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## Commission Rate Table by Salesperson/Customer/Item Number

SO-1354

### Overview

This Extended Solution adds a Commission Rate Maintenance program which allows you to specify Commission Rate (percentage or flat dollar amount) by combinations of salesperson/customer/item number. An Effective Date can be associated with the record which will be compared with Invoice date to determine which commission record to use.

Additionally a Commission by Division program has been added to allow alternate commissioning to take place for salesperson/item records when the customer on the order belongs to a division with a record in this file.



The Inventory Management 'Calculate Commission by Inventory Items' Setup question must be checked in order for this Extended Solution to function.

This product is not intended to be used in conjunction with the Override commission method.

### Installation

Before installing this Extended Solution, please verify that the version level(s) printed on the CD label are the same as the version level(s) of the MAS 90 MAS 200 module(s) you are using. For further information, please see the Upgrades and Compatibility section below. Check your Shipping Manifest for a complete list of Extended Solutions shipped.

For detailed installation instructions, please refer to the Sage website at:

[http://support.sagesoftwareonline.com/mas/extended\\_solutions/main.cfm](http://support.sagesoftwareonline.com/mas/extended_solutions/main.cfm)

### ***Installing Your Extended Solutions under Windows***

#### **From a CD**

If you have the *autorun* function turned on for your PC, the installation program will start up automatically. If not, find the **autorun.exe** file on your CD-ROM drive and double-click it to start the installation program. Follow the on-screen instructions.

#### **From the Sage FTP site**

When your Extended Solution is ready to be downloaded, you will receive an email from 'extendedsolutions.na@sage.com' telling you that it is ready. The email will contain the Customer Name, Cross Reference, a case-sensitive Password, a link via which you can download your Extended Solution, instructions, and a Shipping Manifest. If you have any problems with this order, please email [extendedsolutions.na@sage.com](mailto:extendedsolutions.na@sage.com) and we will assist you during normal business hours.

## Extended Solutions

**Extended Solutions Control Center**

Installing any Extended Solution will add an Extended Solutions Control Center to the MAS 90 MAS 200 Library Master Utilities menu. When you open the Control Center, the following options will be available:

- Extended Solutions Manuals
- Remove Extended Solutions
- Unlock Extended Solutions
- Merge Installation Files
- Extended Solutions Setup options

**Setup**

Upon completion of software installation, you will need to access Extended Solutions Setup from the Sales Order Setup menu. Select this part number and the Setup screen for this Extended Solution will appear (Figure 1). Check the 'Enable Extended Solution' box to activate this Extended Solution. The manual for this Extended Solution can be viewed by clicking the 'Manual' button next to the 'Enable Extended Solution' check box. It can also be viewed via the Extended Solutions Control Center (see Installation, above).

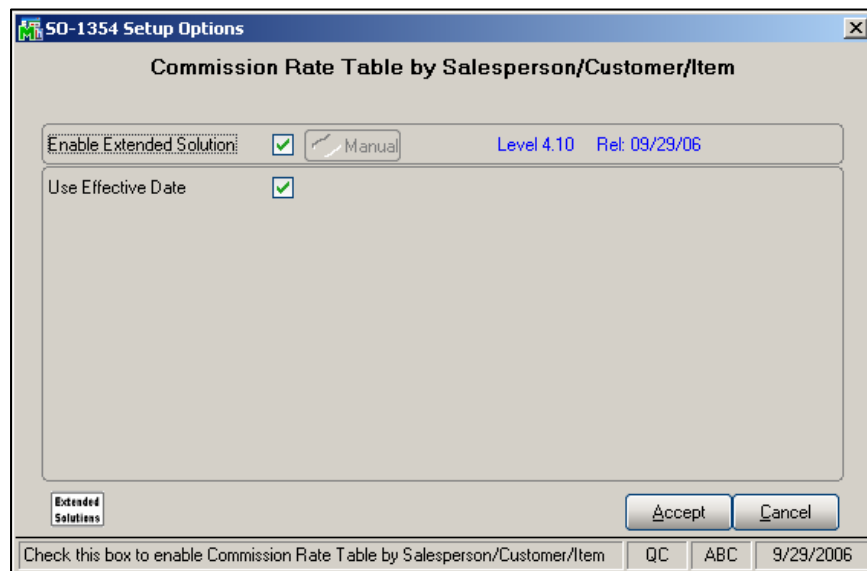


Figure 1

Answer the following prompt:

**USE EFFECTIVE DATE:** Check this option to add an Effective date that will be compared with Invoice date to determine which Commission record to use.

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**Role Maintenance**

The following Tasks have been added to Sales Order, Maintenance/Data Entry:

- Commission Rate Table Maintenance
- Commission by Division Maintenance

You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

**Operation***Commission Rate Table Maintenance*

This option can be found on the Sales Order Setup menu (Figure 2).

The screenshot shows a software dialog box titled "Commission Rate Table by Salesperson/Customer/Item". It contains several input fields and buttons. The "Salesperson" field is set to "01-0100" with a magnifying glass icon and the name "Jim Kentley". The "Customer No" field is "01-BRESLIN" with a magnifying glass icon and the name "Breslin Parts Supply". The "Item Number" field is "1001-HON-H254" with a magnifying glass icon and the description "HON 4 DRAWER LETTER FLE W/D LK". The "Effective Date" field is "9/29/2006" with a calendar icon. Below these fields, the "Commission Rate" is set to "15" and the "Rate Type" is set to "Percentage" in a dropdown menu. At the bottom of the dialog, there are four navigation buttons (Back, Forward, Home, Stop) and three action buttons: "Accept", "Cancel", and "Delete", along with a printer icon.

**Figure 2**

You can define any of the following:

- All three fields
- Only Customer Number + Commission Rate
- Only Item # + Commission Rate

You may enter the Commission Rate as either a flat rate or a percentage. The flat rate will only support a value between \$000.0000 and \$999.9999. If a flat rate is specified, then the commission will be calculated as the Quantity Shipped converted to the Std. Unit of Measure \* the Flat Rate.

The 'Effective Date' field is available only if you elected to use this option in Setup. The Effective Date field can be left blank, but you cannot maintain a blank date record and a dated record for the same criteria.

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The 'List Entries' button is available when a salesperson is specified. Click this button to view existing records in the file for this salesperson (Figure 3). The Effective Date column will exist whether you have elected to use this feature or not.

Customer No	Item Code	Effective Date	Commission Type	Commission
-	LUKETEST3		P	45
01-BRESLIN	1001-HON-H254	9/29/2006	P	15
01-DEANL			P	24

Figure 3

Select the Printer button on the maintenance screen to print a listing of the records in the file (Figure 4).

Salesperson Number	Customer Number	Item Number	Effective Date	Rate Type	Commission Rate
01-0100	01-ABF	1001-HON-H252		Percentage	5.000
01-0100	01-ABF	1001-HON-H252	08/01/04	Percentage	7.000
01-0100	01-ABF	1001-HON-H252	12/31/04	Percentage	10.000
01-0100	01-ABF	2480-8-50	08/01/04	Percentage	7.000

Figure 4

#### *Commission by Division Maintenance*

This option on the Sales Order Setup menu allows for the setup of sliding scale commission rates by division (Figure 5). Specify a Division. You will have access to five sliding scale

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commission tiers based on ranges of Discount Percentages, each with a corresponding Commission Percentage Rate. These percentages are a comparison of the Unit Price on the line to the standard price of the item in the inventory masterfile; they have nothing to do with line discounts.

Tier	Discount Off of List Price		Commission Rate
1	0.00	0.00	0.00
2	0.00	0.00	0.00
3	0.00	0.00	0.00
4	0.00	0.00	0.00
5	0.00	0.00	0.00

Figure 5

### Sales Journal Update

MAS 90 MAS 200 commission will be calculated as follows:

1. The program will look at the 'Commission Rate Table . . .' to see if this Customer/Item is set up for the Salesperson referenced on the Sales Order/Sales Order Invoice. If not, then
2. The program will look at the 'Commission Rate Table . . .' to see if only the Customer Number is set up for the Salesperson referenced on the Sales Order/Sales Order Invoice. If not, then
3. The program will look at 'Commission Rate Table . . .' to see if only the Item Number is set up for the Salesperson referenced on the Sales Order/ Sales Order Invoice. If so, then
  - It will look to see if the Customer belongs to a division that has been set up in 'Commission by Division Maintenance'.
  - If it has, then it will look to the tiers defined in 'Commission by Division Maintenance' and use the rate which corresponds to this line's Discount.
  - If not, then use the value set up in 'Commission Rate Table by Salesperson/Customer/Item'.
4. If none of the above occurs then the standard MAS 90 200 commissioning will take place.

If you elected to use an Effective Date and there are multiple records for the same criteria with only Effective Dates being the differentiator, then this Extended Solution will use the record with the date which is not greater than the Invoice date.

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### ODBC Dictionary

The files listed below have been added or changed in the ODBC Dictionaries by this Extended Solution for Crystal Reports purposes.

<i>File:</i>	<i>Fields:</i>
SO_CommRateBySpCustItem_001	All
SO_CommRateByDivision_001	All

Be aware that the ODBC Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

### What's New

*With the 08-30-06 release:*

- Converted to Business Framework.
- Added Export to Excel button to 'Commission Rate by Salesperson/Customer/Item' lookup.
- The column headings on the 'Commission Rate by Salesperson/Customer/Item' lookup have been changed:
  - from: Customer Number, Inventory Item Number, Effective Date, Percent or Flat Rate, and Commission Rates
  - to: Customer Number, Item Code, Effective Date, Commission Type, and Commission

### Upgrades and Compatibility

The installation CD is labeled with the version of the MAS 90 MAS 200 module for which this Extended Solution was prepared. This Extended Solution will check its compatibility with the appropriate MAS 90 MAS 200 modules and will be disabled if an incompatibility is found. If you upgrade your MAS 90 MAS 200 modules, this Extended Solution must be upgraded as well. Your MAS 90 MAS 200 dealer can supply this upgrade.

### Documentation

Only changes made to the standard operation of MAS 90 MAS 200 have been documented in this manual. Operations not documented in this manual are standard procedures of MAS 90 MAS 200 processing. Standard MAS 90 MAS 200 processes, data entry screens, inquiry screens, reports, updates, etc., have not been changed unless addressed in this document.

Parts of this document may refer to the *Specific Purpose Rule*. When referenced, the described feature was developed for a specific client to its specifications and may not conform to generally accepted MAS 90 MAS 200 standards and procedures. These features may or may not benefit you in your application of MAS 90 MAS 200.

### Acknowledgments

