
Sliding Scale Commissions by Items

SO-1095

Overview

This Extended Solution allows commissions generated from Sales Order invoices to be calculated on a sliding scale based on either the gross profit percentage or the unit price of the individual Inventory line items. Additionally, you may calculate an Inventory item's commission by applying the commission rate arrived at by this Extended Solution to the line extension rather than using the Inventory item's standard commission method.



The 'Calculate Commissions By Inventory Item' box in Inventory Options Setup must be checked. This Extended Solution affects only the commission for Inventory lines.

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

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

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).

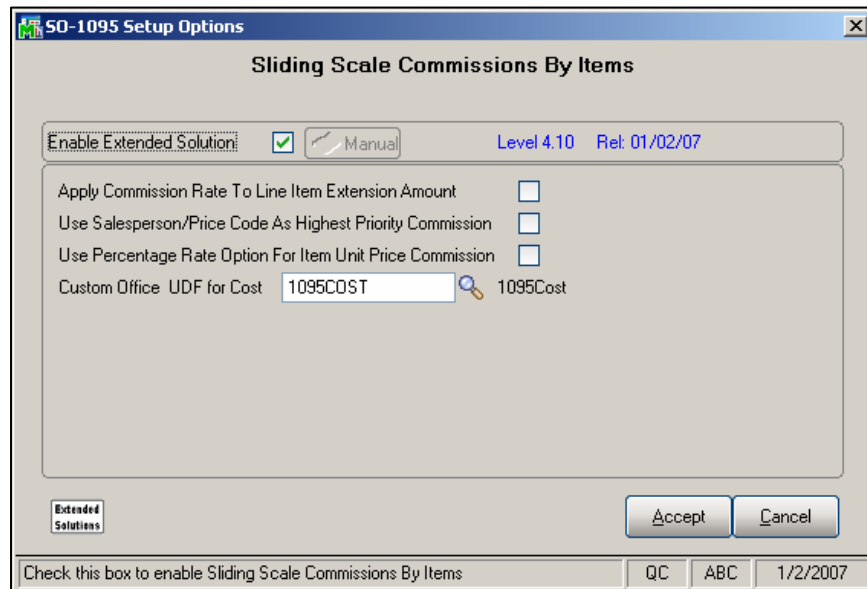


Figure 1

Answer the following prompts:

APPLY COMMISSION RATE TO LINE ITEM EXTENSION AMOUNT: Check this box to calculate the Commission Rate using the line's extension rather than the line's gross profit. The processing will be the same as if you had set the commission method to 'Std Price Percentage' for all Inventory items on the invoice.

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USE SALESPERSON/PRICE CODE AS HIGHEST PRIORITY COMMISSION: Checking this box will cause the Salesperson/Price Code to be used as the Highest Priority commission. This will change the Commission selection hierarchy to

1. Salesperson/Price Code
2. Item/Customer Specific Gross Profit Commission Table
3. Item Specific Gross Profit Commission Table
4. Salesperson (not Price Code specific)

If unchecked the Commission selection hierarchy is

1. Item/Customer Gross Profit Commission Table
2. Item/Customer Unit Price Commission Table
3. Item/Price Level Gross Profit Commission Table (blank customer)
4. Item/Price Level Unit Price Commission Table (blank Customer)
5. Item Gross Profit Commission Table (blank customer and blank price level)
6. Item Unit Price Commission Table (blank customer and blank price level)
7. Salesperson/Price Code
8. Salesperson (not Price Code specific)

USE PERCENTAGE RATE OPTION FOR ITEM UNIT PRICE COMMISSION: Check this box if you wish to use a percentage amount for the Item Unit Price option. When changing this option, the system checks for any existing records. If any are found, a prompt will appear asking you if you want to delete any existing records with the old format. If you answer 'NO,' the option will not be changed from its current setting. If you answer 'YES,' then the old records are deleted and the option flag is changed. If you are using the sliding scale by item option, all items must have either a flat rate or percentage rate commission. You will not be able to have some items that are percentage rate and some that are flat rate.

If you have the Custom Office module enabled you will have access to the following prompt:

CUSTOM OFFICE UDF FOR COST: If you wish to use a line UDF to hold the unit cost value used in the commission calculation, then specify one S/O Invoice Detail, numeric UDF.

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

Role Maintenance

The following Tasks have been added to Sales Order, Setup Options:

- Extended Solutions Setup

Please review your security setup in Role Maintenance and make appropriate changes.

Operation

A/R Salesperson Maintenance

A 'Comm...' button has been added to the A/R Salesperson Maintenance screen (Figure 2). Click this button to enter and maintain a sliding scale commission rate table for any number of tiers between 0% and 99999.999% Gross Profit.

The screenshot shows a software window titled "Salesperson Maintenance (ABC) 1/2/2007". At the top, there are navigation buttons (back, forward, search, etc.). Below that, the "Salesperson No." is "01-0100" and the "Name" is "Jim Kentley". There are two tabs: "1. Main" (selected) and "2. History". The main form contains several input fields: "Address" (42781 W. 34th Street), "ZIP Code", "City" (Racine), "State" (WI), "Country", "Telephone", "E-mail Address", and "Commission Rate" (10.000%). Below this is a section for "Sales Manager" and "Commission Rate" (.000%). At the bottom of the window, there are buttons for "Comm..." (with a dropdown arrow), "Accept", "Cancel", "Delete", and a help icon.

Figure 2

For each Salesperson/Price Code combination, a break level may be entered with a corresponding commission rate (Figure 3). The entry of a Price Code is not required. If no Price Code is entered, the table will be associated with the Salesperson only, not Salesperson/Price Code combination. An option to print a Sliding Scale Commission by Gross Profit Listing by Salesperson has been included.

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Sliding Scale Commissions By Percent Gross Profit

Salesperson 01-0100 Jim Kentley

Price Code

To Gross Profit % Commission Rate

From Gross Profit %	To Gross Profit %	Commission Rate
.000	5.000	1.000
5.001	10.000	2.000
10.001	15.000	3.000

Enter Price Code

Figure 3

An additional option allows the commission table of a Salesperson to be copied to a range of Salesperson codes (Figure 4).

Sliding Scale Copy

The sliding scale commission structure for this salesperson will be copied to the following range of Salesperson Codes.

	All	Starting	Ending
Salesperson Code	<input checked="" type="checkbox"/>	<input type="text"/>	99-ZZZ
Price Code	<input checked="" type="checkbox"/>	<input type="text"/>	ZZZ

Proceed Cancel

Figure 4

Negative Tier Records

Negative tier records are stored in the file as their inverse amount. This is done in order to maintain their correct sort position in the file. The inverse formula is $TIER = -9999.999 - TIER$.

See Figures 5 and 6 for an example for negative tier records in Sliding Scale Commission by Percent Gross Profit.

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From Gross Profit %	To Gross Profit %	Commission Rate
-20.001	AND LESS	5.000
-10.001	-20.000	2.000
-.001	-10.000	1.000
.000	1.000	.000
1.001	10.000	1.000
10.001	20.000	2.000
20.001	AND OVER	5.000

Figure 5

PRICE CODE	FROM % GROSS PROFIT	TO % GROSS PROFIT	COMMISSION RATE
	-20.001	AND LESS	5.000
	-10.001	-20.000	2.000
	-.001	-10.000	1.000
	.000	1.000	.000
	1.001	10.000	1.000
	10.001	20.000	2.000
	20.001	AND OVER	5.000

Figure 6

Inventory Maintenance

A 'More...' button has been added to the Main tab of Inventory Maintenance (Figure 7). Click this button to access the Commission Method Selection window (Figure 7a). (The Standard commission method for an item cannot be 'None' or 'Std Commission').

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Figure 7

Figure 7a

Select an option to enter and maintain a sliding scale commission rate table for any number of tiers, either by Item's Unit Price or by Item's Percent Gross Profit.

Item Gross Profit Percent Commission Method

For each Inventory item, a Customer Number or Price Level can be defined or left blank, and a Gross Profit percentage break level may be entered with a corresponding commission rate (Figure 8). Click on the lookup located next to the Item Description to list entries for this Item by Customer Number (Figure 8a). The Inventory Item Specific Table is not variable by Salesperson.

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Sliding Scale Commissions

Item Number: 1001-HON-H252 HON 2 DRAWER LETTER FLE W/D
 Customer Number: 01-ABF American Business Futures
 Price Level:
 To Gross Profit %: .000
 Commission Rate: .000

From Gross Profit %	To Gross Profit %	Commission Rate
.000	1.000	2.100
1.001	2.000	4.000
2.001	4.000	8.000

QC1 ABC 5/14/2008

Figure 8

A/R Sliding Scale Commissions

Item Number	Customer
1001-HON-H252LK	-
1001-HON-H252LK	01-ABB
1001-HON-H252LK	01-ABC
1001-HON-H252LK	01-ABF
1001-HON-H252LK	01-AVNET
1001-HON-H252LK	01-BRESLIN
1001-HON-H252LK	01-CASH
1001-HON-H252LK	01-HILLSB
1001-HON-H252LK	01-RSSUPPL
1001-HON-H252LK	01-SHEPARD
1001-HON-H252LK	02-ALLENAP
1001-HON-H252LK	02-AMERCON
1001-HON-H252LK	02-ATOZ
1001-HON-H252LK	02-AUTOOCR
1001-HON-H252LK	02-BAYPYRO
1001-HON-H252LK	02-CAPRI

Search: Customer Begins with Find

Filters... Custom... Select Cancel

Found 20 records SDN SDN 11/1/2005

Figure 8a

Item Unit Price Commission Method

Either a Customer Number or a Price Level can be defined when using the Item Unit Price Commission Method. In addition, a To Unit Price break level may be entered with a

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corresponding commission rate (Figures 9 and 9a). Click on the lookup button located next to the Item Description to list entries for this Item by Customer Number (Figure 8a).

If the Setup prompt 'Use Percentage Rate Option for Item Unit Price Commission' is unchecked, a break level may be entered with a corresponding flat commission amount (Figure 9). If checked, a break level may be entered with a corresponding commission percentage rate (Figure 10).

These tables do not vary by Salesperson.

From Unit Price	To Unit Price	Commission Amount
.000	1.000	1.11
1.001	2.000	2.22

Figure 9

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Sliding Scale Commissions

Item Number 1001-HON-H252 HON 2 DRAWER LETTER FLE W/D

Customer Number Undo

Price Level A Remove

To Unit Price 5.000

Commission Amount 2.50

From Unit Price	To Unit Price	Commission Amount
.000	5.000	2.50
5.001	6.000	3.00

Copy Print

LHD LHD 5/14/2008

Figure 9a

Sliding Scale Commissions

Item Number 1001-HON-H252 HON 2 DRAWER LETTER FLE W/D

Customer Number 01-ABF American Business Futures Undo

Price Level Remove

To Unit Price 1.000

Commission Rate 2.000

From Unit Price	To Unit Price	Commission Rate
.000	1.000	2.000
1.001	2.000	4.000
2.001	99.000	6.000

Copy Print

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Figure 10

You can copy records by clicking on the 'COPY' button. You will be prompted for a range of Inventory items and a range of Customer Numbers (Figure 11). Clicking 'PROCEED' will create or overwrite existing records for the Items and or Customers defined.



The copy button will be disabled whenever there is a Price Level on the screen.

Figure 11

An option to print a Sliding Scale Commission Listing has been included. Figure 12 is an example of what is produced when you use Commission by Gross Profit.

FROM % GROSS PROFIT	TO % GROSS PROFIT	COMMISSION RATE
CUSTOMER NO:		
000	1.000	1.000
1.001	2.000	2.000
CUSTOMER NO: 01-ABF		
2.001	1.000	2.100
1.001	2.000	4.000
2.001	4.000	8.000
CUSTOMER NO: 01-AVNET		
4.001	1.000	11.111
1.001	2.000	22.000
2.001	9999.999	50.000

Figure 12

Sales Journal Print & Update

The method by which commissions are calculated in the Sales Order Journal Pre-Update has been enhanced to use these commission tables. The Sales Order Gross Profit Journal and Salesperson Commission Report will reflect the accurate commission amount calculated, based on the item's gross profit percentage and corresponding commission rate. If negative

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tiers are specified, then negative commission amounts will result. When no commission rate tier is found for the Inventory Item or the Salesperson, normal MAS 90 MAS 200 commission calculation will take over.

If you entered a UDF in Setup for 'Custom Office UDF for Cost,' SO-1095 will use the value in this field as the Inventory Item's Unit Cost for Commission Calculations. Zero will be considered a valid value. All other Sales Journal updates which reference 'cost' will be unaffected.

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>Field:</i>
AR_SlidingScaleCommissions_001	All Fields

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 05-16-08 release:

- Added the ability to setup Sliding Scale Commission records by Price Level rather than Customer Number

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 by Sage Software, Inc. to the standard operation of Sage Software, Inc. 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.

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Acknowledgments

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