
Sales Order Commissions by Line Item

SO-1055

Overview

This Extended Solution to the Sales Order module allows commission rates to be overridden in Sales Order and S/O Invoice entry on a line item basis.

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

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 and we will assist you during normal business hours.

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

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Custom Office

If you customize your MAS 90 MAS 200, then you must run the Update Utility every time you install this Extended Solution.

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).

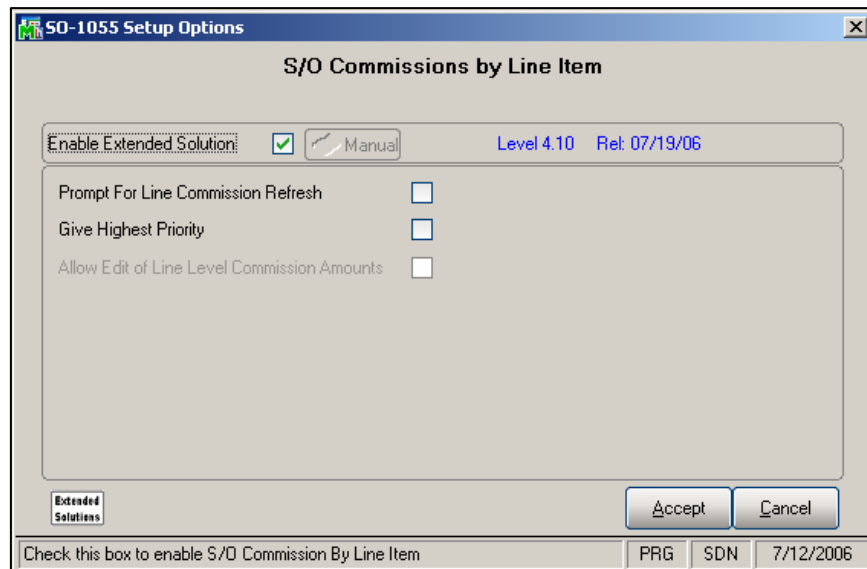


Figure 1

Answer the following prompts:

PROMPT FOR LINE COMMISSION REFRESH: Check this box to be prompted to refresh line commission rates whenever the standard commission rate on the totals screen is changed.

GIVE HIGHEST PRIORITY: Check this box to give line commission rates precedence over all other commission structures.



Note: This will affect all Sage Software Extended Solutions dealing with Commission Rates in Sales Order.

The following prompt is available if you have Extended Solution AR-1049: *Enhanced Salesperson Commission Report* installed and enabled:

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ALLOW EDIT OF LINE COMMISSION AMOUNTS: Check this box to Allow the Editing of Line Commission Amounts in History. See Operations for more information.

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

Operation

Order Entry/Invoice Entry

The Order Entry's and Invoice Entry's primary grid has been modified with two additional fields: 'Override Commission' and 'Commission %' (Figure 2). The Commission Rate will default to the value which MAS90 MAS200 thinks should be used (Item, Salesperson or Extended Solution specific rate). If the Override Commission flag is checked, you will have access to override the default Commission %.

The screenshot shows the 'Sales Order Entry (SDN) 8/22/2006' window. The 'Order Number' is ABC0153. The window is divided into four tabs: 1. Header, 2. Address, 3. Lines, and 4. Totals. The 'Lines' tab is active, showing a grid with the following data:

	Item Code	Comment	CM	Override Commission	Commission %
1	1001-HON-H252		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4.000
2	2480-8-50		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5.000
3	1001-HON-H254		<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.000
4			<input type="checkbox"/>	<input type="checkbox"/>	0.000

Below the grid, there are checkboxes for DC (checked), DS (unchecked), and SE (checked). The 'Cost' field is set to 82.5000. The 'Total Amount' is 6,336.00. At the bottom, there are buttons for 'Quick Print...', 'Recalc Price', 'Accept', 'Cancel', 'Delete', and a help icon.

Figure 2



The standard 'CM' checkbox, the SO-1055 'Override Commission' checkbox and the SO-1055 'Commission %' fields must all be in the same grid, either primary or secondary. You will need to move some of your fields in order for this Extended Solution to function.

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If the Setup question 'Prompt For Line Commission Refresh' is checked, then the line's commission rates may be refreshed from the standard Commission Rate field on the Totals tab of Order Entry and Invoice Entry. You will be prompted to refresh the line commission rates when you change that value (Figure 3).

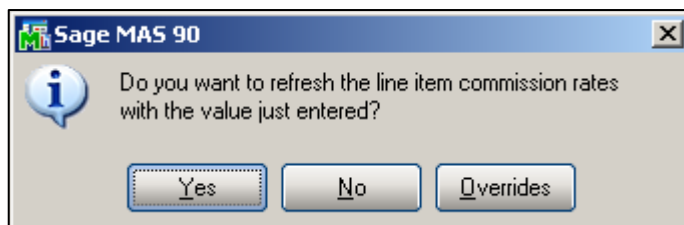


Figure 3


- If you answer 'Yes', the Override Rate for each line item subject to commission will be refreshed with the new value and the Override Commission Rate Flag will be checked.
- If you answer 'No', no changes will be made.
- If you answer 'Overrides', all line items with Override Commission Rate Flag checked will be refreshed with the new Commission Rate.

Shipping Data Entry


No changes have been made to Shipping Data Entry. This Extended Solution will create default commission records for any line that is added via the 'Alternate Items' option.

Sales Journal Update

During the S/O Journal Commission Calculation, the commission rate stored on the line will be used to calculate the commission for that particular line. The Sales Order Gross Profit Journal has been modified with an additional column: Commission Rate (Figure 4). It will print the line's Commission % from the Invoice.



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Sales Order Gross Profit Journal
Journal Posting Date: 01/17/2006
Register Number: SO-000110
Batch Number: 00046

Simply Delicious Natural Food Company (SDN)

Salesperson No: 01-0200 Shelby Westland

* = Price Change
* = Cost Change From RMA

Invoice Number	Invoice Date	Order Number	Net Sales Amount	COGS Amount	Gross Profit Amount	Profit Percent	Comm	Commission Amount	Invoice Total
0000140-IN	01/17/2005								
		1001-HON-H252	10.00	0.00	3.40	49.50	58.23%	Yes	45.55
SALES ACCT: 400-0100000000-000000000-000000									
COGS ACCT: 450-0100000000-000000000-000000									
		1001-HON-H272LK	5.05	421.95	183.05	239.90	56.82%	Yes	20.24
SALES ACCT: 400-0100000000-000000000-000000									
COGS ACCT: 450-0100000000-000000000-000000									
Sales Subject To Commission:			1,261.95	525.55	736.40	58.35%		65.79	
Net Invoice Total:			1,261.95	525.55	736.40	58.35%			1,270.78
Commission Rate:			0.00%						
0000141-IN	01/17/2005								
		6555	6.00	1,868.00	875.00	993.00	50.46%	Yes	118.00
SALES ACCT: 400-0100000000-000000000-000000									
COGS ACCT: 450-0100000000-000000000-000000									
Sales Subject To Commission:			1,980.00	975.00	993.00	50.46%		118.00	
Net Invoice Total:			1,980.00	975.00	993.00	50.46%			2,076.40
Sales Subject To Comm:			3,229.95	1,500.55	1,729.40	53.54%		183.87	
Net Invoice Total:			3,229.95	1,500.55	1,729.40	53.54%			3,347.18
Report Total:			3,229.95	1,500.55	1,729.40	53.54%		183.87	
Net Invoice Total:			3,229.95	1,500.55	1,729.40	53.54%			3,347.18

Figure 4

Commission Edit Maintenance

If you have AR-1049: *Enhanced Salesperson Commission Report* installed and enabled and you checked 'Allow Edit Of Line Commission Amounts' in Setup, A/R Commission Edit Maintenance will be modified as follows:

There will be a new 'Line' button on the Commission Edit Maintenance screen (Figure 5).

Commission Edit Maintenance

Salesperson Number: 00-0000 Company Sale

Customer Number: 00-000000 Customer

Invoice Number: 0000068-IN Line Has Been Previously Edited

Invoice Date: 10/09/2002 Sales Sub to Commission: 2.00

Pay Date: Cost Sub to Commission: 1.00

Apply-to Number: Commission Amount: 5.00

Invoice Total: 2.05 Commission Rate: .000% Recalc

Invoice Amount Paid: .00 Split Commission Percent: 100.00% Default

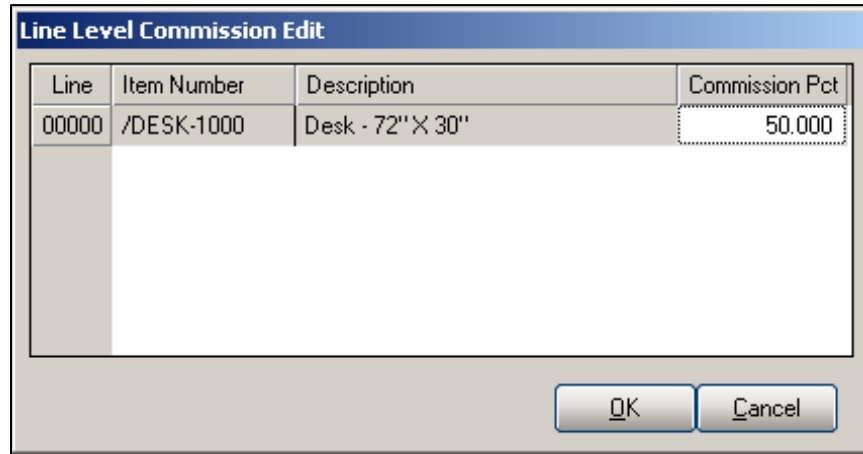
Line Accept Cancel Delete ?

MJF MJF 09/11/2003

Figure 5

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When you click this button, Line Level Commission Edit will pop up allowing you to query each commissionable line on the Invoice (Figure 6). You will be allowed to modify the percentage.



Line	Item Number	Description	Commission Pct
00000	/DESK-1000	Desk - 72" X 30"	50.000

Buttons:

Figure 6

As you exit Line Level Commission Edit, this Extended Solution will recalculate the Invoice's Commission Amount and will update A/R Invoice History.

Access to the 'Commission Amount' field will be prohibited and the 'Recalc' and 'Default' buttons will be disabled.

Helpful Hints

- During Sales Order Commission Calculation, if the Commission Method is set by Inventory Item and the Inventory Item Commission Method is set to 'None', then the Commission Amount for that Line Item will be zero. This is true even if you overrode the Commission on the line.

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>Description Fields:</i>
SO_SalesOrderDetail	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
SO_SalesOrderWrk	OverrideCommissionRate_001\$ LineCommissionRateOverride_001

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SO_InvoiceDetail	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
SO_InvoiceWrk	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
SO_SalesOrderHistoryDetail	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
SO_SalesOrderQuoteHistoryWrk	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
AR_InvoiceHistoryDetail	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
AR_InvoiceHistoryWrk	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
SO_GrossProfitJournalWrk	LineCommissionRate_001

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 07-17-06 release:

- Converted to Business Framework
- Removed the following three setup options:
 - Re-prompt For Override Commission
 - Display Default Commission Rate
 - Always Pop Up Commission Window
- Added new fields to Sales Order Detail, Invoice Detail, S/O Order/Quote History Detail and A/R Invoice History Detail files
- Fields ship in grid for sales order entry and invoice entry.
- Fields can be added to the Additional Information Tab for S/O Order/Quote History and A/R Invoice History, thru Customizer

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.

Extended Solutions



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

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