



# **Commission Plan Integration Guide**

*For Microsoft Dynamics GP 2016*

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## COM Integration

Dynamics GP functions as an automation server, which allows other applications to use COM to access Dynamics GP data and resources. Commission Plan includes a COM callback object which can be used to create, update, or delete and recreate commissions for existing Sales Order Processing (SOP) documents.

### Object

ETI\_CP.CreateUpdateSOPDocCommissions

### Properties

ETI\_CP.CreateUpdateSOPDocCommissions has 2 properties:

- SOPNum
  - Data Type = String
  - Value = SOP Document Number
- SOPType
  - Data Type = Integer
  - Value = SOP Document Type (requires the actual sop type, not the value from the SOP Type drop-down list)

### Methods

ETI\_CP.CreateUpdateSOPDocCommissions has 1 method:

- UpdateCommissions
  - Function returns integer error code
  - Parameters
    - UpdateHow
      - Data Type = Integer
      - Values
        - 1 = update existing commissions
        - 2 = delete and recalculate commissions
        - 3 = create commissions if none exist
        - 4 = update existing commissions or create commissions if none exist
        - 5 = delete existing unprocessed commissions
    - PreventCommCreation
      - Data Type = Boolean - always set to False if UpdateHow <> 5
      - Values
        - True = prevent future commissions from being created for SOP document
        - False = allow future commissions to be created for SOP document
    - UpdateHolds
      - Data Type = Integer
      - Values
        - 0 = default action
        - 1 = never update

- 2 = update only for new commissions
  - 3 = update only for existing commissions
  - 4 = update all
- OverrideIgnoredDocIDs
  - Data Type = Boolean
  - Values
    - True = create commissions even though the Sales Type ID is set to not create commissions
    - False = use Sales Type ID defaults
- ResetSalespersonInactiveFlags
  - Data Type = Boolean
  - Values
    - True = delete existing salesperson inactive records for SOP document and re-evaluate inactive salespeople
    - False = use existing inactive salespeople assignments for SOP document
- ResetPriceSheets
  - Data Type = Boolean
  - Values
    - True = delete manually edited price sheet assignments for SOP document and re-evaluate price sheet assignments
    - False = use existing manually edited price sheet assignments for SOP document
- ResetListPriceHow
  - Data Type = Integer
  - Values
    - 0 = do nothing
    - 1 = delete and re-evaluate list prices that have not been manually edited for SOP document
    - 2 = delete and re-evaluate list prices that have been manually edited for SOP document
    - 3 = delete and re-evaluate all list prices for SOP document
- ResetStandardCost
  - Data Type = Integer
  - Values
    - 0 = do nothing
    - 1 = delete and re-evaluate standard costs that have not been manually edited for SOP document
    - 2 = delete and re-evaluate standard costs that have been manually edited for SOP document
    - 3 = delete and re-evaluate all standard costs for SOP document
- ResetCommSaleOverride
  - Data Type = Boolean
  - Values
    - True = delete manually edited commissionable sale unit amounts for SOP document and re-evaluate commissionable sale unit amounts

- False = use existing manually edited commissionable sale unit amounts for SOP document
- ResetCommCostOverride
  - Data Type = Boolean
  - Values
    - True = delete manually edited commissionable cost unit amounts for SOP document and re-evaluate commissionable cost unit amounts
    - False = use existing manually edited commissionable cost unit amounts for SOP document
- ResetDocDate
  - Data Type = Boolean
  - Values
    - True = delete manually edited document date values for SOP document and re-evaluate price sheet assignments
    - False = use existing manually edited document date values for SOP document
- ResetGLPostingDate
  - Data Type = Boolean
  - Values
    - True = delete manually edited GL posting date values for SOP document and re-evaluate price sheet assignments
    - False = use existing manually edited GL posting date values for SOP document
- ResetDateDocPaid
  - Data Type = Boolean
  - Values
    - True = delete manually edited date doc paid values for SOP document and re-evaluate price sheet assignments
    - False = use existing manually edited date doc paid values for SOP document
- Error Codes
  - 0 = no error
  - 1 = Commission Plan not registered
  - 2 = object properties not set
  - 3 = invalid UpdateHow parameter value
  - 4 = invalid UpdateHolds parameter value
  - 5 = Dynamics GP is running File Maintenance
  - 6 = invalid SOP Type for posted SOP document (may only be Invoice or Return)
  - 7 = SOP document doesn't exist
  - 8 = SOP document has been voided
  - 9 = Receivables document has been deleted for posted SOP document
  - 10 = all commissions have been processed for SOP document

## Example

Use ETI\_CP.CreateUpdateSOPDocCommissions to create/update commissions for SOP order number ORDST1001.

### Visual Basic

```
Dim commissionObject As Object
Dim errorCode As Integer

'Retrieve a reference to the callback
Set commissionObject = GetObject("ETI_CP.CreateUpdateSOPDocCommissions")

'Set the properties and create/update commissions
commissionObject.SOPNum = "ORDST1001"
commissionObject.SOPType = 2
errorCode = commissionObject.UpdateCommissions(4, false, 0, false, false, false, false);
```

### Dexterity

```
local reference commissionObject;
local integer errorCode;

{Retrieve a reference to the callback}
commissionObject = COM_GetObject("ETI_CP.CreateUpdateSOPDocCommissions");

if commissionObject = null then
    warning "Couldn't get reference to ETI_CP.CreateUpdateSOPDocCommissions";
    errorCode = -1;
else
    {Set the properties and create/update commissions}
    commissionObject.SOPNum = "ORDST1001";
    commissionObject.SOPType = 2;
    errorCode = commissionObject.UpdateCommissions(4, false, 0, false, false, false, false);
end if;
```

# Override Normally Calculated Commissions

## Integration Tables

This feature requires Commission Plan – Apex. See the EthoSeries User Guide for Commission Plan product details.

Commission Plan utilizes two tables to override the normally calculated commissions for a particular Dynamics GP sales document, when the salespeople to be commissioned are known at the time of sales document integration (meaning that you won't rely on Commission Plan to determine the salespeople to be commissioned on the document).

Create a record in table ETI\_SOP\_HDR\_Integration (ETI28305) for each salesperson who should receive commission on the sales document or for whom you wish to override commissions. Create a record in table ETI\_SOP\_LINE\_Integration (ETI28316) for each salesperson's commission line which should be created or overridden.

### ETI\_SOP\_HDR\_Integration (ETI28305)

Dexterity Field Name	SQL Field Name	Comments
SOP Number	SOPNUMBE	Dynamics GP sales document number
SOP Type	SOPTYPE	Dynamics GP sales document type
Salesperson ID	SLPRSNID	Dynamics GP salesperson
ETI_Apply_To_All_SOP_Lines	ETI_ApplyToAllSOPLines	Set to 1 to commission the salesperson for all line items on the sales document; otherwise set to 0, in which case an entry must be made in table ETI_SOP_LINE_Integration for each sales document line item
ETI_CP_OverrideSalesPlan	ETI_CP_OverrideSalesPlan	Set to 1 to override the Salesperson Plan determined by Commission Plan; otherwise set to 0
ASI Salesperson Commission ID	ASISLCMID	Enter a value only if ETI_CP_OverrideSalesPlan is set to 1 – this value must be an existing salesperson plan, and no validation will be performed; otherwise set to ""
ETI_CP_OverrideCustPlan	ETI_CP_OverrideCustPlan	Set to 1 to override the Customer Plan determined by Commission Plan; otherwise set to 0
ASI Customer Commission ID	ASICUCMID	Enter a value only if ETI_CP_OverrideCustPlan is set to 1 – this value must be an existing customer plan, and no validation will be performed; otherwise set to ""
ASI_Split_Commission_Rate	ASI_Split_Commission_Rat	Reduction / increase percentage of the normally calculated commission: 10000 = 100%, 5000 = 50%. A value of 0 will result in a zero dollar commission. A value of 10000 should be used if you are entering splits for each commission line in table ETI_SOP_LINE_Integration (ETI28316).
ETI_CP_RolldownHdrSplit	ETI_CP_RolldownHdrSplit	Set to 1 if you wish the ETI_SOP_HDR_Integration (ETI28305) commission split rate to be taken for each commission line rather than for the commission header; otherwise set to 0. If you set to 1, the commission split of each commission line will be set to the ETI_SOP_HDR_Integration (ETI28305) ASI_Split_Commission_Rat value, regardless of the



		value you may set for any given commission line in table ETI_SOP_LINE_Integration (ETI28316).
--	--	---

## ETI\_SOP\_LINE\_Integration (ETI28316)

Dexterity Field Name	SQL Field Name	Comments
SOP Number	SOPNUMBE	Dynamics GP sales document number
SOP Type	SOPTYPE	Dynamics GP sales document type
Salesperson ID	SLPRSNID	Dynamics GP salesperson
Line Item Sequence	LNITMSEQ	Dynamics GP sales document line item sequence number
ETI_CP_CreateCommLine	ETI_CP_CreateCommLine	Set to 1 for a commission amount to be calculated; set to 0 for a zero dollar commission to be calculated
ASI_Split_Commission_Rate	ASI_Split_Commission_Rat	Reduction / increase percentage of the normally calculated commission: 10000 = 100%, 5000 = 50%. A value of 0 will result in a zero dollar commission
ETI_CP_OverrideCommSaleAmt	ETI_CP_OverrideCommSale	Set to 1 to override the Commissionable Sale Amount determined by Commission Plan; otherwise set to 0
ASI Commissionable Sale Amount	ASICSLAMT	Enter a value only if ETI_CP_OverrideCommSaleAmt is set to 1 - the value in this field is the commissionable sale amount per selling unit, not the extended commissionable sale amount; otherwise set to 0
ETI_CP_OverrideCommCostAmt	ETI_CP_OverrideCommCost	Set to 1 to override the Commissionable Cost Amount determined by Commission Plan; otherwise set to 0
ASI Commissionable Cost Amount	ASICCTAMT	Enter a value only if ETI_CP_OverrideCommCostAmt is set to 1 - the value in this field is the commissionable cost amount per selling unit, not the extended commissionable cost amount; otherwise set to 0
ETI_CP_OverrideCommRate	ETI_CP_OverrideCommRate	Set to 1 to override the Commission Type and rate determined by Commission Plan; otherwise set to 0
ASI Commission Type	ASICOMTYP	Enter a value only if ETI_CP_OverrideCommRate is set to 1 (otherwise set to 0): 1 = no commission 2 = margin 3 = sale 4 = flat amount 5 = per selling unit of measure 6 = per base unit of measure
ASI_Commission_Rate_Percent	ASICommPlanRatePct	Enter a value only if ETI_CP_OverrideCommRate is set to 1 and ASI Commission Type is set to 2 or 3; otherwise set to 0
ASI_Commission_Rate_Amount	ASICommRateAmt	Enter a value only if ETI_CP_OverrideCommRate is set to 1 and ASI Commission Type is set to 4, 5, or 6; otherwise set to 0
ETI_CP_OverrideSalesPlan	ETI_CP_OverrideSalesPlan	Set to 1 to override the Salesperson Plan determined by Commission Plan; otherwise set to 0
ASI Salesperson Commission ID	ASISLCMID	Enter a value only if ETI_CP_OverrideSalesPlan is set to 1 – this value must be an existing salesperson plan, and no validation will be performed; otherwise set to ""
ETI_CP_OverrideItemPlan	ETI_CP_OverrideItemPlan	Set to 1 to override the Item Plan determined by

		Commission Plan; otherwise set to 0
ASI Item Commission ID	ASIITCMID	Enter a value only if ETI_CP_OverrideItemPlan is set to 1 – this value must be an existing item plan, and no validation will be performed; otherwise set to ""

## eConnect Nodes

The Commission Plan eConnect XML Node Reference PDF document contains instructions for utilizing the Commission Plan eConnect nodes to insert, update, and delete rows in the integration tables.

## SOP Document Overrides

Commission Plan utilizes a table to override the sales document line commission information for all salespeople who will be commissioned on the document<sup>1</sup>. This allows Commission Plan to determine the salespeople to be commissioned on the document, rather than using the above integration tables.

Create a record in table ETI\_SOP\_LINE\_Info (ETI28913) for each sales document line for which you wish to override commission information for all salespeople<sup>2</sup>.

## ETI\_SOP\_LINE\_Info (ETI28913)

Dexterity Field Name	SQL Field Name	Comments
SOP Number	SOPNUMBE	Dynamics GP sales document number
SOP Type	SOPTYPE	Dynamics GP sales document type
Line Item Sequence	LNITMSEQ	Dynamics GP sales document line sequence number
Item Number	ITEMNMBR	Dynamics GP sales document line item number
ETI_CP_OverridePriceSheetID	ETI_CP_OverridPriceSheet	Only used when Commission Plan Price Sheet Tiers are activated; Set to 1 to override the Price Sheet determined by Commission Plan; otherwise set to 0
PriceSheetID	PRCSHID	Enter a value only if ETI_CP_OverridPriceSheet = 1; otherwise set to ""
ETI_CP_OverrideListPrice	ETI_CP_OverrideListPrice	Set to 1 to override the List Price determined by Commission Plan; otherwise set to 0
List Price	LISTPRCE	Enter a value only if ETI_CP_OverrideListPrice = 1; otherwise set to ""
ETI_CP_OverrideStandardCost	ETI_CP_OverrideStndCost	Set to 1 to override the Standard Cost determined by Commission Plan; otherwise set to 0
Standard Cost	STNDCOST	Enter a value only if ETI_CP_OverrideStndCost = 1; otherwise set to ""
ETI_CP_OverrideCommSaleAmt	ETI_CP_OverrideCommSale	Set to 1 to override the Commissionable Sale Amount determined by Commission Plan; otherwise set to 0
ASI Commissionable Sale Amount	ASICSLAMT	Enter a value only if ETI_CP_OverrideCommSaleAmt is set to 1 - the value in this field is the commissionable sale amount per selling

		unit, not the extended commissionable sale amount; otherwise set to 0
ETI_CP_OverrideCommCostAmt	ETI_CP_OverrideCommCost	Set to 1 to override the Commissionable Cost Amount determined by Commission Plan; otherwise set to 0
ASI Commissionable Cost Amount	ASICCTAMT	Enter a value only if ETI_CP_OverrideCommCostAmt is set to 1 - the value in this field is the commissionable cost amount per selling unit, not the extended commissionable cost amount; otherwise set to 0

<sup>1</sup> The data in table ETI28913 may be manually edited within the Dynamics GP user interface via the Commission Plan Sales Document Info window. This means that data you programmatically insert into the table can be overridden by Commission Plan users.

<sup>2</sup> Data in table ETI28913 will be used when creating or updating unprocessed commission lines for the sales document, except in the following scenarios:

- Commissionable amounts that have been manually edited in the Commission Plan Detail Entry window.
- Salespeople commissioned because they appear in the integration header table (ETI28305) with overridden commissionable amounts in the integration line table (ETI28316).

## Import Commission Adjustments

This feature requires Commission Plan – Apex. See the EthoSeries User Guide for Commission Plan product details.

Commission adjustments may be imported into multiple Dynamics GP companies at one time, based on entries made in the Commission Plan Adjustment Import tables.

Commission Plan utilizes three tables to import records into the Adjustments module of Commission Plan. All three tables exist in the DYNAMICS database.

Create a record in table ETI\_CP\_AdjDocImport (ETI28921) for the adjustment document. Create a record in table ETI\_CP\_AdjHdrImport (ETI28922) for each salesperson who will receive an adjustment record for the adjustment document. If the Adjustment Method for the adjustment document is set to Detail, create a record in table ETI\_CP\_AdjLineImport (ETI28923) for each salesperson’s commission line(s) for the adjustment document.

### ETI\_CP\_AdjDocImport (ETI28921)

Dexterity Field Name	SQL Field Name	Comments
Intercompany ID	INTERID	Company database name in which to create the adjustments
Sequence Number	SEQNUMBR	A unique long integer identifying this adjustment document
ETI_CP_AdjImportRunID	ETI_CP_AdjImportRunID	Set to empty string “ – will be populated by import routine
ETI_CP_AdjustmentNumber	ETI_CP_AdjustmentNumber	Set to empty string “ – will be populated by import routine
ETI_CP_AdjustmentMethod	ETI_CP_AdjustmentMethod	1 = summary, 2 = detail
ETI_CP_AdjustmentType	ETI_CP_AdjustmentType	Set to 0 if not using adjustment types; otherwise value must exist in table ETI_CP_AdjustmentTypeMSTR (ETI28926) in the company database
Document Date	DOCDATE	Document date of all adjustment records for the adjustment document
ETI_CP_LinkToSopDoc	ETI_CP_LinkToSopDoc	0 = adjustment not linked to posted invoice or return, 1 = adjustment linked to posted invoice or return
SOP Number	SOPNUMBE	Enter a value only if ETI_CP_LinkToSopDoc = 1: this value must be an existing posted sales invoice or return document number; otherwise set to “”
SOP Type	SOPTYPE	Enter a value only if ETI_CP_LinkToSopDoc = 1: this value must be either 3 (invoice) or 4 (return); otherwise set to 0
ETI_ImportStatus	ETI_ImportStatus	Set to 0 – will be populated by import routine
	DEX_ROW_ID	Identity column – do not insert a value
Error More Info Text	ERMINTX	Set to empty string “ – will be populated by import routine

## ETI\_CP\_AdjHdrImport (ETI28922)

Dexterity Field Name	SQL Field Name	Comments
Intercompany ID	INTERID	Same as INTERID field in table ETI28921
Sequence Number	SEQNUMBR	Same as SEQNUMBR field in table ETI28921
ETI_CP_AdjustmentNumber	ETI_CP_AdjustmentNumber	Set to empty string " " – will be populated by import routine
Salesperson ID	SLPRSNID	Existing Dynamics GP salesperson
ETI_CP_AdjImportRunID	ETI_CP_AdjImportRunID	Set to empty string " " – will be populated by import routine
ETI_CP_OverrideSalesPlan	ETI_CP_OverrideSalesPlan	Set to 1 to override the Salesperson Plan determined by Commission Plan; otherwise set to 0
ASI Salesperson Commission ID	ASISLCMID	Enter a value only if ETI_CP_OverrideSalesPlan = 1: this value must be an existing salesperson plan; otherwise set to ""
ETI_CP_OverrideCustPlan	ETI_CP_OverrideCustPlan	Set to 1 to override the Customer Plan determined by Commission Plan; otherwise set to 0
ASI Customer Commission ID	ASICUCMID	Enter a value only if ETI_CP_OverrideCustPlan = 1: this value must be an existing customer plan; otherwise set to ""
ASI Item Commission ID	ASIITCMID	Enter a value only if ETI_CP_AdjustmentMethod = 1 in table ETI28921: this value must be an existing item plan; otherwise set to ""
ASI_Salesperson_Net_Comm_Amt	ASISLSNETCOMMAMT	Enter a value only if ETI_CP_AdjustmentMethod = 1 in table ETI28921: this value must be an existing item plan; otherwise set to 0
ETI_CP_OverrideHoldStatus	ETI_CP_OverridHoldStatus	Set to 1 to override the Hold determined by Commission Plan; otherwise set to 0
ETI_Hold_Commissions	ETI_Hold_Commissions	Enter a value only if ETI_CP_OverridHoldStatus = 1: 0 = Not On Hold, 1 = On Hold ; otherwise set to 0
ETI_CP_OverrideDescription	ETI_CP_OverrideDesc	Set to 1 to override the Adjustment Description determined by Commission Plan; otherwise set to 0
ETI_Description	ETI_Description	Enter a value only if ETI_CP_OverrideDesc = 1: this value may be up to 50 characters; otherwise set to ""
ETI_ImportStatus	ETI_ImportStatus	Set to 0 – will be populated by import routine
	DEX_ROW_ID	Identity column – do not insert a value
Error More Info Text	ERRMINTX	Set to empty string " " – will be populated by import routine

## ETI\_CP\_AdjLineImport (ETI28923)

Dexterity Field Name	SQL Field Name	Comments
Intercompany ID	INTERID	Same as INTERID field in table ETI28921
Sequence Number	SEQNUMBR	Same as SEQNUMBR field in table ETI28921
ETI_CP_AdjustmentNumber	ETI_CP_AdjustmentNumber	Set to empty string " – will be populated by import routine
Salesperson ID	SLPRSNID	Same as SLPRSNID field in table ETI28922
Line Item Sequence	LNITMSEQ	A unique long integer identifying this adjustment record line, typically multiples of 16384
ETI_CP_AdjImportRunID	ETI_CP_AdjImportRunID	Set to empty string " – will be populated by import routine
Item Number	ITEMNMBR	Either an existing Dynamics GP item number or a non-inventoried item number
U Of M	UOFM	Valid unit of measure for the item
QTY	QUANTITY	Valid quantity for the item and U of M
ETI_CP_OverrideDescription	ETI_CP_OverrideDesc	Set to 1 to override the Adjustment Description determined by Commission Plan; otherwise set to 0
Item Description	ITEMDESC	Enter a value only if ETI_CP_OverrideDesc = 1: this value may be up to 100 characters; otherwise set to ""
ETI_CP_OverrideItemPlan	ETI_CP_OverrideItemPlan	Set to 1 to override the Item Plan determined by Commission Plan; otherwise set to 0
ASI Item Commission ID	ASIITCMID	Enter a value only if ETI_CP_OverrideItemPlan = 1: this value must be an existing item plan; otherwise set to ""
ETI_CP_OverrideSalesPlan	ETI_CP_OverrideSalesPlan	Set to 1 to override the Salesperson Plan determined by Commission Plan; otherwise set to 0 to use the import header salesperson plan
ASI Salesperson Commission ID	ASISLCMID	Enter a value only if ETI_CP_OverrideSalesPlan = 1: this value must be an existing salesperson plan; otherwise set to ""
ASI Commissionable Sale Amount	ASICSLAMT	Enter the commissionable sale amount
ASI Commissionable Cost Amount	ASICCTAMT	Enter the commissionable cost amount
ETI_CP_OverrideCommRate	ETI_CP_OverrideCommRate	Set to 1 to override the Commission Type and rate determined by Commission Plan; otherwise set to 0
ASI Commission Type	ASICOMTYP	Enter a value only if ETI_CP_OverrideCommRate is set to 1 (otherwise set to 0): 1 = no commission 2 = margin 3 = sale 4 = flat amount 5 = per selling unit of measure 6 = per base unit of measure
ASI_Commission_Rate_Percent	ASISCommPlanRatePct	Enter a value only if ETI_CP_OverrideCommRate is set to 1 and ASI Commission Type is set to 2 or 3; otherwise set to 0
ASI_Commission_Rate_Amount	ASISCommRateAmt	Enter a value only if ETI_CP_OverrideCommRate is set to 1 and ASI Commission Type is set to 4, 5, or 6; otherwise set to 0
ETI_ImportStatus	ETI_ImportStatus	Set to 0 – will be populated by import routine
	DEX_ROW_ID	Identity column – do not insert a value
Error More Info Text	ERMINTX	Set to empty string " – will be populated by import routine

## Notes

For Detail adjustments when Quotas are enabled, the ASICOMTYP, ASICommPlanRatePct, & ASICommRateAmt should all be set to 0, as no line item commission amount will be calculated.

If the adjustment document import is linked to an existing sales document, the Customer Plan for each salesperson's adjustment record will be set to the Customer Plan assigned to the customer in the Customer Commission Plan Info window (unless it is overridden); otherwise the Customer Plan for each salesperson's adjustment record will be empty.

The Salesperson Plan for each salesperson's adjustment record will be set to the Salesperson Plan assigned to the salesperson in the Salesperson Commission Plan Info window unless it is overridden.

For Summary adjustments, do not create a record in table ETI\_CP\_AdjLineImport (ETI28923).

For Detail adjustments, the Item Plan for a salesperson's adjustment line item record will be determined in the following manner:

1. If the Item Plan is overridden, the Item Plan from table ETI28923 will be used.
2. If the item is an existing Dynamics GP item, the Item Plan assigned to the item in the Item Commission Plan Info window will be used.
3. If the item is a non-inventoried item, the Default Item Plan For Non-inventoried items assigned in the Commission Plan Setup window will be used.

## Examples

Example 1 - Create a summary adjustment import document for Fabrikam linked to posted invoice INV2223, with 1 salesperson adjustment record:

ERIN J. , with Salesperson Plan = MANAGER, Customer Plan = DEFAULT, Item Plan = HARDWARE, Commission Amount = -50.00, adjustment not on hold even if ERIN J. is setup to have all commissions placed on hold, and Description = "Overpaid last month"

Insert the following 2 records:

-- Adjustment Document

```
INSERT INTO ETI28921 (INTERID, SEQNUMBR, ETI_CP_AdjImportRunID, ETI_CP_AdjustmentNumber,
ETI_CP_AdjustmentMethod, ETI_CP_AdjustmentType, DOCDATE, ETI_CP_LinkToSopDoc, SOPNUMBE,
SOPTYPE, ETI_ImportStatus, ERMINTX)
VALUES ('TWO', 1, '', 1, 0, '2015-02-01', 1, 'INV2223', 3, 0, '')
```

-- Adjustment Header for ERIN J.

```
INSERT INTO ETI28922 (INTERID, SEQNUMBR, ETI_CP_AdjustmentNumber, SLPRSNID,
ETI_CP_AdjImportRunID, ETI_CP_OverrideSalesPlan, ASISLCMID, ETI_CP_OverrideCustPlan, ASICUCMID,
ASIITCMID, ASISLSNETCOMMAMT, ETI_CP_OverridHoldStatus, ETI_Hold_Commissions,
ETI_CP_OverrideDesc, ETI_Description, ETI_ImportStatus, ERMINTX)
VALUES ('TWO', 1, '', 'ERIN J.', '', 1, 'MANAGER', 1, 'DEFAULT', 'HARDWARE', -50.00, 1, 0, 1, 'Overpaid last
month', 0, '')
```

Example 2 - Create a detail adjustment import document for Fabrikam, with 2 salesperson adjustment records, each with 1 detail adjustment:

PAUL W. , with Salesperson Plan = SALES REP on both adjustment header and line, Customer Plan = DEFAULT, item number = 100XLG, U of M = Each, Quantity = 1, Item Plan assigned based on item number, Item Description based on item number, Commissionable Sale Amount = -1000.00, Commissionable Cost Amount = -800.00, commission type and rate based on plan combination, adjustment on hold, adjustment header Description = "Commission goes to GREG E."

GREG E. , with Salesperson Plan on both adjustment header and line based on salesperson assignment, Customer Plan = DEFAULT, item number = 100XLG, U of M = Each, Quantity = 1, Item Plan assigned based on item number, Item Description based on item number, Commissionable Sale Amount = 1000.00, Commissionable Cost Amount = 800.00, commission type and rate based on plan combination, adjustment hold based on salesperson hold status, adjustment header Description = "Commission from PAUL W."

Insert the following 5 records:

-- Adjustment Document

```
INSERT INTO ETI28921 (INTERID, SEQNUMBR, ETI_CP_AdjImportRunID, ETI_CP_AdjustmentNumber,
ETI_CP_AdjustmentMethod, ETI_CP_AdjustmentType, DOCDATE, ETI_CP_LinkToSopDoc, SOPNUMBE,
SOPTYPE, ETI_ImportStatus, ERMINTX)
VALUES ('TWO', 2, "", "2, 0, '2015-01-15', 0, "", 0, 0, "")
```

-- Adjustment Header for PAUL W.

```
INSERT INTO ETI28922 (INTERID, SEQNUMBR, ETI_CP_AdjustmentNumber, SLPRSNID,
ETI_CP_AdjImportRunID, ETI_CP_OverrideSalesPlan, ASISLCMID, ETI_CP_OverrideCustPlan, ASICUCMID,
ASIITCMID, ASISLSNETCOMMAMT, ETI_CP_OverridHoldStatus, ETI_Hold_Commissions,
ETI_CP_OverrideDesc, ETI_Description, ETI_ImportStatus, ERMINTX)
VALUES ('TWO', 2, "", 'PAUL W.', "", 1, 'SALES REP', 1, 'DEFAULT', "", 0, 1, 1, 1, 'Commission goes to GREG
E.', 0, "")
```

-- Adjustment Line for PAUL W.

```
INSERT INTO ETI28923 (INTERID, SEQNUMBR, ETI_CP_AdjustmentNumber, SLPRSNID, LNITMSEQ,
ETI_CP_AdjImportRunID, ITEMNMBR, UOFM, QUANTITY, ETI_CP_OverrideDesc, ITEMDESC,
ETI_CP_OverridItemPlan, ASIITCMID, ETI_CP_OverrideSalesPlan, ASISLCMID, ASICSLAMT, ASICCTAMT,
ETI_CP_OverrideCommRate, ASICOMTYP, ASICommPlanRatePct, ASICommRateAmt, ETI_ImportStatus,
ERMINTX)
VALUES ('TWO', 2, "", 'PAUL W.', "", 16384, '100XLG', 'Each', 1, 0, "", 0, "", 1, 'SALES REP', -1000.00, -800.00,
0, 0, 0, 0, 0, 0, "")
```

-- Adjustment Header for GREG E.

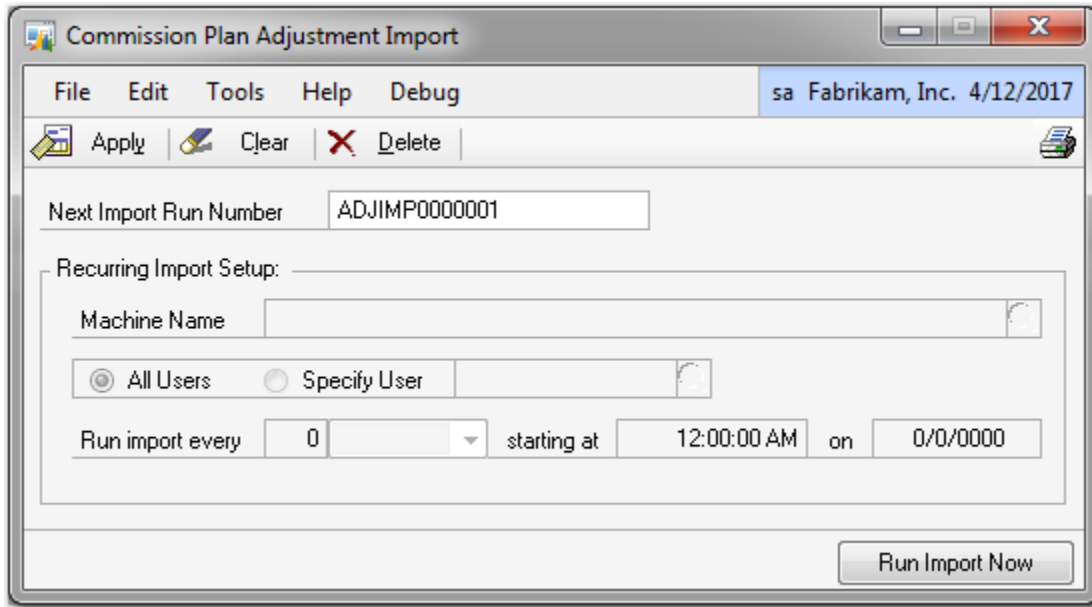
```
INSERT INTO ETI28922 (INTERID, SEQNUMBR, ETI_CP_AdjustmentNumber, SLPRSNID,
ETI_CP_AdjImportRunID, ETI_CP_OverrideSalesPlan, ASISLCMID, ETI_CP_OverrideCustPlan, ASICUCMID,
ASIITCMID, ASISLSNETCOMMAMT, ETI_CP_OverridHoldStatus, ETI_Hold_Commissions,
ETI_CP_OverrideDesc, ETI_Description, ETI_ImportStatus, ERMINTX)
VALUES ('TWO', 2, "", 'GREG E.', "", 0, "", 1, 'DEFAULT', "", 0, 0, 0, 1, 'Commission from PAUL W.', 0, "")
```





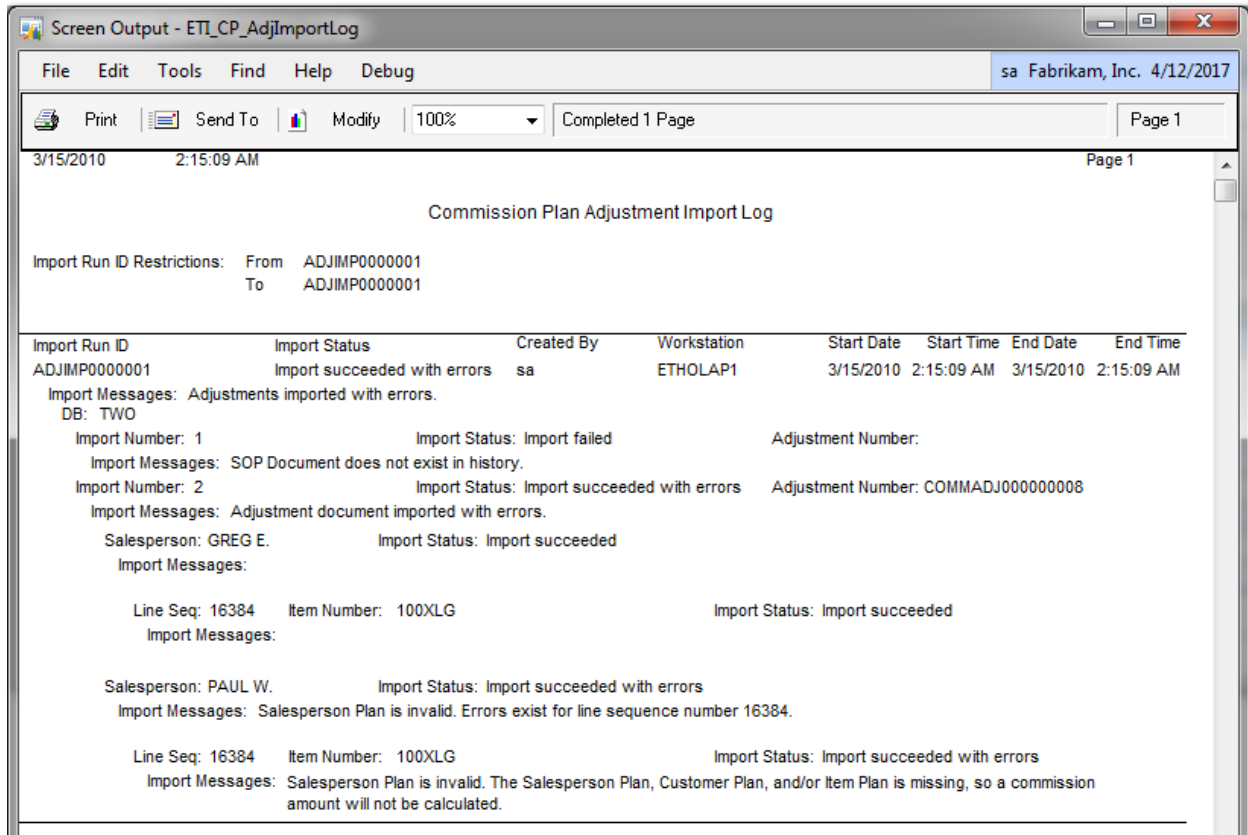
## Creating Adjustment Records

Once you've created the appropriate entries in the import tables, open the Commission Plan Adjustment Import window (*Tools >> Integrate >> Commission Plan >> Commission Plan Adjustment Import*).



If the Next Import Run Number is blank, enter a value. This number will be entered in the ETI\_CP\_AdjImportRunID field in the import tables for adjustments imported during this run. Click the Print button to view the results of previous import runs.

Click the Run Import Now button to start the import process. Once the import completes, the Commission Plan Adjustment Import Log will print, displaying the resulting of the import run.



If you wish to re-import a particular adjustment document, delete the existing commission adjustment document (if one exists) via the Commission Plan Adjustment Entry window, then run the following SQL script against the DYNAMICS database (replace <Enter Sequence Number> with the adjustment document sequence number you'd like to re-import):

```
DECLARE @Seq_Num INT
```

```
SET @Seq_Num = <Enter Sequence Number>
```

```
UPDATE ETI28921 SET ETI_CP_AdjustmentNumber = "", ETI_CP_AdjImportRunID = "", ETI_ImportStatus = 0, ERMINTX = "" where SEQNUMBR = @Seq_Num
```

```
UPDATE ETI28922 SET ETI_CP_AdjustmentNumber = "", ETI_CP_AdjImportRunID = "", ETI_ImportStatus = 0, ERMINTX = "" where SEQNUMBR = @Seq_Num
```

```
UPDATE ETI28923 SET ETI_CP_AdjustmentNumber = "", ETI_CP_AdjImportRunID = "", ETI_ImportStatus = 0, ERMINTX = "" where SEQNUMBR = @Seq_Num
```

You'll also want to resolve any issues with the adjustment document that you'd like to re-import (in the above screenshot, the Salesperson Plan I entered for PAUL W. does not exist, so I'd want to update the ASISLCMID field in table ETI\_CP\_AdjHdrImport (ETI28922) before re-importing the adjustment document).

Now click the Run Import Now button to start the import process.

# Inserting Plan Assignments

## Salesperson Plan to Salesperson

When using an integration tool such as eConnect to create new salespeople, you may also wish to create the Salesperson Plan > Salesperson assignments at that time. These assignments are stored in table ASI28060 in the company database. Create entries in the assignment table as follows (null values are not allowed):

SLPRSNID: Set to Salesperson from Salesperson Master (RM00301).

ASISLCMID: Set to Salesperson Plan from Salesperson Plan Master (ASI28030).

ETI\_CP\_SPClassID: If using Salesperson Classes, set to Salesperson Class from Salesperson Class Master (ETI28030); otherwise, set to " (empty string).

ASISLMRID (field not in use): Set to " (empty string).

ETI\_Hold\_Commissions: Set to one of the following values:

- 0 (Commissions for this salesperson will not be placed on hold as they are created)
- 1 (Commissions for this salesperson will be placed on hold as they are created)

ETISLSPRSONCOMPAYTYPE (determines when commissions are released for processing): Set to the value of the ASICOMPAYTY column in the Commission Plan Setup table (ASI28901) if that value is not 3 (Based on Salesperson); otherwise, set to one of the following values:

- 1 (Document is Posted)
- 2 (Document is Paid)

ETI\_CP\_Trx\_Type (determines what Dynamics GP transaction will be created when commissions are processed): Set to one of the following values:

- 0 (No Dynamics GP transaction)
- 1 (General Ledger – the ETI\_CP\_CreateGL column in the Commission Plan Setup table (ASI28901) must be set to 1 to select this option)
- 2 (Payables – the ETI\_CP\_CreatePayables column in the Commission Plan Setup table (ASI28901) must be set to 1 to select this option)
- 3 (Payroll – the ETI\_CP\_CreatePayroll column in the Commission Plan Setup table (ASI28901) must be set to 1 to select this option)

ETI\_CP\_CreateAccruals (determines whether accrual transactions may be created): Set to one of the following values:

- 0 (Accrual transactions may not be created for the salesperson)
- 1 (Accrual transactions may be created for the salesperson – the ETI\_CP\_CreateAccruals column in the Commission Plan Setup table (ASI28901) must be set to 1 to select this option)

COMEXPIX: If ETI\_CP\_Trx\_Type > 0 or ETI\_CP\_CreateAccruals = 1, set to Account Index from Account Master (GL00100) for the desired commission expense account; otherwise, set to 0.

COMPAYIX: If ETI\_CP\_Trx\_Type > 0 or ETI\_CP\_CreateAccruals = 1, set to Account Index from Account Master (GL00100) for the desired commission payable account; otherwise, set to 0.

PAYRCORD: If ETI\_CP\_Trx\_Type = 3 (Payroll), set to Pay Record from Payroll Pay Code Setup (UPR40600) for the desired commission pay code (PAYTYPE must be 4); otherwise, set to " (empty string).

**Example:**

A new salesperson with an ID of KEVIN R will be imported into the Salesperson Master table (RM00301), and we want to assign salesperson plan SALES REP to this new salesperson. Commission Plan is set up to process commissions when sales documents are paid off, no Dynamics GP transactions are created when commissions are processed, and commission accrual transactions are not created. A possible SQL insert statement for this example is as follows:

```
INSERT INTO ASI28060
(
  SLPRSNID,
  ASISLCMID,
  ETI_CP_SPClassID,
  ASISLMRID,
  ETI_Hold_Commissions,
  ETISLSPRSONCOMPAYTYPE,
  ETI_CP_Trx_Type,
  ETI_CP_CreateAccruals,
  COMEXPIX,
  COMPAYIX,
  PAYRCORD
)
VALUES
(
  'KEVIN R',
  'SALES REP',
  "",
  "",
  0,
  (SELECT ASICOMPAYTY FROM ASI28901),
  0,
  0,
  0,
  0,
  ""
)
```

The above statement uses the VALUES clause to provide the data to insert. Your statement will most likely instead use a SELECT clause, to obtain the SLPRSNID value from the imported salesperson record.

The above statement assumes that the ASISLCMID value exists in the Salesperson Plan Master table (ASI28030) and performs no validation of this assumption.

## Customer Plan to Customer

When using an integration tool such as eConnect to create new customers, you may also wish to create the Customer Plan > Customer assignments at that time. These assignments are stored in table ASI28050 in the company database. Create entries in the assignment table as follows (null values are not allowed):

CUSTNMBR: Set to Customer Number from Customer Master (RM00101).

ASICUCMID: Set to Customer Plan from Customer Plan Master (ASI28010).

ETI\_CP\_IgnoreTerritorySP: Set to one of the following values:

- 0 (When commissions are created for a sales document for this customer, commission salespeople assigned to the sales document's Sales Territory in table ETI28250)
- 1 (When commissions are created for a sales document for this customer, do not commission any salespeople assigned to the sales document's Sales Territory in table ETI28250)

ETI\_CP\_UDEFValue1: if Commission Plan User-Defined 1 is in use, set to a value found in the ETI\_CP\_UserDefinedValue column of table ETI40400 where the INDEX1 column value is 1; otherwise, set to " (empty string).

### Example:

A new customer with an ID of ETHOTECH will be imported into the Customer Master table (RM00101), and we want to assign customer plan RETAIL to this new customer. Commission Plan User-Defined 1 is not in use. A possible SQL insert statement for this example is as follows:

```
INSERT INTO ASI28050
(
  CUSTNMBR,
  ASICUCMID,
  ETI_CP_IgnoreTerritorySP,
  ETI_CP_UDEFValue1
)
VALUES
(
  'ETHOTECH',
  'RETAIL',
  0,
  ''
)
```

The above statement uses the VALUES clause to provide the data to insert. Your statement will most likely instead use a SELECT clause, to obtain the CUSTNMBR value from the imported customer record.

The above statement assumes that the ASICUCMID value exists in the Customer Plan Master table (ASI28010) and performs no validation of this assumption.

## Item Plan to Item

When using an integration tool such as eConnect to create new inventory items, you may also wish to create the Item Plan > Item assignments at that time. These assignments are stored in table ASI28040 in the company database. Create entries in the assignment table as follows (null values are not allowed):

ITEMNMBR: Set to Item Number from Inventory Master (IV00101).

ASIITCMID: Set to Item Plan from Item Plan Master (ASI28020).

ETI\_CP\_PriceType: Set to the value of the ETI\_CP\_PriceType column in the Commission Plan Setup table (ASI28901) if that value is not 2 (Based on Item); otherwise, set to one of the following values:

- 0 (Sales Document Price)
- 1 (List Price)

ETI\_CP\_PriceMultiplier: Set to the value of the ETI\_CP\_PriceMultiplier column in the Commission Plan Setup table (ASI28901) if the ETI\_CP\_PriceType column in the Commission Plan Setup table (ASI28901) is not 2 (Based on Item); otherwise, set to an integer between 0 and 32767 that represents the multiplier percentage (Examples: 725 = 7.25%, 5000 = 50%, 10000 = 100%, 32767 = 327.67%).

ETI\_CP\_CostType: Set to the value of the ETI\_CP\_CostType column in the Commission Plan Setup table (ASI28901) if that value is not 4 (Based on Item); otherwise, set to one of the following values:

- 0 (Sales Document Cost)
- 1 (Sales Document Price)
- 2 (Standard Cost)
- 3 (List Price)

ETI\_CP\_CostMultiplier: Set to the value of the ETI\_CP\_CostMultiplier column in the Commission Plan Setup table (ASI28901) if the ETI\_CP\_CostType column in the Commission Plan Setup table (ASI28901) is not 4 (Based on Item); otherwise, set to an integer between 0 and 32767 that represents the multiplier percentage (Examples: 725 = 7.25%, 5000 = 50%, 10000 = 100%, 32767 = 327.67%).

### Example:

A new item with an ID of SATA-HD will be imported into the Item Master table (IV00101), and we want to assign item plan HARDWARE to this new item. Commission Plan is set up to determine the commissionable sale and cost amounts from the sales document line item extended price and cost. A possible SQL insert statement for this example is as follows:

```
INSERT INTO ASI28040
(
ITEMNMBR,
ASIITCMID,
ETI_CP_PriceType,
ETI_CP_PriceMultiplier,
ETI_CP_CostType,
ETI_CP_CostMultiplier
)
VALUES
```



```
(  
'SATA-HD',  
'HARDWARE',  
(SELECT ETI_CP_PriceType FROM ASI28901),  
(SELECT ETI_CP_PriceMultiplier FROM ASI28901),  
(SELECT ETI_CP_CostType FROM ASI28901),  
(SELECT ETI_CP_CostMultiplier FROM ASI28901)  
)
```

The above statement uses the VALUES clause to provide the data to insert. Your statement will most likely instead use a SELECT clause, to obtain the ITEMNMBR value from the imported item record.

The above statement assumes that the ASIITCMID value exists in the Item Plan Master table (ASI28020) and performs no validation of this assumption.

## Database Schema

Commission Plan data is stored in the tables listed below:

### Setup Tables

<u>Physical Name</u>	<u>Display Name</u>
ASI28010	ASI_Customer_Commission_ID_MSTR
ASI28020	ASI Item Commission ID MSTR
ASI28030	ASI Salesperson Commission ID MSTR
ASI28040	ASI IV Item MSTR Commission
ASI28050	ASI_RM_Customer_MSTR_Commission
ASI28060	ASI RM Salesperson MSTR Commission
ASI28070	ASI Sales Manager MSTR (not currently used)
ASI28101	ASI Commission Plan
ASI28210	ASI_Customer_Salesperson_MSTR
ASI28220	ASI_Item_Salesperson_MSTR
ASI28230	ASI_Salesperson_Salesperson_MSTR (not currently used)
ASI28901	ASI_Commission_Plan_Setup
ETI28030	ETI_CP_SalespersonClassMSTR
ETI28050	ETI_CP_SPFromGroupMSTR
ETI28101	ETI_CP_Plan_Combination_MSTR
ETI28250	ETI_CP_Territory_Salesperson_MSTR
ETI28260	ETI_CP_UserDef1_Salesperson_MSTR
ETI28902	ETI_Comm_Plan_Tiers_MSTR
ETI28903	ETI_Comm_Plan_Doc_ID_Ignore
ETI28904	ETI_Comm_Plan_Credit_Card_MSTR
ETI28906	ETI_Comm_Plan_Payment_Terms_MSTR
ETI28908	ETI_Comm_Plan_Past_Due_MSTR
ETI28909	ETI_Doc_Past_Due
ETI28916	ETI_CP_Quota_MSTR_HDR
ETI28917	ETI_CP_Quota_MSTR_LINE
ETI28918	ETI_CP_Quota_Period_MSTR_HDR
ETI28919	ETI_CP_Quota_Period_MSTR_LINE
ETI40400	ETI_CP_UserDefined_SETP
ETI60100	ETI_CP_UserCompanyMiscAccess (GP system database)

## Tracking Tables

<b>Physical Name</b>	<b>Display Name</b>
ASI28301	ASI Commission Work
ASI28311	ASI Commission Line
ASI28800	ASI Commission Plan Summary File
ETI28302	ETI_SOP_HDR_Comm_Inactive
ETI28303	ETI_CP_Trx_HIST
ETI28304	ETI_CP_Accrual_HIST
ETI28305	ETI_SOP_HDR_Integration
ETI28306	ETI_SOP_HDR_Comm_Deleted
ETI28312	Commission Line Discount Taken
ETI28313	ETI_SOP_LINE_Tiers
ETI28316	ETI_SOP_LINE_Integration
ETI28401	ETI_CP_Quota_Summary_WORK
ETI28402	ETI_CP_Quota_SP_Summary_WORK
ETI28403	ETI_CP_Quota_SP_HDR_WORK
ETI28404	ETI_CP_Quota_SP_LINE_WORK
ETI28405	ETI_CP_Quota_SP_SOP_WORK
ETI28502	ETI_CP_Quota_SP_Period_HIST
ETI28503	ETI_CP_Quota_SP_HDR_HIST
ETI28504	ETI_CP_Quota_SP_LINE_HIST
ETI28505	ETI_CP_Quota_SP_SOP_HIST
ETI28910	ETI_SOP_HDR_Indexes
ETI28911	ETI_SOP_LINE_Indexes
ETI28913	ETI_SOP_LINE_Info
ETI28914	ETI_CP_Process_Log
ETI28915	ETI_CP_Accrual_Log
ETI28920	ETI_CP_Adjustment_Docs
ETI28921	ETI_CP_AdjDocImport
ETI28922	ETI_CP_AdjHdrImport
ETI28923	ETI_CP_AdjLineImport
ETI28924	ETI_CP_AdjImportSetup
ETI28925	ETI_CP_AdjImportProcessLog

## Extensibility and Customization

Since Commission Plan is a Dexterity application, it utilizes the Microsoft Dynamics GP architecture Dexterity customization and extension capabilities. Please refer to the appropriate documentation provided with Microsoft Dynamics GP for more information.