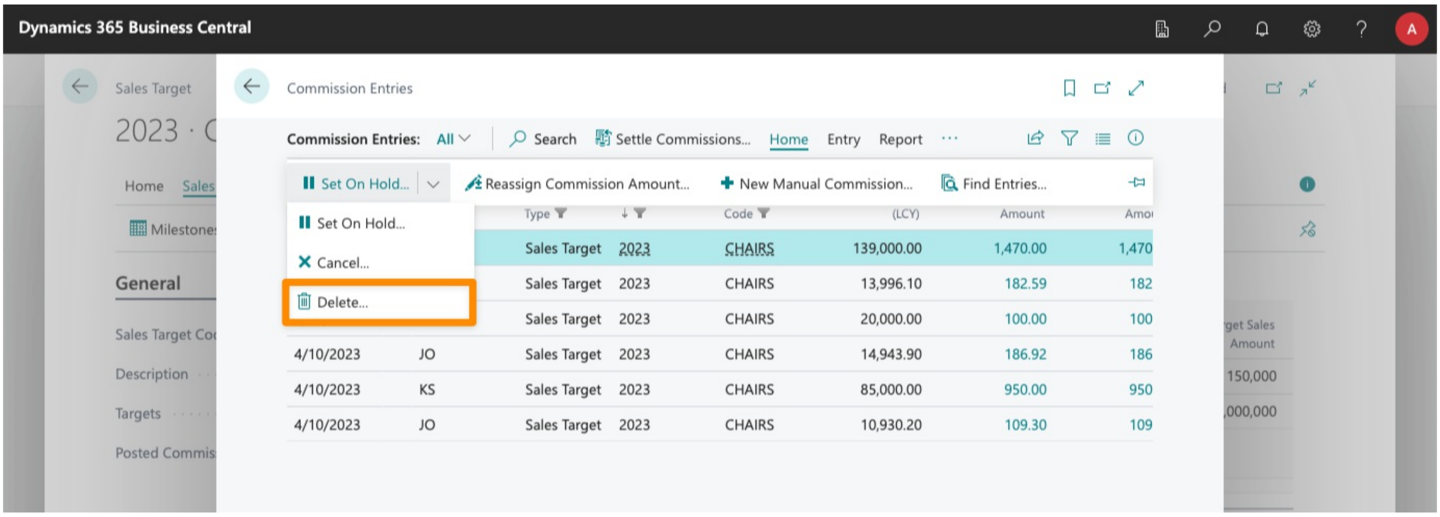
Notes:

- You can run the *Generate Commissions...* action as many times as needed. Each time it will only generate commissions for the difference between the calculated commissions and whichever commissions have already been generated (including negative commissions, if needed).
- The *Generate Commissions...* action will always update the sales target stats before generating the commissions.

## Cancel/Delete Posted Commissions

In order to keep track of all commissions generated within the app, we always recommend you cancel commissions if there has been a mistake (e.g. you selected the wrong date, or filters were incorrect).

However, in this case, if you navigate to the commission entries by clicking on the *Commission Entries* action of a sales target, you will find that a *Delete* option is available in the *Home* > *Set On Hold* dropdown list.




If you generate commissions for a date by mistake, and you want to generate them for a previous date, deleting the generated commission entries will let you fix the mistake.

## Hold a Commission %

In the *Generate Commissions* dialog, in the *Options* section, you will find an option called *Hold Commission %*.

If checked, you will get the option to define which % to hold, and the reason why you are holding that amount.

If you pay commissions monthly, for example, you can use this option to pay only 80% (20% on hold) of the commissions achieved, rather than the full amount. That way, if a salesperson falls below their target amount one month, they won't get a negative commission.

## Don't Generate Negative Commissions

If you pay commissions monthly/using milestones, commissions will be self-adjusting each month, based on the expected sales by the end of the year.

This has the advantage that commissions are more realistic, but it can mean that if a salesperson underachieves one month, they might suddenly get negative commissions (because the previous month they received a % higher than what they are now expected to achieve by the end of the period).

The *Skip Negative Commissions* option, available when you generate commissions for a target, lets you skip the generation of these commissions. If the app calculates a negative commission for the salesperson, they will get a zero instead, and the negative amount will be carried to the next milestone. That way, they will just stop getting commissions until the moment that they get back into a positive amount.

# Sales Target Codes

## Description

The Sales Target Codes list, accessible from the *Manual Setup* area of Business Central, lets us set common target codes that can be reused through different periods.

Once the same sales target code has been used in several commission periods, you can get a report on how sales and commissions have changed through them.

When you set a target for a period, you can choose an existing sales target code, or create a new one (a confirmation dialog will be shown). Whether this confirmation is shown or not can be set in the main configuration of the app, within the *Period/Sales Target Commissions* section.

## Sales Target Statistics

After a target has been defined for a period, sales stats will be generated for it, with info on how much sales each salesperson achieved, regardless of which targets were attained.

You can access these statistics from any commission period or period sales target, from the Related menu in the action bar.

# Sales Target Examples

## Description

In this document, you will find several examples of targets that can be defined using iDynamics Commissions.

> **NOTE**
>
> For these examples, global sales targets have been set, so that it's easier to read the sales target amount, but they would work the same by setting a different sales target for each salesperson and specifying an *Achieved %* instead of a *Min. Amount*.

## Examples

### Global Commission With No Requirements

This is the simplest case that can be set up. No quantity or amount requirements are set. In this example, all salespeople included in the sales target will receive a 2% commission when the period ends, as long as they have posted at least one sales order.

| MIN. AMOUNT | MIN MARGIN % | MIN. QTY | FIXED COMMISS. AMOUNT | COMMISS. % |
|---|---|---|---|---|
| 0 | 0 | 0 | 0 | 2 |

### Minimum Sales Requirements

This is similar to the previous example, but requiring a minimum amount of sales. In this case, only salespeople that have sold more than 10,000 (in local currency), with a sales margin of 10% or higher, and 20 units (in the base unit of measure), will get a 2% commission.

| MIN. AMOUNT | MIN MARGIN % | MIN. QTY | FIXED COMMISS. AMOUNT | COMMISS. % |
|---|---|---|---|---|
| 10,000 | 10 | 20 | 0 | 2 |

### Highest Commission

Let's start with the following target ranges:

| MIN. AMOUNT | MIN MARGIN % | MIN. QTY | FIXED COMMISS. AMOUNT | COMMISS. % |
|---|---|---|---|---|
| 0 | 0 | 0 | 0 | 2 |
| 10,000 | 0 | 0 | 100 | 3 |
| 40,000 | 0 | 0 | 200 | 4 |
| 100,000 | 0 | 0 | 500 | 5 |

If a salesperson has achieved sales of 50,000 (local currency), and *Highest* has been configured for the commission calculation of both fixed and percentage commission amounts, the salesperson will get 200 (local currency) and a 4% commission, as the first three targets have been achieved.

### Cumulative/Tiered Commission

If the same target ranges as in the previous example have been defined:

| MIN. AMOUNT | MIN MARGIN % | MIN. QTY | FIXED COMMISS. AMOUNT | COMMISS. % |
|---|---|---|---|---|
| 0 | 0 | 0 | 0 | 2 |
| 10,000 | 0 | 0 | 100 | 3 |
| 40,000 | 0 | 0 | 200 | 4 |
| 100,000 | 0 | 0 | 500 | 5 |

And the salesperson has achieved sales of $50,000 (dollar being the local currency), but *Cumulative* has been configured for the fixed commissions, the salesperson will receive $300 (100+200) as the fixed commission amount.

For the percentage, if *Tiered* has been selected, the salesperson will get 2% on the first $10,000, a 3% commission on the next $30,000, and 4% on the remaining $10,000. Basically, every time a minimum amount is achieved, the % changes accordingly.

Note: if no percentage has been set for a $0 minimum amount (that is, the salesperson doesn't get any commission if sales are below $10,000), the first commission percentage specified (3%) would also apply to the first $10,000.

### Same Amount, Different Quantity

What happens if we configure two targets with the same amount but different quantities?

| MIN. AMOUNT | MIN MARGIN % | MIN. QTY | FIXED COMMISS. AMOUNT | COMMISS. % |
|---|---|---|---|---|
| 10,000 | 0 | 0 | 0 | 3 |
| 10,000 | 0 | 40 | 0 | 4 |
| 10,000 | 20 | 00 | 0 | 5 |

If the salesperson has sold more than $10,000 (dollars being the local currency), the first line would apply if fewer than 40 units have been sold, the second line would apply if 40 or more units have been sold, and the third will apply if the sales margin has been 20% or higher.

Note that the app will always apply the highest commission % that has been achieved. This means that if, in this example, the salesperson has both sold more than 40 units and achieved a margin of 20% or higher, a 5% will apply, as that is the highest commission % of all the achieved targets.

# Sales Documents

## Description

Once direct commission rates have been set up, commissions will be automatically generated every time a sales document is posted, with no further user interaction required.

Sometimes, however, it can be useful to set particular commissions to a single sales line or alter the way commissions are generated for a particular document. Here you will find the different options available before a sales document is posted.

## Assign Multiple Salespeople

Many times, a sale is the result of the work of several salespeople. iDynamics Commissions lets you specify every salesperson that took part in the sale, and how that will be reflected when generating commissions and sales statistics.

Learn how to assign multiple salespeople to a sales document

## Lock Salespeople Assigned to a Document

Lock the salespeople assigned to a document, so that users with limited permissions can't change the assigned salesperson, and so that changes to the sales document don't update the list of assigned salespeople by mistake.

Learn how to lock the salespeople assigned to a document

## Exclude Lines from Commissions and/or Statistics

Sometimes you might want to exclude certain sales lines from the commission generation process, or even from sales amounts when getting reports (e.g. you probably don't want to see shipping costs as part of the amounts achieved by a salesperson).

Learn how to exclude sales lines from the commissions logic

## Update Active Sales Documents

Maybe you just changed the commission groups assigned to each item, maybe the salesperson assigned to a customer changed. Commission values (e.g. commission groups) are calculated when a document is created and/or lines added to it, but can be easily updated if needed.

Learn how to update the values assigned to a sales document

## View and Generate Commissions for Posted Documents

Direct commissions can be generated for posted documents. This can be useful once you have finished setting up commission rates, to generate commissions for the current period, to recreate commissions if the rates were not correctly defined, or even in order to quickly tests all the different reports and features without the need to generate new sales documents.

Learn how to generate commissions for posted documents

## Credit Memos

When an invoice is cancelled, commissions will also be cancelled, reverting the original amounts. When a partial credit memo is created, though, commissions will apply to it as if it was a regular invoice.

Learn how commissions will be generated or cancelled when credit memos are created

## Set a Specific Base % for Commissions

In certain scenarios, you might want to define that the salesperson (or an additional salesperson) should only get commissions on a % of the invoice amount.

Learn how to set a specific base % for commissions

## Manual Commission % or Amount

If needed, the app lets you set a specific commission % for a whole document or some of its lines. Furthermore, you can also set a specific commission amount for each line, which can be helpful if you want to import invoices/commissions from an external system.

Learn how to assign a specific commission % or amount to an invoice

## Discounts

Any discounts applied to a document will affect how commissions are applied, as well as the sales statistics generated.

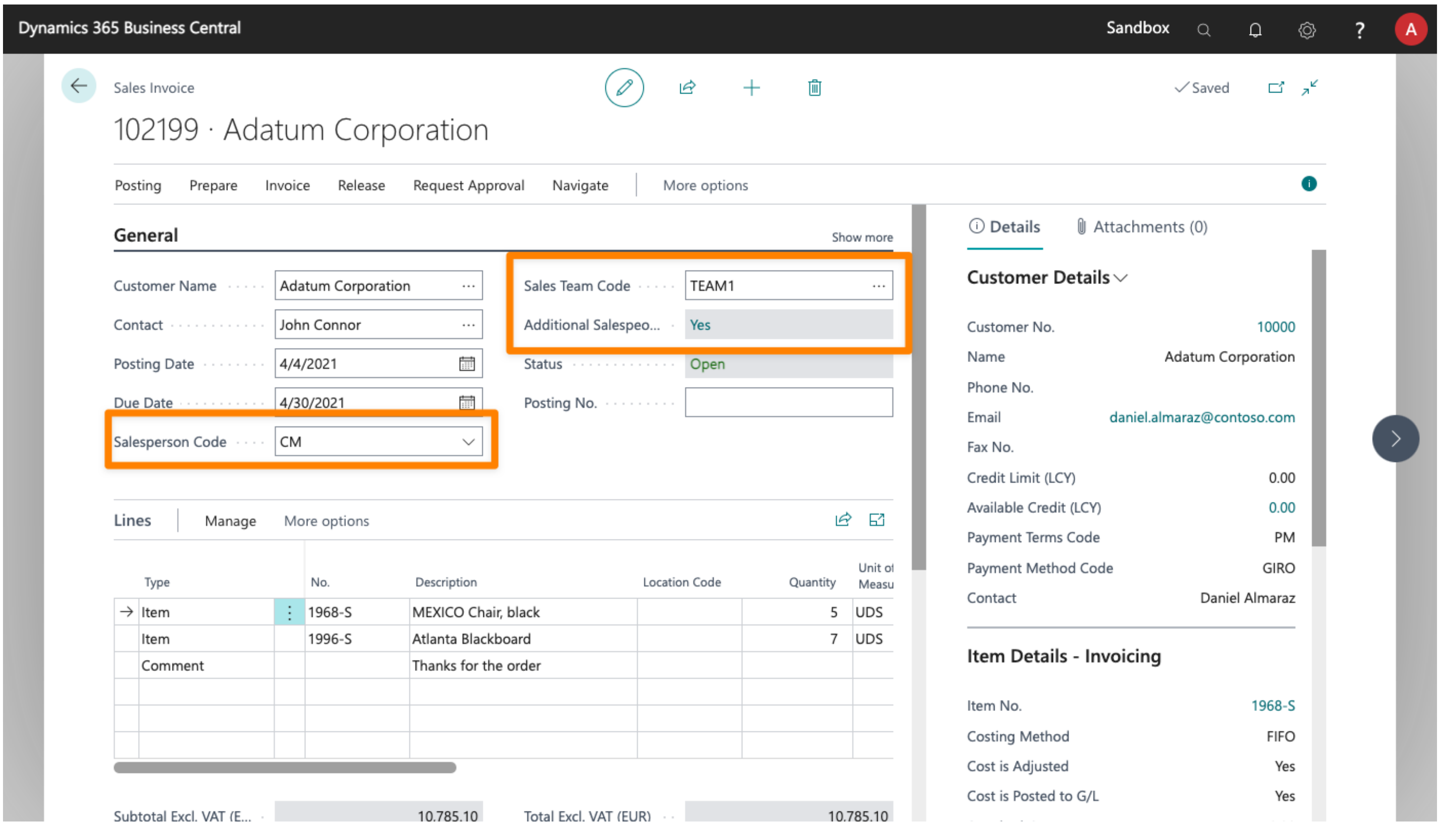
Learn how sales discounts alter the way commissions and stats are generated

# Multiple Salespeople

## Description

By default, iDynamics Commissions will generate, for each sales document, commissions for the main salesperson assigned to the document. However, sometimes, there might be more than one salesperson involved in the sale, or you might want to split part of those commissions with another salesperson that has participated in it, either at the document or line level.

**iDynamics Commissions has been designed to let you configure all salespeople that took part in each sale, assigning commissions to each one, and even defining how the sales amounts should be split among them.**




In this video, we explain how to assign additional salespeople in the same sales document.

## Sales Team

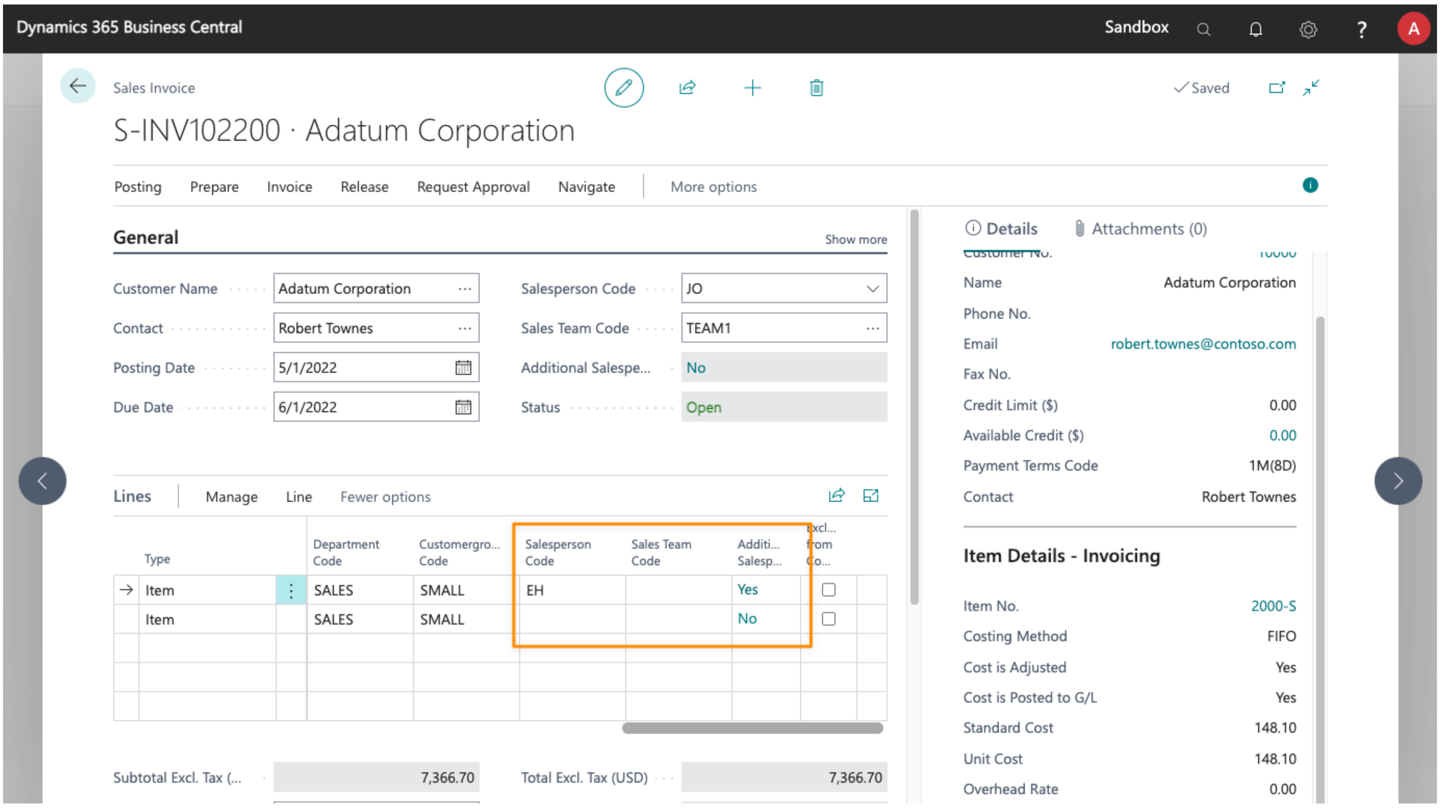
When a salesperson is manually or automatically assigned to a sales document, their default sales team will also be assigned to it. By defining a manager or sales roles within the team, you can configure team commission rates that will be given to members of the team automatically.

Just as with the salesperson, different teams can be assigned to each sales line, if needed.

## Sales Line Salesperson

The *main* salesperson (the one assigned to the document) will receive commissions from every sales line, but individual lines can be assigned to a different salesperson. That way if, for example, chairs were sold by salesperson A, and tables by salesperson B, each of them would get commissions on their corresponding lines.

If no salesperson is specified for a line, the one assigned to the sales header will apply.

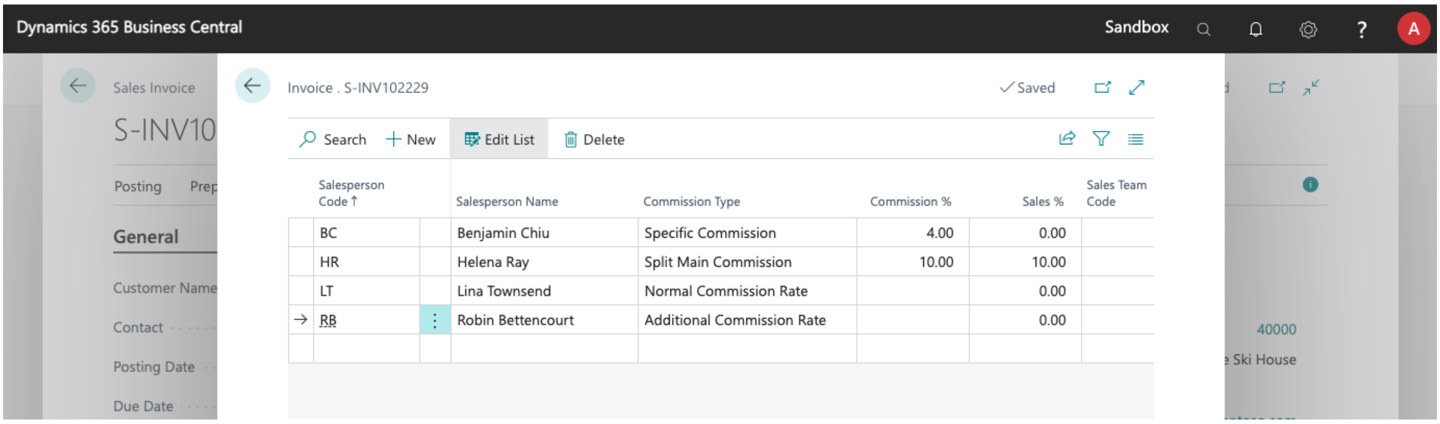



# Additional Salespeople

Additional salespeople might have taken part in the sale, and you can specify how that will affect the generated commissions and sales statistics (which will in turn affect sales targets).

In all sales documents (quotes, invoices, orders, etc.) you will find, under the code of the assigned salesperson, the *Additional Salespeople* field. This boolean field shows whether additional salespeople are going to get part of the commissions generated for this document or not.

By clicking on this field a list will be shown in which additional salespeople can be set for the document, specifying which commissions should be given to them and whether they share part of the sales amounts in the document.




**NOTE**

Each sales line can also have its own additional salespeople, you can find this field next to the Salesperson Code and Sales Team Code fields, in each line.

Additional Commission Types

Additional salespeople can get commissions calculated in different ways:

- *Specific Commission*. This lets you specify which commission % they will get from the sale.
- *Split Main Commission*. This salesperson will take a cut of the commission assigned to the main salesperson. The commission rate that applies to the main salesperson will be calculated, and the % specified here will be taken from them and given to this additional salesperson.
- *Normal Commission Rate*. The additional salesperson will get their commission just as the main salesperson, based on the defined direct commission rates.
- *Additional Commission Rate*. The app lets you specify commissions that will only apply to additional salespeople. That way, you can choose different commission rates depending on whether a salesperson was the main salesperson in the sale, or was aiding another salesperson.

You can set the default value for this field in the main setup page so that the one you use the most is automatically assigned when you add salespeople to a document.

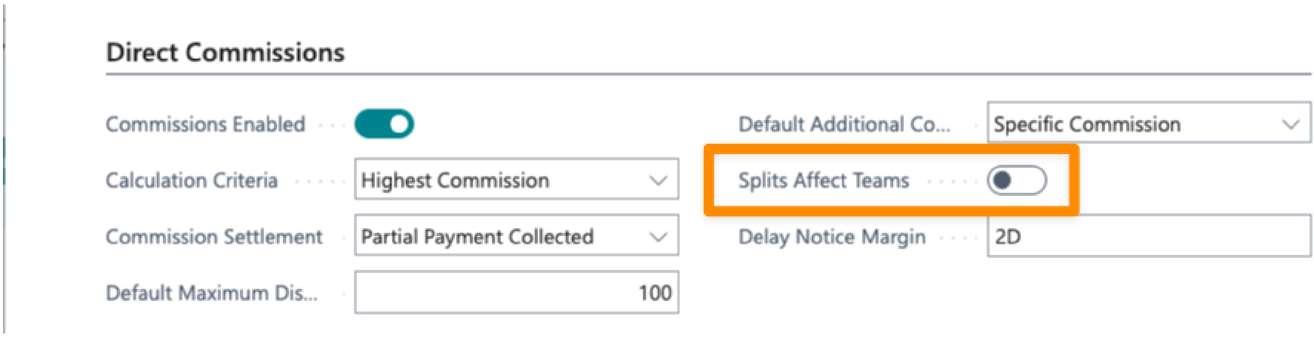
Note: for the specific commission type, a hidden *Commission Base Amount* can be added to the list to decide whether the % applies to the sales amount or margin amount for each line (by default, the app will use the value configured in the general setup).

# Split Team Commissions

If you have defined **sales teams**, you can setup whether splits will affect just the main salesperson, or all members of the team.

E.g. if two salespeople with a different manager split commissions, you can choose whether the manager of the main salesperson will keep their full commission, or if this will also be automatically split between both managers.

This option is available on the main setup page of the app




# Split Sales Amounts

By default, when it comes to sales statistics, the main salesperson will get 100% of the sale, regardless of how many salespeople took part in it. You can, however, specify a Sales % for each additional salesperson, which will be taken from the main salesperson. You can learn more about this in the chapter on sales statistics.

# Automatically Assign Additional Salespeople

While additional salespeople usually represent a specific sale in which these salespeople have collaborated, there are instances where you might want to assign multiple salespeople to a particular customer or ship-to address, or even when a specific salesperson is selected.

For these cases, you can assign additional salespeople to them, so that they are automatically assigned to the sales document.

# Lock Salespeople Assigned to a Document

## Description

Business Central, and iDynamics Commissions, will update the salesperson assigned to a sales document when the customer changes, or when a different ship-to address is selected, for example. The list of additional salespeople will also be updated if the salesperson assigned to the sales header changes.

Sometimes, though, you might want to lock all the salespeople assigned to a particular document, because you don't want them to change even if the document is updated (e.g. after partial shipment). For that, the app adds a *Salespeople Locked* field to the sales document. When set, the app will stop updating these values in cases (e.g. ship-to address changed) where it usually would.

## Limit Who Can Change the Assigned Salespeople

When *Salespeople Locked* is locked, neither the main salesperson nor the additional salespeople assigned to the document or its lines can be changed. As this field can only be edited by users with the *IDPCOS User* or *IDPCOS Admin* permission sets, this means that users without these roles won't be able to change the salesperson assigned to a sales document, nor edit the list of additional salespeople.

## Lock on Posting

When a sales document is posted, *Salespeople Locked* will be automatically set to true. This is done so that any processing done in the sales document while posting will not affect the list of assigned salespeople, and so that, if a document is partially posted, the salespeople assigned to it won't be updated unless explicitly specified (by setting this field to false).

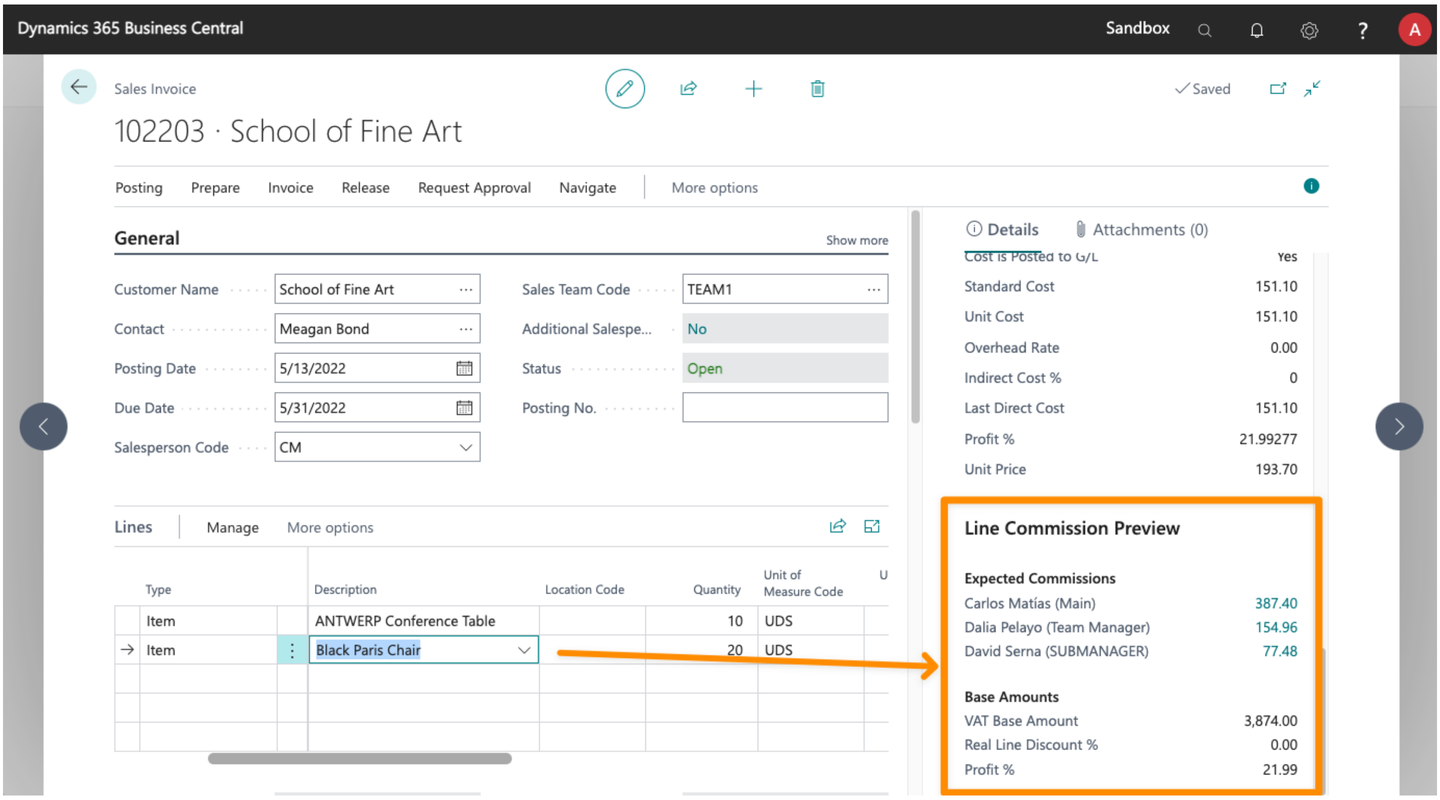
# Preview Commissions

## Description

Before a sales document is posted, there are different ways in which you can preview which commissions are *expected* to be generated for the sales document. We say *expected*, because commissions are generated when the document is posted, and commission rates could change before then, for example.

## Line Preview Factbox

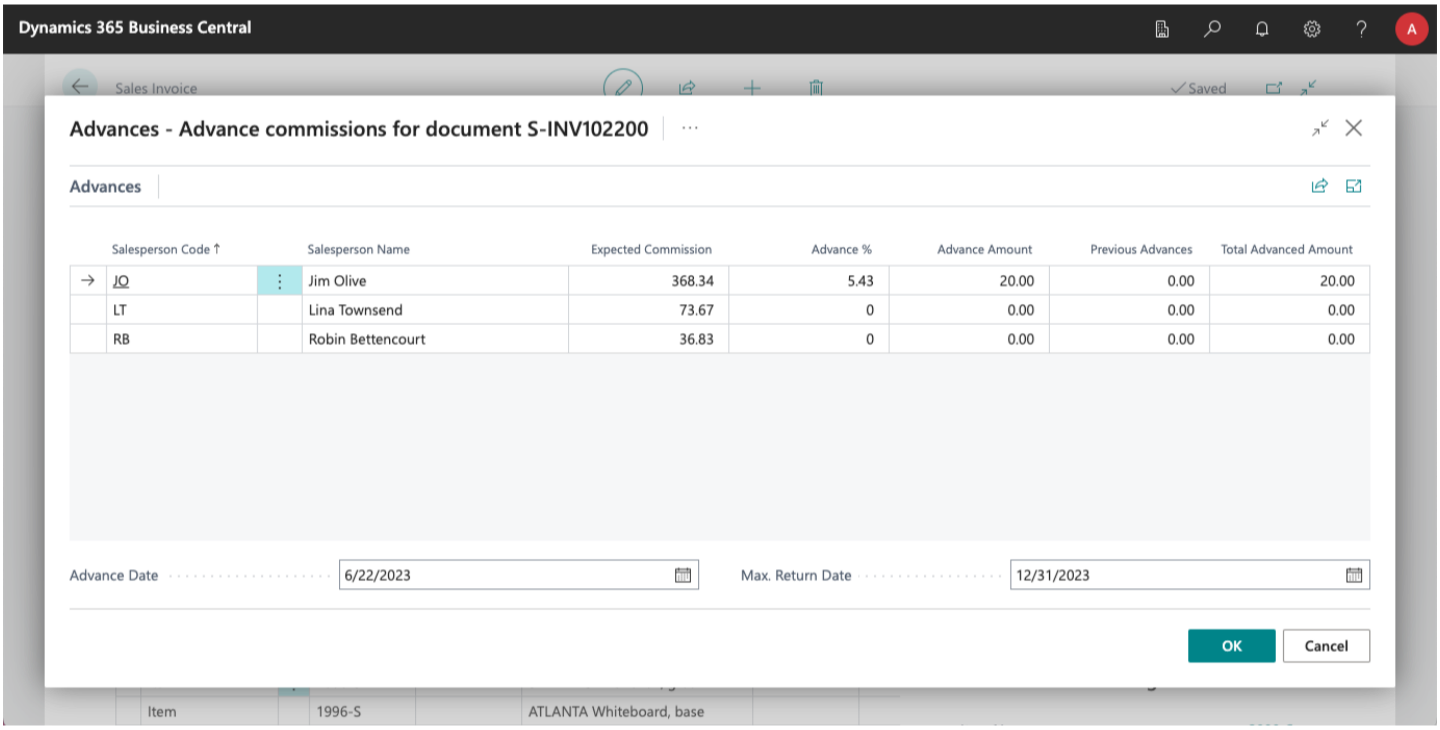
Inside any sales document that has not yet been posted, a factbox shows the expected commissions for the selected line.




Note that, in addition to the expected commissions, the factbox also shows the base amounts (e.g. real discount, profit margin) that were used when calculating which commission rates applied to the sales line.

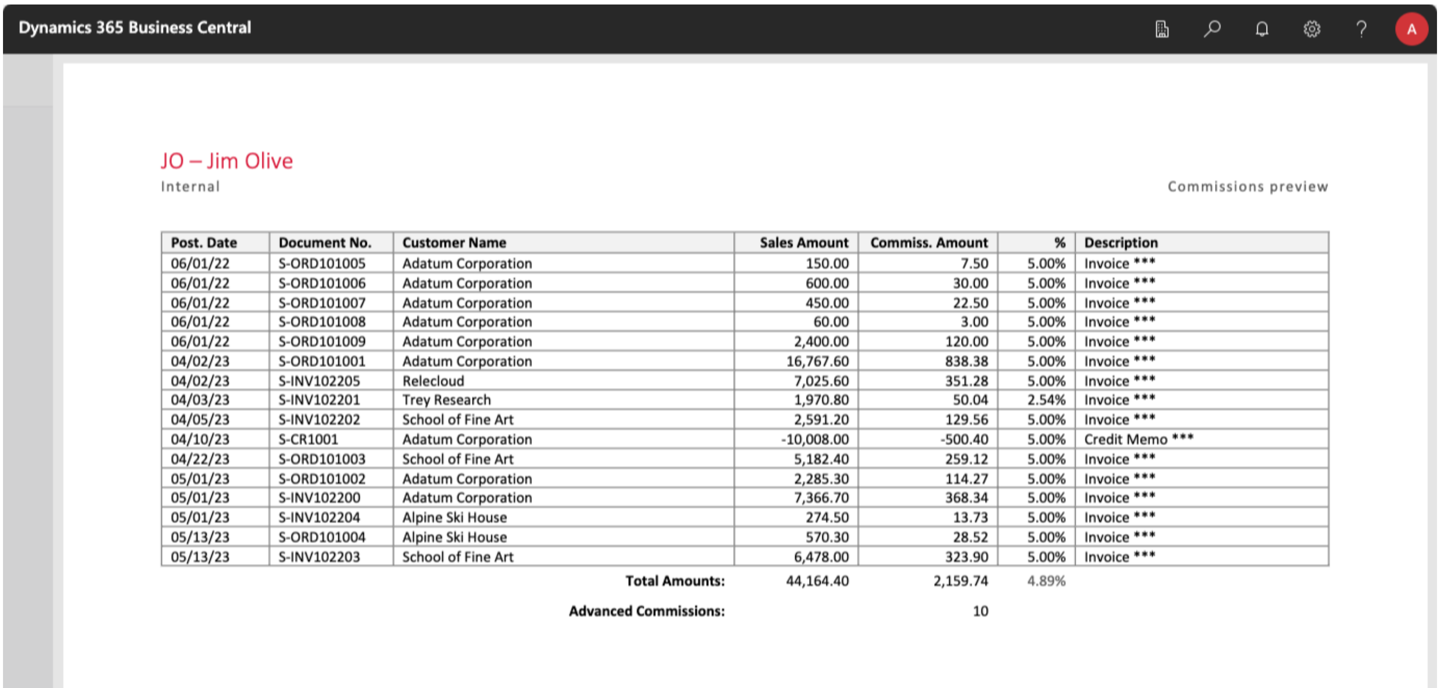
## Preview and Advance Commissions

You can use the *Advance Commissions*, available in sales orders and sales invoices, to preview commissions for the document and give advances




## Reports

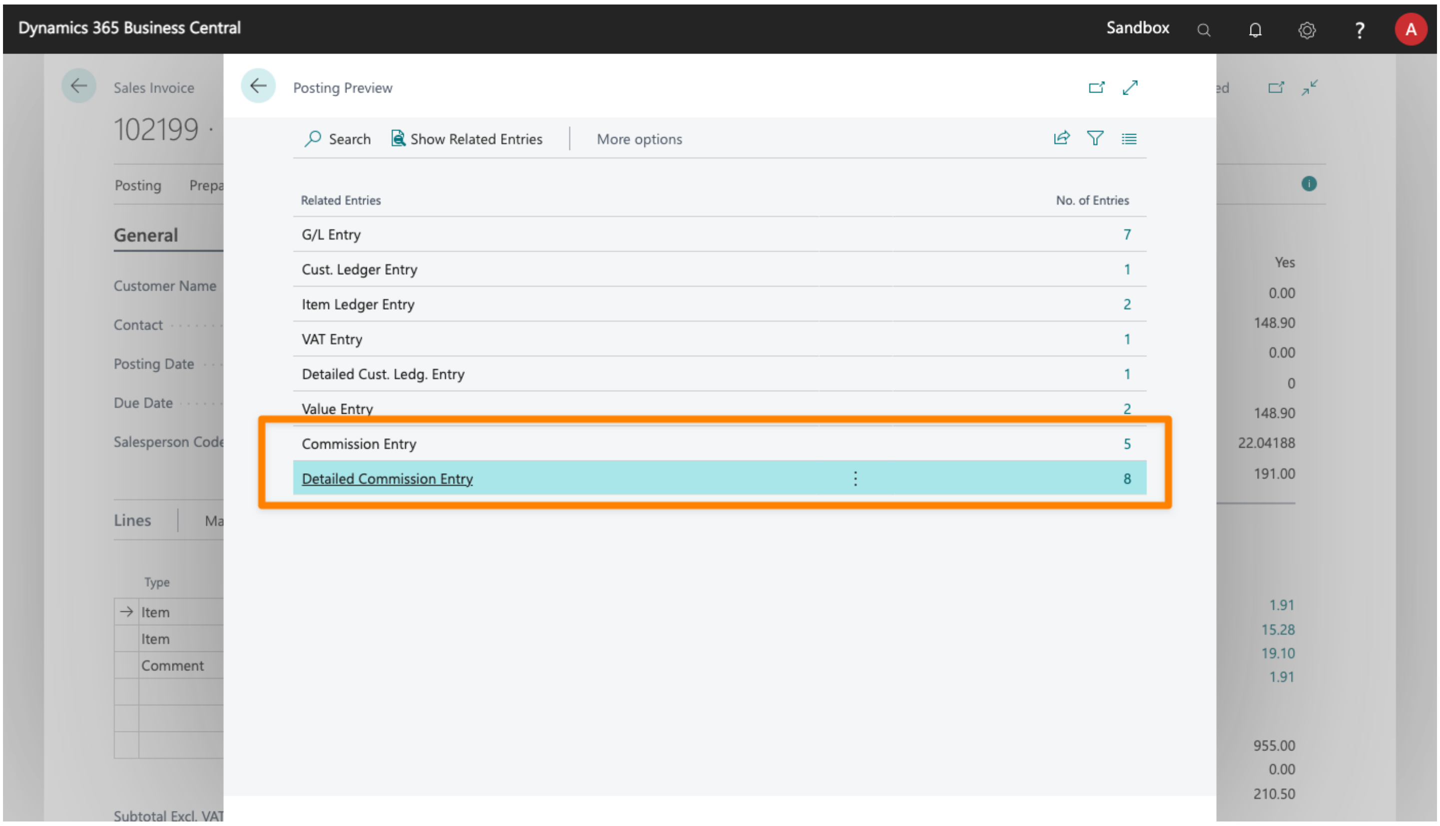
The app includes two reports that you can use to give information to your salespeople about the commissions currently expected for sales documents that have not yet been posted.




| Post. Date | Document No. | Customer Name | Sales Amount | Commiss. Amount | % | Description |
|---|---|---|---|---|---|---|
| 06/01/22 | S-ORD101005 | Adatum Corporation | 150.00 | 7.50 | 5.00% | Invoice *** |
| 06/01/22 | S-ORD101006 | Adatum Corporation | 600.00 | 30.00 | 5.00% | Invoice *** |
| 06/01/22 | S-ORD101007 | Adatum Corporation | 450.00 | 22.50 | 5.00% | Invoice *** |
| 06/01/22 | S-ORD101008 | Adatum Corporation | 60.00 | 3.00 | 5.00% | Invoice *** |
| 06/01/22 | S-ORD101009 | Adatum Corporation | 2,400.00 | 120.00 | 5.00% | Invoice *** |
| 04/02/23 | S-ORD101001 | Adatum Corporation | 16,767.60 | 838.38 | 5.00% | Invoice *** |
| 04/02/23 | S-INV102205 | Relecloud | 7,025.60 | 351.28 | 5.00% | Invoice *** |
| 04/03/23 | S-INV102201 | Trey Research | 1,970.80 | 50.04 | 2.54% | Invoice *** |
| 04/05/23 | S-INV102202 | School of Fine Art | 2,591.20 | 129.56 | 5.00% | Invoice *** |
| 04/10/23 | S-CR1001 | Adatum Corporation | -10,008.00 | -500.40 | 5.00% | Credit Memo *** |
| 04/22/23 | S-ORD101003 | School of Fine Art | 5,182.40 | 259.12 | 5.00% | Invoice *** |
| 05/01/23 | S-ORD101002 | Adatum Corporation | 2,285.30 | 114.27 | 5.00% | Invoice *** |
| 05/01/23 | S-INV102200 | Adatum Corporation | 7,366.70 | 368.34 | 5.00% | Invoice *** |
| 05/01/23 | S-INV102204 | Alpine Ski House | 274.50 | 13.73 | 5.00% | Invoice *** |
| 05/13/23 | S-ORD101004 | Alpine Ski House | 570.30 | 28.52 | 5.00% | Invoice *** |
| 05/13/23 | S-INV102203 | School of Fine Art | 6,478.00 | 323.90 | 5.00% | Invoice *** |
| | | Total Amounts: | 44,164.40 | 2,159.74 | 4.89% | |
| | | Advanced Commissions: | | 10 | | |

## Preview Posting

For all sales documents, running the standard Business Central action will show all of the commissions that will be generated for the document when it is posted.



Dynamics 365 Business Central
Sandbox
Sales Invoice
102199
Posting Preview
Search
Show Related Entries
More options
Related Entries
No. of Entries
G/L Entry 7
Cust. Ledger Entry 1
Item Ledger Entry 2
VAT Entry 1
Detailed Cust. Ledg. Entry 1
Value Entry 2
Commission Entry 5
Detailed Commission Entry 8
General
Customer Name
Contact
Posting Date
Due Date
Salesperson Code
Lines
Type
Item
Item
Comment
Subtotal Excl. VAT

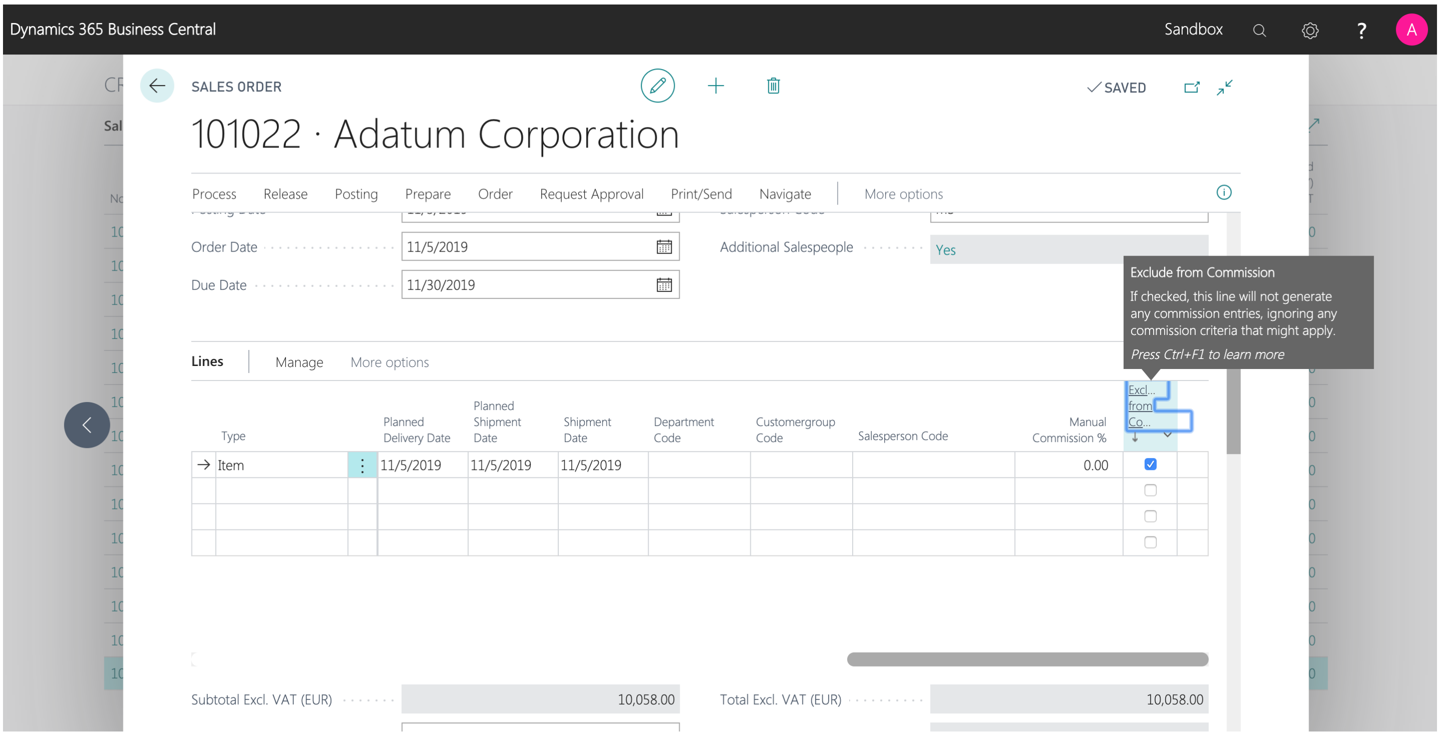
# Exclude Sales Lines

## Description

Lines can be excluded from commissions (no commissions will be generated for them) and/or sales statistics (they will be ignored in sales reports). Both of them can be set at the sales line level by users with permissions to do so.

## Exclude from Commissions

This check lets you specify that a particular sales line should not generate commissions, regardless of any commission rate that might apply. Furthermore, the line will be ignored when sales targets for the salesperson are updated.




## Exclude from Sales Statistics

This option can be selected for a single line, or configured for items, resources, G/L accounts, item charges, and/or fixed assets (so that all lines for them inherit this value). When a line is excluded from sales statistics, its amount will not be added to the sales amounts shown in reports generated by the app. This can be useful, for example, to exclude shipping charges from sales reports.

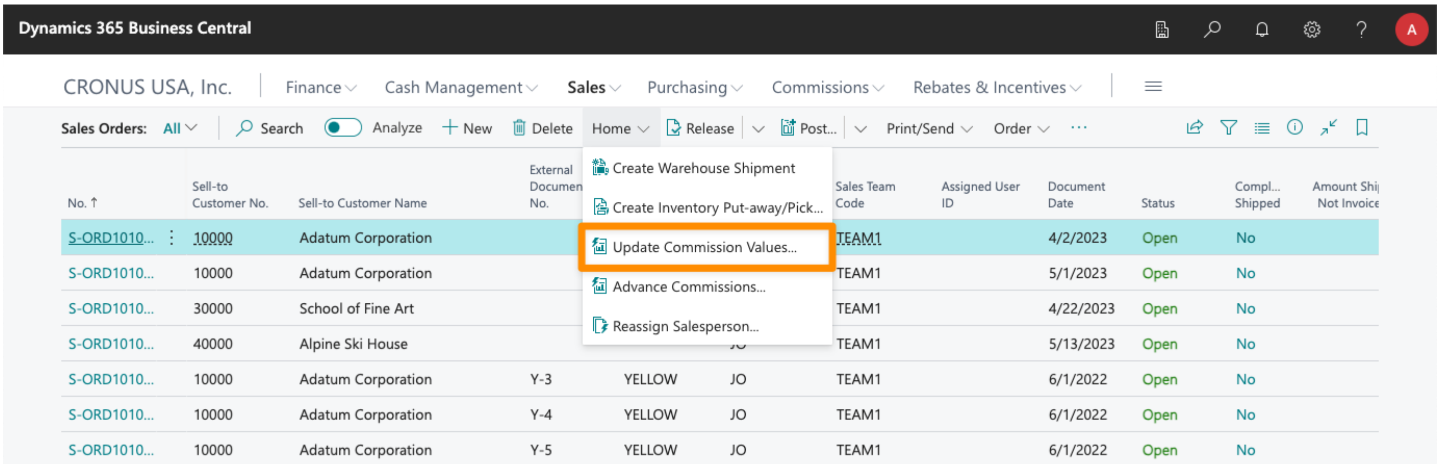
> **NOTE**
>
> If a line is excluded from sales statistics, it will automatically be excluded from commissions as well.

# Update Commission Values

## Description

Customer and salesperson commissions groups are assigned to the sales document when one of these two values (customer/salesperson) is assigned to it. For sales lines, the item commission group is assigned then the item, resource, or GL account code is specified.

When the commission group for one of these elements is updated after a sales document has been created, the document will still be assigned to the original commission group that was assigned in its creation. If you want to update one or several sales documents to use the updated commission groups, use the *Home > Update Commission Values...* action, available in the action bar of all sales document lists.



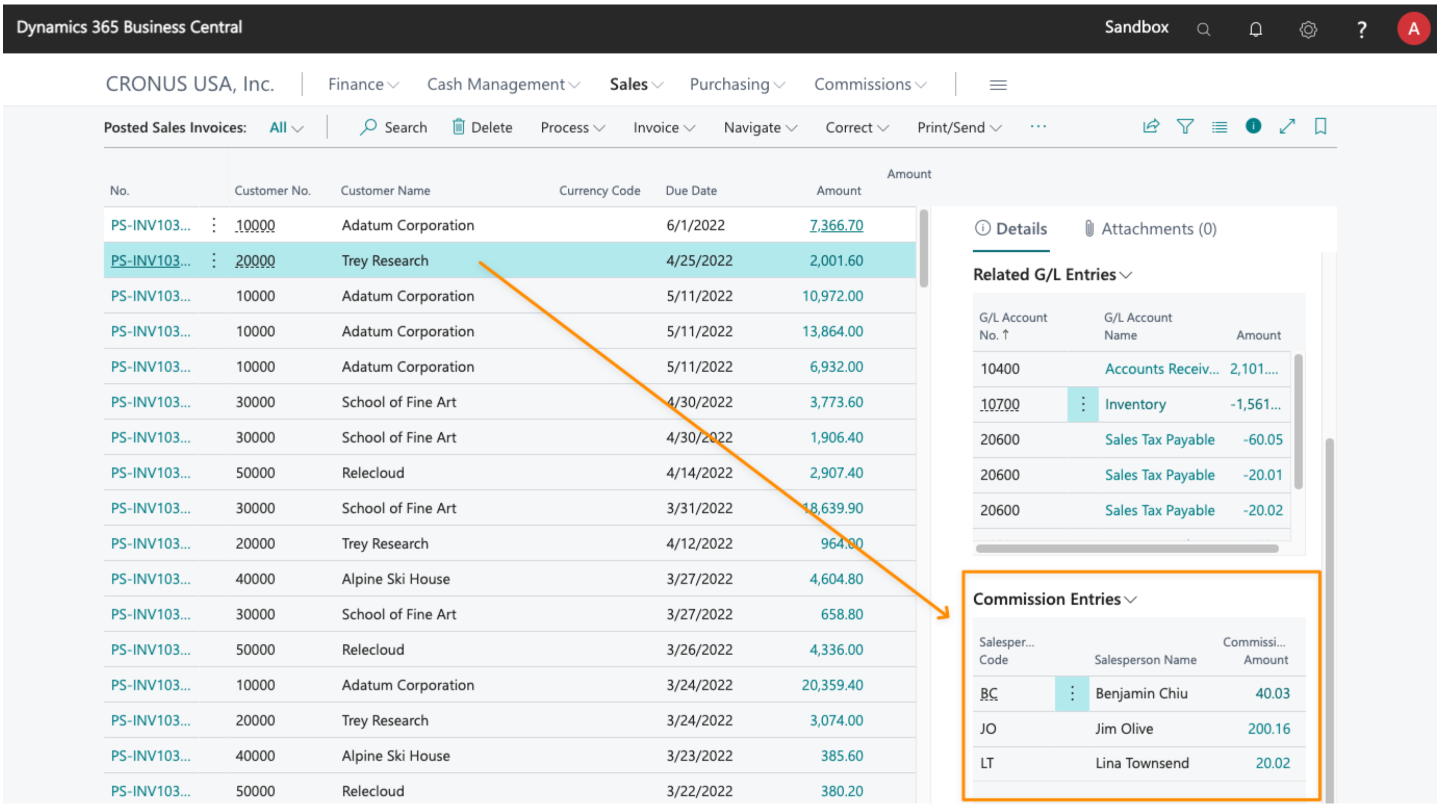

This process lets you update:

- The team assigned to the document or its lines (it will assign the default sales team for each salesperson).
- The customer commission group for the customer.
- The salesperson commission group for every salesperson assigned to the document.
- The item commission group assigned to each sales line.
- Which lines are excluded from sales statistics and commissions

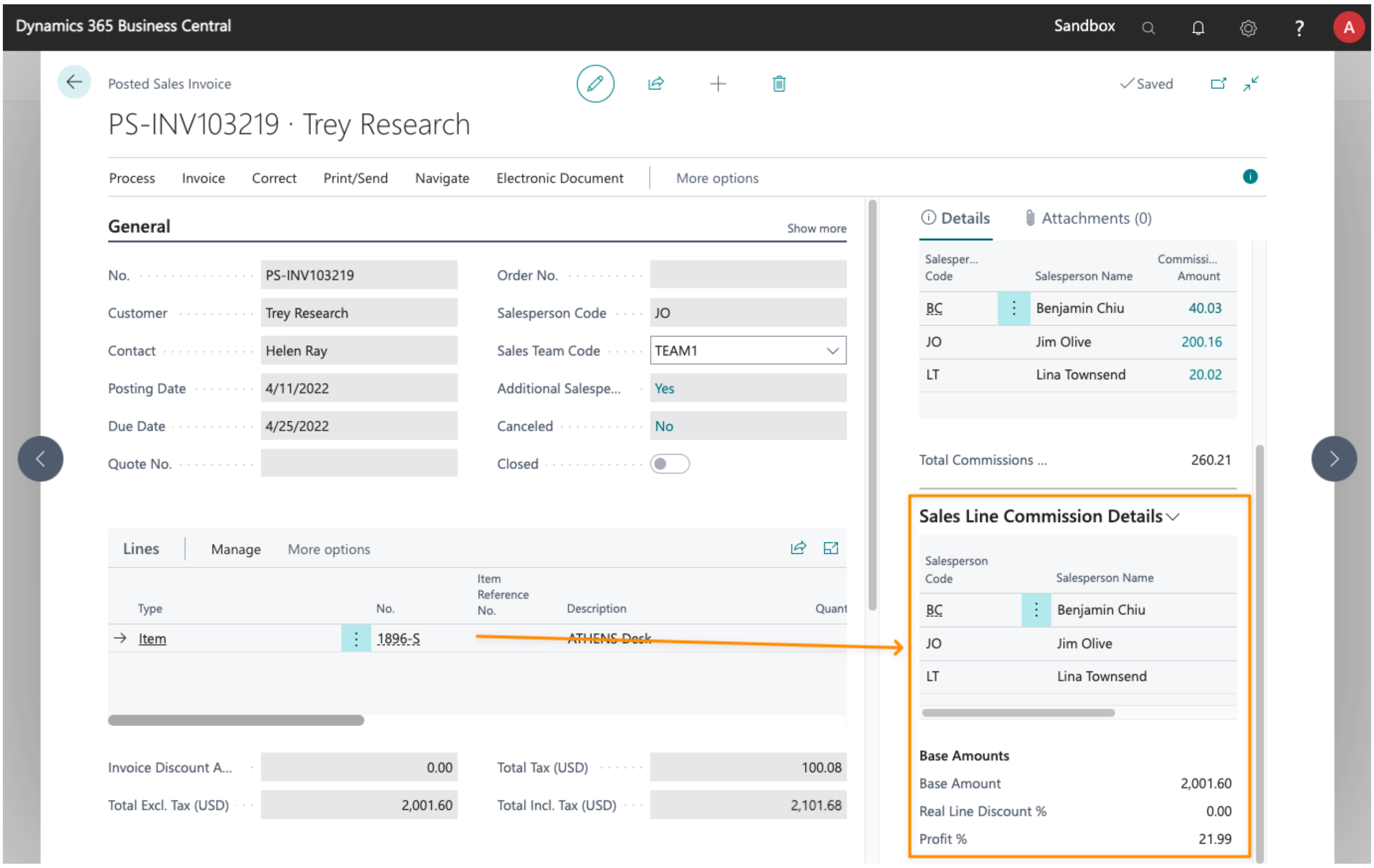
# Posted Sales Documents

## Commissions Factboxes

Once a sales document has been posted, commissions can be quickly checked using the Commissions factbox, available both in the posted invoices and credit memos lists.




Furthermore, when inside a document, you can also check the commissions generated for each line.

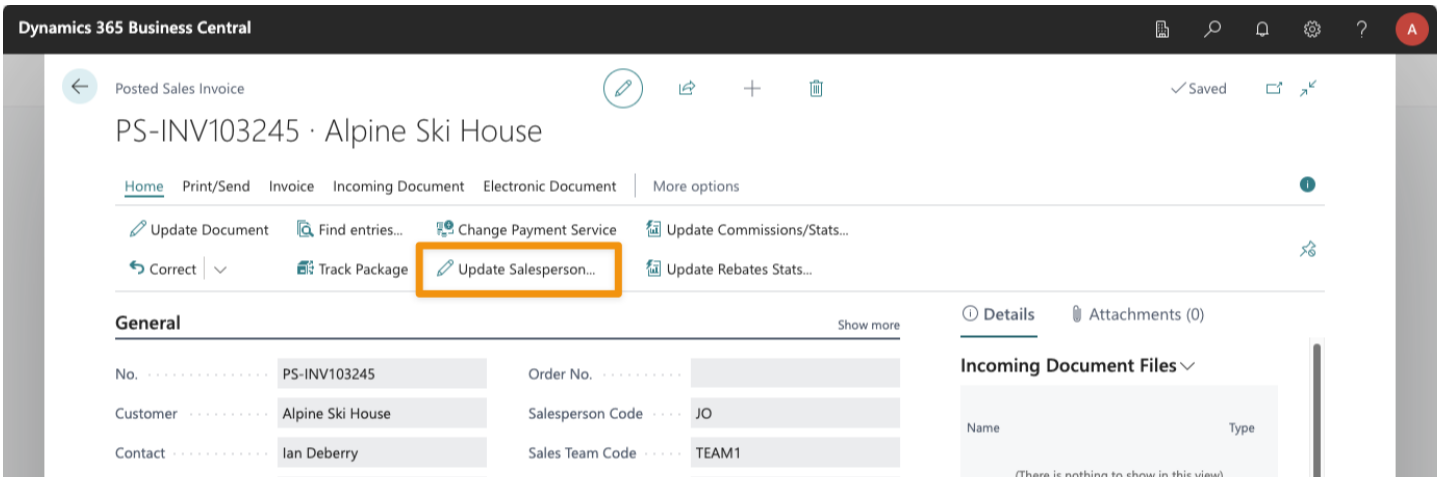



In both cases, the factbox includes actions to navigate to the Commission Entries list and its detailed commission entries.

Finally, the *Find entries* action, lets you navigate to both its Commission Entries and its Detailed Commission Entries.

# Edit Salespeople

You can edit the salesperson assigned to a sales document after it has been posted, by using the *Home* > *Update Salesperson...* action, available in the card of posted sales invoices and credit memos.




The same action can be found in the action bar of the document lines, under the *Line* menu, if you want to edit the salesperson assigned to a specific sales line.

Additionally, if you click on the *Additional Salespeople* field, of the document header or one of its lines, the *Update Additional Salespeople* action will let you edit the list of additional salespeople.

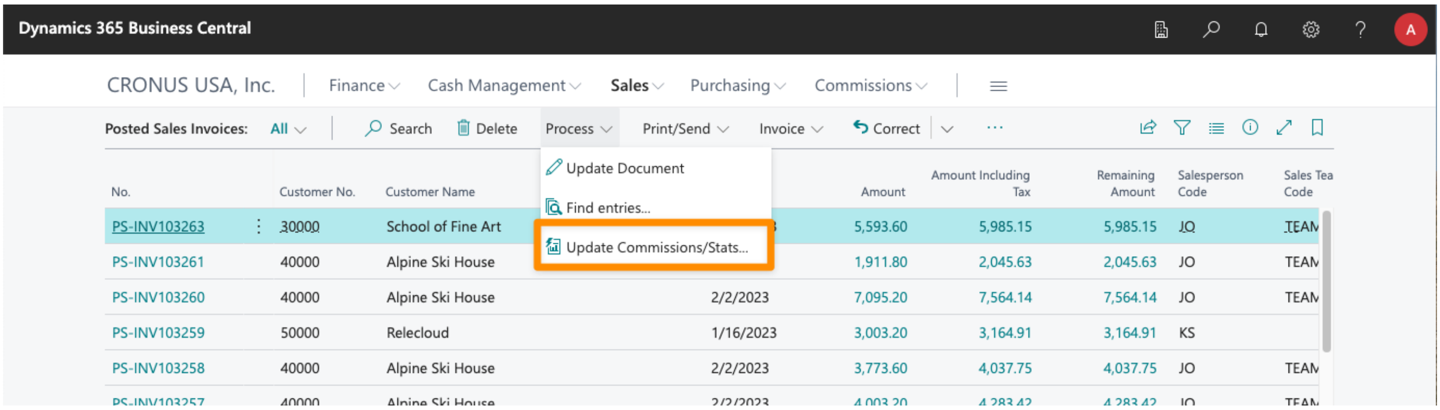
**NOTE**

Updating the main salesperson assigned to the sales invoice or credit memo will change the salesperson code and update its stats and commissions, but it will not update the dimensions assigned to the sales document (or any other fields that might have been automatically assigned to the document, when it was posted, based on the salesperson originally assigned).

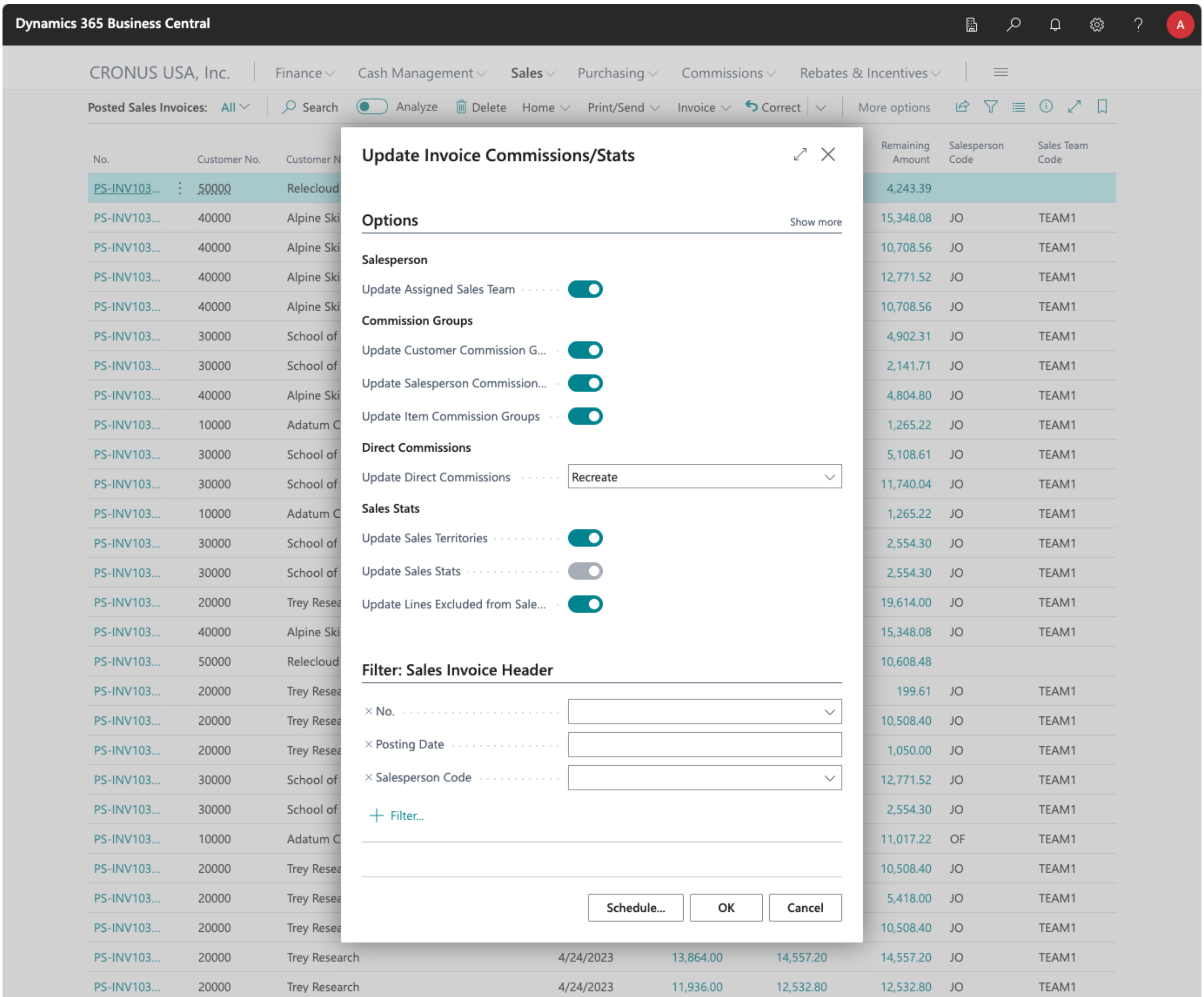
# Update/Generate Commissions & Sales Stats

Direct commissions can be generated for posted documents. This can be useful once you have finished setting up commission rates, to generate commissions for the current period, to recreate commissions if the rates were not correctly defined, or even in order to quickly tests all the different reports and features without the need to generate new sales documents.

From the *Posted Sales Invoices* and *Posted Sales Credit Memos* lists, as well as from the card pages for any of these documents, the *Update Commissions/Stats...* action will let you generate commission entries for documents that were posted before the app was installed, as well as generate/regenerate commissions after new commission rates have been setup/modified.




This report, by default, will generate or update all sales stats and commissions for the posted invoices (or credit memos) that match the selected filters:




You can enable or disable whether you want to update configuration values in the process (commission groups, territory, sales team) and whether you want to update commissions, sales stats, or both.

In the case of commissions you can choose different options:

- **None**. Commissions will not be updated.
- **Recreate**. Commissions will be deleted (if they exist) and created again.
- **Update**. Instead of deleting existing commission entries, and adjustment line will be added to each one with the difference between the current amount and the new calculated amount (if any). Non-existing commissions will be created anew.

*Recreate* has the advantage that the detailed commission entries will be simpler, as there will be one commission line for each sales line, and no adjustment lines, but *Update* has the advantage that it can be used even if any of the existing commissions has been settled.

> **NOTE**
>
> There is a simpler version of this report, called Update Direct Commissions that will *update* commissions for all posted invoices and credit memos, based on filters, without updating any configuration values. This can be useful to schedule commission updates based on adjusted costs, for example.

# Credit Memos

## Cancelled Invoices

When the *Correct > Cancel* action of *Posted Sales Invoices* is used, so that a credit memo for the full amount of the invoice is created, iDynamics Commissions will create commission entries based on the ones generated for the original invoices, cancelling the original amounts (including any manual adjustments or penalties that had been applied to them).

## Corrective/Manual Credit Memos

If a corrective or manual credit memo is created, however, even if the items and quantities are the same as the ones in the original invoice, the generated commissions might be different, as they will be generated based on the active commission rates.

# Set a specific base % for commissions

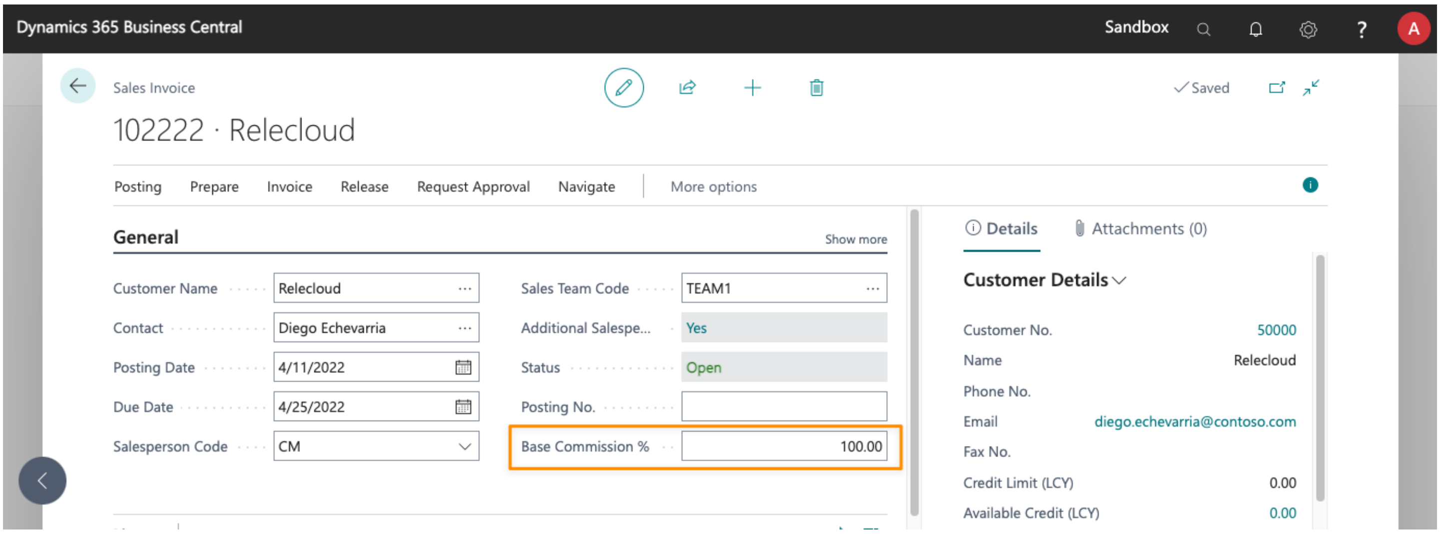
## Description

In certain scenarios, you might want to define that the salesperson (or an additional salesperson) should only get commissions on a % of the invoice amount. As we don't want to overwhelm users, and not all companies need this feature, the fields are hidden by default but can be made visible by the user.

## Main Salesperson

For the salesperson assigned to the sales header, there is a hidden *Base Commission %* field, that can be made visible, and that lets you specify the % of the sales amount (for each line) that will be used to calculate commissions.

Example scenario: when an external vendor has helped in the sale, they will get a 10% commission on the total amount. The main salesperson should get their commissions based on the remaining amount. In order to do that, you can specify that the *Base Commission %* of the document is 90%.



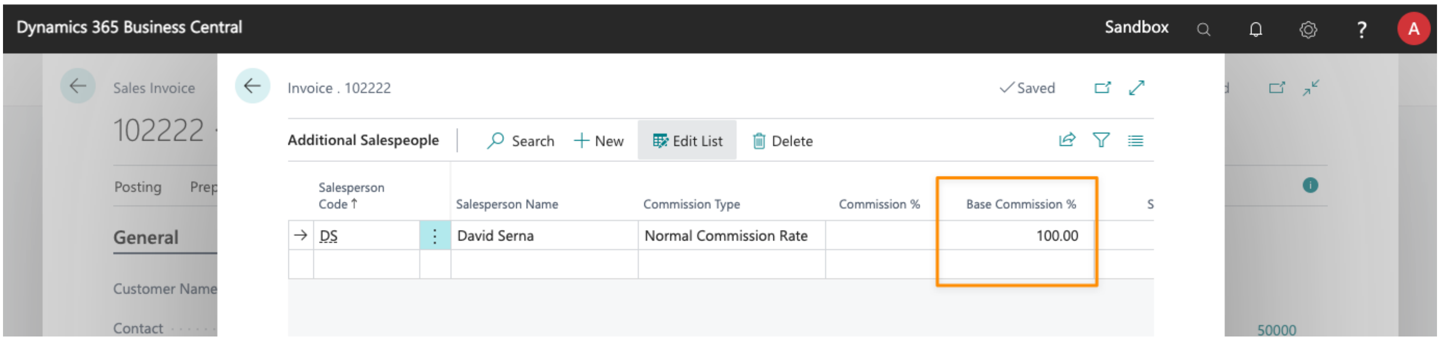

**NOTE**

In the previous screenshot the field has been made visible using the *Personalize* Business Central action.

## Additional Salespeople

Just as with the main salesperson, you can also show an equivalent *Base Commission %* field, available in the list of additional salespeople.

Example scenario: both Dylan and Laura took part in the sale, and you want that each one of them gets their own commissions (they might have different commission rates), each on half of the total sales amount. You can manage this by setting *Base Commission %* to 50% in both the sales header (for the main salesperson) and the additional salesperson record.




As in the previous screenshot, the *Base Commission %* has been made visible using the *Personalize* option, in Business Central. By default, David Serna will get his commission rate based on the full (100%) sales amount. You can lower this value, to give him a commission on just part of the sales, instead.

# Set a Manual Commission

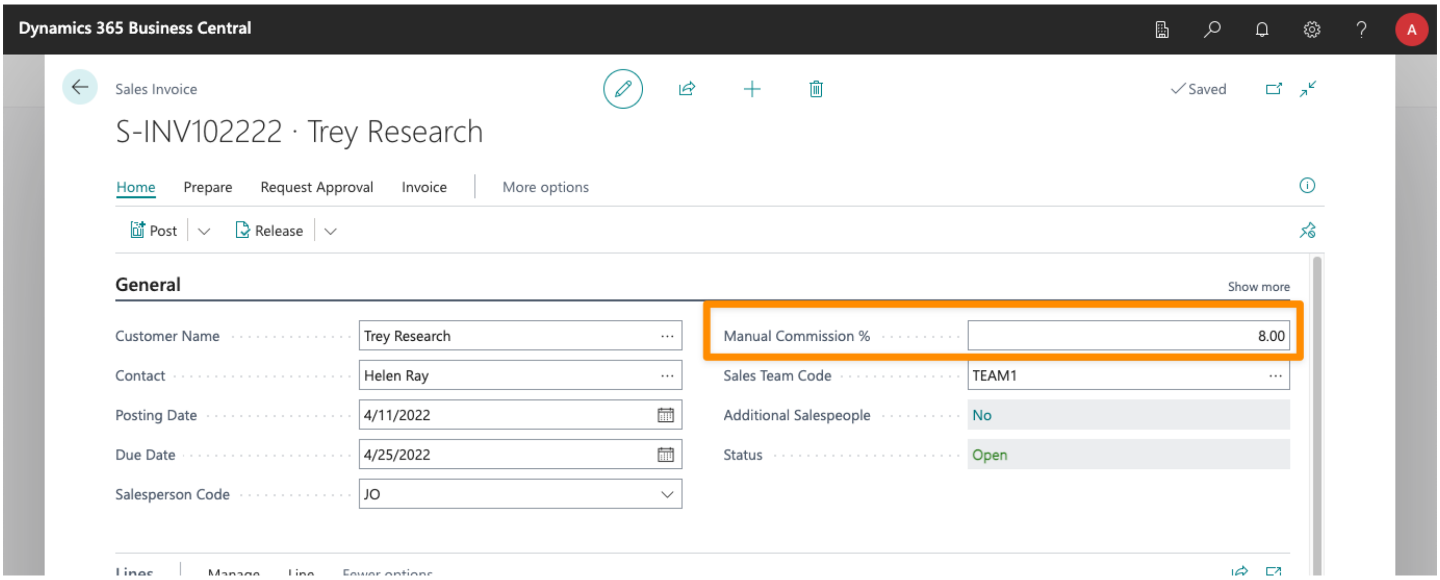
## Description

Sometimes you might want to assign a specific commission for the whole document, or some specific lines. Or maybe you have set a specific commission amount for each document/line in an external system from which you are importing some sales documents.

All of this can be done in iDynamics Commissions. The fields to do so are hidden by default, but can be made visible by *Personalizing* the page in Business Central.

## Sales Documents

iDynamics Commissions adds both *Manual Commission %* and a *Manual Commission Amount* fields to the sales header, where a specific value can be assigned. Only one of them can be filled in (when a value is entered in one of them the other will be blanked) and, if one of them has a value, it will override any commission rates defined for the main salesperson, as well as any manual commissions previously assigned to the lines.

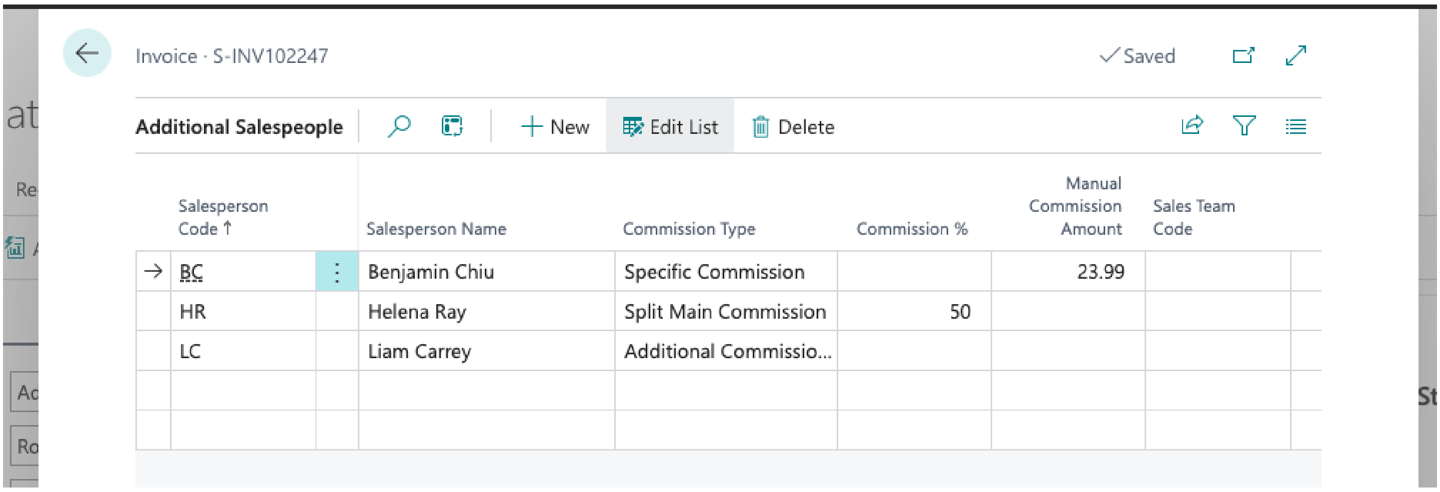



## Sales Lines

At the line level, there is also both a *Manual Commission %* (as in the header) and a *Manual Commission Amount*. These can only be used if a manual commission has not previously been assigned to the whole document and work in the same way, overriding any commission rates defined for the main salesperson.


## Additional Salespeople

You can also show the *Manual Commission Amount* field on the list of additional salespeople assigned to a sales document (or to one of its lines):




This field can only be edited when the *Commission Type* is *Specific Commission*.

# Discounts

## Description

Any discounts applied to a document will affect the way in which commissions are applied, as well as the sales statistics generated.

## Effective Line Discount

In order to calculate the discount that has effectively been applied to a line, iDynamics Commissions will get the sales price that, by default, is applied to the selected combination of customer and item, and will compare it to the unit price currently assigned (with all discounts applied).

This means that iDynamics Commissions will consider all of these as discounts:

- Manually changing the unit price.
- Assigning a discount % to the line.
- Applying a document discount (except payment discounts).

To do this last bit, iDynamics Commissions will always use the base line amount (without taxes), as Business Central already applies any document discounts to this field.

If needed, you can get more information on how iDynamics Commissions calculates this value, and how to customize it, in the developers section of the manual.

## Payment Discounts

iDynamics Commissions considers that payment discounts are something offered by the company, that should not penalize the commissions given to the salesperson nor their sales stats. If a salesperson posts a sale of $1,000, with a 10% commission, and the company decides to give the customer a 2% payment discount, iDynamics Commissions will use $1,000 as the base on which the commission will be calculated, regardless of the fact that the customer actually paid $980 for the invoice.

## Set Commissions Based on the Applied Discount

You can configure different commission rates, each one with a different *Maximum Discount %*. If you define:

- A commission rate of 4% with a maximum discount of 10%.
- Another with a 2% commission and a maximum discount of 20%.
- And another with a 1% commission and a maximum discount of 40%.

Because the salesperson will get the highest commission possible, they will get:

- A 1% if they apply a discount between 20.01 and 40%.
- A 2% commission between 10.01 and 20%.
- And a 4% commission if they apply a discount of 10% or less.

If you decide to try this combination, when you define the commission rates, remember to be careful with the *Minimum Profitability %* field. By default, the app will not generate any commissions if an item is sold below profit, but it is too easy to try to apply a 35% discount on a line to check whether the app applies a 1% commission, be surprised by the fact that the app will not generate any commission, and not notice that it is because the final price is below cost (you can set a negative *Minimum Profitability %* if needed).

> **NOTE**
>
> You can check both the effective discount % and the profit %, in the footer of the commission preview factbox.

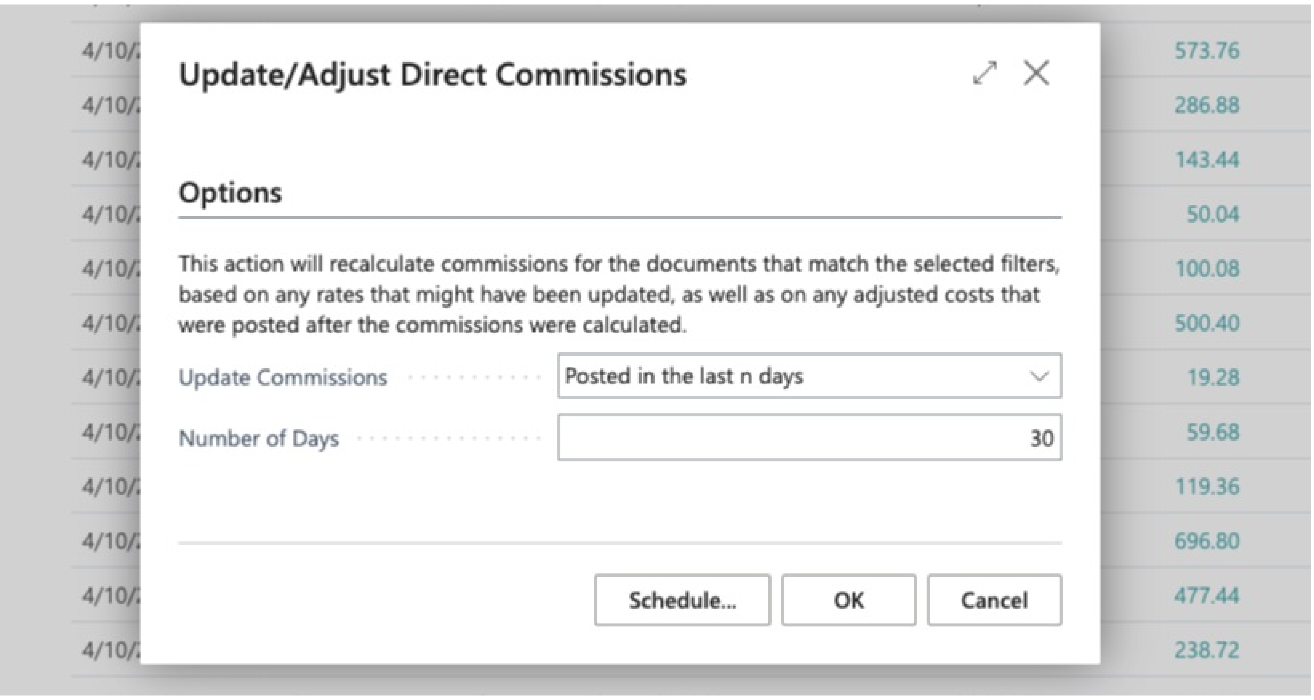
# Adjusted Costs

## Description

If you are working with commissions or sales targets based on margins, there is a good chance that, at some point, the costs of a sales documents might be updated after the sale was posted.

By the moment that the costs are adjusted, commissions will have already been generated and maybe even paid to the salesperson.

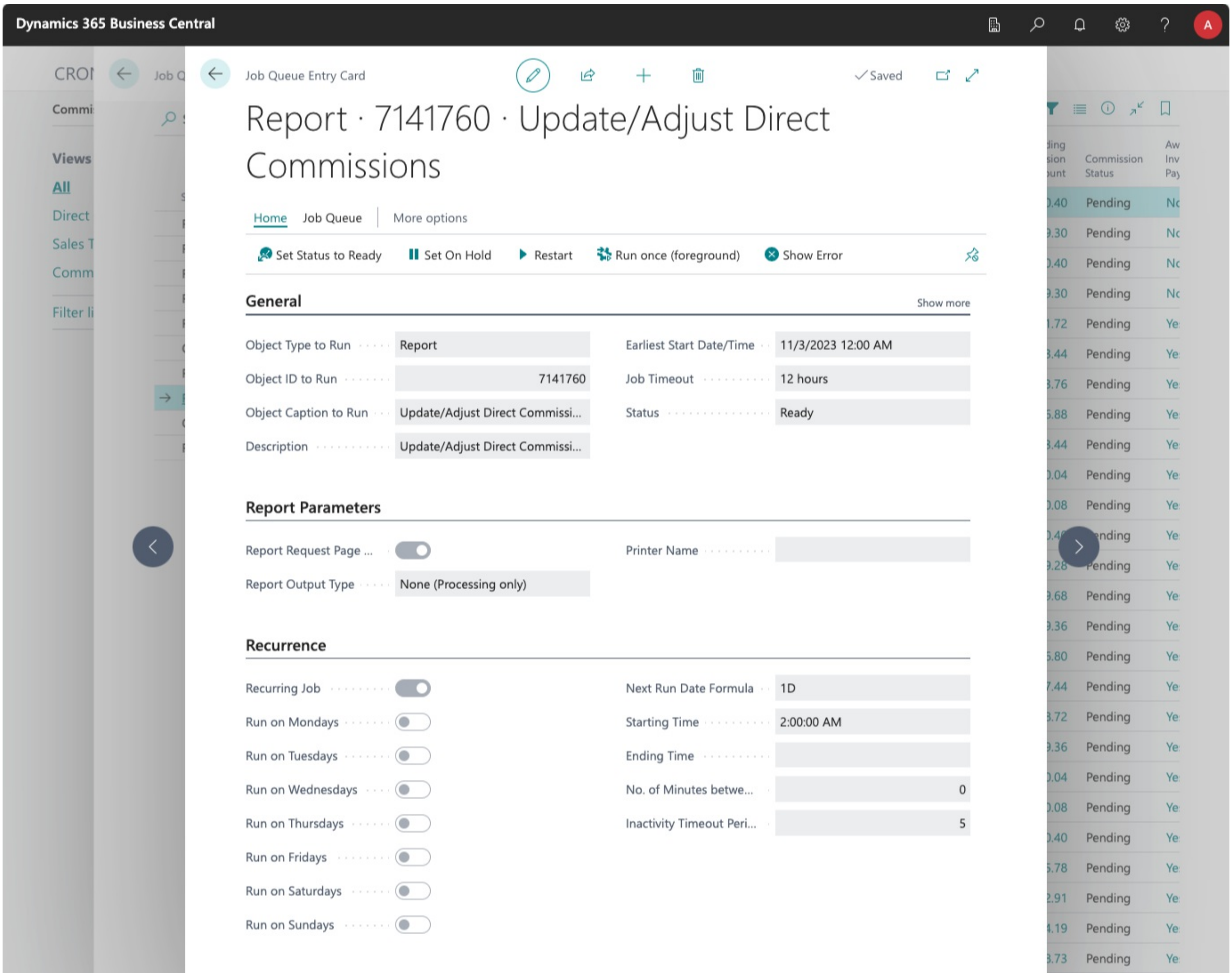
In order to update the commissions based on the new costs, you can use the Update Commissions/Sales Stats action, available in the posted sales invoices (and credit memo) list, or the simpler Update Direct Commissions action, available in the Commission Entries list.




## Schedule Commission Adjustments

You can run any of the previous reports manually, or you can sch schedule them so that commissions for invoices are updated automatically every day, based on any adjusted costs.

For this, you can setup a *Job Queue Entry* in Business Central with the following parameters:




If this is the first time that you schedule a report, remember that:

- You can choose the report parameters (e.g., which invoices should be updated) using the *Job Queue* > *Report Request Page* action.
- The *Recurring Job* checkbox is not editable. Just check the days that the report should run, or a "Next Run Date Formula", and the checkbox will be enabled automatically.
- Once you have configured it, use the *Home* > *Set Status to Ready* action to activate it.

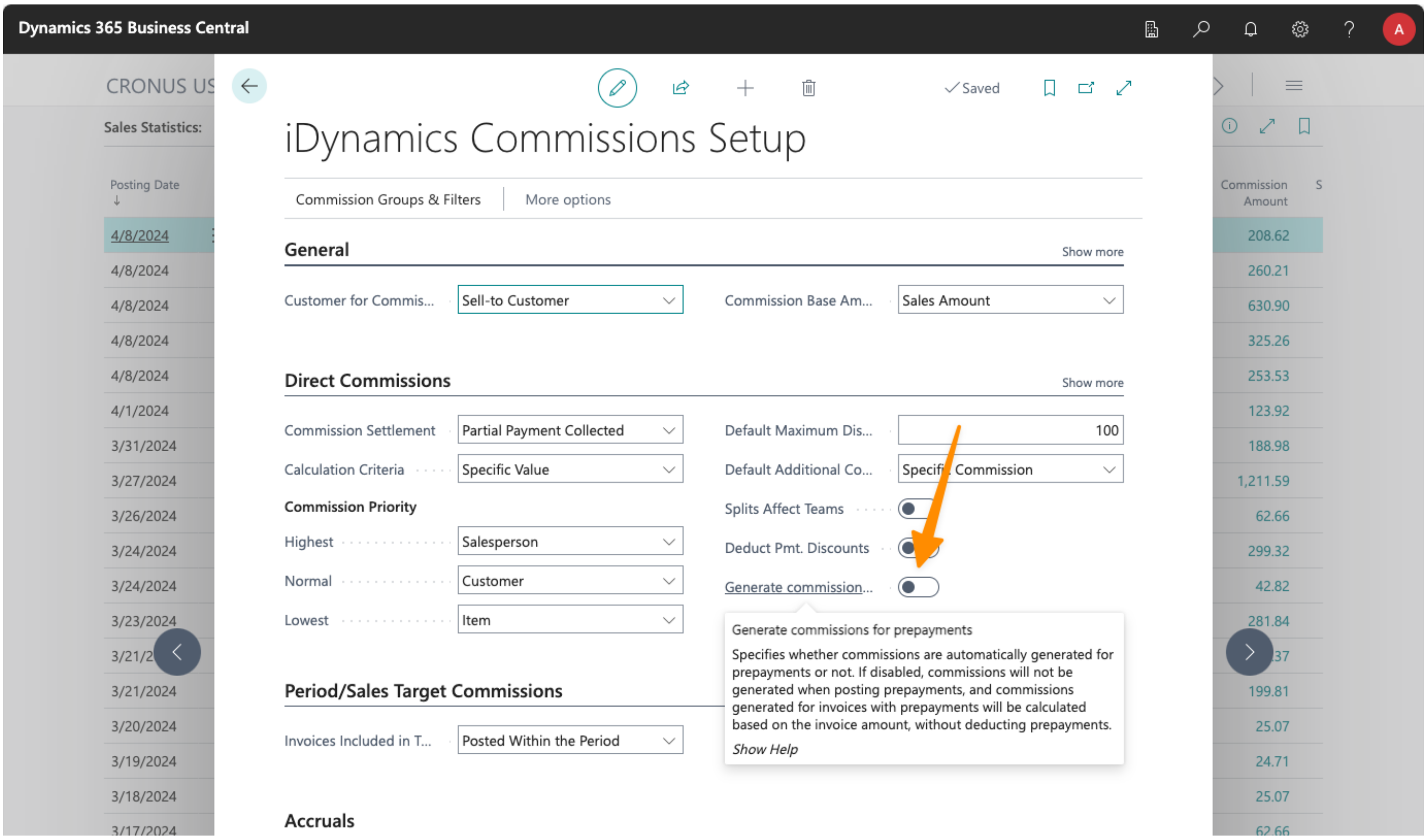
# Prepayments

## Description

Business Central gives you the option to generate prepayments for sales documents that have not been posted. iDynamics Commissions gives you the option to ignore them, so that commissions are paid after the document has actually been posted and fully paid, or to generate commissions for them, based on the contents of the sales document that is being prepaid.

## Generate Commissions

In the general setup page, you will find the option to *Generate Commissions for Prepayments*.




If you enable this option, when you post a prepayment invoice (or credit memo), iDynamics Commissions will calculate commissions for the source sales document (the one that is being prepaid), and then multiply them by the % of the document that has been prepaid.

E.g., if you prepay $1,000 on a $2,000 order, and the items would generate $50 in commissions, based on the existing rates, the prepayment would generate $25 in commissions.

When the sales document is posted, and its final commissions calculated, all commissions generated from prepayments will be automatically deducted.

# Projects

## Description

If you use the projects module in Business Central, iDynamics Commissions adds additional options to assign salespeople to each project, task, or even planning line. By default, the app will calculate and generate commissions for every invoice posted from each project, but project commission rates can be configured so that commissions are calculated from the project (e.g., based on the actual margin achieved).

## Assign Salespeople to a Project

By default, Business Central assigns invoices from each project to the salesperson assigned to the customer on their card. Our app extends BC so you can override this behavior and individually define the salespeople assigned to each project.

Learn how to assign salespeople to projects

## Tasks and Planning Lines

Although the fields are hidden by default, the app lets you assign salespeople to both tasks and planning lines, either overriding the main salesperson assigned to the project or simply adding additional salespeople.

Learn how to assign salespeople to tasks and planning lines

## Project Commission Rates

By default, iDynamics Commissions will generate commissions for invoices posted from a project. By defining project rates, you can post commissions directly from the project. This way, you can post commissions based on both the budgeted amounts/costs and the actual project margin, regardless of what has been invoiced.

Learn how to use project-specific commission rates

## Advanced Options

There are a few extra options that are not visible by default, including the option to specify a manual commission percentage either for the whole project or for a specific planning line.

Learn about the advanced options available

## Commission Advances

iDynamics Commissions lets you generate commissions immediately after you define the project in Business Central, before any invoices have been issued. This can be useful if you want to pay part of the commissions to your salespeople after they sign a project, but before it's actually invoiced.

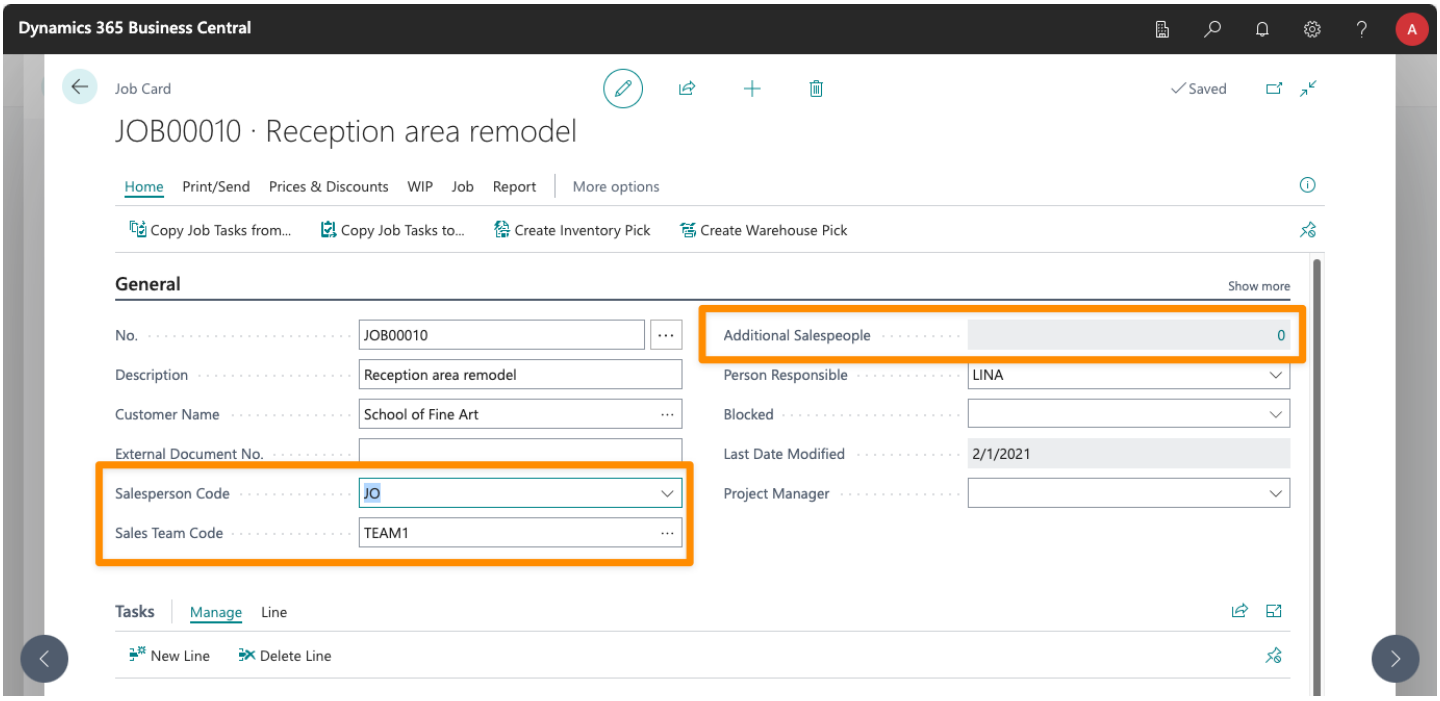
Learn how to give commission advances for projects

# Assign Salespeople to Projects

## Description

By default, Business Central assigns invoices from each project to the salesperson assigned to the customer on their card. iDynamics Commissions extends BC so that you can override this behavior and individually define the salespeople assigned to each project.

On the job/project header, in Business Central, you will find the same fields that are usually available in a sales document (salesperson, team, additional salespeople, territory).

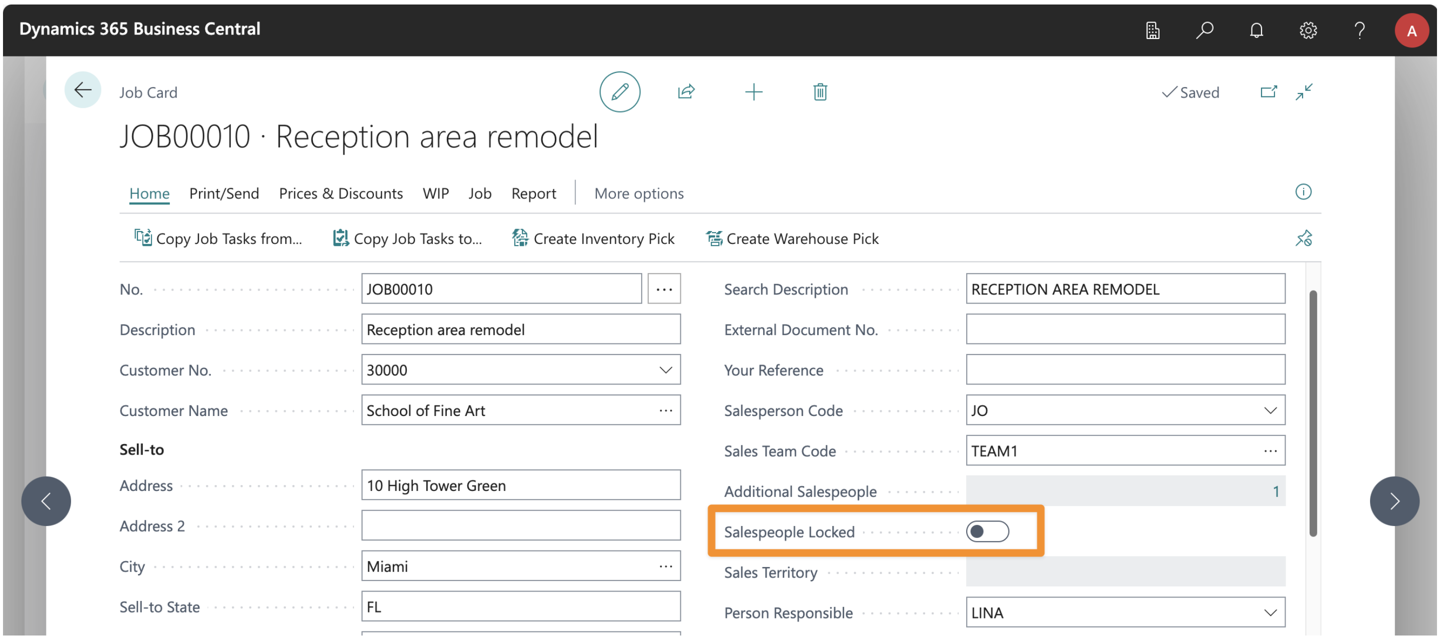



These will be automatically assigned to a new project depending on whether you have the *Jobs > Assign Salespeople Automatically* option enabled, in the Commissions Setup page.

If no salespeople are selected, the default salespeople for the customer will apply to each sales invoice created from the project. If salespeople are specified for the project, they will be assigned to every *sales line* generated for the project.

## Lock Salespeople

If salespeople are automatically assigned to jobs, but you want to make sure that they don't change even if the customer or ship-to address changes, or you just want to lock them so that regular users can't update them, clicking on *Show more* in the *General* tab, will show the *Salespeople Locked* field.

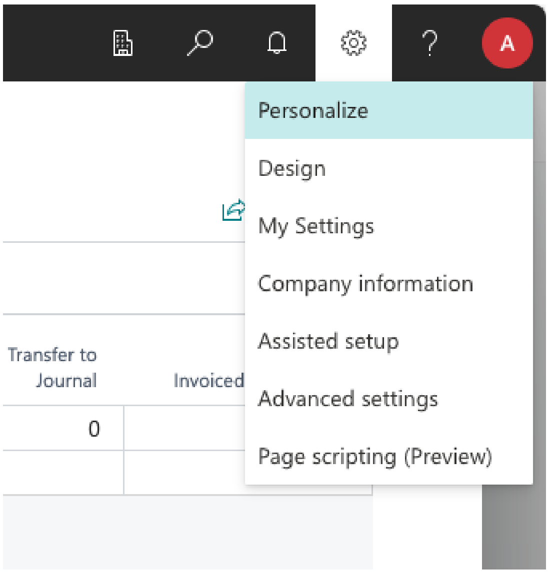



This field can only be edited by users with permissions in the app and lets you lock the salespeople (and teams) assigned to the job/project.

# Project Planning Lines

## Description

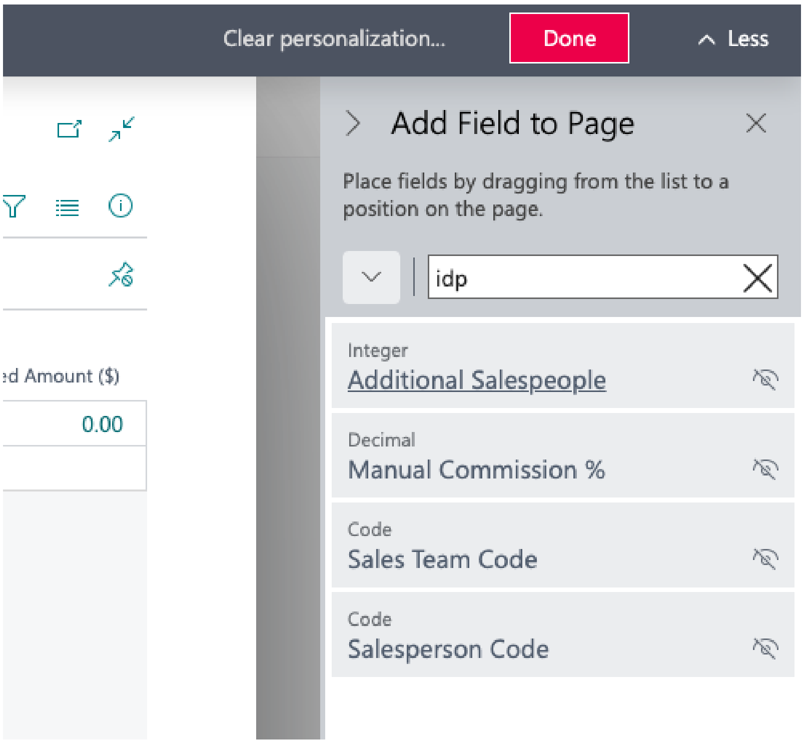
As with sales lines, you can assign specific salespeople to each task or planning line. These fields are hidden by default, though, and need to be shown by using the Personalize option of Business Central, either for the current user or for a BC profile.




## Assigning Salespeople to Tasks and Planning Lines

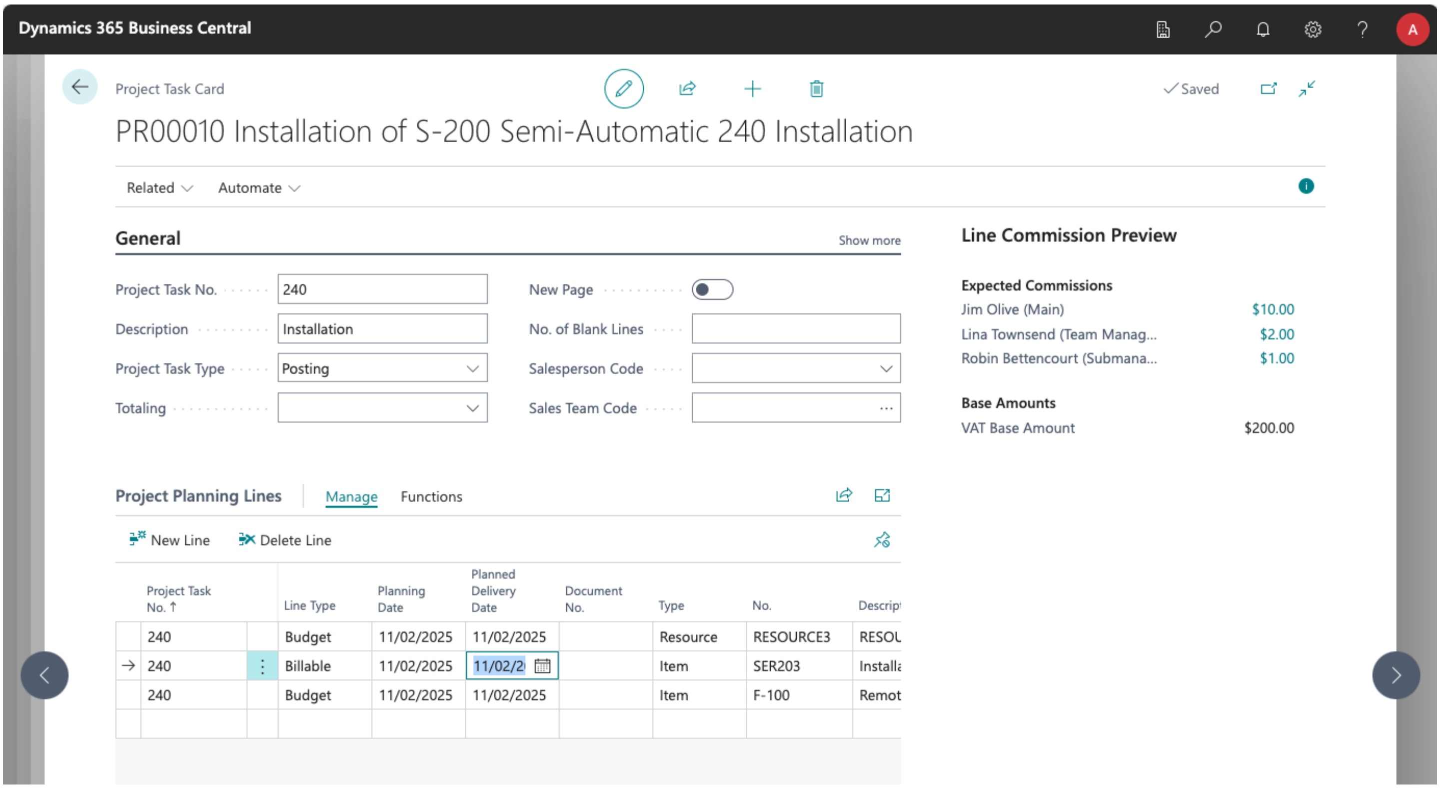
When you personalize the page, if you filter by "IDP" (this is the internal prefix for the fields in our app), you will see the following fields:

- **Salesperson Code**. The main salesperson who should receive commissions from the selected line.
- **Additional Salespeople**. As in sales documents, this can be used to assign extra salespeople and/or define commission splits.
- **Sales Team Code**. This can be useful if the main salesperson has been assigned to multiple teams and you want to choose which one should receive commissions from this line.



# Preview Commissions

As in sales documents, you can preview commissions for any billable planning line, using the included factbox.




# Other Options

As with the project, you can assign a manual commission % to each planning line.

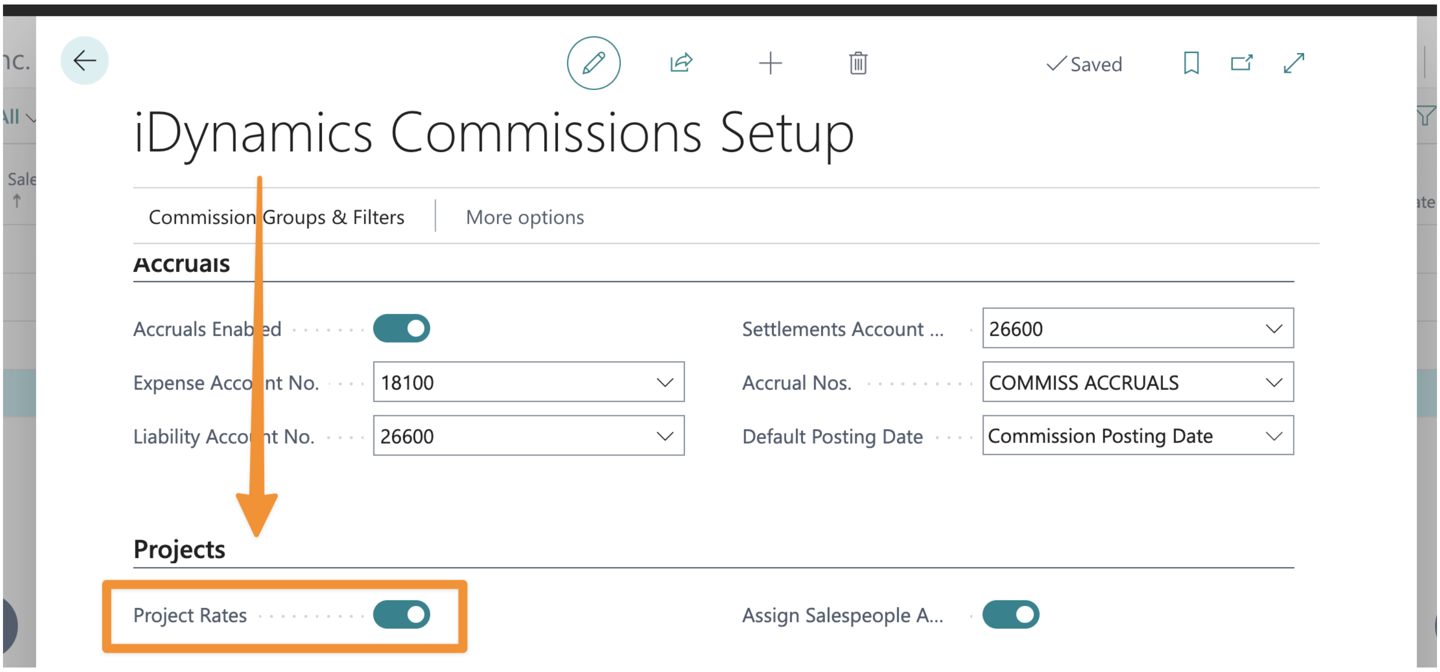
# Project Commission Rates

## Description

By default, iDynamics Commissions generates commissions for invoices posted from a project. By defining project rates, you can post commissions directly from the project. This allows you to post commissions based on both budgeted amounts/costs and the actual project margin, regardless of what has been invoiced.

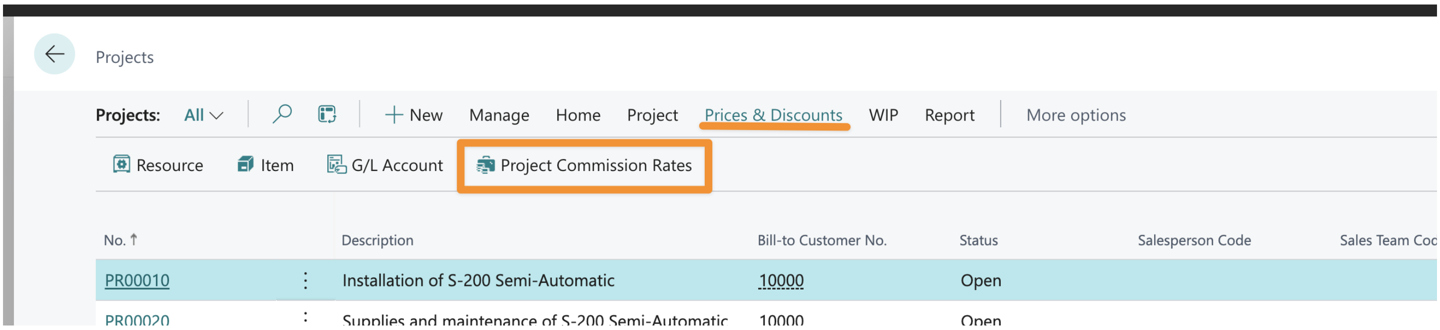
## Enabling Project Commission Rates

To use project commission rates, open the Commissions Setup page and enable the *Project Rates* option within the *Projects* tab.

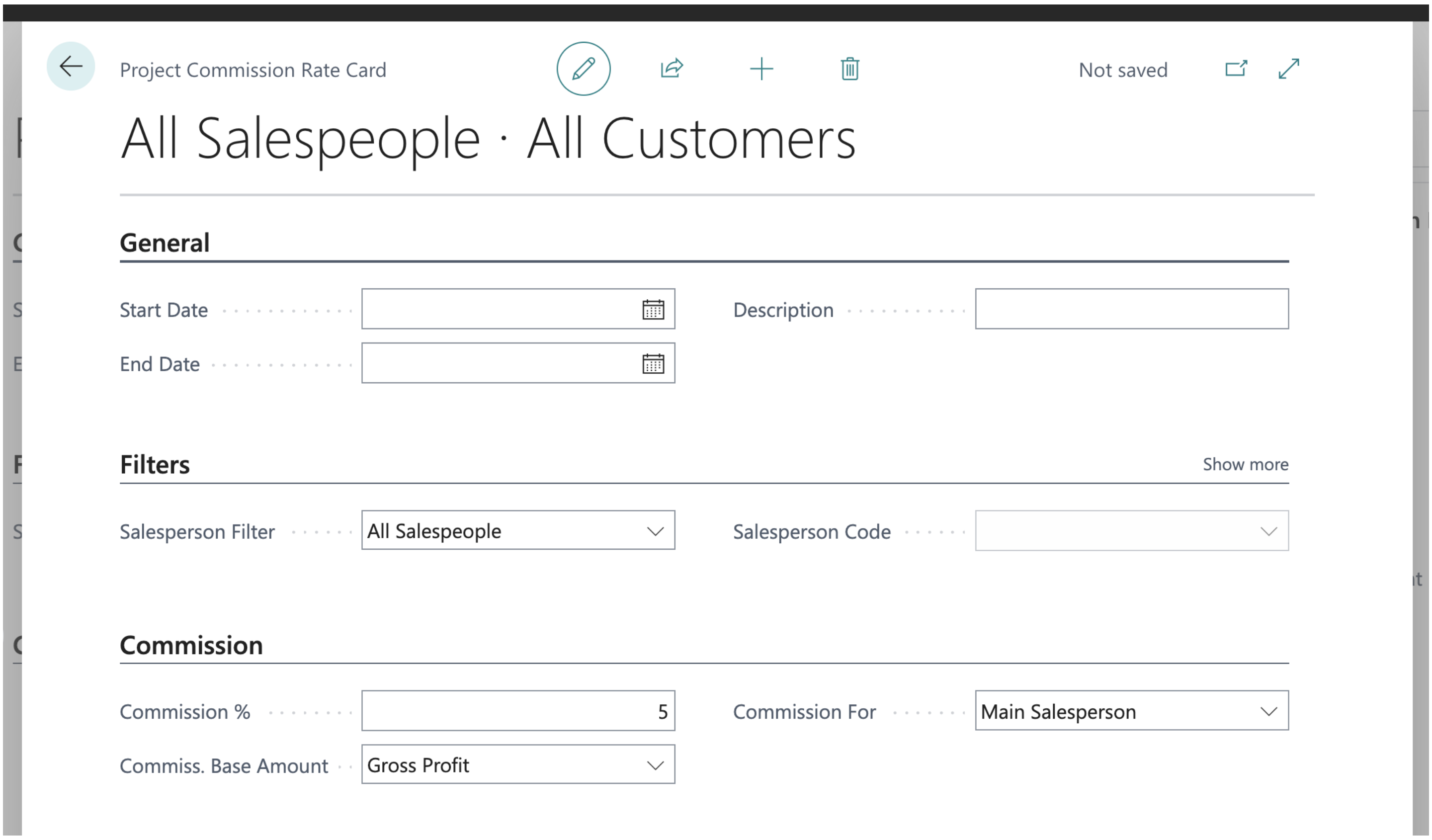



## Defining Commission Rates

You can access the list of project commission rates by searching for them using the Business Central search function, or by selecting the *Project Commission Rates* action in the *Prices & Discounts* tab of the Project list (after enabling the option).

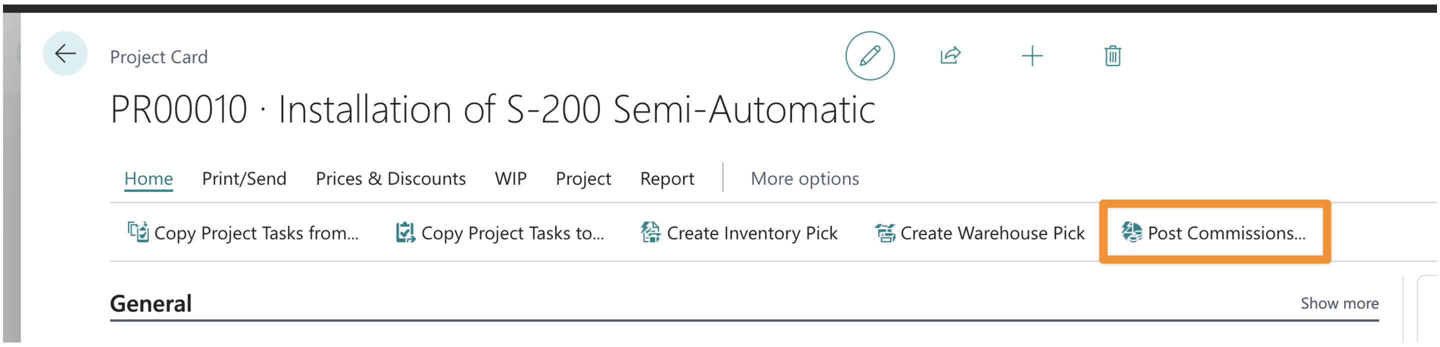



The available options are a subset of those for direct commission rates. This is because, to calculate the actual margin for a project, commissions are calculated by task rather than by planning line.

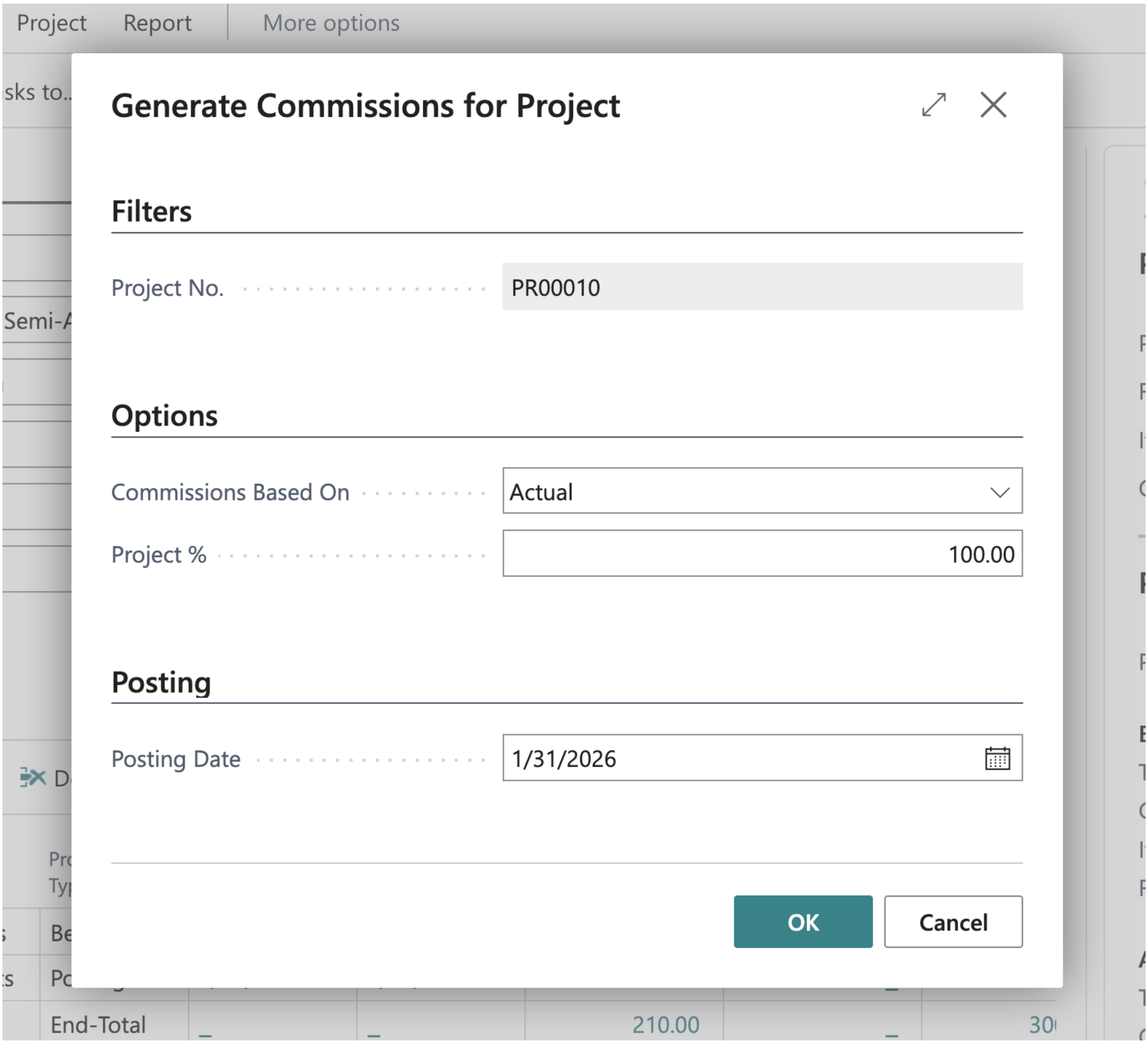



## Posting Commissions

Project commissions can be posted at any time using the *Post Commissions...* action in the *Home* menu of the project card.




The app calculates the applicable commissions based on the current data and posts new commission entries for the difference since the last time the process was run.




The following options are available:

- **Commissions Based On**: Post commissions based on the actual costs and invoices posted for the project, or on the budgeted amounts. The latter is useful if you pay a percentage of the project commissions when it is signed.
- **Project %**: Specify what percentage of the project's commissions you want to post. This is useful if you pay a percentage of the project when certain milestones are met, rather than the full amount at the end.
- **Posting Date**: The date on which the commissions will be posted.

Once commissions have been posted, you can view all commission entries for the project using the *Project* > *Commissions* action in the project card.

# Projects - Advanced Options

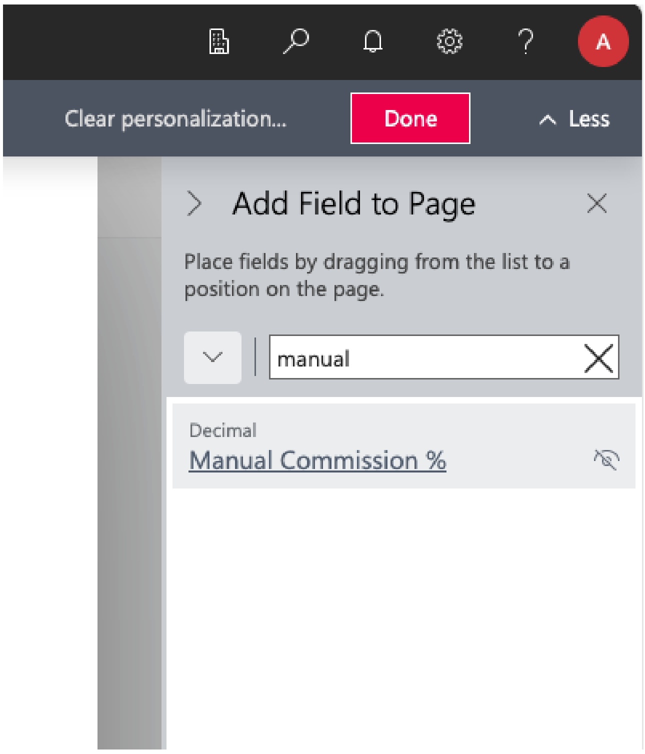
## Description

As in other areas of Business Central, iDynamics Commissions adds a few extra features to Projects that are not visible by default, in order to avoid overloading the user interface.

## Custom Commission %

Available both in the project card and in the project planning lines, the *Manual Commission %* field can be made visible to assign a specific commission % to each one.

This % will be automatically copied to the sales lines generated when a project is invoiced in Business Central.

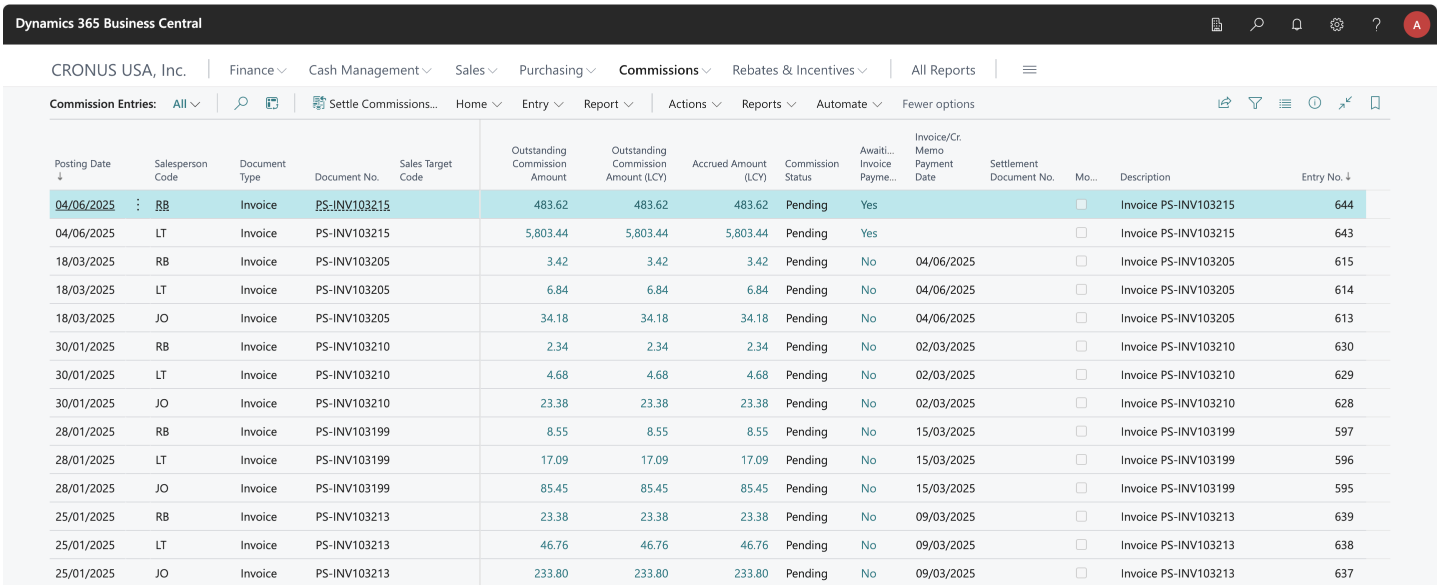


# Commission Entries

## Description

Commission entries are generated every time that a commission is given to a salesperson, either because a sales document was posted, a sales target was achieved, or a commission was manually entered into the system.

They not only give us information on the commission and its source, but also on its *settlement* status (whether the commission has been paid to the salesperson or not), and whether the source invoice (if there is one) has been paid by the customer or not.




| Posting Date | Salesperson Code | Document Type | Document No. | Sales Target Code | Outstanding Commission Amount | Outstanding Commission Amount (LCY) | Accrued Amount (LCY) | Commission Status | Awaiti... Invoice Payme... | Invoice/Cr. Memo Payment Date | Settlement Document No. | Mo... | Description | Entry No. |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 04/06/2025 | RB | Invoice | PS-INV103215 | | 483.62 | 483.62 | 483.62 | Pending | Yes | | | | Invoice PS-INV103215 | 644 |
| 04/06/2025 | LT | Invoice | PS-INV103215 | | 5,803.44 | 5,803.44 | 5,803.44 | Pending | Yes | | | | Invoice PS-INV103215 | 643 |
| 18/03/2025 | RB | Invoice | PS-INV103205 | | 3.42 | 3.42 | 3.42 | Pending | No | 04/06/2025 | | | Invoice PS-INV103205 | 615 |
| 18/03/2025 | LT | Invoice | PS-INV103205 | | 6.84 | 6.84 | 6.84 | Pending | No | 04/06/2025 | | | Invoice PS-INV103205 | 614 |
| 18/03/2025 | JO | Invoice | PS-INV103205 | | 34.18 | 34.18 | 34.18 | Pending | No | 04/06/2025 | | | Invoice PS-INV103205 | 613 |
| 30/01/2025 | RB | Invoice | PS-INV103210 | | 2.34 | 2.34 | 2.34 | Pending | No | 02/03/2025 | | | Invoice PS-INV103210 | 630 |
| 30/01/2025 | LT | Invoice | PS-INV103210 | | 4.68 | 4.68 | 4.68 | Pending | No | 02/03/2025 | | | Invoice PS-INV103210 | 629 |
| 30/01/2025 | JO | Invoice | PS-INV103210 | | 23.38 | 23.38 | 23.38 | Pending | No | 02/03/2025 | | | Invoice PS-INV103210 | 628 |
| 28/01/2025 | RB | Invoice | PS-INV103199 | | 8.55 | 8.55 | 8.55 | Pending | No | 15/03/2025 | | | Invoice PS-INV103199 | 597 |
| 28/01/2025 | LT | Invoice | PS-INV103199 | | 17.09 | 17.09 | 17.09 | Pending | No | 15/03/2025 | | | Invoice PS-INV103199 | 596 |
| 28/01/2025 | JO | Invoice | PS-INV103199 | | 85.45 | 85.45 | 85.45 | Pending | No | 15/03/2025 | | | Invoice PS-INV103199 | 595 |
| 25/01/2025 | RB | Invoice | PS-INV103213 | | 23.38 | 23.38 | 23.38 | Pending | No | 09/03/2025 | | | Invoice PS-INV103213 | 639 |
| 25/01/2025 | LT | Invoice | PS-INV103213 | | 46.76 | 46.76 | 46.76 | Pending | No | 09/03/2025 | | | Invoice PS-INV103213 | 638 |
| 25/01/2025 | JO | Invoice | PS-INV103213 | | 233.80 | 233.80 | 233.80 | Pending | No | 09/03/2025 | | | Invoice PS-INV103213 | 637 |

## Generation

Commission entries are generated when a sales document is posted, according to any direct commission rates that might have been defined, or when commissions for a sales target are posted, for example.

Learn about all the ways in which commission entries can be generated

## Available Actions

Even after a commission entry has been posted, its amounts can be adjusted or even reassigned. It can also be put on hold or cancelled if something was wrong with the commission.

Learn about the different actions available for commission entries

## Detailed Commission Entries

The detailed commission entry table gives us insight into why the commission was generated, any changes that have been applied to it, and when/how the commission has been settled.

Learn more about detailed commission entries

## FactBoxes

The commission entries list includes several FactBoxes that offer you extra information about the selected entry.

Learn more about the included FactBoxes

# Review and Adjust Commissions

At the end of a period, the adjustment journal lets you review all of the generated commissions, and make quick changes to the amounts if needed.

Learn more about the adjustment journal

# Import Commissions

For customers that generate commissions in an external app, the import journal lets you bring them into Business Central, so that you can handle them with iDynamics Commissions, and get reports on them.

Learn more about the commission import journal

# Generate Commission Entries

## Description

There are several ways in which commission entries can be generated: when a sales document is posted, if direct commission rates have been set up, manually from posted sales document lists, running the *Generate Commissions...* action for a period/sales targets, and manually or from the import journal.

## Posting a Sales Document

When a sales invoice or credit memo is posted in Business Central, *iDynamics Commissions* creates commission entries for each salesperson that will get direct commissions from the document. Detailed movement entries are also created, detailing how much commission they got from each sales document line.

You can preview the commission entries that will be generated by a sales document before it is actually posted.

## From Posted Documents

Direct commissions can be generated for posted documents. This can be useful once you have finished setting up commission rates, to generate commissions for the current period, to recreate commissions if the rates were not correctly defined, or even in order to quickly tests all the different reports and features without the need to generate new sales documents.

You can get more information on how to generate commissions from posted sales documents in this chapter of the docs.

## Posting Commissions for a Sales Target/Period

If sales targets have been set for a period, the *Generate Commissions...* action will generate commission entries for each salesperson that has achieved any of the sales targets assigned.

You can get more information about configuring sales targets and generating their commissions in the Sales Target Commissions chapter.

## Manually

You can create manual commissions directly from the *Commission Entries* list, using the *New* > *Manual Commission...* action.

## Using the Import Journal

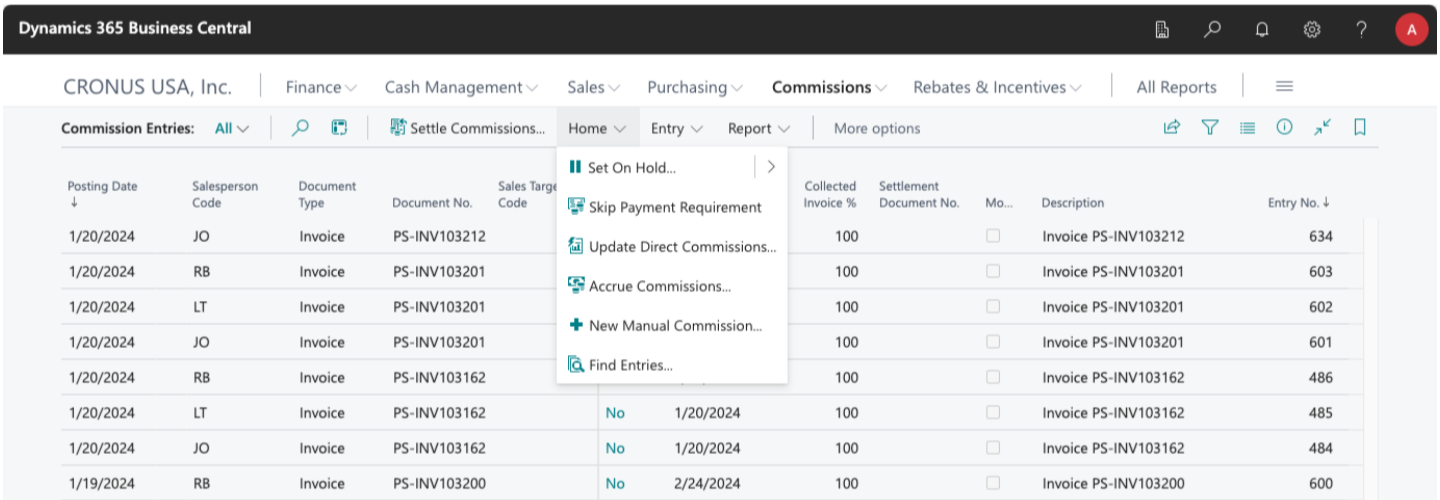
For customers that generate commissions in an external app, the import journal lets you bring them into Business Central, so that you can handle them with iDynamics Commissions, and get reports on them.

Learn more about the commission import journal

# Available Actions

## Description

Even after a commission entry has been posted, its amounts can be adjusted or even reassigned. It can also be put on hold or cancelled if something was wrong with the commission.



## Settle Commissions

The *Settle Commissions...* action, directly in the action bar, lets you generate settlement documents or purchase invoices, with which to settle any outstanding commissions.

You can learn more about this process, and about how commissions are settled using the app, in the Settle Commissions chapter.

## Put Entries on Hold

One or more commissions can be put on *On Hold* status, using the *Home* > *Set On Hold...* action. Actions in this state cannot be added to purchase or settlement documents, and thus cannot be settled.

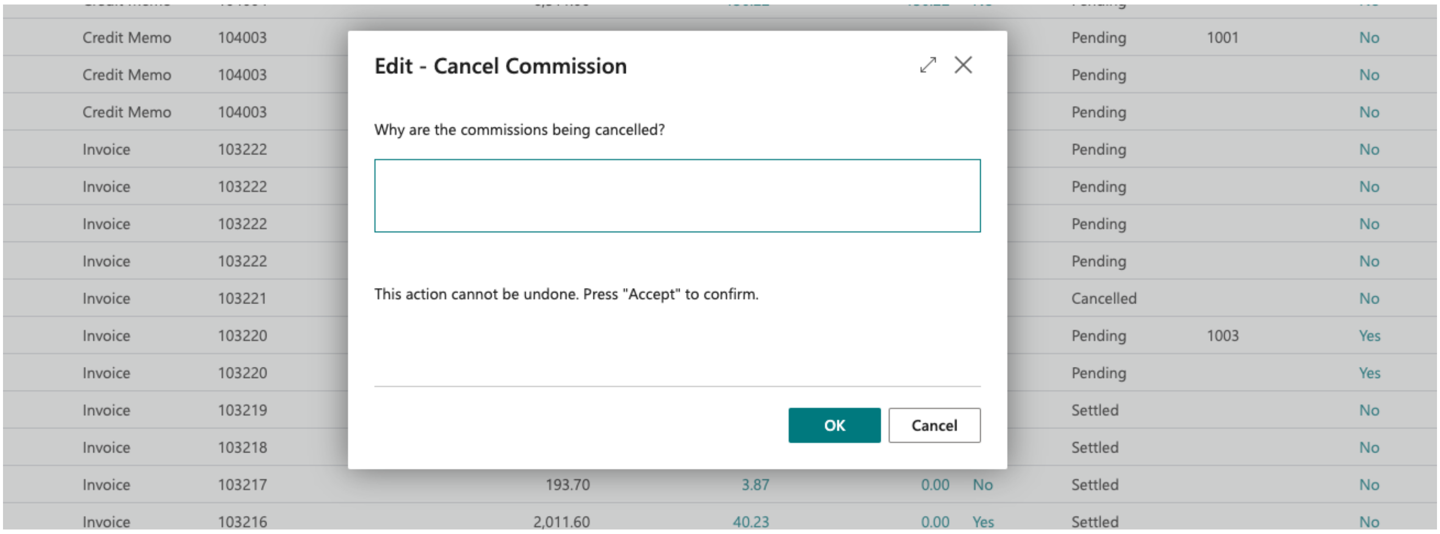
This action is useful if a commission entry needs to be reviewed for any reason, and you want to prevent it from being added by mistake to a settlement document.

The action will show a dialog requesting a small comment specifying why the commissions have been put on hold. When confirmed, a detailed commission entry of type "On Hold" will be added to the entry, including the specified comment.

Once the commission can be reviewed, it can be reactivated by using the *Home* > *Continue* action, which replaces the *Set On Hold* action on entries already on hold. This action will delete the "On Hold" detailed commission entry and return the commission entry to its *Pending* status.

## Cancel Commission Entries

One or more commission entries can be cancelled using the *Cancel...* action, available from the dropdown to the right of the *Set On Hold* action. This will create a detailed commission entry of type "Cancellation" for the total commission amount and will close the entry without any related settlement document.

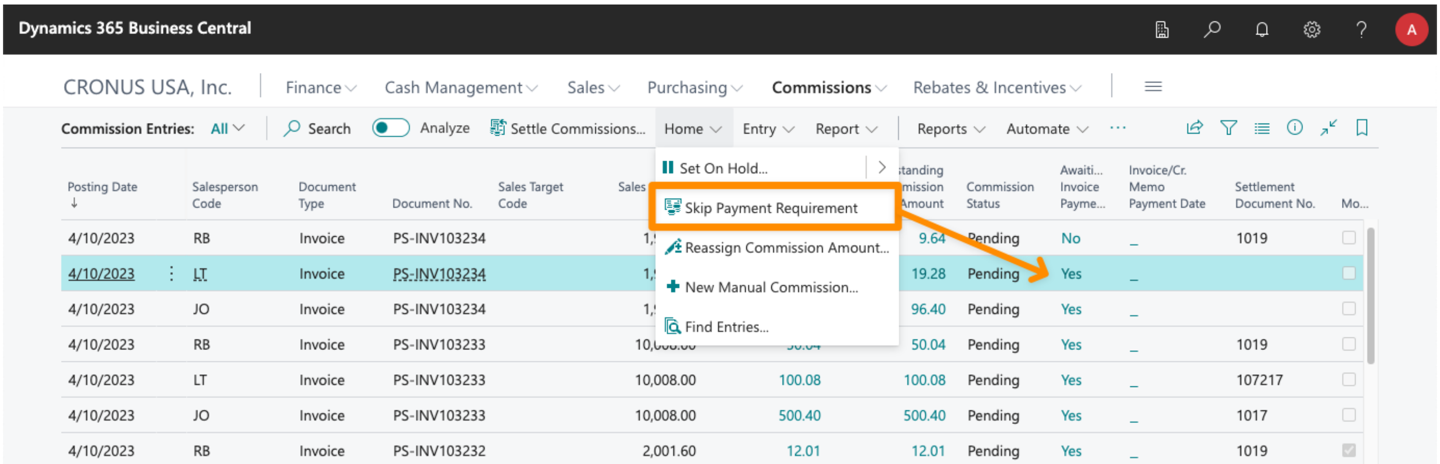



**⚠ CAUTION**

Commissions that have already been settled (either totally or partially), or that are currently assigned to a settlement or purchase document can not be cancelled.

## Skip Customer Payment Requirement

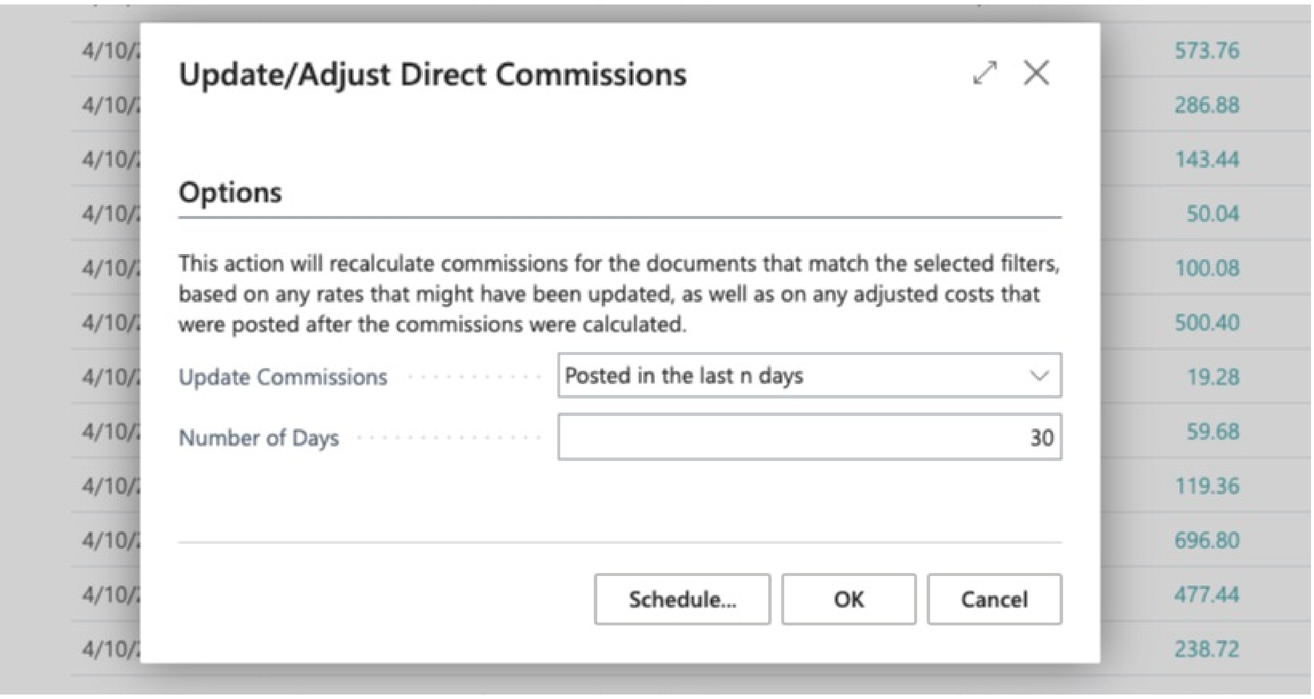
This action is only available if you have configured the app so that commissions can only be settled after the customer pays the sales invoice, and lets you skip this requirement on a per-commission basis so that certain commissions can be paid to the salesperson, even though the customer has not paid the sales invoice yet.




This action can only be applied to commission entries where the *Awaiting Invoice Payment* is *Yes*, and the action can be undone (a *Restore Payment Requirement* action will appear instead).

## Update Direct Commissions

This action is a simplified version of the Update Commissions/Sales Stats action, available in the posted invoices (and credit memos) list, without updating any commission groups, based on any adjusted costs or updated commission rates.




You can check the section about adjusted costs if you have defined commissions based on gross profits and want to schedule this report so that commissions are updated automatically when the costs of a sales invoice are adjusted.

## Accrue Commissions

If the feature has been enabled, you can manually accrue commissions using this action. You can find more information in the accruals section on how to setup the G/L accounts used for accruals, and on how to schedule this process so that it's done automatically rather than manually.

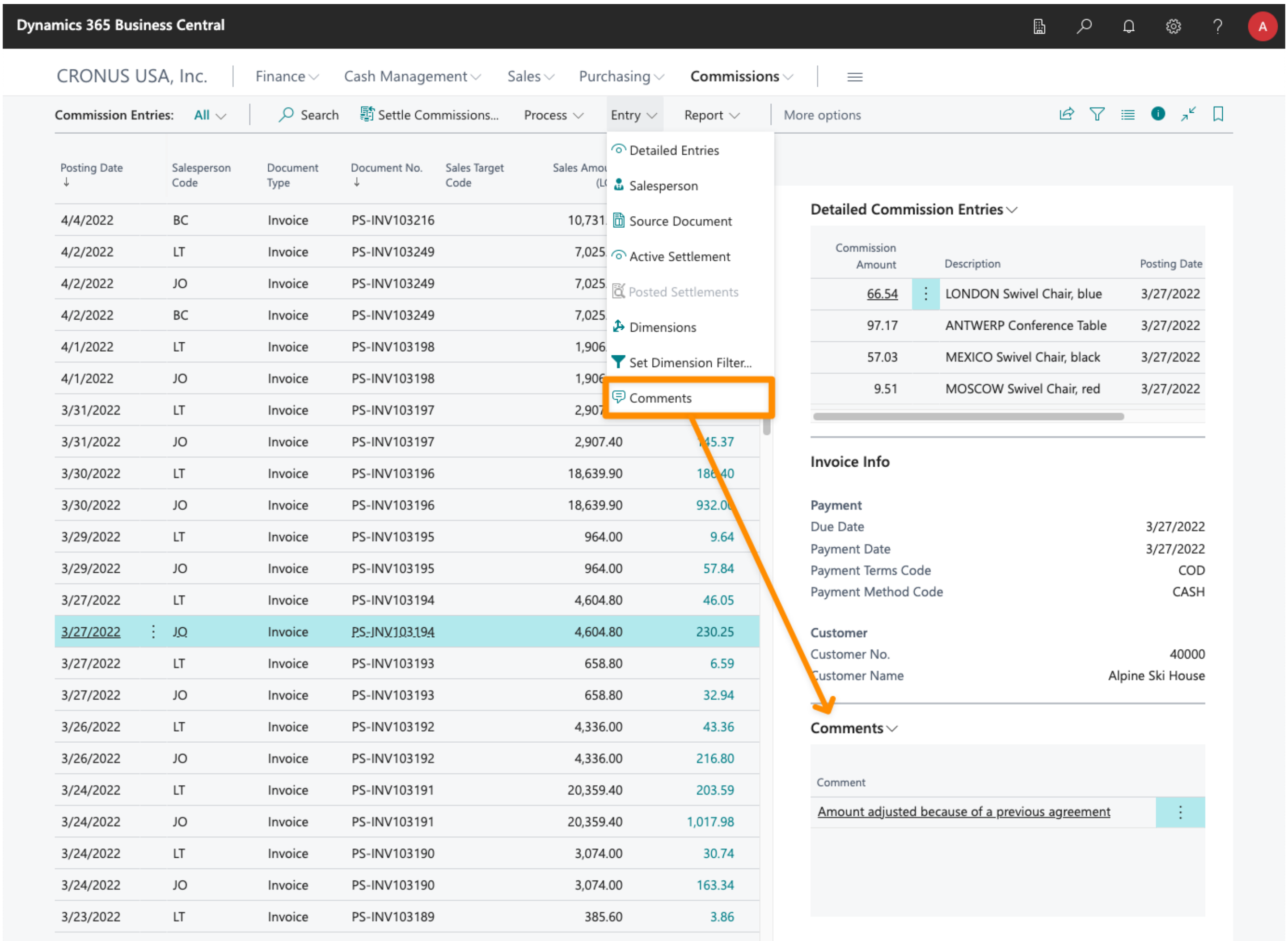
## Create Manual Commission Entries

You can create manual commissions directly from the *Commission Entries* list, using the *Home > New Manual Commission...* action. You can also use the import journal if you want to add more than one manual commission at a time.

## Add Comments

The app lets you add notes/comments to the entries, using the *Comments* action in the *Entry* menu.

These comments can be viewed both from the list that will be shown using that action and from the factbox included in the list.



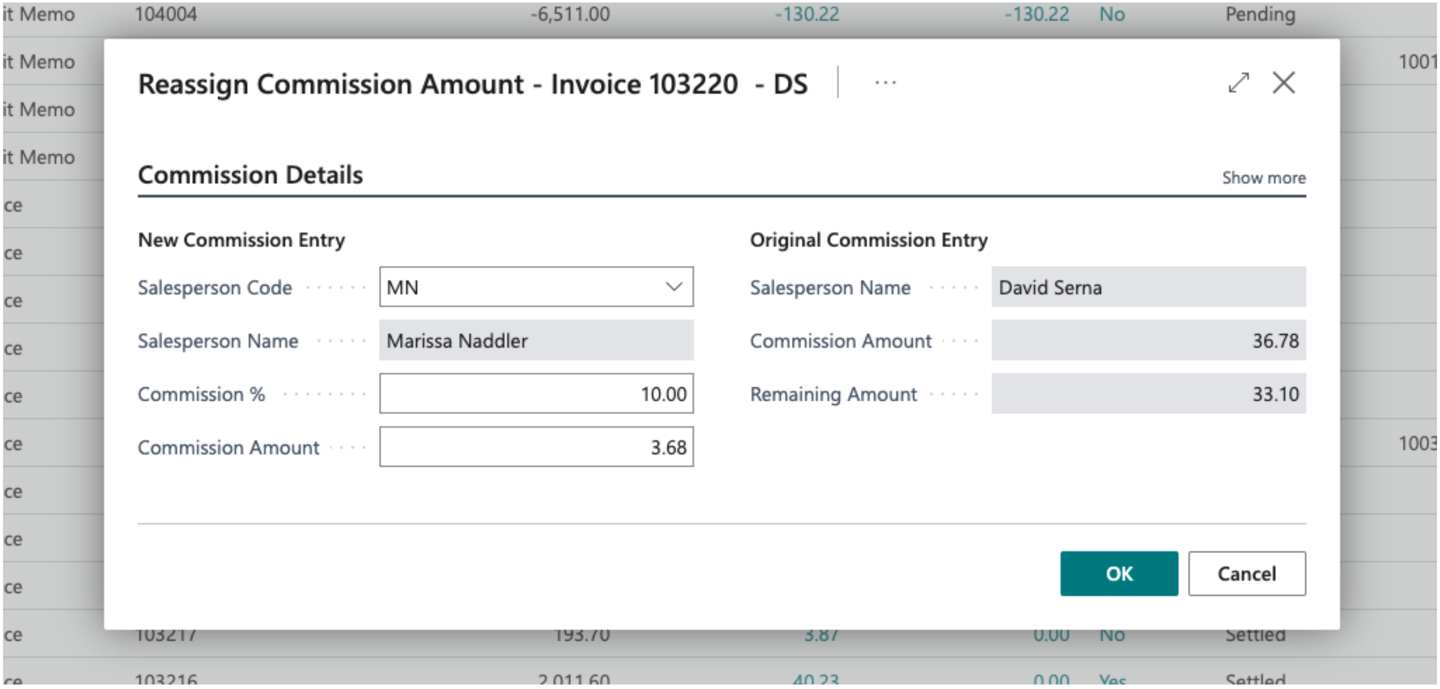

## Show All Detailed Commission Entries

This action, in the *Actions* menu (you'll have to click on *More options* to see it), lets you navigate to a list where all detailed commission entries are shown. This can be useful if you want to run queries on them, use the Analysis view, or just export them.

## Reassign Commission Amounts

Also available in the *Actions* menu, the amount of the selected commission entry can be assigned (totally or partially) to a different salesperson.

Reassigning the commission amount will create a new detailed commission entry adjusting the amount for the selected entry, and will create a new commission entry for the new salesperson/invoice/sales target (unless one already existed) and a new detailed commission entry with the assigned amount.




**NOTE**

Reassigning a commission amount will not update any sales statistics for the original sales document/target (when running reports, the sales amount will still be assigned to the original salesperson). While this option is still available, we recommend that you use the new options to edit posted documents, that will update not just the posted document, but also its commissions and sales stats.

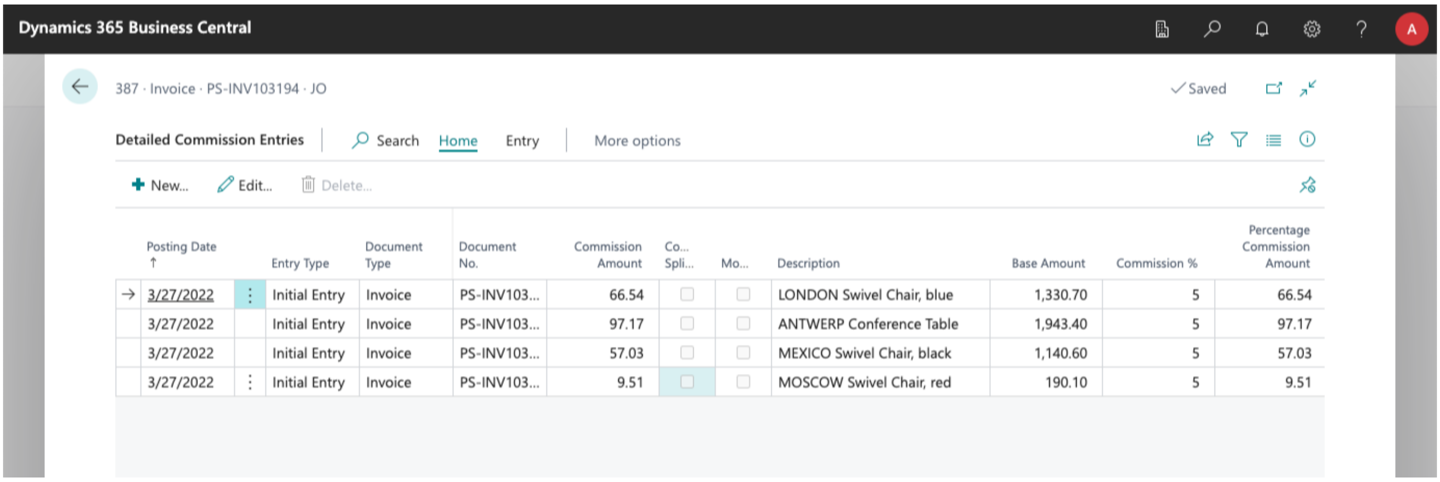
# Detailed Commission Entries

## Detailed Entries

Using the *Detailed Entries* action, available in the Commission Entries list, we can check all the different commissions generated for the source document or sales target, in addition to any adjustments made to them, any penalties applied, or any settlement entries.

Detailed commission entries let you see what commissions were generated by each sales line, including the base amount on which the commission was calculated, which commission % was applied, any existing fixed commission amount and, for direct commissions, information about the source line and whether the commission was obtained because the salesperson was the main salesperson, additional, or boss.

All detailed commission entries, except those of type "Settlement", "On Hold" and "Cancellation", inherit dimensions from the source document (the invoice, credit memo or sales target), and can be filtered by them.




## Add Detailed Commission Entries

From the detailed commission entries list, the *New...* action lets you create new entries that affect the total commission amount.

This can be useful, for example, to assign an extra commission amount for an invoice, that is not linked to any particular sales line. Or to create a negative commission entry, that subtracts part of the commission amount generated for the sales document or sales target.

Just like when editing commission amounts, the commission amount cannot be set to zero by creating a new detailed entry, and the action will be disabled if the commission entry is currently assigned to an active settlement document or a purchase invoice.

The *Delete...* action in the detailed commission entries list will only be enabled for this type of entry.

In this video you can find out how to adjust detailed commission entries and how to partially reassign a commission to another salesperson:

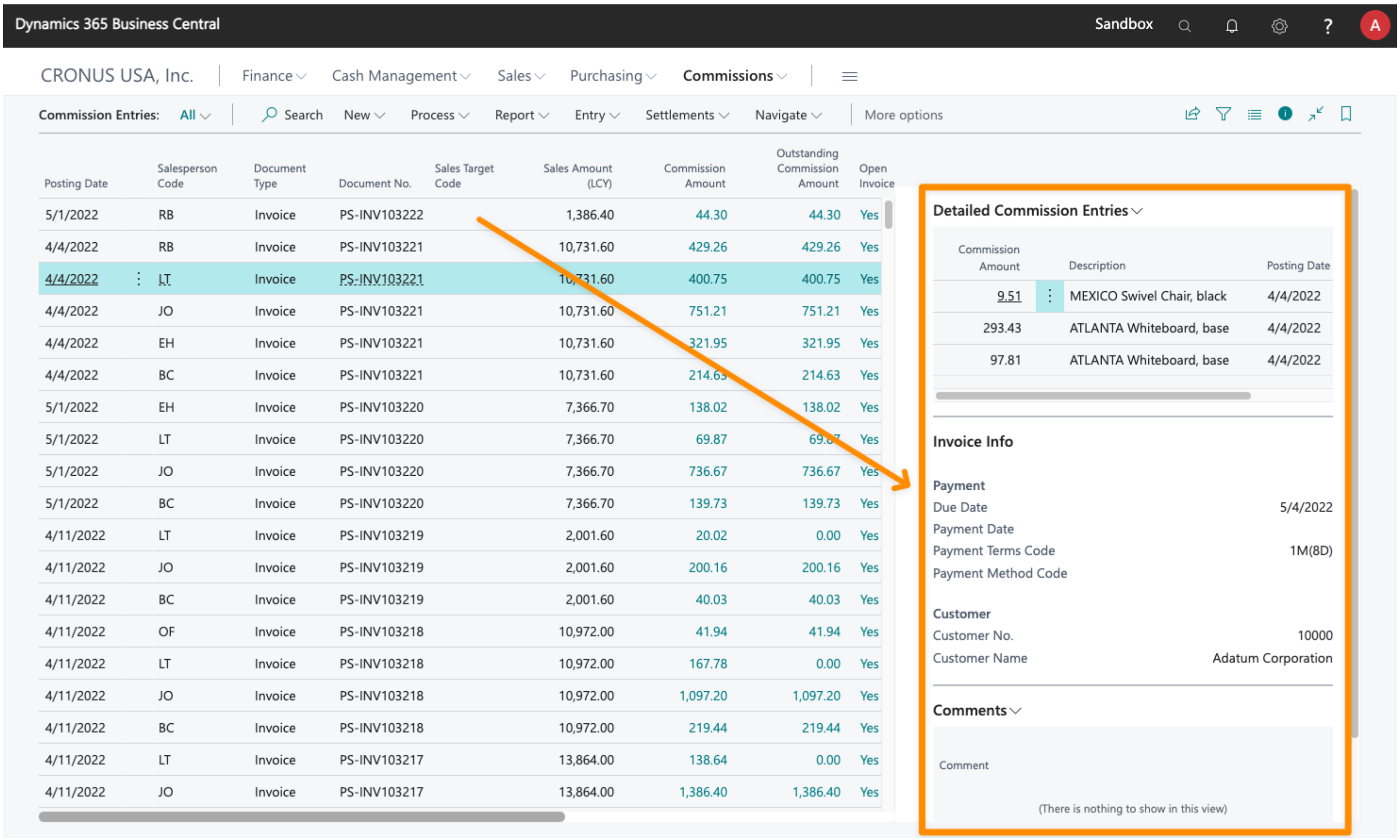
#### Delete Detailed Commission Entries

This action is only available for entries of type *Adjustment*, as long as the commission entry is not currently assigned to a settlement or purchase document. If you want to cancel the amounts in any other detailed commission entry, please create a new detailed entry and specify a reason.

# FactBoxes

## Description

From the list of the commission entries, you have access to three FactBoxes that will show you detailed information on the commission amounts, the payment status of the source invoice (if there is one) and any existing comments related to the entry.



## Detailed Commission Entries

Shows the amounts and description of the detailed commission entries for the commission, including the amount obtained from each sales line in the source sales document, as well as any adjustments, penalties, or settlements applied to it.

## Invoice Info

This factbox will only appear when the commission entry was generated for a sales invoice and shows information related to the payment status of the source invoice.

## Comments

Shows any comment assigned to the commission entry. You can learn more about adding comments to a commission entry in the actions section.

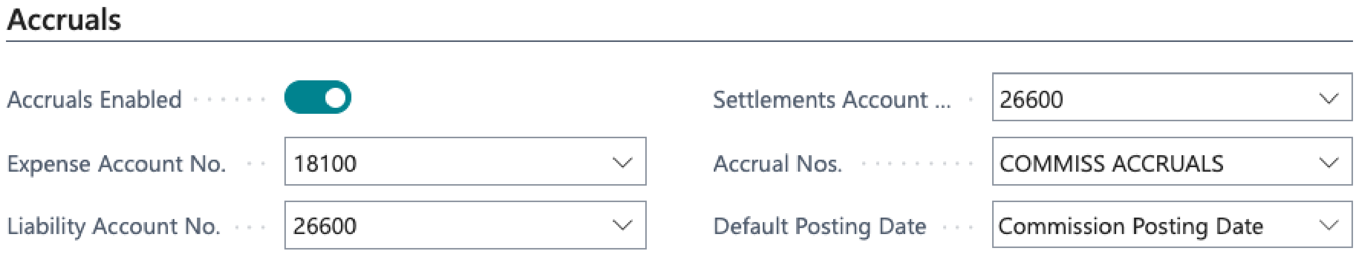
# Commission Accruals

## Details

iDynamics Commissions let you specify an expense account and a liability account that can be used to accrue commissions when these are generated, before the actual commissions are settled.

## Enable Accruals

For accruals to be used, the first step is to open the general setup page, and assign these accounts to the *Accruals* tab.




You will also need to assign a series number for the G/L journal postings that the app will perform internally when accruing commissions. The available fields are:

- *Accruals Enabled*. After you've setup the different account numbers, check this so that the app accrues commissions automatically each time that commissions are generated (if you don't activate this option, you'll be able to post the accruals manually).
- *Expense Account No*. This is the account that will be debited when an accrual is posted.
- *Liability Account No*. This is the account that will be credited when an accrual is posted.
- *Settlement Account No.*. If you specify a different account from the liability account, when you pay commissions using settlement documents this account will be credited when the settlement document is posted (the liability account will be debited). If you pay commissions using purchase invoices, the G/L account assigned to the salesperson in their card (configured for the assigned *Posting Group*) will be used instead.
- *Accrual Nos*. This is the series number that will be used to post accruals. One will be automatically configured when you install the app, but you can change it if you would prefer a different series.
- *Default Posting Date*. If accruals are posted at a different date from the one that the invoices were posted in (e.g. if you recalculate commissions), you can choose whether the app should post those accruals on the posting date of the commission, or on the current date.

Once this info has been setup, you can enable accruals to show all available options int he Commission Entries list.

Scenarios

Depending on how they are configured, there are two main scenarios supported by the app:

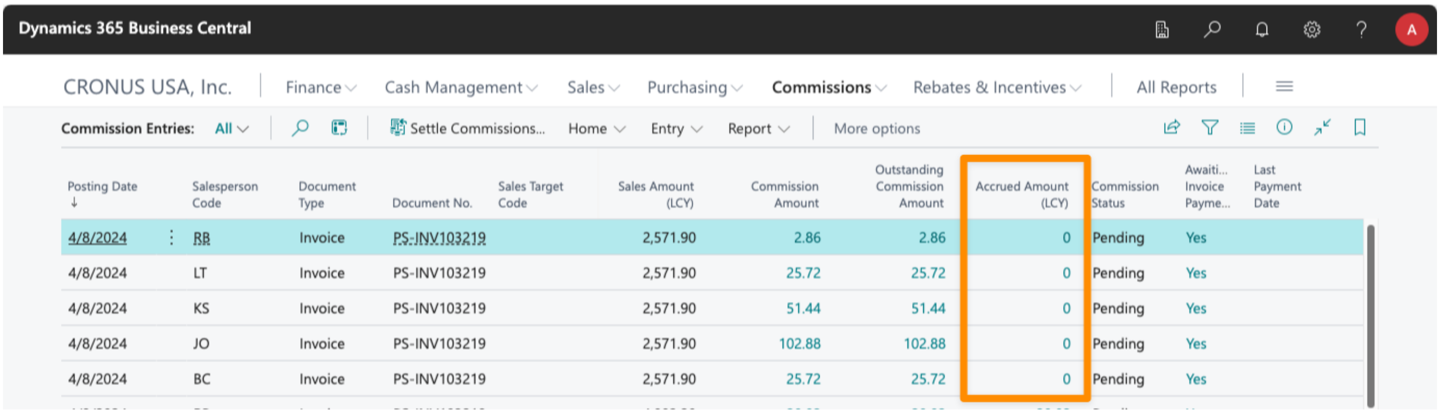
1. Commissions are accrued from an expense account into a liability account, when they are generated, and they will be paid from the liability account.
2. Commissions are accrued from an expense account into a liability account, and then they will either be returned to the expense account or moved to a different account, from which they will be paid.

The main difference between the first and the second is that, in the first scenario, the *Liability Account No.*, the *Settlement Account No.*, and the posting setup account, will point to the same account number.

In the second, settlements and/or posting groups for purchase invoices will use a different account, to which the accrued amount will be credited when a settlement document/purchase invoice is posted.

# Manual Accruals

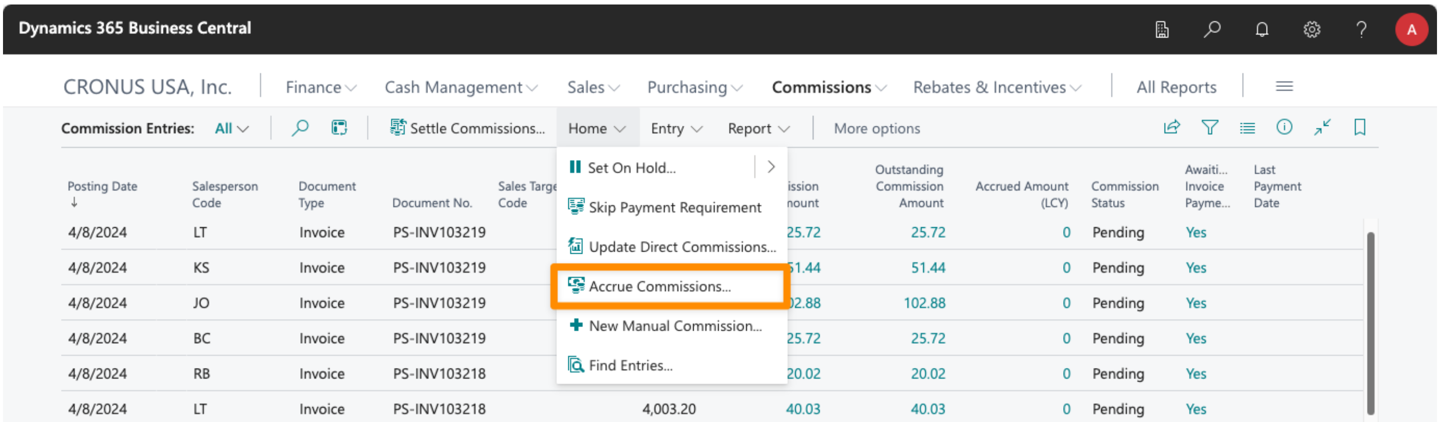
Once you go back to the list of commission entries (you might need to navigate to a different page and go back to the list if it was already open), after enabling accruals, you will see a new column called *Accrued Amount (LCY)*. This shows the amount accrued for each commission entry and, after you enable accruals, it will be zero for all entries.



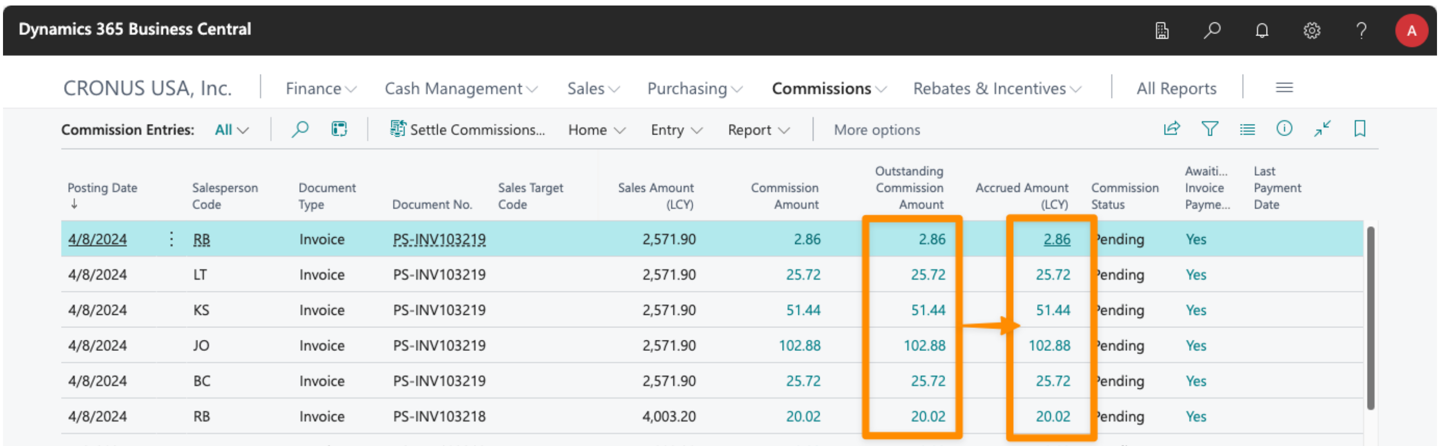
**NOTE**

Once accruals are enabled, they will be updated automatically every time that commissions are generated. It might be possible that, if someone posted an invoice after you enabled the option and navigated to the *Commission Entries* list, the accruals have already been posted.

In the action bar, under the *Home* menu, you will find the *Accrue Commissions...* action. If you run it, the app will ask you whether you want so specify any filters (you can leave all filters blank). Once you click *OK* the process will run, and you will see how the *Accrued Amount (LCY)* column for each entry matches the *Outstanding Amount* column.



Further more, if you click on the *Accrued Amount (LCY)* column, you will see a summary of all accrued amounts for the commission entry.



# Adjustment Journal

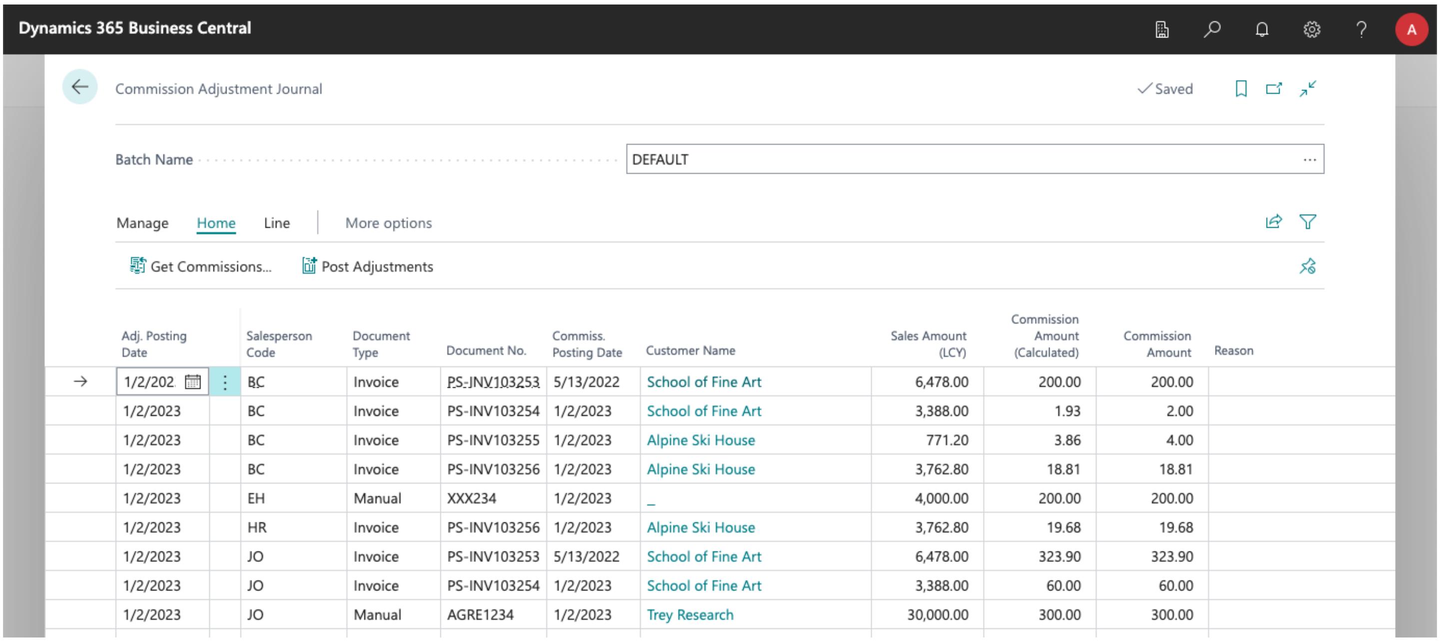
## Description

The commission adjustment journal lets you review all of the generated commissions, and make quick changes to the amounts. Internally, the journal will just create new detailed commission entries with the adjustment amounts, if needed, or run the cancel action, if the commission is set to zero.

In this video we show you how to use the adjustment journal:

## Get Commissions

The first step to do, in order to use the adjustment journal, is to *Get Commissions...* to adjust, using the action available in the *Home* menu. This will bring to the journal every commission entry that matches the specified filters.




## Review the Commission Amounts

Once commission entries have been added to the journal, you can quickly edit the *Commission Amount* field, in any of them, to change the final commission that will be given to the salesperson.

Note that a Reason must be entered if the amount is changed. If you don't want to enter a reason text for each line, the *Post Adjustments* action will ask for a Reason text that will be automatically applied to all lines that have modified amounts, and no *reason* specified.

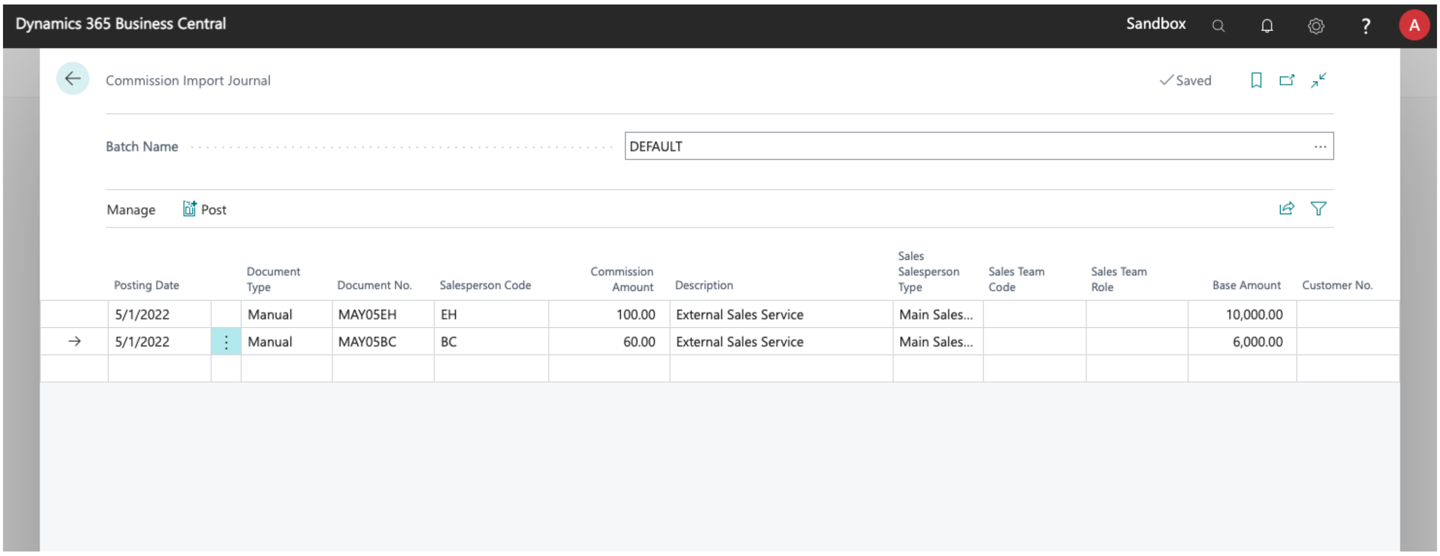
## Post the Journal

When all of the commission amounts have been reviewed, use the *Post Adjustments* action to confirm the new amounts. Detailed commission entries with the adjustments will be created in those cases that are needed, and the journal lines will be deleted so that you can start again.

# Import Commission Journal

## Description

For customers that generate commissions in an external app, the import journal lets you bring them into Business Central, so that you can handle them with iDynamics Commissions, and get reports on them.




## Enter Data Into the Journal

You can manually enter the data, or use the Edit in Excel or RapidStart Business Central features in order to enter the data into the journal.

By default, the fields visible in the journal are:

- **Posting Date**. Specifies the date on which the commission was generated.
- **Document Type**. Currently, the import journal only lets you create manual commission entries, so the *Manual* value is fixed.
- **Document No.** A reference that identifies the source of the commission. The same number can be assigned to several salespeople, but only once to each one.
- **Salesperson Code**. The salesperson that receives the commission.
- **Commission Amount**. The commission received by the salesperson.
- **Description**. A brief description of the reason why the commission has been given/manually imported. If blank, when the journal is posted the user will be asked for a general description for all of the lines where this field is empty.

In addition to the previous fields, which are required, the following optional values can be entered, and will be used for reports:

- **Sales Salesperson Type**. Whether the commission was given to the main salesperson, a manager, or a team role.
- **Sales Team Code**. The sales team that got the commission.
- **Sales Team Role**. If you have specified that the commission was given to a specific team role (*Commission Type*), the role.
- **Base Amount**. The base sales amount on which the commission was achieved.
- **Customer No.**. A customer no. related to the source of the commission.

## Post the Journal

Once all of the data to import has been entered, the *Post* action will generate a Manual Commission Entry for each journal line and delete all the lines, so that you can start again.

# Commission Settlements

## Description

Once commissions have been generated, the next step is to settle them, paying the commissions to each salesperson. iDynamics Commissions lets you settle commissions using either purchase documents or internal settlement documents.

Regardless of the document you use to settle them, posted settlement documents will be created to keep track of everything that was settled, and when.

> **NOTE**
>
> Even though commission entries, for a sales invoice, are always generated when the document is posted, the app lets you **configure** whether these commissions can be settled at that moment, or **only after the payment from the customer has been received**.

## Settlement Documents

For employees that will be paid using your internal payroll software, settlement documents let you decide which commissions should be settled, calculate the total amount, and export it to other apps.

Learn more about settlement documents

## Purchase Invoices

For external employees, or employees whose commissions will be paid through purchase invoices (or credit memos), the app lets you easily add outstanding commissions to these documents.

Learn how to settle commissions using purchase documents

## Automatically Create Settlement Documents

While commissions can be settled individually, most probably you will prefer to run a process that checks every pending commission and automatically creates settlement documents for them.

Learn how to create settlement documents for all outstanding commissions

## Posted Settlements

Regardless of the document you use to settle them, posted settlement documents will be created in order to keep track of everything that was settled, and when.

Learn more about posted settlement documents

## Commission & Settlement Currency

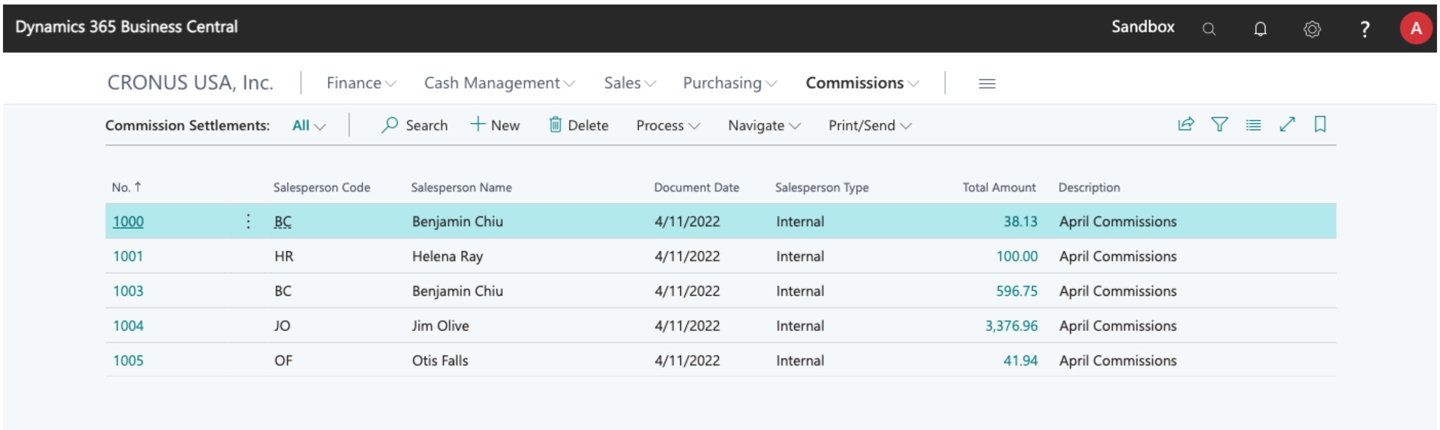
If you have salespeople in different countries, you can specify the currency in which you want to pay them commissions. That way, they will be paid commissions in the same currency in which they are selling your items or services, if it's different from your local currency.

Learn how to change the currency used to settle commissions

# Commission Settlement Documents

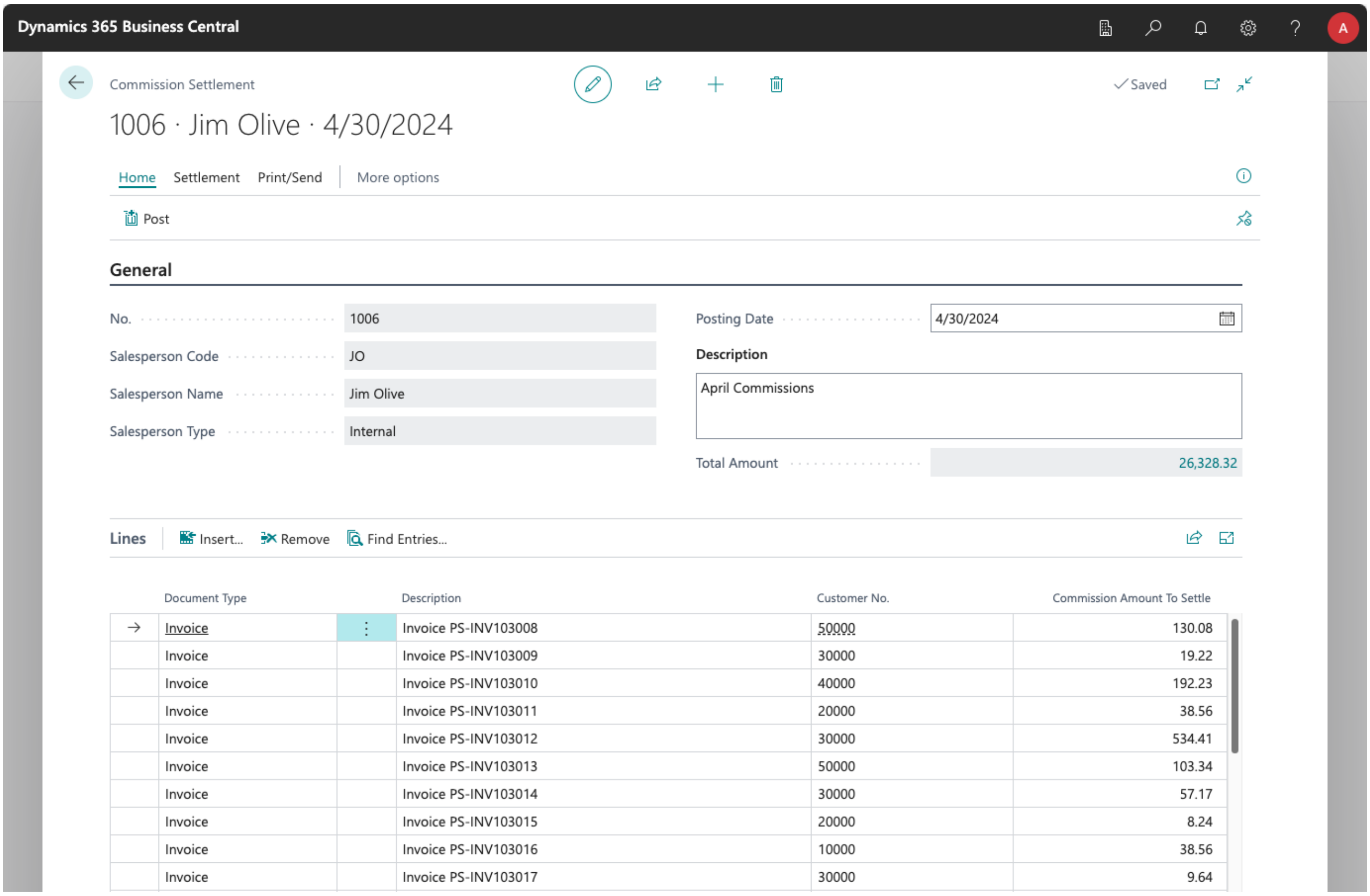
## Description

You can access settlement documents from the *Commissions* menu or by searching for *Commission Settlements* in Business Central.




## Create a Settlement and Assign Commissions

These documents can be created automatically at the end of a period, or manually. However they are created, you can add commissions to them at any time, using the *Insert...* action, within the *Manage* menu, in the action bar for the document lines. Amounts can also be edited (to lower the amount and give a partial payment), and lines can be removed if a commission should not yet be settled.




**NOTE**

The *Insert...* action will only show those entries that belong to the salesperson assigned to the document, that are not assigned to any other settlement or purchase document, and that have an outstanding amount. Furthermore, if it has been configured that commissions should only be settled after customer payment has been received, commissions for unpaid invoices will not be shown.

## Send by Email

Once the documents have been created, and before posting, the *Print/Send* menu, in the action bar, lets you print the documents or send them by email.

The *Send by Email* option will let you specify which documents you want to send and, if each salesperson has a correct email address specified in their card, send each settlement document, individually, to the assigned salesperson.

## Posting

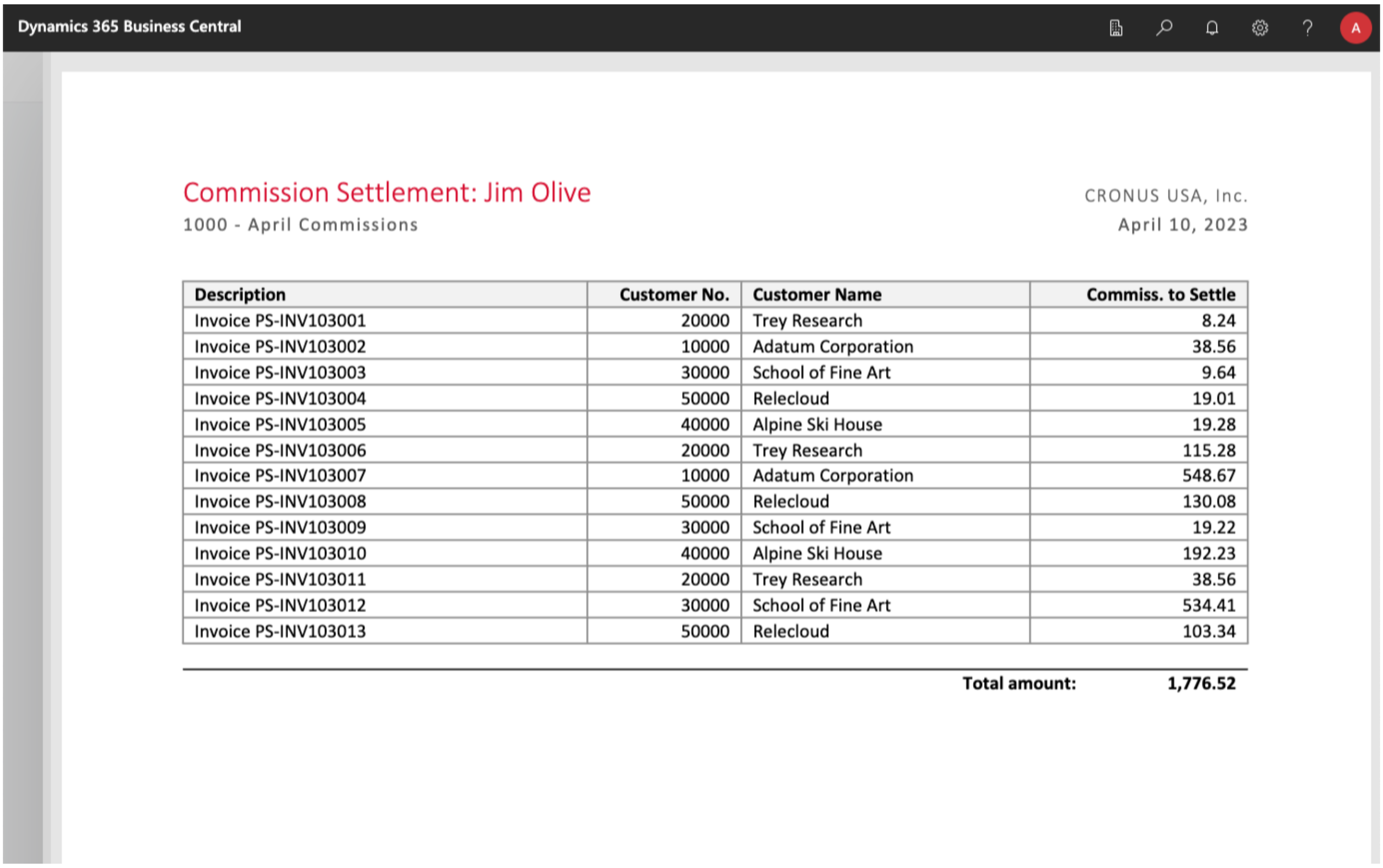
Once commissions have been added to the documents, and the amounts have been reviewed, settlement documents can be posted using the *Home* > *Post* action, available for each document, or the *Home* > *Post selected documents* action, which lets you post multiple settlement documents at once.

Posting the documents will move them to the list of posted documents, and will settle the included commissions (or partially settle, if only part of the outstanding amount was given to the salesperson), creating detailed commission entries for each one of them.

This document won't generate any G/L, customer or vendor ledger entries when posted. Commissions are usually paid to employees through whichever application is being used by the company to handle their payroll. As there are no payroll features available within Business Central, we have opted to give you the tools to get this information in a way that lets you export it to whichever app is effectively used, in addition to including customization events to let you integrate these documents with any other functionality that you might have installed in Business Central.

## Printing

Settlement documents can be printed, saved as PDFs, and sent by email. You can even email them in bulk so that each salesperson can review all of the commissions that are going to be settled.




Commission Settlement: Jim Olive
1000 - April Commissions

CRONUS USA, Inc.
April 10, 2023

| Description | Customer No. | Customer Name | Commiss. to Settle |
|---|---|---|---|
| Invoice PS-INV103001 | 20000 | Trey Research | 8.24 |
| Invoice PS-INV103002 | 10000 | Adatum Corporation | 38.56 |
| Invoice PS-INV103003 | 30000 | School of Fine Art | 9.64 |
| Invoice PS-INV103004 | 50000 | Relecloud | 19.01 |
| Invoice PS-INV103005 | 40000 | Alpine Ski House | 19.28 |
| Invoice PS-INV103006 | 20000 | Trey Research | 115.28 |
| Invoice PS-INV103007 | 10000 | Adatum Corporation | 548.67 |
| Invoice PS-INV103008 | 50000 | Relecloud | 130.08 |
| Invoice PS-INV103009 | 30000 | School of Fine Art | 19.22 |
| Invoice PS-INV103010 | 40000 | Alpine Ski House | 192.23 |
| Invoice PS-INV103011 | 20000 | Trey Research | 38.56 |
| Invoice PS-INV103012 | 30000 | School of Fine Art | 534.41 |
| Invoice PS-INV103013 | 50000 | Relecloud | 103.34 |

**Total amount:** **1,776.52**

## Number Series

Within the general setup card, you will find a Settlements Section where you can specify the number series that should be used for these documents.

# Purchase Invoices

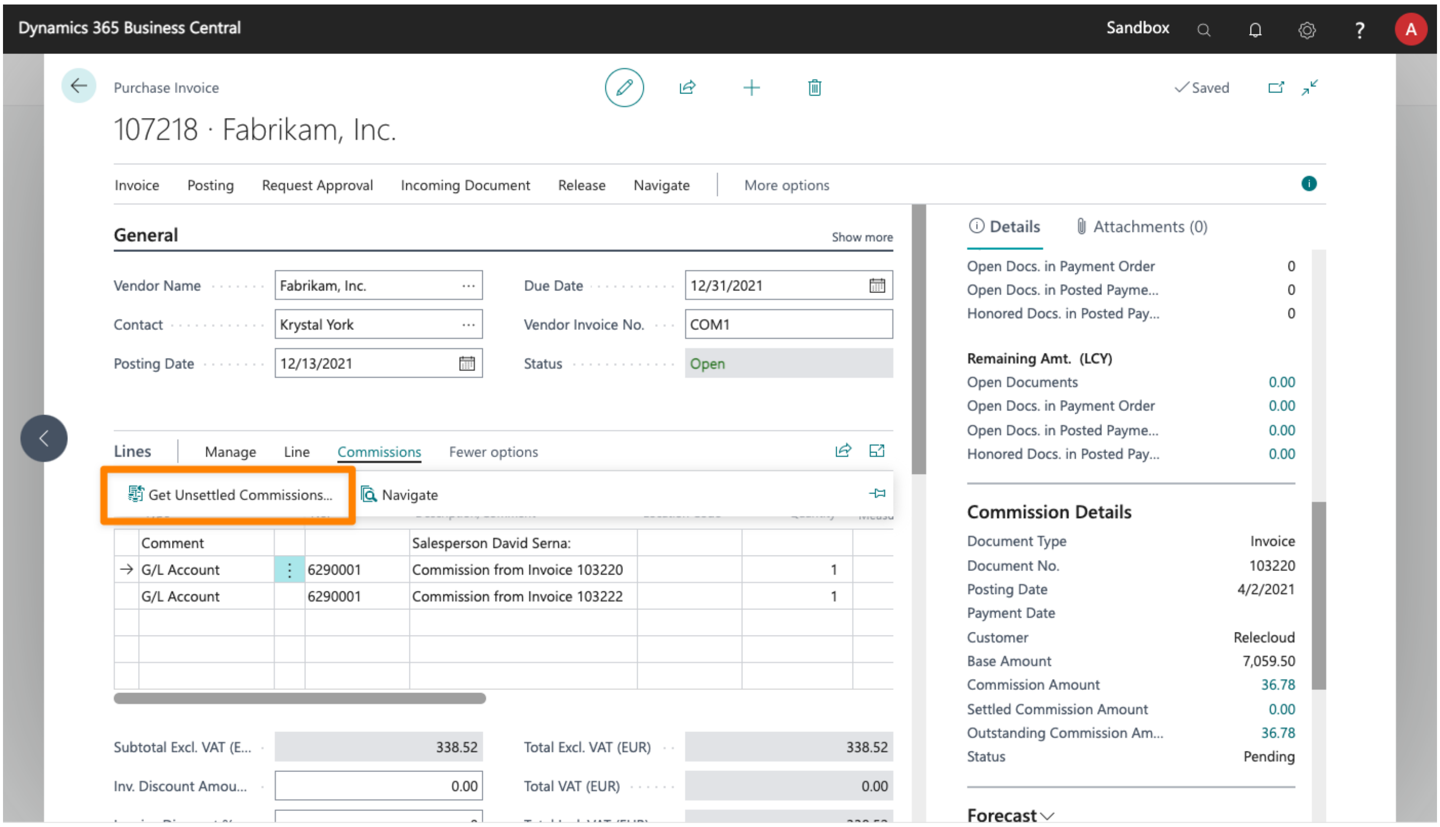
## Description

For external salespeople, the app lets you settle commissions through purchase invoices and credit memos. Invoices can be generated automatically just like settlement documents, as long as the salesperson has a related vendor number and a posting group has been assigned.

> **NOTE**
>
> You can configure a custom series number for purchase documents that settle commissions, if you want to use a different series for regular purchase invoices and purchase invoices that pay commissions.

## Add Commissions to a Purchase Document

In addition to this automated process, you can add commissions to any invoice (or credit memo) using the *Get Unsettled Commissions...* action, available in the toolbar located above the line list of the document.




Only commissions for the salespeople that have the invoice vendor assigned will be shown in the list, that are not assigned to any other settlement or purchase document, and that have an outstanding amount. Furthermore, if it has been configured that commissions should only be settled after customer payment has been received, commissions for unpaid invoices will not be shown.

If the selected invoice line corresponds to a commission entry, the Commission Details factbox will show extra information about the source commission.

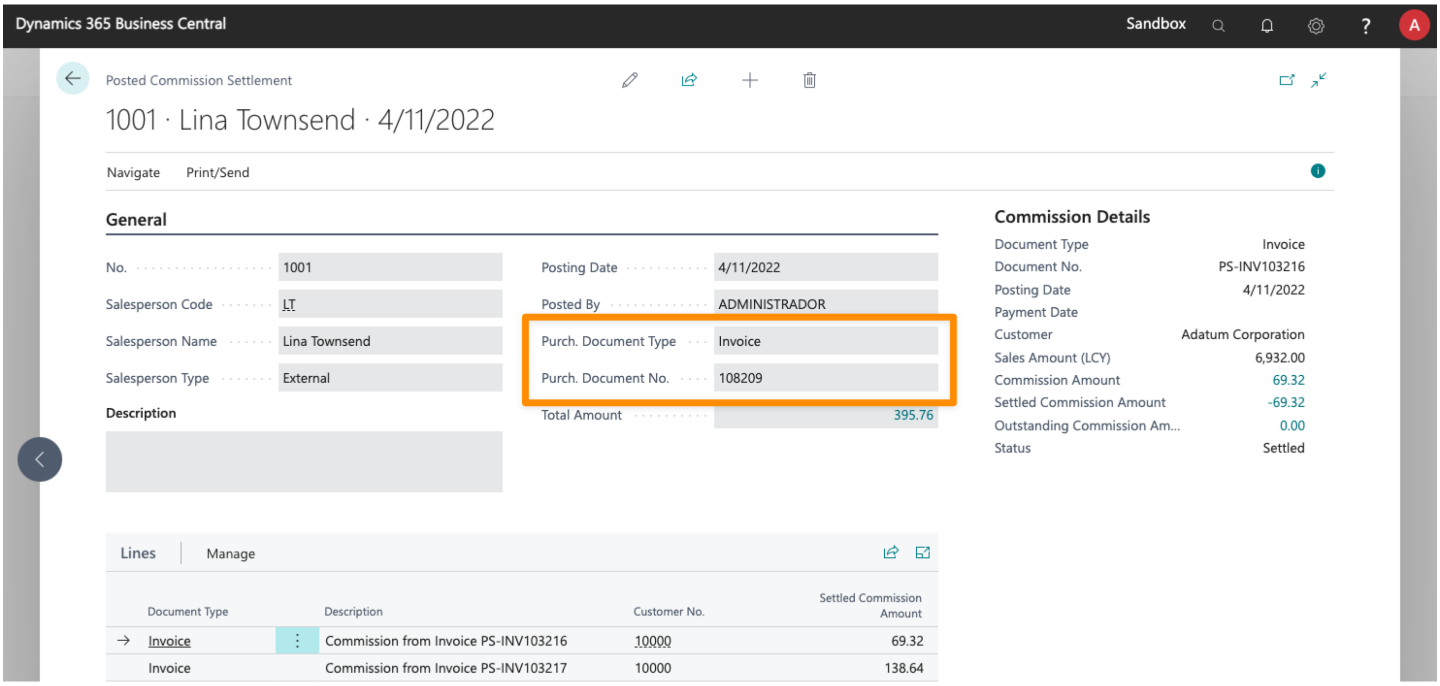
Just like in settlement documents, the commission amount is editable, but the amount must always be equal or lower than the outstanding commission amount.

Purchase lines related to a commission can also be deleted after being assigned to the document, leaving the commission for a later settlement.

## Posting

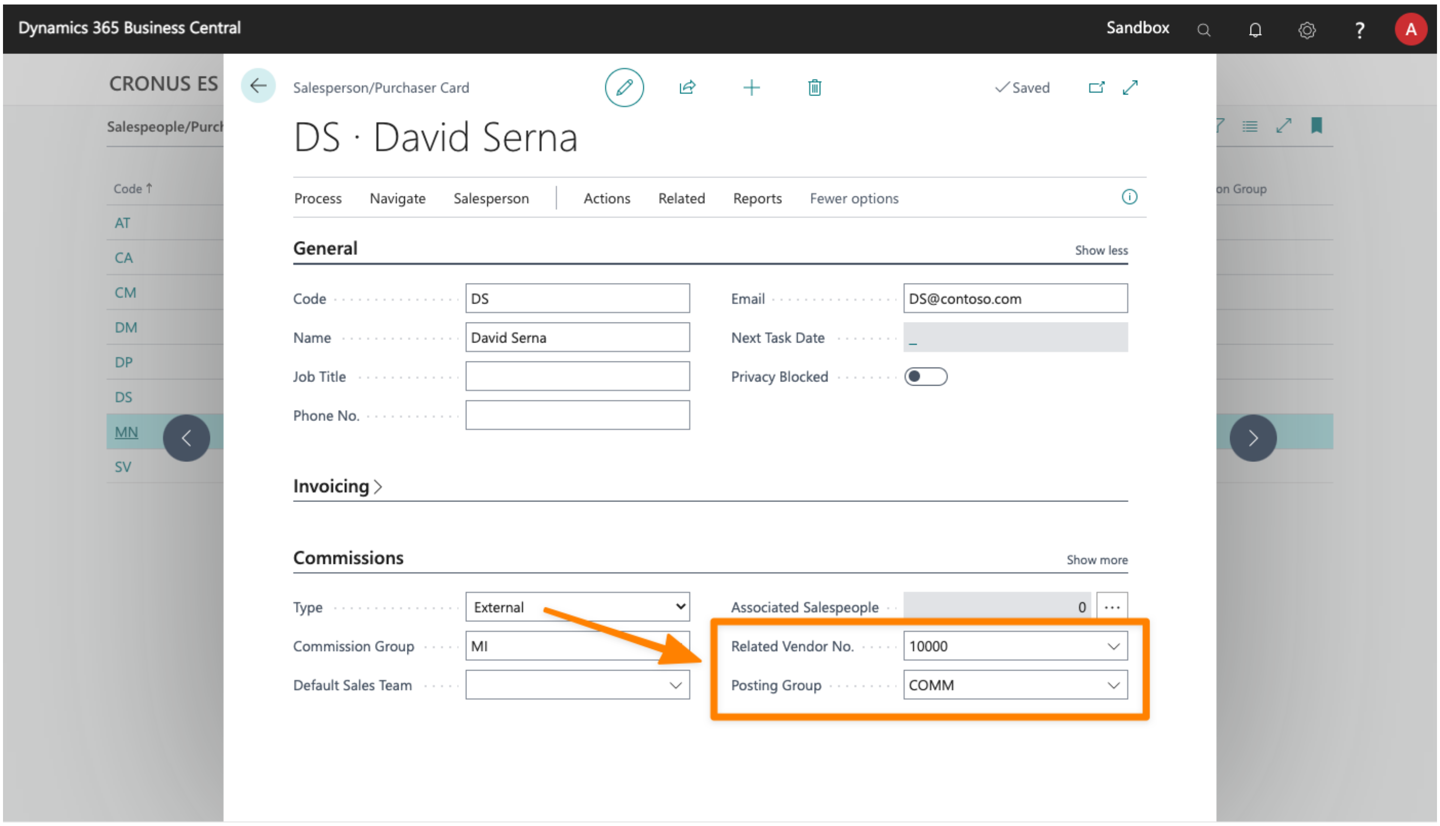
After commissions have been added to the purchase documents, and the amounts have been reviewed, the document can be posted just as any other purchase invoice/credit memo.

Once posted, the app will create a posted settlement document for each salesperson for which commissions were settled, with the detailed amounts. In addition to that, detailed commission entries will be created for each settled commission, with the settled amounts.



## Configure Salesperson Vendor

To be able to add commissions to a purchase document, the salesperson needs to be marked as *external*, and have an assigned vendor, that will be used for the invoices.

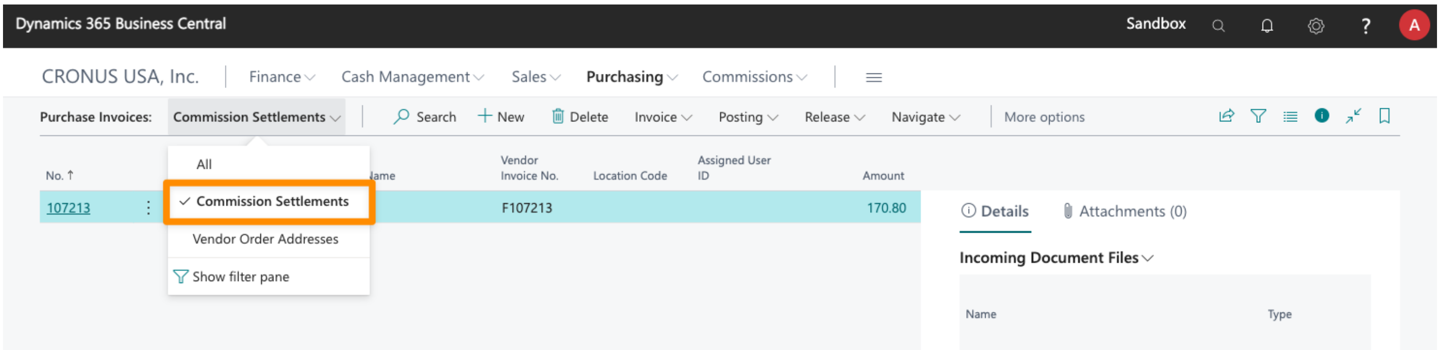


In addition to the vendor, you must also specify the posting group that will be used when creating the lines.

> **NOTE**
>
> The same vendor can be assigned to multiple salespeople. If that is the case, a single invoice will be generated, for all salespeople, when the purchase documents are generated at the end of the month/period.

## Filter Purchase Invoices

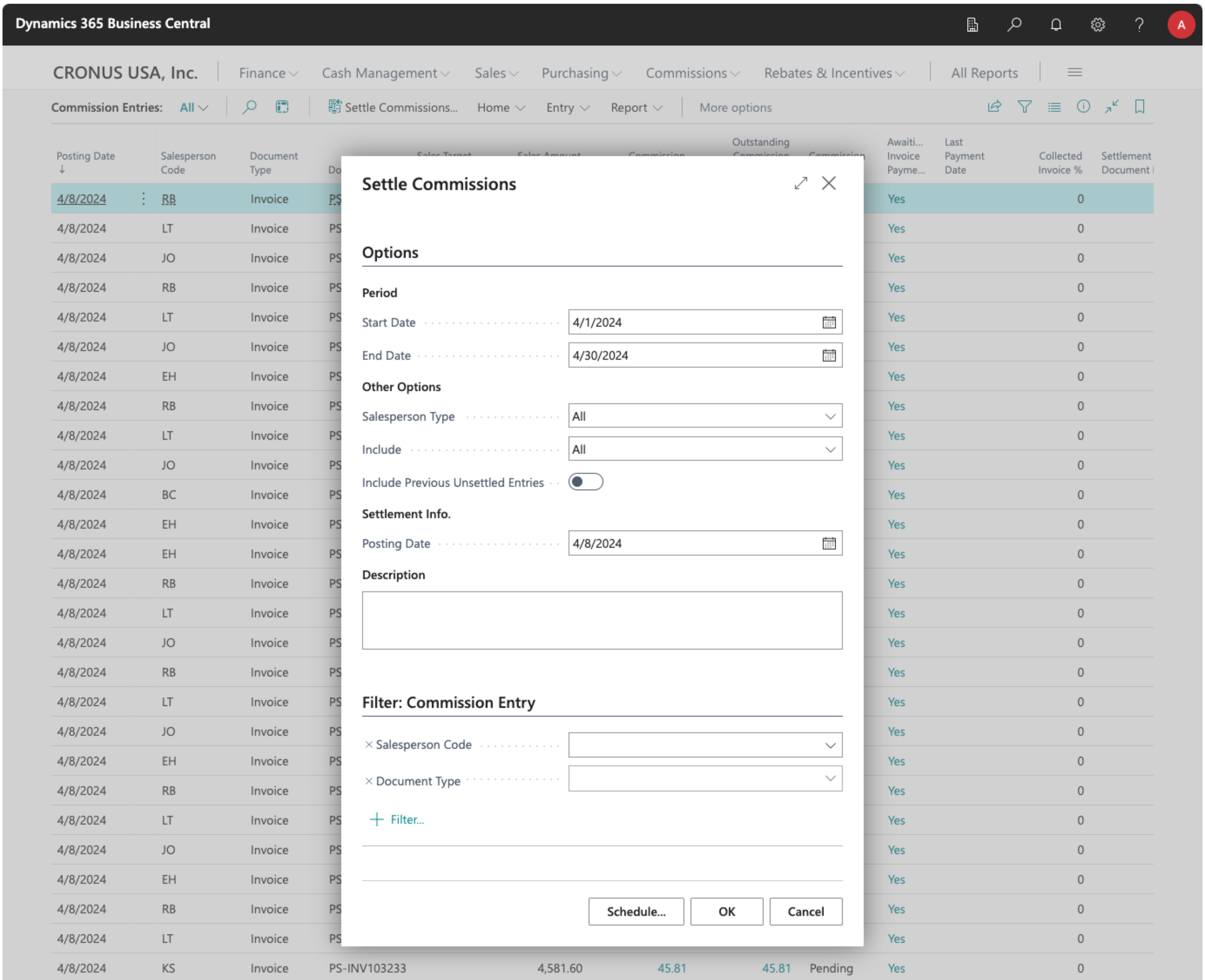
If at any moment you want to filter purchase invoices by those that are going to settle commissions, you can filter by the boolean field *Settles Commissions*. The app automatically adds a default filter to the purchase invoice list, that you can use to do so.



# Generate Settlement Documents

## Description

Even though settlement documents can be created manually, as well as purchase invoices that settle commissions, the easiest way to generate them is through the *Settle Commissions...* action, available both in the *Home* menu of the *Salespeople/Purchasers* and *Settlement Documents* lists and on the action bar of the *Commission Settlements* list.




This action will generate settlement documents or purchase invoices (depending on how the salesperson has been configured) for all salespeople who have commissions in the specified date period.

The *Description* field is optional and lets you specify which commissions are being settled (e.g. "January Commissions"). This text will be added to the settlement headers and will be included as comments in any purchase document generated in the process.

## Date Period

It is important to highlight that, for commissions obtained from sales invoices, the included commissions will vary depending on whether commissions have been set up to be paid on post, or only after the invoice has been paid by the customer.

If commissions will be paid on posting, all commission entries posted within the specified dates will be included.

If, for sales invoices, commissions will be paid only after the invoice has been collected, commissions *collected* (with a payment date) within the specified dates will be included instead (for other types of commissions, they will be included if they were posted within these dates).

In any case, the option *Include Previous Unsettled Entries* will tell the process to ignore the start date and include all unsettled commission entries posted or collected before/on the *End Date*.

## Generated Documents

This process will create settlement documents or purchase invoices, depending on how each salesperson has been configured.

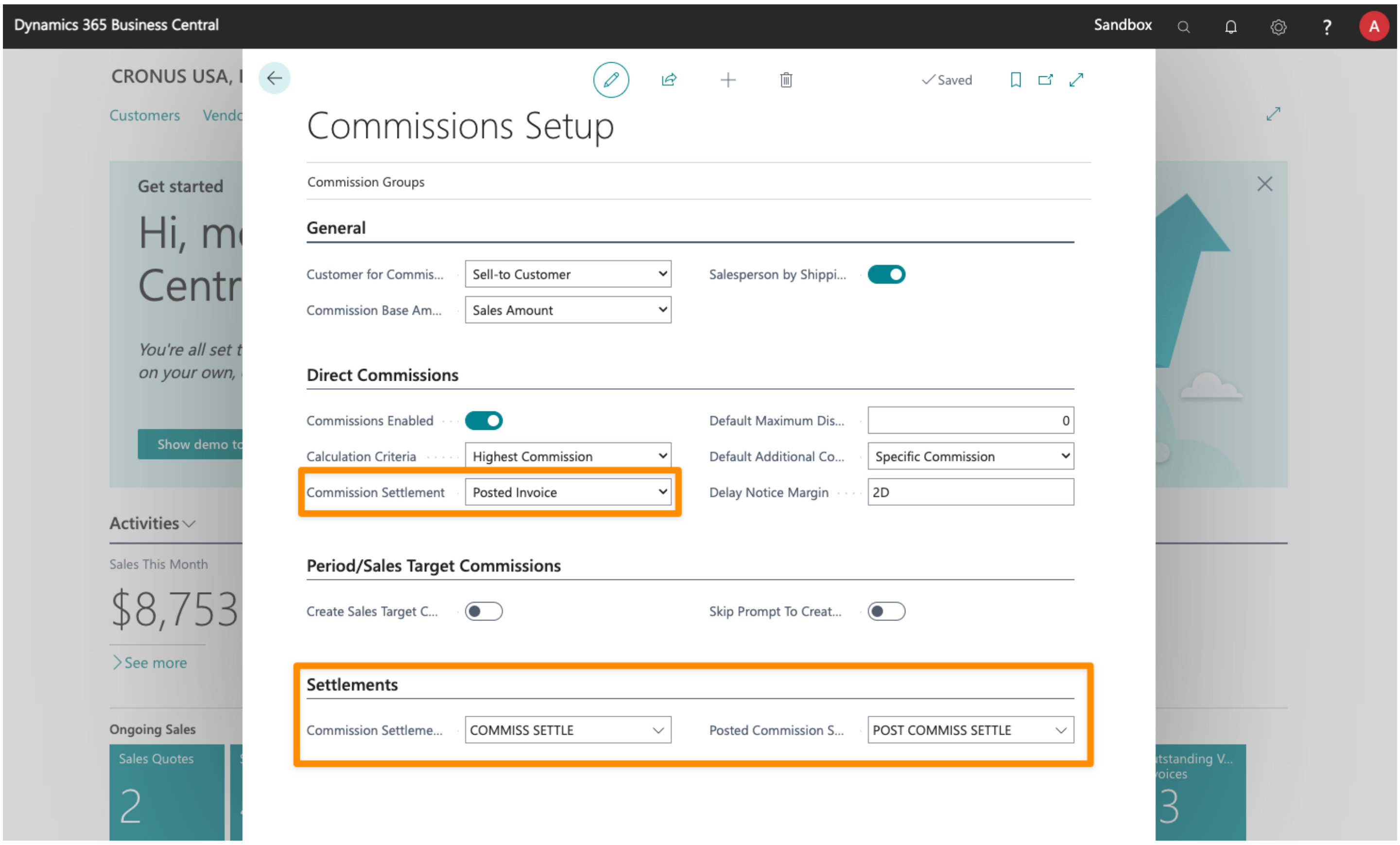
If you are going to use purchase documents to settle commissions, the app will always create a purchase invoice, with all of the outstanding commissions (both positive and negative), unless, for some reason, the total commission amount for the selected period is negative, in which case a purchase credit memo will be created instead.

At the end of the process, one or more notifications will be shown, allowing you to navigate to the different documents created.

Furthermore, if you have run the action from the *Commission Entries* list, you will see that the *Settlement Document No.* column now contains the document to which each entry has been assigned.

## General Setup

Before you can settle commissions, you must configure whether commissions should be paid/settled when the original sales document is posted or collected. In addition, serial numbers must be configured for the settlement documents.




### Commission Settlement

The *Commission Settlement* option of the setup page lets us select the moment in which a direct commission can be paid to the salesperson. *Posted Invoice* means that commissions can be settled once the sales invoice has been posted. *Payment Collected*, however, will block its payment until the customer has fully paid the customer ledger entries generated by the invoice.

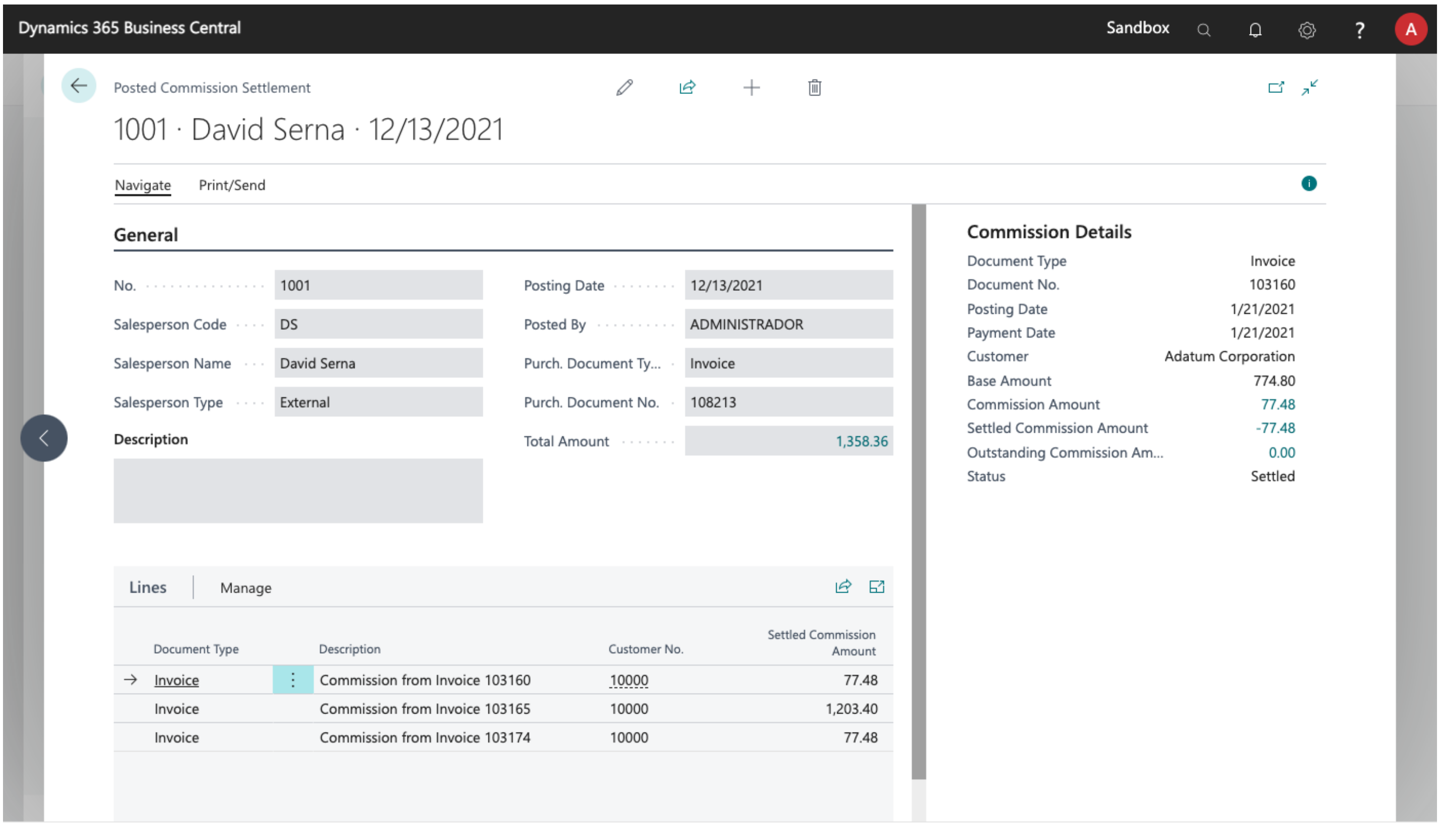
### Number Series

When installed, iDynamics Commissions will automatically create a number series for settlement documents and posted settlement documents. If you prefer to assign a custom series to these documents, here you can change the series assigned to each one.

# Posted Settlement Commissions

## Description

Regardless of the document you use to settle them, posted settlement documents will be created in order to keep track of everything that was settled, and when.

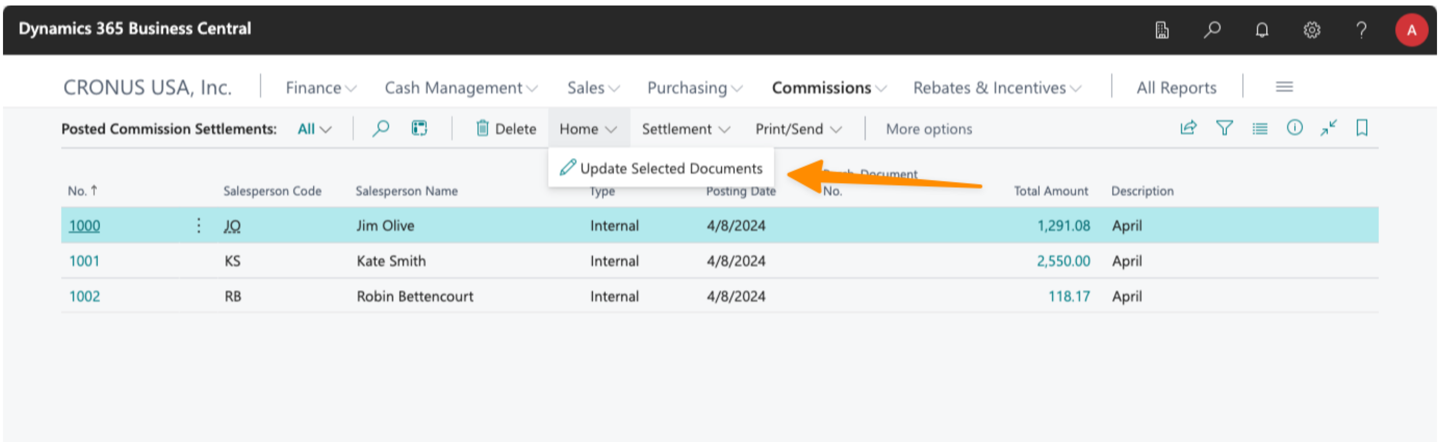



From this archive, you can print and email the document, if needed, as well as check the purchase invoice/credit memo where the amounts were settled.

As multiple salespeople can have the same vendor and be settled through a single purchase invoice, multiple posted settlement documents can be generated when a purchase invoice is posted.

## Update Description or Posting Date

Once settlement documents have been posted, their description and posting date can still be changed, using the action *Home > Update Settlement Documents...* available in the list of posted settlement documents.

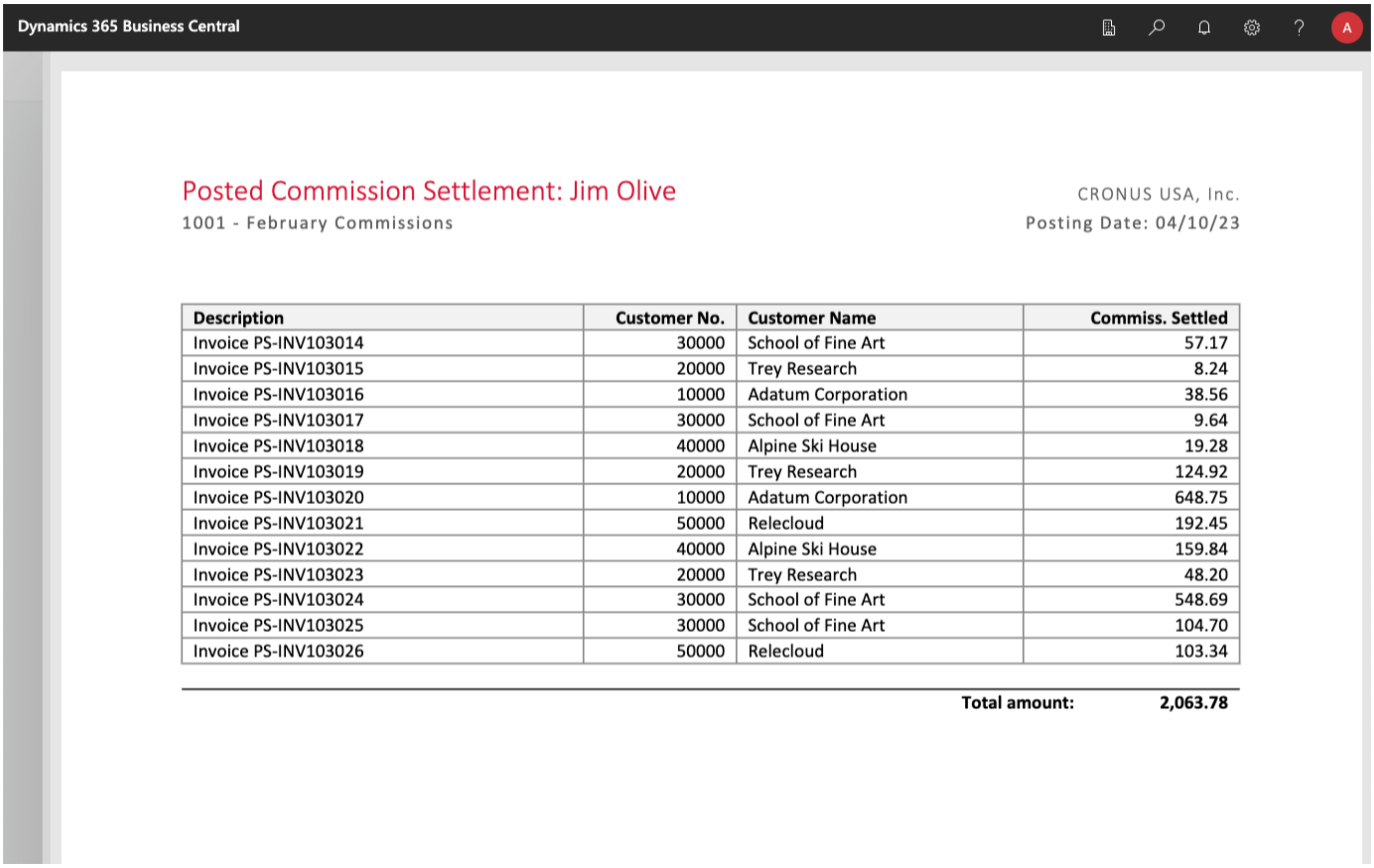



**NOTE**

Posted settlements can be generated directly from settlement documents, or through purchase invoices. For those created from purchase invoices, the date cannot be edited, as it must match the date of the purchase invoice.

# Printing

Just as settlement documents, posted settlement documents can be printed, saved as PDFs, and sent by email.




Posted Commission Settlement: Jim Olive

1001 - February Commissions

CRONUS USA, Inc.

Posting Date: 04/10/23

| Description | Customer No. | Customer Name | Commiss. Settled |
|---|---|---|---|
| Invoice PS-INV103014 | 30000 | School of Fine Art | 57.17 |
| Invoice PS-INV103015 | 20000 | Trey Research | 8.24 |
| Invoice PS-INV103016 | 10000 | Adatum Corporation | 38.56 |
| Invoice PS-INV103017 | 30000 | School of Fine Art | 9.64 |
| Invoice PS-INV103018 | 40000 | Alpine Ski House | 19.28 |
| Invoice PS-INV103019 | 20000 | Trey Research | 124.92 |
| Invoice PS-INV103020 | 10000 | Adatum Corporation | 648.75 |
| Invoice PS-INV103021 | 50000 | Relecloud | 192.45 |
| Invoice PS-INV103022 | 40000 | Alpine Ski House | 159.84 |
| Invoice PS-INV103023 | 20000 | Trey Research | 48.20 |
| Invoice PS-INV103024 | 30000 | School of Fine Art | 548.69 |
| Invoice PS-INV103025 | 30000 | School of Fine Art | 104.70 |
| Invoice PS-INV103026 | 50000 | Relecloud | 103.34 |

**Total amount: 2,063.78**

# Commission & Settlement Currency

## Description

If your company issues invoices in multiple currencies, because you sell items or services to customers in different countries, you can choose how the app will generate commissions for these documents, and the currency that will be used to pay commissions to your salespeople, depending on where each salesperson is located.

By default, the app will generate commissions using the local currency. But if your company is located in the US, and you have a salesperson located in Canada, you can specify that commissions for that salesperson should be calculated in Canadian dollars.

## Salesperson Currency

You can configure the currency that will be used to pay commissions to each salesperson in their card, using the field *Settlement Currency Code*. By default, iDynamics Commissions will calculate and settle commissions using the local currency.

Note that, once you change the currency assigned to a salesperson, you can use the update commissions/stats action, to recalculate existing commissions in the new currency.

## Exchange Rates

Assigning a specific currency to a salesperson will not just affect the amounts shown to them in reports, but also the final amount paid, in local currency, to them.

As an example, let's imagine that your company is in the US, and you have a salesperson in the UK.:

At the beginning of the month, an invoice is posted for a British customer, with a sales amount of £1000, and the salesperson receives a 10% commission. This is a commission of £100, which is $122 at the date the invoice was posted (£1 = $1.22).

If you pay commissions in local currency, you will always pay a commission of $122.

If you pay commissions in pounds to that salesperson, you will pay a commission of £100, and the actual amount in dollars will depend on the exchange rate of the day that the commission is paid.

iDynamics Commissions will keep track of this differences (a detailed commission entry will be generated with the exchange rate difference), so that you can get reports on the amounts won/lost due to the fluctuation of exchange rates.

## Sales Targets

Currently sales targets will always generate commissions in local currency. An update to support setting (and paying) target commissions in different currencies will be available later this year.

# Commission Advances

## Description

Commission advances let you pay commissions before they are actually achieved by the salesperson. These can be one-time advances or regular commission draws.

In this video, we show you how to use the commission advances feature.

## Commission Advance Journal

The commission advance journal lets you specify who will receive the commissions, when, what amount, and when the commission should be returned.

Learn how to create and post commission advances

## Advance Commissions for Sales Documents

If you want to advance commissions for a specific sales order or sales invoice,based on the expected commissions, you can do so from the sales document.

Learn how to preview and advance commissions for a sales document

## Advance Commissions for Projects

If you want to advance commissions for a specific project, before it is invoiced, based on the expected commissions, you can do so from its project card.

Learn how to preview and advance commissions for a project

## Posted Advances

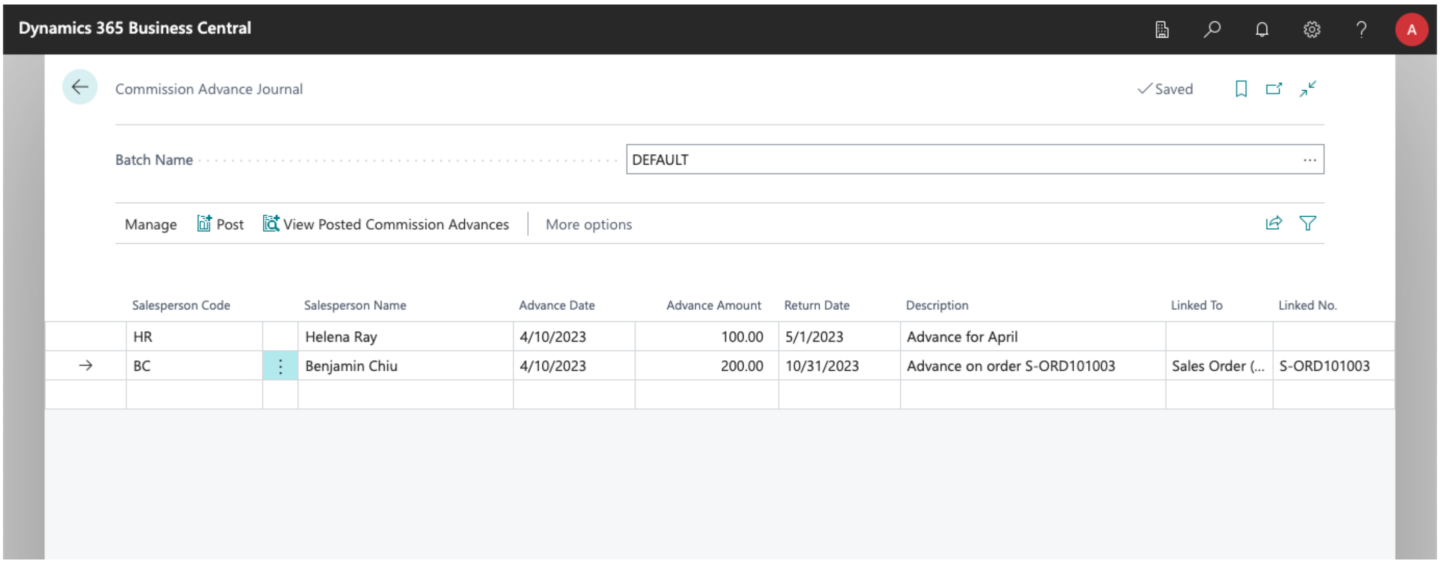
When commission advances are posted, commission entries will be created for both the date on which the advance is going to be paid and the date when it is going to be returned. In addition to that, a *Commission Advance* document will be generated.

Learn more about posted advance documents

# Commission Advance Journal

## Description

The commission advance journal can be accessed from the Commissions menu, or by searching for it in the Business Central *tell me* search box.




In order to advance commissions, just enter the salesperson code to whom the commission should be given, the amount to advance, when it can be paid, and when it should be returned. Additionally, a small description can be added to each advance.

## Posting Advances/Draws

Use the *Post* action, in the action bar, to post the journal entries and generate the corresponding commission advances.

When posted, the journal will create two commission entries for each commission advance: one with the advanced amount, posted on the *Advance Date*, and the other with the negative amount, posted on the *Return Date*. It will also create a commission advance document, that can be used to keep track of all given commission advances (and their payment/return status).

Note that, unlike other commission entries, commission entries for advances can not be edited. If you need to make adjustments to an advance (or even cancel it), you can post a negative amount using this journal, which would generate a negative commission now, and a positive commission on the return date.

## Link Advances to Sales Documents or Projects

You can link a commission advance to a specific sales document (or to a project) by using the *Linked To* and *Linked No.* fields, available in the journal. When you do so, the advance will be linked to the selected document, and it will have to be returned when the sales document is posted or collected (depending on the value selected in the *Linked To* field).

The available options are:

- *Sales Order (Posted)*.
- *Sales Order (Posted and Collected)*.
- *Sales Invoice (Posted)*.
- *Sales Invoice (Posted and Collected)*.
- *Posted Sales Invoice (Collected)*.
- *Project*.

For sales orders and sales invoices, the *Posted* option means that, once the document is posted, the advance will have to be returned (regardless of whether commissions are configured to be settled only after the customer pays the invoice).

*Posted and Collected* means that the app will wait until the posted invoice generated by the document is paid by the customer. Note that, if you do partial postings of the source document, the app will wait for the payment of the first generated invoice.

For posted sales invoices, the app lets you link the advance to its payment. That way the salesperson can receive part of the commissions without waiting for the customer to pay, but the amount advanced will have to be returned when the customer pays and the commissions are released.

Finally, for a project, the advance will be deducted from any commissions posted for a project (when it's invoiced).

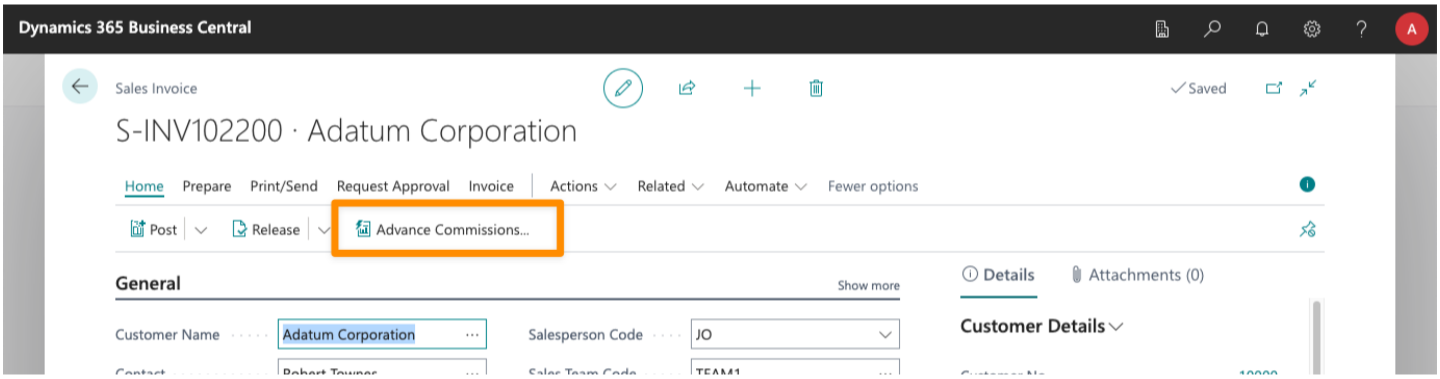
In all of these cases, when you link the commission advance to a document/project, the *Return Date* specified in the journal becomes the maximum return date. If the document/project is not posted or collected before that date, the advance will have to be returned anyway.

> **NOTE**
>
> You can directly link a commission advance to a sales document by using the action available on sales orders and sales invoices. Or to a project, using the action available in the project card.

# Advance Commissions for a Sales Document

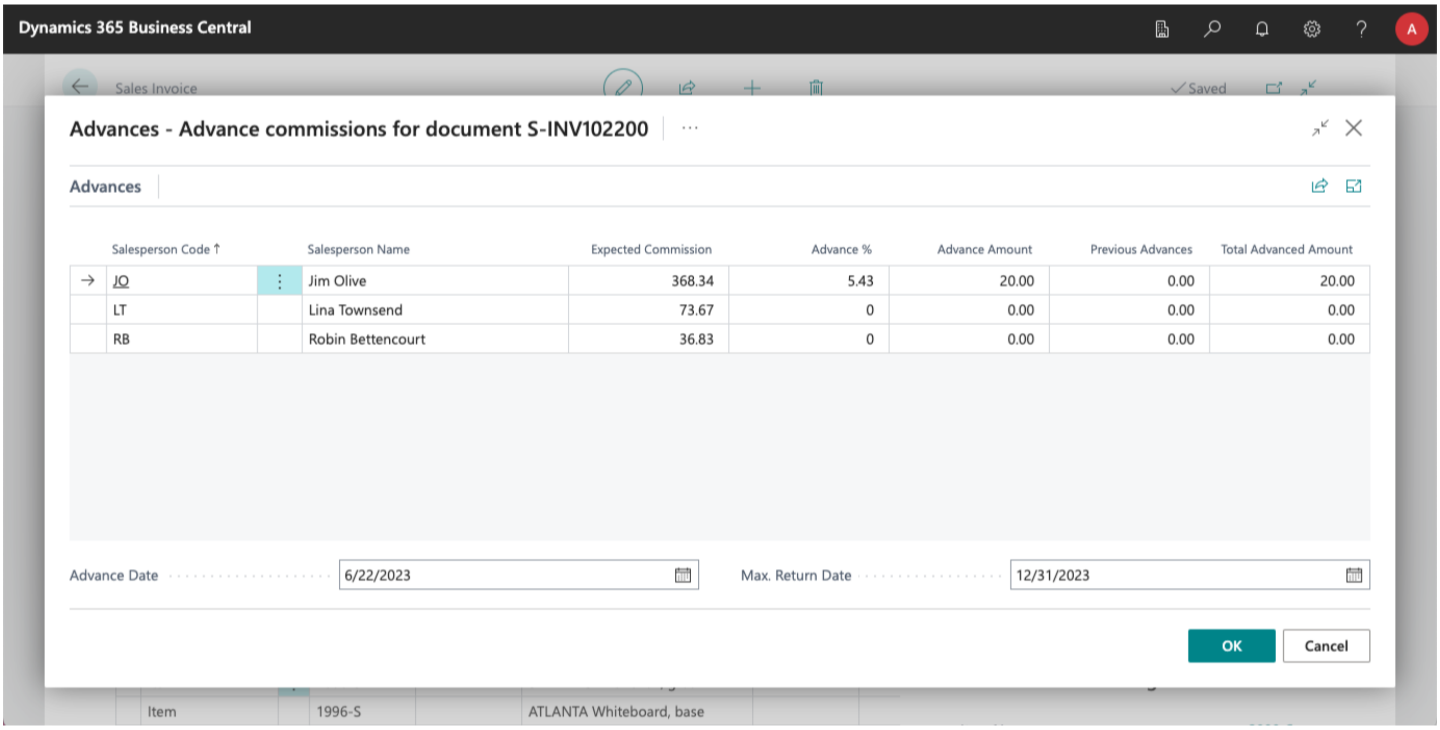
## Description

The *Advance Commissions* action, available in both the Sales orders and Sales invoices lists (and cards), lets you preview the expected commissions for the selected document, and advance part of those commissions to the salespeople assigned to the document.




## Preview and Advance Commissions

When selected, the app will show you a list of all salespeople that are expected to get commissions from the document, as well as the expected amounts.




Here, you can specify the amount to advance by entering a percentage in the *Advance %* column, or a fixed amount in the *Advance Amount* column (when you enter a value in one of these fields, the other will be automatically calculated).

If you have already posted commission advances, the *Previous Advances* column will show this information, and the *Total Advanced Amount* will give you the total amount of the previously advanced amount and any extra amount that you want to advance.

Finally, the *Advance Date* and *Max. Return Date* let you specify the date on which the advances will be made effective, and the maximum date on which they have to be returned. When you confirm the dialog, the advances will be linked to the document, and the advance will have to be returned when the document is posted or collected, depending on when you pay commissions.

# Project Commission Advances

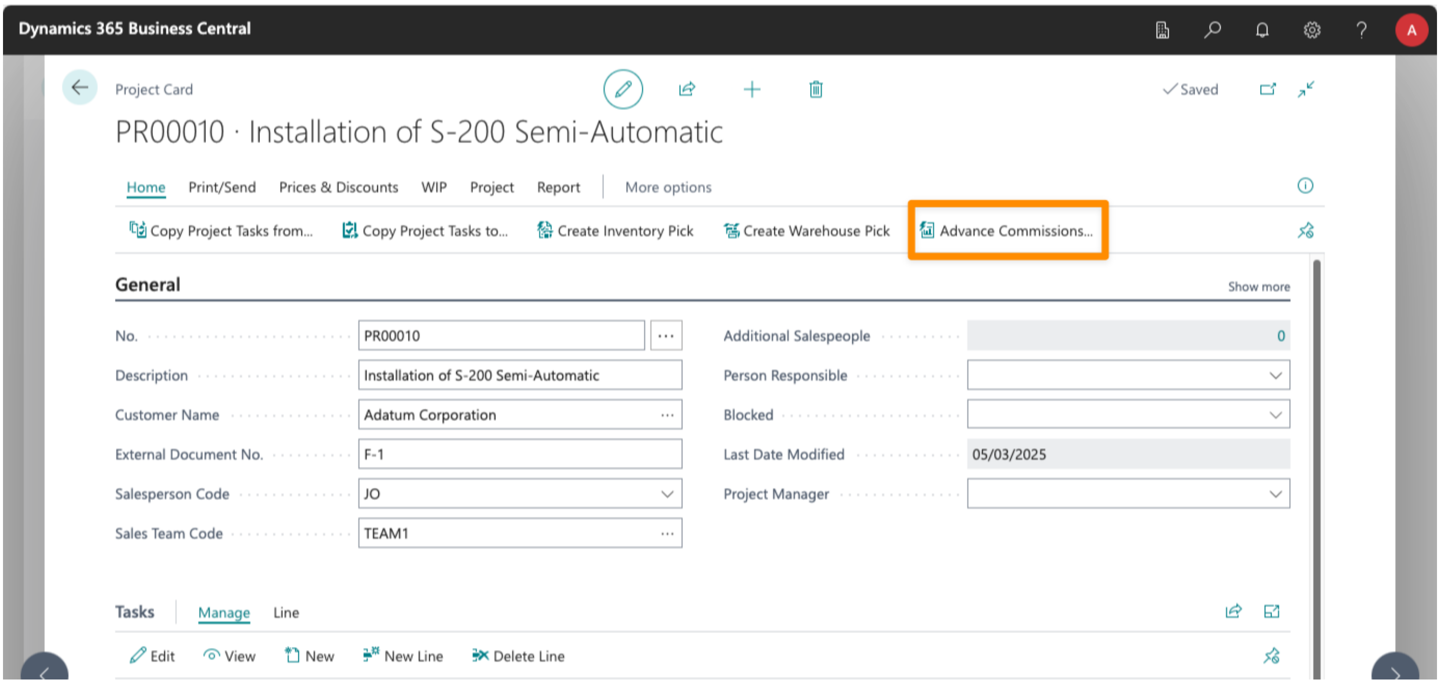
## Description

iDynamics Commissions lets you generate commissions immediately after you define the project in Business Central, before any invoices have been issued. This can be useful if you want to pay part of the commissions to your salespeople after they sign a project, but before it's actually invoiced.

> ⚠ **WARNING**
>
> This functionality applies when commissions are generated from sales invoices posted for each project. If you use commission rates for projects, the option to generate commissions allows you to post the advance directly.

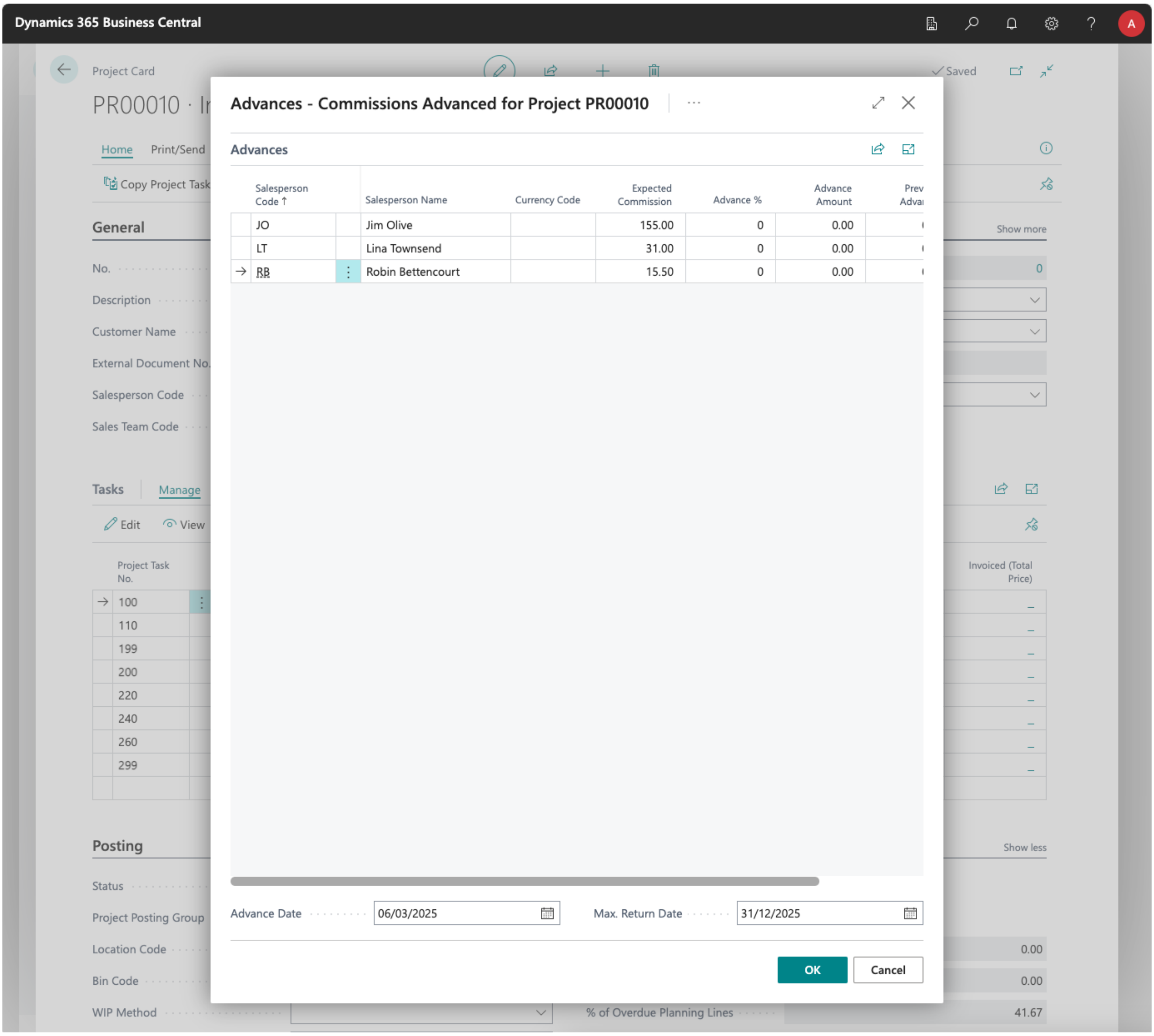
## Advance Commissions

After you've defined all tasks and planning lines, you can use the *Advance Commissions...* action, available in the project card, to advance all or part of the expected commissions for the project.




## Preview and Advance Commissions

When selected, the app will show you a list of all salespeople who are expected to get commissions from the project, as well as the expected amounts.



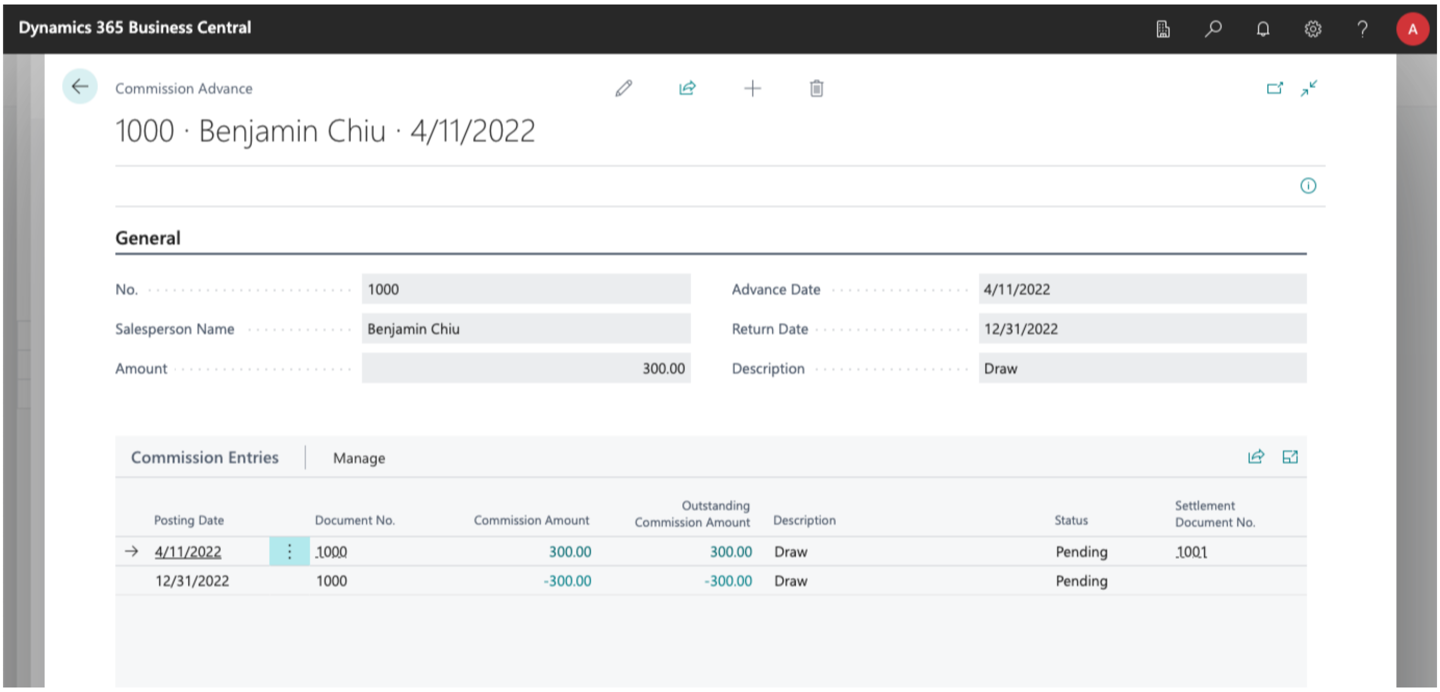

Here, you can specify the amount to advance by entering a percentage in the *Advance %* column, or a fixed amount in the *Advance Amount* column (when you enter a value in one of these fields, the other will be automatically calculated).

If you have already posted commission advances, the *Previous Advances* column will show this information, and the *Total Advanced Amount* will give you the total of the previously advanced amount and any extra amount that you want to advance.

Finally, the *Advance Date* and *Max. Return Date* let you specify the date on which the advances will be made effective, and the maximum date by which they have to be returned. When you confirm the dialog, the advances will be linked to the project, and the advance will have to be returned when the document is posted or collected, depending on when you pay commissions.

# Posted Commission Advances

Posted commission advance documents will be generated for each entry posted using the commission advances journal. They contain info about the posted advance, as well as info on the two generated commission entries.




The posting date of each commission entry shows when it will be effective (when running the settle commissions action), and the status column shows whether the commission has already been settled with the salesperson or not.

# Commission Penalties

## Description

iDynamics Commissions lets you define commission penalties under certain conditions.

## Customer Payment Delays

You can define commission penalties so that when an invoice is not paid on its due date, commissions will be reduced for the salesperson.

Learn how to configure late payment penalties

## Sales Below Cost

Special commission rates can be defined so that, when a salesperson gives an item for free or sells it below cost, the cost of the item will be deducted from their commissions.

Learn how to define commission rates for sales below cost

## Payment Discounts

By default, iDynamics Commissions will ignore payment discounts when calculating commissions, but you can configure the app so that these discounts lower the commission received by each salesperson.

Learn how to configure the app so that payment discounts affect commissions

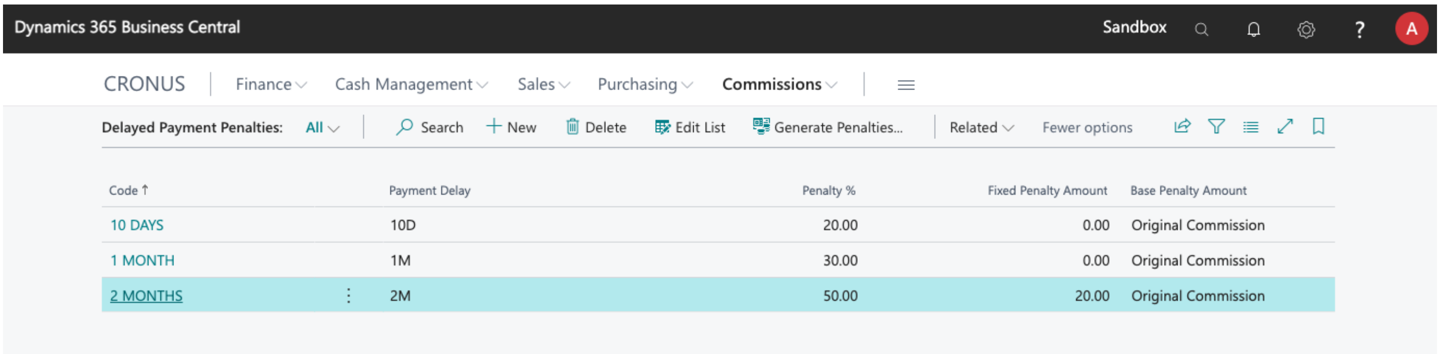
# Payment Penalties

## Description

iDynamics Commissions lets you define penalties that will apply when invoices are not paid on their due date. These penalties can just take part of the commission given to the salesperson, cancel it completely, or even create a negative commission amount if needed.

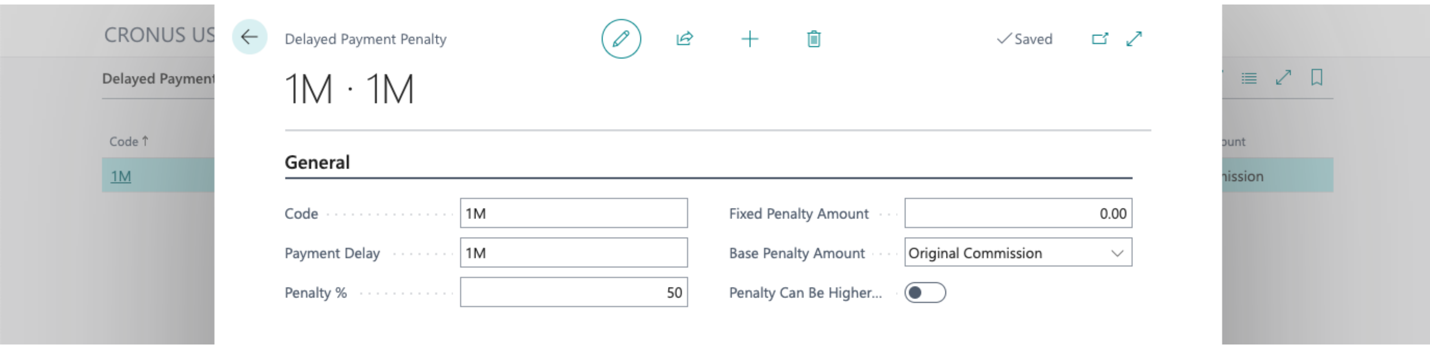
## Setup Penalty Rules

You can access the *Delayed Payment Penalties* list from the Commissions menu, or by searching for it in the Business Central Tell Me... box.




## Penalty Amounts

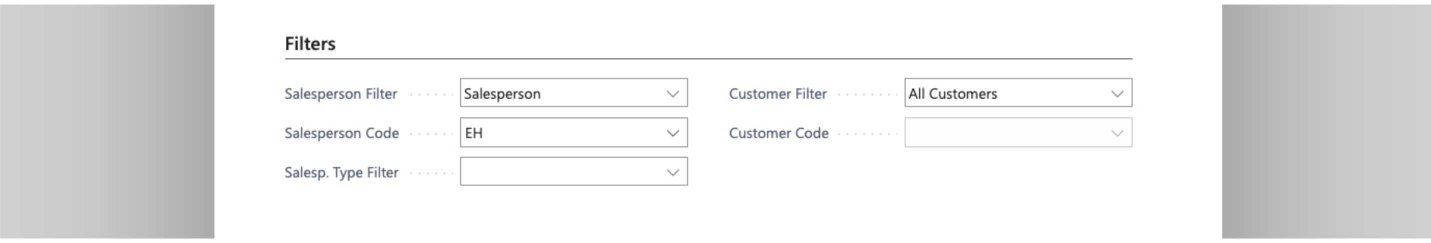
These are the fields available when defining delayed payment penalties:




- **Code**. A unique code that lets you identify the penalty.
- **Payment Delay**. A date formula that specifies when the penalty will take effect. E.g. "1D" means that the penalty will apply if the payment is delayed for more than one day. "30D" would be thirty days after the invoice due date, and "1M" would be a one-month delay (collected on/after the same day of the next month).
- **Penalty %**. If specified, this will be the % subtracted from the original/remaining commission (see Base Penalty Amount).
- **Fixed Penalty Amount**. Lets you specify a penalty amount regardless of the original commission (both a % and a fixed penalty can be specified).
- **Base Penalty Amount**. This specifies whether the penalty % will be calculated on the original amount, or the remaining amount (after previous penalties have been applied).
- **Penalty Can Be Higher Than Commission**. By default, penalties will subtract the commission from the salesperson until the commission amount is zero, canceling the commission at that point. If this is enabled, though, this penalty will go below zero if needed, creating a negative commission.

## Additional Filters

You can set additional filters so that some penalties just apply to specific salespeople or invoices from particular customers.

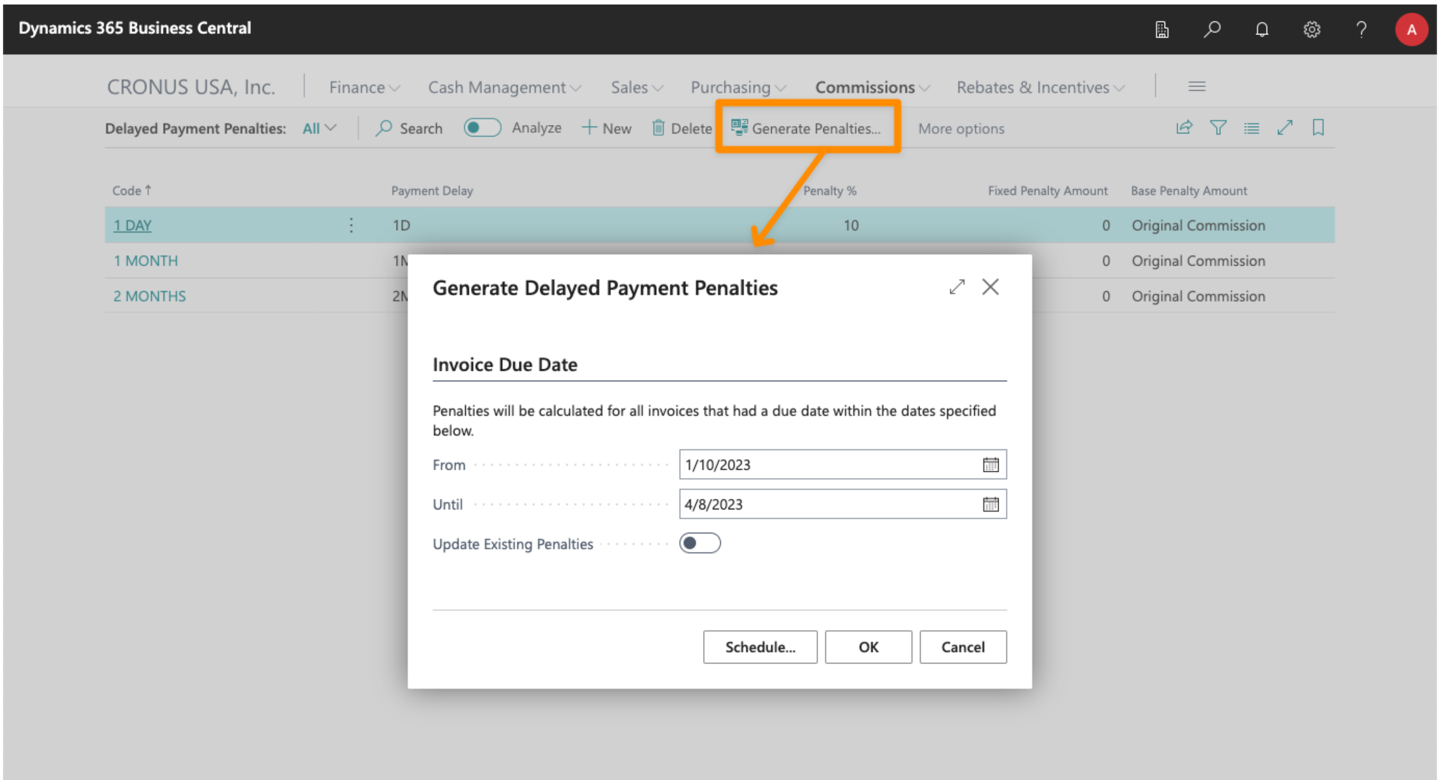



ℹ **NOTE**

Penalties are always additional. This means that if you define a general penalty for everyone, and then a penalty specific for a particular salesperson, both with the same payment delay formula, when the condition is met, both penalties will be applied to the commissions generated for the invoice.

# Applying Penalties

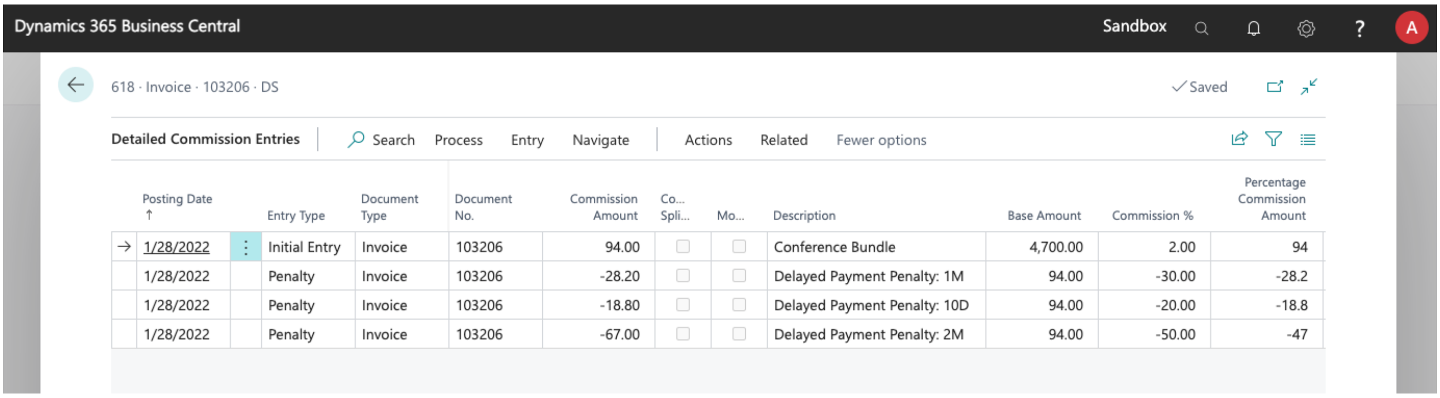
In the previous list, in the action bar, you will see a *Generate penalties...* action. This will check all sales invoices with a due date in the specified date period and, if the invoice has not yet been paid (or was paid after the fact), penalties will be generated.




Some considerations:

- Penalties will be generated just once for each invoice/salesperson. An invoice can have multiple penalties (e.g. 1D, 15D, 30D...) but each one will only apply once to the generated commissions, no matter how many times the action is executed.
- Penalties will not apply to canceled commission entries nor to canceled invoices.

Once penalties have been generated, you will see them as detailed entries on every commission that was affected by them:



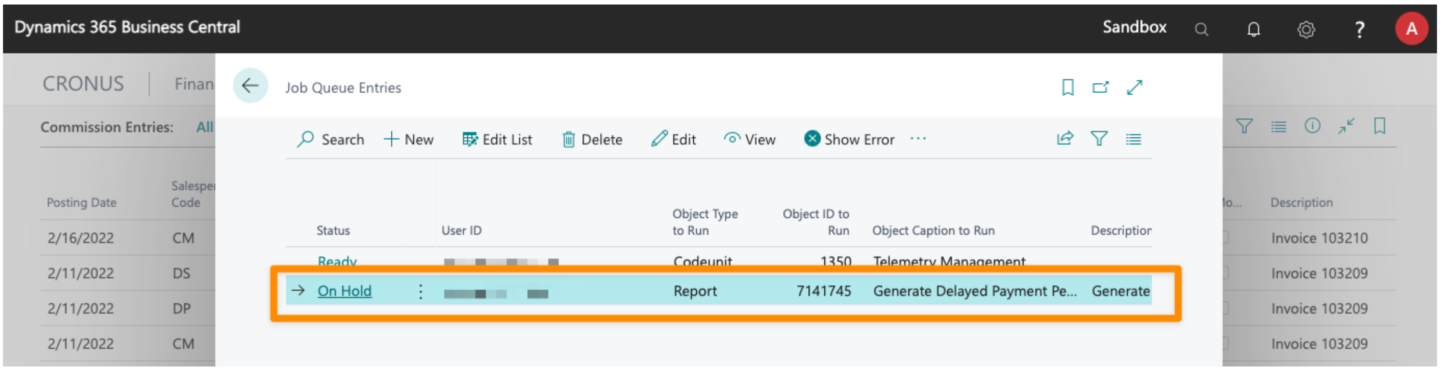

# Payment Margin

In the general setup page, you can define a delay notice margin for the payment date. This margin is used so that invoices are not automatically marked as unpaid immediately after the due date, as sometimes it can happen that the invoice was paid on time, but the info is not entered into Business Central until the fact.

This margin is also used when calculating the default *until date* in the penalty generation report. By default, it will be today minus this margin, in order to let this margin as well, when calculating the penalties that might apply.

# Automate Penalty Generation

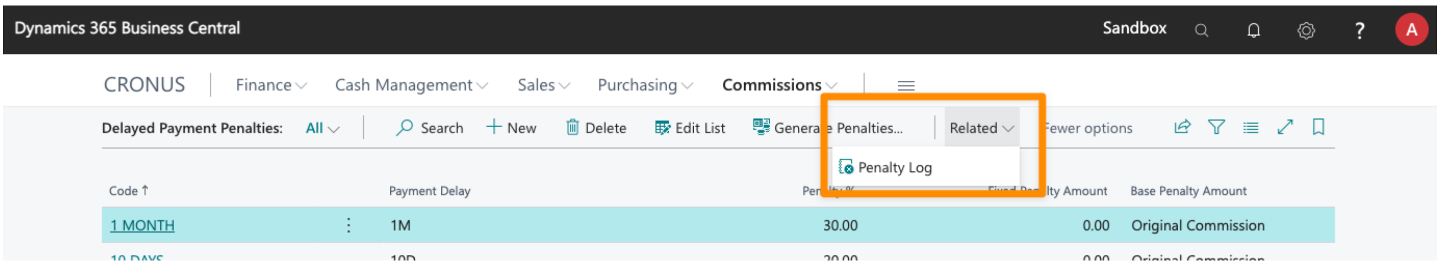
When installed, iDynamics Commissions creates a job, disabled by default, that will run the report to generate penalties daily. Once you have defined penalties, you can enable it to generate these penalties, if you don't want to run the process manually every time.




# Penalty Log

When the process to generate penalties is executed, errors (if any) will be logged so that you can review them and fix them. Errors can happen if a commission entry that should receive penalties is currently assigned to a purchase or settlement document, as commissions can not be updated while being settled.

If there were any problems while generating penalties this log will be automatically shown at the end of the process. If the generation process was triggered by the scheduled task, you can check the log using the *Penalty Log* action in the *Delayed Payment Penalties* list.



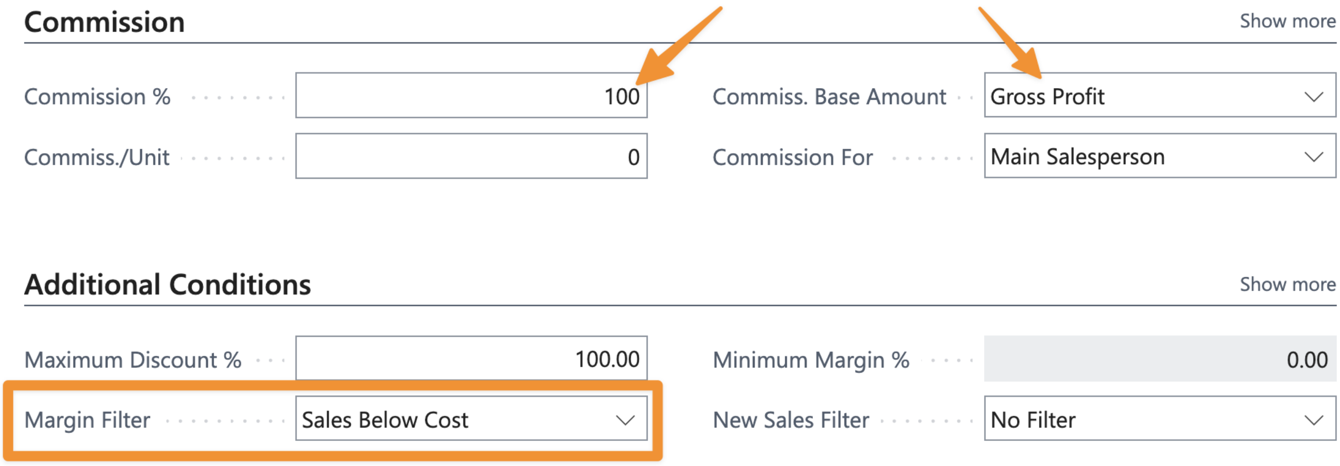
# Sales Below Cost

## Description

By default, when you configure commission rates, they don't apply when an item is sold below cost. You might want, however, to apply a penalty to the salesperson commissions, so that the cost is deducted from them.

## Configure a commission rate for sales below cost

In order to do so, create a commission rate where the *Margin Filter* is set to *Sales Below Cost*, in the *Additional Conditions* tab of the commission rate card:




In the example above, the commission has been configured as 100% of the gross profit, that in this case will be the amount below cost for the line, so that the full cost is deducted from the document commissions.

**NOTE**

You can also set the *Margin Filter* to *No Filter*, if you want the same % to apply both as a commission and as a penalty.

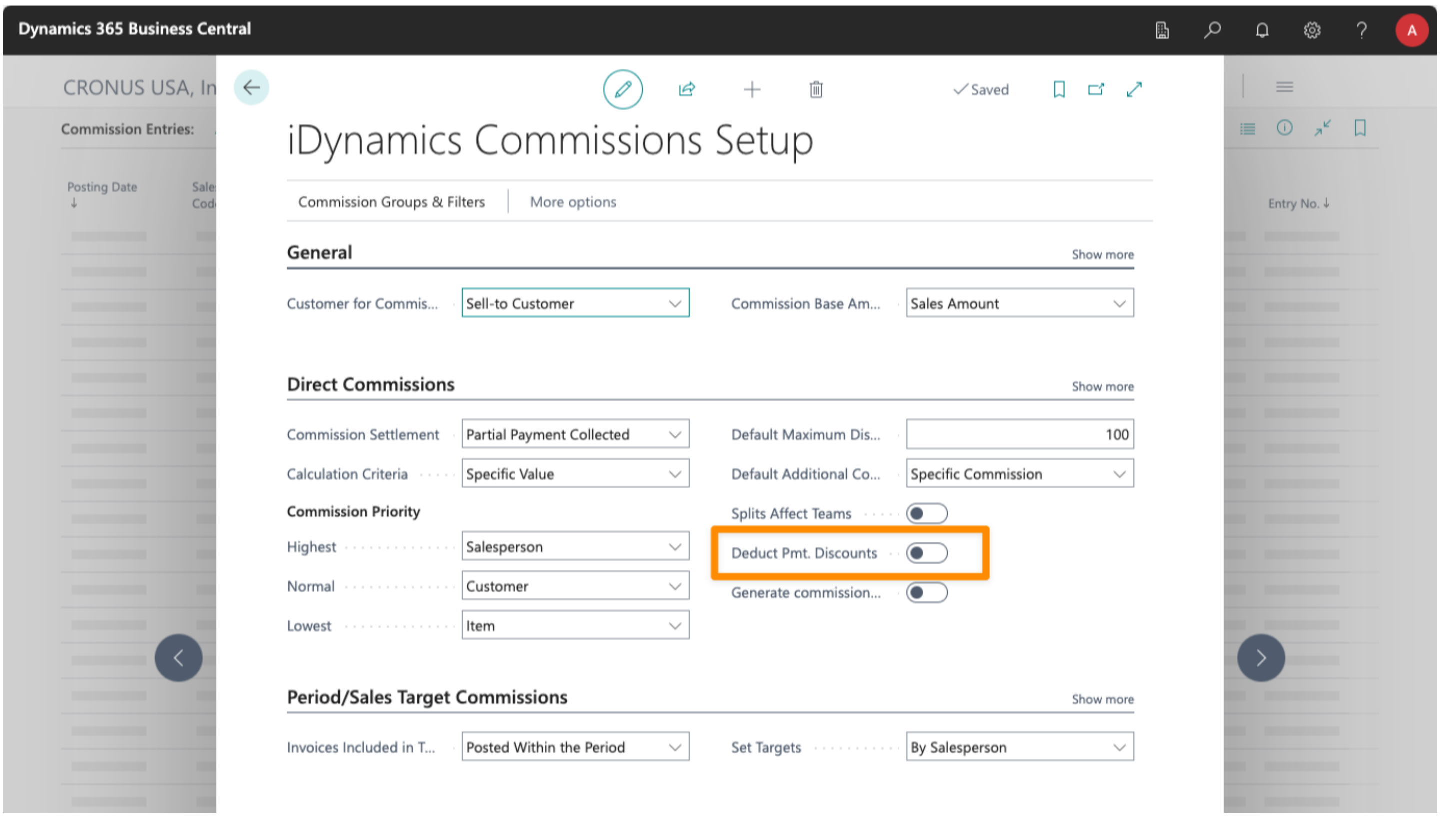
# Payment Discount Penalties

## Description

Payment discounts are a standard Business Central feature that lets you apply a discount to the customer if they pay within N days since the invoice was issued.

By default, iDynamics Commissions will ignore this discount and generate direct commissions based on the original invoice amount, without discounts. This is the most common scenario, as this discount is usually offered by the company, not the salesperson, and this could incentivize your salespeople to actively ask your customers to pay later so that they don't get a lower commission.

If you would like to deduct this discount from the generated commissions, you can activate the *Deduct Pmt. Discounts* option, in the general setup page.




When this option has been checked, once a payment discount is applied to an invoice, a penalty equivalent to the discount % will be applied to all generated commissions (e.g., if the commission was $100, and the discount was 2%, then a -$2 deduction would be applied to the commission).

# Sales Statistics

## Description

In addition to defining and generating commissions, one of the main features that iDynamics Commissions adds to Business Central is the capability to assign more than one salesperson to a sales document.

Not only that, but the app is designed to give you the capability to differentiate between what the salesperson has sold and what the company has actually invoiced. What do we mean by this? When a salesperson achieves a sale:

- The company might give a payment discount to the customer if they pay before a certain date.
- Shipping or handling costs might be added to the invoice.

These are just two examples of things that might affect the final amount invoiced to the customer, but that should not affect the sales statistics of a salesperson: they should not be penalized because the company offered a payment discount, nor the shipping costs of the items they sold should be taken into account as sales achieved by them (note: this is configurable).

iDynamics Commissions generates sales statistics that:

- If specified, split the invoice amount between all the salespeople that took part in a sale.
- Ignore any payment discounts given to the customers.
- Ignore lines configured not to be taken into account towards sales achieved by the salesperson (such as shipping charges).

## Check Sales Statistics

You can check all sales statistics generated by the app from the *Sales Statistics* option in the *Commissions* menu. Here, you can check the data generated and export it to Excel for analysis.

Learn about the statistics records created by the app

## Sales & Commission Factboxes

iDynamics Commissions adds several factboxes to Business Central that give you instant information on how sales are going, in the current period, for a sales team, salesperson, item, customer, or commission group.

Learn about the sales and commissions factboxes available

## Exclude Sales Lines form Statistics

Items, resources, G/L accounts, item charges, and fixed assets can be configured to be excluded from sales statistics so that the amounts in sales lines assigned to them are not added to the sales amounts shown in reports generated by the app.

Learn how to exclude sales lines from statistics

## Split Sales Amounts Between Multiple Salespeople

In the *Sales Documents* chapter of this help, you can find how to add multiple salespeople to a sales document. Here you will learn how to split the invoice amounts between them so that they count towards their sales statistics (and their sales targets).

Learn how to split the amounts in a sales document between multiple salespeople

## Import Sales Statistics

If you are migrating from another system and all of the sales for the current period are not available in Business Central, or if you want to make adjustments to the stats generated by the app, the import stats journal lets you add or remove amounts to the stats generated by the app, that will be used in sales reports and when calculating commissions for sales targets.

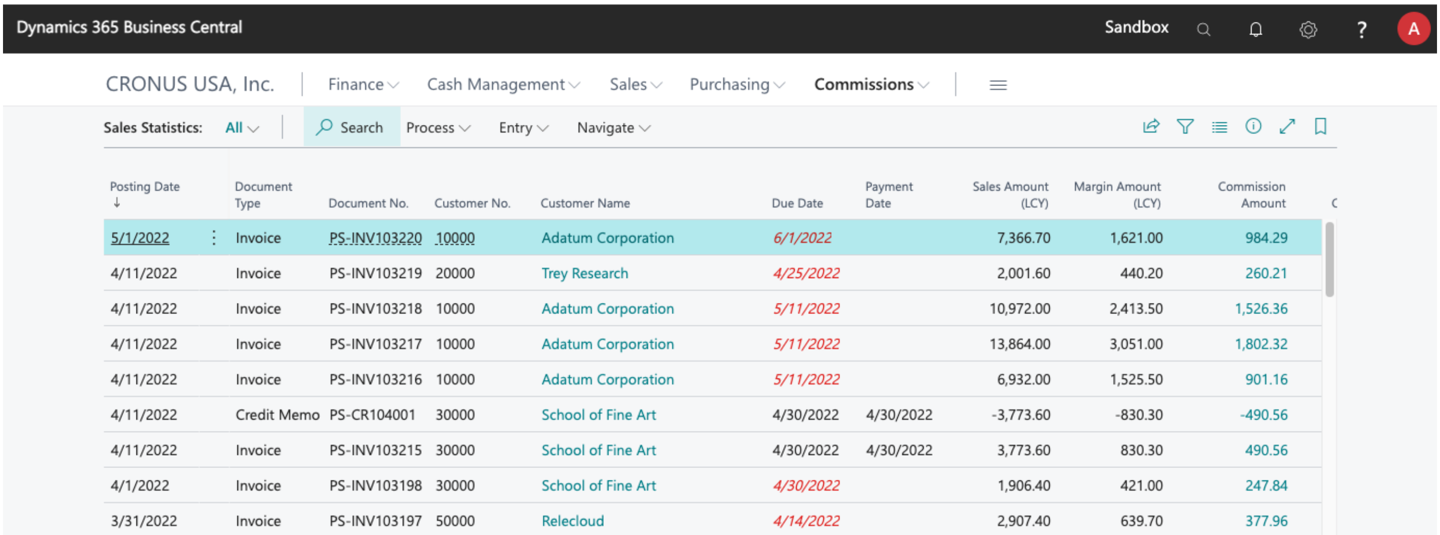
Learn more about the import sales stats journal

# Check Sales Statistics

## Description

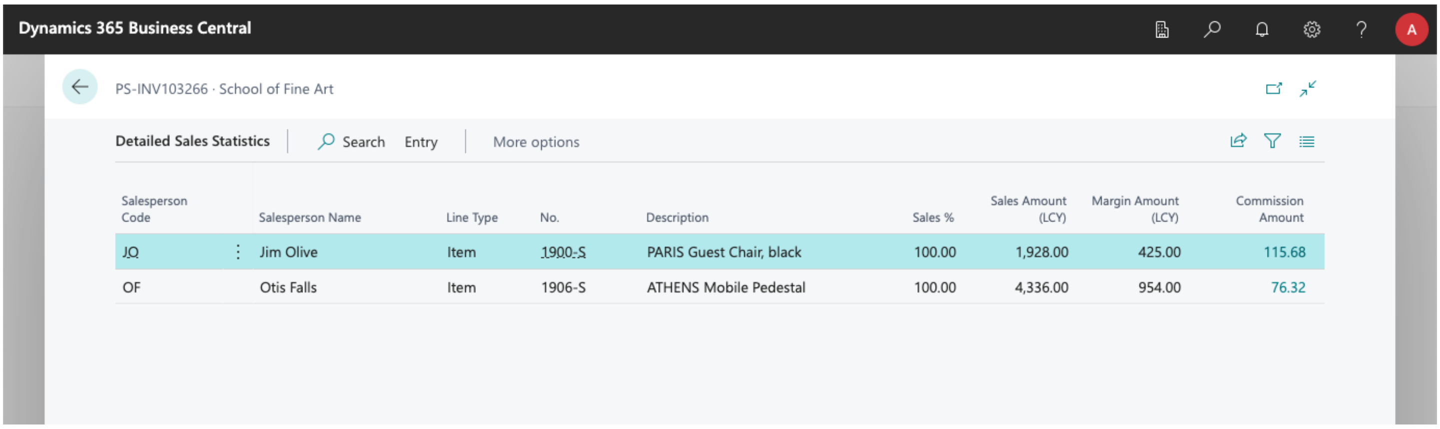
From the *Commissions* menu, or by searching for *Sales Statistics* in Business Central, you can check the list of statistics generated by the app. These stats show:

- Both sales invoices and credit memos posted in Business Central in a single list.
- The total amounts ignoring any payment discounts or excluded sales lines.
- Both the expected payment date and the actual payment date.
- The total commission amount generated for each document (and the % they represent on the total document amount).



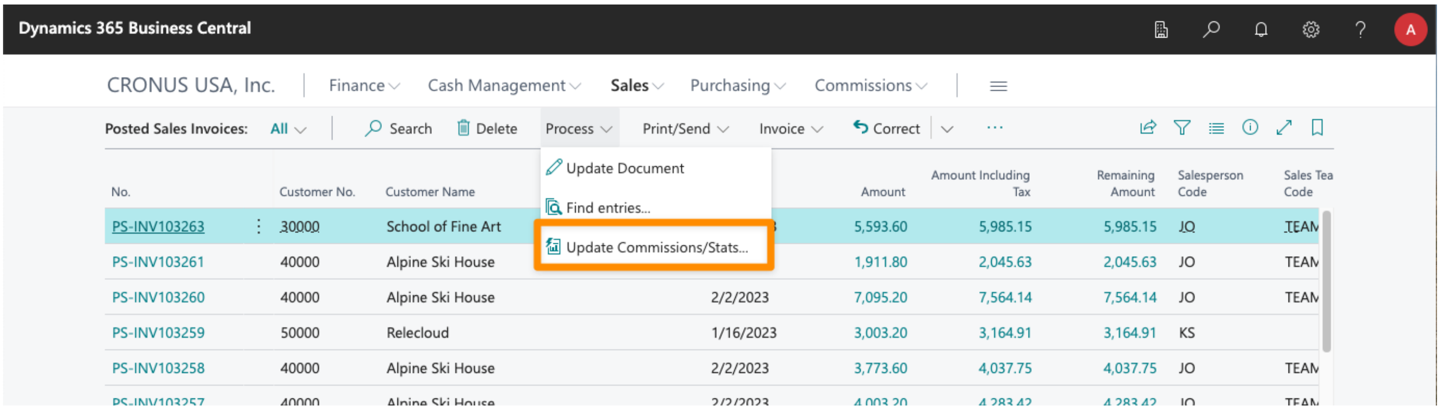

## Salesperson/Detailed Sales Statistics

Select any of the records in this list and click on the *Detailed Sales Statistics* action, to get a detail of how the sales document amounts were split among all the salespeople that took part in the sale. iDynamics Commissions lets you assign each document line to a different salesperson if needed, and both the whole document or a single line can also be split with multiple salespeople.




## Update Sales Statistics

Statistics will be generated for all sales invoices and credit memos posted in Business Central after iDynamics Commission has been installed. If you want to generate statistics for documents that already existed in the database or update them after you have made changes to configuration (e.g. marked an item to be excluded from statistics), you can use the Update Commissions/Stats action, available on the posted sales invoices and posted sales credit memos lists, as well as in the sales stats list, inside the *More options* > *Actions* menu.

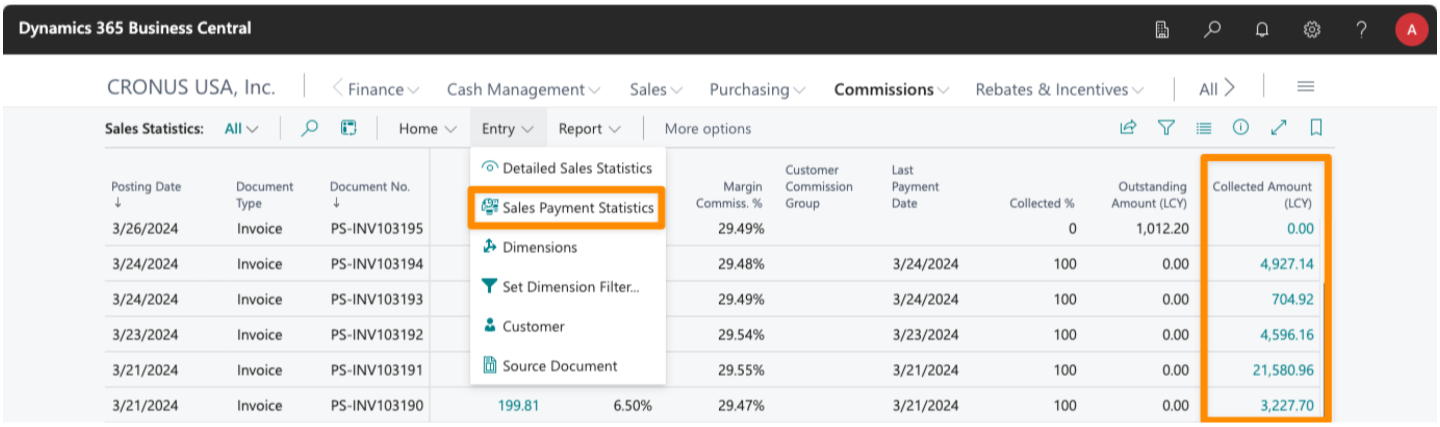

Dynamics 365 Business Central
CRONUS USA, Inc.
Finance
Cash Management
Sales
Purchasing
Commissions
Posted Sales Invoices:
All
Search
Delete
Process
Print/Send
Invoice
Correct
Update Document
Find entries...
Update Commissions/Stats...
No.
Customer No.
Customer Name
Amount
Amount Including Tax
Remaining Amount
Salesperson Code
Sales Tea Code
PS-INV103263 30000 School of Fine Art 5,593.60 5,985.15 5,985.15 JO TEAM
PS-INV103261 40000 Alpine Ski House 1,911.80 2,045.63 2,045.63 JO TEAM
PS-INV103260 40000 Alpine Ski House 2/2/2023 7,095.20 7,564.14 7,564.14 JO TEAM
PS-INV103259 50000 Relecloud 1/16/2023 3,003.20 3,164.91 3,164.91 KS
PS-INV103258 40000 Alpine Ski House 2/2/2023 3,773.60 4,037.75 4,037.75 JO TEAM

# Payment Stats

## Description

iDynamics Commissions keeps track of all payments received for each sales invoice. We use this information to know which % of an invoice has been paid (if you pay commissions based on this), or to consider partial payments towards sales targets, based on what has been configured for the period.

You can check this information by navigating to the *Sales Stats* page and clicking on the *Sales Payment Statistics* action, or directly in the *Collected Amount (LCY)* column.



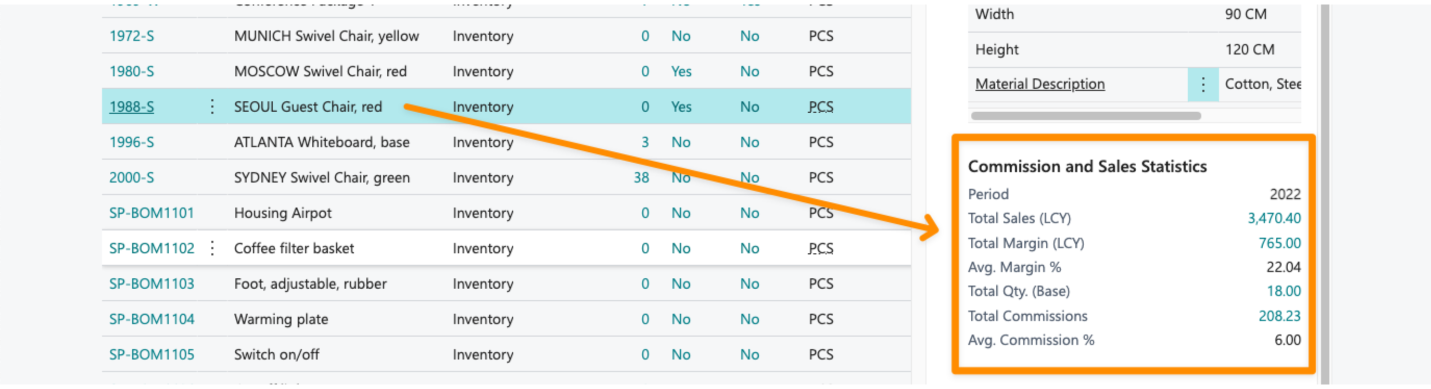
# Sales & Commission Factboxes

## Description

Once a reference period has been set, these lists will include a factbox showing a summary of sales and commission for the selected record, in this period.

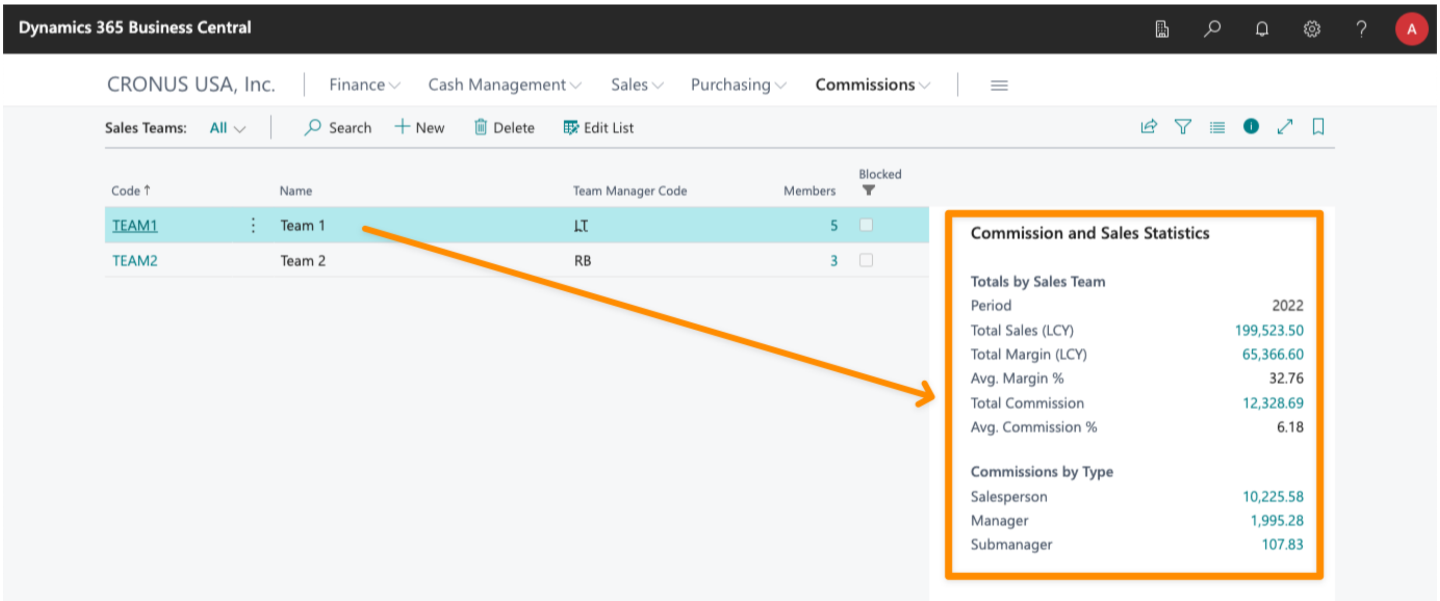
## Items

In the item list, you can quickly check current sales for the selected item, in the reference period, as well as the average sales margin and commission given by each sale.



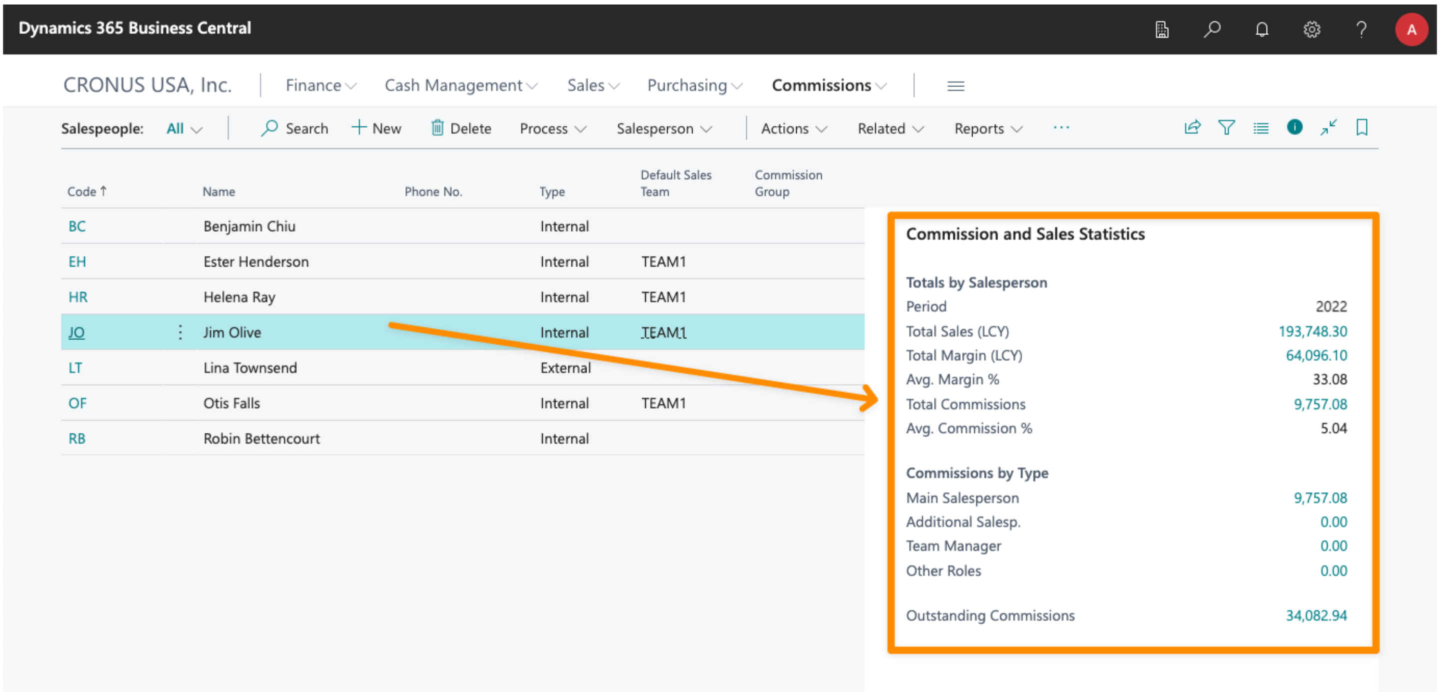

## Sales Teams

This factbox gives you a summary of all sales and commissions achieved by the selected sales team.



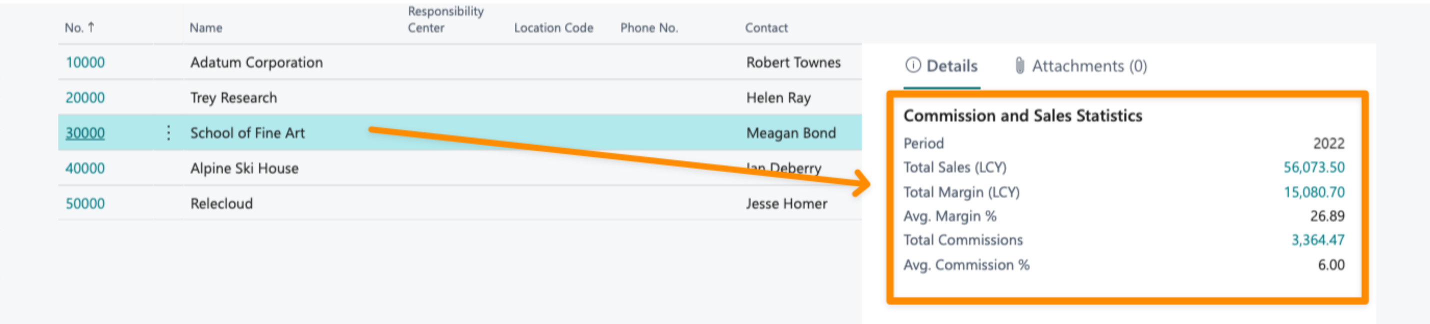

## Salespeople

This factbox shows all sales and commissions achieved by the selected salesperson, in the reference period, as well as the details of the direct commissions achieved, showing whether they were the main salesperson assigned to the document, an additional salesperson, or if the commissions were given because they were the team manager (or had another role within the team).



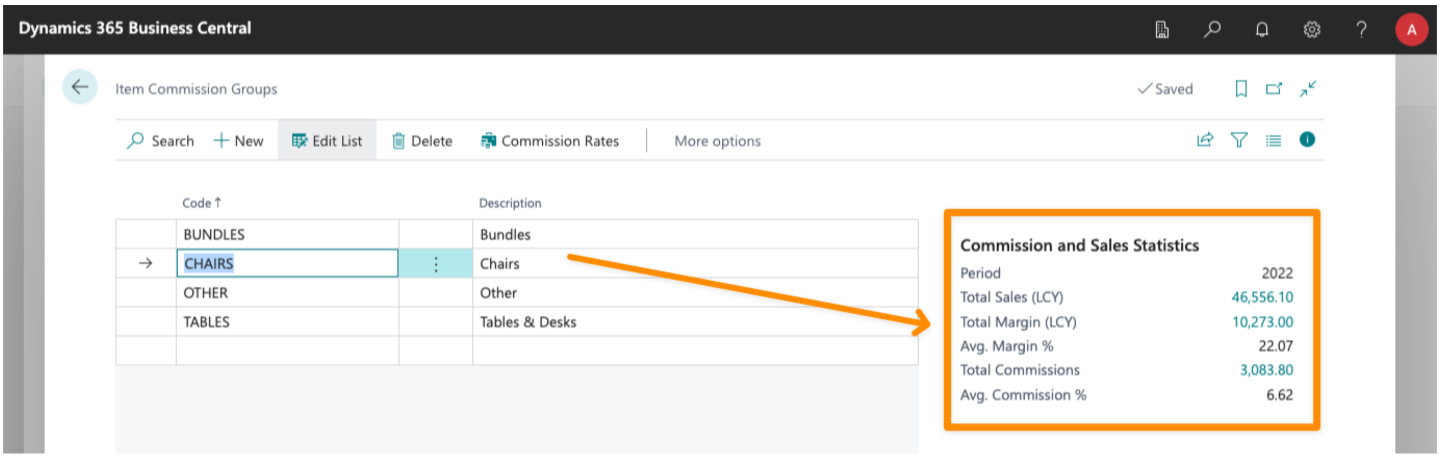

# Customers

In the customer list, you can quickly check all sales posted for the selected customer in the active reference period, as well as info on the commissions generated by these sales.




# Commission Groups

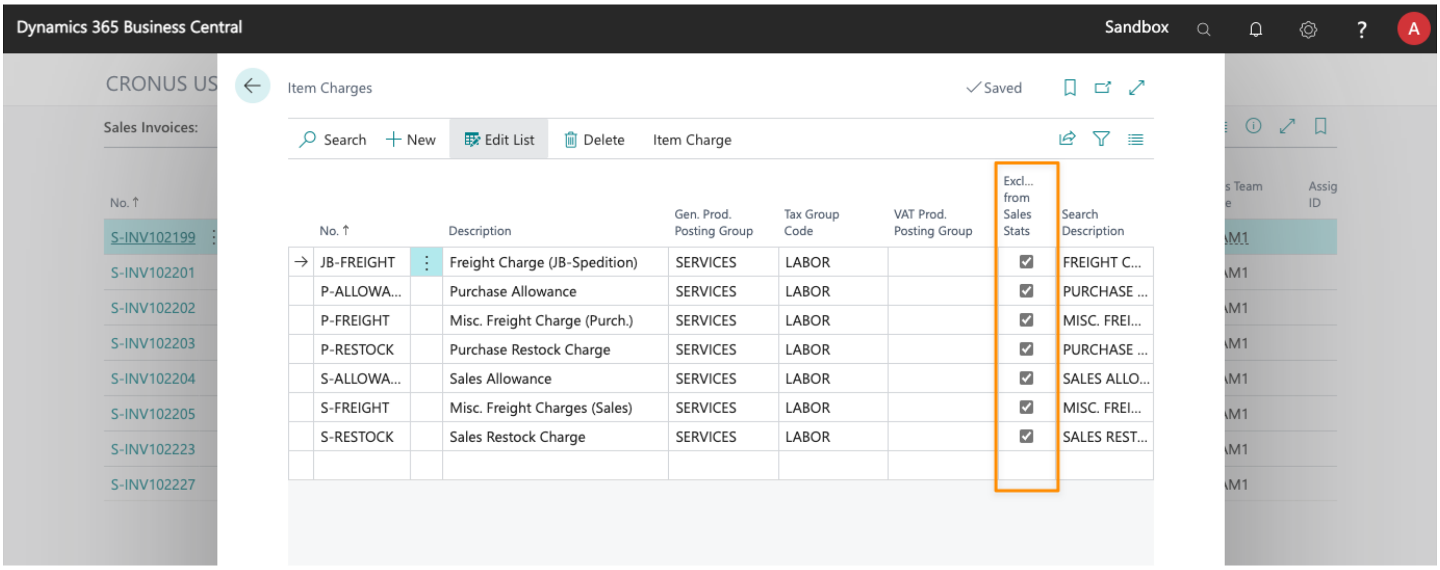
If you have defined item, customer, or salesperson commission groups, you will find a factbox next to them where you can see all sales posted for the selected group during the reference period, as well as the commissions given for those sales.



# Exclude from Sales Statistics

## Description

Items, resources, G/L accounts, item charges, and fixed assets can be configured to be excluded from sales statistics so that the amounts in sales lines assigned to them are not added to the sales amounts shown in reports generated by the app. This can be useful, for example, to exclude shipping charges from sales reports.




If you mark any of these elements as *Excluded from Sales Stats*, they will be automatically excluded from statistics and commissions when added to a sales document.

If posted invoices already exist, when you configure this option, you can use the *Update Commissions/Stats...* action, in the *Posted Sales Invoices* and *Posted Sales Credit Memos* lists, to update statistics for those documents (there is no need to update commissions or commission groups when running that action).

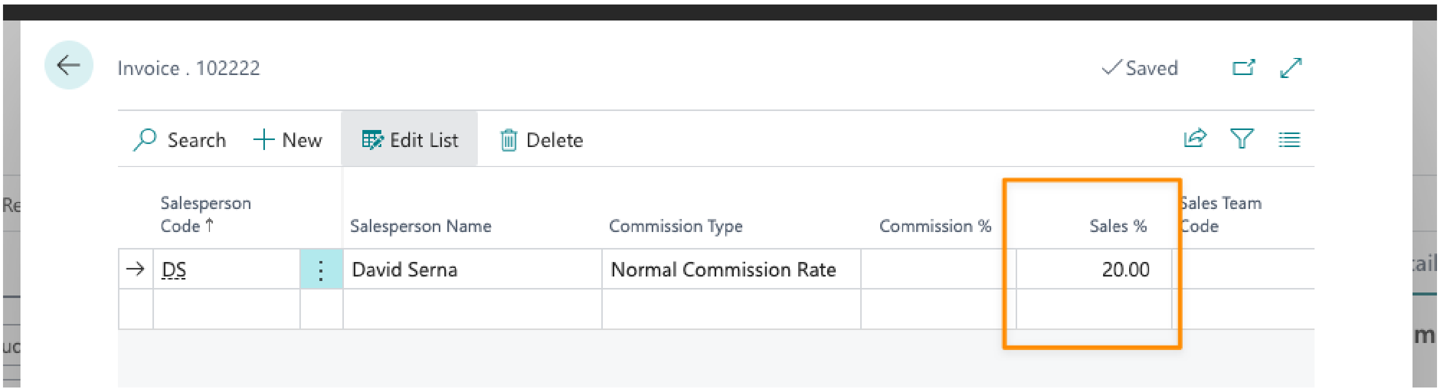
⚠ **WARNING**

When a sales line is excluded from sales statistics, it will automatically be excluded from sales commissions as well.

# Split Sales Amounts

## Description

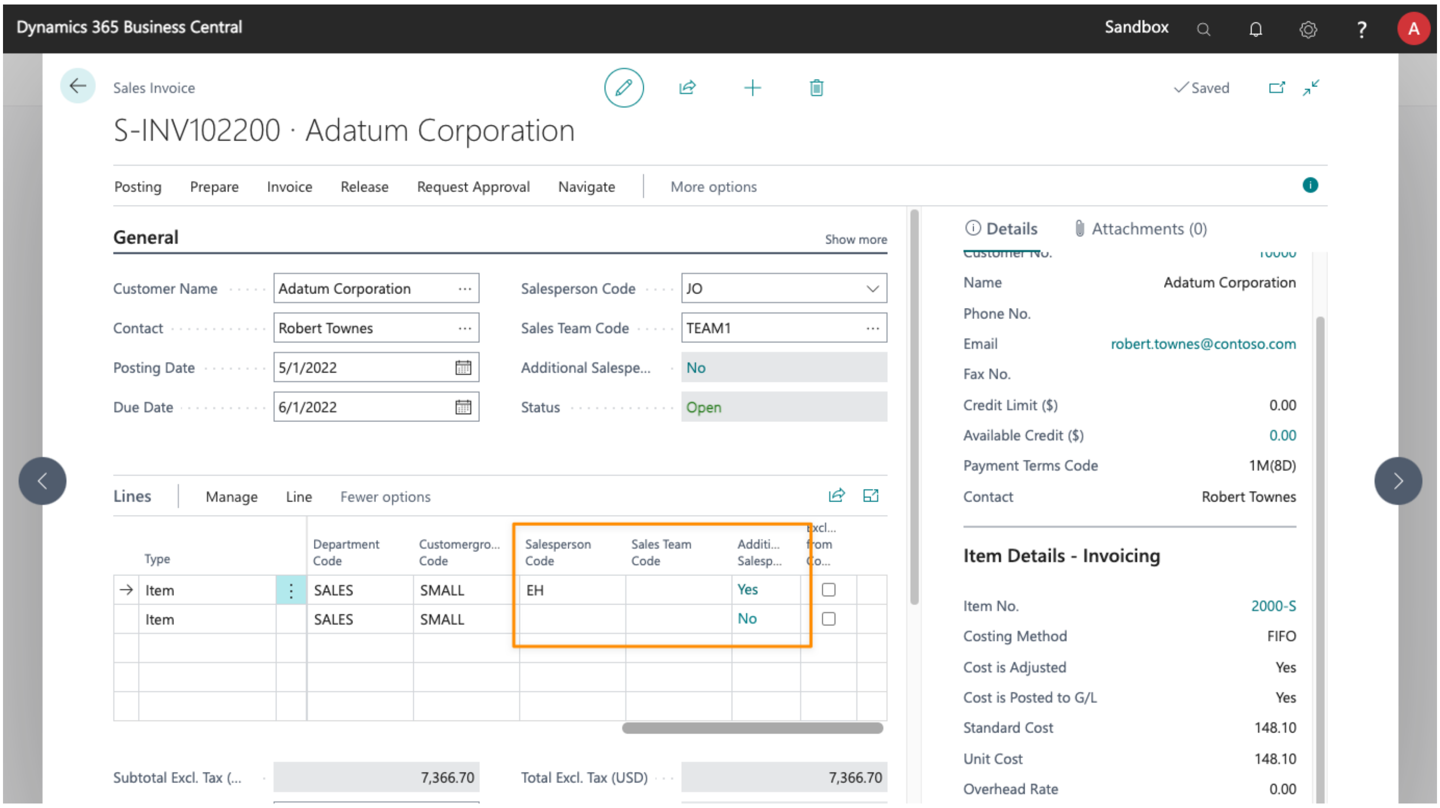
By default, when it comes to sales statistics, the main salesperson (the one assigned in the sales header or line) will get 100% of the sale, regardless of how many salespeople took part in it. When you add additional salespeople to a sales document (or a particular sales line), however, you can assign a Sales % to each one of them, which will be taken from the main salesperson.




If you add an additional salesperson, for example, and set a 20 sales % for them, this means that they will get this sales percentage, and the main salesperson will get the remaining 80%. This will affect not only the generated sales stats and its reports but also any sales targets set for them.

## Sales Lines

Note that, in addition to adding additional salespeople to the document (or any of its lines), you can assign a particular salesperson to any sales line. This salesperson will be treated as the *main* salesperson for the line, and the sales amounts will be assigned to them, instead of the salesperson assigned to the sales header.

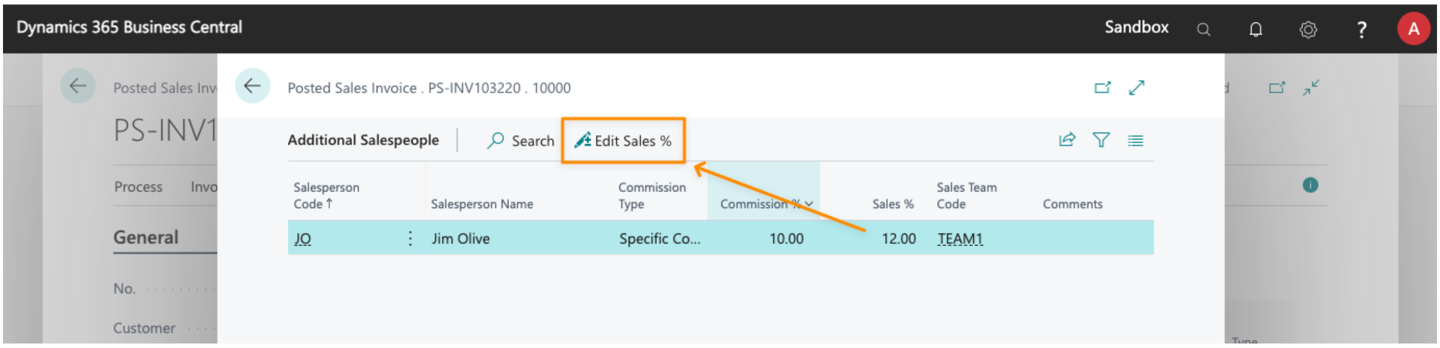



Sales lines can also have their own list of additional salespeople assigned to them, each getting a different % of the sales amount.

# Update Posted Documents

While the salespeople assigned to a sales document can not be modified once the document has been posted, the share of the sales amount that was assigned to each additional salesperson can be updated after the fact.

Use the *Edit Sales %* action, available in the list of additional salespeople for a posted invoice or credit memo, in order to change the % of the sale that belongs to each one (the main salesperson will always get the remaining % of the sale).

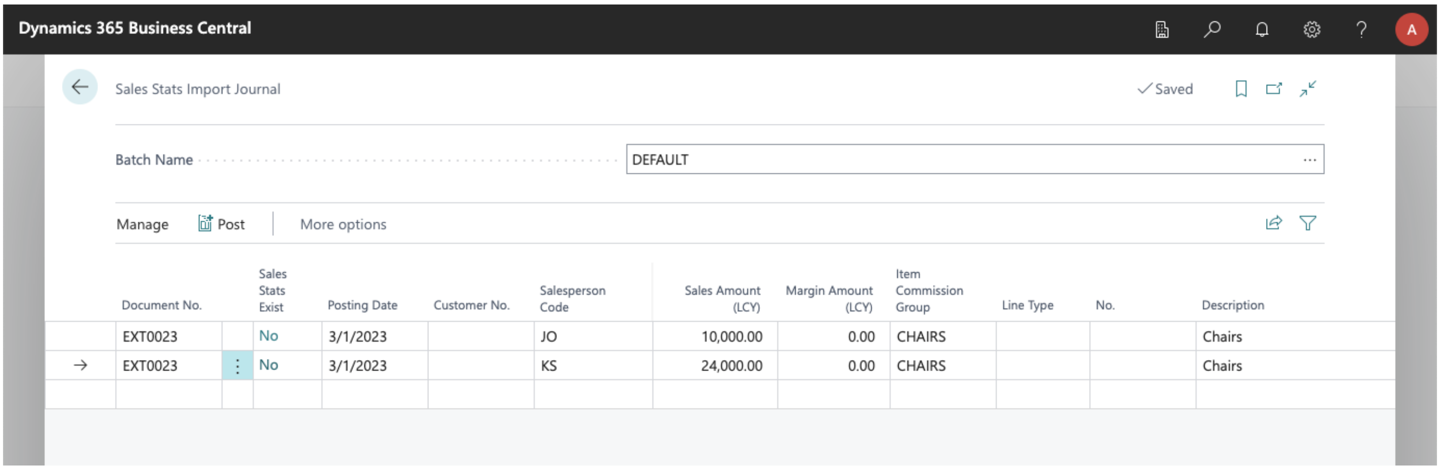


# Import Sales Stats

## Details

If you are migrating from another system and all of the sales for the current period are not available in Business Central, or if you want to make adjustments to the stats generated by the app, the import stats journal lets you add or remove amounts to the stats generated by the app, that will be used in sales reports and when calculating commissions for sales targets.

The journal can be accessed from the *Commissions > Import Data* menu, or by searching for *Sales Stats Import Journal* in Business Central.




## Available Fields

You can import accumulated amounts for a salesperson/date or split them between different item groups or even specific items/resources/GL accounts. Being more or less specific is totally optional and will affect which sales targets include the sales stats, as well as how sales for the salesperson are reported.

- **Document No**. You must add an identifier for the imported stats. It does not necessarily have to be linked to an actual external document (e.g. you could create a code for all chair sales in may).
- **Sales Stats Exist**. This field shows you whether stats already exist for the Document No. / Salesperson Code combination. If they do, the amounts specified in the journal will be added to the existing imported sales stat.
- **Posting Date**. The date on which this amount will be considered posted and collected.
- **Customer No.** Optional. You can assign a customer to the sales statistic. This can be useful if you want to link the amount to a customer so that it is shown in the customer stats and/or you are defining sales targets based on the customer. Note that you can just assign the *Customer Commission Group* and ignore this field.
- **Salesperson Code**. The salesperson for which you are importing the sales amount.
- **Sales Amount (LCY)**. The sales amount imported.
- **Margin Amount (LCY)**. Optional. This can be useful so that margin stats are correctly calculated for the salesperson, or if you set sales targets based on the margin achieved (if zero, the whole amount will be treated as margin).
- **Item Commission Group**. Optional. You can specify that this amount belongs to a specific item commission group so that it will be shown/used in stats and sales targets for it.
- **Line Type**. Optional. If needed, you can import amounts for a specific item, resource, or G/L account...
- **No.** If a Line Type has been specified, the specific element for which the stats are being imported.
- **Description**. Optional. A description for the imported sales stat.
- **Quantity (Base)**. Optional. Useful if you want to get stats or set targets based on the quantity sold.
- **Sales Team Code**. Optional. It will be automatically filled in with the default sales team assigned to the salesperson but can be modified to assign the amount to a different team.
- **Salesperson Commission Group**. Optional. It will be automatically filled in with the commission group assigned to the salesperson but can be changed.
- **Customer Commission Group**. Optional. Will be automatically filled in if you select a customer, but can be manually

assigned even if no customer has been selected, so that you can import sales amounts for a specific salesperson/customer group combination.

## Posting

Once all the data that you want to import has been loaded into the journal, you can use the *Post* action to make the amounts effective. The stats will appear in the sales stats list as a document of type "Manual" and will be taken into account on reports and sales targets.

From the sales stats list, imported stats of type *Manual* can be deleted, and adjustments can be done by importing new stats using the same *Document No./Salesperson Code* combination.

# Reports

iDynamics Commissions includes several reports which analyze and provide as much information as possible about all sales and commissions in Business Central.

In this video, you can find out the main available reports.

## Salesperson Commissions

This is the main report that you will use to give each salesperson a summary of all commissions achieved. Includes several designs that you can choose from, and can be easily customized using Microsoft Word.

Learn more about this report and how to customize it

## Detailed Salesperson Commissions

This report is similar to the *Salesperson Commissions* report but, for direct commissions, it will show one line for each sales line that achieved commissions, instead of the total by document.

Learn about the detailed sales commission report

## Vendor Commissions

Similar to the salesperson commissions report, this one is intended for companies that work with external vendors/companies that provide part of their sales force and shows commissions for all salespeople assigned to a particular vendor.

Learn more about this report and how to customize it

## Direct Commissions

The app includes some reports specific to commissions generated using direct commission rates.

Learn more about these reports

## Sales Targets

Check how each salesperson has performed in a specific period, how far away are from achieving their current targets, or get information on how the different targets have evolved over different periods.

Learn more about sales target reports

## General Commission and Sales Reports

Compare sales across commission periods, compare commissions vs sales or commissions achieved vs commissions settled each month.

Learn more about general reports

# Email Reports

Because your sales team does not necessarily has to have access to Business Central, all of the salesperson-specific reports can be sent by email in bulk. Keep everyone informed!

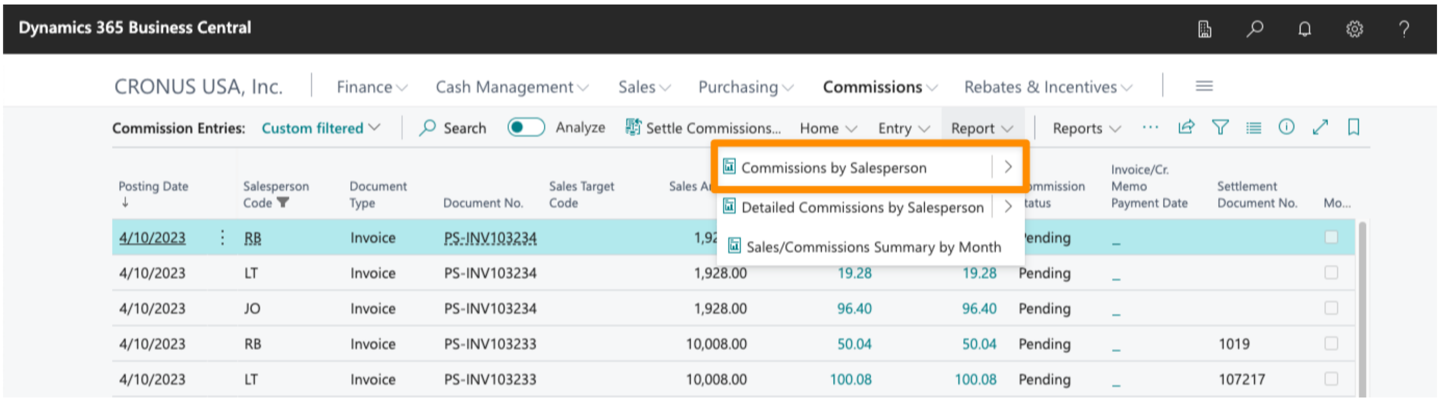
Learn how to email commission reports in bulk

# Salesperson Commissions Report

## Description

This report includes all commissions for a period (this month, last month, a specific date range) or all commissions that are pending settlement. The report has been designed so that it can be customized by the customer using Microsoft Word. Both so that you can decide what information is important for you and your salespeople, and so that you can easily adapt its design to the visual identity of your company.

This report can be found in the *Report* menu, in the action bar of both the *Salespeople/Purchasers* and *Commission Entries* lists.




**NOTE**

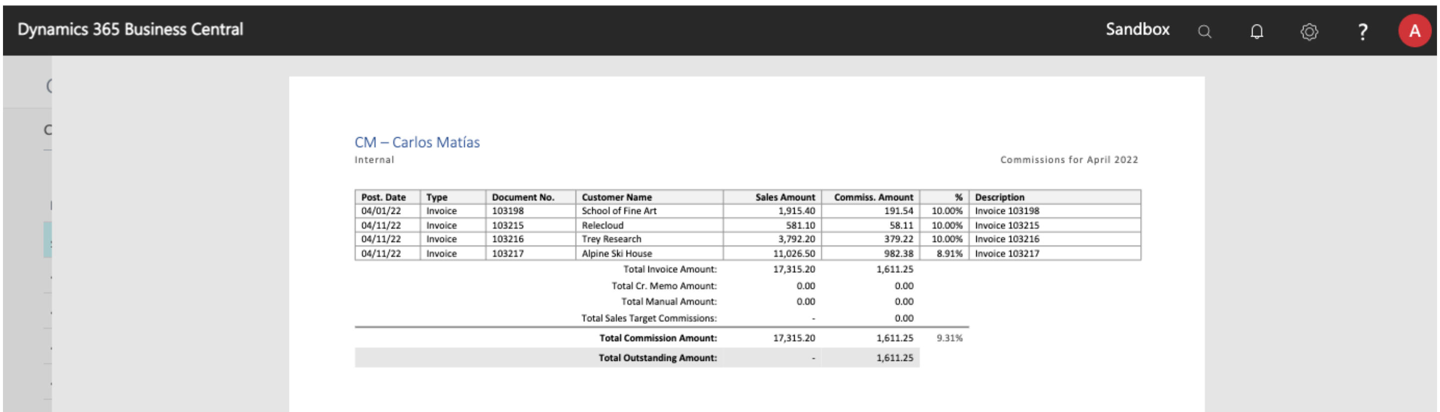
This report can be emailed in bulk to all salespeople that have achieved commissions in the selected period so that they can review it, from the dropdown available to the right of the action.

## Default Layouts

By default, the app includes two example layouts (in Letter and A4 formats), each of them includes different values, so that you can check most of the available data that you can include in it, and copy/paste fields from any of them if you decide to customize them.

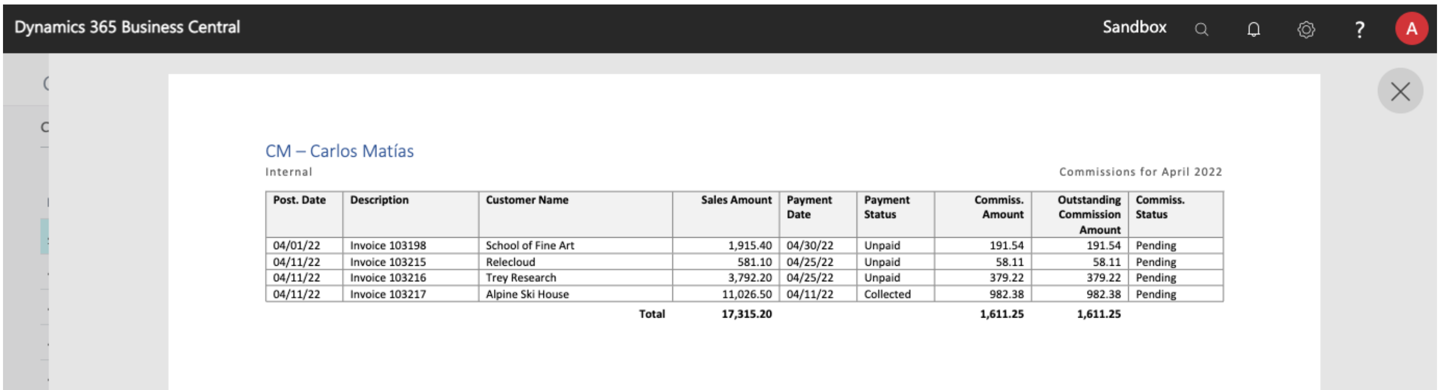
### Default

This layout includes a summary of all commissions and the % that each commission represents on the total of each sale, as well as a breakdown of the totals for each type of document that can generate commissions.




### Commission and Sales Status

This layout includes information on the payment status of the source invoice, as well as information on the settlement status of the commission.

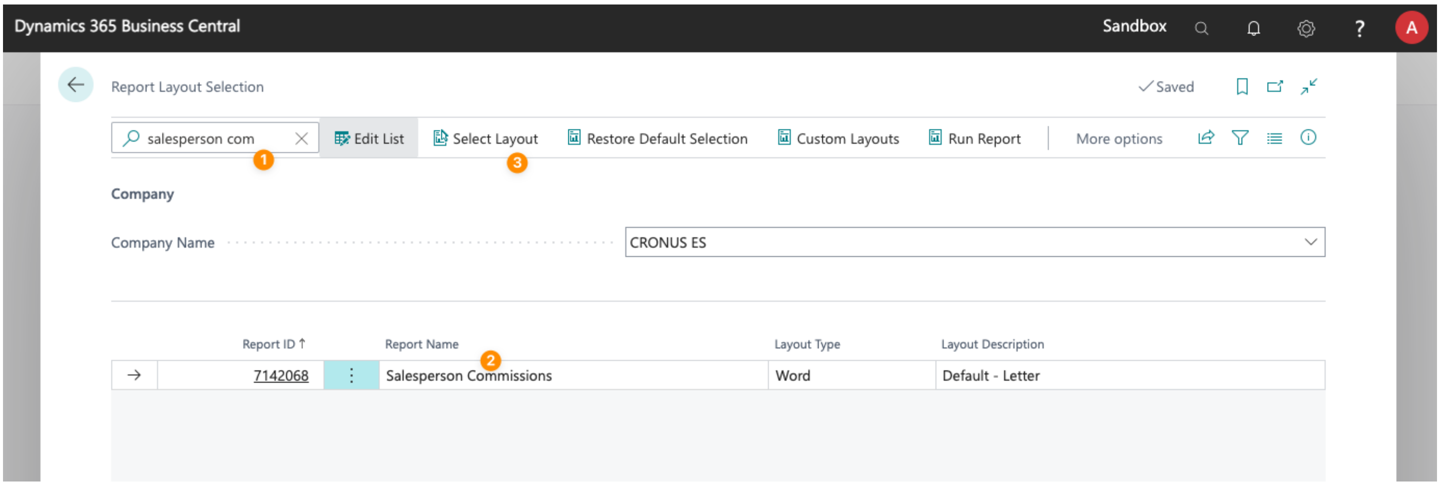



| Post. Date | Description | Customer Name | Sales Amount | Payment Date | Payment Status | Commiss. Amount | Outstanding Commission Amount | Commiss. Status |
|---|---|---|---|---|---|---|---|---|
| 04/01/22 | Invoice 103198 | School of Fine Art | 1,915.40 | 04/30/22 | Unpaid | 191.54 | 191.54 | Pending |
| 04/11/22 | Invoice 103215 | Relecloud | 581.10 | 04/25/22 | Unpaid | 58.11 | 58.11 | Pending |
| 04/11/22 | Invoice 103216 | Trey Research | 3,792.20 | 04/25/22 | Unpaid | 379.22 | 379.22 | Pending |
| 04/11/22 | Invoice 103217 | Alpine Ski House | 11,026.50 | 04/11/22 | Collected | 982.38 | 982.38 | Pending |
| | | Total | 17,315.20 | | | 1,611.25 | 1,611.25 | |

### Change the Selected Layout

To choose between these two layouts (and between A4 or Letter page sizes), navigate to the *Report Layout Selection* page, in Business Central.

Here, you can search for the report name (Salesperson Commissions), select it, and use the *Select Layout* action.

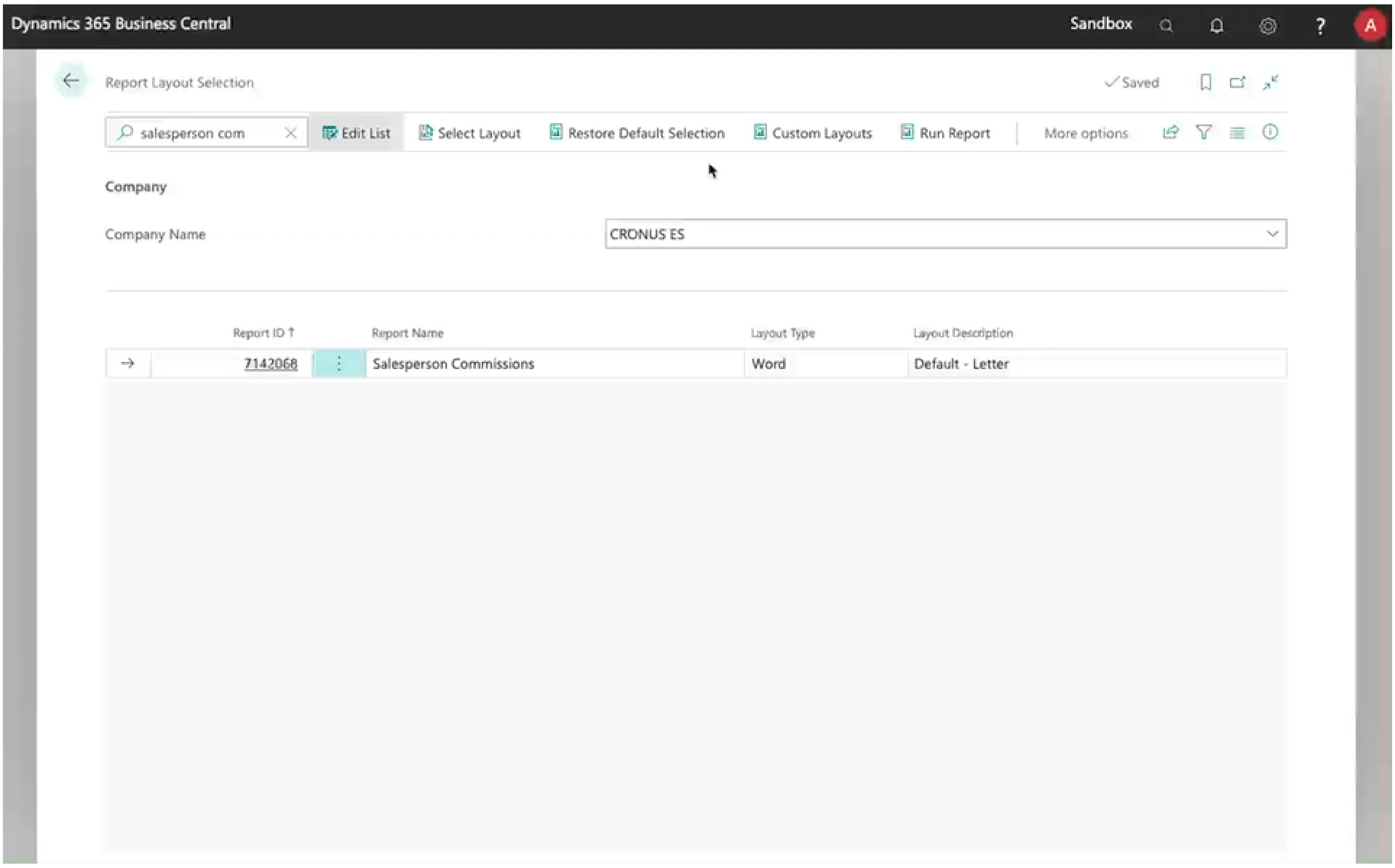



# Customize the Report

While we hope that the two included layouts will be useful as they are, we are sure that many customers will want to adjust them and use the columns (from both layouts) that are more useful to them. Not only that: as something that you will handle to your sales team, you will probably want to add your logo, adapt the colors, etc.

To do so, go to the *Report Layout Selection* page and click on the *Select Layout* action as if you were about to change the default layout.

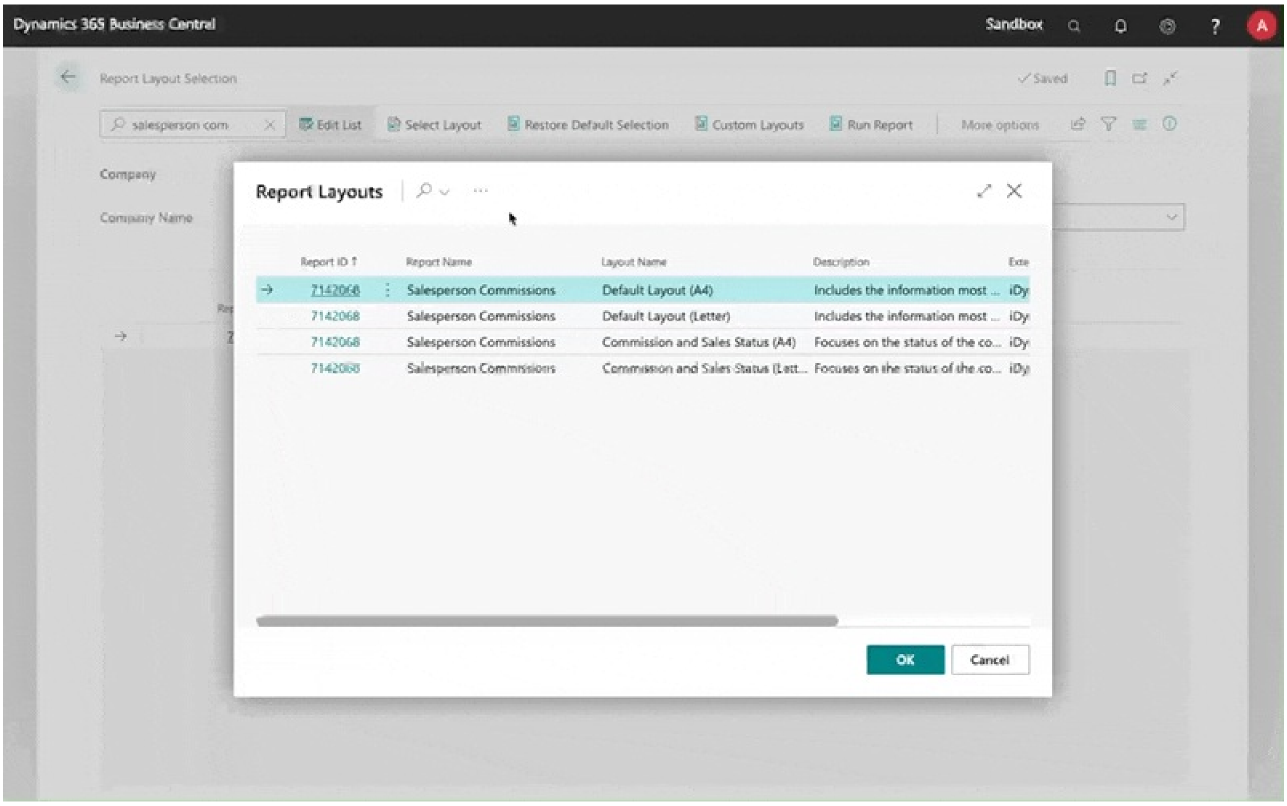
Select the layout that you want to use as the starting point for your own and, from the "..." menu on the top of the page, select the *Export Layout* option. This will download the Word file for you to customize (you can download both available layouts if you want to copy/paste fields from each one).




To start, just change a few colors or fonts on the report (below we will get into adding/removing fields and columns).

Once you have made some small changes to the report, click again in the "..." menu, and choose *New Layout*

In the dialog that will appear, just enter a name and a description for your new report, and be sure to specify that you are going to upload a Word file (in the *Format Options* field). Accept the name and description, and Business Central will ask you to upload the Word file.



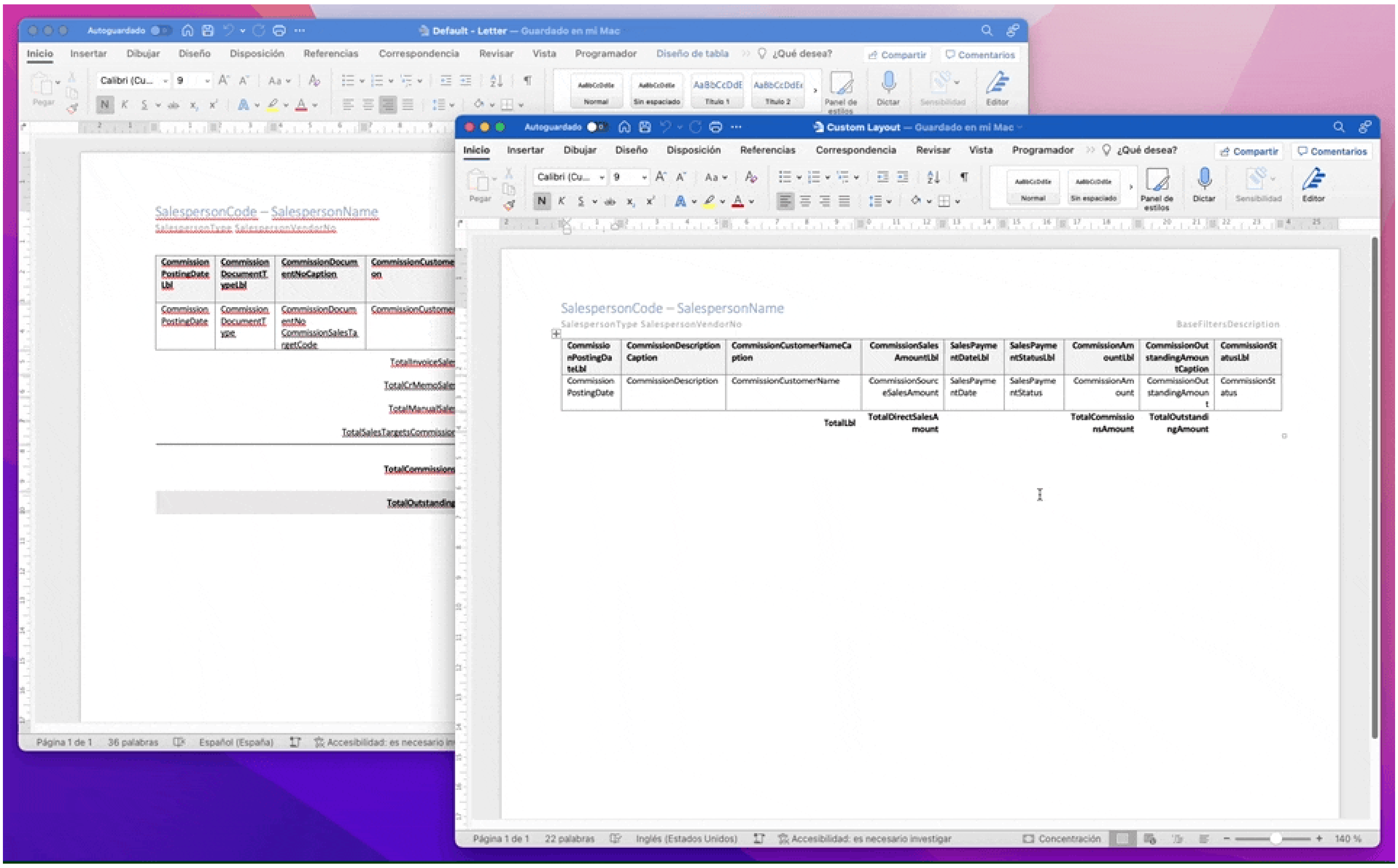

Once the customized layout has been created, you can upload changes to it by using the *Replace Layout* option, in the "..." menu.

Remember to accept the *Select Layout* dialog for the new layout to take effect. Once selected, this layout will be used both when directly running the report and when sending it by email.

## Add or Remove Fields from the Report

When you open the Word file, you will see that a small blue popup appears when you click on any of the fields or labels. The easiest way to rearrange the report is to delete all fields that you don't need (click on the blue popup to be sure that you do delete de field), click on a field that you want to move, and drag the blue popup to its new position in the report.

You can drag and drop from one Word to another, so you could have both base Words downloaded and add fields from both of them into the report.




Be careful not to drag one field on top of another... because Word can be quite temperamental with these things.

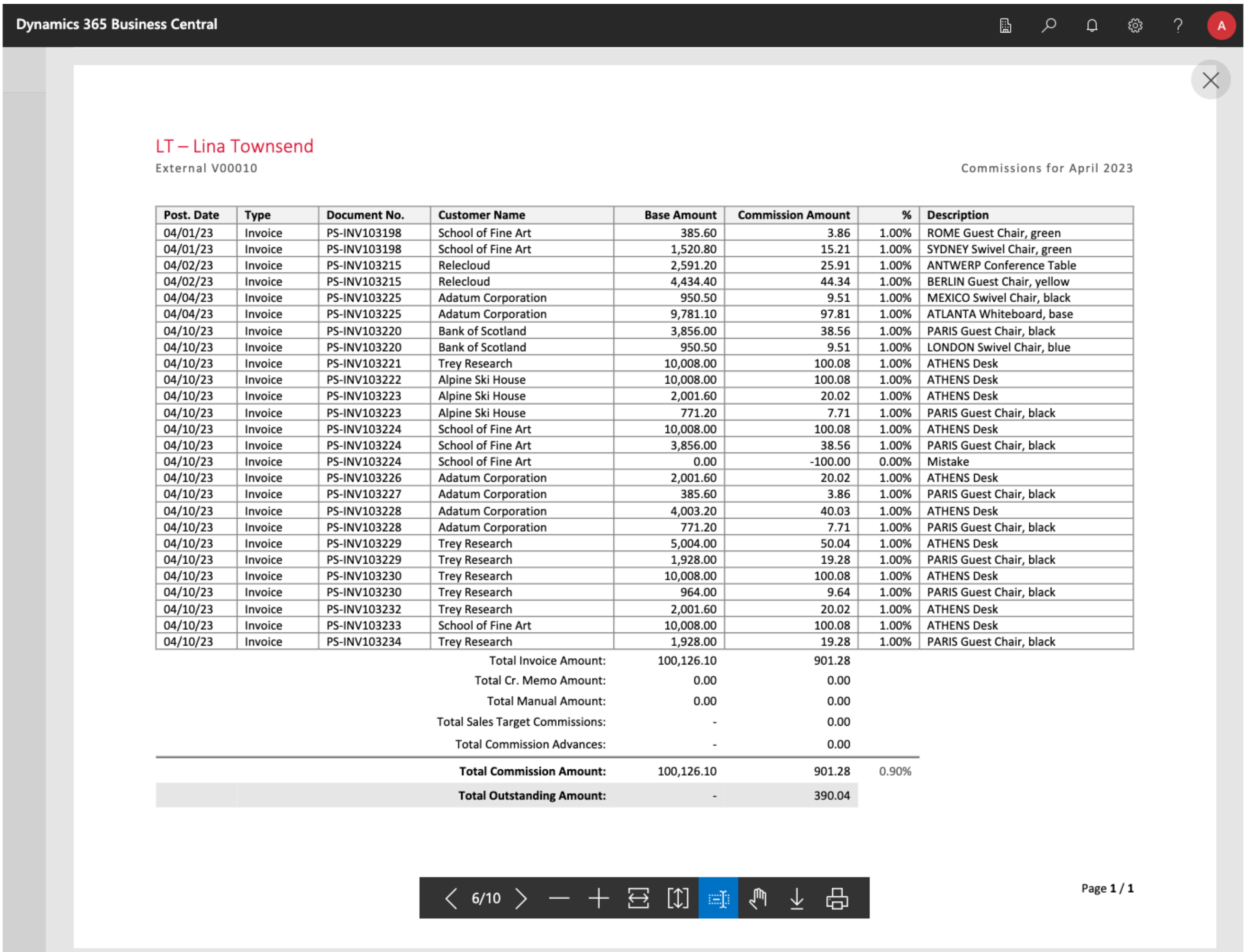
If you are using Word on Windows (this feature is not available on macOS), and feel adventurous, you can also enable the XML Mapping Pane, and add fields manually. See the Microsoft Docs on how to add fields to a Word report for more information. These will let you add all fields included in the report, including some extra fields not included in the default reports.

> **NOTE**
>
> You will notice that all column titles and footers are also variables from Business Central. This is done so that they are automatically translated to the language used in Business Central. If you do not care about being able to generate the report in multiple languages, you can just delete these variables and type the titles and texts that should appear in the report.

# Detailed Salesperson Commissions

## Description

This report is similar to the salesperson commissions report but, for direct commissions, it will show one line for each sales line that achieved commissions, instead of the total by document.


Dynamics 365 Business Central

LT – Lina Townsend

External V00010

Commissions for April 2023

| Post. Date | Type | Document No. | Customer Name | Base Amount | Commission Amount | % | Description |
|---|---|---|---|---|---|---|---|
| 04/01/23 | Invoice | PS-INV103198 | School of Fine Art | 385.60 | 3.86 | 1.00% | ROME Guest Chair, green |
| 04/01/23 | Invoice | PS-INV103198 | School of Fine Art | 1,520.80 | 15.21 | 1.00% | SYDNEY Swivel Chair, green |
| 04/02/23 | Invoice | PS-INV103215 | Relecloud | 2,591.20 | 25.91 | 1.00% | ANTWERP Conference Table |
| 04/02/23 | Invoice | PS-INV103215 | Relecloud | 4,434.40 | 44.34 | 1.00% | BERLIN Guest Chair, yellow |
| 04/04/23 | Invoice | PS-INV103225 | Adatum Corporation | 950.50 | 9.51 | 1.00% | MEXICO Swivel Chair, black |
| 04/04/23 | Invoice | PS-INV103225 | Adatum Corporation | 9,781.10 | 97.81 | 1.00% | ATLANTA Whiteboard, base |
| 04/10/23 | Invoice | PS-INV103220 | Bank of Scotland | 3,856.00 | 38.56 | 1.00% | PARIS Guest Chair, black |
| 04/10/23 | Invoice | PS-INV103220 | Bank of Scotland | 950.50 | 9.51 | 1.00% | LONDON Swivel Chair, blue |
| 04/10/23 | Invoice | PS-INV103221 | Trey Research | 10,008.00 | 100.08 | 1.00% | ATHENS Desk |
| 04/10/23 | Invoice | PS-INV103222 | Alpine Ski House | 10,008.00 | 100.08 | 1.00% | ATHENS Desk |
| 04/10/23 | Invoice | PS-INV103223 | Alpine Ski House | 2,001.60 | 20.02 | 1.00% | ATHENS Desk |
| 04/10/23 | Invoice | PS-INV103223 | Alpine Ski House | 771.20 | 7.71 | 1.00% | PARIS Guest Chair, black |
| 04/10/23 | Invoice | PS-INV103224 | School of Fine Art | 10,008.00 | 100.08 | 1.00% | ATHENS Desk |
| 04/10/23 | Invoice | PS-INV103224 | School of Fine Art | 3,856.00 | 38.56 | 1.00% | PARIS Guest Chair, black |
| 04/10/23 | Invoice | PS-INV103224 | School of Fine Art | 0.00 | -100.00 | 0.00% | Mistake |
| 04/10/23 | Invoice | PS-INV103226 | Adatum Corporation | 2,001.60 | 20.02 | 1.00% | ATHENS Desk |
| 04/10/23 | Invoice | PS-INV103227 | Adatum Corporation | 385.60 | 3.86 | 1.00% | PARIS Guest Chair, black |
| 04/10/23 | Invoice | PS-INV103228 | Adatum Corporation | 4,003.20 | 40.03 | 1.00% | ATHENS Desk |
| 04/10/23 | Invoice | PS-INV103228 | Adatum Corporation | 771.20 | 7.71 | 1.00% | PARIS Guest Chair, black |
| 04/10/23 | Invoice | PS-INV103229 | Trey Research | 5,004.00 | 50.04 | 1.00% | ATHENS Desk |
| 04/10/23 | Invoice | PS-INV103229 | Trey Research | 1,928.00 | 19.28 | 1.00% | PARIS Guest Chair, black |
| 04/10/23 | Invoice | PS-INV103230 | Trey Research | 10,008.00 | 100.08 | 1.00% | ATHENS Desk |
| 04/10/23 | Invoice | PS-INV103230 | Trey Research | 964.00 | 9.64 | 1.00% | PARIS Guest Chair, black |
| 04/10/23 | Invoice | PS-INV103232 | Trey Research | 2,001.60 | 20.02 | 1.00% | ATHENS Desk |
| 04/10/23 | Invoice | PS-INV103233 | School of Fine Art | 10,008.00 | 100.08 | 1.00% | ATHENS Desk |
| 04/10/23 | Invoice | PS-INV103234 | Trey Research | 1,928.00 | 19.28 | 1.00% | PARIS Guest Chair, black |

| | | | |
|---|---|---|---|
| Total Invoice Amount: | 100,126.10 | 901.28 | |
| Total Cr. Memo Amount: | 0.00 | 0.00 | |
| Total Manual Amount: | 0.00 | 0.00 | |
| Total Sales Target Commissions: | - | 0.00 | |
| Total Commission Advances: | - | 0.00 | |
| **Total Commission Amount:** | 100,126.10 | 901.28 | 0.90% |
| **Total Outstanding Amount:** | - | 390.04 | |

6/10

Page 1 / 1

## Included Layouts and Customization

Like the salesperson commissions report, this report has been designed in Word, so that it can be easily customized by customers, and includes both a default layout and an alternative one that shows the payment status of the source document.

Dynamics 365 Business Central

## BC – Benjamin Chiu

Internal

Commissions for April 2023

| Post. Date | Description | Customer Name | Base Amount | Payment Date | Payment Status | Commission Amount | Commiss. Status |
|---|---|---|---|---|---|---|---|
| 04/10/23 | PARIS Guest Chair, black | Bank of Scotland | 3,856.00 | 05/10/23 | Unpaid | 192.80 | Pending |
| 04/10/23 | LONDON Swivel Chair, blue | Bank of Scotland | 950.50 | 05/10/23 | Unpaid | 47.53 | Pending |
| 04/10/23 | ATHENS Desk | Alpine Ski House | 10,008.00 | 05/10/23 | Unpaid | 200.16 | Pending |
| 04/10/23 | ATHENS Desk | Alpine Ski House | 2,001.60 | 05/10/23 | Unpaid | 10.01 | Pending |
| 04/10/23 | PARIS Guest Chair, black | Alpine Ski House | 771.20 | 05/10/23 | Unpaid | 3.86 | Pending |
| 04/10/23 | ATHENS Desk | School of Fine Art | 10,008.00 | 04/30/23 | Unpaid | 300.24 | Pending |
| 04/10/23 | PARIS Guest Chair, black | School of Fine Art | 3,856.00 | 04/30/23 | Unpaid | 115.68 | Pending |
| 04/10/23 | ATHENS Desk | Adatum Corporation | 2,001.60 | 05/10/23 | Unpaid | 100.08 | Pending |
| 04/10/23 | PARIS Guest Chair, black | Adatum Corporation | 385.60 | 05/10/23 | Unpaid | 19.28 | Pending |
| 04/10/23 | ATHENS Desk | Adatum Corporation | 4,003.20 | 05/10/23 | Unpaid | 200.16 | Pending |
| 04/10/23 | PARIS Guest Chair, black | Adatum Corporation | 771.20 | 05/10/23 | Unpaid | 38.56 | Pending |
| 04/10/23 | ATHENS Desk | Trey Research | 2,001.60 | 04/24/23 | Unpaid | 10.01 | Pending |
| | | **Total** | **40,614.50** | | | **1,238.37** | |

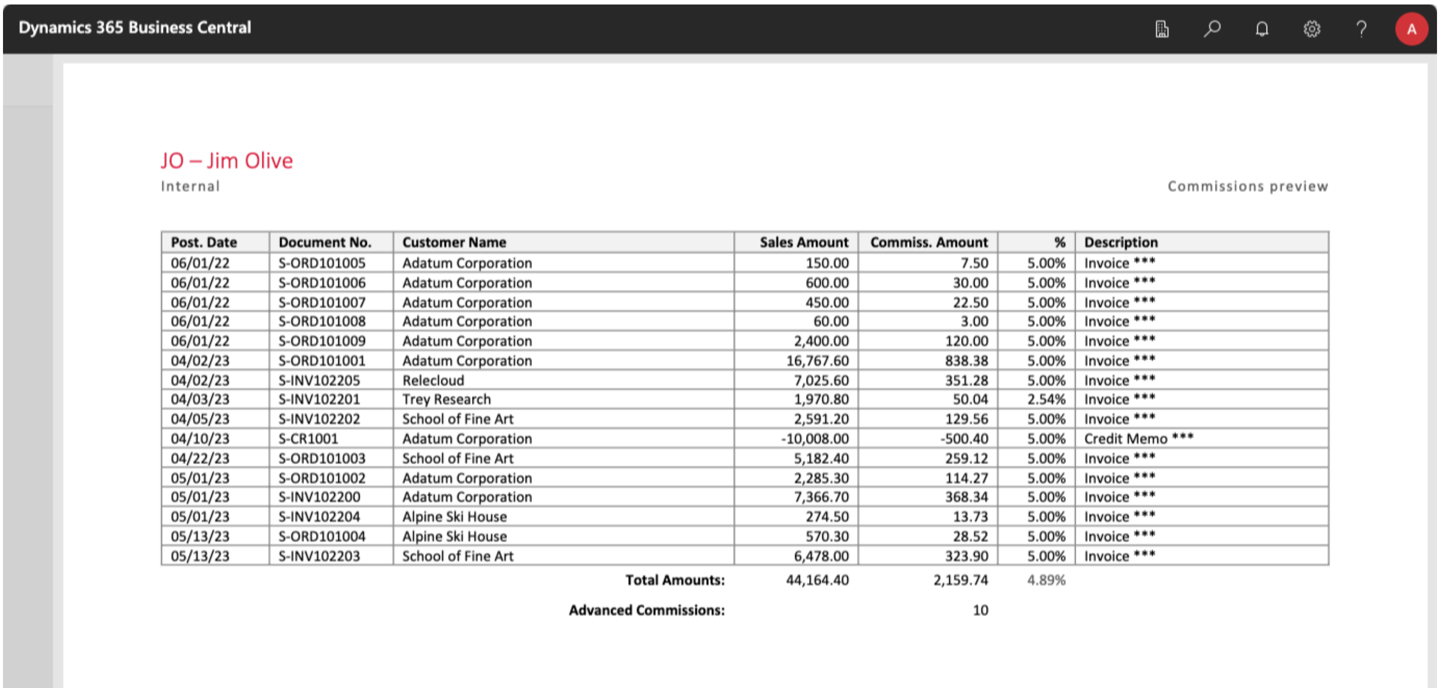
# Preview Expected Commissions

## Description

At any moment you can get a report of the commissions currently expected for all sales documents that have not yet been posted. These reports can be found on the Commission Entries list, as well as in the *Reports* action bar of sales orders, sales invoices or sales quotes.

## Expected Commissions by Sales Document

This report is equivalent to the commissions by salesperson report but will show the commissions expected for sales documents that have not yet been posted. As with the mentioned report, you can customize this report using Word, or send it by email to your salespeople.


Dynamics 365 Business Central

JO – Jim Olive

Internal

Commissions preview

| Post. Date | Document No. | Customer Name | Sales Amount | Commiss. Amount | % | Description |
|---|---|---|---|---|---|---|
| 06/01/22 | S-ORD101005 | Adatum Corporation | 150.00 | 7.50 | 5.00% | Invoice *** |
| 06/01/22 | S-ORD101006 | Adatum Corporation | 600.00 | 30.00 | 5.00% | Invoice *** |
| 06/01/22 | S-ORD101007 | Adatum Corporation | 450.00 | 22.50 | 5.00% | Invoice *** |
| 06/01/22 | S-ORD101008 | Adatum Corporation | 60.00 | 3.00 | 5.00% | Invoice *** |
| 06/01/22 | S-ORD101009 | Adatum Corporation | 2,400.00 | 120.00 | 5.00% | Invoice *** |
| 04/02/23 | S-ORD101001 | Adatum Corporation | 16,767.60 | 838.38 | 5.00% | Invoice *** |
| 04/02/23 | S-INV102205 | Relecloud | 7,025.60 | 351.28 | 5.00% | Invoice *** |
| 04/03/23 | S-INV102201 | Trey Research | 1,970.80 | 50.04 | 2.54% | Invoice *** |
| 04/05/23 | S-INV102202 | School of Fine Art | 2,591.20 | 129.56 | 5.00% | Invoice *** |
| 04/10/23 | S-CR1001 | Adatum Corporation | -10,008.00 | -500.40 | 5.00% | Credit Memo *** |
| 04/22/23 | S-ORD101003 | School of Fine Art | 5,182.40 | 259.12 | 5.00% | Invoice *** |
| 05/01/23 | S-ORD101002 | Adatum Corporation | 2,285.30 | 114.27 | 5.00% | Invoice *** |
| 05/01/23 | S-INV102200 | Adatum Corporation | 7,366.70 | 368.34 | 5.00% | Invoice *** |
| 05/01/23 | S-INV102204 | Alpine Ski House | 274.50 | 13.73 | 5.00% | Invoice *** |
| 05/13/23 | S-ORD101004 | Alpine Ski House | 570.30 | 28.52 | 5.00% | Invoice *** |
| 05/13/23 | S-INV102203 | School of Fine Art | 6,478.00 | 323.90 | 5.00% | Invoice *** |
| | | **Total Amounts:** | 44,164.40 | 2,159.74 | 4.89% | |
| | | **Advanced Commissions:** | | 10 | | |

## Expected Commissions by Sales Line

This report is equivalent to the detailed commissions by salesperson report but shows the commissions expected for sales lines in documents that have not yet been posted.

Dynamics 365 Business Central

## JO – Jim Olive

Internal

Detailed commissions preview

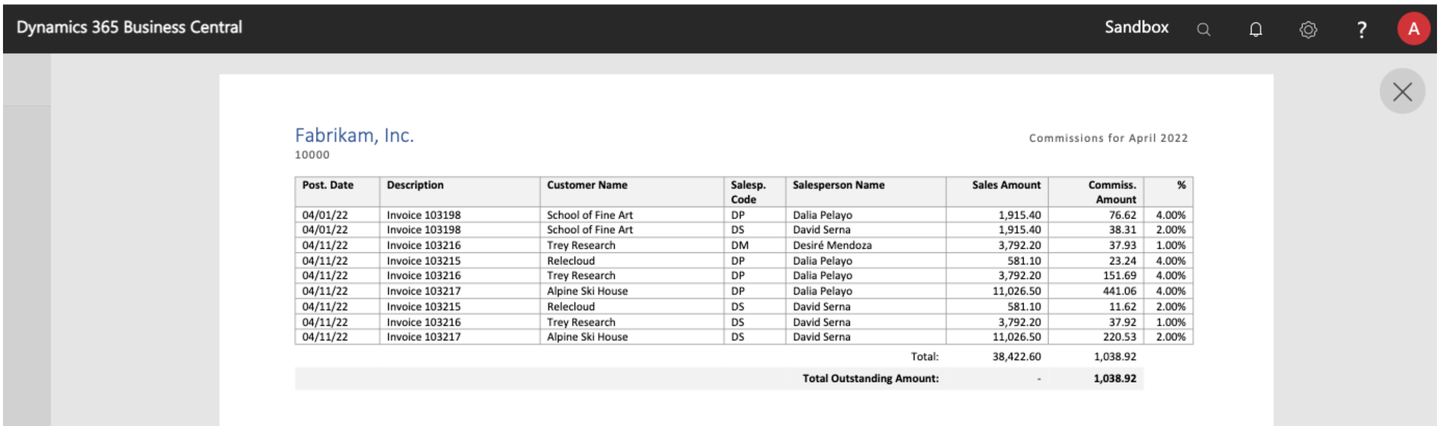
| Post. Date | Document No. | Customer Name | Base Amount | Commission Amount | % | Description |
|---|---|---|---|---|---|---|
| 06/01/22 | S-ORD101005 | Adatum Corporation | 150.00 | 7.50 | 5.00% | Whole Roasted Beans, Brazil |
| 06/01/22 | S-ORD101006 | Adatum Corporation | 300.00 | 15.00 | 5.00% | Whole Roasted Beans, Colombia |
| 06/01/22 | S-ORD101006 | Adatum Corporation | 300.00 | 15.00 | 5.00% | Whole Roasted Beans, Brazil |
| 06/01/22 | S-ORD101007 | Adatum Corporation | 450.00 | 22.50 | 5.00% | Whole Roasted Beans, Colombia |
| 06/01/22 | S-ORD101008 | Adatum Corporation | 30.00 | 1.50 | 5.00% | Whole Roasted Beans, Colombia |
| 06/01/22 | S-ORD101008 | Adatum Corporation | 30.00 | 1.50 | 5.00% | Whole Roasted Beans, Brazil |
| 06/01/22 | S-ORD101009 | Adatum Corporation | 2,400.00 | 120.00 | 5.00% | S-100 Semi-Automatic |
| 04/02/23 | S-ORD101001 | Adatum Corporation | 16,767.60 | 838.38 | 5.00% | ATLANTA Whiteboard, base |
| 04/02/23 | S-INV102205 | Relecloud | 2,591.20 | 129.56 | 5.00% | ANTWERP Conference Table |
| 04/02/23 | S-INV102205 | Relecloud | 4,434.40 | 221.72 | 5.00% | BERLIN Guest Chair, yellow |
| 04/03/23 | S-INV102201 | Trey Research | 1,000.80 | 50.04 | 5.00% | ATHENS Desk |
| 04/05/23 | S-INV102202 | School of Fine Art | 2,591.20 | 129.56 | 5.00% | ANTWERP Conference Table |
| 04/10/23 | S-CR1001 | Adatum Corporation | -10,008.00 | -500.40 | 5.00% | ATHENS Desk |
| 04/22/23 | S-ORD101003 | School of Fine Art | 5,182.40 | 259.12 | 5.00% | ANTWERP Conference Table |
| 05/01/23 | S-ORD101002 | Adatum Corporation | 1,901.00 | 95.05 | 5.00% | MEXICO Swivel Chair, black |
| 05/01/23 | S-ORD101002 | Adatum Corporation | 384.30 | 19.22 | 5.00% | AMSTERDAM Lamp |
| 05/01/23 | S-INV102200 | Adatum Corporation | 380.20 | 19.01 | 5.00% | SYDNEY Swivel Chair, green |
| 05/01/23 | S-INV102200 | Adatum Corporation | 6,986.50 | 349.33 | 5.00% | ATLANTA Whiteboard, base |
| 05/01/23 | S-INV102204 | Alpine Ski House | 274.50 | 13.73 | 5.00% | AMSTERDAM Lamp |
| 05/13/23 | S-ORD101004 | Alpine Ski House | 570.30 | 28.52 | 5.00% | SYDNEY Swivel Chair, green |
| 05/13/23 | S-INV102203 | School of Fine Art | 6,478.00 | 323.90 | 5.00% | ANTWERP Conference Table |
| | | **Total Amounts:** | 43,194.40 | 2,159.74 | 5.00% | |
| | | **Advanced Commissions:** | | 10 | | |

# Vendor Commissions Report

## Description

This report includes all commissions for a period (this month, last month, a specific date range) or all commissions that are pending settlement. The report is quite similar to the salesperson commissions report, with one key difference: this report groups commissions by vendor.

Available in the *Report* menu in the action bar of the *Vendor* list, this report is designed for companies that have part of their sales team externalized to one or more vendors that provide salespeople, and want to give a complete report of all commissions to be paid to all salespeople assigned to the vendor.



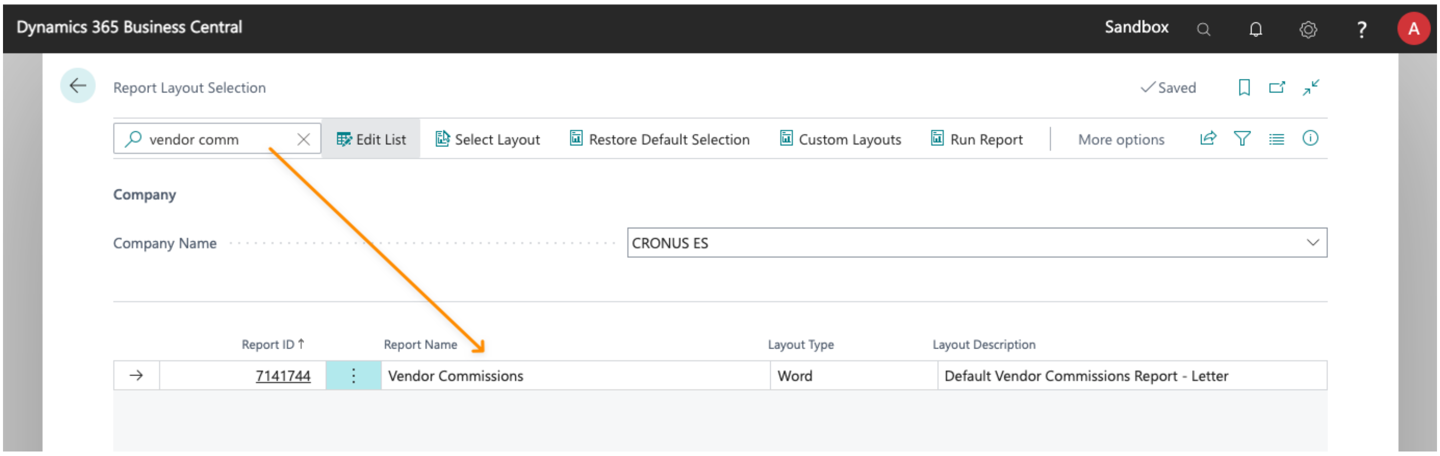
Fabrikam, Inc.
10000

Commissions for April 2022

| Post. Date | Description | Customer Name | Salesp. Code | Salesperson Name | Sales Amount | Commiss. Amount | % |
|---|---|---|---|---|---|---|---|
| 04/01/22 | Invoice 103198 | School of Fine Art | DP | Dalia Pelayo | 1,915.40 | 76.62 | 4.00% |
| 04/01/22 | Invoice 103198 | School of Fine Art | DS | David Serna | 1,915.40 | 38.31 | 2.00% |
| 04/11/22 | Invoice 103216 | Trey Research | DM | Desiré Mendoza | 3,792.20 | 37.93 | 1.00% |
| 04/11/22 | Invoice 103215 | Relecloud | DP | Dalia Pelayo | 581.10 | 23.24 | 4.00% |
| 04/11/22 | Invoice 103216 | Trey Research | DP | Dalia Pelayo | 3,792.20 | 151.69 | 4.00% |
| 04/11/22 | Invoice 103217 | Alpine Ski House | DP | Dalia Pelayo | 11,026.50 | 441.06 | 4.00% |
| 04/11/22 | Invoice 103215 | Relecloud | DS | David Serna | 581.10 | 11.62 | 2.00% |
| 04/11/22 | Invoice 103216 | Trey Research | DS | David Serna | 3,792.20 | 37.92 | 1.00% |
| 04/11/22 | Invoice 103217 | Alpine Ski House | DS | David Serna | 11,026.50 | 220.53 | 2.00% |
| | | | | Total: | 38,422.60 | 1,038.92 | |
| | | | | **Total Outstanding Amount:** | - | **1,038.92** | |

## Customize the Report

This report is given in Word format and can be easily customized, check the salesperson commissions report, in order to learn how to customize it (everything will be the same, the only difference being that this is the *Vendor Commissions* report).

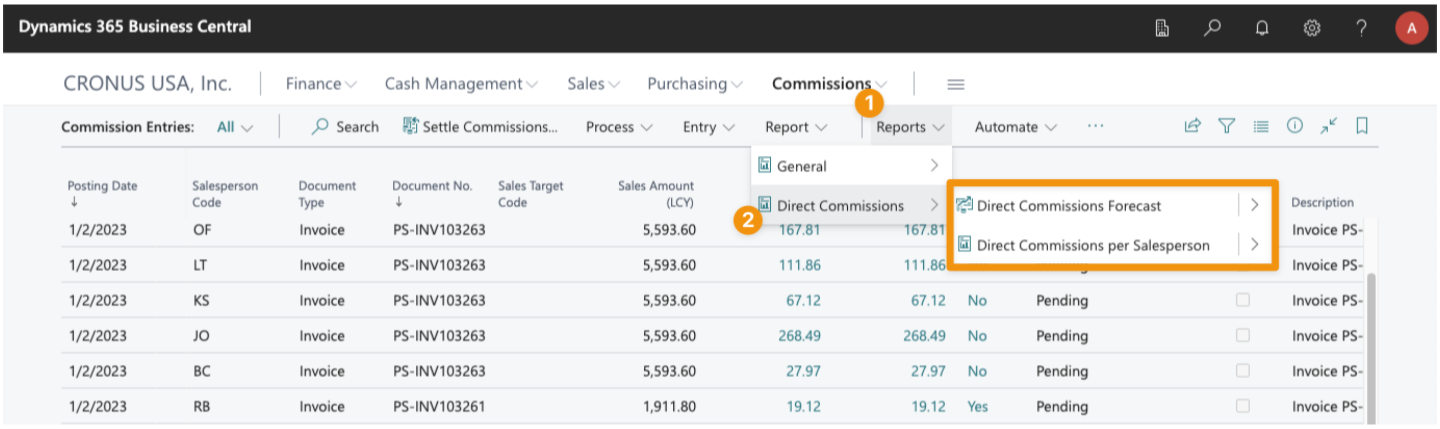


# Direct Commissions Reports

## Description

We consider *direct commissions* all that were generated when a sales document was posted, as well as any commissions entered manually (or imported) into the app. These reports will give you information about which commissions are pending to be settled, information on all generated direct commissions, and check the collection status of each sales document if commission payment depends on it.

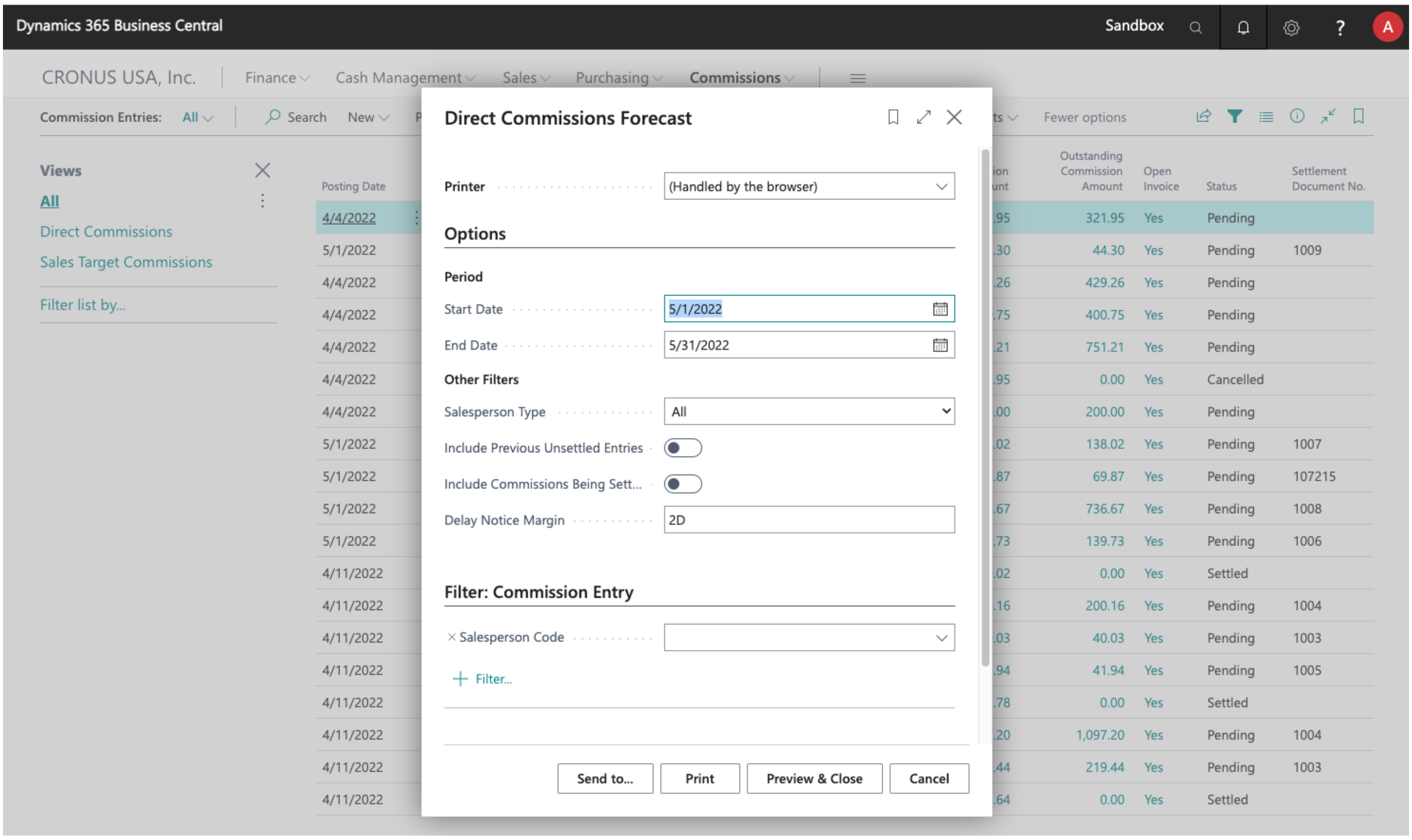
The reports detailed here can be found in the *Reports* > *Direct Commissions* menu, in the action bar of both the *Salespeople/Purchasers* and *Commission Entries* lists, inside *More actions...*




## Direct Commissions Forecast

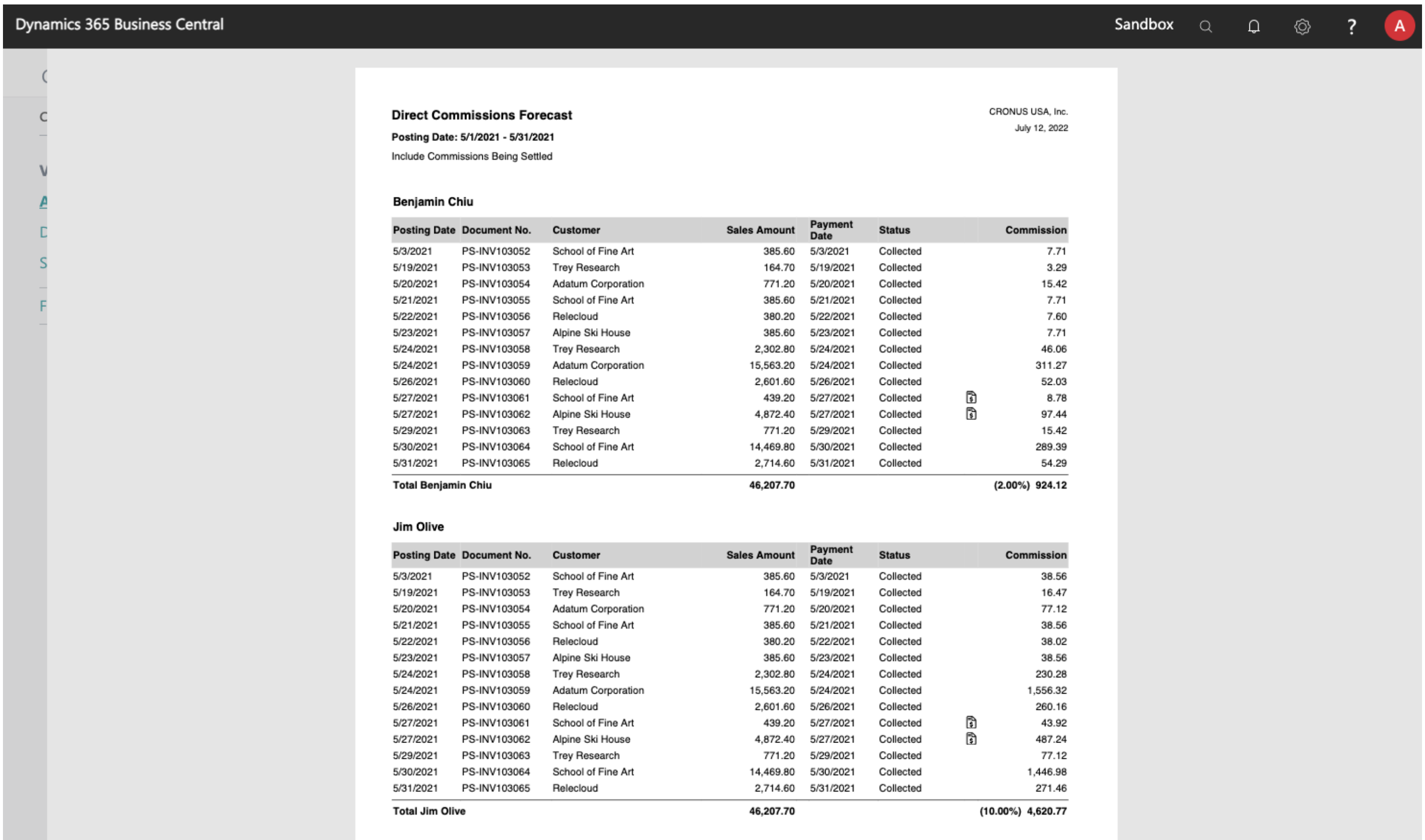
This report gives us a forecast of which direct commissions will have to be paid in a particular period. Note that depending on what you have configured, commissions can be paid once the sales invoice has been issued, or after the sales invoice has been fully collected.

If your company pays commissions only after the source invoice has been collected, this report will be particularly useful, as it will show you all invoices that should have been collected in the selected period, showing you their actual status (paid, pending, unpaid). When the report is run, you can specify how many days a payment date must be overdue before an invoice goes from *pending* - the customer has not yet paid the invoice but either the specified expected payment date is in the future or within margin, to *unpaid* - the customer should have paid the invoice by that point.



Most of the options shown are self-explanatory, but there are a couple of them that might require a bit more information:

- **Include Previous Unsettled Entries.** If checked, the report will include not only those commissions that are expected to be paid in the selected period but also those that should have been paid on previous dates but have not. This is useful, for example, if you pay commissions after the source document has been collected. If that is the case, there might be commissions that were not paid in a previous period, because the customer did not pay on time, but might be collected (and thus commissions paid) during the selected period.
- **Exclude Unpaid.** Only available when commissions are settled/paid after the invoice has been collected. This option lets you exclude from the forecast those invoices that are still unpaid after the configurable margin.




**Direct Commissions Forecast**

**Posting Date: 5/1/2021 - 5/31/2021**

Include Commissions Being Settled

CRONUS USA, Inc.
July 12, 2022

**Benjamin Chiu**

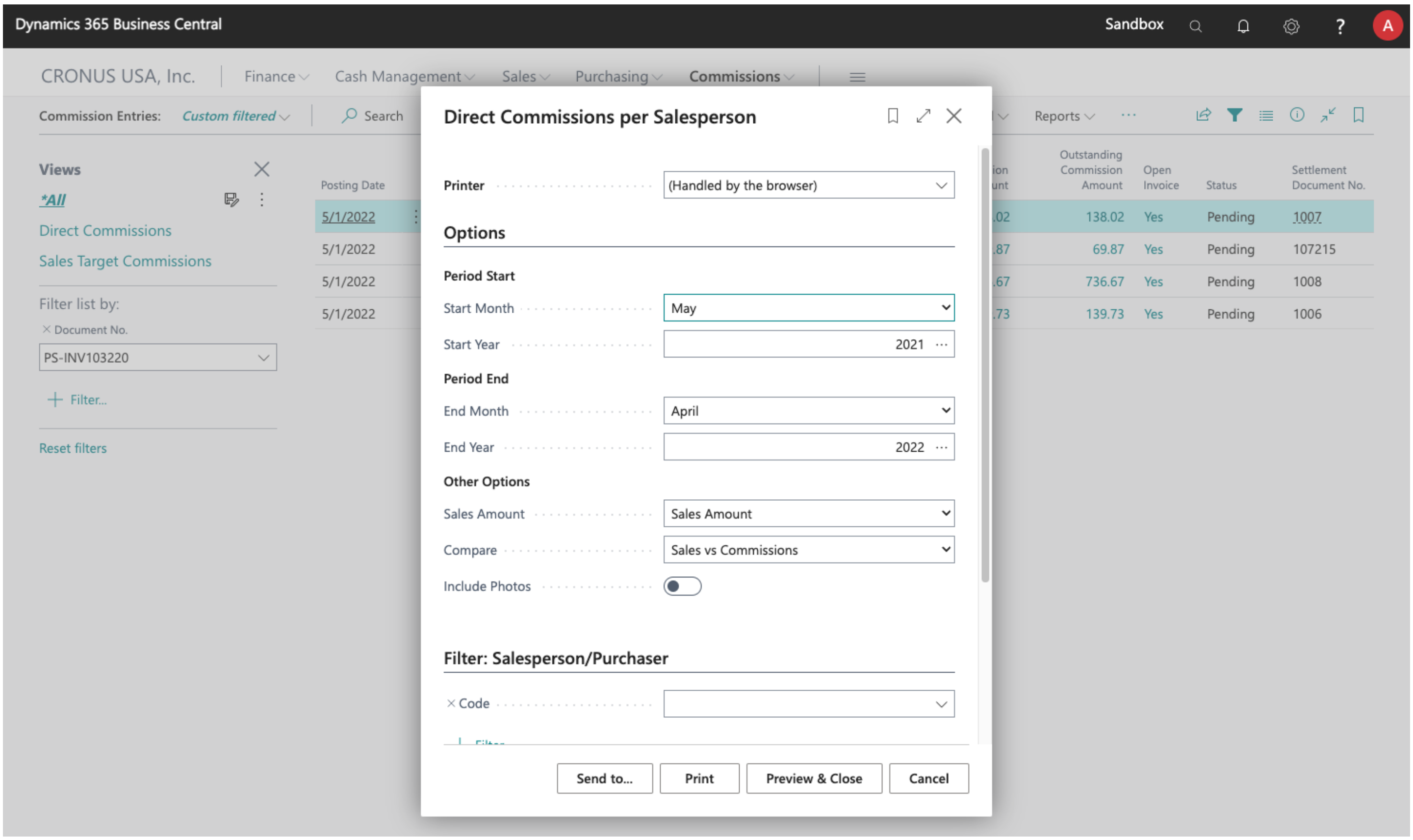
| Posting Date | Document No. | Customer | Sales Amount | Payment Date | Status | Commission |
|---|---|---|---|---|---|---|
| 5/3/2021 | PS-INV103052 | School of Fine Art | 385.60 | 5/3/2021 | Collected | 7.71 |
| 5/19/2021 | PS-INV103053 | Trey Research | 164.70 | 5/19/2021 | Collected | 3.29 |
| 5/20/2021 | PS-INV103054 | Adatum Corporation | 771.20 | 5/20/2021 | Collected | 15.42 |
| 5/21/2021 | PS-INV103055 | School of Fine Art | 385.60 | 5/21/2021 | Collected | 7.71 |
| 5/22/2021 | PS-INV103056 | Relecloud | 380.20 | 5/22/2021 | Collected | 7.60 |
| 5/23/2021 | PS-INV103057 | Alpine Ski House | 385.60 | 5/23/2021 | Collected | 7.71 |
| 5/24/2021 | PS-INV103058 | Trey Research | 2,302.80 | 5/24/2021 | Collected | 46.06 |
| 5/24/2021 | PS-INV103059 | Adatum Corporation | 15,563.20 | 5/24/2021 | Collected | 311.27 |
| 5/26/2021 | PS-INV103060 | Relecloud | 2,601.60 | 5/26/2021 | Collected | 52.03 |
| 5/27/2021 | PS-INV103061 | School of Fine Art | 439.20 | 5/27/2021 | Collected | 8.78 |
| 5/27/2021 | PS-INV103062 | Alpine Ski House | 4,872.40 | 5/27/2021 | Collected | 97.44 |
| 5/29/2021 | PS-INV103063 | Trey Research | 771.20 | 5/29/2021 | Collected | 15.42 |
| 5/30/2021 | PS-INV103064 | School of Fine Art | 14,469.80 | 5/30/2021 | Collected | 289.39 |
| 5/31/2021 | PS-INV103065 | Relecloud | 2,714.60 | 5/31/2021 | Collected | 54.29 |
| **Total Benjamin Chiu** | | | **46,207.70** | | | **(2.00%) 924.12** |

**Jim Olive**

| Posting Date | Document No. | Customer | Sales Amount | Payment Date | Status | Commission |
|---|---|---|---|---|---|---|
| 5/3/2021 | PS-INV103052 | School of Fine Art | 385.60 | 5/3/2021 | Collected | 38.56 |
| 5/19/2021 | PS-INV103053 | Trey Research | 164.70 | 5/19/2021 | Collected | 16.47 |
| 5/20/2021 | PS-INV103054 | Adatum Corporation | 771.20 | 5/20/2021 | Collected | 77.12 |
| 5/21/2021 | PS-INV103055 | School of Fine Art | 385.60 | 5/21/2021 | Collected | 38.56 |
| 5/22/2021 | PS-INV103056 | Relecloud | 380.20 | 5/22/2021 | Collected | 38.02 |
| 5/23/2021 | PS-INV103057 | Alpine Ski House | 385.60 | 5/23/2021 | Collected | 38.56 |
| 5/24/2021 | PS-INV103058 | Trey Research | 2,302.80 | 5/24/2021 | Collected | 230.28 |
| 5/24/2021 | PS-INV103059 | Adatum Corporation | 15,563.20 | 5/24/2021 | Collected | 1,556.32 |
| 5/26/2021 | PS-INV103060 | Relecloud | 2,601.60 | 5/26/2021 | Collected | 260.16 |
| 5/27/2021 | PS-INV103061 | School of Fine Art | 439.20 | 5/27/2021 | Collected | 43.92 |
| 5/27/2021 | PS-INV103062 | Alpine Ski House | 4,872.40 | 5/27/2021 | Collected | 487.24 |
| 5/29/2021 | PS-INV103063 | Trey Research | 771.20 | 5/29/2021 | Collected | 77.12 |
| 5/30/2021 | PS-INV103064 | School of Fine Art | 14,469.80 | 5/30/2021 | Collected | 1,446.98 |
| 5/31/2021 | PS-INV103065 | Relecloud | 2,714.60 | 5/31/2021 | Collected | 271.46 |
| **Total Jim Olive** | | | **46,207.70** | | | **(10.00%) 4,620.77** |

# Direct Commissions per Salesperson

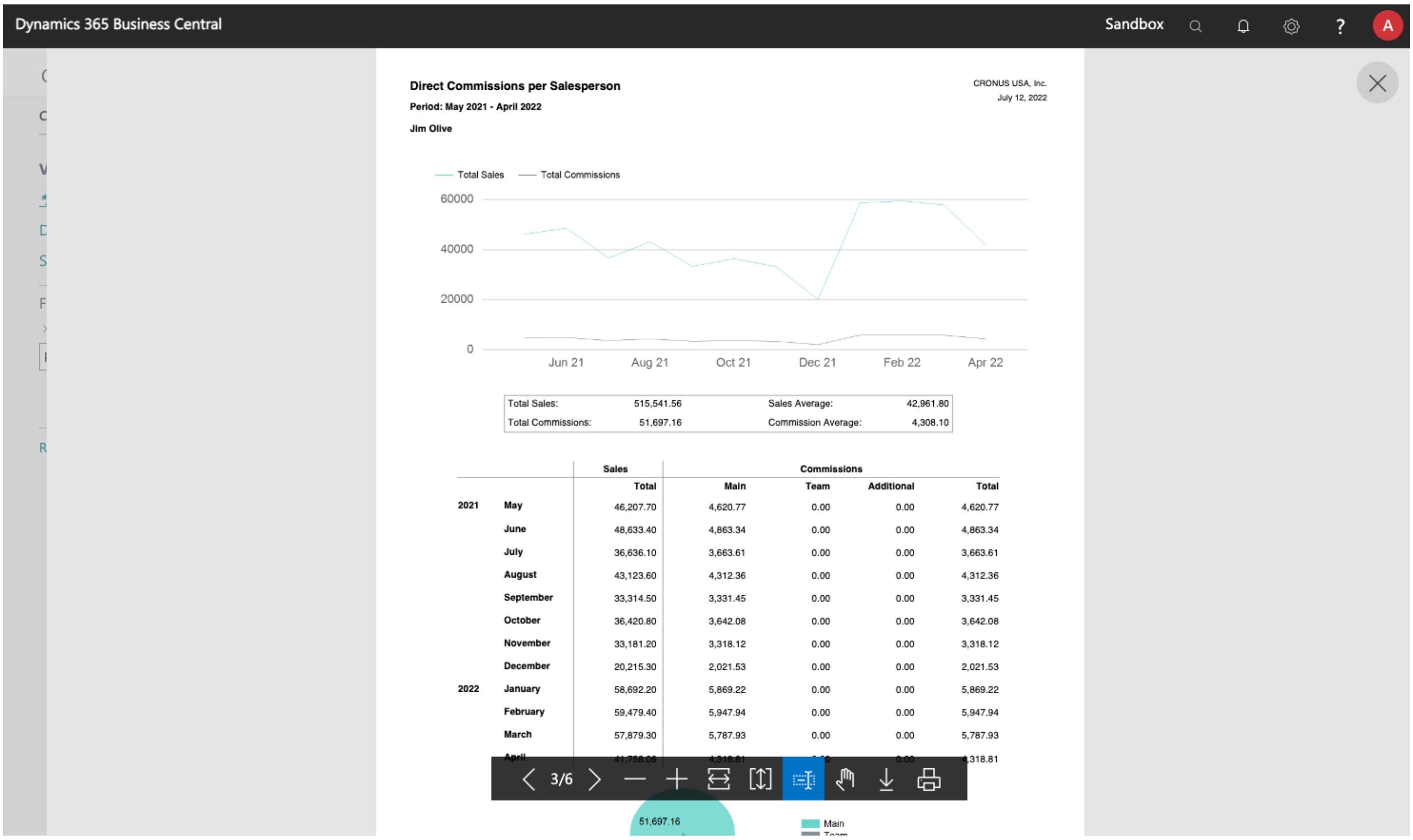
This report gives an overview of all sales and direct commissions generated by a single salesperson during a time period, letting you see how both amounts have evolved in time.




When the report is run, you must specify the start and end months for the period for which the data will be shown. In addition to the basic filters available, the report gives you the option to specify **what you want to compare**. Depending on which of the two values you choose, the actual charts and data shown will be different.

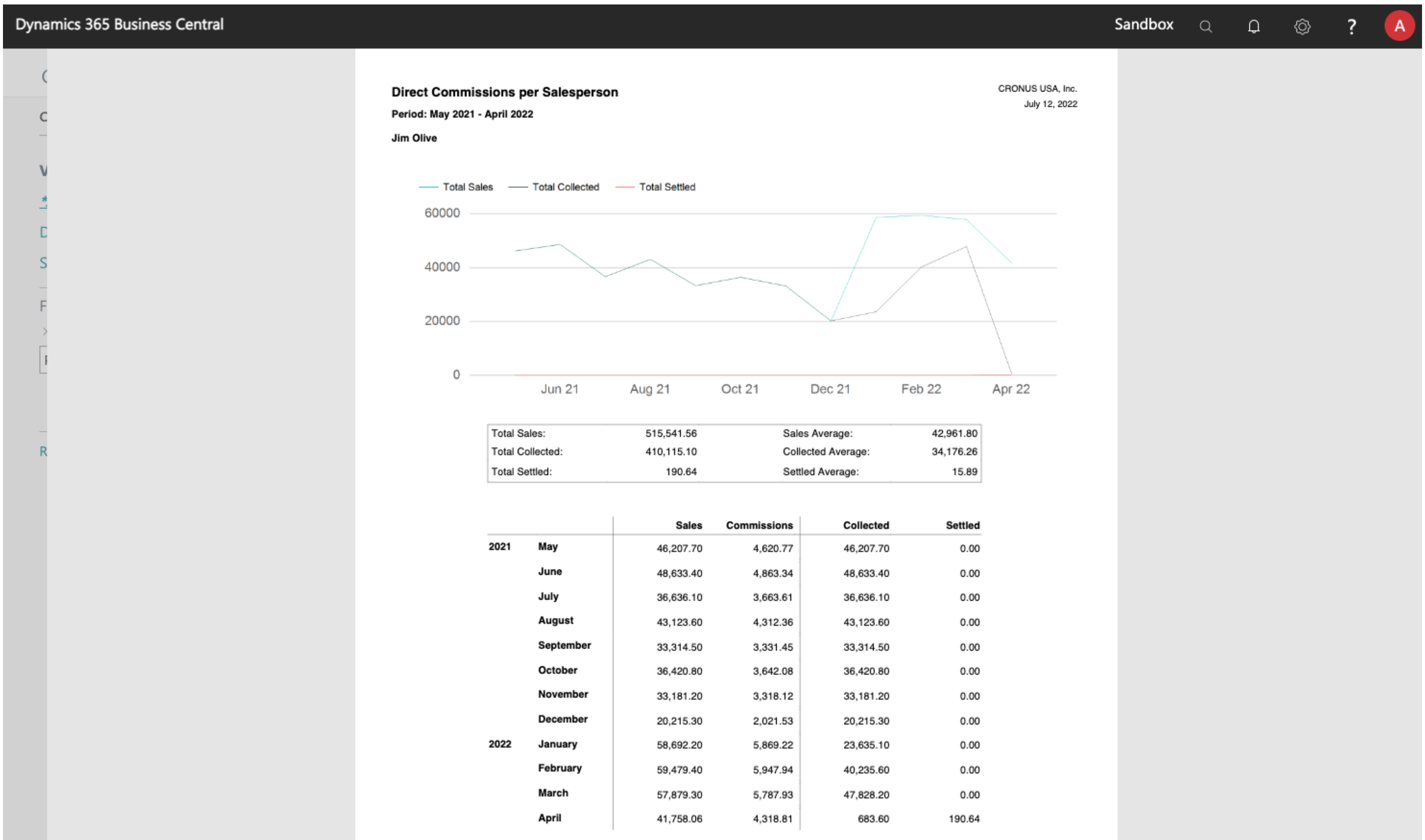
### Sales vs Commissions

This option compares the total amount of sales, posted each month by the salesperson, with the total amount of commissions generated by these sales. It also details whether those sales are due to the salesperson being the main salesperson assigned to the sales document, part of their team, or an additional salesperson that also took part in the sale.




### Sales vs Settlements

This option compares the total amount of sales with the total settled (that is, paid to the salesperson) commission amount. In addition, it also shows the actual amounts collected from customers.




**Direct Commissions per Salesperson**

**Period: May 2021 - April 2022**

**Jim Olive**

CRONUS USA, Inc.
July 12, 2022

| | | | |
|---|---|---|---|
| Total Sales: | 515,541.56 | Sales Average: | 42,961.80 |
| Total Collected: | 410,115.10 | Collected Average: | 34,176.26 |
| Total Settled: | 190.64 | Settled Average: | 15.89 |

| | | Sales | Commissions | Collected | Settled |
|---|---|---|---|---|---|
| **2021** | **May** | 46,207.70 | 4,620.77 | 46,207.70 | 0.00 |
| | **June** | 48,633.40 | 4,863.34 | 48,633.40 | 0.00 |
| | **July** | 36,636.10 | 3,663.61 | 36,636.10 | 0.00 |
| | **August** | 43,123.60 | 4,312.36 | 43,123.60 | 0.00 |
| | **September** | 33,314.50 | 3,331.45 | 33,314.50 | 0.00 |
| | **October** | 36,420.80 | 3,642.08 | 36,420.80 | 0.00 |
| | **November** | 33,181.20 | 3,318.12 | 33,181.20 | 0.00 |
| | **December** | 20,215.30 | 2,021.53 | 20,215.30 | 0.00 |
| **2022** | **January** | 58,692.20 | 5,869.22 | 23,635.10 | 0.00 |
| | **February** | 59,479.40 | 5,947.94 | 40,235.60 | 0.00 |
| | **March** | 57,879.30 | 5,787.93 | 47,828.20 | 0.00 |
| | **April** | 41,758.06 | 4,318.81 | 683.60 | 190.64 |

# Sales Targets Reports

## Description

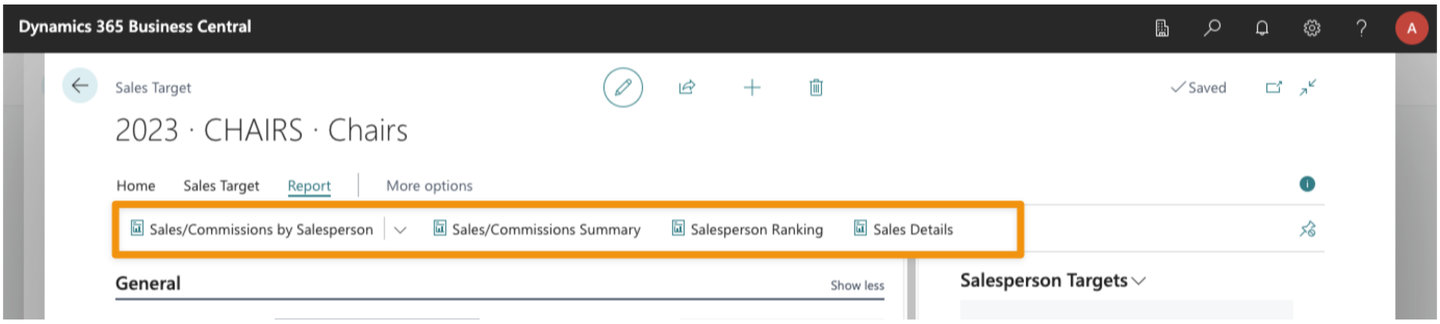
iDynamics Commission lets you configure sales targets for a specific period and generate commissions for each salesperson based on their achieved targets. These reports will let you check the achievement status of each target, as well as how sales for each target have evolved.

**NOTE**

Sales targets can be defined with no commissions. These reports can be used to track sales for a particular item/customer/salesperson combination, regardless of whether any commissions have been set for the target.

## Report Menu

All of the reports defined in this chapter can be found under the *Report* menu, in the action bar of a sales target, or under the *More Options > Reports* menu, of the same action bar.




## Data Updated At

When you run most of these reports, you will see a *Data Updated At* message, both in the request pages and in the generated reports. As aggregating all sales that have to be included in the target filters is a complex process, the sales stats for the target are not updated immediately when an invoice is posted, but periodically through a background task.

The date/time shown next to the *Data Updated At* label specifies that the report will include all sales posted until that specific moment. If needed, the stats can be updated manually by using the *Update Stats* action.

## Customizing Reports

All of the sales target reports, except the sales target history, have been designed in Word. This means that they can be easily customized (see the tutorial for salesperson commissions). You can customize the colors and logos, as well as add any of the additional values that are not shown by default.

## Sales/Commissions by Salesperson

This report has two different versions, depending on whether the sales target has milestones defined or not.

### Sales Target Without Milestones

This report shows a summary of the achieved sales/commissions by each salesperson, and how far away they are from achieving each of the defined targets.

Jim Olive - Tables

Period: January 1, 2022 - December 30, 2022

CRONUS USA, Inc.

December 30, 2022

| | Total Sales | Margin | Commission | Outstanding |
|---|---|---|---|---|
| Achieved | 56,696.40 | 21.99% | 2,834.82 | 2,834.82 |

| Min. Amount | Min. Margin | Commission % | Fixed Amount | Amount Status |
|---|---|---|---|---|
| 10,000 | 0% | 4% | 0 | Achieved |
| 40,000 | 0% | 5% | 0 | Achieved |
| 100,000 | 0% | 6% | 0 | -43,303.60 |

Customer filter: All Customers
Line filter: Item Group TABLES
Target amount: Sales Amount

% commission: Highest
Fixed commission: Highest
Commission base: Sales Amount

A cutoff date can be specified so that the report only takes into account sales up until the selected date.

### Sales Target With Milestones

In this case, instead of a cutoff date, a specific milestone can be selected. The report will only show sales and commissions up until the selected milestone, showing a detailed summary of how each salesperson has performed on each milestone.

Kate S. - Chairs

Period: January 1, 2022 - October 31, 2022

CRONUS USA, Inc.

December 30, 2022

| Achieved % | Min. Margin | Commission % | Fixed Amount |
|---|---|---|---|
| 60% | 0% | 1% | 0 |
| 100% | 0% | 3% | 0 |
| 110% | 0% | 4% | 500 |

Customer filter: All Customers
Line filter: Item Group CHAIRS
Target amount: Sales Amount

% commission: Highest
Fixed commission: Highest
Commission base: Sales Amount

| | Milestone | | | Cumulative | | |
|---|---|---|---|---|---|---|
| | Expected | Achieved | Commissions | Expected | Achieved | Commissions |
| JANUARY | 80,000.00 | (106.25%) 85,000.00 | (3%) 2,550.00 | 80,000.00 | (106.25%) 85,000.00 | (3%) 2,550.00 |
| FEBRUARY | 80,000.00 | (25.00%) 20,000.00 | (-7.5%) -1,500.00 | 160,000.00 | (65.63%) 105,000.00 | (1%) 1,050.00 |
| MARCH | 80,000.00 | (173.75%) 139,000.00 | (4.51%) 6,270.00 | 240,000.00 | (101.67%) 244,000.00 | (3%) 7,320.00 |
| APRIL | 80,000.00 | (102.50%) 82,000.00 | (3%) 2,460.00 | 320,000.00 | (101.88%) 326,000.00 | (3%) 9,780.00 |
| MAY | 80,000.00 | (117.50%) 94,000.00 | (3%) 2,820.00 | 400,000.00 | (105.00%) 420,000.00 | (3%) 12,600.00 |
| JUNE | 100,000.00 | (98.00%) 98,000.00 | (3%) 2,940.00 | 500,000.00 | (103.60%) 518,000.00 | (3%) 15,540.00 |
| JULY | 100,000.00 | (100.50%) 100,500.00 | (3%) 3,015.00 | 600,000.00 | (103.08%) 618,500.00 | (3%) 18,555.00 |
| AUGUST | 20,000.00 | (80.00%) 16,000.00 | (3%) 480.00 | 620,000.00 | (102.34%) 634,500.00 | (3%) 19,035.00 |
| SEPTEMBER | 80,000.00 | (117.50%) 94,000.00 | (3%) 2,820.00 | 700,000.00 | (104.07%) 728,500.00 | (3%) 21,855.00 |
| OCTOBER | 100,000.00 | (118.00%) 118,000.00 | (3%) 3,540.00 | 800,000.00 | (105.81%) 846,500.00 | (3%) 25,395.00 |
| NOVEMBER | 100,000.00 | - - | - - | 900,000.00 | - - | - - |
| DECEMBER | 100,000.00 | - - | - - | 1,000,000.00 | - - | - - |

| | Total Sales | Margin | Commission | Outstanding |
|---|---|---|---|---|
| Achieved | 846,500.00 | 99.79% | 25,395.00 | 25,395.00 |

# Sales/Commissions Summary

While the previous report printed one page for each salesperson, with detailed information about sales and commissions, this one gives you a summary of all salespeople, so that you can quickly check and compare how each one of them is performing.

## Chairs - Summary

Period: January 1, 2022 - November 30, 2022

CRONUS USA, Inc.

December 30, 2022

| Salesperson | Total Sales | Margin | Commission | Outstanding |
|---|---|---|---|---|
| Benjamin Chiu | 580,000.00 | 99.97% | (3.00%) 17,400.00 | 17,400.00 |
| Ester Henderson | 420,794.20 | 99.82% | (4.00%) 16,831.77 | 16,831.77 |
| Jim Olive | 130,784.90 | 72.6% | (4.38%) 5,731.40 | 5,731.40 |
| Kate S. | 846,500.00 | 99.79% | (1.00%) 8,465.00 | 8,465.00 |
| | 1,978,079.10 | 98.05% | 48,428.17 | 48,428.17 |

Customer filter: All Customers
Line filter: Item Group CHAIRS

Target amount: Sales Amount
Commission base: Sales Amount

# Salesperson Ranking

Similar to the sales/commissions summary, this report only includes sales, and lists salespeople in descending order, based on the total sales amount achieved by each one.

## CHAIRS - Sales ranking

Period: January 1, 2022 - November 30, 2022

CRONUS USA, Inc.

December 30, 2022

| Salesperson | Units (base) | Margin | Total Sales |
|---|---|---|---|
| Kate S. | 12 | 99.79% | 846,500.00 |
| Benjamin Chiu | 1 | 99.97% | 580,000.00 |
| Ester Henderson | 5 | 99.82% | 420,794.20 |
| Jim Olive | 240 | 72.6% | 130,784.90 |
| | | 98.05% | 1,978,079.10 |

Customer filter: All Customers
Line filter: Item Group CHAIRS

This report does not show the actual commissions, so it can be handed to the salespeople that take part in the target.

# Sales Details

This report shows a complete list of all sales lines, or sales invoices (you have two different reports to choose from) that have been taken into account to calculate the total sales amount achieved by each salesperson.

Jim Olive - CHAIRS sales details

Period: January 1, 2022 - November 30, 2022

CRONUS USA, Inc.

December 30, 2022

| Posting Date | Document No. | Customer No. | Description | Units (base) | Margin | Sales Amount |
|---|---|---|---|---|---|---|
| 03/20/22 | PS-INV103186 | 10000 | ROME Guest Chair, green | 5 | 22.04% | 964.00 |
| 03/21/22 | PS-INV103187 | 30000 | SEOUL Guest Chair, red | 2 | 22.04% | 385.60 |
| 03/22/22 | PS-INV103188 | 50000 | MEXICO Swivel Chair, black | 2 | 22.09% | 380.20 |
| 03/23/22 | PS-INV103189 | 40000 | ROME Guest Chair, green | 2 | 22.04% | 385.60 |
| 03/24/22 | PS-INV103190 | 20000 | PARIS Guest Chair, black | 5 | 22.04% | 964.00 |
| 03/24/22 | PS-INV103190 | 20000 | TOKYO Guest Chair, blue | 7 | 22.04% | 1,349.60 |
| 03/24/22 | PS-INV103190 | 20000 | MOSCOW Swivel Chair, red | 4 | 22.09% | 760.40 |
| 03/24/22 | PS-INV103191 | 10000 | MUNICH Swivel Chair, yellow | 3 | 22.09% | 570.30 |
| 03/27/22 | PS-INV103194 | 40000 | LONDON Swivel Chair, blue | 7 | 22.09% | 1,330.70 |
| 03/27/22 | PS-INV103194 | 40000 | MEXICO Swivel Chair, black | 6 | 22.09% | 1,140.60 |
| 03/27/22 | PS-INV103194 | 40000 | MOSCOW Swivel Chair, red | 1 | 22.09% | 190.10 |
| 03/29/22 | PS-INV103195 | 20000 | PARIS Guest Chair, black | 5 | 22.04% | 964.00 |
| 03/30/22 | PS-INV103196 | 30000 | BERLIN Guest Chair, yellow | 13 | 22.04% | 2,506.40 |
| 03/30/22 | PS-INV103196 | 30000 | MUNICH Swivel Chair, yellow | 6 | 22.09% | 1,140.60 |
| 03/31/22 | PS-INV103197 | 50000 | SEOUL Guest Chair, red | 5 | 22.04% | 964.00 |
| 04/01/22 | PS-INV103198 | 30000 | ROME Guest Chair, green | 2 | 22.04% | 385.60 |
| 04/01/22 | PS-INV103198 | 30000 | SYDNEY Swivel Chair, green | 8 | 22.09% | 1,520.80 |
| 04/04/22 | PS-INV103216 | 10000 | MEXICO Swivel Chair, black | 5 | 22.09% | 950.50 |
| 04/11/22 | PS-INV103215 | 50000 | Armless swivel chair, blue | 4 | 22.09% | 760.40 |
| 04/11/22 | PS-INV103217 | 10000 | PARIS Guest Chair, black | 6 | 22.04% | 1,156.80 |
| 04/11/22 | PS-INV103217 | 10000 | LONDON Swivel Chair, blue | 6 | 22.09% | 1,140.60 |
| | | | Totals: | 240 | 72.6% | 130,784.90 |

Customer filter: All Customers

Line filter: Item Group CHAIRS

**NOTE**

When emailing the sales/commissions by salesperson report, you can check an option to also attach these reports to the email sent to each salesperson.

## Sales Target History

Available in the sales target codes list, from a particular sales target within a period, and in the *Reports* > *Sales Targets* menu, within the action bar of both the *Salespeople/Purchasers* and *Commission Entries* lists, this report shows all sales and commissions generated for a particular sales target code, across different commission periods.

This report can be useful not just to see how commissions have been generated, but how sales have been performing for a particular item or item group.

Dynamics 365 Business Central Sandbox A

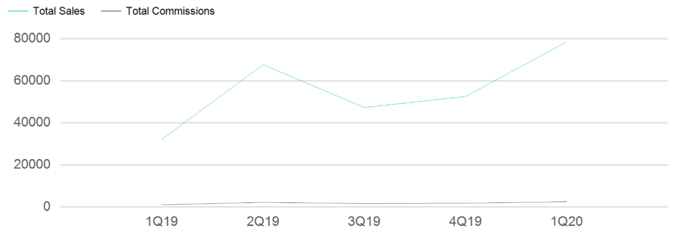
**MUEBLES History**

**1/1/2019 - 3/31/2020**

CRONUS ES

March 2, 2020

**Period Filter: *Q***




| | | | |
|---|---|---|---|
| Total Sales: | 278,368.30 | Total Qty. Base: | 347.00 |
| Total Commissions: | 9,231.26 | | |

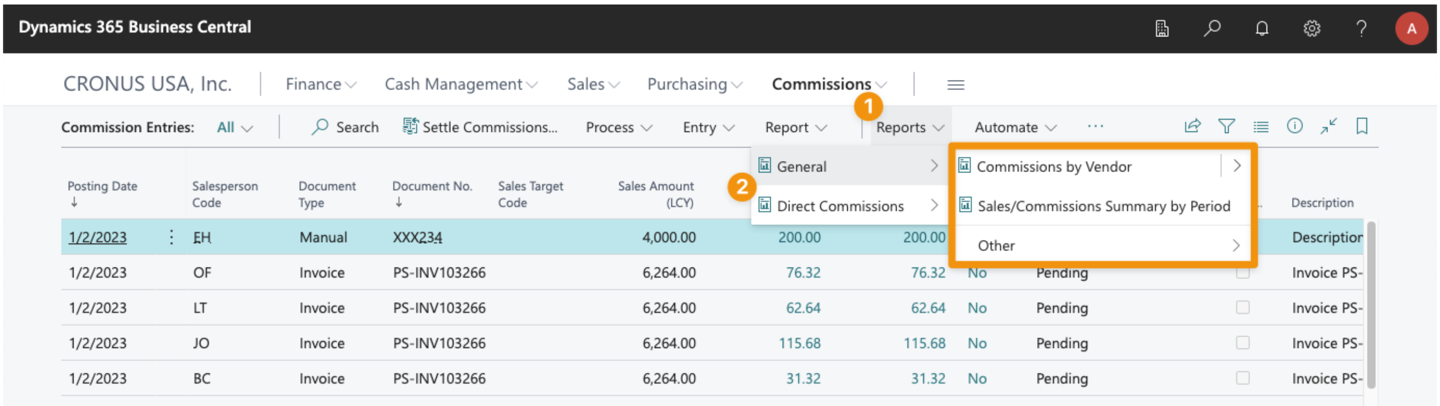
| | Period | | Sales | | Commissions |
|---|---|---|---|---|---|
| | **Start Date** | **End Date** | **Amount** | **Quantity Base** | **Total** |
| **1Q19** | 01/01/2019 | 31/03/2019 | 32,185.60 | 32.00 | 1,043.71 |
| **2Q19** | 01/04/2019 | 30/06/2019 | 67,708.40 | 85.00 | 2,231.25 |
| **3Q19** | 01/07/2019 | 30/09/2019 | 47,349.10 | 62.00 | 1,620.47 |
| **4Q19** | 01/10/2019 | 31/12/2019 | 52,575.80 | 66.00 | 1,801.84 |
| **1Q20** | 01/01/2020 | 31/03/2020 | 78,549.40 | 102.00 | 2,533.99 |

# Commission and Sales Reports

## Description

iDynamics Commissions includes several reports that show you commissions and sales generated over time, as well as settlements paid to salespeople.

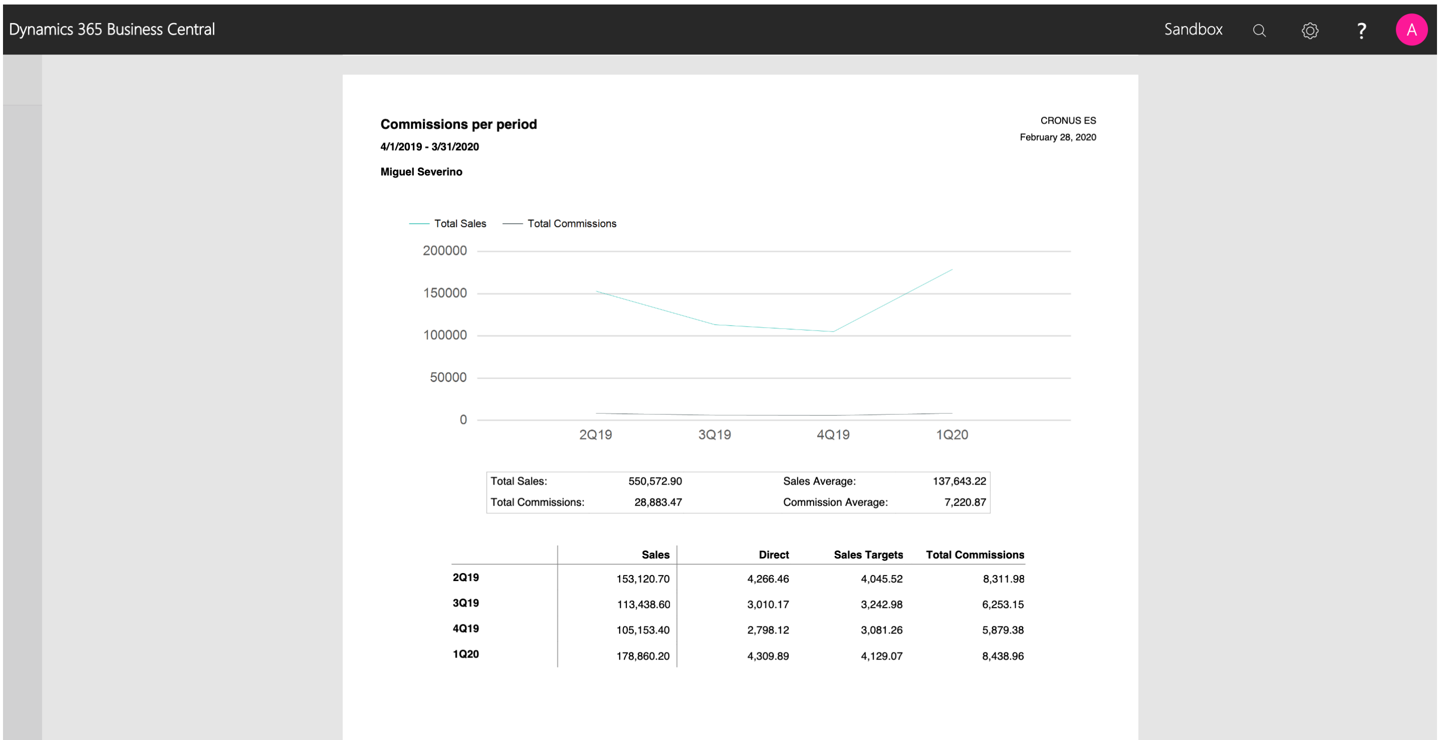
The reports detailed here can be found in the *Report* or *Reports > General* menu, in the action bar of both the *Salespeople/Purchasers* and *Commission Entries* lists, inside *More actions*...




## Commissions per period

This report shows sales and commissions generated, for each salesperson, over different commission periods.

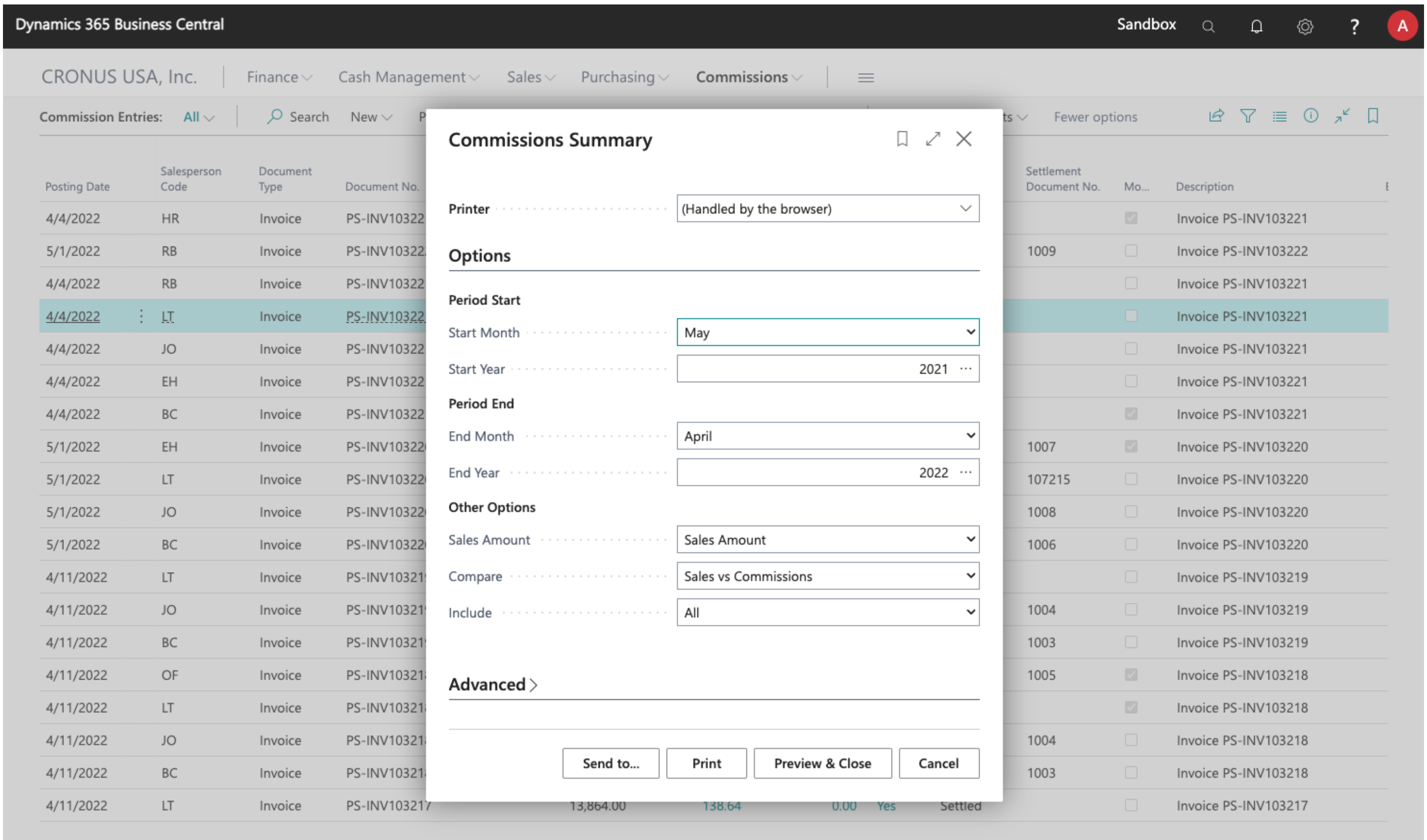
Even if no sales targets have been set up, you can create commission periods and run the report to see direct commissions grouped by different periods (e.g. biweekly, quarterly, yearly, etc.).




> **NOTE**
>
> For a commission period to be included in the report, both its start and end dates must have been specified, its start date must be on or after the start of the start period, and its end date on or before the end date of the end period.

# Commissions Summary

This report shows the monthly amounts for all salespeople in the selected filter range.

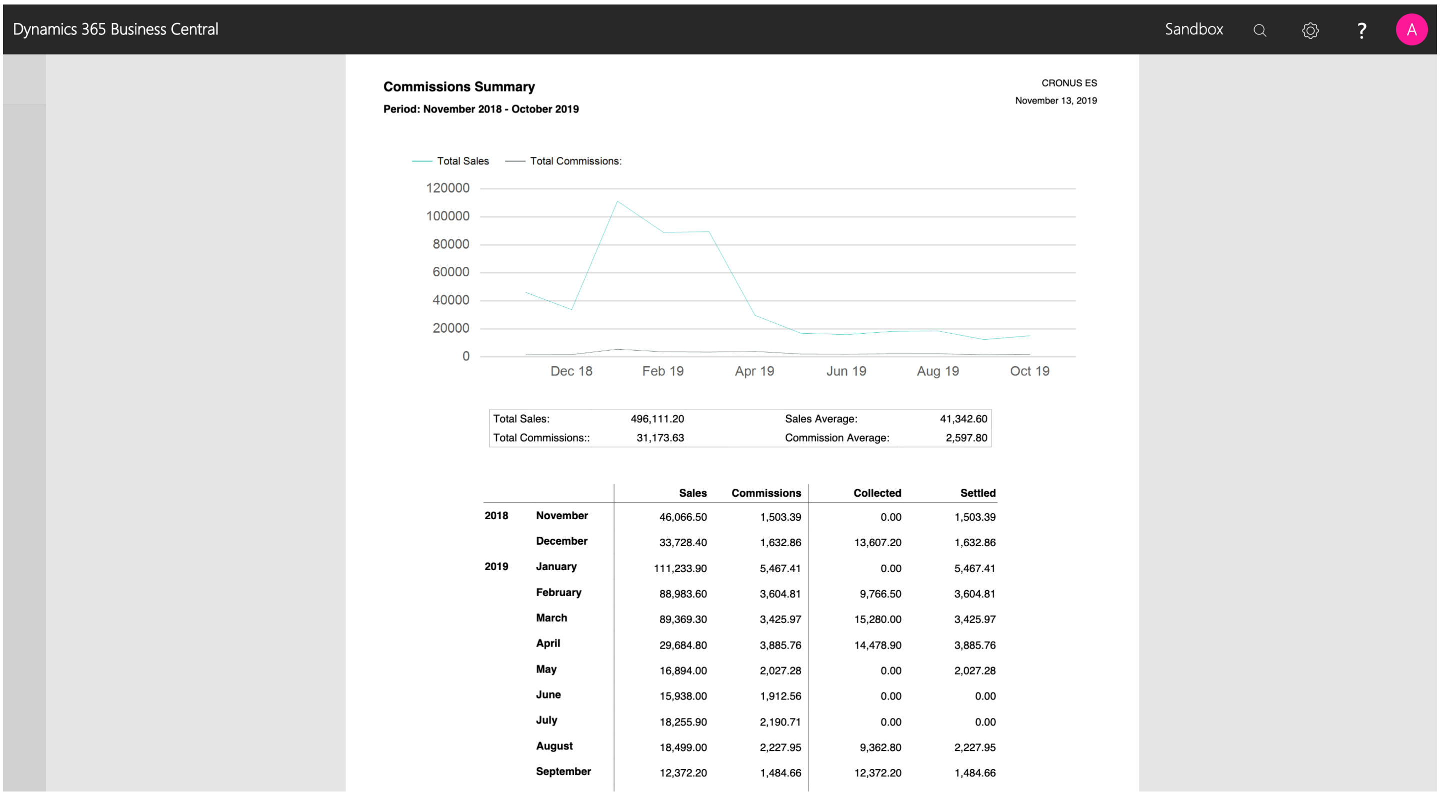


> **NOTE**
>
> When you define sales target commissions, these will be added to the month in which they were posted.

Just like the direct commissions per salesperson report, this report lets you compare sales with both commissions and settlements, but for all salespeople, including all commission types. You can also specify whether you want to compare the total sales amount, or just the total profit margin achieved.

### Sales and Commissions

This option shows all sales and commissions generated each month, also detailing how much has been collected from customers and how much has been paid to salespeople.




**Commissions Summary**
**Period: November 2018 - October 2019**

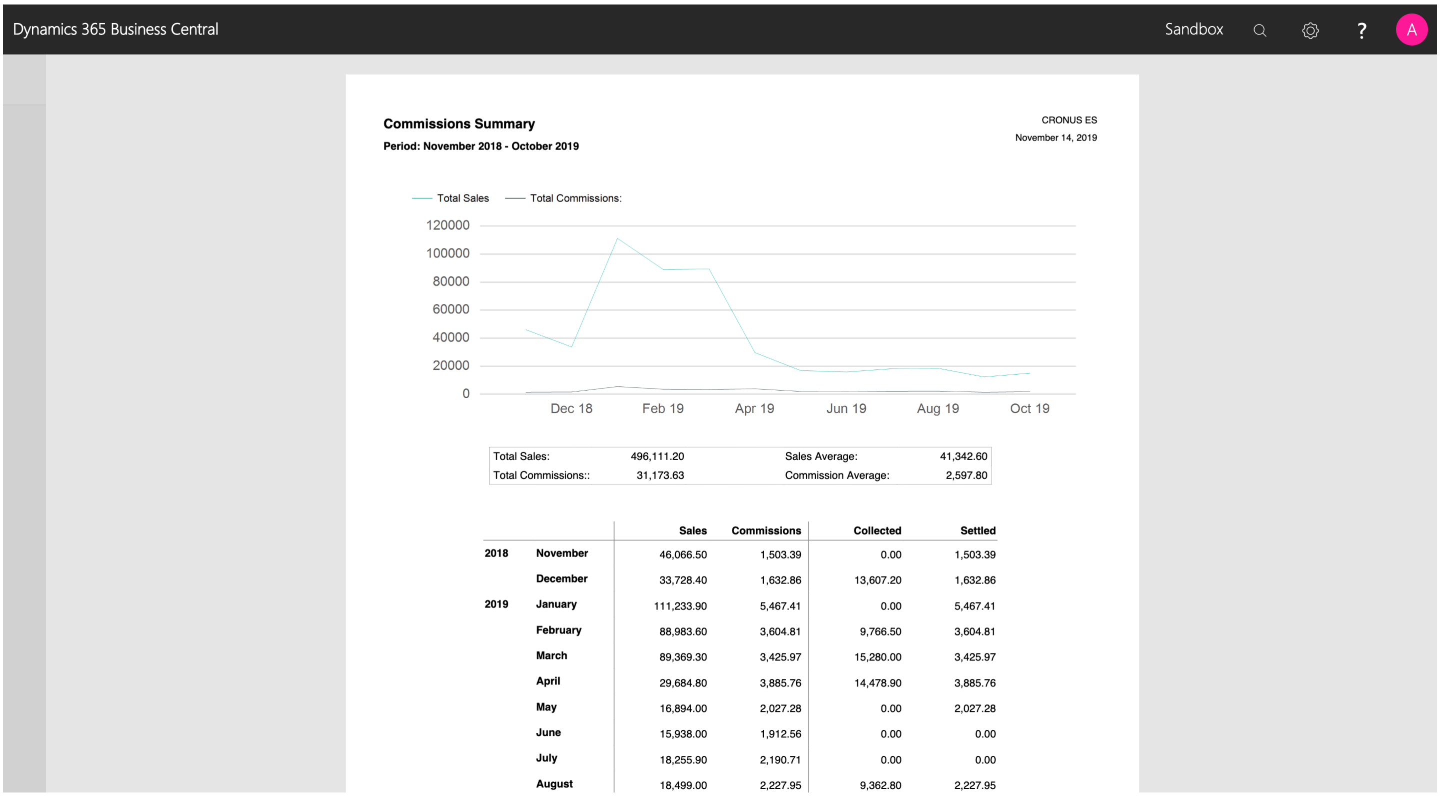
CRONUS ES
November 13, 2019

| | | | |
|---|---|---|---|
| Total Sales: | 496,111.20 | Sales Average: | 41,342.60 |
| Total Commissions:: | 31,173.63 | Commission Average: | 2,597.80 |

| | | Sales | Commissions | Collected | Settled |
|---|---|---|---|---|---|
| 2018 | November | 46,066.50 | 1,503.39 | 0.00 | 1,503.39 |
| | December | 33,728.40 | 1,632.86 | 13,607.20 | 1,632.86 |
| 2019 | January | 111,233.90 | 5,467.41 | 0.00 | 5,467.41 |
| | February | 88,983.60 | 3,604.81 | 9,766.50 | 3,604.81 |
| | March | 89,369.30 | 3,425.97 | 15,280.00 | 3,425.97 |
| | April | 29,684.80 | 3,885.76 | 14,478.90 | 3,885.76 |
| | May | 16,894.00 | 2,027.28 | 0.00 | 2,027.28 |
| | June | 15,938.00 | 1,912.56 | 0.00 | 0.00 |
| | July | 18,255.90 | 2,190.71 | 0.00 | 0.00 |
| | August | 18,499.00 | 2,227.95 | 9,362.80 | 2,227.95 |
| | September | 12,372.20 | 1,484.66 | 12,372.20 | 1,484.66 |

## Sales and Settlements

This option will show the same details as *Sales vs Commissions*, but the chart included in the document will compare how much has been sold with how much has been paid to salespeople, and collected from customers, each month.




**Commissions Summary**
**Period: November 2018 - October 2019**

CRONUS ES
November 14, 2019

| | | | |
|---|---|---|---|
| Total Sales: | 496,111.20 | Sales Average: | 41,342.60 |
| Total Commissions:: | 31,173.63 | Commission Average: | 2,597.80 |

| | | Sales | Commissions | Collected | Settled |
|---|---|---|---|---|---|
| 2018 | November | 46,066.50 | 1,503.39 | 0.00 | 1,503.39 |
| | December | 33,728.40 | 1,632.86 | 13,607.20 | 1,632.86 |
| 2019 | January | 111,233.90 | 5,467.41 | 0.00 | 5,467.41 |
| | February | 88,983.60 | 3,604.81 | 9,766.50 | 3,604.81 |
| | March | 89,369.30 | 3,425.97 | 15,280.00 | 3,425.97 |
| | April | 29,684.80 | 3,885.76 | 14,478.90 | 3,885.76 |
| | May | 16,894.00 | 2,027.28 | 0.00 | 2,027.28 |
| | June | 15,938.00 | 1,912.56 | 0.00 | 0.00 |
| | July | 18,255.90 | 2,190.71 | 0.00 | 0.00 |
| | August | 18,499.00 | 2,227.95 | 9,362.80 | 2,227.95 |

# Send Reports by Email

## Description

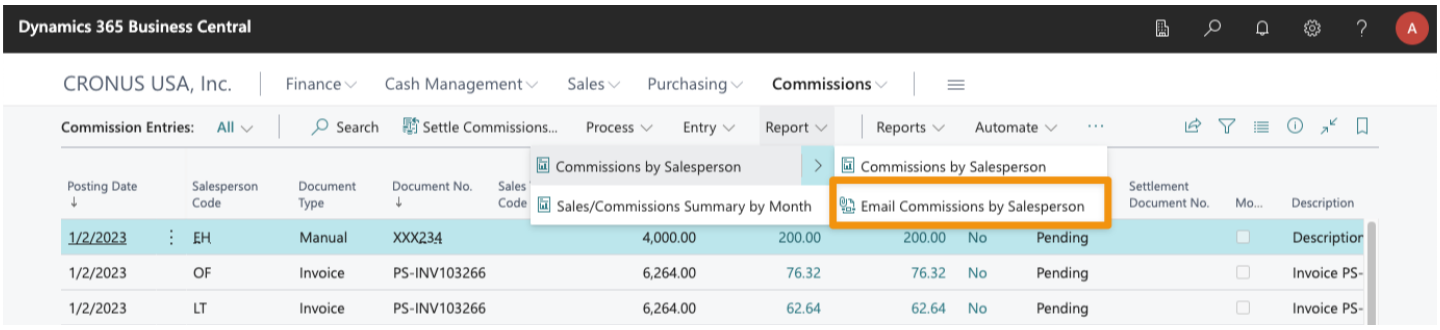
iDynamics Commissions includes the option to automatically send individual reports to each salesperson. This will let you provide information about the status of sales and commissions for salespeople that might not have access to Business Central or particular reports. **All reports sent by email will be for the individual salesperson**, not including information about sales or commissions for other salespeople.

Emails will be sent using the email configuration defined in Business Central, and the app lets you specify the subject for the emails, the body message that will be included with the report as a PDF, and add one or more people in CC so that they receive a copy of each email sent.

> **NOTE**
>
> iDynamics Commissions lets you specify a *Email Scenario* to it, so that commission reports are sent with a specific email account.

## Commissions

You will always find the *Email* action, for each report that supports it, on the dropdown available next to the report name.




All these reports support being automatically emailed to salespeople:

- Salesperson Commissions
- Vendor Commissions
- Sales/Commissions by Salesperson (Sales Targets)
- Direct Commissions Forecast
- Direct Commissions per Salesperson

Sending these reports by email will let you inform each salesperson of how their commissions/sales are currently going, as well as which commissions were obtained at a particular point in time.

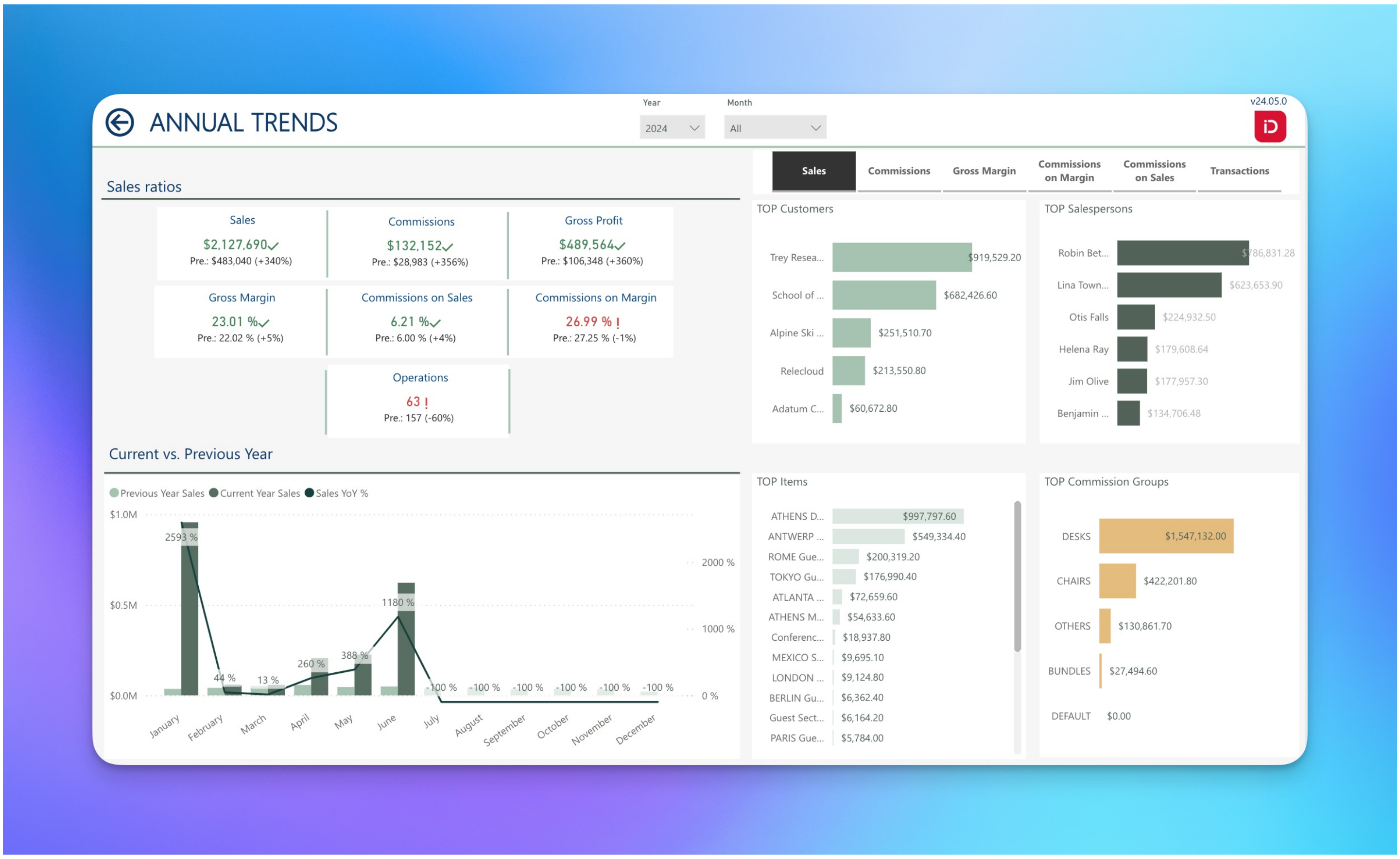
## Settlements

From the *Print & Send...* action menu of the settlement list, we can send each settlement document by email to its assigned salesperson.

This action is available both for open and posted settlement documents.

# iDynamics Commissions Analytics

*iDynamics Commissions Analytics* offers a a Power BI dashboard designed to provide insights not only into your company's commission structure, but also into overall sales performance.




## First Steps

Starting with our PowerBI is a simple three-part process: you install the app in Business Central, then you install the Power BI panel, and then you point the Power BI panel to your BC environment.

[Learn how to install the PowerBI app]

## Available Panels

Our dashboard includes lots of different panels to give you insights into your sales and commissions.

[Learn about the available panels]

# PowerBI - First Steps Guide

## 1. Install the Business Central app

Even if you already have installed iDynamics Commissions, you will need to install an extra extension that unlocks access to the PowerBI features. You can install the Business Central app from the AppSource

There is nothing to configure here but, just as with the iDynamics Commissions app, once you install the app you will see a notification letting you know that you can start a 15-day trial of iDynamics Commissions Analytics. Just click on that notification to enable the trial, and you are ready to go.

**NOTE**

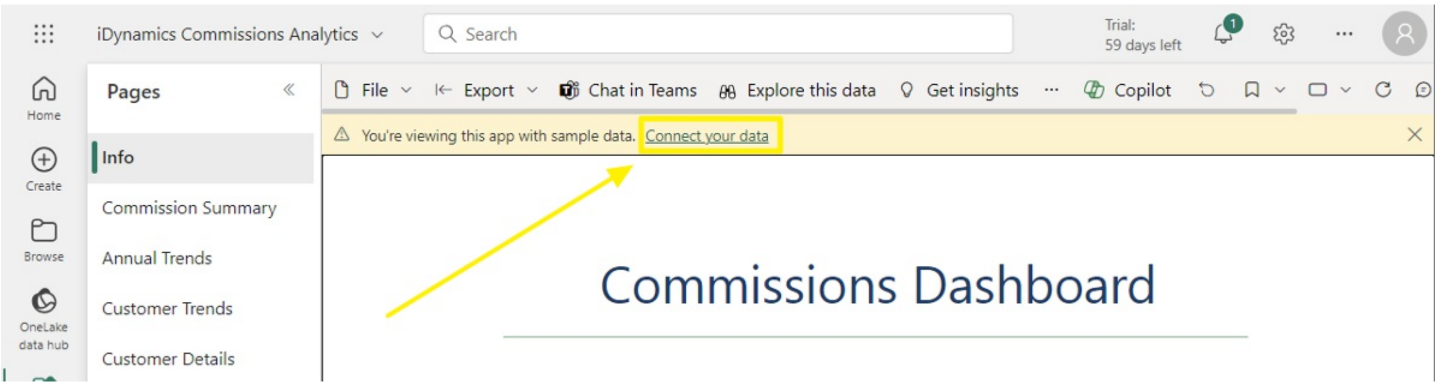
The notification that lets you start the trial will be shown once you install the app, and will also be shown every time you enter BC, or navigate to the home page of Business Central.

## 2. Install the PowerBI app

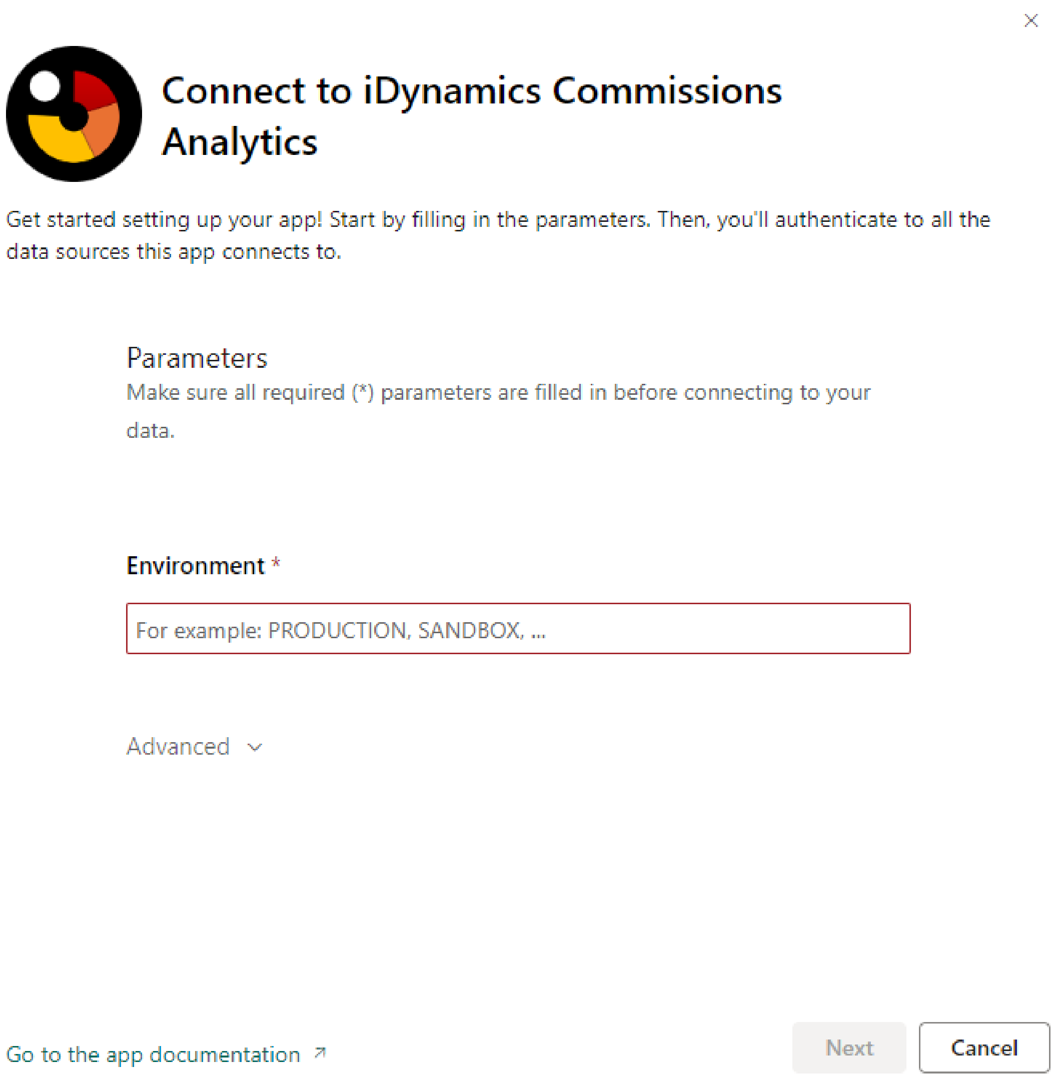
The next step is to install the PowerBI app as such. You can install the PowerBI app from the AppSource.

## 3. Connect the PowerBI app to Business Central

When you open the PowerBI app for the first time, you will see a notification with the message *You are viewing the app with sample data. Connect your data*.

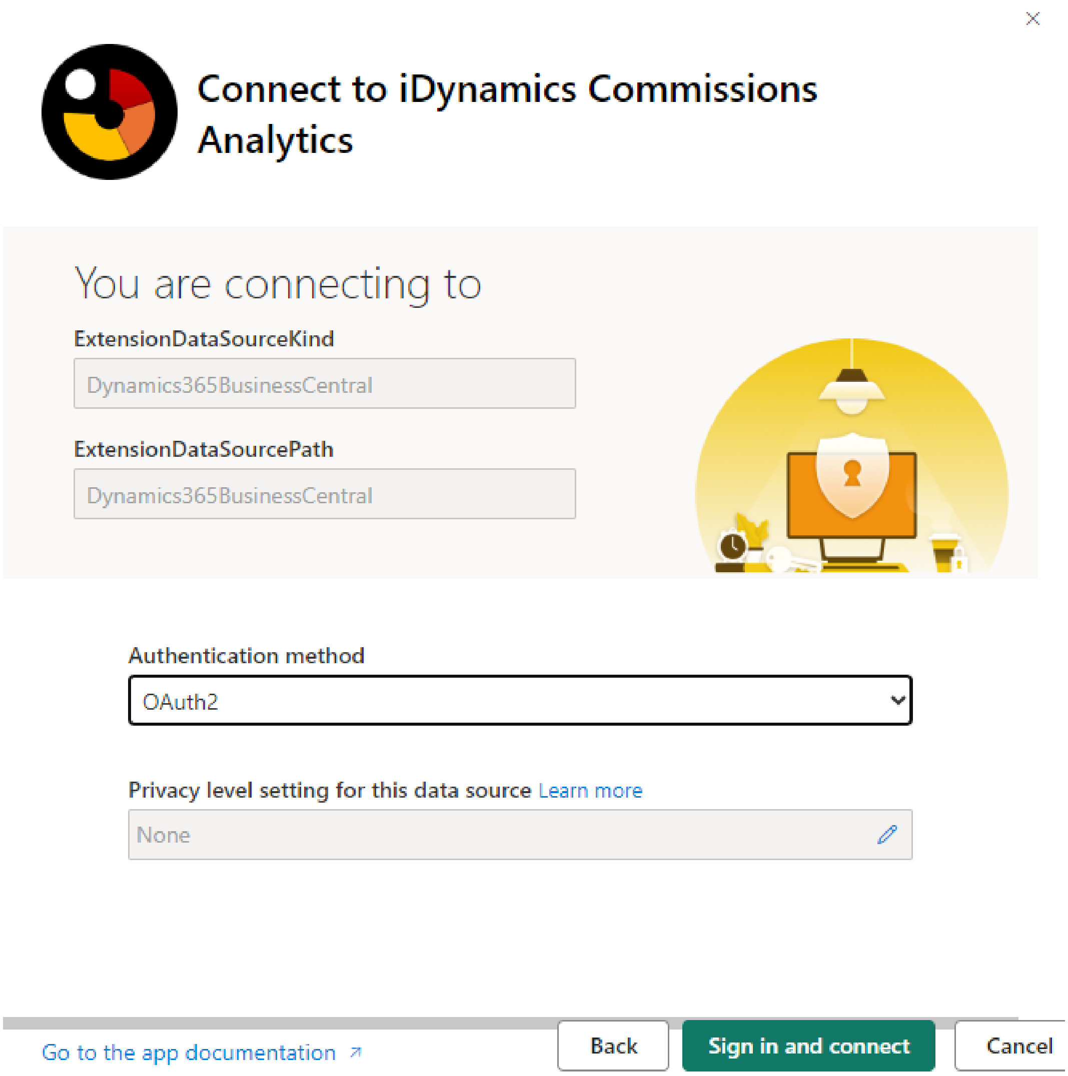



Once you click on it, a new window will open, letting you configure the connection to your Business Central environment. The most important step is the one shown below, where you have to specify the name of the environment you want to connect to.




The environment will be *PRODUCTION* for your production environment or the name of the sandbox to which you want to connect.

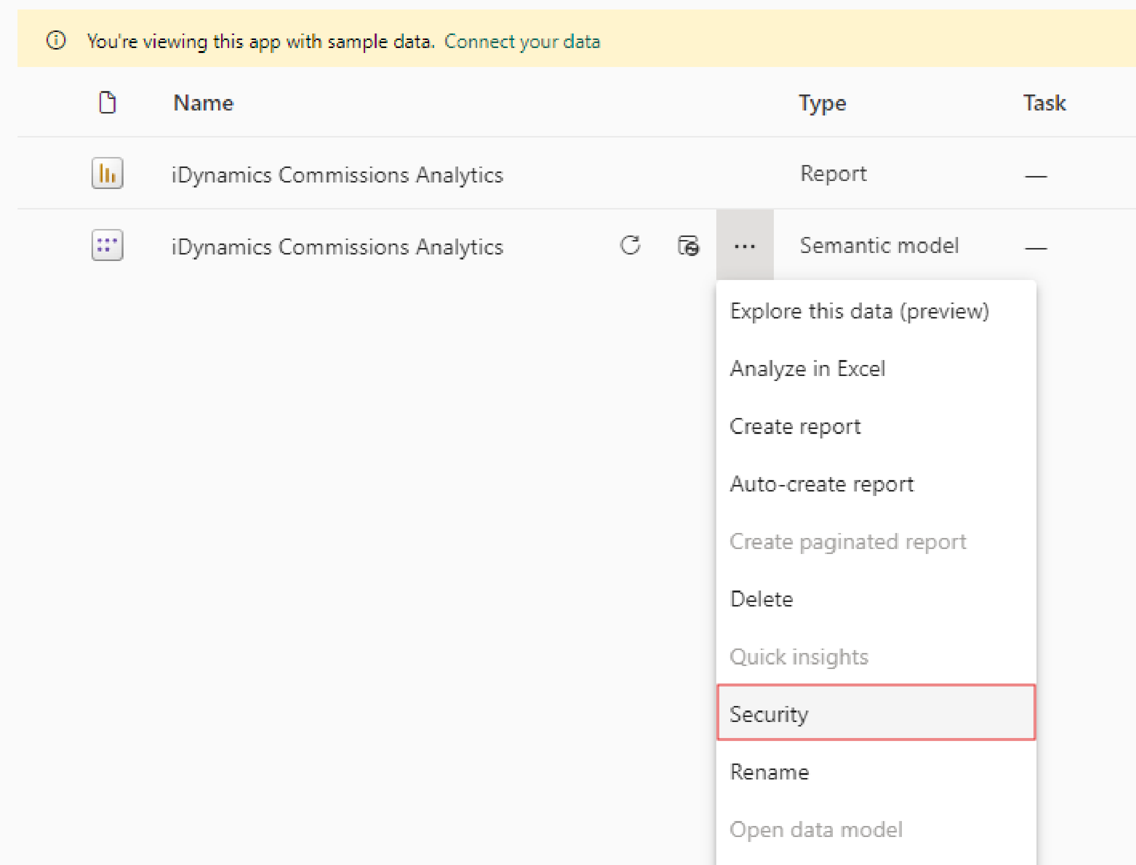
After you have completed the environment a new window will appear. Select OAuth2 in the Authentication method, then you must log in to your Business Central account.



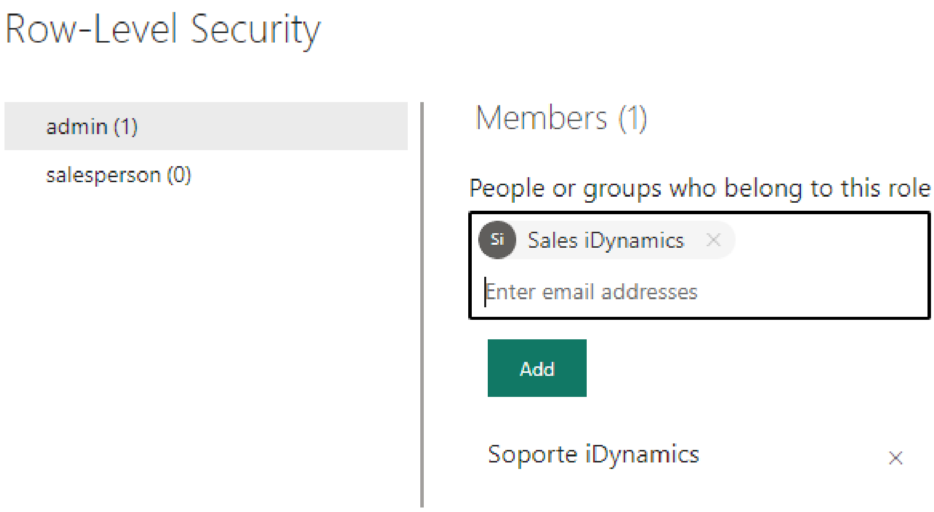

## 4. Permission Settings

In our PowerBI app, we have implemented Row-Level Security (RLS) to ensure data is accessed appropriately based on user roles. We have defined two distinct roles: **Admin** and **Salesperson**. The **Admin** role has comprehensive access to all data and reports within the application, allowing for full oversight and management capabilities. In contrast, the **Salesperson** role is restricted to viewing only the data pertinent to their specific sales and performance metrics. This segregation of data access helps maintain data confidentiality and integrity, ensuring that sensitive information is only accessible to authorized personnel.

In order to set up the roles, go to the Workspace that was created when you installed the PowerBI app. Then, just go to Semantic model "more options" and Security.



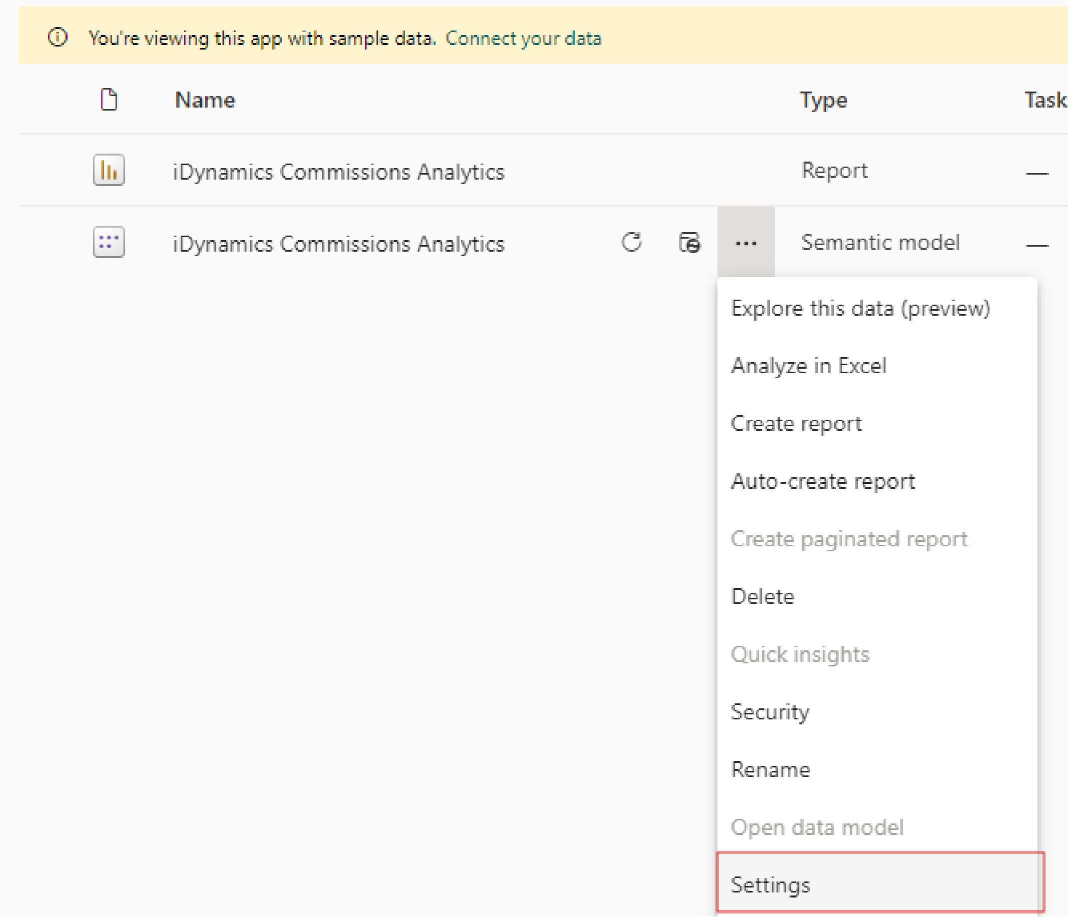

Once you are in, add the email of the users to the desired roles an then save.



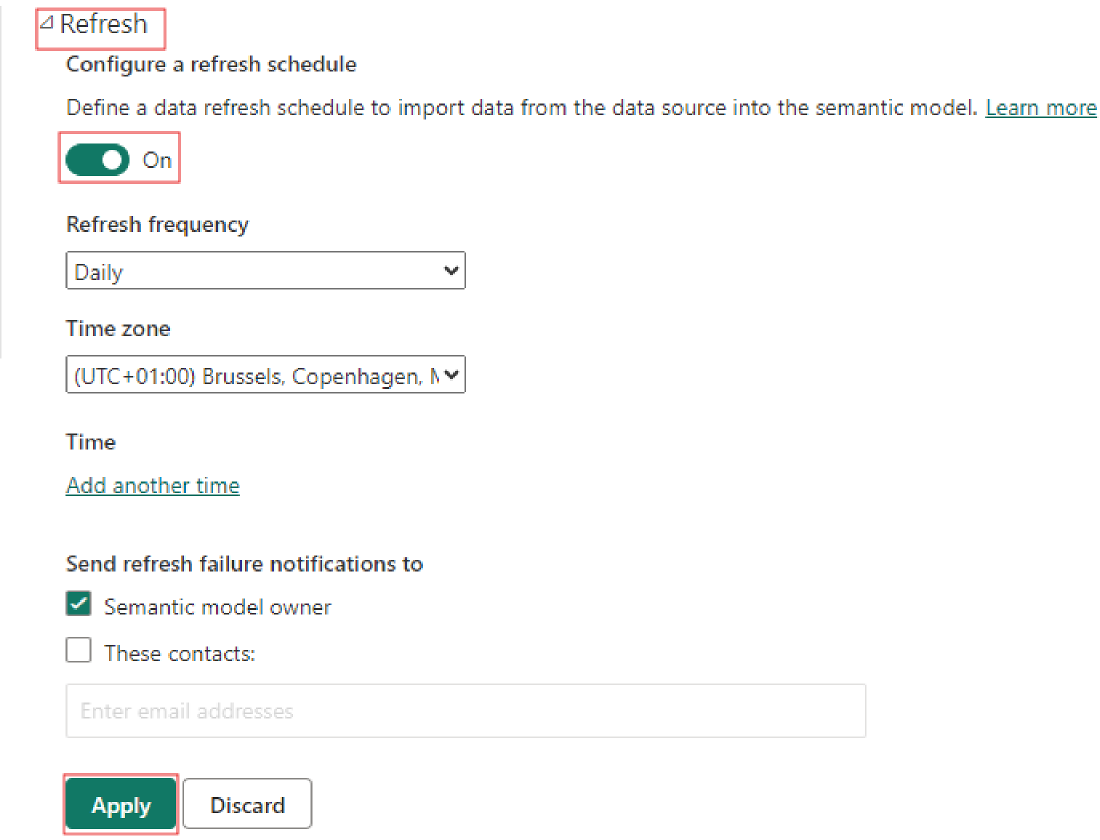

# 5. Data Refresh Schedule

To set up a data update schedule, follow the steps below:

In the Workspace, select "Semantic Model" - "Settings"

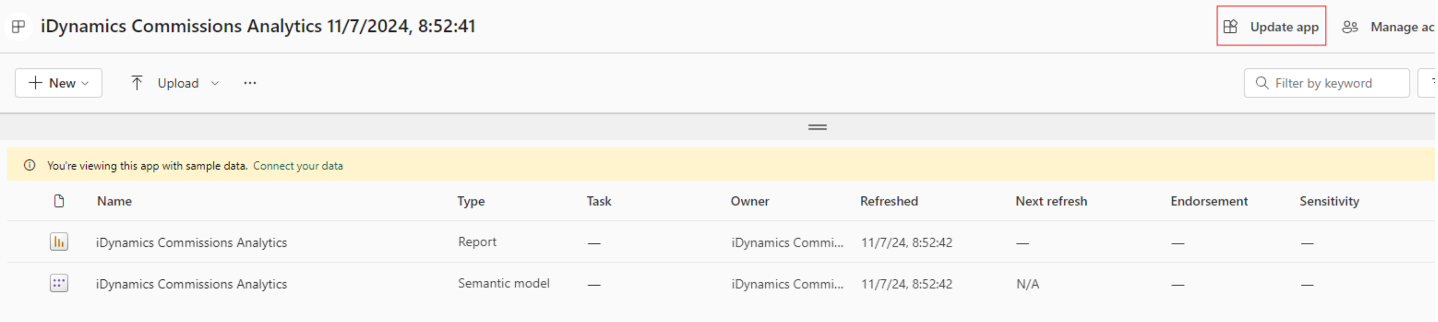



Then, select "Refresh" and choose the frequency you want.

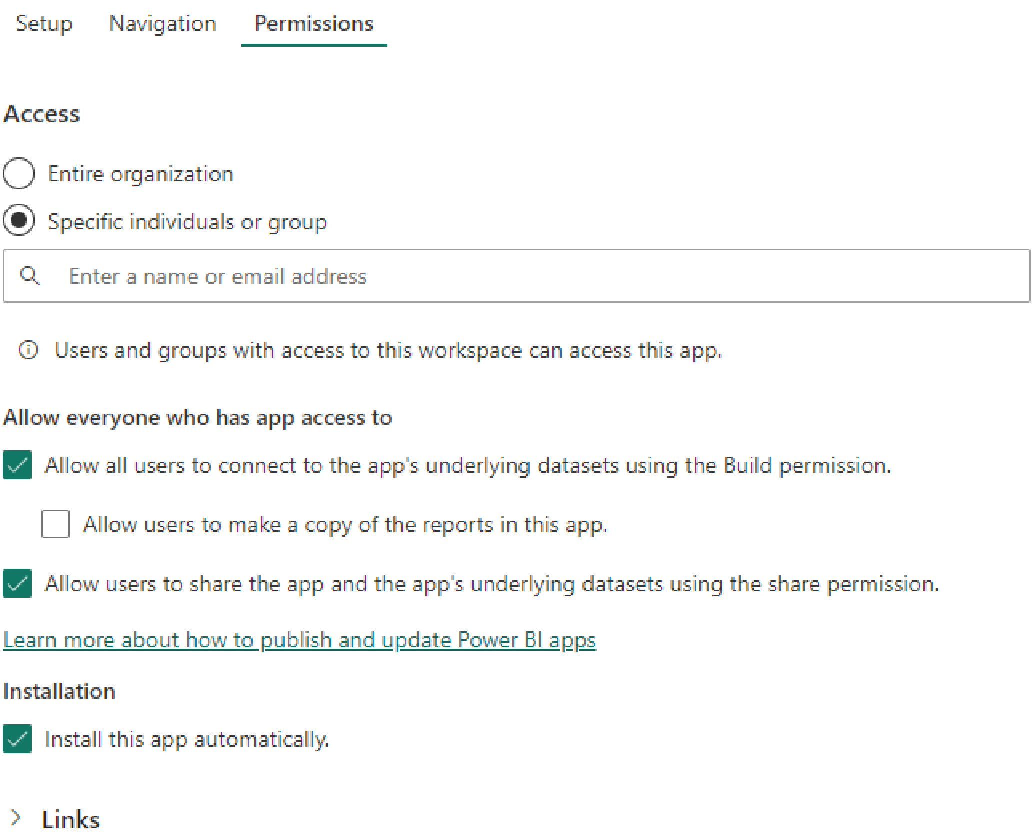



# 6. Share the App

First, go to the workspace that was created when the app was installed and select the option "Update app".




Then go to "Permissions" tab. Add the desired users and check the option "Install this app automatically". If this option is not enabled, you will need to enable it in PowerBI's Admin Portal.




Finally, update the app and the end users will be able to enjoy the app.

⚠ **WARNING**

Note that the users must be in one of the roles described in section 4 in order to be able to view the data.

# 7. Enjoy

The amount of data that you get will depend on how long you have been using Business Central and iDynamics Commissions (the PowerBI app uses the sales stats generated by our app). If you have just installed iDynamics Commissions, but **want to see data for previous months**, you can use the update commissions/stats action, updating only sales stats if you don't want to generate commissions.

# PowerBI - Available Panels

## Description

*iDynamics Commissions Analytics* offers a variety of pages that deliver valuable insights into both sales and the commissions they generate.

Users can break down and analyze commissions and sales data in detail, while also maintaining a high-level view through key performance indicators (KPIs) included in the dashboard. Among other things, the platform enables analysis of:

- Overall commission performance
- Year-over-year KPI trends with analytical breakdowns
- Customer, product, and salesperson trends over time
- Detailed insights into customers, products, and sales staff
- Sales and commission structures, with filtering by dimensions

In addition, *iDynamics Commissions Analytics* includes two key advanced features: **multi-currency analysis** and **multi-company analysis**.

### Multi-Currency Analysis

The dashboard is fully equipped to support scenarios where a company operates in multiple currencies. For instance, if commission payments to a salesperson are made in a currency different from the company's local currency, the dashboard will detect and appropriately convert these values to the local currency.

This also applies to customers who transact in a currency different from the company's base currency. For example, if the company operates in euros (€) but serves a customer invoicing in US dollars ($), the dashboard will calculate and display all relevant sales and commission metrics in the company's **local currency**.

In this case, *iDynamics Commissions Analytics* includes a currency selector on the main page. Based on the selected currency, only companies whose local currency matches the selected one will be available for analysis. Regardless of transaction currency, all results are converted and presented in the company's local currency for consistency.

> **IMPORTANT**
>
> The local currency for each company can be found in the **General Ledger Setup** section within Business Central.

### Multi-Company Analysis

*iDynamics Commissions Analytics* supports consolidated analysis across all companies within your Business Central environment —provided that **their local currency matches the currency selected in the dashboard filter**.

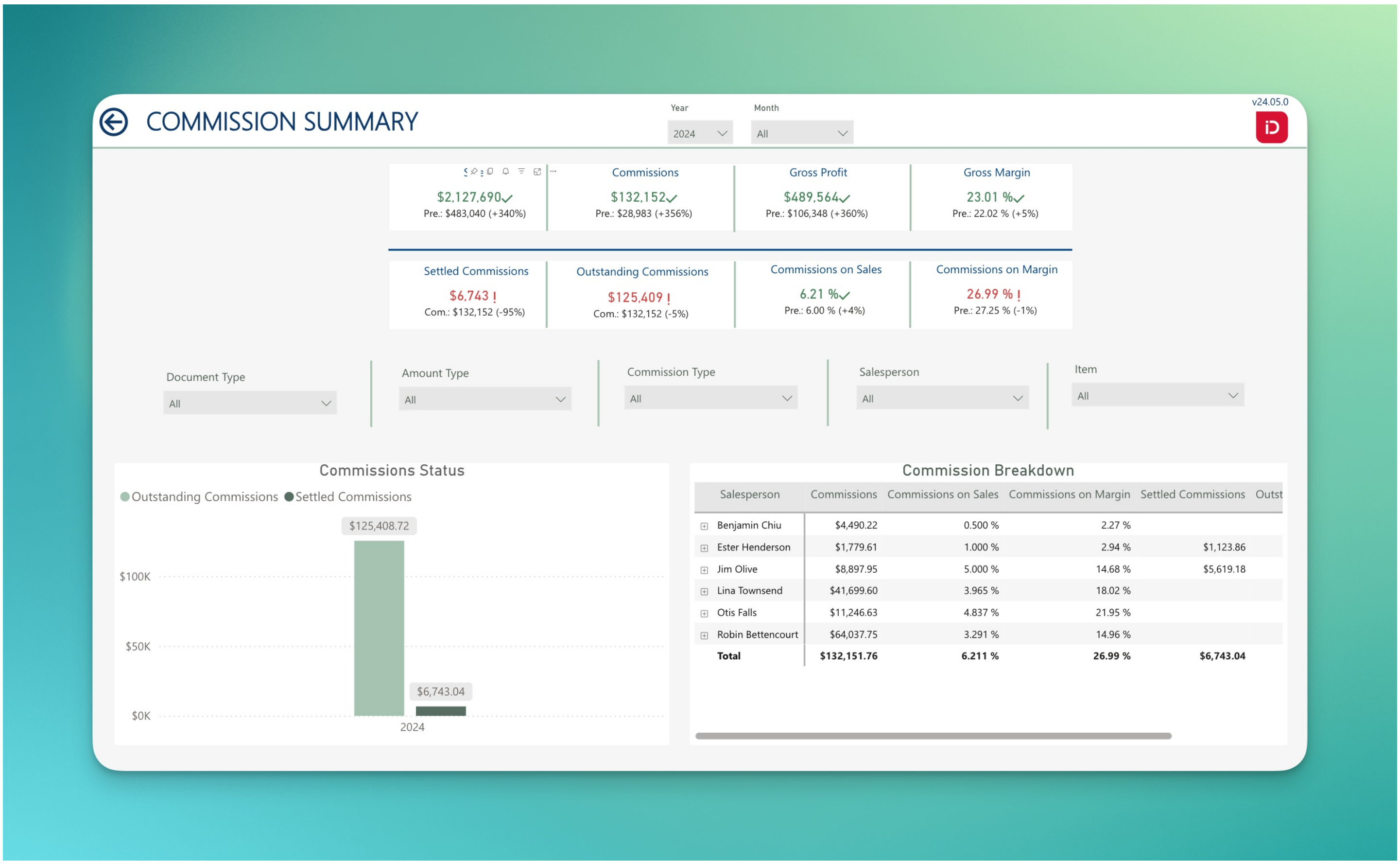
After selecting a currency, users will be able to view and compare sales and commissions across all companies with that currency, either collectively or individually. It's important to note that cross-company analysis is only possible when all selected companies share the same local currency. If multiple companies operate in one currency and another uses a different one, that third company must be analyzed separately by selecting its currency in the filter.

## Commissions Analytics Dashboard

### Commissions Summary

This panel provides users with a clear snapshot of commission activity, displaying eight key KPIs along with a comparison to the same period in the previous year.

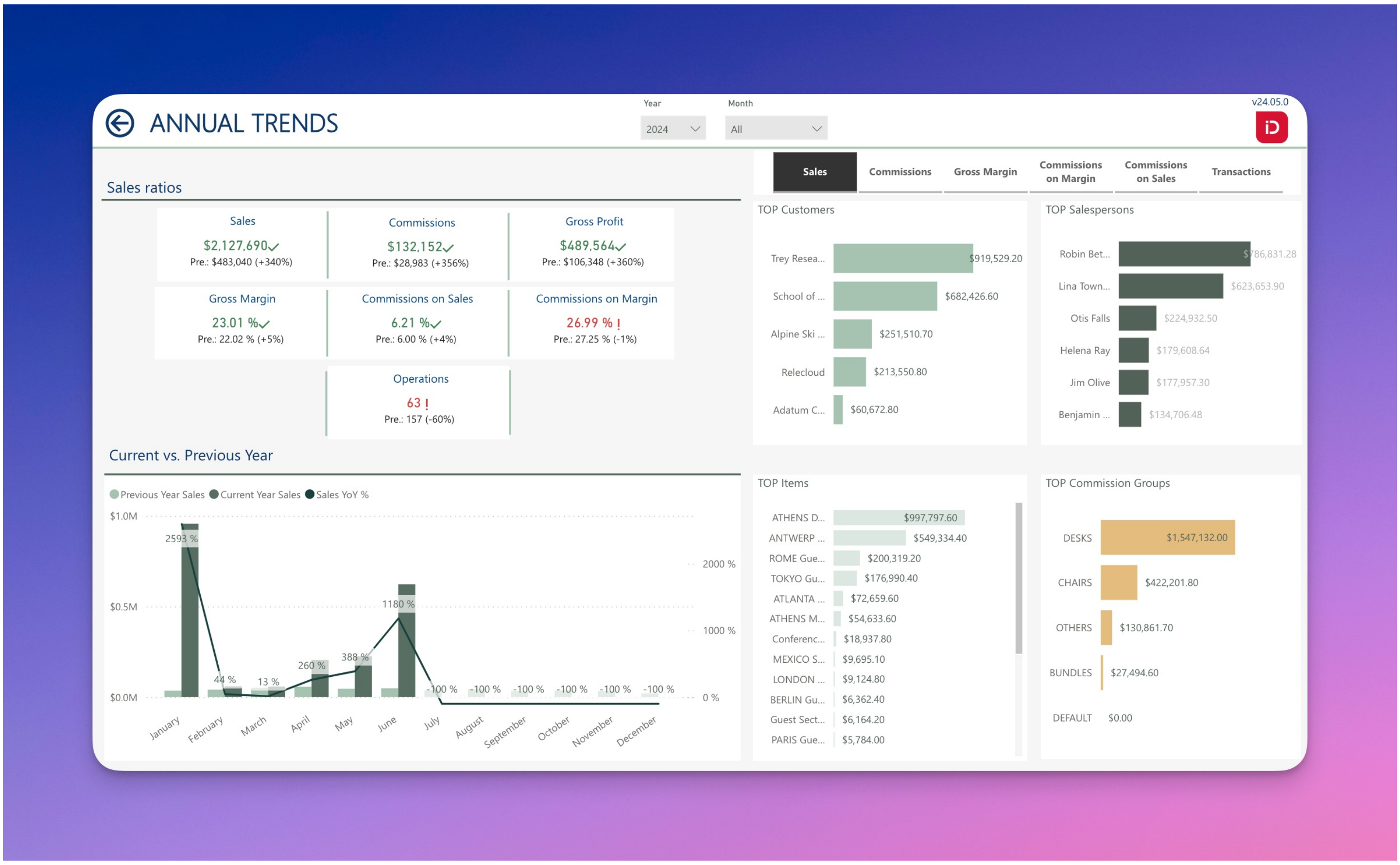
In addition to KPIs, the panel includes details on settled and pending commissions, as well as breakdowns by salesperson, month, document number, and invoice.




## Annual Trends

The Annual Trends panel presents a global overview of performance across the year. Tabs in the top-right corner allow users to toggle between views for sales, commissions, and margins.

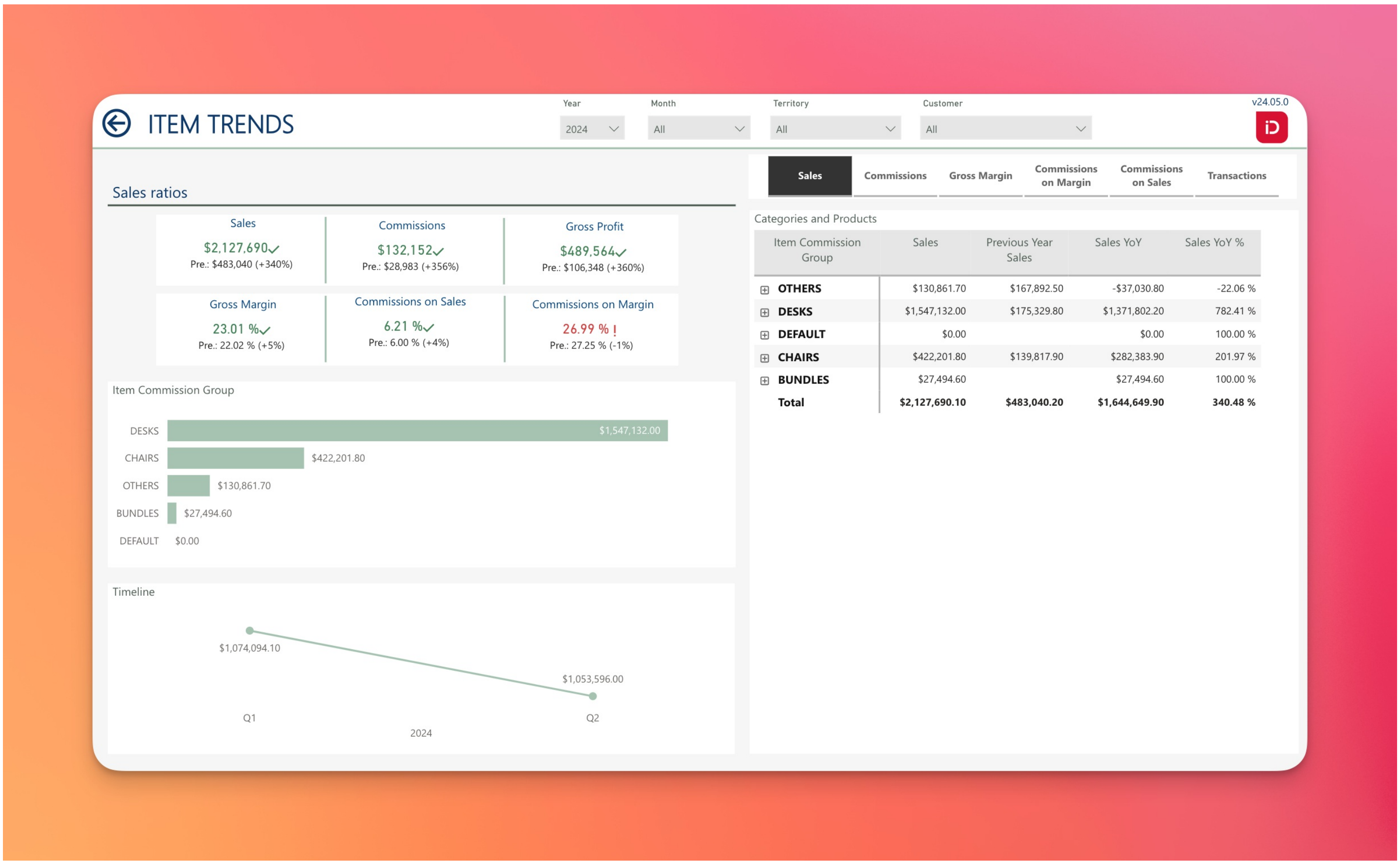
On the right-hand side, graphical breakdowns provide detailed insights into the selected KPI by customer, salesperson, product, and commission group. Each visualization includes **tooltips** that offer further detail—hovering over a chart will display the associated information.




## Customer, Item and Salesperson Trends

These panels—along with their corresponding detail views—offer a more targeted analysis of these three Business Central entities.

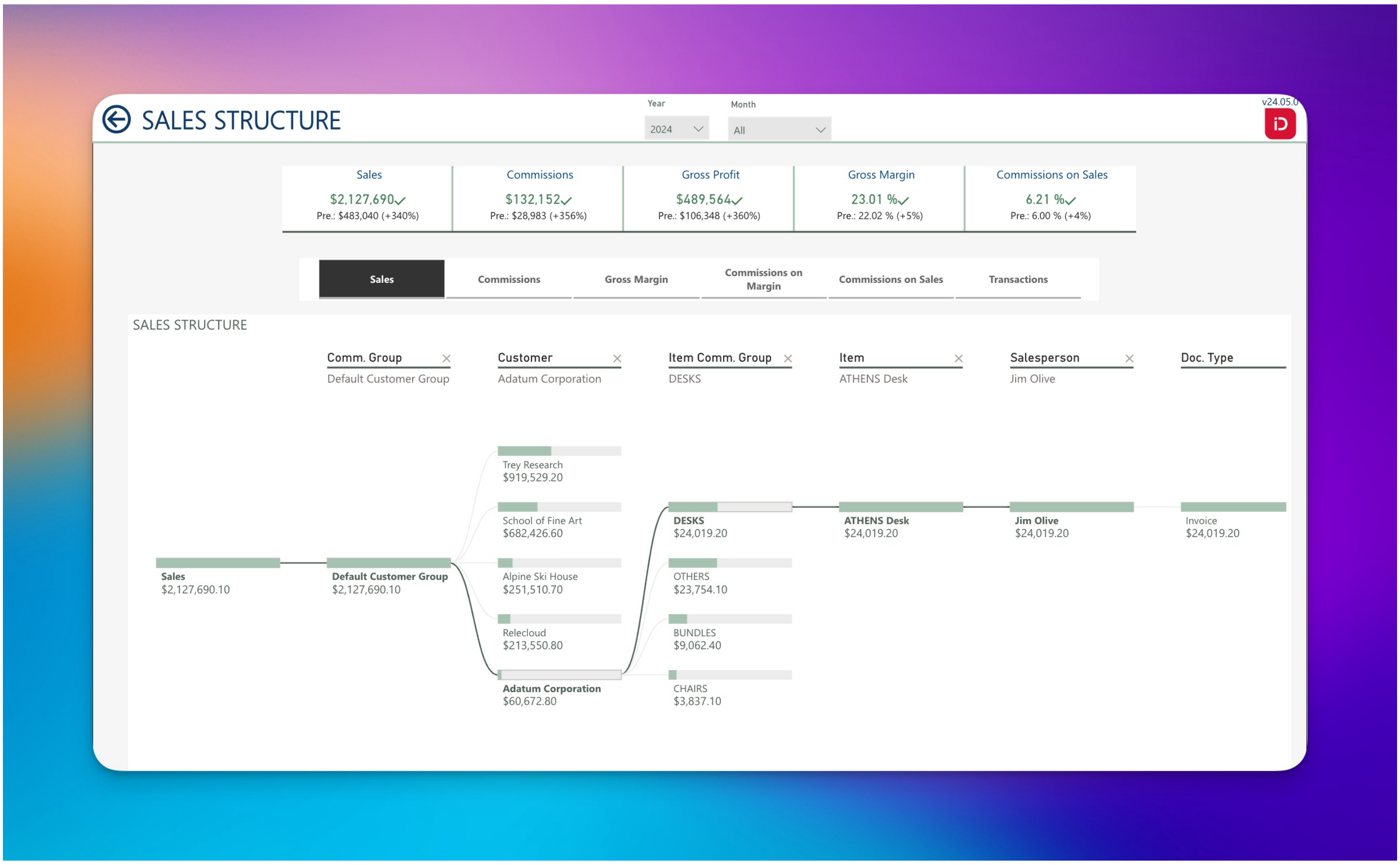
Users can explore trends in sales, commissions, transactions, and margins, filtered by customer, product type, or salesperson. This supports deeper insight and time-based analysis within each of these dimensions.



## Sales Structure

This page provides an at-a-glance overview of top-performing customers, products, and product groups, forming the core of the company's sales structure.

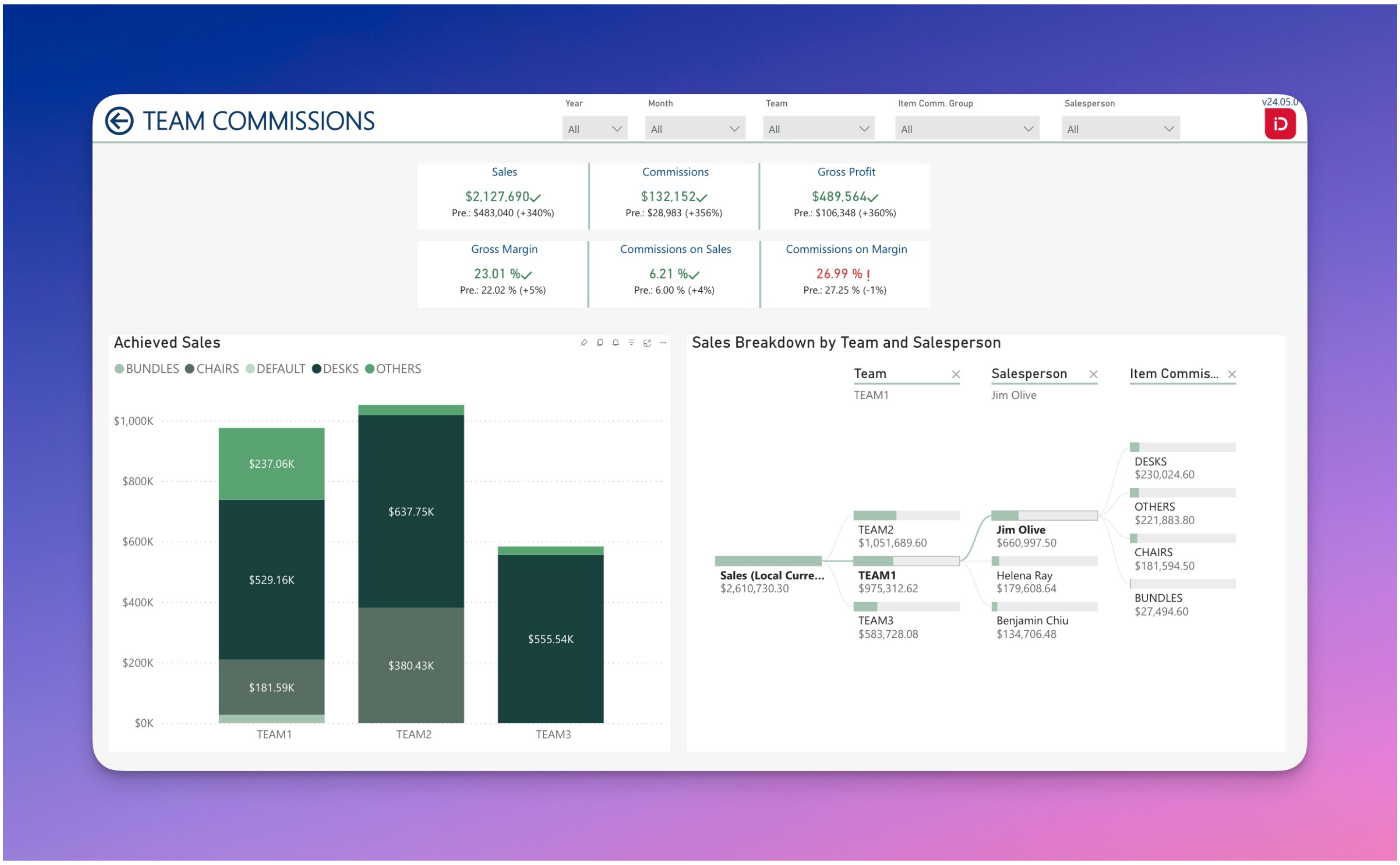
Beyond sales data, the dashboard includes breakdowns of commissions, transactions, and margins by dimensions such as salesperson, commission group, product, or document type.




## Team Commissions

This panel highlights performance at the team level, identifying which teams are generating the most revenue, the types of products sold by each, and the percentage contribution of each team member.

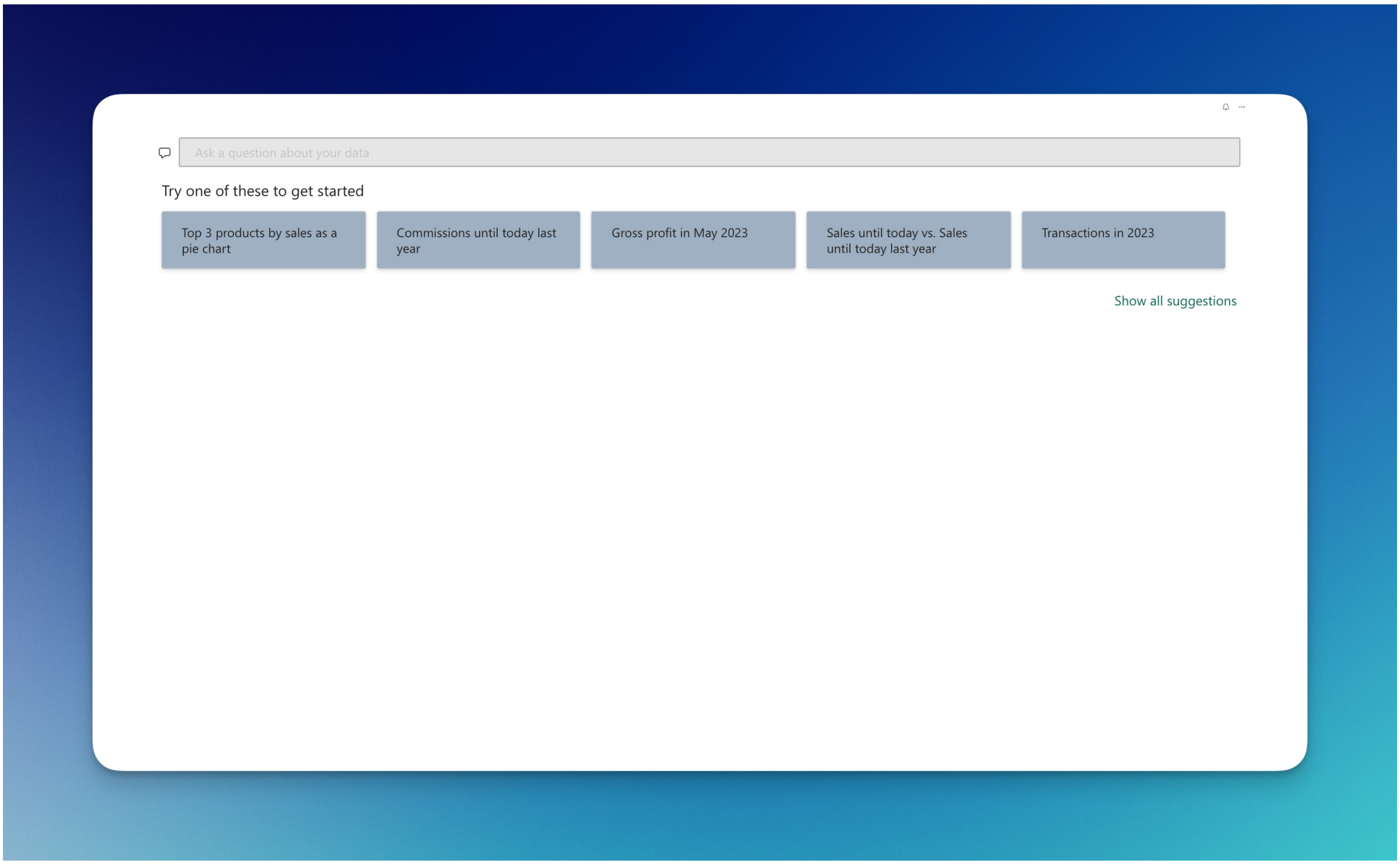
It includes both stacked bar charts and hierarchical views, offering a comprehensive visual summary of team-based sales activity.




## Ask Power BI

Looking for specific data not included in the dashboards above? Use Power BI's natural language query feature to ask questions directly and get insights based on the available data in *iDynamics Commissions Analytics*.

Suggested questions are also available for quick access—simply click on a query to see results immediately.



# Developers

*iDynamics Commissions*, designed for Microsoft Dynamics 365 Business Central, lets you set, follow and settle sales commissions for your sales force.

This chapter is intended for partners and customers that want to customize the app, offering a general overview of how it works, and including examples of some of the most common customizations.

## Overview

iDynamics Commissions extends Business Central with lots of tables, both to set and manage commissions as well as to assign multiple salespeople to sales documents and generate sales statistics.

Here you will get a list of all tables included, to make it easier to develop customizations and use them in reports.

Learn more about all the tables included in the app

## Direct Commission Rates

One of the most common customization requests is to add extra conditions to the commission rates (e.g. so that they only apply depending on custom customer fields, on units sold...). iDynamics Commissions has been designed so that it is very easy to implement this kind of customization.

Learn how to customize direct commission rates

## Sales Amounts

When generating commissions and statistics, iDynamics Commissions uses different values such as *base line amount*, *line margin*, or *applied line discount* that can be redefined using customer customizations.

Learn how to customize the amounts used by the app to generate commissions and sales stats

## Payment Date

iDynamics Commissions calculates de payment date for a sales invoice based on the standard features of Business Central. For certain localizations, such as the Spanish version of Business Central, we have a specific extension that adapts this calculation to local features (e.g. Spanish cartera) that might affect it.

The app lets you adjust how this date is calculated so that it can be adapted to any localization or customer requirements.

Learn how to customize how the payment date for a sales doc is obtained

## Breaking Changes

We do our best not to break anything in our updates. Unfortunately, sometimes changes that might impact customer customizations might be required. This document keeps track of these changes and gives you information on how to solve any problem that might arise from them.

Learn about changes that might affect existing customizations

# Overview

This document will give you a general overview of the objects deployed by iDynamics Commissions so that you can extend the app.

If you have any questions regarding how to customize the app that is not answered in this manual, please do not hesitate to get in touch with us through our support portal.

## Setup Tables

- **IDPCOS Commission Setup**. General configuration options for the app.
- **IDPCOS Salesp. Commiss. Group**. Salesperson commission groups. Used to group salespeople when assigning commission rates, setting sales targets, etc. It will be stored in both the commission entries and its detailed entries.
- **Customer Commission Group**. Customer commission groups. Used to group customers when assigning commission rates, setting sales targets, etc. It will be stored in both the commission entries and its detailed entries.
- **IDPCOS Item Commission Group**. Item commission groups. Can be assigned to items, G/L accounts and resources. Used to group items when assigning commission rates, setting sales targets, etc. It will only be stored in the detailed commission entries.
- **IDPCOS Salesp. Posting Group**. Salesperson posting groups. One must be assigned to any salesperson whose commissions will be settled using invoice documents.
- **IDPCOS Email Setup**. Email setup. Stores the default values for every report that can be sent by email, such as the subject or the default email body.

## Sales Team Tables

- **IDPCOS Sales Team**. Sales teams.
- **IDPCOS Sales Team Member**. Sales team members. A salesperson can be assigned multiple times to a team, with different roles, and can be a member of multiple teams.
- **IDPCOS Sales Team Role**. Team roles that can be assigned to members of any team.

## Additional Salespeople Tables

- **IDPCOS Additional Salesperson**. Salespeople associated with another, either directly, or through a customer or ship-to address. This table defines the additional salespeople that will be assigned to a sales document when the main salesperson is selected.
- **IDPCOS Sales Addit. Salesp.** Additional salespeople in sales headers/lines. They can be automatically assigned from the values set up in the previous table or added manually to the sales document.
- **IDPCOS Invoice Addit. Salesp.** Additional salespeople in posted sales invoices. When a sales invoice is posted, the additional salespeople from the previous table are copied to this one. Only the sales % field can be edited, to update the sales statistics for the document.
- **IDPCOS Cr. Memo Addit. Salesp.** Additional salespeople in posted sales credit memos. Just like the previous table, but for sales credit memos.

## Direct Commission Rates

- **IDPCOS Direct Commission Rate**. Direct commission rates. Define the rules that will decide the commissions generated when a sales document is posted.

### Commission Periods and Sales Targets

- **IDPCOS Sales Target Code**. Sales target codes that can be used across periods. *Example: Furniture*.
- **IDPCOS Period**. A period of time for which sales targets will be defined and commissions given based on them. *Example: 1Q2023*.
- **IDPCOS Period Target**. A sales target assigned to a specific period. *Example: Furniture sales in 1Q2023*.

- **IDPCOS Period Target Line**. A specific target range within a sales target. *Example: a 20% sales margin gives a 5% commission, but a 50% margin gives a 10% commission*.
- **IDPCOS Period Target Stats**. The sales statistics for a particular sales target. When the app calculates sales target commission, a record will be generated for each salesperson that has sales that match the specified targets, with total sales and units, as well as with the average sales margin. *Example: it will contain a record for each salesperson that sold Furniture in 1Q2023 with the total sales amount for each one*.
- **IDPCOS Period Tgt. Stats Line**. Associated with the previous table, it contains a detail of all sales lines that were taken into account to get the amounts and quantities in each *IDPCOS Period Target Stats* record.

# Sales Statistics Tables

- **IDPCOS Sales Stats**. Sales statistics. Every time a sales invoice or credit memo is posted, a record is created with the total amounts (excluding payment discounts and other excluded amounts), regardless of whether it generated any commissions. No salesperson is assigned to this record.
- **IDPCOS Detailed Sales Stats**. Detailed sales statistics. For each record of the previous table, it contains a detailed record for each sales line/salesperson assigned to the source document, splitting the amount between multiple salespeople if needed. Detailed stats will only be created for salespeople who got part of the sales amount (no records will be created for any additional salespeople that do not have a sales % assigned).

Both tables include the sales amount and margin amount, as well as the due date and payment date.

# Commission Entries

- **IDPCOS Commission Entry**. Commission Entries.
  - A record of type *Invoice/Cr.Memo* will be created in this table every time a sales document is posted and a direct commission rate generates a commission for a salesperson.
  - A record of the type *Commission Period* will be created when a commission period or its sales targets are posted, for each salesperson that achieved their sales targets and got commissions from them.
  - *Manual* commission entries can be created manually or using the *Import Journal*.

- **IDPCOS Detailed Commiss. Entry**. Detailed Commission Entries
  - When a sales invoice or credit memo is posted, one record of type *Initial Entry* will be created for each sales line/salesperson that generated commissions.
  - Detailed commission entries of type *Initial Entry* will also be generated when a commission period/sales target is posted, with the achieved commission amounts.
  - When a manual commission is created, a detailed commission entry of type *Initial Entry* is automatically created with the specified amount.
  - *Adjustment* detailed commission entries can be created manually or using the *Adjustment Journal*.
  - Records will also be generated in this table when commissions are settled, or when penalties are generated.

- **IDPCOS Commission Comment Line**. Comment lines for both commission entries and detailed commission entries. If field *Dtld. Commission Entry No.* contains a 0 the comment is for the commission entry, and if it has a value the comment is for the detailed entry no. specified.

# Commission Journals

- **IDPCOS Commiss. Jnl. Template**. Commission journal templates. Once installed, the app will create two templates:
  - ADJUSTMENT. For the adjustment journal.
  - IMPORT. For the import journal.

- **IDPCOS Commiss. Journal Batch**. Journal batches. The app will create one by default for each template, but more can be created as needed.
- **IDPCOS Commiss. Journal Line**. Journal lines. Just like in the rest of Business Central journals.

## Settlement Tables

- **IDPCOS Commiss. Settle. Header**. Settlement header. Used to settle commissions instead of purchase invoices.
- **IDPCOS Commiss. Settle. Line**. Settlement lines. Each line is linked to a commission entry. Its amount can be lowered to create a partial settlement.
- **IDPCOS Post Commiss Settle Hdr**. Posted settlement headers. A posted settlement document will be created when:
  - A settlement header is posted. All its values will be copied to the posted record and the source document will be deleted.
  - A purchase or credit memo that contains commissions is posted. One document will be created for each salesperson, and the posted purchase document nº will be assigned to the posted settlement header.

- **IDPCOS Post Commiss Settle Lin**. Posted settlement lines. A detail of all commissions/amounts posted in the source settlement or purchase document.

## Commission Penalty Tables

- **IDPCOS Delayed Payment Penalty**. Define penalty rules for invoices that have not been paid in due time.
- **IDPCOS Commiss. Penalty Error**. Error log for the penalty generation process. If a commission entry is found for which a penalty should be created, but it's not possible to do so (e.g. because it's currently being settled), a record will be created in this table.

## Temporary Tables

The following tables are a temporal copy of their equivalent (non-temporary) tables, used when calculating commissions and sales stats. This table exists so that, for example, all of these processes are identical regardless of the source document (invoice, credit memo...)

- **IDPCOS Commiss. Sales Header**. Contains the data from the source document (sales header, sales invoice header, sales cr. memo header) for which commissions or sales stats are going to be generated.
- **IDPCOS Commiss. Sales Line**. Contains the data from the source document *line* for which commissions or sales stats are going to be generated.
- **IDPCOS Commiss. Additional**. Contains a copy of all the additional salespeople that are assigned to the document for which we are calculating commissions or sales stats.

## Extended Tables

*Salesperson/Purchaser*, *Customer*, *Vendor*, *Item GL Account* and *Resource* now include new fields in order to assign them to commission groups. The *Salesperson/Purchaser* table has some extra additional configuration fields, as described in the main help.

Tables *Sales Cr.Memo Header*, *Sales Header* and *Sales Invoice Header* now include a computed field that shows whether additional salespeople have been assigned to each document. In addition, the lines for each of these documents now include fields to assign the particular salesperson or commission that applies to them.

*Purchase Header*, *Purch. Cr. Memo Header*, and *Purch. Inv. Header* also include an extra field that gives you information on whether the document has been used to settle commissions. Lines for those documents also include a new field that links to the No of the settled commission entry.

In all cases, fields added by the app can be easily found, as their names all start with *IDPCOS*.

## Customization Events

The app includes many events destined to make it easy to customize to the needs of each customer. In the next sections of the manual, you will find detailed information on the events needed to customize the main features of the app, but this will not be a complete list.

Remember that you can use the event recorder in Business Central to get a list of all the events available in each process and that you can contact us through our support portal if you have any questions on how to develop any customization.

# Direct Commissions

## Set Specific Sales Line Commission

Sales lines contain a hidden *IDPCOS Manual Commission %* field. If any value different from zero is specified, this will be the percentage used to generate commissions, regardless of any commission rates that might apply.

If needed, this field can be shown in the UI or filled in by code in order to specify a commission %, ignoring any existing commission rates.

## Add New Filters

### Description

If a customer wants to be able to set direct commission rates based on custom fields in their environment, iDynamics Commissions makes it easy to do so.

In order to add custom filters:

- Extend the "IDPCOS Direct Commission Rate" table, and add the filter fields requested by the customer.
- Subscribe to the *OnAfterCheckDirectCommissionRateAppliesToSalesLine* in codeunit "IDPCOS Direct Comm. Entry Mgt.". This event lets you say whether a commission rate applies (or not) to a sales line.

### OnAfterCheckDirectCommissionRateAppliesToSalesLine

Let's expand the event that must be used to extend the available filters. You would subscribe to the event, with a code such as this one:

```
[EventSubscriber(ObjectType::Codeunit, Codeunit::"IDPCOS Direct Comm. Entry Mgt.",
'OnAfterCheckDirectCommissionRateAppliesToSalesLine', '', true, true)]
local procedure OnAfterCheckDirectCommissionRateAppliesToSalesLine(
    CommissionRate: Record "IDPCOS Direct Commission Rate";
    var TempCommissSalesLine: Record "IDPCOS Commiss. Sales Line" temporary;
    var TempCommissSalesHeader: Record "IDPCOS Commiss. Sales Header" temporary;
    var Applies: Boolean)
begin
    if not Applies then
        exit;

    // Check whether the custom condition applies or not and set Applies accordingly.
    if Condition then
        Applies := false;

end;
```

Setting the Applies variable to false, you can specify that an extra restriction set on the rate was not met and that it should not apply. Note that the rate might already have been discarded. That's why, in the example, the code directly exists if the value is already false.

### Event parameters

To understand when the previous event is raised, and what the different parameters are, it's helpful to know that, in order to check whether a commission rate applies or not to a sales line, iDynamics Commissions does the following:

- It transforms the Sales Header (if we are previewing commissions), Sales Invoice Header or Sales Cr.Memo Header into a temporary *IDPCOS Commiss. Sales Header*.
- Fields *“Source Doc. Type”*, *“No.”*, and *“Sales Header Document Type”* (if it’s a Sales Header) will tell you the actual record from which this temporary record was created.
- Same thing with the Sales Line/Sales Invoice Line/Sales Cr.Memo Line. In this case, the app can create several temporary

records depending on how many salespeople are assigned to the line (e.g. one for the main salesperson, one for the manager).

Once we have a temporary header and a temporary line for each combination of sales line/salesperson that might receive a commission, for each line:

- The app gets all commission rates that might apply, based on the customer/item/salesperson assigned to the line. These rates are looped by the app, to check whether either of the conditions that have to be checked by code (e.g. dimensions) apply or not.
- It is at this moment where the previous event is raised, with each one of the three mentioned records passed as parameters (temporary header, temporary line, commission rate).

Note that the *IDPCOS Direct Comm. Entry Mgt.* codeunit has many other events that might be useful for your customizations. In most of them, you will find the same temporary records as the *OnAfterCheckDirectCommissionRateAppliesToSalesLine* event.

# Customize Amounts

iDynamics Commissions includes several events that let customers customize how the different sales amounts are calculated.

## Sales Amount

For iDynamics Commissions, the amount of any sales lines is the line amount before taxes, and before any payment discounts, in local currency. This amount will be used in statistics, when the amounts sold by each salesperson are shown, and as the commission base, if commissions have been configured to use this value.

If you want to customize it, the *IDPCOS_OnBeforeGetSalesAmountLCY* event, raised by the *Sales Line*, *Sales Invoice Line* and *Sales Cr.Memo Line* tables, will let you alter the way it is calculated.

```
local procedure IDPCOS_OnBeforeGetSalesAmountLCY(var SalesInvoiceLine: Record "Sales Invoice Line"; var SalesAmountLCY: Decimal; var Handled: Boolean)
```

The event receives the (sales, sales invoice or sales credit memo) line for which we want to calculate its sales amount, a SalesAmountLCY that lets you specify a custom amount, and a Handled variable, that will tell iDynamics Commissions that this value has been already calculated if set to true.

> **NOTE**
>
> You can also subscribe to the *IDPCOS_OnAfterGetSalesAmountLCY* event, on the same tables, if you just want to make adjustments to amount calculated by the app.

## Line Cost

The cost will be used to calculate the profit margin of the line. By default, iDynamics Commissions uses the costs calculated by Business Central (including the adjusted cost, if it has changed since the sales invoice was posted), but you can override this by subscribing to the *IDPCOS_OnBeforeGetTotalCostLCY* event, raised by the tables *Sales Line*, *Sales Invoice Line* and *Sales Cr.Memo Line* (if you reference iDynamics Commissions in your app):

```
local procedure IDPCOS_OnBeforeGetTotalCostLCY(var SalesCrMemoLine: Record "Sales Invoice Line"; var TotalCostLCY: Decimal; var Handled: Boolean)
```

The event receives the (sales, sales invoice or sales credit memo) line for which the commissions are going to be calculated, a TotalCostLCY that lets you specify a custom cost in local currency, and a Handled variable, that will tell iDynamics Commissions that this value has been already calculated if set to true.

## Profit Margin

This amount is the result of subtracting the total cost for the line (unit cost x quantity) from the value returned by the previous method. It can be customized using the *IDPCOS_OnBeforeGetProfitMarginAmountLCY* event, also raised by tables *Sales Line*, *Sales Invoice Line* and *Sales Cr.Memo Line*:

```
local procedure IDPCOS_OnBeforeGetProfitMarginAmountLCY(var SalesInvoiceLine: Record "Sales Invoice Line"; var ProfitMarginAmountLCY: Decimal; var Handled: Boolean)
```

The event receives the (sales, sales invoice or sales credit memo) line for which we want to calculate its profit margin, a ProfitMarginAmountLCY that lets you specify a custom amount, and a Handled variable, that will tell iDynamics Commissions that this value has already been calculated if set to true.

For direct commissions, this method will be called each time a sales invoice or a sales credit memo is posted. For commissions based on sales targets, though, this method will be called when the commission period is posted.

# Base Amount

Both direct commissions and sales targets can be configured to use sales amounts or profit margins. The app uses a *GetBaseAmountLCY* method that will call one of the two previous methods, depending on the configured value. This can also be customized using the *OnBeforeGetBaseAmountLCY* event, raised by the table *IDPCOS Commiss. Sales Line*:

```
local procedure OnBeforeGetBaseAmountLCY(var TempCommissSalesLine: Record "IDPCOS Commiss. Sales Line";
BaseAmountCalcType: Enum "IDPCOS Base Amount Calc. Type"; var BaseAmountLCY: Decimal; var Handled: Boolean)
```

This method receives as a parameter the type of amount to use (base or margin) and invokes one of the two methods mentioned previously in this document.

# Line Discount

If you want to customize the effective line discount for a sales line or learn how the app calculates it by default:

1. The app first calculates the *Actual price applied to the line*, which is the amount obtained after applying the Line Discount % to the (Unit Price * Quantity) and, to the result, applies the Invoice Discount %. The result is divided by the amount. The Payment Discount is not taken into account. That is, it is the "VAT Base Amount" field of the line divided by the quantity + "Pmt. Discount Amount" divided by the quantity.
2. This price is compared with the *default sales price* that Business Central would have applied by default to the line.

In summary, the effective discount % is: **(default sales price - actual price applied) / default sales price**.

This means that iDynamics Commissions will treat any of these as discounts:

- Manually changing the unit price.
- Assigning a discount % to the line.
- Applying a document discount (except payment discounts).

Finally, if you want to customize this calculation, you can subscribe to the *OnAfterCalculateProfitabilityAndRealLineDiscount* in the temporal table *IDPCOS Commiss. Sales Line*. When commissions are generated, the app creates a copy of the source sales line in this table and raises the event after calculating the profit margin and the line discount. You can update the *Real Line Discount %* field, in order to set a different discount % that will be used when checking commission rates and generating commissions.

# Sales Invoice/Cr. Memo Payment Date

By default, iDynamics Commissions checks the customer ledger entries generated by an invoice to get the date when the customer paid its corresponding amount.

## Customizing the Payment Date

Each time that the app checks whether a sales document has been paid, and when, the following event is raised by the codeunit *IDPCOS Doc. Collection Helper*:

```
local procedure OnBeforeGetSalesDocPaymentDateAndStatus(PostedSalesDocType: Enum "IDPCOS Posted Sales Doc. Type"; DocNo: Code[20]; DelayPaymentMargin: DateFormula; var PaymentDate: Date; var Status: Enum "IDPCOS Payment Status"; var Handled: Boolean)
```

The event has the following parameters:

- PostedSalesDocType. This tells us whether we are checking the payment date of an invoice or a credit memo.
- DocNo. The identification number of the invoice or credit memo.
- DelayPaymentMargin. The document status can be *collected, pending, or unpaid*. By default, it changes from pending to unpaid when the current date is later than the expected date with this formula applied.
- PaymentDate. Set a value to this variable to return a customized date.
- Status. If the payment date has been updated, the document status must also be returned.
- Handled. If set to true, the app will use the values specified in the PaymentDate and Status variables.

If needed, the app also rises, in the same codeunit, an event when obtaining the document *due* date:

```
local procedure OnBeforeGetSalesDocDueDate(PostedSalesDocType: Enum "IDPCOS Posted Sales Doc. Type"; DocNo: Code[20]; var DueDate: Date; var Handled: Boolean)
```

This time the event receives the two variables that identify the source document, and DueDate and Handled can be used to override the default value obtained by the app.

# Breaking Changes in Version 5.1

## Summary

Version 5.1 includes some changes to additional salespeople, detailed commission entries, and sales stats, that might affect customizations or reports. If you have any extensions or custom reports that use data from these tables, please read below.

> **IMPORTANT**
>
> We do our best not to break anything in our updates. Unfortunately some changes were required in order to pave the way for all of the features that we intend to implement in the future, and all of them have been introduced in this release.
>
> We have done our best to minimize its impact but, if you have any customizations based on our app, please update it first in a sandbox and check any warnings that might appear. As mentioned at the end of this document, if you have any questions or doubts related to this changes, please, do not hesitate to contact us.

## Additional Salespeople

Due to all the improvements added to additional salespeople in this version, we've decided to rename the old tables (all of which included the word "split" in their name, as that was its original purpose). The basic structure of the table is the same, though, so if you had any references to this table, you should be able to just change the reference to the new table/page name (as shown in the warning that you will receive) and be good to go.

## Commission Entries

The previous "Base Amount" field has been split in two: "Sales Amount (LCY)" and "Margin Amount (LCY)". This way both amounts are available in the table, and the field names are more correct with the values stored in them.

## Detailed Commission Entries

The table has been renamed from "IDPCOS Commiss. Detailed Entry" to "IDPCOS Detailed Commiss. Entry". There have been several internal changes to this table, in order to make it easier to extend and use in reports, but these should not affect most customizations based on this table, which should work fine just by changing the table name.

Note that, for now, the old "IDPCOS Commiss. Detailed Entry" will still exist and be updated when commissions are generated, so that existing customized reports will keep working just fine when you upgrade to v5.1. We do recommend you to update your reports and customizations to the new table, though, so that they keep working when the table is finally obsoleted, and in order to access all of the new info that is/will be included in the new table.

## Sales Statistics

While sales statistics were being generated in previous versions of the app, these were mostly internal use of the app. In this version statistics have been greatly improved, not to help in the processes of the app, but also to be useful in external PowerBIs and reports.

If you were using "IDPCOS Global Sales Stats" in any way, this table has been replaced by "IDPCOS Sales Stats", that contains a record for each sales invoice or credit memo in the app, including extra info such as the effective payment date and generated commissions.

In addition to that, "Salespeople Sales Statistics" has been replaced by "IDPCOS Detailed Sales Stats", that includes detailed info on the amounts that belong to each of the salespeople involved in the sale.

> **NOTE**
>
> In previous versions, when an additional salesperson was getting part of the main salesperson commission, the specified % was taken into account as if the additional salesperson had achieved that % of the sale towards any specified sales targets, but this amount was not being taken from the main salesperson, so both of them were getting that amount recognized toward sales targets. Now there is an option to specify how the sales amounts should be split, and additional salespeople will not get assigned any part of the sale unless specified explicitly.

## Events

Any event that referenced one of the tables marked as obsolete has also been marked as obsolete. Events that were raised when obtaining the payment date of a particular invoice have also been marked as obsolete.

All of this events will still be raised in the current version, so any customizations that used them should still work, but the events will be removed in a future version, so we recommend you to migrate to the new ones (as specified in the warning that you will get for each one of them).

## Further info

If you had any customizations or reports based on any of this tables and have questions on how to migrate them to the new version, please do not hesitate to contact us through our support portal.

# What's new - iDynamics Commissions

## Version 6.4

- New feature to define project-specific commission rates. These let you generate commissions based on the actual project margin, rather than on the posted invoices.
- You can now manually assign a flat commission to a sales document.
- The *Commissions* menu has been added to the *Accountant* role center.
- Fixed: when accruals were enabled, delegate admins could not post sales documents.

Published: August 12, 2025

## Version 6.3

- New filters for commission rates: set commissions that apply only during a customer's first year, or the first time that an item is sold, among other options.
- When accruals are enabled, they will now be posted automatically when commissions are generated, without the need to activate the scheduled task.
- You can now assign a flat commission to the additional salespeople assigned to a document.
- New option to exclude specific project planning lines from receiving commissions.

Published: June 2, 2025

## Version 6.2

- You can now create commission rates that apply specifically to documents with a negative margin.
- A new option lets you specify that a commission rate should ignore the actual margin achieved (there is no need anymore to set negative margins).
- You can now configure whether accruals should be posted on the date that the original invoice was posted, or on the date that the accruals were posted (if both dates are different).
- Advanced filters can now be based on dimensions.
- The series numbers for purchase documents that settle commissions can now be customized.
- There is a new option to specify that dimensions should be copied from the commission entries to purchase lines.
- Salesperson Rules are automatically reapplied when the territory of a sales document is updated.

Published: May 5, 2025

## Version 6.1

- Manage commissions in multiple currencies. You can now specify the currency in which commissions should be generated for each salesperson, and handle commissions for different countries from the same Business Central company.
- Preview commissions in projects: the commission preview factbox is now also available for planning lines.
- You can now give commission advances for projects, paying part (or all) of the commissions when the project is started.
- Assign specific salespeople to project tasks. You can now have salespeople assigned to the project, by task, or even by planning line.
- We've simplified the way salespeople are copied from projects to sales documents. Unless multiple projects are invoiced together, the salespeople will now be assigned to the document header rather than by line.
- You can show two new fields (*Salesperson Filter Description, Customer Filter Description*) in the list of commission rates, if you'd like to see the name of the salesperson, customer, team, or commission group assigned to the rate (in addition to its code).
- Commission rates can now be configured for discounts higher than 100%.
- Minor bug fixes and improvements.

Published: March 6, 2025

## Version 6.0

- You can finally accrue commissions.
- Generate commissions for prepayment documents.
- Improved payment stats.
- New option to condition direct commissions on the document margin.
- Sales target periods can now take into account partial payments.
- Payment discounts can optionally be deducted from direct commissions.
- New permission set for users that should be able to edit additional salespeople but not see posted commissions.
- Easily see all teams assigned to a salesperson.
- New option to see and analyze detailed commission entries.
- If you are a developer or have customizations, there have been a few breaking changes related to sales targets that you should review.

Published: September 25, 2024

## Version 5.9

- You can now assign salespeople and define splits for project planning lines.
- New option to assign a specific commission % to a project.
- The description and posting date of posted settlement documents can now be updated.
- New option to specify the desired posting date of settlement documents when they are generated.

Published: June 28th, 2024

## Version 5.8

- New option to define advanced filters for rates and targets (e.g., specify that a rate should apply to all chairs except one).
- New options to edit the salespeople assigned to posted documents.
- Set a commission scaling for sales targets, based on the margin achieved.
- New options when generating commissions for a sales target (hold commission %, don't generate negative commissions).
- Restored option to generate commissions for all sales targets in a period.
- Lock the salespeople assigned to a project/job.

Published: April 3rd, 2024

## Version 5.7

- Assign salespeople, teams and additional salespeople to projects/jobs.
- New reports to preview commissions for sales documents that have not yet been posted.
- You can now add a description to commission rates.
- The posting date of settlement documents can be manually specified.
- New permission sets that allow more granular access to the application.
- Lots of minor bugfixes and improvements.

Published: January 30th, 2024

## Version 5.6

- Set sales targets for managers/roles, so that they get commissions based on the performance of the salespeople in their charge.
- Pay commissions when partial payments are received.
- New process to update commissions based on adjusted costs.

- Split commissions by sales team.
- New sales target stats detailed report grouped by invoice.
- Commission rates can now also be defined for item charges.

Published: November 22nd, 2023

# Version 5.5

- Give commission advances/draws directly from a sales document, based on the commissions expected for the document.
- Link commission advances/draws to the posting or payment of a sales document.
- Define specific commission rates for sales below cost (e.g., so that the negative margin is deducted from the commissions).
- New action to specify that the selected commission entries should not wait for the customer to pay the source invoice.
- New Detailed Commissions by Salesperson report. Useful if you want to view/share the commissions by sales line instead of by document.
- Added option to regenerate delayed customer payment penalties, when you run the *Generate Penalties...* action.

Published: June 30th, 2023

# Version 5.4

- Salesperson rules now let you add additional salespeople to documents. This can be used to pay royalties for certain items or to give additional commissions based on different rules.
- You can now set direct commission rates and sales targets based on sales territories.
- Improved commission per unit rates and targets based on units sold. You can now define a commission unit of measure for each item that will be used in these cases.
- Two new wizards were added to help new customers set up direct commission rates and sales targets.
- The design of settlement documents is now available in Word so that it can be easily customized.
- Milestones can now be used when you set a common target for everyone, by specifying a reference target amount.
- Sales target commissions can now be deleted (and regenerated) if they have not yet been settled.
- New customization events for salesperson rules.

Published: May 1st, 2023

# Version 5.3

- Define salesperson rules: use this new feature to assign salespeople to a document (or its lines) based on the item sold or the sales territory assigned to the customer or ship-to address.
- New journal to import sales stats if there are sales generated outside BC that should be taken into account for sales targets.
- New option to specify targets and rates for a specific sales team.
- Action bars updated to the new design introduced in Business Central 2022 Wave 2.
- Added the option to add attachments to salespeople, sales teams, and settlement documents.
- New assisted setup guide for new users, when the app is installed from App Source.
- New option to take into account invoices posted **and collected**, when defining sales targets.
- Changed: milestones cannot be defined for specific sales targets (all targets in a period will share the same milestones). After a lot of consideration and feedback since the last release, we feel that this is much more user-friendly, and will make it easier to improve the reports and actions that are currently available on the period card.
- For Spanish customers: DIN A4 layouts are now the default when you install the Spanish localization.
- Lots of minor fixes and improvements.
- Now also available in French. *Oh là là!*

Published: March 20th, 2023

# Version 5.2

- New and improved ways to define sales targets:
  - Set a different sales target amount for each salesperson included in the target.
  - Define milestones and which % of sales should be achieved in each one.
  - Pay commissions at any point in time of the period, be it a milestone or a specific date.
  - New and improved reports, customizable using Word.
  - Extensible: the new targets have been designed so that it's easy to customize them by adding extra filters or conditions to them.

- Commission advances/draws. Advance commission amounts to your salespeople and track their return.
- Sales & commission factboxes. Configure the current commission period and get factboxes for items, customers, salespeople, teams and commission groups showing current sales for the period, commissions and extra stats.
- New calculation criteria for commission rates: now you can define that the app should apply the *lowest* commission rate.
- New filters for commission penalties, so that you can define different penalties based on the salesperson or customer to which the invoice belonged.
- Improvements to the Commissions by Vendor report, including the option to email in bulk.
- You can now set a global commission % to a specific sales document manually, instead of line by line.
- Sales lines can have a manual-specific commission amount (not just a manual %) assigned to them.

Published: January 3rd, 2023

# Version 5.1

- New options for additional salespeople in a sales document:
  - Split the commission from the main salesperson
  - Set a specific commission for the document/line.
  - Apply the default commission rate.
  - Set specific rates for additional salespeople.

- New Word commission reports (by salesperson and by vendor), designed to be extended/customized by customers.
- New and improved sales statistics, including payment info and details on who took part in each sale and how the amounts were split between them.
- Define commission penalties for unpaid invoices.
- Lock the salespeople assigned to a sales document so that they won't be updated by mistake.
- New Commissions menu added to the *Business Manager* and *Sales & Mkt. Manager* role centers. Use the new menu to easily access all of the features offered by iDynamics Commissions.
- Customize the commission base % for each sales document. This lets you specify that a salesperson should only get commissions on a % of the invoice total amount, for example.
- New commission factboxes in posted sales documents let you view at a glance all the commissions generated by the document and its lines.
- Improved commission preview factbox: now updates in real-time and shows commissions for new lines.
- Improved descriptions and visible fields in the commission entries list.
- New invoice factbox in the commission entries list showing payment info regarding the source invoice.
- Improved detailed entries. This is mostly a technical upgrade for future improvements, but if you had any customizations/reports based on this table, please check this document.
- Add comments to both commission entries and detailed commission entries.
- Commission groups added to both the item and customer templates.
- Lots of minor improvements to the user interface and performance.

Published: June 30th, 2022

# Version 5.0

- Sales Teams - define teams and roles within a team.
- New commission adjustment journal.

- New commission import journal.
- New option to manually create commission entries.
- Commission factbox for sales lines: preview commissions and check the margin and effective discount that will be used when calculating commissions.
- New guided tours added for most pages.
- All commission reports are now available from the list of commission entries.
- When using purchase documents to settle commissions, only an invoice or credit memo will be generated for each vendor, even if there are both positive and negative commissions.
- Fixed: commission reports will show amounts on the date that the document was posted, regardless of any commission reassignments.
- Lots of improvements to available actions, and visible fields, on all pages of the app.

Published: March 09, 2022

## Version 4.6

- New options to mass-update the salesperson assigned to active sales documents.
- New option to replace a salesperson.
- List of salespeople assigned to each customer ship-to address.
- You can now modify the code of item, customer, and salespeople commission groups.
- Fixed: disabled and external BC users were consuming iDynamics Commission licenses.

Published: January 14, 2022

## Version 4.5

- New option to configure salespeople assigned to ship-to addresses.
- Set additional salespeople for customers, both for the customer and/or its ship-to addresses
- It is now possible to post several settlement documents at once.
- Fixed: error when updating salesperson commission groups using the Reassign Sales Documents... feature.

Published: November 12, 2021

## Version 4.4

- Define sales targets based on the profit margin % achieved by each salesperson.
- In-app tours for direct commission rates and sales targets.

Published: September 15, 2021

## Version 4.3

- Use of enhanced email capabilities if the feature is active.

Published: April 1, 2021

## Version 4.2

- New simplified UI to set up direct commission rates.
- Set direct commission rates for resources and GL/Accounts.
- Set direct commission rates based on dimension values.
- Set sales targets based on dimension values.
- Reassign generated commission amounts to a different salesperson.
- New action available to update commission groups in active sales documents.
- Developers: the "Direct Commission Rate" table has now been designed to be extensible.

- Lots of small improvements.

Published: December 21, 2020

# Version 4.1

- Mass email individual reports (monthly commissions, settlements...) to your salespeople.
- Set commissions and sales targets based on sales margins.
- Added print layouts for settlement documents, so that they can be printed, emailed, or saved as PDF.
- New Commission Entries report.
- Ignore selected sales lines (e.g. shipping costs) from sales statistics.
- New option to reassign sales documents in bulk.
- Manually create detailed commission entries.
- Lots of small improvements.

Published: June 22, 2020

# Version 4.0

- Compatible with Microsoft Dynamics Business Central 2020 (wave 1).
- Contains all improvements included in v3.2.

Published: April 1, 2020

# Version 3.2

- Set sales targets for a period and configure commissions for them.
- New reports for sales targets and commission periods.
- New Basic permission set. Salesperson users with this role will be able to run commission reports (filtered by their salesperson code).
- You can now use both purchase and settlement documents to *partially* settle commission entries.
- New options to cancel and put on hold commission entries.
- The commission amounts in detailed commission entries can be now manually adjusted.
- New option to generate direct commissions for sales documents posted before the app was installed.
- Preview commission entries before posting a sales document.
- Small fixes and improvements.

Published: March 16, 2020

# Version 3.1

- New commission settlement document.
- Split commissions with other salespeople, both for a whole document or specific sales lines.
- New sales, commission, forecast, and settlement reports.
- Manually set commissions for each sales line.
- Reassign individual sales lines to a salesperson different from the one assigned to the sales document.
- Manually set commissions for resource and G/L account sales lines.
- New *Stats Group* entity, used to filter reports and statistics.
- Commission entries inherit dimensions from the original sales document/lines.
- Support for sales documents in currencies different from the local one.
- Settle commissions for multiple salespeople through a single vendor.
- New customization events.
- Lots of small fixes and improvements.

Published: November 12, 2019

## Version 3.0

- Upgraded to Business Central 15 (2019 wave 2).

Published: October 1, 2019

## Version 2.3

- UX improvements.
- Small fixes and improvements.

Published: March 28, 2019

## Version 2.2

- App updated/redeveloped as a Business Central v2 extension.
- Lots of small fixes and improvements.

Published: January 16, 2019

# Licensing

## How is iDynamics Commissions licensed?

*iDynamics Commissions* is offered on a pay-per-use basis to Business Central, with a fixed monthly price that gives access to unlimited users, based on the number of salespeople for which commissions are generated each month. Subscription prices can be found on our product website.

## Try iDynamics Commissions in an Evaluation Company

Regardless of the number of users, you can try all features of the app by installing it from App Source in an Evaluation company. All features will be available in companies checked as *Evaluation Company* in Business Central, with no extra steps required, and no time limits.

## Activate a Trial Period

In addition to that, if you want to try the app in your production environment or a copy of it, you can activate a 15-day trial once the app has been installed (a notification will be shown with an action that starts the trial period).

If you need to extend this 15-day trial period, please contact us through the sales@idynamics.es email address.

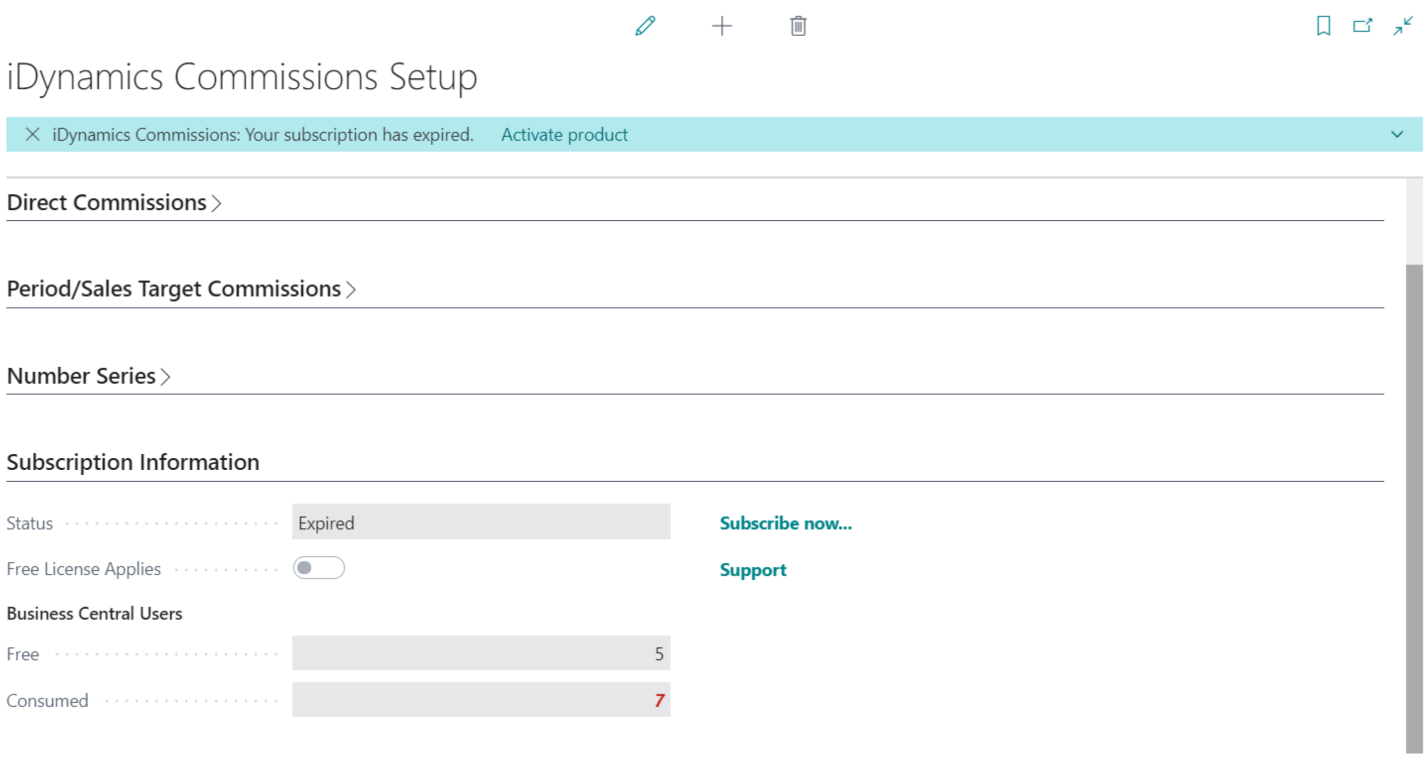
## Contact, Pricing and Further Questions

If you or one of your customers is interested in iDynamics Commissions, and have any questions or need more information, please contact us at sales@idynamics.es.

Prices are available on our website: idynamics-commissions.com

## Check Subscription Status

In the general setup screen for iDynamics Commissions, you will find a *Subscription Information* section, where the subscription status is shown.



The status can have the following values:

- No Subscription
- Trial
- Trial Expired
- Active
- Expired

If the subscription is not active, information about the number of credits consumed versus the number of hired credits is displayed. In *iDynamics Commissions*, this number of credits corresponds to the number of Business Central users of type *Full User*.

In addition to that, you will find links to our support portal and a link with which to activate the trial or full subscription, if no active subscription is found.

# Frequently Asked Questions

## Description

This document tries to gather the most frequent questions related to the features included in the app.

## Can I try the app?

Sure! Just install it from AppSource into a Sandbox with a demo company and all its features will be automatically enabled. If you want to try it with your data, a notification will be shown in the role center asking you to activate the 15-day trial. Just tap on the notification and all its features will be unlocked.

We truly believe that our app is the best commission management app for Business Central, and the best way to prove it is to give you the option to try it freely.

## Can commissions be held until the customer pays?

Yes. You can decide whether commissions can be paid directly after a sale has been posted, or only after it has been collected. You can even set sales targets based on invoices *collected* during a period.

## How are commission payments reflected in Business Central?

Once commission entries are generated, they can be paid using purchase invoices or exported into your payroll software. For purchase invoices, you can specify the GL/Account used for commissions, and purchase lines will be assigned to it (the purchase invoice will be posted just as any other invoice in BC). If you export internal commissions into your payroll software, we will track commission payments but will not reflect their costs into BC, as we expect you to import them along with the rest of the payments from your payroll software.

## How do I update to a new version of the app?

This is not particular to our app, but we get asked about this a lot: currently, there is no "Upgrade" button available in Business Central, and the only way to upgrade apps is by uninstalling the app (important: do not check the option to delete its data) and install it again from App Source, or by using the action available in the Admin Center.

If you don't want to upgrade manually when a new version is released, the app will be also automatically upgraded to its latest version any time that your Business Central is upgraded to a new major version. We recommend that you check our changelog when this happens, to discover all the new features available.

## Can commission rules be customized/extended?

Yes, we know that customers might have some very specific conditions that depend on custom fields or very specific scenarios that can't be included by default in our app. Because of this, we have intentionally designed our app to be easily extendible, and have a whole chapter of the user guide dedicated to developers. Also, if needed, both our partners and ourselves offer customization services.

## Can I generate commissions for documents posted before the app was installed?

Commissions can be generated for sales documents posted before the app was installed, by using the *Update Commissions/Stats...* action, available in the *Posted Sales Invoices* and *Posted Sales Credit Memos* lists. This will update all item, customer and salesperson groups, generate any direct commissions that have been configured, and update all sales statistics. If you have defined any sales targets, updating these commission groups will let you define and calculate commissions and sales targets for these documents.

## How are commissions settled?

The app lets you settle commissions using a new entity called *Commission Settlement*, or purchase invoices when working with external salespeople. Commissions can be settled after a sale has been posted, or only after its payment has been collected.

As it is common to include commissions in the employee's salary, but Business Central does not include any payroll management features, these *Commission Settlement* documents give a summary of how much should be paid to each employee but do not generate any G/L entries.

This way, you can use the information provided by the app to easily include these amounts in the payroll software used by your company or, if you have deployed payroll features into Business Central, use the included customization events to automate its integration.

## Are invoices and credit memos posted from journals supported?

When entering invoices or credit memos through journals, there are no options to specify the particular commission that applies and, due to the lack of any information regarding the items included in the document, no item commission rates apply. Due to this, no commissions will be generated when you post a document using a journal.

## Anything you didn't find here?

Please, don't hesitate to drop us an email at sales@idynamics.es or contact us through our support portal.