The EthoSeries

For Microsoft Dynamics GP 2016 R2

Contents

The EthoSeries

The EthoSeries™ offers a variety of modules for enhancing Microsoft Dynamics® GP. These solutions provide powerful, easy to use functionality to complement Microsoft Dynamics GP Sales Order Processing as well as enhance master records in all modules and the application's security system.

The EthoSeries consists of the following products.

Commission Plan

Customer Service Collection
> Includes:
> - Additional Sales Transaction Entry Fields
> - Apply Button for Sales Order Processing Inquiry
> - Check for Duplicate Purchase Orders
> - Credit Limit Process Holds
> - Customer Item Data for Sales Transaction Entry
> - Move Sales Documents
> - Print Shipping Labels
> - Restocking Charge Button for Returns
> - Track Expected Receipt Date
> - Track Unallocated Quantities

Historical Serial and Lot Number Tracking

Next Numeric Collection
> Includes:
> - Next Batch ID – Payables Batches
> - Next Batch ID – Receivables Batches
> - Next Batch ID – Sales Batches
> - Next Customer ID
> - Next Employee ID
> - Next Fixed Asset ID
> - Next Item Number
> - Next Project Accounting Contract ID
> - Next Project Accounting Project ID
> - Next Prospect ID
> - Next Salesperson ID
> - Next Vendor Number
> - Next WennSoft Job Number

Quick Track

Salesperson Enhancements

What's New

Commission Plan

- The Salesperson Commission Plan Info, alternate Salesperson Maintenance, Salesperson Class Setup, and Mass Update Salespeople windows include the following new functionality:
  - ➢ Commission Accrual Account, used when accruing commissions (previously, the Commission Payable Account was used).
  - ➢ Option to use the vendor / payables setup AP account rather than Commission Payable Account when a Payables transaction is created during commission processing.
  - ➢ Option to include taxes when a Payables transaction is created during commission processing. If this option is marked, you can choose whether to use the vendor's tax schedule or to specify a tax schedule for the salesperson.
- Added Salesperson Commission Amount and Tax Amount fields to table ETI_CP_Trx_HIST (ETI28303). When commissions are processed for a salesperson, the total commission paid to the salesperson is saved in the Salesperson Commission Amount and Document Amount fields. If a Payables transaction is created that includes taxes, the tax is saved in the Tax Amount field and the Document Amount is incremented by the tax.
- Added a new tier type: List Price Percent from Commissionable Sale Amount.
- Commission rates overrides can now be set up for a date range and salesperson, customer, and item combinations (requires Commission Plan Apex).
- The Document Date and GL Posting Date for a commission record may now be manually edited via the Commission Plan Override Dates window.
- The sales document line commissionable List Price, Standard Cost, Unit Sale Amount, and Unit Cost Amount for all associated commission lines may now be mass updated via the Commission Plan Sales Document Info window.
- The Commission Plan Override Dates and Commission Plan Sales Document Info windows may now be accessed directly from the Commission Plan Entry window.
- The Commissionable Amounts section of the Commission Plan Setup window now includes the following options:
  - ➢ Default Item Sale Amount From, used when the Sale Amount From option is set to Based on Item.
  - ➢ Default Item Cost Amount From, used when the Cost Amount From is set to Based on Item.
  - ➢ Roll down commission header splits to commission lines. If this option is selected, a split percentage entered for a commission record in the Commission Plan Entry window will appear on all commission lines and the commission lines will be recalculated (the commission header commission amount will no longer be directly reduced for the split); otherwise, a split percentage entered for a commission record in the Commission Plan Entry window will continue to reduce the commission header commission amount without affecting any commission lines.
- The Commission Processing section of the Commission Plan Setup window now includes a Default Enable Comm Processing When options, used when the Enable Comm Processing When option is set to Based on Salesperson.
- Commission setups may now be created for Salesperson, Customer, and Item classes, along with automatic rolldown options.
- Linked SOP Document and Linked SOP Type columns have been added to SQL views ETI_CP_SOPHDRComm and ETI_CP_SOPLINEComm. This allows SSRS reports and SmartList objects based on these views to group commissions for a sales document and commissions for an adjustment record linked to that sales document.

- The Commission Plan Setup window now includes an Enable/Disable SQL Triggers option, which can be used to prevent Commission Plan SQL triggers from firing when Customer Modifier and Combiner or PSTL operations perform mass updates to master records. See the Commission Plan Support for Microsoft Professional Services Tools Library documentation for more details.

Customer Service Collection

- The new Unallocated Items Inquiry window displays the sales document lines containing unallocated quantities for the selected item number.
- When creating documents in Sales Transaction Entry, the new Customer Item Data window displays the most recent purchase history for the current line item.

Security

EthoTech provides default tasks and roles for each EthoSeries module. Roles must be assigned to each user to grant the appropriate level of access to each module, and EthoSeries default tasks and rolls begin with ETI plus the module abbreviation. For example, the Next Numeric roles begin with ETI NN.
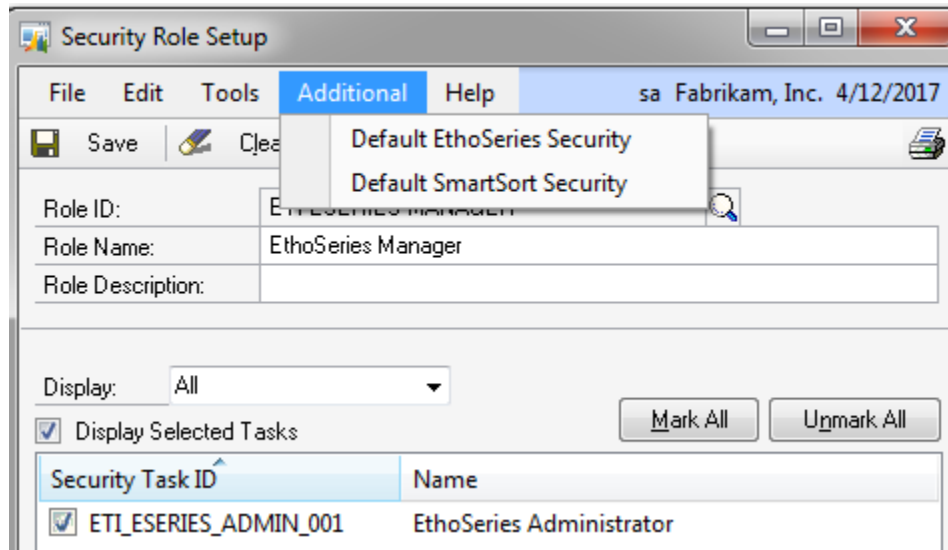
The ETI ESERIES MANAGER role should be assigned to all users who may enter EthoSeries registration keys or view the EthoTech SQL Object Initialization Log window and report.

The default tasks and roles only address EthoSeries resources, and do not modify security settings for Microsoft Dynamics GP windows, files, or reports. These default tasks and roles may not be a perfect match to your company's operating procedures. You can modify the default tasks and roles as needed, as well as create roles to suit your needs.

Included in the documentation for each EthoSeries module is a security section which details the roles for that module.

If you make changes to the default EthoSeries tasks and/or roles, you can roll back to the default settings for the tasks and roles by choosing the Additional >> Default EthoSeries Security option from the Security Role Setup or Security Task Setup window.

Hotkeys

Most EthoSeries modules utilize hotkey shortcuts to access additional functionality from Dynamics GP windows. Since multiple products installed on your system may use the same hotkey, the EthoSeries HotKey Setup window (*Tools >> Setup >> System >> EthoSeries HotKey Setup*) allows you to designate your desired hotkey per EthoSeries module for each associated Dynamics GP window.
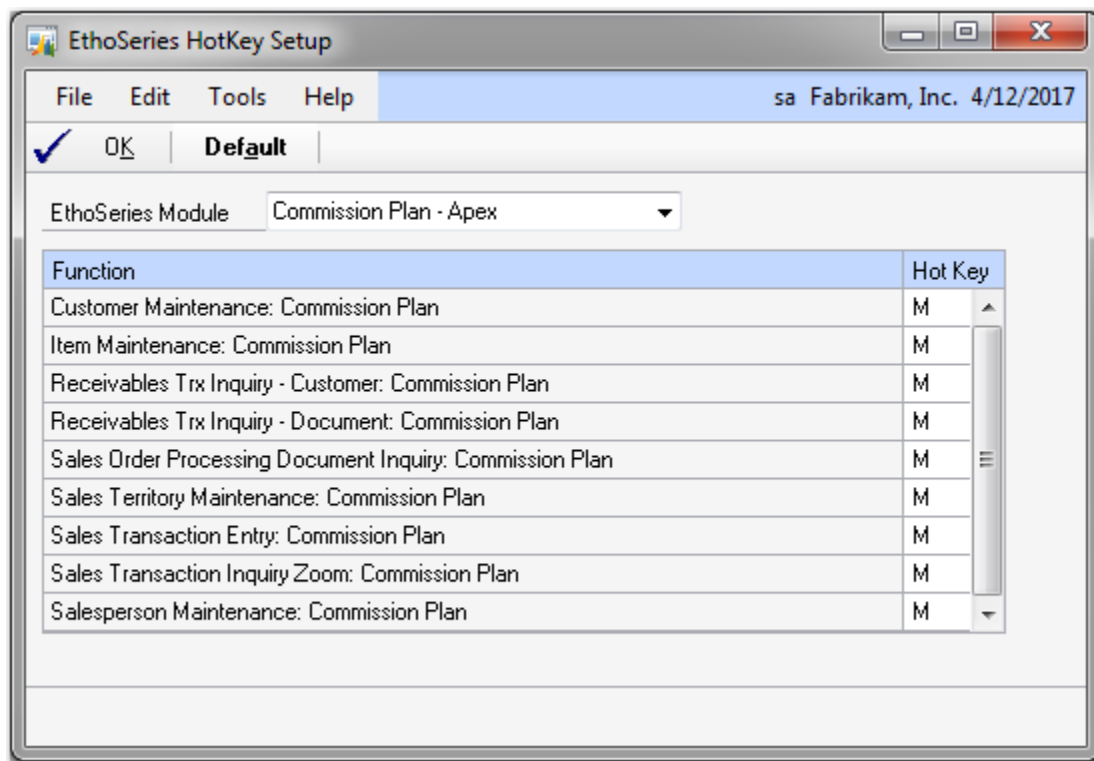
Select an **EthoSeries Module**, and the current hotkey setup is displayed for each Dynamics GP window utilized by that module. You can change or remove the hotkey for any window, or use the **Default** button to reset the hotkeys for the module to their default settings.

Any users currently logged into Dynamics GP will need to exit the system and then log back in for any hotkey changes to take effect.

Commission Plan

Security

This module includes the following default roles:
- ETI CP SOP ORDER ENTRY
- ETI CP COMMISSION ENTRY
- ETI CP INQUIRY
- ETI CP MAINT
- ETI CP MANAGER

The ETI CP SOP ORDER ENTRY role allows commissions to be automatically created and updated when sales documents are created, modified, deleted, transferred, posted, and relieved. This role should be assigned to all users who may perform one of the above operations on a sales document, but who should not be allowed to view or manually edit commissions.

The ETI CP COMMISSION ENTRY role allows commissions to be automatically created and updated and allows commissions to be viewed and manually edited. This role should be assigned to all users who may edit commissions.

The ETI CP INQUIRY role allows commissions to be displayed using the various Commission Plan inquiry windows, report windows, and the Commission Plan SmartList object. This role should be assigned to all users who may view commissions. We recommend that any Commission Plan-based SmartList Builder objects you create be assigned to task ETI_CP_INQ_001, so that access is controlled by role ETI CP INQUIRY.

The ETI CP MAINT role allows the customer plan > customer, salesperson plan > salesperson, item plan > item, salesperson > customer, and salesperson > item assignments to be edited. This role should be assigned to users who will maintain these assignments.

The ETI CP MANAGER role allows full access to all Commission Plan functionality. This role should be assigned to users who will set up and maintain Commission Plan as well as process and accrue commissions.

This module uses the following windows created by EthoTech: EthoSeries windows and Alternate Dynamics GP windows. EthoSeries windows are automatically assigned to your Microsoft Dynamics GP navigation during installation. Alternate Dynamics GP windows designed by EthoTech need to be granted security access in order to be utilized. Use the Microsoft Dynamics GP Security windows to grant – or remove – access to the EthoSeries and Alternate Dynamics GP windows documented below.

NOTE: Commission Plan does not require the use of any Alternate Dynamics GP windows; however they are made available for your convenience.

EthoSeries Windows
- Accrual Run Inquiry
- Accrual Runs
- Accrue Commissions
- Comm Plan Overdue Setup
- Comm Rate Override Dates
- Commission Line Trace
- Commission Adjustment Documents
- Commission Plan Adjustment Entry
- Commission Plan Adjustment Import

- Commission Adjustment Inquiry
- Commission Plan Adjustment Inquiry Zoom
- Commission Plan Adjustment Type Setup
- Commission Plan Class Update Options
- Commission Plan Credit Card Setup
- Commission Plan Customer Class Setup
- Commission Plan Default Tiers
- Commission Plan Entry
- Commission Plan Inquiry Zoom
- Commission Plan Item Class Setup
- Commission Plan Item Tiers
- Commission Plan Matrix Inquiry
- Commission Plan Matrix Setup
- Commission Plan Override Dates
- Commission Plan Payment Terms Setup
- Commission Plan Quota Report
- Commission Plan Quotas
- Commission Plan Rate Override Inquiry
- Commission Plan Rate Override Setup
- Commission Plan Reduction Inquiry
- Commission Plan Report
- Commission Plan Sales Document Info
- Commission Plan Sales Document Info Inquiry
- Commission Plan Sales Type ID Setup
- Commission Plan Salesperson Class Setup
- Commission Plan Salesperson From Ranking Inquiry
- Commission Plan Salesperson From Ranking Setup
- Commission Plan Setup
- Commission Plan Summary History
- Commission Plan Summary Utilities
- Commission Plan Tiers
- Commission Plan Tiers Rate Inquiry
- Commission Plan User Setup
- Commission Plan User-Defined Setup
- Commission Plan User-Defined Values
- Commission Plan Utilities
- Commission Plan Utilities Sales Type ID Restrictions
- Commission Rate Override IDs
- Commission Run Inquiry
- Commission Runs
- Customer Commission Plan Info
- Customer Commission Plan Info Inquiry
- Customer Commission Plan Setup
- Customer Plans
- EthoTech Series Attribute Setup
- Item Commission Plan Info
- Item Commission Plan Info Inquiry
- Item Commission Plan Setup
- Item Plans
- Mass Update Customers
- Mass Update Salespeople
- Mass Update Items
- Noncommissioned Salesperson Inquiry

- Process Commissions
- Sales Territory Commission Plan Info
- Sales Territory Commission Plan Info Inquiry
- Salesperson Accrual Run Inquiry
- Salesperson Commission Plan Info
- Salesperson Commission Plan Setup
- Salesperson Classes
- Salesperson Commission Quota Inquiry
- Salesperson Commission Quota Inquiry – Period
- Salesperson Commission Quota Inquiry - Period Detail
- Salesperson Commission Quota Inquiry - Period Documents
- Commission Plan Quota Periods Setup
- Salesperson Commission Run Inquiry
- Salesperson Plans
- User-Defined 1 Commission Plan Info
- User-Defined 1 Commission Plan Info Inquiry

*Refer to **Appendix A** for details on locating EthoSeries windows in Dynamics GP.*

Alternate Dynamics GP Windows

Series	Window Name	Required
Inventory	Item Maintenance	Optional - recommended
Sales	Customer Maintenance	Optional - recommended
Sales	Salesperson Maintenance	Optional - recommended
Sales	Receivables Transaction Inquiry - Customer	Optional
Sales	Receivables Transaction Inquiry - Document	Optional
Sales	Sales Order Processing Document Inquiry	Optional
Sales	Sales Transaction Entry	Optional – not recommended
Sales	Sales Transaction Inquiry Zoom	Optional

Product Overview

This document assumes a working knowledge of the Microsoft Dynamics GP Sales Order Processing and Receivables modules.

The EthoTech Commission Plan module is designed to help you calculate the commission or royalties due for Sales Order Processing documents within the Application. Commission Plan does not use or change the Microsoft Dynamics GP standard commission capabilities in any way; instead, an entirely new set of windows and functionality has been added for Commission Plan that can be accessed through the windows described in this document.

How do the various Commission Plan products differ?

Historically, Commission Plan was sold on a user-count basis, and users had access to all Commission Plan functionality. When a client purchased additional Microsoft Dynamics GP users, they also had to purchase additional Commission Plan users. Commission Plan is now sold on a site-license basis, and is split into 2 products: Commission Plan Keystone and Commission Plan Apex. Clients still running under the user-count basis licensing system have access to the Commission Plan Apex functionality.

Commission Plan Apex is required to access the following functionality:
- Quotas matrix option
- Tiers matrix option
- Pay commission to a single salesperson multiple times for a sales document
- Import commission adjustments
- Integration engine - commission header and line table integration
- Assign salespeople to customer user defined values
- Reduce commissions for overdue invoices
- Automatic commission rate overrides

In the Microsoft Dynamics GP sample company, you can use the EthoTech Series Attribute Setup window to enable Commission Plan Apex (default), Commission Plan Keystone, or neither. This window is available from the Options menu on the EthoTech Registration and the Commission Plan Setup windows. This will allow you to test the differences between the products.

How are commissions calculated?

Commission records are automatically created/updated when a sales document is saved, posted or transferred; when the Commission Plan Entry window is opened (for unposted sales documents); when using Commission Plan Utilities; or, when using Microsoft Dynamics GP Integration Manager. ***Commission records may be edited after the associated sales document is posted***.

Commission Plan utilizes a commission header record that contains summary information for each salesperson receiving commissions on a given sales document and commission detail records that contain line item detail information for each salesperson for each sales document line item.

If Commission Plan is set up to use the **Standard** or **Tiers** matrix option:
Commission amounts are calculated per sales document line item and the combination of the customer, item and salesperson determines the commission type and rate. The available commission types are % of Margin, % of Sale, Flat Amount, and Per Unit.

If Commission Plan is set up to use the **Quotas** matrix option:
Commissionable sale and cost amounts are tracked per sales document line item. These commissionable amounts are aggregated over a period of time, and a commission amount is calculated using this summary information. The combination of the customer, item and salesperson determines how commissions will be calculated for the summary information. The available commission types are % of Margin and % of Sale.

How is the commission rate determined?

In the most simple commission scenario, all salespeople are paid the same commission on every item sold to any customer. In the most complex scenario, each salesperson is paid a different commission on each different item sold to each different customer, meaning that if you had 10 salespeople, 100 items, and 500 customers you would have 500,000 different commission rates to track (10 * 100 * 500)! Commission Plan provides a mechanism to simplify the setup and maintenance of the commission rates, as maintaining 500,000 different rates would be onerous. Commission Plan uses Customer Plans to group similar customers, Salesperson Plans to group similar salespeople, and Item Plans to group similar inventory items; these Plan Combinations (rather than the combination of the individual customers, salespeople, and items) are used to determine a commission rate.

Commission types and rates are assigned to the various combinations of Salesperson Plans, Customer Plans, and Item Plans in the Commission Plan Matrix Setup window, and the combinations are referred to as the commission matrix.

If Commission Plan is set up to use the **Standard** matrix option:

> A single commission rate may be assigned to a plan combination.

If Commission Plan is set up to use the **Tiers** matrix option:

> Multiple commission rates may be assigned to a plan combination, allowing for "sliding scales" or "groupings" of commission rates based on one of several tier types: commissionable sale amount, margin amount, margin percent, price level, quantity in base unit of measure, unit price, unit price from commissionable sale amount, unit price from extended price, Commission Recognition Date, and the Site ID. These scales apply only to the current sales document line item, and commission rates are inclusive rather than stepped (once a rate level is achieved, the associated commission rate is applied to the entire line item).

If Commission Plan is set up to use the **Quotas** matrix option:

> Multiple commission rates may be assigned to a plan combination for a given period of time, allowing for "sliding scales" based on one of two quota types: commissionable sale amount, margin amount. These scales apply to the aggregated commissionable sale or margin amounts for the selected period, and commission rates may be stepped (once a quota level is achieved, the associated commission rate is applied to the portion of the commissionable sale or margin amount for that level only) or inclusive (once a rate level is achieved, the associated commission rate is applied to the entire commissionable sale or margin amount).

Who receives commission?

For each sales document, Commission Plan can create commissions for the salesperson displayed in the Sales Customer Detail Entry window (the sales document header salesperson) and/or the salesperson displayed in the Sales Item Detail Entry window for each line item (the sales document line item salesperson). If you choose to commission the sales document header salesperson, that salesperson receives commissions for all line items on the document. If you choose to commission the sales document line item salesperson, each salesperson will receive commissions only for those line items to which he or she is assigned.

Commission Plan also allows you to assign multiple salespeople to individual customers, sales territories, customer user defined values, and inventory items. These salespeople receive commissions in addition to the salesperson(s) assigned to the sales document.

A typical scenario for assigning salespeople to a customer is as follows:

- Multiple salespeople "share" a customer and all receive commissions when a sales document is created for that customer.

Two typical scenarios for assigning salespeople to a sales territory are as follows:

- A Sales Manager assigned to a territory so that they are commissioned each time a sales document is created for a customer in their territory.
- Multiple salespeople "share" a territory and all receive commissions when a sales document is created for a customer in their territory.

A typical scenario for assigning salespeople to a customer user defined value is as follows:

- Groups of customers are broken up into sub-territories within a sales territory, and managers and/or salespeople receive commission when a sales document is created for a customer in their sub-territory (as defined by the association of the customer to a particular user-defined value).

Two typical scenarios for assigning salespeople to an inventory item are as follows:

- Product managers assigned to each item for which they are responsible so that they are commissioned each time one of their items appears on a sales document.
- External persons or companies who are paid a royalty each time one of their items appears on a sales document.

How do splits work?

In many commission systems, a total commission is calculated for a sales document and that total may then be distributed (split) to multiple salespeople. Since Commission Plan calculates the commission independently for each salesperson for each sales document line item, and each salesperson may have a different commission rate for each line item, there is no pre-determined total commission for the sales document. Therefore, splits in Commission Plan are defined as a percentage of the salesperson's normally calculated commission.

Commission Plan provides for two split calculation methods:
1. Calculate the commission amount, and then multiply by the split percentage.
2. Multiply the commissionable sale and cost amounts by the split percentage, and then calculate the commission amount.

Example: Paul normally receives a commission of 10% of the margin of an item and I have set Paul's split percentage to 30% for a particular sales document, whose line item sale amount is $100.00 and line item cost amount is $60.00.

> Split Option 1: The gross commission amount is $4.00 [(100.00 – 60.00) * .10], and the net commission amount is $1.20 [4.00 * .30].

> Split Option 2: The commissionable sale amount is $30.00 [100.00 * .30], the commissionable cost amount is $18.00 [60.00 * .30], and both the gross and net commission amounts are $1.20 [(30.00 – 18.00) * .10].

How are commissions paid?

Commission Plan includes a routine for processing commissions (paying them to the salespeople). Commission Plan can be set up to create GL, Payables, and/or Payroll transactions, or used as a reporting tool to outside Payroll systems. Commissions are released for processing either when sales documents are posted or fully relieved, depending on your setup options.

Why aren't commission GL distributions attached to sales documents?

Using standard Microsoft Dynamics GP commissions, commission expense and payables GL distributions are created when sales documents are created. Once a sales document is posted, these distributions, along with their associated commission amounts, are no longer editable. When you pay a salesperson, you relieve the commission payable amount.

Since Commission Plan allows you to edit commissions for posted sales documents, the product does not create GL distributions when sales documents are created or posted. Instead, GL distributions are created when commissions are processed and when commissions are accrued. In this way, Commission Plan is mimicking the functionality of Microsoft Dynamics GP, only in arrears.

Each salesperson can be set up to create GL, Payables, or Payroll transactions, and each salesperson can be set up to allow commission accruals. Commission expense and payable GL accounts are assigned to each salesperson, and a commission payroll code is assigned to each salesperson set up to create payroll transactions. The payroll code should be set up to relieve the commission payable account.

Let's say we have the following salespeople set up:

Salesperson ID	Transaction Type	Include in Accruals	Vendor ID	Employee ID
GARY W	GL	Yes		
IAN M	Payables	Yes	ROYALTYCO	
SANDRA M	Payroll	Yes		SANDRA M

When commissions are processed for each salesperson, the following Microsoft Dynamics GP transactions are created:

- GARY W – an unposted general journal entry is created for the salesperson's total commission amount, using the salesperson's commission GL accounts. When you actually pay the salesperson, it's up to you to relieve the commission payable amount.

- IAN M – an unposted payables voucher is created for vendor ROYALTYCO, for the salesperson's total commission amount, using the salesperson's commission GL accounts. An invoice is created if the total is greater than zero; otherwise a credit memo is created. When you cut a check to the vendor, the commission payable amount is relieved.

- SANDRA M – an unposted payroll transaction is created for employee SANDRA M, for the salesperson's total commission amount, using the salesperson's payroll code; and an unposted general journal entry is created for the salesperson's total commission amount, using the salesperson's GL accounts. We create the general journal entry to book the commission expense and payable amount; when you cut a check to the salesperson, the commission payable amount is relieved.

In each case, we're automatically creating the appropriate commission GL distributions in Microsoft Dynamics GP. But wait a minute - what about commissions that haven't been processed? There are no GL distributions for those commissions, so my period reporting will be off! To ensure accurate commission reporting, Commission Plan includes an end of month Commission Accrual routine. This routine creates an unposted general journal entry for each salesperson's total unprocessed commission amount for posted sales documents, using the salesperson's commission GL accounts. The general journal entry reverses the following day (typically, the first day of the next month), so future edits made to these commission records will be booked correctly. ***The Commission Accrual routine should be run AFTER all commissions have been processed for the month to avoid double booking; and we suggest using the last day of the month as your Accrual cutoff date.***

Between the transactions created when commissions are processed and the transactions created when commissions are accrued, Commission Plan provides complete commission period reporting in the general ledger, while providing you the freedom to edit commissions for posted sales documents!

Module Setup

Designing the Commission Matrix

Designing the commission matrix (the combination of Salesperson Plans, Customer Plans, and Item Plans to which commission rates are assigned) is the most intricate part of setting up the system.

To determine how many Salesperson Plans you'll need, consider this question: if different salespeople sell the same item to the same customer, does the commission rate vary? If the answer is no, then you only need one Salesperson Plan. If the answer is yes, then you need as many Salesperson Plans as you have commission rates that vary by salesperson.

To determine how many Customer Plans you'll need, consider this question: if the same salesperson sells the same item to different customers, does the commission rate vary? If the answer is no, then you only need one Customer Plan. If the answer is yes, then you need as many Customer Plans as you have commission rates that vary by customer.

To determine how many Item Plans you'll need, consider this question: if the same salesperson sells different items to the same customer, does the commission rate vary? If the answer is no, then you only need one Item Plan. If the answer is yes, then you need as many Item Plans as you have commission rates that vary by item.

If Commission Plan is set up to use the **Quotas** matrix option:
Quota setups are defined per plan combination. This means if you have one salesperson plan, one customer plan, and two item plans, then two Quota setups need to be configured. A salesperson selling items that fall into both item plans will have two separate commission amounts calculated – one for each plan combination.

Salesperson Commission Plan Setup
Sales Area Page >> Setup >> Commission Plan >> Salesperson Commission Plan Setup

The Salesperson Commission Plan Setup window is used to create Salesperson Plans, which are then assigned to salespeople. A Description must be associated with the Salesperson Plan. Commission Plan will calculate $0.00 commissions for salespeople that are not assigned to a Salesperson Plan.
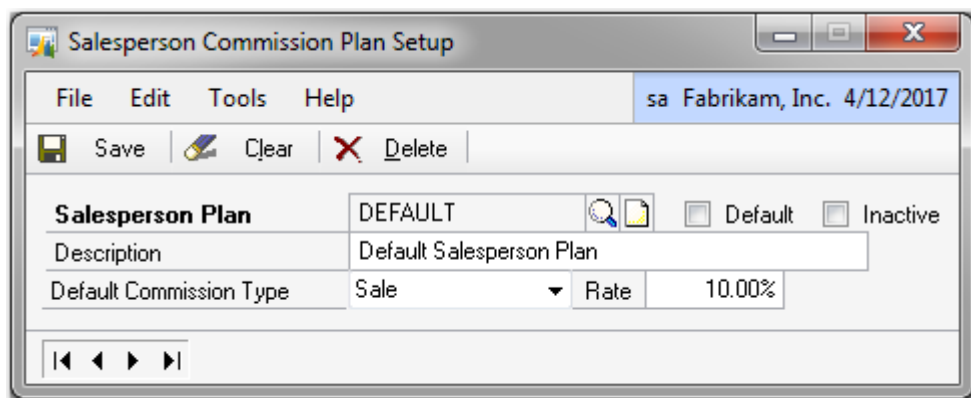
One Salesperson Plan will be created for each different type of salesperson, for commission purposes, that exists in your database. For example, if you pay Mary a different commission for selling a bale of wool to Aaron Fitz Electrical than you pay to Jim for selling a bale of wool to Aaron Fitz Electrical, you would need two Salesperson Plans. We strongly recommend that you do not refer to percentages or amounts in the Salesperson Plan or Description, as the Plan Combination (the intersection of the

Salesperson Plan, Customer Plan, and Item Plan) determines a commission rate, not the individual Salesperson Plan.

Marking the **Default** checkbox will cause the current Salesperson Plan to be assigned whenever a new salesperson is created.

If a Salesperson Plan is assigned to a salesperson or if commissions exist for the plan, then it may not be deleted. In this case, marking the **Inactive** checkbox will prevent it from being assigned to salespeople in the future, and it will prevent users from modifying the plan's commission rates in the Commission Plan Matrix Setup window. Commissions for salespeople already assigned to the plan will not be affected.

Setting a **Default Commission Type** and **Rate** will default these values when entering new Customer Plan – Item Plan combinations for the Salesperson Plan in the Commission Plan Matrix Setup window. This option is available only when using the Standard Matrix Option.

Commission Plan provides the following methods of assigning Salesperson Plans to salespeople:

- The Salesperson Maintenance window (*Sales Area Page >> Cards >> Salesperson*) has been modified for Commission Plan by adding the Salesperson Plan field in the Commission Plan section.

Enter a **Salesperson Plan**

Security must be set to allow access to our alternate Salesperson Maintenance window.

- The Salesperson Commission Plan Info window contains the Salesperson Plan field. See the Salesperson Commission Plan Info section of this document for details.
- The Commission Plan Salesperson Class Setup window may be used to set the Salesperson Plan for all salespeople assigned to a class.
- The Mass Update Salespeople window allows you to assign a Salesperson Plan to a range of salespeople and to update commission processing information. See the Mass Update Salespeople section of this document for details.

Customer Commission Plan Setup
Sales Area Page >> Setup >> Commission Plan >> Customer Commission Plan Setup

The Customer Commission Plan Setup window is used to create Customer Plans, which are then assigned to customers. A Description must be associated with the Customer Plan. Commission Plan will calculate $0.00 commissions for customers that are not assigned to a Customer Plan.
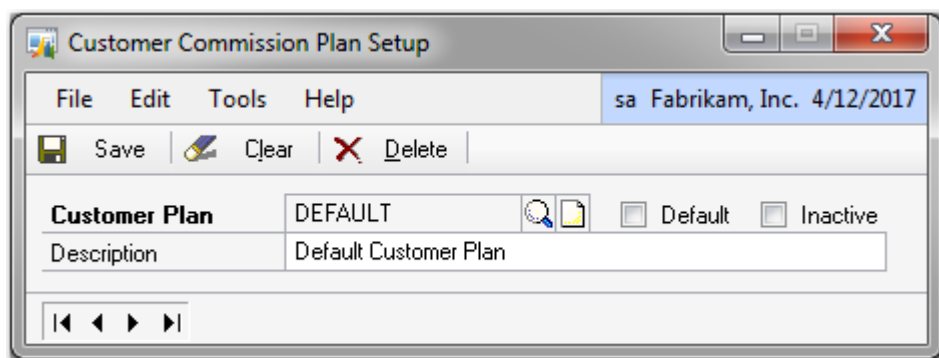
One Customer Plan will be created for each different type of customer, for commission purposes, that exists in your database. For example, if you pay Mary a different commission for selling a bale of wool to Aaron Fitz Electrical than to Adam Park Resort, you would need two Customer Plans. We strongly recommend that you do not refer to percentages or amounts in the Customer Plan or Description, as Plan Combination (the intersection of the Salesperson Plan, Customer Plan, and Item Plan) determines a commission rate, not the individual Customer Plan.

Marking the **Default** checkbox will cause the current Customer Plan to be assigned whenever a new customer is created.

If a Customer Plan is assigned to a customer or if commissions exist for the plan, then it may not be deleted. In this case, marking the **Inactive** checkbox will prevent it from being assigned to customers in the future. Commissions for customers already assigned to the plan will not be affected.

Commission Plan provides the following methods of assigning Customer Plans to customers:

- The Customer Maintenance window (*Sales Area Page >> Cards >> Customer*) has been modified for Commission Plan by adding the Customer Plan field at the bottom left.

Enter a
Customer Plan

Security must be set to allow access to our alternate Customer Maintenance window.

- The Customer Commission Plan Info window contains the Customer Plan field. See the Customer Commission Plan Info section of this document for details.
- The Commission Plan Customer Class Setup window may be used to set the Customer Plan for all customers assigned to a class.
- The Mass Update Customer window allows you to assign a Customer Plan to a range of customers. See the Mass Update Customers section of this document for details.

Item Commission Plan Setup
Sales Area Page >> Setup >> Commission Plan >> Item Commission Plan Setup

The Item Commission Plan Setup window is used to create Item Plan IDs, which are then assigned to inventory items. A Description must be associated with the Item Plan ID. Commission Plan will calculate $0.00 commissions for items that are not assigned to an Item Plan.
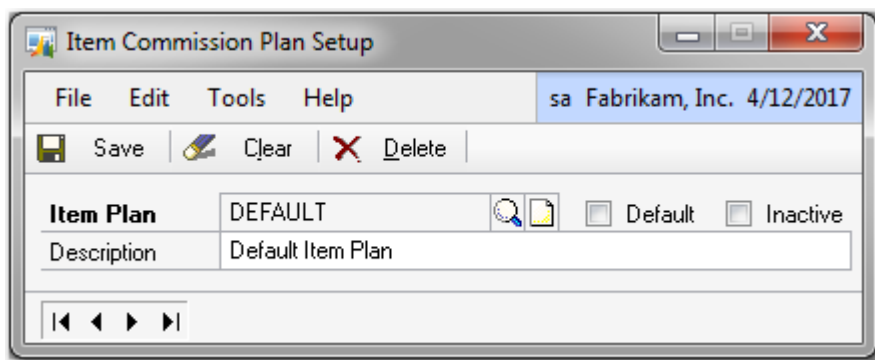
One Item Plan will be created for each different type of item, for commission purposes, that exists in your database. For example, if you pay Mary a different commission for selling a bale of wool to Aaron Fitz Electrical than for selling a green phone to Aaron Fitz Electrical, you would need two Item Plans. We strongly recommend that you do not refer to percentages or amounts in the Item Plan or Description, as the Plan Combination (the intersection of the Salesperson Plan, Customer Plan, and Item Plan) determines a commission rate, not the individual Item Plan.

Marking the **Default** checkbox will cause the current Item Plan to be assigned whenever a new inventory item is created.

If an Item Plan is assigned to an item or if commissions exist for the plan, then it may not be deleted. In this case, marking the **Inactive** checkbox will prevent it from being assigned to items in the future. Commissions for items already assigned to the plan will not be affected.

Commission Plan provides the following methods of assigning Item Plans to items:

- The Item Maintenance window (*Inventory Area Page >> Cards >> Item*) has been modified for Commission Plan by adding the Item Plan field at the bottom left.

Enter an **Item Plan** →

Security must be set to allow access to our alternate Item Maintenance window.

- The Item Commission Plan Info window contains the Item Plan field. See the Item Commission Plan Info section of this document for details.
- The Commission Plan Item Class Setup window may be used to set the Item Plan for all items assigned to a class.
- The Mass Update Items window allows you to assign an Item Plan to a range of inventory items. See the Mass Update Items section of this document for details.

Commission Plan Setup
Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup

The Commission Plan Setup window is used to set the parameters by which Commission Plan will operate and is divided into 8 sections.

Commissionable Sales Documents   Commissionable Amounts

Commission Adjustment Options   Commission Reductions

Commission Matrix Options   Salespeople Receiving Commissions

Commission Plan Assignments   Commission Processing

From this window you can access all aspects of commission configuration and identify all the features in Commission Plan you wish to activate.

In the Microsoft Dynamics GP sample company, the **Enable Apex or Keystone** selection on the Options menu opens the EthoTech Series Attribute Setup window, which allows you to enable Commission Plan Apex (default), Commission Plan Keystone, or neither. This will allow you test the differences between the two EthoTech commission products.
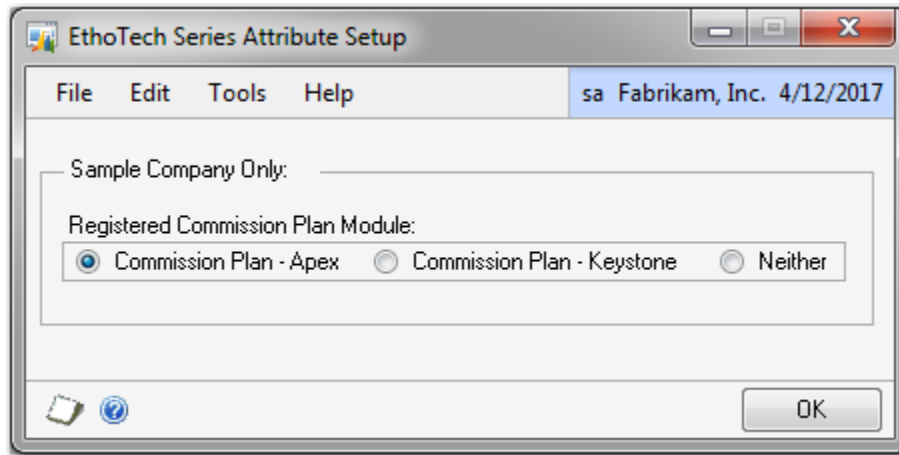
> ⚠️ *If you choose Neither and close the Commission Plan Setup window, you won't be able to access any Commission Plan functionality. Use the Options menu on the EthoTech Registration window to re-open the EthoTech Series Attribute Setup window.*

Commissionable Sales Documents
This section controls the sales documents that can have commission records created. *Invoices* and *Returns* are pre-selected as these are the only sales documents for which commissions can be processed. All other document types are optional. Commissions can be calculated and created at the time of order; however, they will not be processed until the order has been transferred to an invoice and posted or fully paid depending on the processing method selected.
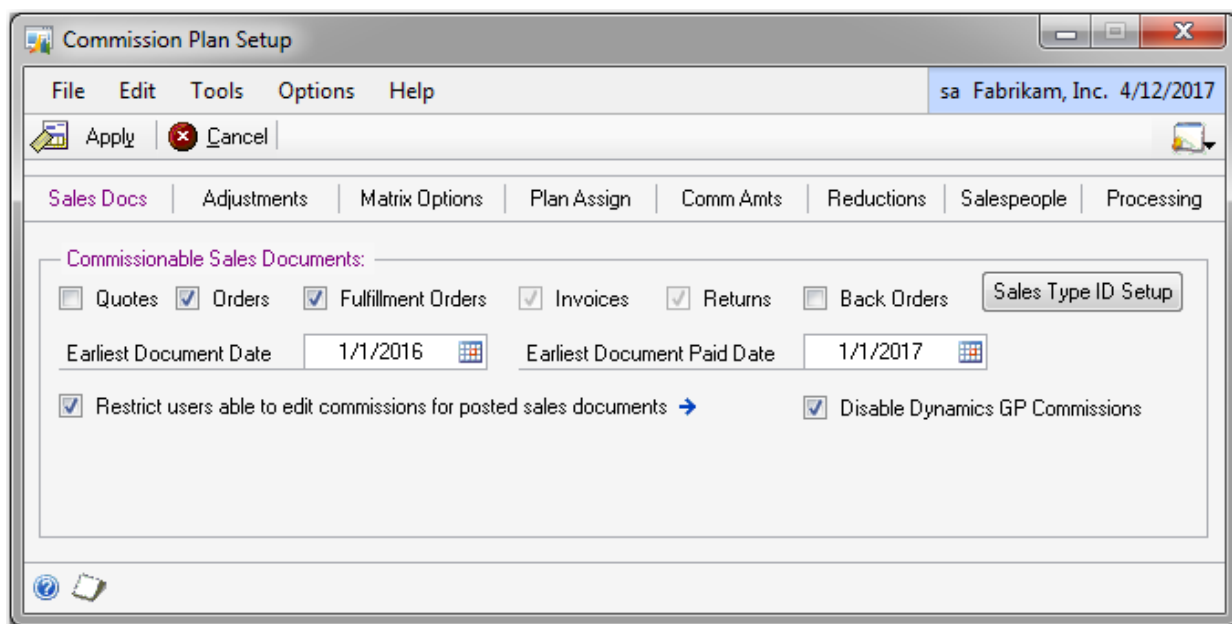
By default, Commission Plan creates commission records for any sales document assigned to a Document Type marked in the Commission Plan Setup window, regardless of the Sales Type ID used for the document. Click the **Sales Type ID Setup** button to open the Commission Plan Sales Type ID Setup window or go to *Sales Area Page >> Setup >> Commission Plan >> Commission Plan Sales Type ID Setup*. This window is used to ignore specified Sales Type IDs when creating commissions for a particular Document Type. Commissions will still be calculated for ignored Sales Type IDs in the following cases:

- The Sales Type IDs option is set to All or Restricted (and ignored Sales Type IDs are included in the restricted list) when calculating commissions using the Commission Plan Utilities window.
- A user selects a sales document in the Commission Plan Entry window and chooses to calculate commissions for the ignored Sales Type ID.
- A sales document with existing commissions is transferred and the resulting document has an ignored Sales Type ID.
- A sales document with an ignored Sales Type ID and no commissions is transferred and the resulting document has a Sales Type ID that is not ignored.
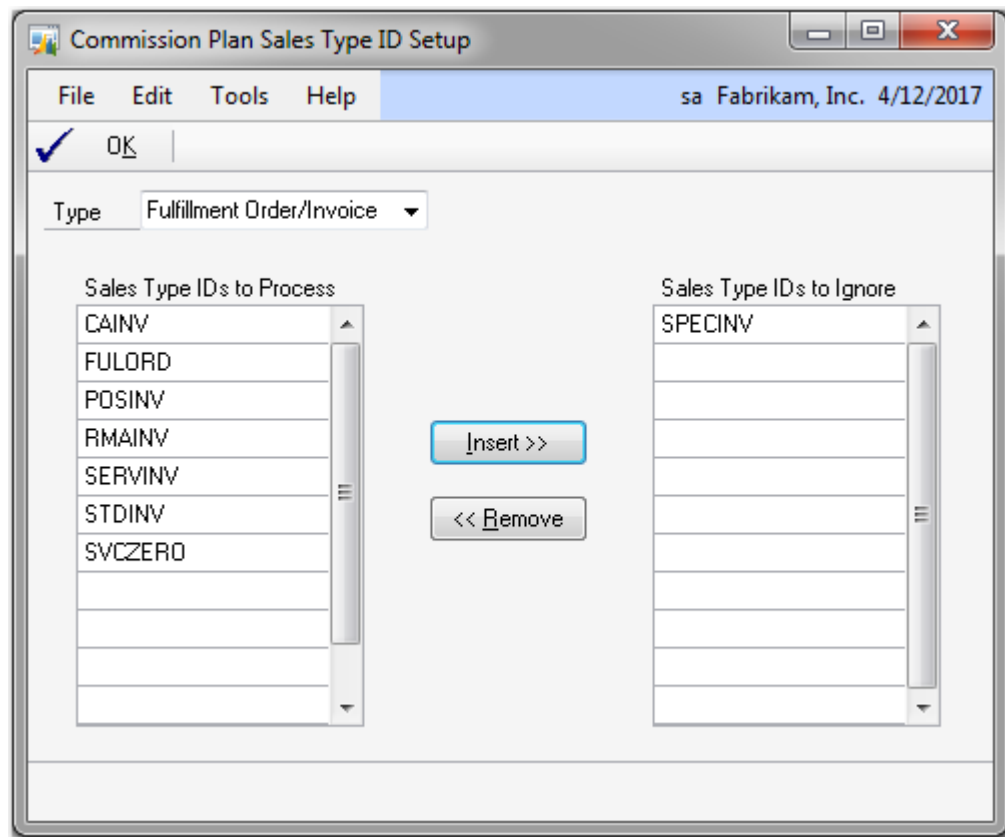
In the above example, commissions will not be automatically calculated for invoices whose Sales Type ID is SPECINV.

The **Earliest Document Date** and **Earliest Document Paid Date** fields are used to prevent Commission Plan from creating commission records that have already been paid using another system. For example, entering an Earliest Document Date of 1-1-2016 will prevent Commission Plan from creating commissions for sales documents whose document date is 12-31-2015 or earlier. Entering an Earliest Document Paid Date of 1-1-2017 will prevent Commission Plan from creating commissions for fully relieved sales documents whose paid off date is 12-31-2016 or earlier.

By default, any user with access to the Commission Plan Entry window may edit any unprocessed commission records, regardless of whether the associated sales document is posted or unposted. Mark the **Restrict users able to edit commissions for posted sales documents** checkbox to control which users may edit commissions for posted sales documents. Click the **Restrict Users** expansion arrow to open the Commission Plan User Setup window.
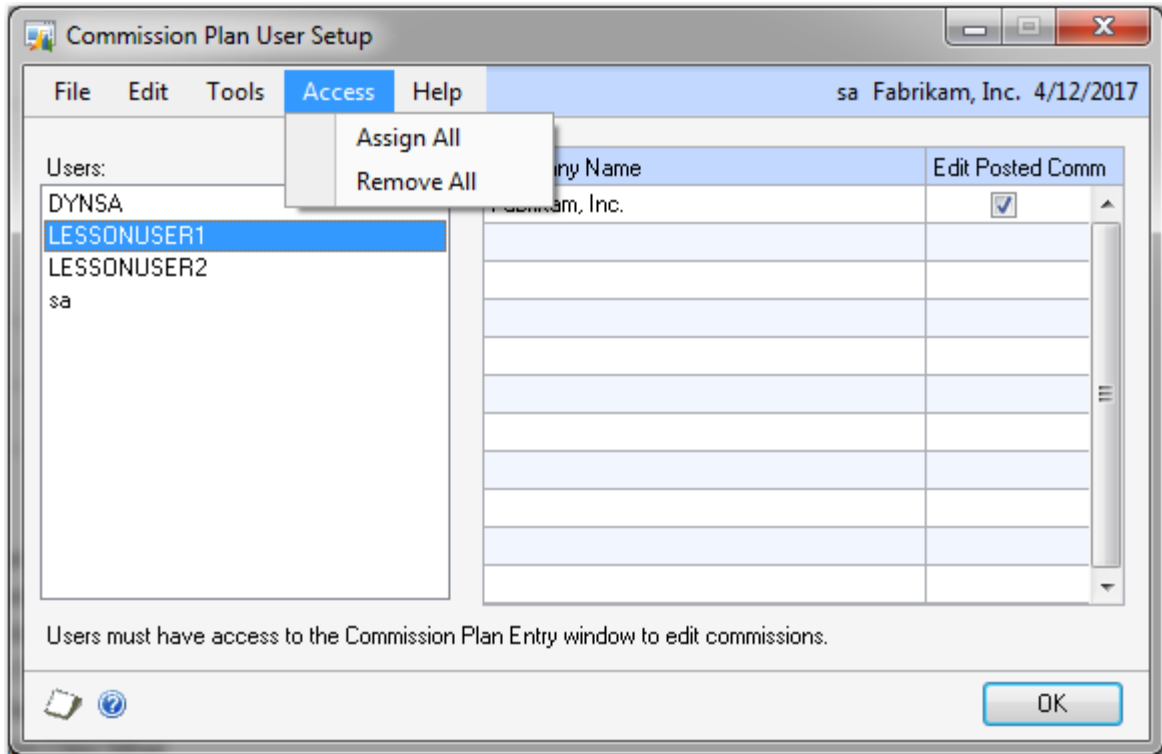
Select the users who are allowed to edit commissions for posted sales documents in each company. If a user opens the Commission Plan Entry window for a posted sales documents and that user is not allowed to edit the commissions for that document, the commission data will still be displayed but will be non-editable.

Marking the **Disable Great Plains Commissions** checkbox will disable the Microsoft Dynamics GP Commissions button on the Sales Transaction Entry and Sales Transaction Inquiry Zoom windows, and the commission percentage on all salesperson cards will be set to zero, which will prevent Microsoft Dynamics GP commission amounts from calculating. You can also use the Remove Salesperson Percentages button on the Commission Plan Utilities window to set the commission percentage to zero on all salesperson cards.

If you choose not to disable Microsoft Dynamics GP commissions, you will be prompted to choose Great Plains Commissions or EthoTech Commission Plan when clicking the Commissions button on our alternate Sales Transaction Entry and Sales Transaction Inquiry Zoom windows.

Commission Adjustment Options
Commission records not directly tied to a sales document may be created using the Commission Plan Adjustment Entry window.
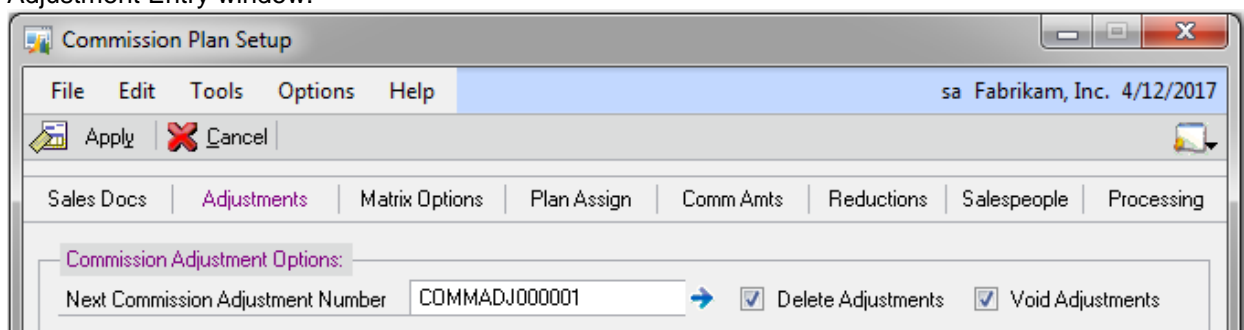
The adjustments setup is similar to the Sales Order Processing setup: enter an alpha-numeric value for the **Next Commission Adjustment Number** (document number), and select whether users can **Delete Adjustments** and/or **Void Adjustments**. *Please note that processed adjustment documents may not be deleted or voided.*

Click the **Adjustment Types** expansion arrow to open the Commission Plan Adjustment Type Setup window, which is used to create user-defined adjustment type values. When a commission adjustment is created, an adjustment type value may be assigned to the adjustment,
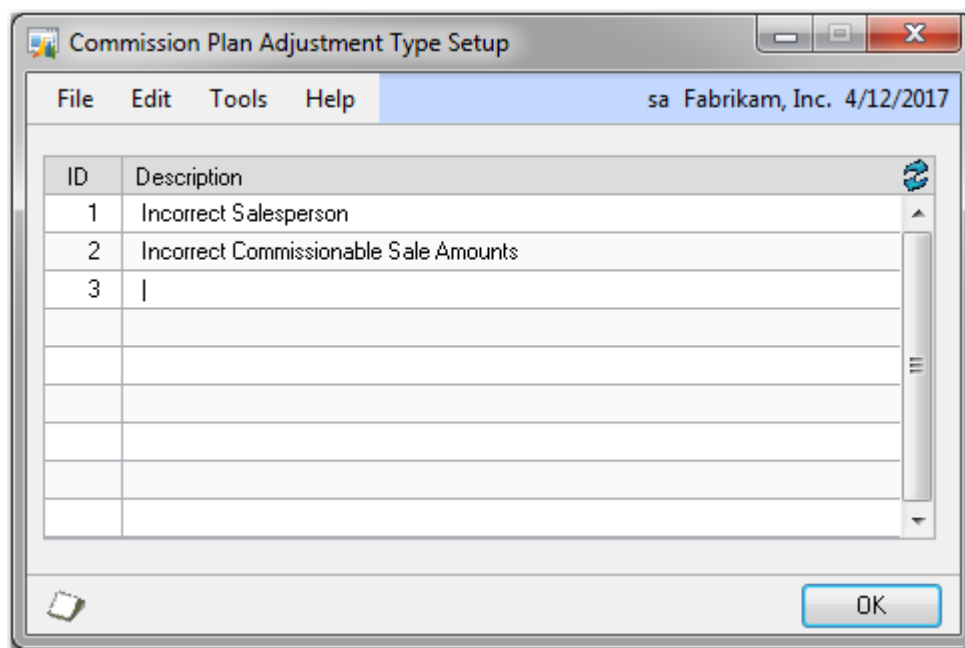
Commission Matrix Options
Selecting the **Standard** option will allow you to enter one commission rate per plan combination. Commission amounts are calculated individually for sales document lines.

Selecting the **Tiers** option will allow you to enter multiple commission rates, based on various criteria, for each plan combination. Commission amounts are calculated individually for sales document lines. Marking the **Enable Price Sheet Tiers** checkbox will allow you to set up tiers based on Extended Pricing price sheets. Entering a **Default Price Sheet for Non-inventoried Items** will allow commissions to be automatically calculated for non-inventoried sales document line items if a Default Item Plan for Non-inventoried Items has been entered.

Selecting the **Quotas** option will allow you to enter multiple commission rates, based on various criteria, for each plan combination. Commissionable sale and cost amounts are tracked for sales document lines, and aggregated based on the plan combination. Commission amounts are then calculated for the plan combination sale and cost totals.
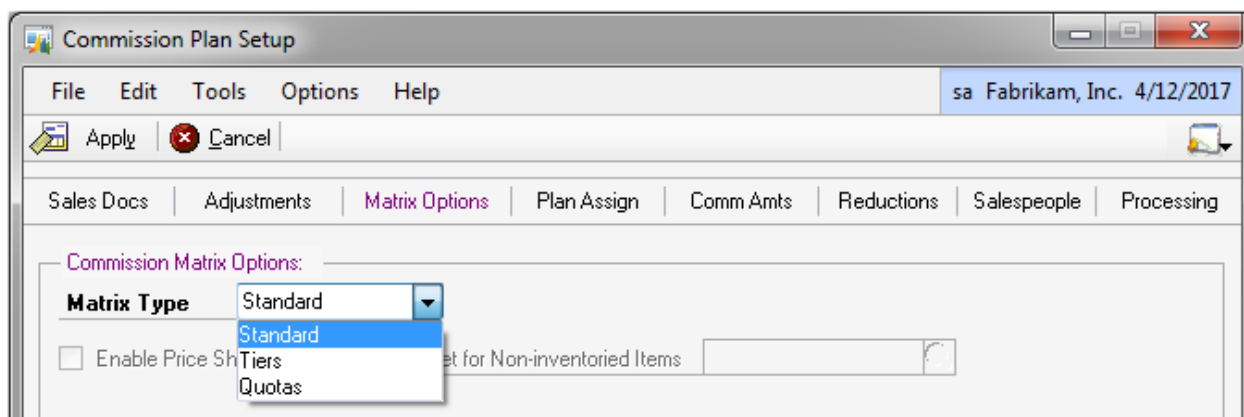
The Tiers and Quotas options are not available for clients running Commission Plan Keystone.

See the Commission Plan Matrix Setup section of this document for more information.

Commission Plan Assignments
Marking the **Require Customer Plans** checkbox will set the Customer Plan field to *Required* if you are using our alternate Customer Maintenance window or will open our Customer Commission Plan Info window when a customer is saved without a Customer Plan if you are not using our alternate Customer Maintenance window.

Marking the **Require Salesperson Plans** checkbox will set the Salesperson Plan field to *Required* if you are using our alternate Salesperson Maintenance window or will open our Salesperson Commission Plan Info window when a salesperson is saved without a Salesperson Plan if you are not using our alternate Salesperson Maintenance window.

Marking the **Require Item Plans** checkbox will set the Item Plan field to *Required* if you are using our alternate Item Maintenance window or will open our Item Commission Plan Info window when an item is saved without an Item Plan if you are not using our alternate Item Maintenance window.
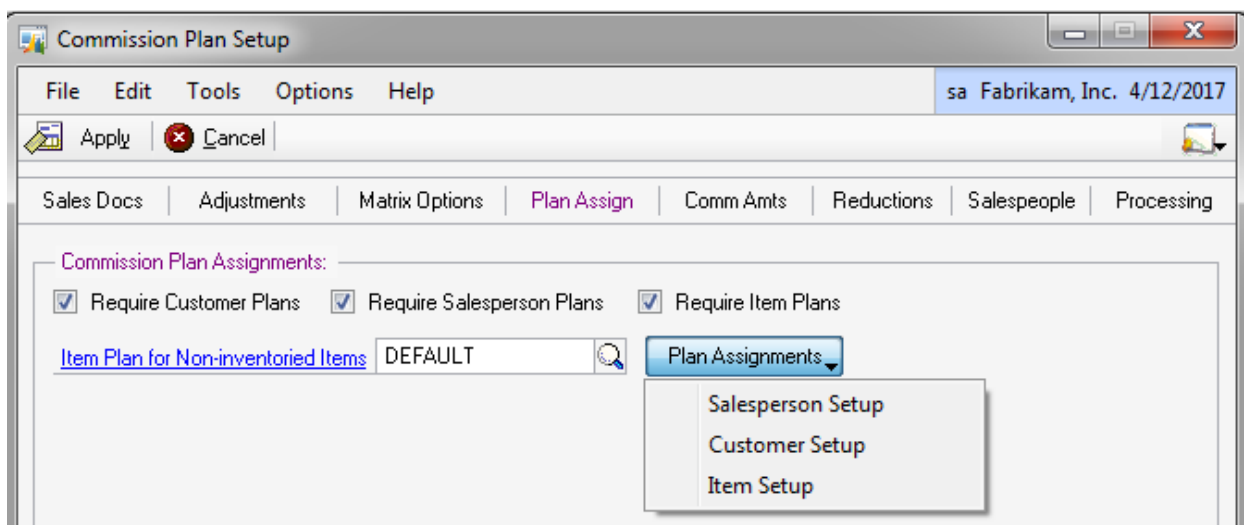
Entering a default **Item Plan for Non-inventoried Items** will allow commissions to be automatically calculated for sales document line items that do not exist in the Inventory Item Master.
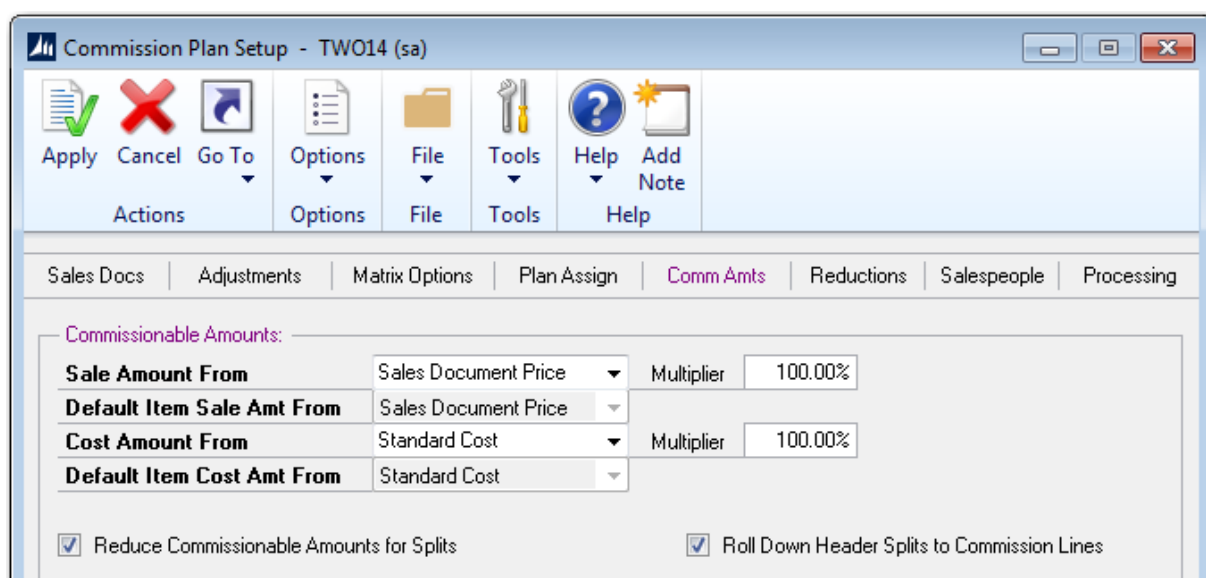
Click the **Plan Assignments** button to assign Salesperson Plans to salespeople, Customer Plans to customers, and Item Plans to items. You can also use our mass update utilities to perform these tasks. See the Mass Update section of this document for detailed information on mass update functionality.

Commissionable Amounts
The **Commissionable Sale Amount** can be derived from either the sales document line extended price (Sales Document Price) or the inventory item's list price * quantity in base unit of measure (List Price). A multiplier may be applied to the resulting amount to determine the commissionable sale amount. You may also elect to make this selection independently for each item ID.

The **Commissionable Cost Amount** can be derived from the sales document line extended cost (Sales Document Cost); the inventory item's standard cost * quantity in base unit of measure (Standard Cost); the sales document line extended price (Sales Document Price); or the inventory item's list price * quantity in base unit of measure (List Price). A multiplier may be applied to the resulting amount to determine the commissionable cost amount. You may also elect to make this selection independently for each item ID.

If the commissionable sale selection is set to Based on Item, you must set the default commissionable sale selection and multiplier. If the commissionable cost selection is set to Based on Item, you must set the default commissionable cost selection and multiplier.

If the commissionable sale or cost amount selection is set to Based on Item, you can use the Item Commission Plan Info window, the Commission Plan Item Class Setup window, or the Mass Update Items utility to set the commissionable amount source and multiplier.

When the **Reduce Commissionable Amounts for Commission Line Splits** checkbox is marked, the commissionable sale and cost amounts on commission line items are reduced by the line item Split percentage before the commission line is calculated; otherwise, the line item commissionable amounts are not affected by the line item Split percentage. Commission splits entered at the commission header (summary) level do not affect the commission line commissionable sale and cost amounts.

If the Quotas matrix option is selected, the Reduce Commissionable Amounts for Commission Line Splits option is required to be marked.

When the **Roll Down Header Splits to Commission Lines** checkbox is **marked**, a split percentage entered for a commission record in the Commission Plan Entry window will appear on all commission

lines, overriding any automatically calculated commission line split percentages. The header net commission amount will equal the header gross commission amount (the sum of all commission line net commission amounts).

When the **Roll Down Header Splits to Commission Lines** checkbox is **unmarked**, a split percentage entered for a commission record in the Commission Plan Entry window will not affect any commission lines. The header net commission amount will be calculated by multiplying the header gross commission amount (the sum of all commission line net commission amounts) by the header split percentage.

Commission Reductions
This section allows you to reduce commissions for **Terms Discounts**, **Trade Discounts**, **Write-offs, Credit Card Payments, Overdue Invoices, and Payment Terms**. The Overdue Invoices commission reduction functionality is not available for clients running Commission Plan Keystone.
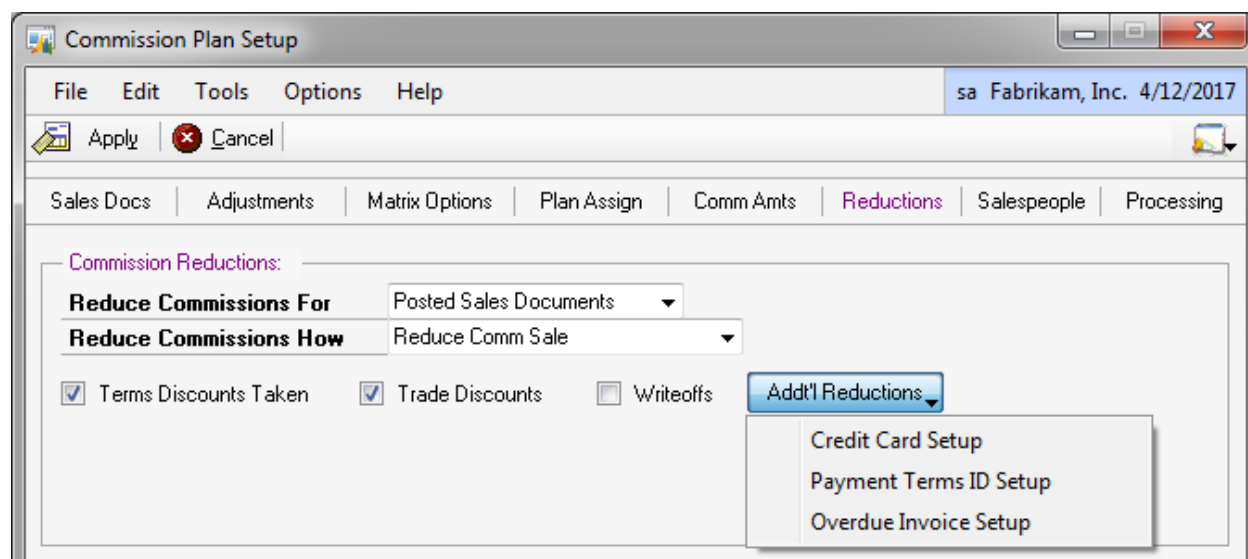
Use the **Reduce Commissions For** drop-down to designate whether commissions are reduced for all sales documents or only posted invoices and returns.

Since commissions are calculated at the line item level and discounts and write-offs are applied at the document header level, the reductions are calculated in the following manner: a commission reduction percentage is calculated by dividing the amount of the trade discount, terms discount, or write-off by the sales document subtotal (the total of the extended price of all line items), then the commissionable sale and/or cost amount of each commission line item record is reduced by the commission reduction percentage and commissions are recalculated.

The **Reduce Commissions How** drop-down is used to designate whether both the commissionable sale and cost are reduced, only the commissionable sale is reduced, only the commissionable cost is increased, or only the commissionable cost is increased as a percentage of the commissionable sale.

Example: Using the Standard matrix option, the **Reduce Comm Sale** Reduce Commissions How option, and the Reduce Commissionable Amounts for Commission Line Splits option unmarked, Bob is paid 10% of sales when he sells green phones and he receives no commission when he sells phone cords. We enter an invoice with 1 green phone selling for $10.00 and 1 phone cord selling for $2.00, totaling $12 for the invoice. Bob's commission is $1.00 ($10.00 * 0.10 for the green phone plus zero for the phone cord). We write off $3.00, so the commission reduction percentage is 25% ($3.00 / $12.00). The commissionable sale amount for the green phone changes to $7.50 ($10.00 * (1 - 0.25)) and the commissionable sale amount for the phone cord changes to $1.50 ($2.00 * (1 - 0.25)). Bob's commission is now $0.75 ($7.50 * 0.10 for the green phone plus zero for the phone cord).

Click the **Addt'l Reductions** button to open the Commission Plan Credit Card Setup, Comm Plan Overdue Setup, and Commission Plan Payment Terms Setup windows.

- The **Commission Plan Credit Card Setup** window allows you to enter commission reduction percentages for credit cards.
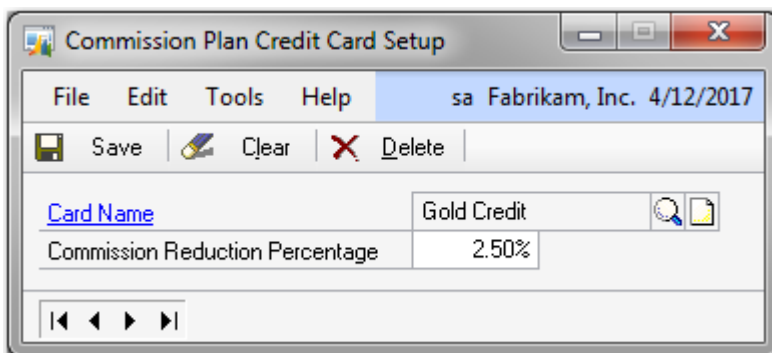
When a credit card payment is applied to a sales document, the commissionable sale and/or cost amounts of each commission line item record for the document are reduced by the credit card **Commission Reduction Percentage** and commissions are recalculated.

- The **Comm Plan Overdue Setup** window allows you to enter commission reduction percentages for overdue invoices. This functionality is not available for clients running Commission Plan Keystone.
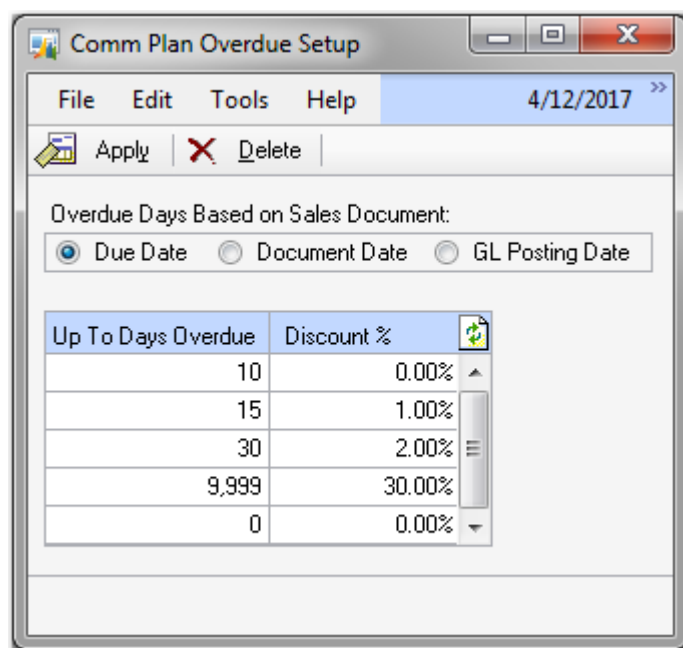
Whenever commissions are updated for a posted sales document (posting, applying payments, running Commission Plan Utilities, clicking the Update or Default buttons on the Commission Plan Entry window), Commission Plan compares the system date to the sales document's **Due Date**, **Document Date**, or **GL Posting Date** to calculate a Days Overdue value. If the Days Overdue value falls within one of the **Up To Days Overdue** ranges from the Comm Plan Overdue Setup

window, the commissionable sale and/or cost amounts of each commission line item record are reduced by the **Discount %** and commissions are recalculated. In the above example, no reductions are taken until sales documents are 11 days overdue.

- The **Commission Plan Payment Terms Setup** window allows you to enter commission reduction percentages for Payment Terms IDs.
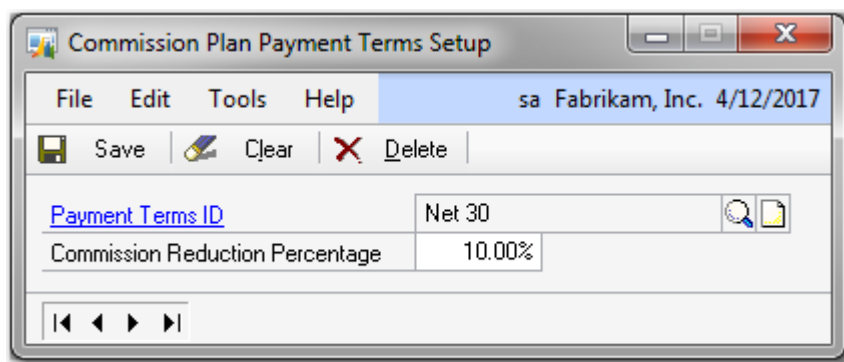
When commissions are updated, the document's payment terms ID is compared to the Commission Plan Payment Terms Setup. If a match is found, the commissionable sale and/or cost amounts of each commission line item record for the document are reduced by the payment terms ID **Commission Reduction Percentage** and commissions are recalculated.

For all commission reduction types, commissions with a Commission Type of *Flat Amount* or *Per Unit* will not be reduced as the commission rate does not depend on the sale price or cost of the item. If you modify your commission reduction settings, use the Commission Plan Utilities window to update unprocessed commission records for existing sales documents. See the Commission Plan Utilities section of this document for details.

Salespeople Receiving Commission
To enforce a sort order by Salesperson Class when calculating commissions for a sales document, mark the **Set Calculation Order By Salesperson Class** checkbox. This functionality is used when an integrating application requires commissions to be calculated in a specific order.
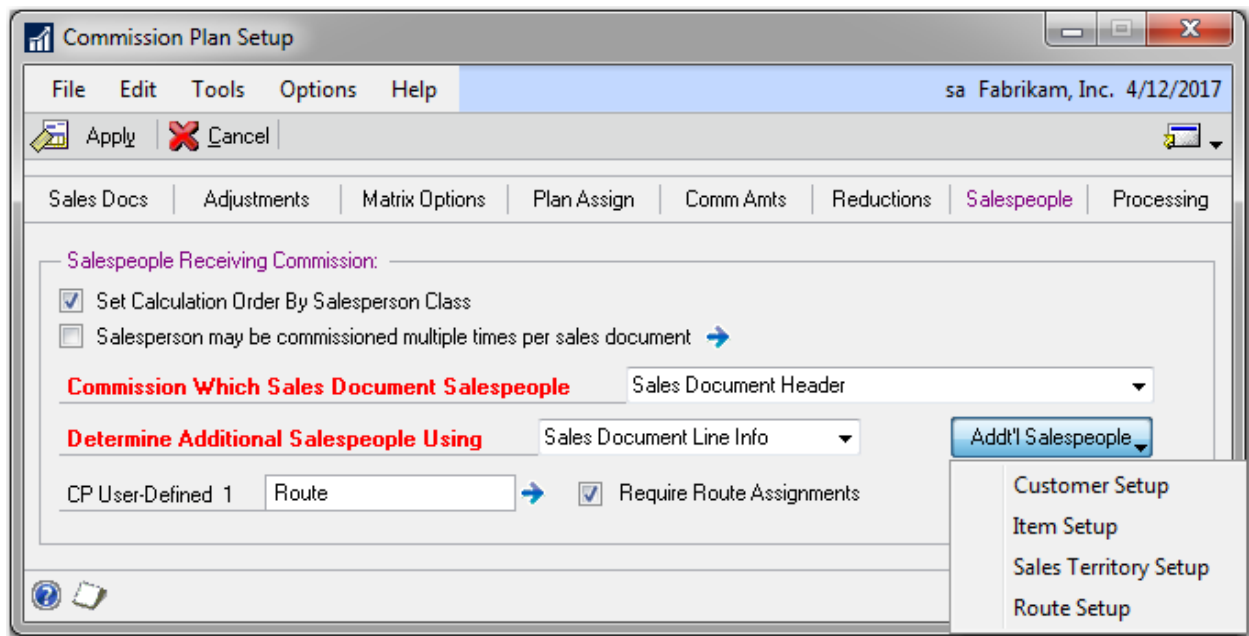
A salesperson may be eligible to receive multiple commissions for a single sales document line, or they may only be eligible to receive one commission for a line. For clients running Commission Plan Keystone, a salesperson may only receive one commission for a sales document line.

Examples: Salesperson Bob is the sales rep for a customer, so he is assigned to the customer using the Customer Maintenance window, and he defaults onto each sales document created for that customer. In addition, Bob is also the manager for sales territory US-WEST, to which the customer is assigned. Bob is assigned to the sales territory using the Sales Territory Commission Plan Info window.

If Bob should receive commissions as both the sales rep and the manager for sales documents created for the customer, then the **Salesperson may be commissioned multiple times per sales document** checkbox should be marked.

If Bob should be commissioned either as the sales rep or the manager for sales documents created for the customer, then the **Salesperson may be commissioned multiple times per sales document** checkbox should be unmarked. You'll also need to click the **Salesperson From Rankings** expansion arrow to open the Commission Plan Salesperson From Ranking Setup window.
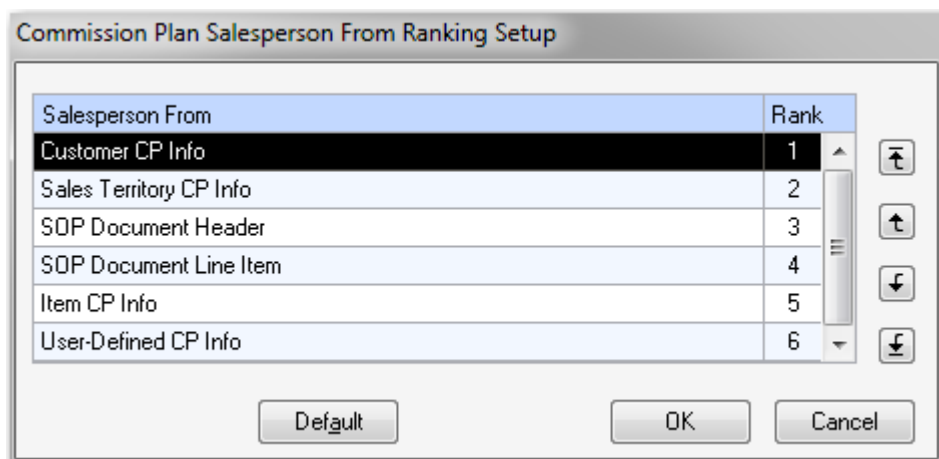
When the **Salesperson may be commissioned multiple times per sales document** checkbox is unmarked and a salesperson is assigned on multiple setup windows, his commission will be based on the **Salesperson From** entry with the lowest **Rank** value.

If Bob should receive commission as the sales rep rather than the manager, make sure that the Sales Territory CP Info entry appears below the SOP Document Header and SOP Document Line Item entries. If Bob should receive commissions as the manager rather than the sales rep, make sure that the Sales Territory CP Info entry appears above the SOP Document Header and SOP Document Line Item entries.

The **Commission Which Sales Document Salespeople** drop-down has four choices:
- *Sales Document Header*
- *Sales Document Line*
- *Sales Document Header & Line*
- *Do Not Commission Any Sales Document Salespeople*

When the **Sales Document Header** option is selected, the salesperson displayed in the Sales Customer Detail Entry window will be commissioned for all line items on the sales document.

When the **Sales Document Line** option is selected, the salesperson displayed in the Sales Item Detail Entry window will be commissioned only for that line item.

When the **Sales Document Header & Line** option is selected, the salesperson displayed in the Sales Customer Detail Entry window will be commissioned for all line items on the sales document, and the salesperson displayed in the Sales Item Detail Entry window will be commissioned only for that line item. This option requires the Salesperson may be commissioned multiple times per sales document checkbox to be marked, and is not available for clients running Commission Plan Keystone.

When the **Do Not Commission Any Sales Document Salespeople** option is selected, no salespeople appearing on the sales document will be commissioned. Salespeople assigned to the other Commission Plan windows that are displayed in the Commission Plan Salesperson From Ranking Setup window will be commissioned.

The **Determine Additional Salespeople Using** drop-down has two choices:
- *Sales Document Header Info*
- *Sales Document Line Info*

When the **Sales Document Header Info** option is selected, sales header info (ship to address, sales territory, etc) will be used when commissioning salespeople assigned to the Commission Plan windows that are displayed in the Commission Plan Salesperson From Ranking Setup window. All splits will take place at the commission header level. This means that the commission line commissionable sale and cost amounts will only be automatically modified for splits if both the Reduce Commissionable Amounts for Commission Line Splits and Roll Down Header Splits to Commission Lines checkboxes are marked in the Commissionable Amounts section of the setup.

When the **Sales Document Line Info** option is selected, sales line info (ship to address, sales territory, etc) will be used when commissioning salespeople assigned to the Commission Plan windows that are displayed in the Commission Plan Salesperson From Ranking Setup window. All splits will take place at the commission line level. This means that the commission line commissionable sale and cost amounts will only be automatically modified for splits if the Reduce Commissionable Amounts for Commission Line Splits checkbox is marked in the Commissionable Amounts section of the setup.

If the Quotas matrix option is selected, the Sales Document Line Info option is required to be marked.

Commission Plan includes functionality to assign salespeople to groupings of customers that are not completely described by sales territories. For example, delivery routes are typically subsets of sales territories. This functionality is implemented through the **CP User-Defined 1** setup. The default label for

the CP User-Defined 1 field is *CP User Def 1*. Enter the appropriate label for your installation (*Route*, for example). Marking the **Require CP User Def 1 Assignments** checkbox will require a CP User-Defined 1 value to be entered when creating or updating a customer record in the Customer Maintenance or Customer Commission Plan Info windows. Click the **Edit User-Defined Values** expansion arrow to open the Commission Plan User-Defined Setup window.
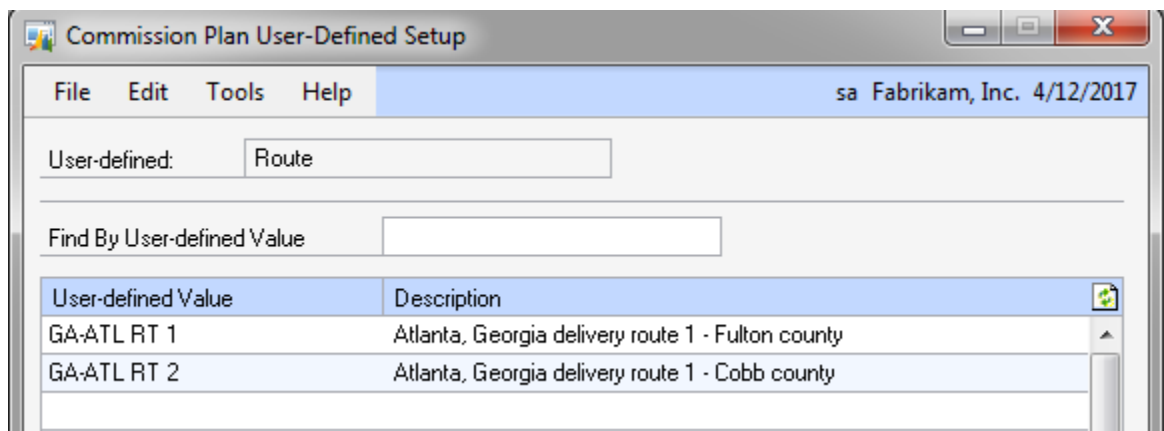
The CP User-Defined 1 label (*Route* in our example), will be displayed. Enter the desired values and descriptions.

Click the **Addt'l Salespeople** button to assign additional salespeople to customers, sales territories, customer user defined values, and inventory items. Clients running Commission Plan Keystone may create User-Defined values and assign these values to customers, but they may not assign salespeople to these values. See the Customer Commission Plan Info, Sales Territory Commission Plan Info, User-Defined 1 Commission Plan Info, and Item Commission Plan Info sections of this document for details.

See the Determining the Salespeople for a Sales Document section of this document for detailed information on how salespeople are commissioned for a particular sales document.

Commission Processing
To distinguish the payment of commissions from the payment of sales documents, Commission Plan refers to commission payment as Commission Processing.

The **Commission Recognition Date From** selection determines which date will be entered in the Commission Recognition Date field for each commission record. The drop-down list has four choices:

- *Sales Transaction Originating Order Date* - if the current sales transaction was transferred from a sales order, then the Commission Recognition Date will be set to the order; otherwise the Commission Recognition Date will be set to the current sales transaction document date.

- *Sales Transaction Document Date* - the Commission Recognition Date will be set to the current sales transaction document date.

- *Sales Transaction GL Posting Date* - the Commission Recognition Date will be set to the sales transaction general ledger posting date - this date will be blank for unposted transactions.

- *Sales Transaction Paid Date* - the Commission Recognition Date will be set to the date a sales invoice is fully relieved or the date a sales return is fully applied - this date will be blank for unposted or unrelieved / unapplied transactions.

The Commission Recognition Date From is used in 2 cases:

- To determine the commission rate when using the Tiers matrix option with the Commission Recognition Date tier type.
- To determine the commission period when using the Quotas matrix option.

The **Enable Commission Processing When** drop-down list has three choices:

- *Document is Posted* - commissions are due to salespeople as soon as sales documents are posted.

- *Document is Paid* - commissions are due when sales invoices are fully relieved and when sales returns are either posted or fully relieved, depending on the Returns Considered Paid When

option selected. Invoices and returns are deemed fully relieved when the amount remaining, as displayed in Receivables Transaction Inquiry – Customer, is $0.00.

- *Based on Salesperson* - the choice to process commissions when sales documents are posted or fully relieved is made per salesperson rather than company-wide, and you must set the default processing option. Use the alternate Salesperson Maintenance window, the Commission Plan Salesperson Class Setup window, or the Salesperson Commission Plan Info window to select whether a salesperson will be paid when sales documents are posted or fully relieved. If you choose Based on Salesperson in the Commission Plan Setup window and do not set a processing method for a salesperson, the salesperson will be assigned the Invoice is Posted method when commissions are processed.

⚠ *Note: Commission Plan doesn't support the partial payment of commissions for partially relieved documents. Microsoft Dynamics GP doesn't allow payments to be applied at the line item level, preventing Commission Plan from determining which commission lines should be processed.*

The **Returns Considered Paid When** option has two choices:

- *Fully Applied* - commissions are due when sales returns are posted and fully applied. This option is not available if Enable Commission Processing When is set to *Document is Posted.*

- *Posted* - commissions are due to salespeople as soon as sales returns are posted.

⚠ *Note: when determining the Date Document Paid for commissions associated with a return and Commission Plan is configured to enable commission processing for paid invoices and posted returns, the Date Document Paid is set to the return's GL Posting Date. This allows the use of only a Date Document Paid range when processing commissions.*

The **Next Commission Processing Run ID** is used when commissions are processed. The function of this number is similar to that of a batch number in that all commission records processed in a given run are assigned the same Run ID. The Run ID can then be used to filter commission inquiries and reports.

⚠ *Note: If Commission Plan was in use before the Processing Run ID functionality was added, summary information is created and a Commission Processing Run ID is assigned for each existing processing run when a Next Commission Processing Run ID is saved in the Commission Plan Setup window for the first time.*

The **Next Commission Accrual Run ID** is used when commissions are accrued, and functions like the Commission Processing Run ID. This field is required only when the **Create Accrual Trx** option is marked. See the Accruing Commissions section of this document for detailed information on how commissions may be accrued.

The **Create GL Trx**, **Create Payables Trx**, and **Create Payroll Trx** options determine which, if any, Microsoft Dynamics GP transactions should be created when commissions are processed. If none of these options are marked, Commission Plan may still be used as a reporting tool for outside accounts payable or payroll services.

Commission Plan Matrix Setup
Sales Area Page >> Setup >> Commission Plan >> Commission Plan Matrix Setup

The Commission Plan Matrix Setup window is used to define the Commission Plan Matrix and the completion of this window requires that the rules by which commissions will be paid have been determined. It is usually desirable to complete this window after all salespeople have been assigned to

Salesperson Plans, all customers have been assigned to Customer Plans, and all items have been assigned to Item Plans. Since it is very difficult to display a three-dimensional matrix within a Microsoft Dynamics GP window, Commission Plan presents a single layer at a time, with each layer represented by the Salesperson Plan. The commission rate to be paid to each salesperson commissioned using to the current Salesperson Plan is determined by the Customer Plan and Item Plan combinations in the scrolling window. If no match is found in the matrix, then a $0.00 commission with a commission type of No Commission is calculated for the sales document line item in question.

The **View By** field is used for complex plans. This is a display only control for the scrolling window and does not alter the data in any way. You may select to view the matrix line items in Customer Plan order or Item Plan order and you may view a subset of the data by setting a range.

The Commission Plan Matrix uses the Salesperson Plan, Customer Plan, and Item Plan to determine the appropriate commission rate for an individual line item in Sales Order Processing.

The appearance and functionality of the Commission Plan Matrix Setup window is determined by the Commission Matrix Options on the Commission Plan Setup window.

Standard Matrix Option
A single commission rate can be assigned to a given plan combination.

When a **Salesperson Plan** is displayed, the **Default Commission Type** and **Rate** are set to the default commission type and rate entered in the Salesperson Commission Plan Setup window for the salesperson plan. The default commission type and rate may be edited.

If the **Inactive** checkbox is marked for the displayed salesperson plan, the matrix may not be modified for that plan.

When a new **Customer Plan** – **Item Plan** combination is entered, the **Type** and **Commission Rate** are set to the default commission type and rate.

The **Type** drop-down list lets you select the type of commission to be paid. The types and their definitions are:

- *No Commission* - no commissions will be paid.

- *Margin* - the commission paid is a percentage of the Commissionable Sale Amount less the Commissionable Cost Amount.

- *Sale* - the commission paid is a percentage of the Commissionable Sale Amount.

- *Flat Amount* - the commission paid is an amount, such as $5.00, for the item regardless of price, cost, or quantity.

- *Per Selling Unit* - the commission paid is an amount multiplied by the sales document line item Quantity and does not take Unit of Measure into account. For example if you entered a quantity of 3 and a U of M of Case or Each, the commission would be the same.

- *Per Base Unit* - the commission paid is an amount multiplied by the sales document line item Quantity in Base Unit of Measure.

Commission Plan uses Commissionable Sale and Cost amounts for the purposes of calculating commissions for types of Margin and Sale. The Commissionable Sale Amount can be derived from the sales document line item extended price or the inventory item's list price. The Commissionable Cost Amount can be derived from the sales document line item extended cost or extended price or the inventory item's standard cost or list price. Both the Commissionable Sale and Cost amounts can be overridden by the user.

The **Percent (%)** field allows you to enter a percentage between 0.00% and 327.67% for the Commission Rate to be paid and is used only with Sale and Margin commission types.

The **Amount** field allows you to enter an amount between $0.00 and $99,999,999,999.99 and is used only with Flat Amount, Per Selling Unit, and Per Base Unit commission types.

Example: in the above screenshot, a salesperson paid using Salesperson Plan SALES REP would receive a commission of 15% of the selling price on a line item assigned to Item Plan HARDWARE sold to a customer assigned to Customer Plan RETAIL. However, that same salesperson would receive no commission on a line item assigned to Item Plan NO COMMISSION sold to a customer assigned to Customer Plan RETAIL, as the commission type for this plan combination is No Commission. The salesperson would receive no commission on a line item assigned to Item Plan SOFTWARE sold to a customer assigned to Customer Plan WHOLESALE, as no combination of Salesperson Plan SALES REP, Customer Plan WHOLESALE, and Item Plan SOFTWARE exists in the matrix.

The **Create Entries for all Plan Combinations** options menu allows you to create entries for all customer plan – item plan combinations that do not already exist for the displayed salesperson plan, using the default commission type and rate. Entries will not be created for inactive customer or item plans.

Tiers Matrix Option (not available for Commission Plan Keystone clients)

Multiple commission rates may be assigned to a given Plan combination, allowing for "sliding scales" or "groupings" of commission rates based on one of several Tier Types: commissionable sale amount,

margin amount, margin percent, price level, quantity in base unit of measure, unit price, unit price from commissionable sale amount, unit price from extended price, Commission Recognition Date, Site ID, and list price percent. These scales apply only to the current sales document line item, and commission rates are inclusive rather than additive (once a rate level is achieved, the associated commission rate is applied to the entire line item).

The **Create Entries for all Plan Combinations** options menu allows you to create entries for all customer plan – item plan combinations that do not already exist for the displayed salesperson plan. Entries will not be created for inactive customer or item plans.

Tier Schedules

A Salesperson Plan, Customer Plan, and Item Plan combination can have a tier schedule assigned by one of the following methods:

- The default tier schedule, by marking the **Use Default Tiers** checkbox. In this case, clicking the **Edit Tiers** expansion button will open the Commission Plan Default Tiers window. Editing this window modifies the tier structure for all plan combinations using the default tier schedule.

- A tier schedule created specifically for the selected plan combination. In this case, clicking the **Edit Tiers** expansion button will open the Commission Plan Tiers window. Editing this window modifies the tier structure only for the selected plan combination.

- A tier schedule created for each inventory item assigned to the selected Item Plan, by marking the **Use Item Tiers** checkbox. In this case, you will need to click the **Edit Tiers** expansion button (arrow next to the Item Plan lookup button) on the Item Commission Plan Info window – or our alternate Item Maintenance window – to open the Commission Plan Item Tiers window. Editing this window modifies the tier structure only for the selected inventory item.

Tier Types

For any tier schedule, commission types and rates may be assigned to ranges of any of the following tier types:

- *Commissionable Sales Amount* – rate determined by the Commissionable Sale Amount.

- *Commissionable Recognition Date* – rate determined by the Commissionable Recognition Date.

- *List Price Percent* – rate determined by the List Price Percent: (Selling Price/List Price)*100, where the Selling Price = Extended Price / Selling Quantity in Base Unit of Measure.

- *List Price Percent from Comm Sale Amt* – rate determined by the List Price Percent: (Comm Unit Sale Amt/Comm List Price)*100, where the Comm Unit Sale Amt = Commissionable Sale Amount / Selling Quantity in Base Unit of Measure and the Comm List Price = List Price * Commission Line Split %.

- *Margin Amount* – rate determined by the Margin: Commissionable Sale Amount - Commissionable Cost Amount.

- *Margin Percent* – rate determined by the Margin Percent: ((Commissionable Sale Amount - Commissionable Cost Amount)/Commissionable Sale Amount)*100.

- *Price Sheet* / *Price Level* – if Microsoft Dynamics GP Extended Pricing is in use, rate determined by the Price Sheet assigned to the sales document line item(s); otherwise, rate determined by the Price Level assigned to the sales document line item(s).

- *Quantity in Base U of M* – rate determined by the Quantity in the item's base Unit of Measure.

- *Site ID* – rate determined by the Site ID.

- *Unit Price* – rate determined by the Unit Price.

- *Unit Price from Commissionable Sale Amount* – rate determined by the Unit Price from Commissionable Sale Amount: Commissionable Sale Amount/QTY [the actual line item quantity, not QTY in Base U of M]. The Commissionable Sale Amount may be affected by Markdowns, Trade and Terms Discounts, Write-offs, Splits, Multipliers and manual adjustments.

- *Unit Price from Extended Sale Amount* – rate determined by the Unit Price from Extended Price: Extended Price/QTY [the actual line item quantity, not QTY in Base U of M]. This method allows the Unit Price to be affected by Markdowns.

Commission Types

For a given tier range, any of the following commission types may be assigned:

- *No Commission* – no commissions will be paid.

- *Margin* – the commission paid is a percentage of the Commissionable Sale Amount less the Commissionable Cost Amount.

- *Sale* – the commission paid is a percentage of the Commissionable Sale Amount.

- *Flat Amount* – the commission paid is an amount, such as $5.00, for the item regardless of price, cost, or quantity.

- *Per Selling Unit* – the commission paid is an amount multiplied by the sales document line item Quantity and does not take Unit of Measure into account. For example if you entered a quantity of 3 and a U of M of Case or Each, the commission would be the same.

- *Per Base Unit* – the commission paid is an amount multiplied by the sales document line item Quantity in Base Unit of Measure.

> *Commission Plan uses Commissionable Sale and Cost amounts for the purposes of calculating commissions for types of Margin and Sale. The Commissionable Sale Amount can be derived from the sales document line item extended price or the inventory item's list price. The Commissionable Cost Amount can be derived from the sales document line item extended cost or extended price or the inventory item's standard cost or list price. Both the Commissionable Sale and Cost amounts can be overridden by the user.*

Commission Rates

The **Percent (%)** field allows you to enter a percentage between 0.00% and 327.67% for the Commission Rate to be paid and is used only with Sale and Margin commission types.

The **Amount** field allows you to enter an amount between $0.00 and $99,999,999,999.99 and is used only with Flat Amount, Per Selling Unit, and Per Base Unit commission types.

Default Tiers
Sales Area Page >> Setup >> Commission Plan >> Commission Plan Default Tiers

Creating a default tier schedule is beneficial if your commission structure doesn't discriminate by salesperson, customer, or inventory item (Margin Percent and Price Level/Price Sheet are commonly used for default tiers); otherwise it will probably be more efficient to assign tiers to individual plan combinations or inventory items.

The tier schedule entered in this window will be used whenever the Use Default Tiers checkbox is marked for a particular plan combination in the Commission Plan Matrix Setup window.

Example: In the above screenshot, if the line item margin percentage is between 0% and 5%, a zero dollar commission would be calculated. If the line item margin percentage is above 10%, a commission of $100.00 would be calculated.

Plan Tiers
Sales Area Page >> Setup >> Commission Plan >> Commission Plan Matrix Setup >> Edit Tiers

The Commission Plan Tiers window is used to create a tier schedule for a particular plan combination, and the window is accessed by clicking the **Edit Tiers** expansion button for a plan combination in the Commission Plan Matrix Setup window.

The tier schedule entered in this window will be used for the associated plan combination as long as neither the Use Default Tiers nor the Use Item Tiers checkbox is marked for that plan combination in the Commission Plan Matrix Setup window.

Example: In the above screenshot, if the line item commissionable sale amount $5.00 or less, a zero dollar commission would be calculated. If the commissionable sale amount is greater than $10.00 and not greater than $20.00, a commission of 4% of the line item commissionable sale amount would be calculated.

Item Tiers
Sales Area Page >> Cards >> Commission Plan >> Item Commission Plan Info >> Item Tiers Expansion

The Commission Plan Item Tiers window is used to create a tier schedule for a particular inventory item, and the window is accessed by either of the following methods:
- Clicking the **Edit Tiers** expansion button (arrow next to the Item Plan lookup button) in the Item Commission Plan Info window for a particular inventory item
- Clicking the **Edit Tiers** expansion button (arrow next to the Item Plan lookup button) in our alternate Item Maintenance window for a particular inventory item

The tier schedule entered in this window will be used for any plan combination that contains the inventory item's Item Plan if the **Use Item Tiers** checkbox is marked for that plan combination in the Commission Plan Matrix Setup window.

Example: In the above screenshot, if the derived line item unit price is greater than $3.00 and not greater than $18.00, a commission of $2.00 would be calculated. If the derived line item unit price is greater than $100.00, a commission of .02% of the line item commissionable sale amount would be calculated.

Quotas Matrix Option (not available for [Commission Plan Keystone](#) clients)
Choosing Commission Plan allows you define quota levels per plan combination. The quota levels are assigned per period for the plan combination and year. Examples of period setups are Annual, Quarter, and Month. The quota levels may be tracked by Commissionable Sale Amount or Margin Amount, and the commission calculation method may be stepped (from $0 - $100 pay 2%, from $100.01 and up pay 3%, so if commissionable amount is $150.00 pay 2% of $100.00 + 3% of $50.00) or inclusive (entire commission is paid based on the highest quota level achieved [from $0 - $100.00 pay 2%, from $100.01 and up pay 3%, so if commissionable amount is $150.00 pay 3% of $150.00).

Commission Plan Quota Periods Setup
Sales Area Page >> Setup >> Commission Plan >> Commission Plan Quota Period Setup

Before quotas setups can be created for your plan combinations, quota periods must be created using the Commission Plan Quota Period Setup window.

This window allows you to create up to 5 quota period setups per year, one for each of the following **Period Type** options:
- User-defined
- Annual
- Semiannual
- Quarter
- Month

When you choose a **Year**, the **First Day** and **Last Day** are defaulted from your Dynamics GP fiscal year setup, but these dates may be overridden. When a Period Type of Annual, Semiannual, Quarter, or Month is selected, the **Number of Periods** is defaulted, but it may be overridden. When a Period Type of User-defined is selected, it's up to you to enter the Number of Periods. Once you're satisfied with the First Day, Last Day, and Number of Periods; click the **Calculate** button to create the periods. Once the periods have been created, the **Period Names** and Start Dates can be modified. A period setup may be modified or deleted until it has been assigned to a plan combination.

Once your quota periods have been created, click the **Edit Quotas** expansion arrow on the Commission Plan Matrix window to create quota setups for each plan combination.

A plan combination may be edited or deleted until commissions have been processed for the plan combination.

The **Create Entries for all Plan Combinations** options menu allows you to create entries for all customer plan – item plan combinations that do not already exist for the displayed salesperson plan, using the default commission type and rate. Entries will not be created for inactive customer or item plans.

Commission Plan Quotas
(Sales Area Page >> Setup >> Commission Plan >> Commission Plan Matrix Setup >> Edit Quotas expansion button)

Use this window to create or modify quota setups for plan combinations. A quota setup may be edited or deleted until commissions have been processed for the setup.

For each **Year**, select the appropriate Quota Type, Calculation Method, Period Type, and Commission Type.

Quota Type

- *Commissionable Sale Amount* - quota levels will be created for ranges of commissionable sale amounts.

- *Margin Amount* - quota levels will be created for ranges of commissionable margin amounts.

Calculation Method

- *Stepped* - a commission will be calculated independently for each quota level, then summed to achieve total commission amount.

- *Inclusive* - the entire commission will be calculated using the rate from the highest quota level achieved.

Comm Type

Enter the appropriate default commission type:

- If the Quota Type is Commissionable Sale Amount:
  - And the Calculation Method is **Stepped**, the Commission Type may not be set to Margin; however, Sale, Flat Amount and No Commission are available..
  - And the Calculation Method is **Inclusive**; the Commission Type must be set to Sale.
- If the Quota Type is Margin Amount:
  - And the Calculation Method is **Stepped**, the Commission Type may not be set to Sale; however, Margin, Flat Amount and No Commission are available..
  - And the Calculation Method is **Inclusive**; the Commission Type must be set to Margin.

Period Type

Select the appropriate period type (created in the Commission Plan Quota Periods Setup window). The period list will be displayed.

Quota Levels

Select a period from the list – the quota level scrolling window becomes active. Enter the desired quota levels (Ranges may not overlap):

- If the Quota Type is Commissionable Sale Amount:
  - And the Calculation Method is **Stepped**, the Commission Type may not be set to Margin; however, Sale, Flat Amount and No Commission are available..
  - And the Calculation Method is **Inclusive**; the Commission Type must be set to Sale.

- If the Quota Type is Margin Amount:
  - And the Calculation Method is **Stepped**, the Commission Type may not be set to Sale; however, Margin, Flat Amount and No Commission are available..
  - And the Calculation Method is **Inclusive**; the Commission Type must be set to Margin.

If the Calculation Method is Inclusive:

- If you set the Commission Type to No Commission, using a From value of zero dollars creates an exclusion, so that amounts up to and including the To value of the range are never commissionable.

- If you do not set the Commission Type to No Commission, using a From value of zero dollars and a rate of 0% creates a threshold, so that that amounts up to and including the To value of the range are only commissionable once the salesperson's commissionable sale or margin amount for the period exceeds the To value of the range.

Examples:

Let's say we have 3 quota levels for our period, the salesperson has accumulated $150.00 in commissionable sales for the period, and the commission is based on the accumulated commissionable sale amount.

Quota Level	Commission Type	Commission Rate
$0.00 - $50.00	No Commission (Ex. 1 & 3) / Sale (Ex. 2 & 4)	0%
$50.01 - $100.00	Sale	2%
$100.01 and up	Sale	3%

Example 1: Calculation Method is Stepped
The salesperson's commission amount is $2.50 [(50.00 * .00) + (50.00 * .02) + (50.00 * .03)].

Example 2: Calculation Method is Stepped
The salesperson's commission amount is $2.50 [(50.00 * .00) + (50.00 * .02) + (50.00 * .03)].

Example 3: Calculation Method is Inclusive
The salesperson's commission amount is $3.00 [100.00 * .03]. In this example, the $50.00 quota level is an exclusion, so no commission is paid until the salesperson exceeds the quota level, at which time commission is paid on all sales greater than $50.00 (the total sale amount is used to determine maximum quota level achieved).

Example 4: Calculation Method is Inclusive
The salesperson's commission amount is $4.50 [150.00 * .03]. In this example, the $50.00 quota level is a threshold, so no commission is paid until the salesperson exceeds the quota level, at which time commission is paid on all sales.

When the Quotas matrix option is selected, the Reduce Commissionable Amounts for Commission Line Splits checkbox is marked and locked. The Determine Additional Salespeople Using option is set to Line Item Info and locked. The Create Accruals checkbox is unmarked and locked.

Commission Plan Rate Override Setup
Commission Plan Setup window >> Go To button > Commission Rate Override Setup

If the Commission Matrix Option is set to Standard or Tiers, the Commission Plan Rate Override Setup window can be used to override the commission rate that would normally be calculated for a commission line, based on the combination of the salesperson plan, customer plan, and item plan.

This functionality is not available for Commission Plan Keystone clients.

Enter an **Override ID** and **Description**. Enter a **Start Date** for the override. You can either leave the date range open-ended, or you can enter an **End Date**. You can create multiple date ranges for an Override ID, but the ranges cannot overlap. If you leave the date range open-ended and then attempt to close the range at some point in the future, the earliest End Date that you'll be allowed to enter is the latest Document Date of all commission documents that have utilized the Override ID and date range to override a commission rate.

The **View By** field is used for complex scenarios. This is a display only control for the **Rates List** scrolling window and does not alter the data in any way. You may select to view the commission rate overrides in Salesperson ID, Customer ID, or Item Number order and you may view a subset of the data by setting a range.

If the **Include Inactive Salespeople** checkbox is unmarked, you will not be allowed to enter an inactive salesperson in the Rates List. Likewise for inactive customers and inactive items.

Changes made to a Date Range, including Rate List edits, do not take effect until the Date Range is saved.

If you enter a **Default Commission Type** and **Rate**, those values will be used when you insert new commission rate overrides in the Rates List.

Commission Plan interprets a commission rate override with a blank **Salesperson ID** as "any salesperson", a blank **Customer ID** as "any customer" and a blank **Item Number** as "any item". In the above screenshot, when item 100XLG is sold to any customer by any salesperson on a sales document whose document date falls on or after 1-1-2017, the commission rate will be 1% (unless that item is sold to customer AARONFIT0001 by salesperson NANCY B., in which case the commission rate will be 2%).

The **Clear** button has 3 options:
1. Override ID – clears all data from the window.

2. Date Range - clears all data for the displayed Start Date, including the Rates List.

3. Commission Rates - clears the Rates list, based on any criteria selected in the View By option.

The **Delete** button has 2 options:
1. Override ID - deletes all data for the Override ID, including all Date Ranges and all Rate lists.

2. Date Range - deletes all data for the displayed Start Date, including the Rates list.

Delete functionality affects the permanent setups.

The **Copy** button has 2 options:
1. Override ID – used to copy one or more Date Ranges (including associated Rate Lists) from an existing Override ID to a new Override ID. A new Override ID (one for which no Date Ranges have been created) must be displayed.

2. Date Range – used to copy a Rate List from an existing Date Range to a new Date Range for an Override ID. An existing Override ID must be displayed, and a new Date Range (one for which no Rate list has been created

When you choose the Copy >> Override ID option, the **Commission Plan Rate Override Copy** window opens, with the **Copy To Override ID** set to the new Override ID from the Commission Plan Rate Override Setup window:

When you select a **Copy From Override ID**, the **Date Range List** is populated.

When you choose the Copy >> Date Range option, the **Commission Plan Rate Override Copy** window opens, with the **Copy To Override ID** and the **Copy From Override ID** set to the Override ID

from the Commission Plan Rate Override Setup window, the **Start Date** set to the new Override ID from the Commission Plan Rate Override Setup window, and the **Date Range List** populated:

If you chose the Copy >> Override ID option, you must mark at least one Date Range to be copied; if you chose the Copy >> Date Range option, you must mark exactly one Date Range to be copied.

Mark the Date Range(s) that should be copied, and click the **Copy** button. The Commission Plan Rate Override Copy window will close, and the latest Start Date and Rate List for the new Override ID (Copy >> Override ID option) or the new Rate List for the new Start Date (Copy >> Date Range option) will be displayed in the Commission Plan Rate Override Setup window.

Copy functionality affects the permanent setups

The Mass Insert Rates functionality allows you to enter multiple rows into the Rates List for a displayed Override ID and Date Range. Click the **Mass Insert Rates** button to open the Commission Plan Rate Override Mass Insert window:

Commission Type and **Rate** are required, and they default from the Commission Plan Rate Override Setup window.

The **Range Type** has 3 options:
1. Salesperson
2. Customer
3. Item

For each Range Type, there are 3 **Range** options:
1. ID
2. Class
3. Plan

The **Include Inactive**… checkbox reflects the selected Range Type, and defaults from the Commission Plan Rate Override Setup window.

You can enter a range for each Range option, so you can have up to 3 simultaneous range restrictions for the selected Range Type. When you're satisfied with the range restrictions, click the **Update…List** button (the button text changes to reflect the selected Range Type), and the records that meet the range restrictions are inserted into the corresponding list. This addition is additive, meaning that existing entries in the list won't be removed. Entries may also be manually added to and removed from each list.

The **Clear** button has 4 options:
1. All Lists
2. Salesperson List
3. Customer List
4. Item List

Selecting one of these options clears the entries from the corresponding list(s).

When you're satisfied with the entries in each list (at least one list must contain at least one entry), click the **Process** button. Each combination of the list entries will be added to the Rates List for the current Date Range in the Override Setup window.

Example: using the data from the above screenshot, 2 entries will be created for each of the 8 salespeople – one for item 100XLG and one for item 128 SDRAM. All entries will have a blank Customer ID. This addition is additive, meaning that existing entries in the Rates List won't be updated or removed.

The Mass Insert Rates functionality only updates the temporary table that displays the current Rate List data, so the permanent setup isn't affected until the Date Range is saved or deleted.

Multiple commission rate overrides may apply to a single commission line, so the following search order is employed when determining the commission rate for a commission line:

Evaluation Order	Item Number	Salesperson ID	Customer ID
Combinations where all Master Records are Specified:			
1	Specific	Specific	Specific
Combinations where 2 Master Records are Specified:			
2	Specific	Specific	Blank
3	Specific	Blank	Specific
4	Blank	Specific	Specific
Combinations where 1 Master Record is Specified:			
5	Specific	Blank	Blank
6	Blank	Specific	Blank
7	Blank	Blank	Specific
Combinations where no Master Records are Specified:			
8	Blank	Blank	Blank

If multiple active Override IDs contain a Date Range with a Rate List entry that satisfies the same Evaluation Order number, and the commission record's Document Date falls within the Date Range for each of the Override IDs in question, the Date Range whose Start Date is nearest to the commission record's Document Date will be used. If multiple Date Ranges are still in play (because they have the same Start Date), then the first Override ID, in alphanumeric order, will provide the tiebreaker.

If a commission rate override record is found, the associated commission type and rate are used for the commission line, and the Override ID and Start Date are stored with the commission line.

Once a commission rate override record has been associated with a commission line, that Override ID and Date Range may not be deleted and the associated Rate list may no longer be edited:

Commission Plan Class Update Options
Commission Plan Setup window >> Go To >> Class Update Options

The Commission Plan Class Update Options window allows you determine what happens when a new salesperson, customer, or item is created, one of these master record types is assigned to a new class, or the commission plan setup for a class is changed.
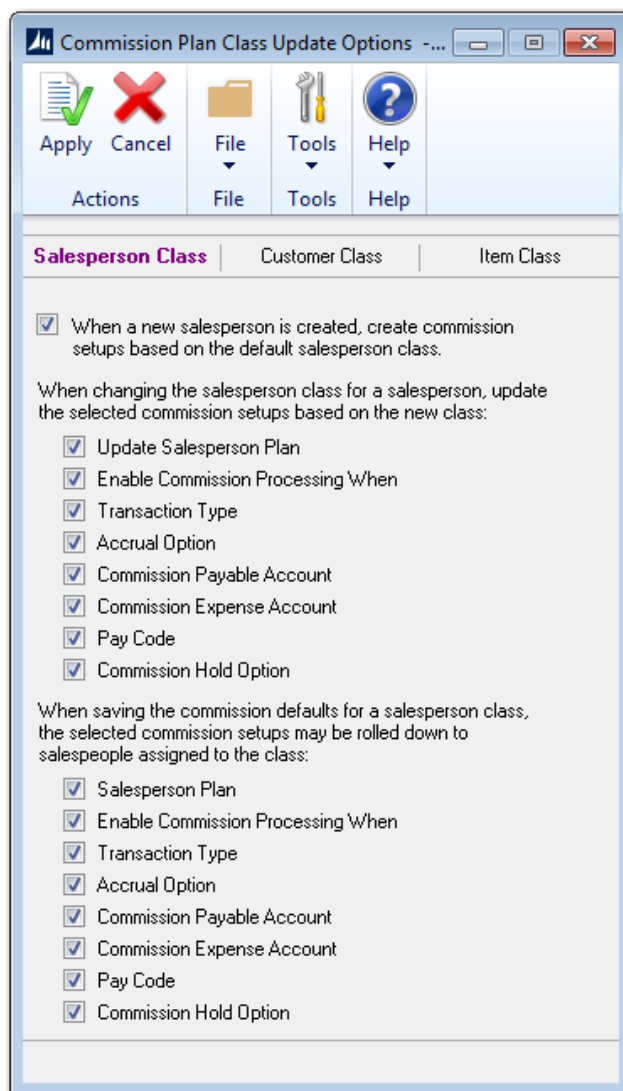
Unlike Dynamics GP, the class-based commission updates occur automatically. This allows the master records to be created or updated via outside applications such as eConnect, and the associated commission setup data is also updated.

Commission Plan Salesperson Class Setup
Commission Plan Setup window >> Go To >> Salesperson Class Setup

Commission Plan allows you to create and assign classes to salespeople. This functionality allows you to perform actions - such as processing commissions or printing commission reports - on a range of Salesperson Classes rather than a range of individual salespeople.

Example: Your inside salespeople are paid monthly and your outside salespeople are paid quarterly. By creating an INSIDE class and an OUTSIDE class and assigning salespeople to the desired class, you can easily process commissions each month for the correct group of salespeople by using a class restriction.

Use the Commission Plan Salesperson Class Setup window to create salesperson classes, along with commission setup defaults.

When a Salesperson Class is marked as Default, the commission setup information for this class will default into the Commission Plan Salesperson Class Setup window when you create new classes. When a new salesperson is created, this class and associated commission setup information will be assigned to the new salesperson if the option is marked in the Commission Plan Class Update Options window.

Assign Salesperson Classes to salespeople using the Salesperson Commission Plan Info window, our alternate Salesperson Maintenance window, or the Mass Update Salespeople window – salesperson commission information will be updated based on selections made in the Commission Plan Class Update Options window.

When changes are made to a salesperson class, the commission setup for each salesperson assigned to the class will be updated based on selections made in the Commission Plan Class Update Options window.

Commission Plan Customer Class Setup
Commission Plan Setup window >> Go To >> Customer Class Setup

The Commission Plan Customer Class Setup window allows you to create default commission setups for Dynamics GP customer classes.

When a new customer is created or when an existing customer is moved to a new class, the customer's commission setup information will updated based on selections made in the Commission Plan Class Update Options window.

When commission setup changes are made to a customer class, the commission setup for each customer assigned to the class will be updated based on selections made in the Commission Plan Class Update Options window.

Commission Plan Item Class Setup
Commission Plan Setup window >> Go To >> Item Class Setup

The Commission Plan Item Class Setup window allows you to create default commission setups for Dynamics GP item classes.

When a new item is created or when an existing item is moved to a new class, the item's commission setup information will updated based on selections made in the Commission Plan Class Update Options window.

When commission setup changes are made to an item class, the commission setup for each item assigned to the class will be updated based on selections made in the Commission Plan Class Update Options window.

Salesperson Commission Plan Info
Sales Area Page >> Cards >> Commission Plan >> Salesperson Commission Plan Info

The Salesperson Commission Plan Info window is used to assign a Salesperson Plan to a salesperson and to define options for processing commissions specific to the selected salesperson.

The **Class ID** field is used to enter a Salesperson Class for the current salesperson. Commission setups will be updated for the salesperson based on selections made in the Commission Plan Class Update Options window.

The **Salesperson Plan** field is used to enter a Salesperson Plan for the current salesperson.

This window is also used to determine when commissions will be processed for a salesperson, what type of Microsoft Dynamics GP transaction will be created when commissions are processed, whether commission accruals may be processed, and to place a salesperson's account on hold from receiving commissions – or remove the hold status.

The **Enable Commission Processing When** drop-down list has two choices and is editable only when the Enable Commission Processing When setting in the Commission Plan Setup window is set to **Based on Salesperson**.

- *Document is Posted* - commissions are due to the salesperson as soon as sales documents are posted within Microsoft Dynamics GP.

- *Document is Paid* - commissions are due when sales documents are fully paid. Invoices and returns are deemed fully paid when the amount remaining as displayed in Receivables Transaction Inquiry – Customer, is $0.00. This means that invoices must be fully paid before commissions may be paid. If the Returns Considered Paid When setting in the Commission Plan Setup window is set to **Fully Applied**, then returns must be fully applied before commissions may be paid; otherwise, commissions are due to the salesperson as soon as returns are posted.

The **Create Transaction** option determines what type of Microsoft Dynamics GP transaction will be created when commissions are processed. Only the options marked in the Commission Plan Setup window are allowed.

The **Create Accrual Trx** checkbox determines whether commissions for the current salesperson will be included in the commission accrual routine. See the Accruing Commissions section of this document for detailed information on accruing commissions.

Marking the **GL**, **Payables**, or **Payroll** transaction option will require you to enter **Commissions Payable** and **Expense Accounts**. Marking the Payroll transaction option will also require you to enter a **Commission Payroll Code**.

The **Hold Commissions** checkbox is used to place or remove holds on unprocessed commissions for the selected salesperson. If you change this setting and save the record, you will be prompted to update all existing unprocessed commissions. Commission records created after this point will be set to the hold status assigned to the salesperson. The Commission Plan Utilities window can also be used to update the hold status for existing unprocessed commissions.

Use the Salesperson Commission Plan Info window to assign Salesperson Classes and Salesperson Plans to salespeople without the need to grant security to the alternate Salesperson Maintenance window provided by EthoTech.

All options on the Salesperson Commission Plan window can be set for multiple salespeople using the Mass Update Salespeople window. See the Mass Update Salespeople section of this document for details.

Sales Territory Commission Plan Info
Sales Area Page >> Cards >> Commission Plan >> Sales Territory Commission Plan Info

This window is used to assign salespeople to a sales territory for commission processing.

The **View By** field is used for complex setups. This is a display only control for the scrolling window and does not alter the data in any way. You may select to view the additional salespeople in Salesperson ID, Salesperson Plan, or Item Plan order and you may view a subset of the data by setting a range.

When a salesperson is added to a sales territory in this window, the **Salesperson Plan** is required along with a **Split** percentage. The split percentage is normally set to 100% (default value), which means the salesperson will receive 100% of their commission as defined by the commission matrix. The split percentage can also be set to a value other than 100%, so they would receive that percentage of their standard commission. The options available in this window are affected by the **Determine Additional Salespeople Using** selection in the Commission Plan Setup window:

- If the Sales Document Header Info option is selected, the **Item Plan** field is not available. Salespeople assigned to a sales territory are commissioned for all line items on a sales document for that territory.

- If the Sales Document Line Info option is selected, the Item Plan field is available. Salespeople assigned to a sales territory with NO Item Plan restriction are commissioned only for sales document line items that match the territory. Salespeople assigned to a sales territory with an Item Plan restriction are commissioned only for sales document line items that match the territory and item plan restriction.

Customer Commission Plan Info
Sales Area Page >> Cards >> Commission Plan >> Customer Commission Plan Info

The Customer Commission Plan Info window is primarily used to assign a Customer Plan to a customer.

The **Customer Plan** field is used to enter a Customer Plan for the current customer.

The **CP User Defined 1** field (which displays the label entered in the Commission Plan Setup window - Route in this example) is used to enter a user-defined value for the current customer.

If you have salespeople assigned to the current customer's sales territory but do not wish those salespeople to be commissioned for sales to this customer, mark **the Ignore Sales Territory - Salesperson Assignments** checkbox.

This window is also used to assign multiple salespeople to the current customer, customer address, and/or item plan for commission processing.

The **View By** field is used for complex setups. This is a display only control for the scrolling window and does not alter the data in any way. You may select to view the additional salespeople in Salesperson ID, Salesperson Plan, Address Code, or Item Plan order and you may view a subset of the data by setting a range.

When a salesperson is added to a customer in this window, the **Salesperson Plan** is required along with a **Split** percentage. The split percentage is normally set to 100% (default value), which means the salesperson will receive 100% of their commission as defined by the commission matrix. The split percentage can also be set to a value other than 100%, so they would receive that percentage of their standard commission. The options available in this window are affected by the **Determine Additional Salespeople Using** selection in the Commission Plan Setup window:

- If the Sales Document Header Info option is marked, the **Item Plan** field is not available. Salespeople assigned to a customer with NO **Address Code** restriction are commissioned for all line items on the sales document. Salespeople assigned to a customer with an Address Code restriction are commissioned for all line items on the sales document if the ship-to address displayed in the Sales Customer Detail Entry window matches the address code restriction.

- If the Sales Document Line Info option is marked, the Item Plan field is available. Salespeople assigned to a customer with NO Address Code or Item Plan restrictions are commissioned for all line items on the sales document. Salespeople assigned to a customer with an Address Code restriction are commissioned only for those line items on the sales document where the ship-to address displayed in the Sales Item Detail Entry window matches the address code restriction. Salespeople assigned to a customer with only an Item Plan restriction are commissioned only for line items on the sales document that are assigned to the item plan. Salespeople assigned to a customer with both an Address Code and an Item Plan restriction are commissioned only for those line items on the sales document that are assigned to the item plan and whose ship-to address matches the address code restriction.

Use the Customer Commission Plan Info window to assign Customer Plans and User-defined values to customers without the need to grant security to the alternate Customer Maintenance window provided by EthoTech.

All options on the Customer Commission Plan window can be set for multiple salespeople using the Mass Update Customers window. See the Mass Update Customers section of this document for details.

User-Defined 1 Commission Plan Info
Sales Area Page >> Cards >> Commission Plan >> User-Defined 1 Commission Plan Info

This window is used to assign salespeople to a CP User-Defined 1 value for commission processing. This functionality is not available for clients running Commission Plan Keystone.

The **View By** field is used for complex setups. This is a display only control for the scrolling window and does not alter the data in any way. You may select to view the additional salespeople in Salesperson ID, Salesperson Plan, or Item Plan order and you may view a subset of the data by setting a range.

When a salesperson is added to a user-defined value (a Route, in this example) in this window, the **Salesperson Plan** is required along with a **Split** percentage. The split percentage is normally set to 100% (default value), which means the salesperson will receive 100% of their commission as defined by the commission matrix. The split percentage can also be set to a value other than 100%, so they would receive that percentage of their standard commission. The options available in this window are affected by the **Determine Additional Salespeople Using** selection in the Commission Plan Setup window:

- If the Sales Document Header Info option is selected, the **Item Plan** field is not available. Salespeople assigned to a user defined value are commissioned for all line items on a sales document whose customer has been assigned to that user defined value.

- If the Sales Document Line Info option is selected, the Item Plan field is available. Salespeople assigned to a user defined value with NO Item Plan restriction are commissioned for all line items on a sales document whose customer has been assigned to that user defined value. Salespeople assigned to a user defined value with an Item Plan restriction are commissioned only for sales document line items that match the item plan restriction and whose customer has been assigned to that user defined value.

Item Commission Plan Info
Sales Area Page >> Cards >> Commission Plan >> Item Commission Plan Info

The Item Commission Plan Info window is primarily used to assign an Item Plan to an inventory item.

The **Item Plan** field is used to enter an Item Plan for the current inventory item.

If Commission Tiers are enabled, the **Edit Tiers** expansion arrow is used to open the Commission Plan Item Tiers window to edit the tier schedule for the selected inventory item. See the Item Tiers section of this document for detailed information.

The **Sale Amount From** section has three options and is editable only when the Sale Amount From setting in the Commission Plan Setup window is set to **Based on Item**.

- *Sales Document Price* - the commissionable sale amount is based on the sales document line extended price.

- *List Price* - the commissionable sale amount is based on the inventory item's list price * quantity in base unit of measure.

- *Multiplier* - regardless of the commissionable sale amount option, the commissionable sale amount is multiplied by the percentage listed in the Multiplier field. This allows loading or reducing commissionable sale amounts.

The **Cost Amount From** section has five options and is editable only when the Cost Amount From setting in the Commission Plan Setup window is set to **Based on Item**.

- *Sales Document Cost* - the commissionable cost amount is based on the sales document line extended cost.

- *Standard Cost* - the commissionable cost amount is based on the inventory item's standard cost * quantity in base unit of measure.

- *Sales Document Price* - the commissionable sale amount is based on the sales document line extended price.

- *List Price* - the commissionable sale amount is based on the inventory item's list price * quantity in base unit of measure.

- *Multiplier* - regardless of the commissionable cost amount option, the commissionable cost amount is multiplied by the percentage listed in the Multiplier field. This allows loading or reducing commissionable cost amounts.

This window is also used to assign salespeople to the current inventory item for commission processing.

When a salesperson is added to an item in this window, the **Salesperson Plan** and **Split** percentage are required. The split percentage is normally set to 100%, which means the salesperson will receive 100% of their commission as defined by the commission matrix. The split percentage can also be set to a value other than 100%, so they would receive that percentage of their standard commission. Salespeople assigned to an item are commissioned only for that line item on the sales document.

Use the Item Commission Plan Info window to assign Item Plans to inventory items without the need to grant security to the alternate Item Maintenance window provided by EthoTech.

All options on the Item Commission Plan window can be set for multiple salespeople using the Mass Update Items window. See the Mass Update Items section of this document for details.

Creating Commissions

Commission Plan commission records are first created by the earliest of the following six (6) events:
- Saving a sales document for a document type that has been marked in the Commission Plan Setup window.
- Opening the Commission Plan Entry window for an unsaved or unposted sales document whose document type is marked in the Commission Plan Setup window.
- Posting a sales document.
- Transferring a sales document from a document type not marked in the Commission Plan Setup window to a document type that is marked.
- Running Commission Plan Utilities.
- Using Dynamics GP Integration Manager to create sales transactions in the SOP module.

NOTE: Negative commissions are created for sales returns and invoices with negative quantities or negative prices.

When commissions are first created for a sales document, references are created to the relevant Commission Plan setup tables. When commissions are updated (posting, applying payments, etc), Commission Plan uses these "snapshots" of the setup tables. Therefore, changes made to setups will not affect existing commissions unless commissions are deleted and recreated. See the Commission Plan Utilities section of this document for details.

Determining the Salespeople for a Sales Document

The salespeople commissioned for a sales document are determined by different criteria depending on whether Commission Plan is set up to commission salespeople based on sales document header information or sales document line item information, and are determined in the following order:

Sales document header information
*(The Item Plan field on the Customer Commission Plan Info window is **disabled**)*

All salespeople, except those determined by numbers 6 and 7 below, will be commissioned on all sales line items.

1. Salespeople from Customer Commission Plan Info whose address code restriction matches the sales document header ship-to address code.
2. Salespeople from Customer Commission Plan Info without an address code restriction.
3. Salespeople from Sales Territory Commission Plan Info.
4. Salespeople from User-Defined 1 Commission Plan Info.
5. The salesperson assigned to the sales document header (if the Commission Which Sales Document Salespeople option in the Commission Plan Setup window includes sales document header salespeople).
6. The salespeople assigned to sales document line items (if the Commission Which Sales Document Salespeople option in the Commission Plan Setup window includes sales document line salespeople). These salespeople will only be commissioned on applicable sales document lines.
7. Salespeople from Item Commission Plan Info assigned to a sales document line item. These salespeople will only be commissioned on applicable sales document lines.

If the Salesperson may be commissioned multiple times per sales document option is **marked** in the Commission Plan Setup window and the same salesperson is assigned on multiple windows, then that salesperson will be commissioned multiple times for the sales document.

We create commissions for all salespeople that fit the first criteria above, then we create commissions for the all salespeople that fit the second criteria, then we create commissions for all salespeople that fit the third, and so on.

Example: salesperson ERIN J. is assigned to the customer via the Customer Commission Plan Info window and the document's sales territory via the Sales Territory Commission Plan Info window. Erin will have two separate commissions for the sales document.

If the [Salesperson may be commissioned multiple times per sales document](#) option is **unmarked** in the [Commission Plan Setup](#) window and the same salesperson is assigned on multiple windows, then that salesperson will be commissioned once for the sales document, based on the ranking established in the Commission Plan From Ranking Setup window (Commission From Rankings expansion arrow on the Commission Plan Setup window).

We create commissions for all salespeople that fit the first criteria as specified in the Commission Plan From Ranking Setup window, then we create commissions for all salespeople that fit the second criteria who were not already found by the first criteria, then we create commissions for all salespeople that fit the third criteria who were not already found by the first and second criteria, and so on.

Example: salesperson ERIN J. is assigned to the customer via the Customer Commission Plan Info window and the document's sales territory via the Sales Territory Commission Plan Info window. If the Customer Commission Plan Info appears above Sales Territory Commission Plan Info, then Erin will be commissioned using the information from the Customer Commission Plan Info entry; otherwise, Erin will be commissioned using the information from the Sales Territory Commission Plan Info entry.

Sales document line item salesperson(s)
*(The Item Plan field on the Customer Commission Plan Info window is **enabled**)*

All Salespeople, except those determined by numbers 6, 8 and 10 below, will be commissioned only on applicable sales line items.

1. Salespeople from Customer Commission Plan Info whose address code restriction matches the sales document line item ship-to address code and whose item plan restriction matches a sales document line item plan.
2. Salespeople from Customer Commission Plan Info whose address code restriction matches the sales document line item ship-to address code only (no item plan restriction).
3. Salespeople from Customer Commission Plan Info whose item plan restriction matches a sales document line item plan only (no address code restriction).
4. Salespeople from Customer Commission Plan Info with neither an address code nor an item plan restriction. These salespeople will be commissioned on all sales document line items.
5. Salespeople from Sales Territory Commission Plan Info whose item plan restriction matches a sales document line item plan.
6. Salespeople from Sales Territory Commission Plan Info with no item plan restriction. These salespeople will be commissioned on all sales document line items.
7. Salespeople from User-Defined 1 Commission Plan Info whose item plan restriction matches a sales document line item plan.
8. Salespeople from User-Defined 1 Commission Plan Info with no item plan restriction. These salespeople will be commissioned on all sales document line items.
9. The salesperson assigned to the sales document header (if the Commission Which Sales Document Salespeople option in the [Commission Plan Setup](#) window includes sales document header salespeople). This salesperson will be commissioned on all sales document line items.

10. The salespeople assigned to sales document line items (if the Commission Which Sales Document Salespeople option in the Commission Plan Setup window includes sales document line salespeople).
11. Salespeople from Item Commission Plan Info assigned to a sales document line item.

If the Salesperson may be commissioned multiple times per sales document option is **marked** in the Commission Plan Setup window and the same salesperson is assigned on multiple windows, then that salesperson will be commissioned multiple times for the sales document.

We create commissions for all salespeople that fit the first criteria above, then we create commissions for the all salespeople that fit the second criteria, then we create commissions for all salespeople that fit the third, and so on.

Example: salesperson ERIN J. is assigned to the customer via the Customer Commission Plan Info window and the document line's sales territory via the Sales Territory Commission Plan Info window. Erin will have two separate commissions for the sales document.

If the Salesperson may be commissioned multiple times per sales document option is **unmarked** in the Commission Plan Setup window and the same salesperson is assigned on multiple windows, then that salesperson will be commissioned once for the sales document, based on the ranking established in the Commission Plan From Ranking Setup window (Commission From Rankings expansion arrow on the Commission Plan Setup window).

We create commissions for all salespeople that fit the first criteria as specified in the Commission Plan From Ranking Setup window, then we create commissions for all salespeople that fit the second criteria who were not already found by the first criteria, then we create commissions for all salespeople that fit the third criteria who were not already found by the first and second criteria, and so on.

Example: salesperson ERIN J. is assigned to the customer via the Customer Commission Plan Info window and the document line's sales territory via the Sales Territory Commission Plan Info window. If the Customer Commission Plan Info appears above Sales Territory Commission Plan Info, then Erin will be commissioned using the information from the Customer Commission Plan Info entry; otherwise, Erin will be commissioned using the information from the Sales Territory Commission Plan Info entry.

Determining Split Amounts
Commission Splits are defined as a percentage of the commission as defined by the Commission Plan Matrix.

Example: Using the Standard matrix option, Mary's commission rate is 10% of the selling price on bales of wool (defined by the matrix), so when a bale is sold for $10.00 she receives a commission of $1.00 when her split is set to 100% (the default setting). If her split was set to 85%, her commission would change:

If the Reduce Commissionable Amounts for Commission Line Splits option is not selected, her commission would be $0.85 (85% of $1.00); otherwise, her commissionable sale amount would be $8.50 [10.00 * .85], and her commission would be $0.85 [8.50 * .10].

Splits are calculated differently depending on whether Commission Plan is set up to commission salespeople based on sales document header information or sales document line item information.

If Commission Plan is set up to commission salespeople based on sales document header information and the Roll Down Header Splits to Commission Lines option is selected, then the split is calculated using the sales document line item information methodology.

Sales document header information
- The split is calculated at the commission header level (the commission line Split will be 100%), unless the salesperson is commissioned using information from the Item Commission Plan Info window (all splits from this window appear at the commission line level).
- The net amount for a commission line is calculated using the commission rate found for the commission line Item Plan, Salesperson Plan, and Customer Plan combination. Then the total of all commission line net amounts is multiplied by the split percentage to reach the net amount for the commission header.

Sales document line item information
- The split is calculated at the commission line level (the commission header Split will be 100%).
- If Commission Plan is set up to Reduce Commissionable Amounts for Commission Line Splits:
  - The commission line commissionable sale and cost amounts are first multiplied by the split percentage. Then the gross commission line amount is calculated using the commission rate found for the commission line Item Plan, Salesperson Plan, and Customer Plan (if no rate is found, the commissionable sale and cost amounts are set to zero). The net commission line amount is set to the gross commission line amount. The net amount for the commission header is the total of all net commission line amounts (if using the Quotas matrix option, no line item or header commission amounts will be calculated).
- If Commission Plan is NOT set up to Reduce Commissionable Amounts for Commission Line Splits:
  - A gross commission line amount is first calculated using the commission rate found for the commission line Item Plan, Salesperson Plan, and Customer Plan. Then the gross commission line amount is multiplied by the split percentage to reach the net commission line amount. The net amount for the commission header is the total of all net commission line amounts.

Commission Plan Entry
Sales Area Page >> Transactions >> Commission Plan >> Commission Plan Entry

The Commission Plan Entry window is available from the Sales Transaction Entry Additional menu, the hotkey CTRL + M, the Commission Plan button on the Sales Transaction Entry window (if you are using the alternate window provided by EthoTech) and the Commission Plan Transactions menu. Commission Plan Entry may only be used for document types that have been marked in the Commission Plan Setup window. If you open Commission Plan Entry from Sales Transaction Entry, then the appropriate sales document will be displayed; otherwise you must select the Type and Document Number to display the Commission Plan data.

You may only edit unprocessed commission records in Commission Plan Entry. If you edit a commission record, the **Manual** checkbox will be marked. The scrolling window summarizes the Commission Plan information for each salesperson assigned to the document. Additional salespeople can be manually assigned by entering the **Salesperson ID** field, in which case the **Salesperson From** will be set to Manual Entry. A manually entered salesperson will be initially commissioned for all line items on the sales document. All other information is added automatically but may be overridden. You may override the **Salesperson Plan,** the **Customer Plan,** and the **Split** percentage for a specific salesperson on a specific document. If all commissions have been placed on hold for a salesperson (see the *Salesperson Commission Plan Info* section of this document), the **Hold** checkbox will be marked and may not be unmarked; otherwise you can place and remove commission holds for a specific salesperson on a specific document using the Hold checkbox.

The **Go To** button can be used to open the following windows:

1. The Noncommissioned Salesperson Inquiry window, which displays salespeople who are not commissioned because they were inactive at the time commissions were first created for the sales document and salespeople whose commissions for the document were deleted.

⚠ The Noncommissioned Salesperson Inquiry window can also be accessed from the Commission Plan Inquiry Zoom window. See the Commission Plan Inquiry section of this document for details.

2. The Commission Plan Override Dates window, which allows you to override sales document dates for commission purposes (see the Commission Plan Override Dates section of this document).

3. The Commission Plan Sales Document Info window, which allows you to override sales document line information for commission purposes.

The **List Price** and **Standard Cost** may be edited. Depending on your setup, editing these values may automatically update the **Commissionable Unit Sale Amt** and / or **Commissionable Unit Cost Amt**.

The **Price Sheet** may be edited if you're using Price Sheet Tiers.

When any value in this window is edited, the corresponding **Override** checkbox is marked.

When you save your edits, the unprocessed commissions for the sales document will be updated, 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 Commission Plan Integration tables with overridden commissionable amounts.

Clicking the Reset button will remove all edits for the sale document and update the unprocessed commissions, except in the scenarios listed above.

⚠ All amounts in the Commission Plan Sales Document Info window are Unit amounts. When commission lines are updated due to manual edits of these amounts, the unit amounts will be multiplied by the commissionable quantity to achieve the commissionable extended amount. The extended amounts are then subject to splits and reductions.

If the Salesperson may be commissioned multiple times per sales document option is unmarked, you can click the **Salesperson From Rankings** expansion arrow to open the Commission Plan Salesperson From Ranking Inquiry window, which will display the ranking set at the time commissions were first created for the sales document.
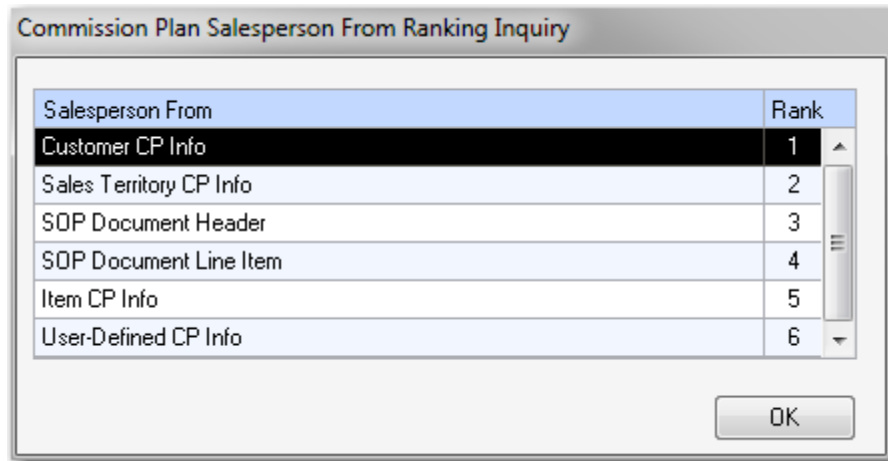
To edit the line item detail for a salesperson's commission, click on any field on the line of the salesperson to be viewed, and then click the **Commission Detail** expansion button (arrow next to the Commission field) to open the Commission Plan Detail Entry window.

The Commission Plan Detail Entry window allows you to view, edit and override Commission Plan information for specific line items for the salesperson. Changes to the line item will only apply to this sales document and this salesperson. In addition to changing the Commission Type, Rate %, or Amount, you may change the Item Plan, Salesperson Plan, Split percentage, Commissionable Sale Amount and the Commissionable Cost Amount. The Commission Plan Detail Entry window will be view-only for processed commissions.

The **Item Plan** can be changed for this line item, for this salesperson only, simply by entering a new Item Plan in the scrolling window. The **Salesperson Plan** and **Customer Plan** can be changed for all line items, for this salesperson only, by entering a new Salesperson Plan or Customer Plan in the main Commission Plan Detail Entry window (you can also change the Salesperson Plan and Customer Plan for all line items for this salesperson only, by entering a new Salesperson Plan or Customer Plan in the Commission Plan Entry window). The Salesperson Plan can be changed for this line item, for this salesperson only, simply by entering a new Salesperson Plan in the scrolling window. The **Commission Type**, **Rate %** (or **Rate Amount**, depending on the Type selected), will be set to the values from the

Commission Plan Matrix, and the **Gross Commission Amount** and **Net Commission Amount** will be recalculated. You can also override the Commission Type, Rate % (or Rate Amount, depending on the Type selected), and the **Split** percentage, and the Gross Commission Amount and Net Commission Amount will be recalculated. If the Reduce Commissionable Amounts for Commission Line Splits checkbox is marked on the Commission Plan Setup window and the line item split percentage is less than 100%, then the commissionable sale and cost amounts will be reduced by the split percentage before the commission is calculated and the net commission amount will equal the gross commission amount; otherwise the net commission amount will equal the gross commission amount multiplied by the split percentage.

The **Commissionable Sale Amount** is based on the sales document line item sale amount or the inventory item's list price. The **Commissionable Cost Amount** is based on the sales document line item cost or sale amount or the inventory item's standard cost or list price. If set up to derive the commissionable cost from the sales document line item extended cost, the commissionable cost is automatically updated when a sales document is posted, as this is when the final sales line item cost is calculated. The commissionable sale and/or cost amounts are also updated if Commission Plan is set up to reduce commissions for discounts, write-offs, payment terms, credit card payments, or late payments. If you decide to override the commissionable amounts, a new commission amount will be calculated based upon the figures entered, and the commissionable amounts will not be automatically updated for any reason (unless commissions are deleted and recreated).

If the Quotas matrix option is in use, the Commission Type, Rate %, and Amount fields will be disabled. If a quota setup exists for the plan combination and commission recognition date, the Commission Type will be empty; otherwise, the Commission Type will be No Commission and the Commissionable Sale Amount and Commissionable Cost Amount will be zero.

The **Commission Trace** expansion button (arrow next to the Net Comm Amt field) opens the Commission Line Trace window.

Commission Line Trace

The Commission Line Trace window, which is accessed from the Commission Plan Detail Entry and Commission Plan Detail Inquiry Zoom windows, displays the steps taken to derive the commission line amount.

If the **Salesperson From** is set to Customer CP Info, Sales Territory CP Info, User-Defined 1 CP Info, or Item CP Info, the **Salesperson** expansion arrow opens an inquiry window that displays customer/salesperson, territory/salesperson, user-defined/salesperson, or item/salesperson assignments at the time commissions were created for the sales document.

The **Reduction** expansion buttons (arrow next to the Comm Reduction Amt fields) open the Commission Plan Reduction Inquiry window, which displays commissionable amount reductions for posted sales documents.

If the Standard matrix option is in use, the **Rate** expansion arrow opens the Commission Plan Matrix Inquiry window.

If the Tiers matrix option is in use, the **Rate** expansion arrow opens the Commission Plan Tiers Rate Inquiry window.

If the commission type or rate is manually edited in the Commission Plan Detail Entry window, then the rate expansion button window will no longer be accessible for the commission line item.

Commission Plan Integration

You can override the normally calculated commissions for a sales document using Commission Plan's integration functionality. This is useful when importing sales documents along with commission information from an outside system. This functionality is not available for clients running Commission Plan Keystone. **See the Commission Plan Integration Guide for details**.

Commission Plan Adjustment Entry
Sales Area Page >> Transactions >> Commission Plan >> Commission Plan Adjustment Entry

Commission Plan calculates commissions for Sales Order Processing document line items. Occasionally, it is necessary to create commission records that are not directly attached to a sales document. Commission adjustments are useful in the following scenarios:

- When the original commissions for a sales document are already processed, and the commission amount and/or commissionable amounts are found to be incorrect.

- When a commission amount outside the normally calculated commissions is due to a salesperson – bonuses, draws, etc.

- When chargebacks occur.

The Commission Plan Adjustments functionality allows you to create a commission adjustment document (this is not a Sales Order Processing document) and enter commissions for individual salespeople against that adjustment document. The commissions may include only a commission amount or they may include item numbers with commissionable sale and/or cost amounts, units of measure, and plan combinations.

When the Commission Plan Adjustment Entry window is opened, the next adjustment number from Commission Plan Setup will be populated in the **Adjustment No.** field – if the adjustment record is deleted before it has been saved, the adjustment number will be reused. The **Adjustment Date** is initially set to the Dynamics GP User Date, and the document date of each commission record for the adjustment document is set to the Adjustment Date. An **Adjustment Type** may be selected – this field is informational only and has no effect on commission calculations.

If the adjustment is linked to a sales document using the **Link to Posted Sales Document** checkbox and Commission Plan is set up to process commissions when sales documents are paid off, the document paid date of each commission record for the adjustment document will be set to the linked sales document's document paid date and the **Comm Status** will be set accordingly (Ready or Not Ready); otherwise, the document paid date of each commission record for the adjustment document will be set to

the Adjustment Date and the Comm Status will be set to Ready. The GL Posting Date (not displayed) is set to the Adjustment Date.

If the **Adjustment Method** is set to Summary, a **Salesperson ID**, **Salesperson Plan/Customer Plan/Item Plan** combination (this combination is required if the Quotas matrix option is in use), and **Commission** amount may be entered. The **Description** and adjustment notes may be edited by expanding the commission record view.

If the Adjustment Method is set to Detail, a Salesperson ID, Salesperson Plan, and Customer Plan may be entered (the Salesperson Plan and Customer Plan are required if the Quotas matrix option is in use), and the Item Plan and Commission fields are disabled.

If a detail commission adjustment is linked to a sales document, the line items for that document may be defaulted for a salesperson by choosing **Default From Sales Document** from the **Options** menu. The sales document line items will be added to the salesperson's commission record for the adjustment document, but the selling quantity, commissionable sale amount, and commissionable cost amount will be set to zero.

The **Commission Detail** expansion arrow is used to open the **Commission Plan Adjustment Detail Entry** window.

The Commission Plan Detail Entry window functions similarly to the Commission Plan Detail Entry, except that line items are entered manually rather than using a sales document's line items. When an **Item Number** is entered, the **U of M, Item Plan**, and **Description** are defaulted and the **Selling Quantity** is set to one. The description and adjustment notes may be edited.

Once a **Comm Sale** and/or **Comm Cost** have been entered, the **Comm Margin**, **Margin %**, **Commission Type**, commission rate (either **Rate %** or **Rate Amount**), and **Comm Amt** are calculated based on the plan combination (this combination is required if the Quotas matrix option is in use, and no commission amount is calculated - only the commissionable sale and cost amounts are tracked). Changing the plan combination will recalculate the commission, and the commission type and rate may be manually edited if Quotas are not in use.

Clicking the **Commission Trace** expansion arrow will open the Commission Line Trace window.

When the Commission Plan Detail Entry window is closed, the Commission amount for the salesperson on the Commission Plan Adjustment Entry window is updated if Quotas are not in use.

A commission record may be placed on **Hold**, which will prevent it from being processed.

The **Update** button will be enabled if the adjustment document is linked to a sales document. Clicking the update button will cause the document paid date of each unprocessed commission record for the adjustment document to be set to the linked sales document's document paid date and the commission status to be set accordingly - this also happens automatically when sales documents are posted, payment is applied, or Commission Plan utilities are run.

The **Delete** and **Void** buttons are enabled or disabled based on the options selected in Commission Plan Setup; however, a new adjustment document may always be deleted before the Save button is selected.

> *If the Quotas matrix option is in use, summary adjustment amounts will be added to the total commission amount due for a given plan combination, and the commissionable sale and cost amounts for detail adjustments will be included in the commission calculation for a given plan combination.*

Commission Plan Adjustment Import
Microsoft Dynamics GP Button >> Tools >> Integrate >> Commission Plan >> Commission Plan Adjustment Entry

Use the Commission Plan Adjustment Import window to import commission adjustment documents. This functionality is not available for clients running Commission Plan Keystone. **See the Commission Plan Integration Guide for details**.

Processing Commissions

When commissions are processed for a salesperson, the following actions occur:
- The salesperson's commissions are marked Processed and are no longer editable.

- A salesperson commission run summary record is created for the salesperson's total commission amount.

- The salesperson's total commission amount is added to the total commission run summary record.

- If the salesperson is set up to create GL, Payables, or Payroll transactions and the salesperson's total commission amount is not zero, an unposted transaction for the salesperson's total commission amount is created in the appropriate batch:

  - GL - an unposted general journal entry is created for the salesperson's total commission amount, using the salesperson's GL accounts.

  - Payables - an unposted voucher is created for the vendor assigned to the salesperson, for the salesperson's total commission amount, using the salesperson's GL accounts. An invoice is created if the total is greater than zero; otherwise a credit memo is created.

  - Payroll - an unposted transaction is created for the employee assigned to the salesperson, for the salesperson's total commission amount, using the salesperson's payroll code, and an unposted general journal entry is created for the salesperson's total commission amount, using the salesperson's GL accounts.

- The salesperson's processed commission records will be updated with the Date Commission Paid entered on the Process Commissions window. Any Dynamics GP transaction created during commission processing will use this date as the document date.

Process Commissions
Sales Area Page >> Routines >> Commission Plan >> Process Commissions
The Process Commissions window is used to pay commissions to salespeople. From this window you may print a preview report, to review the documents that will be included in the commission processing.

All commissions processed in the current run will be assigned to the **Commission Run ID** and **Date Commission Paid**.

Dynamics GP Trx Info
If the Create GL Trx option or the Create Payroll Trx option is marked in the Commission Plan Setup window, the **GL Batch Number** and **GL Transaction Date** will be required. A GL transaction will be created, using the selected batch number and transaction date, for each salesperson receiving commission in the current run whose Create Transaction option is set to GL or Payroll in the Salesperson Commission Plan Info window.

If the Create Payables Trx option is marked in the Commission Plan Setup window, the **Payables Batch Number** and **Payables Document Date** will be required. A Payables transaction will be created, using the selected batch number and document date, for each salesperson receiving commission in the current run whose Create Transaction option is set to Payables in the Salesperson Commission Plan Info window.

If the Create Payroll Trx option is marked in the Commission Plan Setup window, the **Payroll Batch Number** and **Payroll Transaction Date** will be required. A Payroll transaction will be created, using the selected batch number and transaction date, for each salesperson receiving commission in the current run whose Create Transaction option is set to Payroll in the Salesperson Commission Plan Info window.

If the **Do not create Dynamics GP transactions** option is marked, none of the Dynamics GP Trx Info options will be available, and all commissions in the current run will be processed as if the Create Transaction option is set to None in the [Salesperson Commission Plan Info](#) window for each salesperson.

Ranges
Unmarking the **Include Inactive Salespeople** checkbox will prevent commissions from being processed for salespeople who are currently marked Inactive on the Salesperson Maintenance window.

The **Document Date** range selector uses the Sales Order Processing document date to determine which records should be included for commission processing. For normal processing, the From date will be blank and the To date will be the document cut-off date, such as the end of the prior month.

The **GL Posting Date** range selector uses the Sales Order Processing general ledger posting date to determine which records should be included for commission processing. For normal processing, the From date will be blank and the To date will be the posting cut-off date, such as the end of the prior month.

The **Date Document Paid** range selector uses the Date Document Paid to determine which records should be included for commission processing. This option is only available if Commission Plan is set up to enable processing when sales documents are fully relieved. For normal processing, the From date will be blank and the To date will be the document paid cut-off date, such as the end of the prior month.

The **Salesperson Class** range selector allows you to determine whether you want to process commissions for all salesperson classes or a specific range of classes. This is typically used when internal and external salespeople are paid on different timetables, such as monthly and quarterly.

The **Salesperson ID** range selector allows you to determine whether you want to process commissions for all salespeople or a specific range of salespeople.

⚠ *Best Practice: use only one date range (Document Date, GL Posting Date, Date Document Paid) for a process run. If different sets of salespeople are paid using different criteria (Document Date vs. Date Document Paid, for example), assign these sets of salespeople to different Salesperson Classes, then process one class at a time using the appropriate criteria.*

If any salesperson in the range is set up to create a Microsoft Dynamics GP transaction, the following information will be verified per transaction type:

- GL
  - The GL batch number and status (exists and available)
  - The GL transaction date falls within an open period
  - The salesperson's commissions expense and payable accounts (exist, active, and valid)
- Payables
  - The payables batch number and status (exists and available)
  - The payables transaction date falls within an open period
  - The vendor assigned to the salesperson (exists and active)
  - The salesperson's commissions expense and payable accounts (exist, active, and valid)
- Payroll
  - The payroll batch number and status (exists and available)
  - The payroll transaction date falls within an open period
  - The GL batch number and status (exists and available)
  - The GL transaction date falls within an open period
  - The employee assigned to the salesperson (exists and active)
  - The salesperson's payroll code (exists, active, valid, and assigned to employee)
  - The salesperson's commissions expense and payable accounts (exist, active, and valid)

Clicking the **Preview** button will print a processing run summary preview report, a salesperson processing run summary preview report, and an edit list of the commission documents that will be processed based

upon the criteria selected. If any salesperson transaction creation issues exist, you'll receive the following prompt:
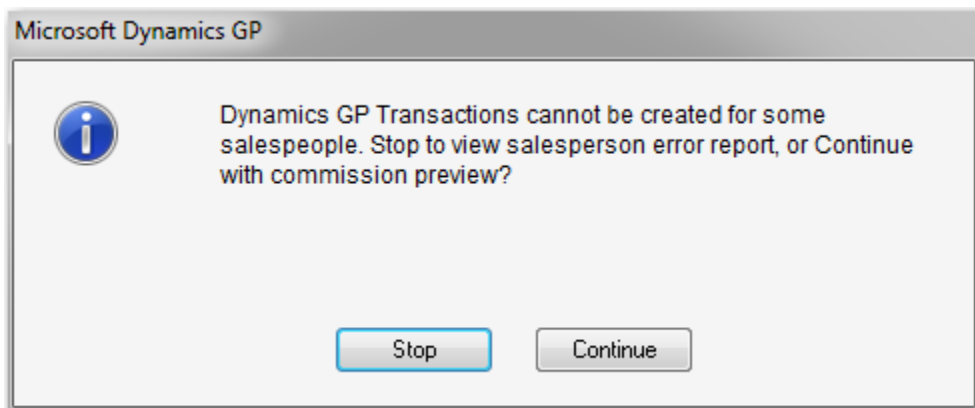
If you choose to stop, an error log showing salesperson transaction creation issues will be printed; If you choose to continue, the processing run summary preview report, salesperson processing run summary preview report, and commission document edit list will be generated.

Clicking the **Process** button will mark the commission records as paid and create Microsoft Dynamics GP transactions (if applicable). If any salesperson transaction creation issues exist, no commissions will be processed, and an error log showing salesperson transaction creation issues will be printed.
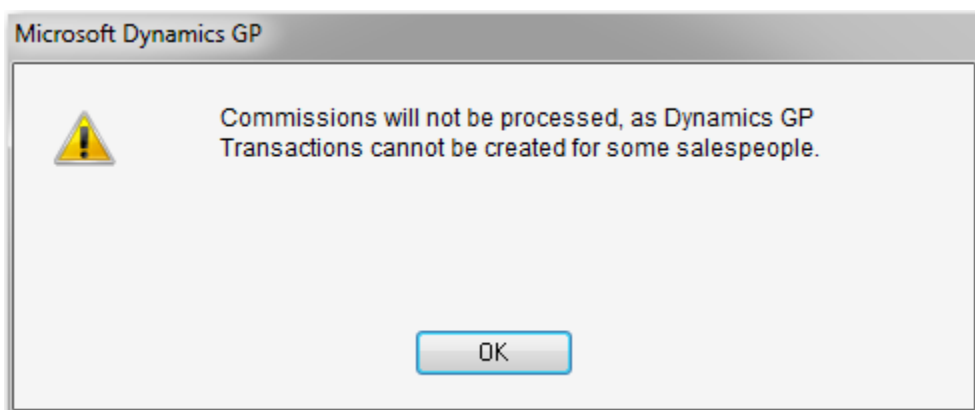
The transaction creation verification is performed for each salesperson in the selected range(s) before it's determined whether commissions exist for the salespeople so the processing routine may be stopped because salespeople with no current commissions are improperly set up. Example: a salesperson is inactive but not excluded from the processing routine, the salesperson is set up to create Payroll transactions, and the associated employee is marked Inactive on the Employee Maintenance window.

Once the process routine completes, a processing run summary report, a salesperson processing run summary report, and a list of the processed commission documents will be generated. Once commissions are processed, they are no longer editable in the Commission Plan Entry window.

⚠ *The Process Commissions step cannot be undone, so make sure all commissions are correct and a database backup has been performed prior to processing.*

The use of this window can be simple or complex depending upon your commission policies. For companies with simple commission processing policies, only a Document Date range will be entered and the Date Commissions Paid will be set to today's date. Upon reviewing the Preview reports, selecting Process will complete their commission cycle. For companies with complex commission processing policies, a Salesperson Class range, along with a Date Document Paid range, could be set as you process commissions for your internal reps only, for sales documents paid off within the last month. After entering the Date Commissions Paid and reviewing the Preview report, selecting Process will complete the Commission process for internal reps. Next, a different Salesperson Class range, along with a GL Posting Date range, could be set as you process commissions for your external reps only, for sales documents posted within the last month. After entering the Date Commissions Paid and reviewing the Preview report, selecting Process will complete the Commission process for external reps.

Calculate Commissions
If the Quotas matrix option is in use, commission transactions must be calculated before they may be processed. The **Calculate Commissions** option will be available on the Process Commissions window. The calculate routine sums the commissionable sale and cost amounts for unprocessed records for a given salesperson for each plan combination per quota period. These amounts are added to any processed commissionable sale and cost amounts for the salesperson for the plan combination and period. These totals are used to calculate the total commission for the plan combination and period. Any processed commission amounts for the plan combination and period are subtracted from the total commission to achieve the current commission amount.

The **Last Calculated** date and time will be displayed.
If Commission Plan is set up to process when documents are fully relieved, the Date Document Paid range is enabled. Using multiple date ranges may cause some commission records to be skipped but can be used to further filter your commission data.

Example: an invoice is created in December 2007 and paid off in January 2008. When processing commissions for January 2008, if you set a Document Date range of 1-1-2008 – 1-31-2008 and a Date Document Paid range of 1-1-2008 – 1-31-2008, the commissions for the invoice will be skipped as its document date falls outside the Document Date range, even though the invoice is within the Date Document Paid range.

Best Practice: use only one date range (Document Date, GL Posting Date, Date Document Paid) for a process run. If different sets of salespeople are paid using different criteria (Document Date vs. Date Document Paid, for example), assign these sets of salespeople to different Salesperson Classes, then process one class at a time using the appropriate criteria.

Enter the desired range restrictions and click the **Process** button to run the calculation routine.

You may recalculate commissions as often as you like before running the **Process Commissions** routine. When the calculate routine completes, the Salesperson Commission Quota Inquiry window will open so that you may review the calculated commission transactions.

Salesperson Commission Quota Inquiry

(Sales Area Page >> Inquiry > Commission Plan >> Commission Plan Quota Inquiry - Salesperson)

This window displays commission transactions and opens automatically when commissions are calculated.

Each salesperson's total commissionable sale and cost amounts and total commission amount for the calculation run are displayed.

Select a commission transaction and click the **Period Inquiry** expansion arrow to open the Salesperson Commission Quota Inquiry – Period window.

Salesperson Commission Quota Inquiry – Period

(Sales Area Page >> Inquiry > Commission Plan >> Commission Plan Quota Inquiry – Salesperson >> Period Inquiry expansion arrow)

This window displays the plan combination components of the commission transaction selected in the Salesperson Commission Quota Inquiry window.

In the above screenshot, Paul has not yet received commission for the SALES REP/RETAIL/HARDWARE plan combination for the second quarter of 2017, so the Processed row contains all zeroes and the Current and Total rows contain the information for the current process run.

Select a plan combination component and click the **Calculation Details** expansion arrow to open the Salesperson Commission Quota Inquiry – Period Detail window, or click the **Sales Documents** expansion arrow to open the Salesperson Commission Quota Inquiry – Period Documents window.

Salesperson Commission Quota Inquiry – Period Detail

(Salesperson Commission Quota Inquiry – Period >> Calculation Details expansion arrow)

This window displays the information used to calculate the commission amount of the current plan combination component.

Paul had a total commission margin of $603.00, of which $500.00 was not commissionable (quota exclusion). He received 10% of the remaining $103.00 of commissionable margin, and he received a summary commission adjustment of $500.00, totaling $510.30 in commission owed.

Salesperson Commission Quota Inquiry – Period Documents
(Salesperson Commission Quota Inquiry – Period >> Sales Documents expansion arrow)

This window displays the sales document plan combination commissionable sale and cost amounts for each sales document used to calculate the commission amount of the current plan combination component.

This window displays the plan combination commissionable sale and cost amount totals for invoices, returns, and detail adjustments, and displays the adjustment amounts for summary adjustments.

Select a document and click the **Document Details** expansion arrow to open the Commission Plan Inquiry Zoom window if the Type is Invoice or Return or to open the Commission Plan Adjustment Inquiry Zoom window if the Type is Comm Adjustment.

Before calculating commissions, we recommend that you run Commission Plan Utilities for historical sales transactions. This will make sure that the appropriate commission recognition date, quota period, and commissionable amounts have been set for all existing commission records for posted sales documents.

Set the Posting Status to History, Insert the desired document range, mark only the Update Existing Commissions checkbox, and click the Update button.

Accruing Commissions

Since commission GL distributions are not created when sales documents are created, Commission Plan includes a month-end routine that allows these accruals to be created. This routine creates an unposted general journal entry for each salesperson's total unprocessed commission amount for posted sales documents, using the salesperson's commission GL accounts. The general journal entry typically reverses on the first day of the following month (if the cutoff and accrual dates are set to the last day of the month), so future edits made to these commission records will be booked correctly.

Commission accruals are not available if the Quotas matrix option is in use.

Accrue Commissions
Sales Area Page >> Routines >> Commission Plan >> Accrue Commissions

The Accrue Commissions window is used to create unposted reversing general journal entries for those salespeople for whom the Create Accrual Trx option is marked in the Salesperson Commission Plan Info window.

The **Last Accrual Info** section displays the last accrual run information. All commissions accrued in the current run will be assigned to the **Accrual Run ID.** All accruals are created as unposted general journal entries assigned to the **GL Batch Number.**

Unprocessed commissions for each posted sales documents whose document date is less than or equal to the **Cutoff Date** are included in the accrual process. The document date of each general journal entry is set to the **Accrual Date.** The **Reversal Date** is defaulted to the day following the accrual date, and is set as the reversal date of each general journal entry. Typically, the cutoff and accrual dates are set to the last day of the month and thus, the reversal date will be set to the first day of the following month.

The **Include Commissions on Hold** checkbox determines whether commissions on hold should be included in the accrual run.

The **Include Inactive Salespeople** checkbox determines whether commissions for salespeople marked Inactive on the Salesperson Maintenance window should be included in the accrual run.

Clicking the **Preview** button will print an accrual run summary preview report, a salesperson accrual run summary preview report, and an edit list of the commission documents that will be accrued. If any salesperson transaction creation issues exist, you'll receive the following prompt:
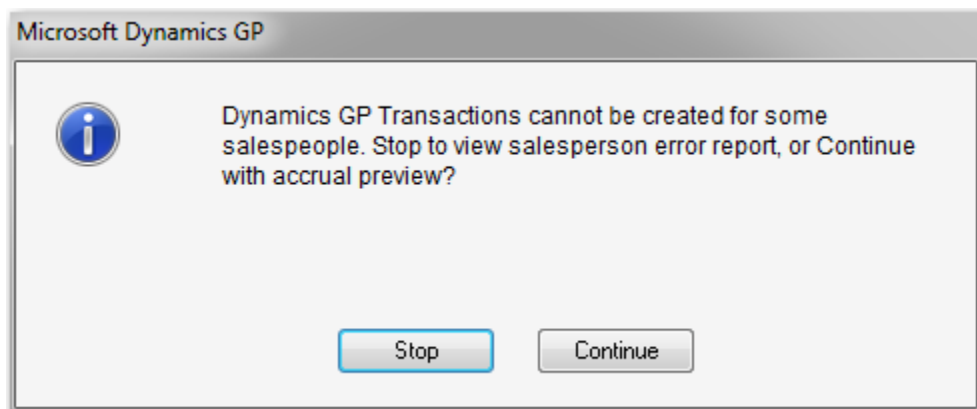
If you choose to stop, an error log showing all salesperson transaction creation issues will be printed; if you choose to continue, the accrual run summary preview report, salesperson accrual run summary preview report, and accrual document edit list will be generated.

Clicking the **Process** button will create the reversing general journal entries. The Accrual and Reversal dates are checked to make sure that they fall within an open period. If any salesperson transaction creation issues exist, no commissions will be accrued.
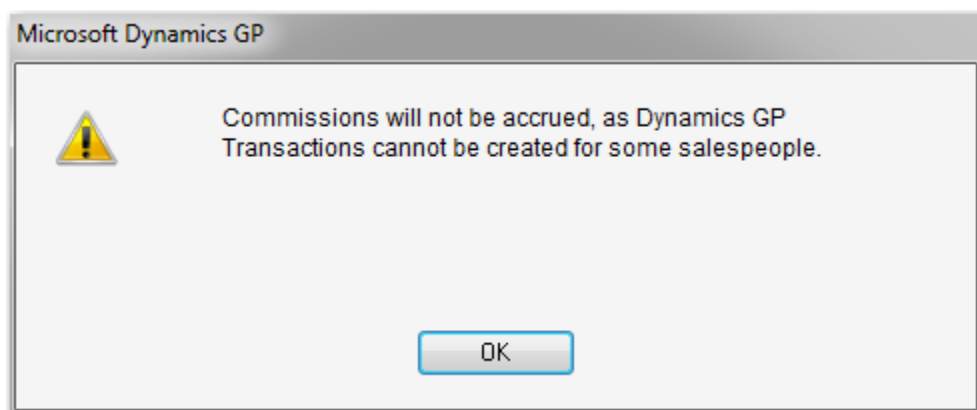
Once the accrual routine completes, an accrual run summary report, a salesperson accrual run summary report, and a list of the accrued commission documents will be generated.

To avoid double booking, the accrual routine should be run only AFTER all commissions have been processed for the month, and the routine should be run only ONCE per month.

Inquiries and Reports

Commission Plan Inquiry
Commission Plan Inquiry Zoom is a non-editable version of the Commission Plan Entry window and displays commission information for the current sales document.

The Commission Plan Inquiry Zoom window can be accessed from the following Dynamics GP windows:

- **Sales Transaction Inquiry Zoom** using the Commission Plan Additional menu (hotkey CTRL + M) or the Commission Plan button (if you are using the alternate window provided by EthoTech).

- **Sales Order Processing Document Inquiry** using the Commission Plan Additional menu (hotkey CTRL + M) or the Commission Plan Inquiry expansion button (if you are using the alternate window provided by EthoTech).

- **Receivables Transaction Entry - Customer** and **Receivables Transaction Entry - Document** using the Commission Plan Additional menu (hotkey CTRL + M) or the Commission Plan Inquiry expansion button (if you are using the alternate window(s) provided by EthoTech).

If you are using Price Sheet Tiers, you can click the **Sales Document Price Sheets Inquiry** expansion button (arrow next to the Document No. lookup button) to open the Sales Document Info Inquiry window to view price sheet assignments for sales document line items.

To view the line item detail for a salesperson's commission, click on any field on the line of the salesperson to be viewed, and then select the **Commission** expansion button (arrow next to the Commission field) to open the Commission Plan Detail Inquiry Zoom window. The **Commission Trace** expansion button (arrow next to the Net Comm Amt field) opens the Commission Line Trace window, which displays the steps taken to derive the commission line amount.

Commission Adjustment Inquiry
Sales Area Page > Inquiry > Commission Plan > Commission Adjustment Inquiry
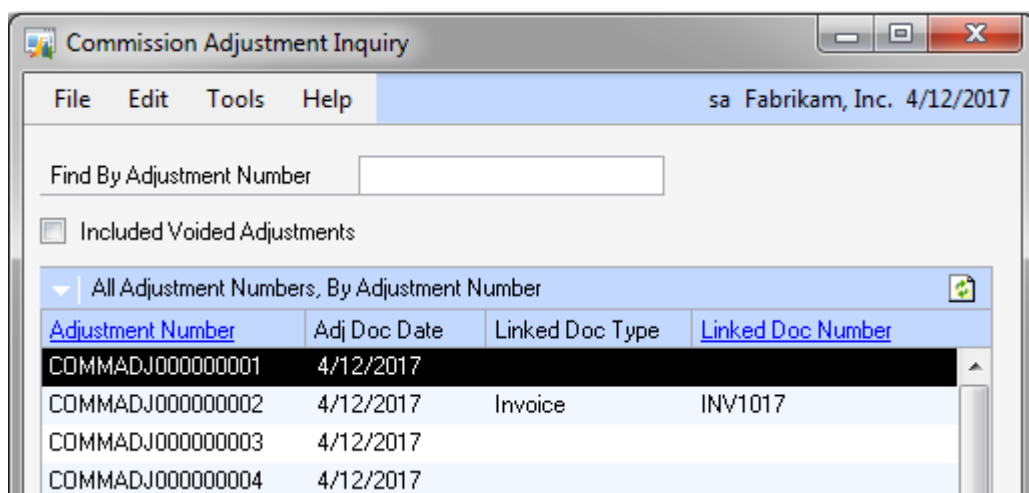
The Commission Adjustment Inquiry window displays all commission adjustment documents, along with links to the Commission Plan Adjustment Entry/Inquiry and Commission Plan Entry/Inquiry windows.

Accrual Run Inquiry
Sales Area Page >> Inquiry >> Commission Plan >> Accrual Run Inquiry

The Accrual Run Inquiry window displays a summary record for each commission accrual run.

The **View By** field is a display only control for the scrolling window. You may select to view the accrual runs in Accrual Run ID, Cutoff Date, Accrual Date, or Start Date order and you may view a subset of the data by setting a range.

Click the **Print** icon to print a report of the selected accrual runs; you will also be given an option to print a salesperson summary report for the selected accrual runs.

Click the **Salesperson** expansion button (arrow next to the Accrual Run ID field) to view a salesperson summary for the current accrual run.

Salesperson Accrual Run Inquiry
Sales Area Page >> Inquiry >> Commission Plan >> Accrual Run Inquiry - Salesperson

The Salesperson Accrual Run Inquiry window displays a summary record for each salesperson for each commission accrual run.

The **View By** field is a display only control for the scrolling window. You may select to view the salesperson accrual run summaries in Accrual Run ID, Salesperson ID, or Accrual Date order and you may view a subset of the data by setting a range.

Click the **Print** icon to print a report of the selected salesperson accrual run summaries.

Commission Run Inquiry
Sales Area Page >> Inquiry >> Commission Plan >> Commission Run Inquiry

The Commission Run Inquiry window displays a summary record for each commission processing run.

The **View By** field is a display only control for the scrolling window. You may select to view the processing runs in Commission Run ID, Date Commission Paid, or Start Date order and you may view a subset of the data by setting a range.

Click the **Print** icon to print a report of the selected processing runs; you will also be given an option to print a salesperson summary report for the selected processing runs.

Click the **Salesperson** expansion button (arrow next to the Commission Run ID field) to view a salesperson summary for the current processing run.

Salesperson Commission Run Inquiry
Sales Area Page >> Inquiry >> Commission Plan >> Commission Run Inquiry - Salesperson

The Salesperson Commission Run Inquiry window displays a summary record for each salesperson for each commission processing run.

The **View By** field is a display only control for the scrolling window. You may select to view the salesperson commission run summaries in Commission Run ID, Salesperson ID, Date Commission Paid, Transaction Type, Vendor ID, or Employee ID order and you may view a subset of the data by setting a range.

Click the toolbar **Print** icon to print a report of the selected salesperson commission run summaries; you will also be given an option to print a salesperson sales document summary report for the selected commission runs.

Click the scrolling window **Print** icon (next to the Salesperson ID field) to print a salesperson sales document summary report for the current salesperson commission run summary.

Salesperson Commission Plan Quota Inquiry
Sales Area Page >> Inquiry >> Commission Plan >> Commission Plan Quota Inquiry - Salesperson

The Salesperson Commission Plan Quota Inquiry window displays **Processed** or **Calculated** quota run summary information per salesperson. This window is available only when the Quotas matrix option is in use - see the Calculate Commissions section of this document for more details.

Commission Plan Summary History
Sales Area Page >> Inquiry >> Commission Plan >> Summary History

The Commission Plan Summary History window displays Commission Plan summary information on a single window for one salesperson at a time.

History is kept for both Calendar and Fiscal periods and can be viewed for all years or a single year. This inquiry window only includes information for processed commissions.

Commission Plan SmartList Object
The Commission Plan SmartList Object can be used to view commission summary information for all commission records. You can drill-down into the Commission Plan Entry window from a commission record in the SmartList object. (See your Microsoft Dynamics GP SmartList documentation for detailed information on the use of SmartList.)

Please see the EthoSeries Installation Guide for details on creating the Commission Plan SmartList Object.

Commission Plan Report
Sales Area Page >> Reports >> Commission Plan >> Commission Plan Report

The Commission Plan Report window is used to print current and historical summary and detail reports for sales documents with Commission Plan information. This window has many choices to determine what information will be printed on the report.

Print Options

Choose the **Single Report** option to print a single report for all selected salespeople, or choose the **One Report Per Salesperson** option to print a separate report for each selected salesperson. The **Destination** button determines whether the report(s) will be printed to the screen, a printer, and/or a file. If you choose to print one report per salesperson and you choose to print to a file, then you can also **Email reports to salespeople**. If you choose to email the reports, click the **Email** expansion arrow to open the Email Options window.

Selections in the **Email Options** section will affect all commission reports. Enter a **Subject**, **Salutation**, and **Message Body**. Recipients entered in the **To**, **Cc**, and **Bcc** fields will receive commission reports for all salespeople.

In the **Salesperson Email Options from Internet Information Window** section, select the **Salesperson Email Address Location**. By default, Commission Plan will get the salesperson's email address from the E-mail field in the Internet Information section of the Dynamics GP Internet Information Window.

If you'd like to email a salesperson's commission report to the recipients listed in the Cc field in the Dynamics GP Internet Information Window, mark the **Include Email Addresses: Cc recipients** checkbox.

If you'd like to email a salesperson's commission report to the recipients listed in the Bcc field in the Dynamics GP Internet Information Window, mark the **Include Email Addresses: Bcc recipients** checkbox.

> ⚠️ *For a salesperson's commission report to be emailed, the salesperson's email address must exist in the Dynamics GP Internet Information window (Sales Area Page >> Cards >> Salesperson >> Internet Addresses button), in either the To field within the E-mail Addresses section or the E-mail field within the Internet Information section.*

Commission Status

The four Commission Status checkboxes are the most critical selections on the window. These checkboxes analyze the document status within the system and determine which Commission Plan documents should be printed on the report. For example, to just print the documents that are ready to be processed you would only select the Posted Documents – Ready for Processing checkbox, and unselect the others before clicking the Print button.

- **Unposted Documents**. This selection will include all documents in Sales Order Processing that are not posted. Unposted documents are those sales documents that can still be accessed in Sales Transaction Entry and are saved in the Sales Transaction Work table. These documents cannot be processed until such time that they are posted as invoices or returns. Commissions can be created for unposted documents when the sales document is saved or transferred; when the Commission Plan Entry window is opened; or by using Commission Plan Utilities.

- **Posted Documents – Ready for Processing**. This checkbox represents those documents that are ready for processing within Commission Plan. Based upon your setup selections, either they are posted invoices or returns or fully applied invoices or returns.

- **Posted Documents – Not Ready for Processing**. These documents represent documents that have been posted but not fully paid or applied within Microsoft Dynamics GP. This selection is only available if you have set up your system to process commissions when documents are paid. An invoice or return is considered paid when the Amount Remaining field, as displayed in Receivables Transaction Inquiry – Customer is $0.00. Any invoice that is posted and not fully paid or return that is posted and not fully applied will be included on the report by selecting this checkbox.

- **Posted Documents – Processed**. By selecting this checkbox, commissions that have been previously processed within Commission Plan will be included on the Commission Plan Report. If you want to perform historical reporting, this would be the only checkbox you would want to select.

Document Types
This section is used to control which Sales Order Processing document types are included on the Commission Plan Report. Invoices and Returns may be included with any of the four previously mentioned checkboxes concerning commission status. Quotes, Orders, Fulfillment Orders and Back Orders can only be used when the Unposted Documents commission status is marked. Adjustments can be used with all commission statuses except for Unposted Documents. Only document types selected in the Commissionable Sales Document section on the Commission Plan Setup window may be selected in the report window.

Ranges
The **Document Date** range selector is available regardless of which commission status checkboxes are marked.

The **GL Posting Date** range selector is available only when the Posted Documents – Not Ready for Processing and/or Posted Documents – Ready for Processing and/or Posted Documents – Processed commission status checkboxes are marked.

The **Date Document Paid** range selector is available only when the Posted Documents – Ready for Processing and/or Posted Documents – Processed commission status checkboxes are marked and you have set up your system to process commissions when documents are paid.

The **Date Commission Paid** and **Commission Process Run ID** range selectors are available only when the Posted Documents – Processed commission status checkbox is marked.

The **Salesperson Class** and **Salesperson ID** range selectors are available regardless of which commission status checkboxes are marked.

Click the **Print** button to print the report(s). If you have selected the One Report Per Salesperson and the Print to File options, a report will be created for each salesperson by adding the Salesperson ID to the file name selected in the Report Destination window. If you have marked the Email checkbox, the report will be emailed to the salesperson and to any additional recipients selected. A log report will be displayed if errors occurred while emailing the reports.

If the Quotas matrix option is enabled, you'll need to mark the **Commissions with a zero commission amount** and **Commission lines with a zero commission amount** checkboxes for data to be displayed on the report(s). The report will display only commissionable sale and cost amounts, but no commission amounts.

Commission Plan Quota Report
Sales Area Page >> Reports >> Commission Plan >> Commission Plan Quota Report

The Commission Plan Quota Report window is used to print commission run reports or commission quota period to date reports when the Quotas matrix option is enabled.

Print Options

Choose the **Commission Run Report** option to print a report broken down salesperson by commission run. Choose the **Period To Date Report** option to print a report broken down by salesperson by commission quota period.

> *These reports differ when multiple commission runs occur within the same commission quota period for a salesperson. For example, if you have quarterly commission quota periods but process commissions monthly, each commission quota period would contain information from 3 commission runs.*

Choose the **Single Report** option to print a single report for all selected salespeople, or choose the **One Report Per Salesperson** option to print a separate report for each selected salesperson.

Mark the **Print Calculation Details** checkbox to print the calculation steps for each plan combination and commission period.

Mark the **Print Sales Document Report** checkbox to print a second report that displays the sales documents and commissionable amounts for each plan combination and commission period.

Mark the **Include Calculated Commissions** checkbox to print the calculated commissions. Mark the **Include Processed Commissions** checkbox to print the commissions already paid to your salespeople.

The **Destination** button determines whether the report(s) will be printed to the screen, a printer, and/or a file. If you choose to print one report per salesperson and you choose to print to a file, then you can also **Email reports to salespeople**. If you choose to email the reports, click the **Email** expansion arrow to open the Email Options window.

Selections in the **Email Options** section will affect all commission reports. Enter a **Subject**, **Salutation**, and **Message Body**. Recipients entered in the **To**, **Cc**, and **Bcc** fields will receive commission reports for all salespeople.

In the **Salesperson Email Options from Internet Information Window** section, select the **Salesperson Email Address Location**. By default, Commission Plan will get the salesperson's

email address from the E-mail field in the Internet Information section of the Dynamics GP Internet Information Window.

If you'd like to email a salesperson's commission report to the recipients listed in the Cc field in the Dynamics GP Internet Information Window, mark the **Include Email Addresses: Cc recipients** checkbox.

If you'd like to email a salesperson's commission report to the recipients listed in the Bcc field in the Dynamics GP Internet Information Window, mark the **Include Email Addresses: Bcc recipients** checkbox.

> ⚠ *For a salesperson's commission report to be emailed, the salesperson's email address must exist in the Dynamics GP Internet Information window (Sales Area Page >> Cards >> Salesperson >> Internet Addresses button), in either the To field within the E-mail Addresses section or the E-mail field within the Internet Information section.*

Ranges
If the Commission Run Report and Include Processed Commissions options are selected, you can restrict the report to processed commissions for a particular **Process Run ID** range. If the Include Calculated Commissions option is selected, calculated unprocessed commissions will be included on the report.

You can restrict the report to particular **Salesperson Class** and/or **Salesperson ID** ranges.

You can restrict the report to particular commission years using the **Year** range selector. If a single year is entered, you can restrict the report to a particular plan combination using the **Plan Combination** range selector. Once a plan combination has been entered, you can restrict the report to a **Commission Period** range.

A year and plan combination must be entered to restrict the report to a commission period range because different plan combinations can have different commission period setups for the same year, and a single plan combination can have different commission period setups for different years.

Click the **Print** button to print the report(s). If you have selected the One Report Per Salesperson and the Print to File options, then a report will be created for each salesperson by adding the Salesperson ID to the file name selected in the Report Destination window. If you marked the Print Sales Document Details checkbox, a second report will be created with the Salesperson ID and "sop" prepended to the file name.

If you have marked the Email checkbox, the report will be emailed to the salesperson and to any additional recipients selected. A log report will be displayed if errors occurred while emailing the reports.

Custom Reports & SmartList Objects

EthoTech provides the following SQL views for our commission setup and tracking tables. Whenever possible, these views should be used, rather than the actual SQL tables, when creating Crystal or SRS reports and custom SmartList objects.

- ETI_CP_SalespersonSetup – displays the salesperson setup information from the Salesperson Commission Plan Info window

- ETI_CP_CurrentCustSPAssign – displays all current salesperson > customer assignments from the Customer Commission Plan Info window

- ETI_CP_CurrentItemSPAssign – displays all current salesperson > item assignments from the Item Commission Plan Info window

- ETI_CP_CurrentTerritorySPAssign – displays all current salesperson > sales territory assignments from the Sales Territory Commission Plan Info window

- ETI_CP_CurrentUdef1SPAssign – displays all current salesperson > CP user defined 1 value assignments from the User-Defined 1 Commission Plan Info window

- ETI_CP_CurrentMatrixSetup – displays the current plan combination matrix setups from the Commission Plan Matrix Setup window

- ETI_CP_CurrentDefaultTiersSetup – displays the current default tiers setup from the Commission Plan Default Tiers window

- ETI_CP_CurrentItemTiersSetup – displays the current item-specific tiers setups from the Commission Plan Item Tiers window

- ETI_CP_CurrentPlanTiersSetup – displays the current plan combination-specific tiers setups from the Commission Plan Tiers window

- ETI_CP_SOPHDRComm – displays sales document-specific commission summary information from the Commission Plan Entry window

- ETI_CP_SOPLINEComm – displays sales document-specific commission line information from the Commission Plan Detail Entry window

- ETI_CP_CommRunSummary – displays the summary information for each commission process run

- ETI_CP_SalespersonCommRunSummary – displays the commission summary information for each salesperson and commission process run

- ETI_CP_QuotaSetupYear – displays the quota summary setup information for each quota year and plan combination

- ETI_CP_QuotaSetupPeriodHdr – displays the quota summary setup information for each quota period and plan combination

- ETI_CP_QuotaSetupPeriodLine – displays the quota level detail setup information for each quota period and plan combination

- ETI_CP_QuotaSalespersonSetupPeriod – displays the quota level detail setup information for each salesperson, quota period, and plan combination

- ETI_CP_QuotaSalespersonCommRunSummaryAdjustments – displays the commission adjustment amount for summary adjustments for each salesperson and commission process run

- ETI_CP_QuotaSalespersonCommRunPeriodHdr – displays the commission summary information for each salesperson, commission process run, and quota period

- ETI_CP_QuotaSalespersonCommRunPeriodLine – displays the commission calculation details for each salesperson, commission process run, and quota period

- ETI_CP_QuotaSalespersonCommRunPeriodDocs – displays the sales document information for each salesperson, commission process run, and quota period

Utilities

Commission Plan Utilities
Sales Area Page >> Utilities >> Commission Plan >> Commission Plan Utilities

The Commission Plan Utilities window is used primarily when a problem has been discovered with your commission data. This window can also be used during the initial implementation of Commission Plan to populate historical commission records. If a problem is found, or if you suspect there is a problem with your data, use the Preview Report to search the range of documents in question. If you wish to create historical commission records, use the Preview Report to review the range of Sales Order Processing documents for which you want to create commissions. For example, if you started using Sales Order Processing in March 2006 and then started using Commission Plan in January 2007, you might want to create commissions in Commission Plan for the period March 2006 through January 2007. Creating these historical commission records is a valuable test to verify that you have set up Commission Plan in accordance with your commission needs.

- **Preview.** Selecting this button will print a report of all discrepancies between Commission Plan and Sales Order Processing for the range of sales documents you select.
- **Update.** Selecting this button will update existing commission records or create new commission records, depending on the Options selected.
- **Posting Status.** Update commission records for Unposted (work) or History (posted) sales documents.
- **Sales Type IDs** – this option works in conjunction with the Documents range selections to restrict the sales documents to be updated.
    - ➢ **Allowed** – excludes any ignored Sales Type IDs from the sales document range.
    - ➢ **All** – includes all Sales Type IDs in the sales document range, even those set up to be ignored.
    - ➢ **Restricted** – opens the Commission Plan Utilities Sales Type ID Restrictions window, which allows the user to select specific Sales Type IDs to include in the sales document range.
- **Documents.** Select ranges based on the following fields: Document Number, Customer ID, Document Date, Batch Number, Document Type, Master Number, GL Posting Date, and Date Document Paid. The GL Posting Date and Date Document Paid options are available only when the Posting Status is set to History. When using a Date Document Paid range, if you leave the To date blank, then commissions for sales documents whose paid date is >= the From date OR whose paid date is blank (meaning the sales document has not been fully relieved) will be affected.
- **Options.** Choose the appropriate options to create / update commissions.
    - ➢ The **Update Existing Commissions** checkbox will update the commission status, commissionable sale and cost amounts (if not overridden by the user), sales document paid date, commission recognition date, commission reductions; and if the Tiers matrix option is in use, the commission rate.
    - ➢ The **Create Commissions** checkbox will create commissions only if no commission records currently exist for a sales document.
    - ➢ The **Remove Existing Commissions** checkbox will delete unprocessed commissions.
    - ➢ The **Delete and Recreate Commissions** checkbox will delete unprocessed commissions and recalculate. *NOTE: Commissions for salespeople manually added in the Commission Plan Entry window, and manual edits to automatically calculated commissions will be lost.*
    - ➢ Marking the **Prevent Commission Creation** checkbox when removing existing unprocessed commissions will prevent commissions for the associated sales documents from being recreated in the future.
    - ➢ The **Update Commission Holds** checkbox will set the hold status of all unprocessed commissions to the salesperson's hold status as listed on the Salesperson Commission Plan Info window. *NOTE: This option is only available when the Update Existing Commissions checkbox is marked.*
    - ➢ The **Reset Salesperson Inactive Status** checkbox will refer to the Salesperson Maintenance window to verify if a salesperson is currently marked Inactive, rather than referencing the EthoTech inactive tracking table created when commissions were originally calculated for the document. When the Create Commissions checkbox is marked, commissions will be created for active salespeople only; inactive salespeople will be ignored. When the Update Existing Commissions checkbox is marked, commissions will be created for salespeople who were originally marked inactive and are now active. Running the Update Existing Commissions routine will not delete an existing commission record for a salesperson that is now marked as inactive. *NOTE: This option is only available when the Update Existing Commissions or Create Commissions checkbox is marked.*
    - ➢ Use the **Reset Document Date Overrides** checkbox when creating or updating existing commissions for sales documents for which you have manually overridden the document date.

> ➢ Use the **Reset GL Posting Date Overrides** checkbox when creating or updating existing commissions for posted sales documents for which you have manually overridden the GL posting date.

> ➢ Use the **Reset Date Document Paid Overrides** checkbox when creating or updating existing commissions for posted sales documents for which you have manually overridden the document paid date.

> ➢ Use the **Reset List Price if not Overridden** checkbox to re-evaluate the list price for sales document lines for which you have not manually overridden the list price.

> ➢ Use the **Reset List Price if Overridden** checkbox to re-evaluate the list price for sales document lines for which you have manually overridden the list price.

> ➢ Use the **Reset Standard Cost if not Overridden** checkbox to re-evaluate the standard cost for sales document lines for which you have not manually overridden the list price.

> ➢ Use the **Reset Standard Cost if Overridden** checkbox to re-evaluate the standard cost for sales document lines for which you have manually overridden the list price.

> ➢ Use the **Reset SOP Line Comm Sale Overrides** checkbox to remove any sales document line Commissionable Unit Sale Amount overrides that were created via the Commission Plan Sales Document Info window.

> ➢ Use the **Reset SOP Line Comm Cost Overrides** checkbox to remove any sales document line Commissionable Unit Cost Amount overrides that were created via the Commission Plan Sales Document Info window.

> ➢ Use the **Reset Price Sheet Overrides** checkbox to re-evaluate the line item price sheet assignments for all sales document lines for which you have manually overridden the price sheet. *NOTE: This option is only available when Price Sheet Tiers are enabled.*

- **Commission Check Links.** Selecting this button will remove commissions where there is not a corresponding record in the SOP Work or History tables. It will also remove commission records for transactions in the SOP History table where the Document Type is not valid *(Invoice and Return are the only valid Document Types for the SOP History table).*

- **Remove Salesperson Percentages.** Selecting this button will change the Percent on the Salesperson Maintenance window to **zero** percent for ALL salespeople. This will prevent standard Microsoft Dynamics GP commissions from being created.

> ⚠ *Make sure you have a backup before Updating commission records and verify the reports using the Commission Plan Report window.*

When first implementing Commission Plan, you may use Commission Plan Utilities to quickly create the Commission Plan information for sales documents that already exist within Microsoft Dynamics GP. ONLY do this after all other setup has been completed for Commission Plan.

The Utilities List button will open the Commission Plan Summary Utilities and Commission Plan Override Date Document Paid windows.

Commission Plan Summary Utilities

The Commission Plan Summary Utilities window will add the Commission Plan summary information for each salesperson. This process will step through each processed Commission Plan record and add the value to the salesperson's history record. We recommend backing up your company database prior to running this utility.

Commission Plan Override Dates

The Commission Plan Override Dates window is used to override a sales document's Document Date, GL Posting Date, or Date Document Paid for commission purposes. The actual dates of the sales document are not affected, just the dates of the associated commissions.

For an unposted sales document, only the Document Date may be edited; any of the dates may be edited for posted sales documents, unless the commissions are processed. The dates can be changed for all unprocessed commissions for the selected document (by editing the appropriate CP… date) or for individual commission records for the document (by editing the appropriate date in the scrolling window).

Edit these dates to affect when the commissions will be available for processing.

For example, if you pay commissions to your salespeople when sales documents are paid, there are certain instances when the Date Document Paid calculated by Microsoft Dynamics GP is not accurate for your Commission Plan processing. Setting the date to 0/0/00 will stop the commission from being paid; otherwise, any date entered other than 0/0/00 will indicate that the customer has paid the document.

Overridden dates will be reset if commissions are deleted and recreated or updated using the Commission Plan Utilities window with the associated Reset Date option marked or when selecting Default from the Commission Plan Entry window.

Mass Update Salespeople
Sales Area Page >> Utilities >> Commission Plan >> Update Salesperson Commission Plans

The Mass Update Salespeople window allows you to quickly assign a Salesperson Plan to a range of salespeople and to update commission processing information.

The **Salespeople** drop-down list determines the field that will control the assignment and includes: by Salesperson ID, by Last Name, by Sales Territory ID, and by Salesperson Class. The From and To fields are used for the range. Leaving the From field blank starts at the beginning of the database, and leaving the To field blank will ensure processing to the end of the database.

Mark the **Update Salesperson Plan** checkbox to update the salesperson plan for salespeople in the selected range.

If the **Update Transaction Type** checkbox is marked, the **Create Transaction** option is enabled. Only those transaction types marked in the Commission Plan Setup window are allowed.

If the Create Accrual checkbox is marked in the Commission Plan Setup window, the **Update Accrual Option** checkbox is enabled. If you mark this option, the **Create Accrual Trx** checkbox is enabled.

If the **Update Pay Code** checkbox is marked, the **Commission Payroll Code** field is enabled.

If the Enable Processing When option is set to Based on Salesperson in the Commission Plan Setup window, the **Update Enable Commission Processing When Option** checkbox is enabled. If you mark this option, the **Enable Commission Processing When** field is required.

If the **Update Commissions Payable Acct** checkbox is marked, the **Commissions Payable Account** and field is enabled.

If the **Update Commissions Expense Acct** checkbox is marked, the **Commissions Expense Account** and field is enabled.

If the **Update Commission Hold Option** checkbox is marked, the **Hold Commissions** checkbox is enabled. All existing commissions for salespeople in the selected range will be set to the Hold Commissions checkbox value. Commission adjustments may be excluded by unmarking the **Update Holds for Commission Adjustments** checkbox.

Mass Update Customers
Sales Area Page >> Utilities >> Commission Plan >> Update Customer Commission Plans

The Mass Update Customers window allows you to quickly assign a Customer Plan to a range of customers.
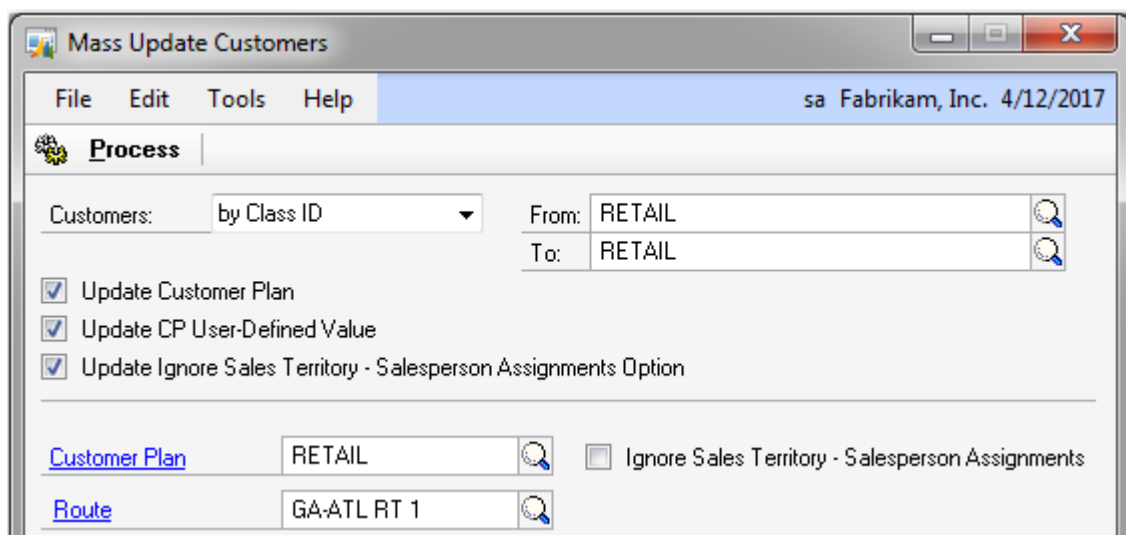
The **Customers** drop-down list determines the field that will control the assignment and includes: by Customer ID, by Name, by Class ID, Type, by Salesperson ID, and by Sales Territory ID. The From and To fields are used for the range. Leaving the From field blank starts at the beginning of the database and leaving the To field blank will ensure processing to the end of the database.

Mark the **Update Customer Plan** checkbox to update the customer plan for customers in the selected range.

Mark the **Update CP User-Defined Value** checkbox to update the customer user-defined value for customers in the selected range.

If the Update **Ignore Sales Territory - Salesperson Assignments Option** checkbox is marked, the **Ignore Sales Territory - Salesperson Assignments** checkbox is enabled. This option should only be

used when you have assigned salespeople to sales territories and you wish to allow/prevent the sales territory salespeople to receive commissions for customers in the selected range.

Mass Update Items
Sales Area Page >> Utilities >> Commission Plan >> Update Item Commission Plans

The Mass Update Items window allows you to quickly assign an Item Plan to a range of inventory items and to update commissionable amount information.

The **Items** drop-down list determines the field that will control the assignment and includes: by Item Number, by Description, by Class ID, by Short Description, and by Generic. The From and To fields are used for the range. Leaving the From field blank starts at the beginning of the database, and leaving the To field blank will ensure processing to the end of the database.

Mark the **Update Item Plan** checkbox to update the item plan for items in the selected range.

If the Sale Amount From is set to Based on Item in the Commission Plan Setup window, the **Update Commissionable Sale Amount** and **Update Commissionable Sale Amount Multiplier** checkboxes are enabled. If the Update Commissionable Sale Amount option is marked, the **Sale Amount From** option is enabled. If the Update Commissionable Sale Amount Multiplier option is marked, the **Sales Amount From - Multiplier** field is enabled.

If the Cost Amount From is set to Based on Item in the Commission Plan Setup window, the **Update Commissionable Cost Amount** and **Update Commissionable Cost Amount Multiplier** checkboxes are enabled. If the Update Commissionable Cost Amount option is marked, the **Cost Amount From** option is enabled. If the Update Commissionable Cost Amount Multiplier option is marked, the **Cost Amount From - Multiplier** field is enabled.

Commission Plan Example

The following scenario is used for demonstration purposes to help you understand how an actual commission plan is set up. This example uses the Dynamics GP sample company.

Scenario

Our company supplies computer hardware and software products to both retail and wholesale customers. We pay commissions to sales reps that sell to particular customers, and we have sales managers that receive commission on all items sold. Commissions are paid to the sales reps when the sales documents are posted, and commissions are paid to the sales managers when the sales documents are fully paid. We only want to track commissions for invoices and returns. Commissions are reduced for write-offs, and the commissions vary by the item sold and the customer to whom the item is sold. The following table displays the commission types and rates:

Salesperson Type	Customer Type	Item Type	Commission Type	Commission Rate
Rep	Wholesale	Hardware	Margin	7%
Rep	Wholesale	Software	Margin	5%
Rep	Retail	Hardware	Margin	10%
Rep	Retail	Software	Margin	8%
Manager	All types	All types	Sales	1%

Some of our large wholesale customers have a sales rep that handles only hardware sales and a sales rep that handles only software sales. An invoice may contain both hardware and software items, and we want to make sure we pay the correct sales rep for the appropriate items. In our scenario, salesperson Sandra Martinez is the sales manager and the salespeople attached to each customer are the sales reps. Customers Aaron Fitz Electrical and Adam Park Resort are wholesale customers and Advanced Paper Company is a retail customer. Inventory item 128 SDRAM is a hardware item and COMPBOOK is a software item. Adam Park Resort is our large wholesale customer. Salesperson Nancy Buchanan handles hardware sales for Adam Park Resort and Ian Marsh handles software sales.

In this commission example, we will NOT set up Commission Plan to create Microsoft Dynamics GP transactions.

Salesperson Commission Plan Setup

We need two Salesperson Plans, since we pay different commissions to different salespeople when a given item is sold to a given customer (reps get 7% of the margin and managers get 1% of the selling price when hardware items are sold to wholesale customers). We'll call the sales reps' Commission Plan - REPS and the managers' Commission Plan - MANAGERS.

Open the Salesperson Commission Plan Setup window (*Sales Area Page >> Setup >> Commission Plan >> Salesperson Commission Plan Setup*) and create the following records:

Salesperson Plan	Description
REPS	Sales Reps
MANAGERS	Sales Managers

Assign the MANAGERS plan to Sandra Martinez and the REPS plan to all other salespeople (See the Salesperson Commission Plan Setup section of this document).

Customer Commission Plan Setup

We need two Customer Plans, since we pay different commissions to a given salesperson when a given item is sold to different customers (reps get 7% of the margin when hardware items are sold to wholesale customers, but they get 10% of the margin when hardware items are sold to retail customers). We'll call

the wholesale customers' Commission Plan - WHOLESALE and the retail customers' Commission Plan - RETAIL.

Open the Customer Commission Plan Setup window (*Sales Area Page >> Setup >> Commission Plan >> Customer Commission Plan Setup*) and create the following records:

Customer Plan	Description
WHOLESALE	Wholesale Customers
RETAIL	Retail Customers

Assign the WHOLESALE plan to Aaron Fitz Electrical and Adam Park Resort and the RETAIL plan to Advanced Paper Company (See the Customer Commission Plan Setup section of this document).

Item Commission Plan Setup

We need two Item Plans, since we pay different commissions to a given salesperson when different items are sold to a given customer (reps get 7% of the margin when hardware items are sold to wholesale customers, but they get 5% of the margin when software items are sold to wholesale customers). We'll call the hardware items' Commission Plan - HARDWARE and the software items' Commission Plan - SOFTWARE.

Open the Item Commission Plan Setup window (*Sales Area Page >> Setup >> Commission Plan >> Item Commission Plan Setup*) and create the following records:

Item Plan	Description
HARDWARE	Hardware Items
SOFTWARE	Software Items

Assign the HARDWARE plan to item 128 SDRAM and the SOFTWARE plan to item COMPBOOK (See the Item Commission Plan Setup section of this document).

Commission Plan Setup

Since we can have multiple salespeople on an invoice who are commissioned for specific items, we will need to determine the salespeople to commission at the sales documents line item level.

Since commissions are paid to sales reps when sales documents are posted and paid to managers when sales documents are fully paid, we'll need to set up processing based on salesperson.

Open the Commission Plan Setup window (*Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup*) and enter the following:
- Commissionable Sales Documents: mark Invoices, Returns (default setup), mark the Disable Dynamics GP Commissions checkbox
- Commission Matrix Option: Standard
- Commissionable Amounts: From Sales Document Price & Sales Document Cost, both Multipliers = 100%
- Commission Reductions: Reduce Commissions For – Posted Sales Documents, Reduce Commissions How – Reduce Comm Sale, mark the Writeoffs checkbox
- Salespeople Receiving Commission: Salesperson may be commissioned multiple times per sales document – unmarked, Commission Which Sales Document Salespeople – Sales Document Line, Determine Additional Salespeople Using – Sales Document Line Info
- Commission Processing: Commission Recognition Date From – Sales Transaction Document Date, Enable Commission Processing When – Based on Salesperson, Returns Considered Paid When – Fully Applied, Next Commission Processing Run ID – COMMRUN00001, unmark all Create checkboxes.

Click Apply to save the setup.

Commission Plan Matrix Setup

We need to define the Commission Plan Matrix with the proper commission types and rates.

Open the Commission Plan Matrix Setup window (*Sales Area Page >> Setup >> Commission Plan >> Commission Plan Matrix Setup*) and enter the REPS Salesperson Plan. Enter each row from the following table into a row in the scrolling window:

Customer Plan	Item Plan	Commission Type	Commission Rate
Wholesale	Hardware	Margin	7%
Wholesale	Software	Margin	5%
Retail	Hardware	Margin	10%
Retail	Software	Margin	8%

Save the REPS Salesperson Plan. Enter the MANAGERS Salesperson Plan. Enter each row from the following table into a row in the scrolling window:

Customer Plan	Item Plan	Commission Type	Commission Rate
Wholesale	Hardware	Sale	1%
Wholesale	Software	Sale	1%
Retail	Hardware	Sale	1%
Retail	Software	Sale	1%

Save the MANAGERS Salesperson Plan.

Salesperson Commission Plan Info

Since Commission Plan is set up with the Enable Commission Processing - Based on Salesperson option, we must choose a processing option for each salesperson.

Open the Salesperson Commission Plan Info window (*Sales Area Page >> Cards >> Commission Plan >> Salesperson Commission Plan Info*). For each salesperson except Sandra Martinez, set the Enable Commission Processing When option to *Invoice is Posted*. For Sandra Martinez, set the Enable Commission Processing When option to *Invoice is Paid*.

[HINT: Open the Commission Plan Setup window (*Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup*) and set the Enable Commission Processing When option to *Invoice is Posted* and click OK. Now reopen the window and set the Enable Commission Processing When option to *Based on Salesperson* and click OK. By first saving the setup with the *Invoice is Posted* option then saving the setup with the *Based on Salesperson* option, we have set the option for each salesperson to *Invoice is Posted*. Now we only have to set the Enable Commission Processing When option to *Invoice is Paid* for Sandra Martinez, using the Salesperson Commission Plan Info window. This only works if you have already assigned Salesperson Plans to all salespeople.**]**

Customer - Salesperson Assignment

Open the Customer Maintenance window, and enter Customer ID ADAMPARK0001. Remove the Salesperson ID, as the salesperson for this customer depends on the type of item sold. Open the Customer Address Maintenance window and remove the Salesperson ID from each address for Adam Park Resort.

Enter Customer ID AARONFIT0001 in the Customer Maintenance window and assign Salesperson ID Paul W. Open the Customer Address Maintenance window and for each AARONFIT0001 address set the Salesperson ID to Paul W.

Enter Customer ID ADVANCED0001 in the Customer Maintenance window and assign Salesperson ID Paul W. Open the Customer Address Maintenance window and for each ADVANCED0001 address set the Salesperson ID to Paul W.

Customer Commission Plan Info

We need to attach our manager, Sandra Martinez, to each customer as an additional salesperson. We also need to attach our hardware and software sales reps to Adam Park Resort, our large wholesale customer.

Open the Customer Commission Plan Info window (*Sales Area Page >> Cards >> Commission Plan >> Customer Commission Plan Info*). For customers Aaron Fitz Electrical and Advanced Paper Company, enter Salesperson ID SANDRA M. Her Salesperson Plan of MANAGERS will default, along with a Split percent of 100%. Leave the Item Plan and Address Code fields blank and save the record.

For customer Adam Park Resort, enter Salesperson ID SANDRA M; her Salesperson Plan of MANAGERS and Split of 100% will default. Leave the Item Plan and Address Code fields blank. Enter Salesperson ID NANCY B; her Salesperson Plan of REPS and Split of 100% will default. Enter HARDWARE in the Item Plan field and leave the Address Code field blank. Enter Salesperson ID IAN M; his Salesperson Plan of REPS and Split of 100% will default. Enter SOFTWARE in the Item Plan field and leave the Address Code field blank. Save the record.

CONGRATULATIONS – Commission Plan is now ready for use!

Create Commissions

Now we'll create sales documents for our three Commission Plan customers.

Open the Sales Transaction Entry window. Enter and create invoices with line items 128 SDRAM and COMPBOOK for Aaron Fitz Electrical, Adam Park Resort, and Advanced Paper Company.

Open the invoice for Aaron Fitz Electrical and open the Commission Plan Entry window using the Additional menu, the hotkey CTRL + M (or the Commission Plan button if using EthoTech's alternate Sales Transaction Entry window). You should see commission records for Paul W and Sandra M. Open the Commission Plan Detail Entry window: Paul W should have received a commission of 7% of the margin for item 128 SDRAM and 5% of the margin for item COMPBOOK, and Sandra M should have received a commission of 1% of the sale amount for each item.

Open the invoice for Adam Park Resort and open the Commission Plan Entry window. You should see commission records for Ian M, Nancy B, and Sandra M. Open the Commission Plan Detail Entry window: Ian M should have received a commission of 5% of the margin for item COMPBOOK, Nancy B should have received a commission of 7% of the margin for item 128 SDRAM, and Sandra M should have received a commission of 1% of the sale amount for each item.

Open the invoice for Advanced Paper Company and open the Commission Plan Entry window. You should see commission records for Paul W and Sandra M. Open the Commission Plan Detail Entry window: Paul W should have received a commission of 10% of the margin for item 128 SDRAM and 8% of the margin for item COMPBOOK and Sandra M should have received a commission of 1% of the sale for each item.

Post these sales documents.

Verify Commission Status

At this point, commission records for Ian M, Nancy B, and Paul W are ready for processing. Sandra M's commissions are not ready for processing since the sales documents have not been paid. Run commission reports to verify the commission statuses.

Open the Commission Plan Report window (*Sales Area Page >> Reports >> Commission Plan >> Commission Plan Report*). Print the report with only the *Posted Documents – Ready for Processing* and *Documents with a zero commission amount* checkboxes marked; the commission records for Ian M, Nancy B, and Paul W should display. Now print the report with only the *Posted Documents - Not Ready for Processing* and *Documents with a zero commission amount* checkboxes marked; the commission records for Sandra M should display.

Reduce Commissions for Write-offs

In this step, we'll pay the invoice for Aaron Fitz Electrical and write off part of the invoice. This will result in a reduction in commissions for Paul W and Sandra M for the invoice.

Open the Cash Receipts Entry window. Enter a cash receipt for Aaron Fitz Electrical with an Amount that is $10.00 less than the amount of the invoice we created earlier. Apply the cash receipt to the invoice and enter $10.00 in the Writeoffs field. Save or post the cash receipt.

Open the Commission Plan Report window (*Sales Area Page >> Reports >> Commission Plan >> Commission Plan Report*). Print the report with only the *Posted Documents - Ready for Processing* and *Documents with a zero commission amount* checkboxes marked; the commission records for Ian M, Nancy B, and Paul W should display. The commission record for Sandra M should display for the Aaron Fitz Electrical invoice, but not for the Adam Park Resort or Advanced Paper Company invoices since they have not yet been paid. Note that the commissions for Paul W and Sandra M for the Aaron Fitz invoice have been reduced after applying the write-off.

To view the commission discount for the writeoff, open the Commission Plan Entry window (*Sales Area Page >> Transactions >> Commission Plan >> Commission Plan Entry*) for the Aaron Fitz Electrical invoice, then open the Commission Plan Detail Entry window for Paul W: the commissionable sale amount is less than the extended sale amount. Click the Commission Trace expansion window to open the Commission Line Trace window: the reduction is displayed in the Commissionable Sale Amount section (see the Commission Reductions section of this document for details on how reductions are calculated).

Process Commissions

It's now the end of the month and it's time to pay commissions to our salespeople. Remember, the sales reps will be paid on all posted documents and the sales manager will be paid on all paid documents.

Open the Process Commissions window (*Sales Area Page >> Routines >> Commission Plan >> Process Commissions*). Select the Preview button to view an edit list of the commissions to be paid. Note that Sandra M will not receive commissions for the Adam Park Resort or Advanced Paper Company invoices since they have not yet been paid. If any commissions are incorrect, open the Commission Plan Entry window (*Sales Area Page >> Transactions >> Commission Plan >> Commission Plan Entry*) for the document and edit the commissions. When the edit report displays the correct commission amounts, enter today's date in the Date Commissions Paid field on the Process Commissions window and select the Process button. A processed commissions report will print which you can use to enter Payroll or Payables transactions, since we did not set up Commission Plan to create Microsoft Dynamics GP transactions.

Please note that processed commissions may not be modified. This means that if you write off portions of the Adam Park Resort or Advanced Paper Company invoices, commissions for Ian M, Nancy B, and Paul W will not be reduced. However, the commissions for Sandra M will be reduced since they have not been processed.

Commission Run Inquiry

Open the Commission Run Inquiry window (*Sales Area Page >> Inquiry >> Commission Plan >> Commission Run Inquiry)* to view summary data for the commission run. Click the Salesperson Commission Run Inquiry expansion button to view salesperson summary data for the commission run.

Troubleshooting

Commission Calculations

Problem:
When testing in the Microsoft Dynamics GP sample company, the Salesperson ID field is blank in the Commission Plan Entry window, even though I've set up Commission Plan correctly.
Solution:
Since all EthoTech modules (except Enhanced Password Security) are registered in the Microsoft Dynamics GP sample company, Commission Plan is relying on the Salesperson By Ship To feature of EthoTech's Salesperson Enhancements module to enter the correct salesperson on the sales document. Since salespeople have not been assigned to customer addresses, Salesperson By Ship To enters a blank Salesperson ID for the sales document. Use either of the following options to resolve the issue for future sales documents:

- Open the Customer Address Salesperson Utilities (*Sales Area Page >> Utilities >> Salesperson Enhancements >> Customer Address Salesperson Utilities*) and select Process. This will add the salesperson on the customer card to each customer address and Commission Plan will function correctly.
- Open the Salesperson Enhancements Setup window *(Sales Area Page >> Setup >> Salesperson Enhancements >> Salesperson Enhancements Setup)*, mark the Disable Salesperson By Ship To option, and click the Apply button.

You'll need to manually add the correct Salesperson ID to existing sales documents / sales document line items.

Problem:
The Salesperson Plan field is blank in the Commission Plan Entry window and the commission amount is zero.
Solution:
Add a Salesperson Plan to the salesperson (see the Salesperson Commission Plan Setup section of this document) and then select the Default button on the Commission Plan Entry window to recalculate the commission.

Problem:
The Salesperson Plan, Customer Plan, and Item Plans are not blank, but the Commission Type is set to No Commission and the commission amount is zero.
Solution:
No valid combination of the Salesperson, Customer, and Item Plans exists in the Commission Plan Matrix (see the Commission Plan Matrix Setup section in the document), so by default Commission Plan assigns a Commission Type of No Commission. You can either manually edit the commission if a commission should be paid or set up a valid plan combination in the Commission Plan Matrix Setup window.

Problem:
I used the Commission Plan Utilities window to create commissions for historical sales documents, but many of them were assigned zero commissions.
Solution:
Check your setups to ensure that customers are assigned to the correct Customer Plans, items are assigned to the correct Item Plans, and salespeople are assigned to the correct Salesperson Plans.

Verify that the Commission Plan Matrix is set up correctly. Then use the Commission Plan Utilities window with the Delete and Recreate Commissions checkbox marked to recalculate the commissions.

Problem:
I recently created a new salesperson, customer, or inventory item and commissions are not calculating for the salesperson, customer, or item.
Solution:
A Salesperson, Customer, or Item Plan was not assigned when the new salesperson, customer, or inventory item was created. Assign the proper Salesperson, Customer, or Item Plan and recalculate commissions using either the Default button on the Commission Plan Entry window (if you only have a few commissions to correct) or the Commission Plan Utility window with the Delete and Recreate Commissions checkbox marked (if you have a large number of commissions to correct). Mark the Require Salesperson Plans, Require Customer Plans, and Require Item Plans checkboxes in the Commission Plan Setup window to avoid this problem in the future (see the Commission Plan Setup section in the document).

Problem:
I changed setup options in the Commission Plan Setup window, but when I delete and recreate commissions for a sales document, the commissions don't reflect the setup changes.
Solution:
There are two possibilities for this problem occurring:

- You're using either the Commission Plan Entry or the Commission Plan Utilities window to delete and recreate commissions, and the window was open when you made the changes to the Commission Plan Setup window. Close and reopen the Commission Plan Entry or Commission Plan Utilities window, then delete and recreate commissions again - the setup changes should now be reflected in the commissions.
- Some commissions have already been processed for the sales document, so all commissions for the document will continue to use the old setup option. You'll need to manually edit the unprocessed commissions for the document.

Dynamics GP Customer Combiner & Modifier
Sales Area Page >> Utilities >> Customer Combiner & Modifier

Overview
Dynamics GP includes the ability to combine and modify customers:
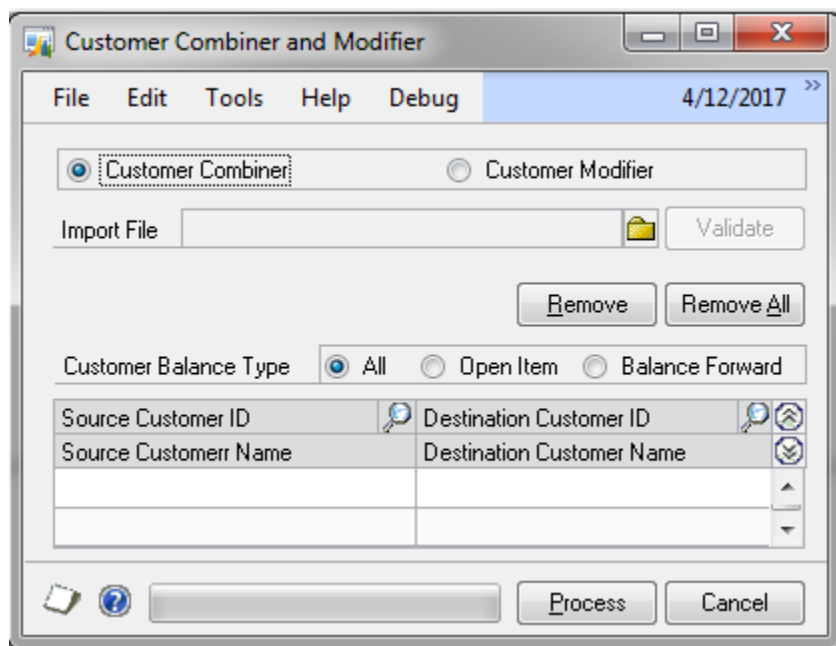
💡 *If you're using the Microsoft Professional Services Tools Library (PSTL) to combine or modify customers, please refer to the* [Commission Plan Support for Microsoft Professional Services Tools Library](#) *document.*

Table ASI28050 holds the customer plan > customer assignments, and table ASI28210 holds the salesperson > customer assignments. The Customer Commission Plan Info window can be used to view the customer plan and salesperson assignments for each customer.

When running the combiner utility to combine customers A & B into customer B, the utility fails if records for both customers exist in either table ASI28050 or table ASI28210.

When running the modifier utility to change customer number A to customer number B, the utility fails if records exist for both customers in table ASI28050 or table ASI28210.

The combiner and modifier utilities also fail if the Default checkbox is marked for a customer plan in the Customer Commission Plan Setup window.

For example, if customer A and customer B are combined into customer B and both customers have a Customer Plan assigned, the combiner utility will fail with error "Violation of PRIMARY KEY constraint PKASI28050. Cannot insert duplicate key in object dbo. ASI28050." This occurs because the utility finds every row in every table in the database containing value "A" in the CUSTNMBR column, changes the value to "B", and attempts to update each row. The utility fails because a row already exists in table ASI28050 with a value of "B" in the CUSTNMBR column, and the CUSTNMBR column is the primary key for the table - requiring the CUSTNMBR column to have a unique value for each row.

The combiner and modifier utilities include SQL stored procedures that run before the utility attempts to update the database. Logic may be added to these stored procedures to update tables so that the utility doesn't encounter a situation which would cause a failure. In our above example, we can alter the stored procedure to remove the Customer Plan assignment from customer A before the combiner utility attempts its updates.

These stored procedures exist in the company database, so if you use the utilities in multiple companies you'll need to alter the stored procedures in each database.

Typically, you'll only need to alter a stored procedure once, unless you upgrade to a new Dynamics GP version.

Alter SQL Stored Procedures

Customer Combiner:
Use the following steps to automatically remove the ASI28050 record for customer A and merge the salespeople for customers A & B before the combiner utility runs:

1. Open SQL Management Studio, expand the company database, expand Programmability, and expand Stored Procedures.

2. Right-click procedure **dbo.rmCustomerCombinerPre** and choose *Script Stored Procedure As > ALTER To > New Query Editor Window* (which creates a new script in the query editor window).
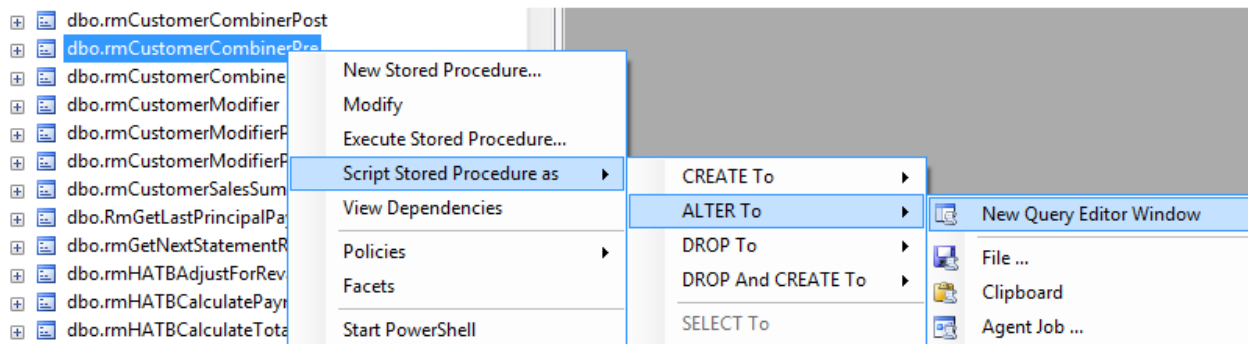
3. Find the following statement in the Alter procedure rmCustomerCombinerPre script that you created in step 2:
    select @O_iErrorState = 0

Screenshot of Alter procedure rmCustomerCombinerPre

```
/****** Object:  StoredProcedure [dbo].[rmCustomerCombinerPre]    Script Date: 11/01/2013 11:34:47 ******/
SET ANSI_NULLS ON
GO


SET QUOTED_IDENTIFIER OFF
GO

 ALTER procedure [dbo].[rmCustomerCombinerPre]
 @I_charStartCustomer  char(30) output,
 @I_charEndCustomer  char(30) output,
 @cStartCustomer  char(50) output,
 @cEndCustomer char(50) output,
 @O_iErrorState   int output

 as select @O_iErrorState = 0

 return
 GO
```

4. Just after the *select @O_iErrorState = 0* statement, add the following statements:

```
-- Commission Plan: if a customer plan exists for both the source and destination customers, remove
the customer plan from the source customer.
IF (SELECT COUNT(*) FROM ASI28050 WHERE CUSTNMBR = @I_charStartCustomer) > 0 AND
(SELECT COUNT(*) FROM ASI28050 WHERE CUSTNMBR = @I_charEndCustomer) > 0
  DELETE ASI28050 WHERE CUSTNMBR = @I_charStartCustomer

-- Commission Plan: if salespeople have been assigned to the source customer, merge them with the
salespeople assigned to the destination customer.
-- If both customers currently have salespeople assigned, the salespeople assigned to the destination
customer will be the currently assigned salespeople for the combined customer.
IF (SELECT COUNT(*) FROM ASI28210 WHERE CUSTNMBR = @I_charStartCustomer) > 0
BEGIN
  DECLARE @NextIdx INT, @CountIdxStartCust INT, @CountIdxEndCust INT, @i INT
  SET @NextIdx = ISNULL((SELECT MAX(ETI_CP_Cust_SP_Index) FROM ASI28210 WHERE
CUSTNMBR = @I_charStartCustomer OR CUSTNMBR = @I_charEndCustomer),0)
  SET @CountIdxStartCust = ISNULL((SELECT MAX(ETI_CP_Cust_SP_Index) FROM ASI28210
WHERE CUSTNMBR = @I_charStartCustomer), 0)
  SET @CountIdxEndCust = ISNULL((SELECT MAX(ETI_CP_Cust_SP_Index) FROM ASI28210
WHERE CUSTNMBR = @I_charEndCustomer), 0)

  SET @i = 1
  WHILE (@i <= @CountIdxStartCust)
  BEGIN
    IF (SELECT COUNT(*) FROM ASI28210 WHERE CUSTNMBR = @I_charStartCustomer AND
ETI_CP_Cust_SP_Index = @i) > 0
    BEGIN
      SET @NextIdx = @NextIdx + 1
      UPDATE ASI28210 SET CUSTNMBR = @I_charEndCustomer, ETI_CP_Cust_SP_Index =
@NextIdx WHERE CUSTNMBR = @I_charStartCustomer AND ETI_CP_Cust_SP_Index = @i
      UPDATE ETI28910 SET CUSTNMBR = @I_charEndCustomer, ETI_CP_Cust_SP_Index =
@NextIdx WHERE CUSTNMBR = @I_charStartCustomer AND ETI_CP_Cust_SP_Index = @i
    END
    SET @i = @i + 1
  END

  SET @i = 1
  WHILE (@i <= @CountIdxEndCust)
```

```
    BEGIN
      IF (SELECT COUNT(*) FROM ASI28210 WHERE CUSTNMBR = @I_charEndCustomer AND
ETI_CP_Cust_SP_Index = @i) > 0
      BEGIN
        SET @NextIdx = @NextIdx + 1
        UPDATE ASI28210 SET ETI_CP_Cust_SP_Index = @NextIdx WHERE CUSTNMBR =
@I_charEndCustomer AND ETI_CP_Cust_SP_Index = @i
        UPDATE ETI28910 SET ETI_CP_Cust_SP_Index = @NextIdx WHERE CUSTNMBR =
@I_charEndCustomer AND ETI_CP_Cust_SP_Index = @i
      END
      SET @i = @i + 1
    END
END
```

5. Run the script, which will recreate the rmCustomerCombinerPre stored procedure with the Commission Plan logic.

Customer Modifier:
Use the following steps to automatically remove the ASI28050 and ASI28210 records for customer number B before the modifier utility runs:

1. Open SQL Management Studio, expand the company database, expand Programmability, and expand Stored Procedures.

2. Right-click procedure **dbo.rmCustomerModifierPre** and choose _Script Stored Procedure As > ALTER To > New Query Editor Window_ (which creates a new script in the query editor window).
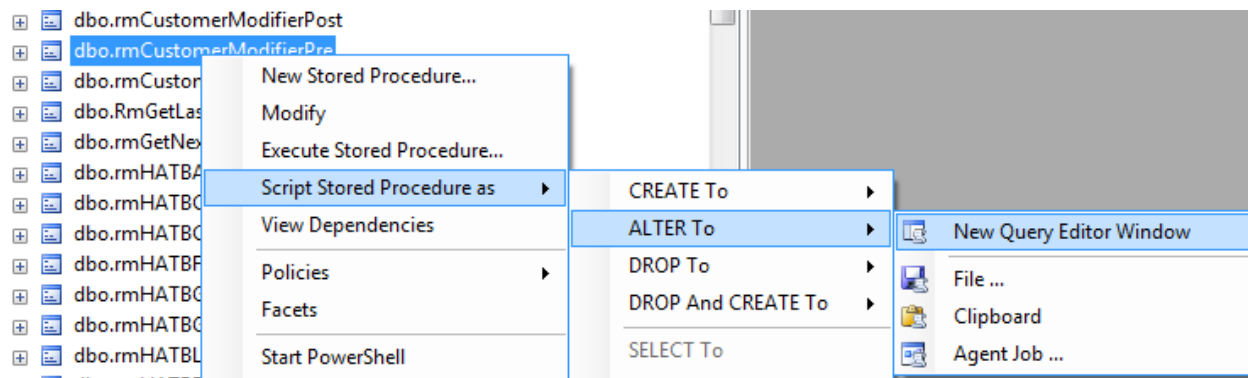
3. Find the following statement in the Alter procedure rmCustomerModifierPre script that you created in step 2:

   select @O_iErrorState = 0

Screenshot of Alter procedure rmCustomerModifierPre

```
/****** Object:  StoredProcedure [dbo].[rmCustomerModifierPre]    Script Date: 11/01/2013 12:30:34 ******/
SET ANSI_NULLS ON
GO

SET QUOTED_IDENTIFIER OFF
GO

 ALTER procedure [dbo].[rmCustomerModifierPre]
 @I_charStartCustomer   char(30) output,
 @I_charEndCustomer   char(30) output,
 @cStartCustomer   char(50) output,
 @cEndCustomer char(50) output,
 @O_iErrorState    int output

 as select @O_iErrorState = 0                                                I

 return
GO
```

4. Just after the *select @O_iErrorState = 0* statement, add the following statements:

    -- Commission Plan: if a customer plan exists for both the source and destination customers, remove
    the customer plan from the destination customer.
    IF (SELECT COUNT(*) FROM ASI28050 WHERE CUSTNMBR = @I_charStartCustomer) > 0 AND
    (SELECT COUNT(*) FROM ASI28050 WHERE CUSTNMBR = @I_charEndCustomer) > 0
      DELETE ASI28050 WHERE CUSTNMBR = @I_charEndCustomer

    -- Commission Plan: if salespeople have been assigned to both the source and destination
    customers, remove the salesperson assignments from the destination customer.
    IF (SELECT COUNT(*) FROM ASI28210 WHERE CUSTNMBR = @I_charStartCustomer) > 0 AND
    (SELECT COUNT(*) FROM ASI28210 WHERE CUSTNMBR = @I_charEndCustomer) > 0
      DELETE ASI28210 WHERE CUSTNMBR = @I_charEndCustomer

5. Run the script, which will recreate the rmCustomerModifierPre stored procedure with the Commission
    Plan logic.

Before Each Customer Combiner or Modifier Run
Before running the combiner or modifier utility, use the Customer Commission Plan Setup window to
ensure that no customer plan has the Default checkbox marked. If a customer plan is marked as Default,
unmark the checkbox and save the record.
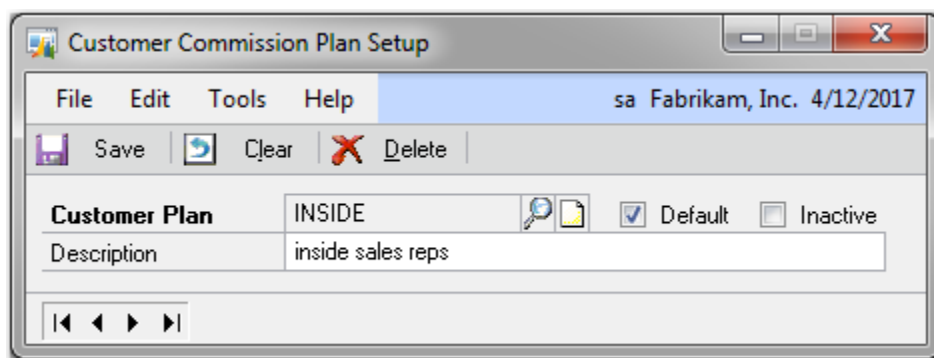
After the utility completes, mark the Default checkbox for the desired customer plan and save the record.

Customer Service Collection

EthoTech Customer Service Collection extends Microsoft Dynamics GP Sales Order Processing by giving you the ability to: add additional Sales Transaction Entry fields, determine which checks were applied to a specific SOP invoice or return, check for duplicate purchase orders, automatically assign credit limit process holds, move multiple sales documents between batches, print shipping labels, automatically add restocking charges for returns, track unallocated inventory quantities and track expected receipt dates.

Security

This module includes the following default roles:
- ETI CSC USER
- ETI CSC MANAGER
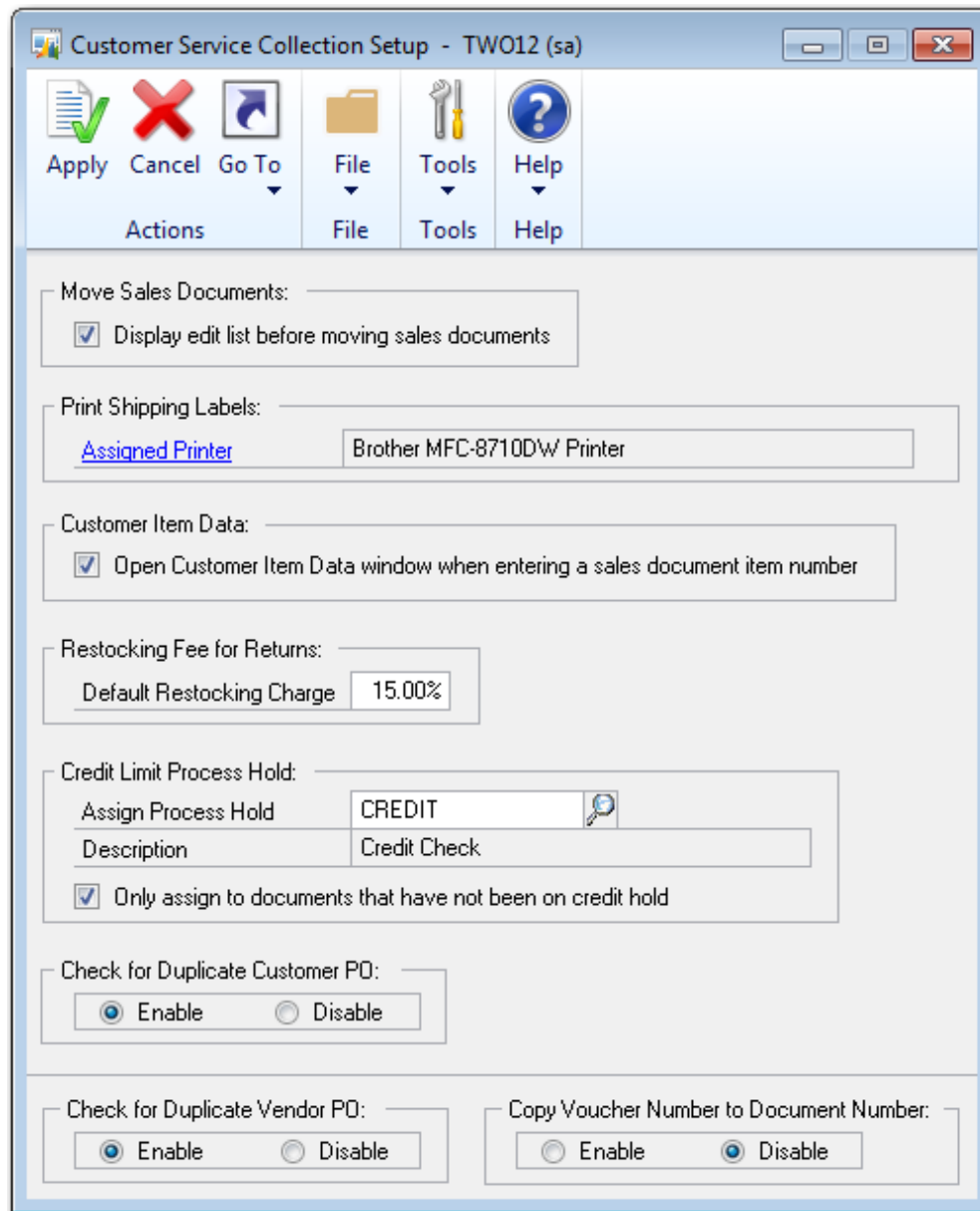
The ETI CSC USER role grants access to all EthoSeries windows, reports, and files required to perform the various functions within the module. This role should be assigned to all users should have access to Customer Service Collection functionality.

The ETI CSC MANAGER role grants access to the Customer Service Collection setup windows. This role should be assigned to all users who may modify Customer Service Collection setup options.

This module uses EthoSeries and Alternate Dynamics GP windows – each created by EthoTech. EthoSeries windows are automatically assigned to your Dynamics GP navigation during installation. Alternate Dynamics GP windows designed by EthoTech need to be granted security access in order to be utilized. Use the Microsoft Dynamics GP Security windows to grant – or remove – access to EthoSeries and Alternate Dynamics GP windows.

EthoSeries Windows
- Customer Service Collection Setup

Refer to the EthoSeries Windows and Alternate Dynamics GP Windows sections for a list of the windows used by each feature in Customer Service Collection.

Additional Sales Transaction Entry Fields

For customer service and data entry personnel, Additional Sale Transaction Fields provides the ability to display additional Inventory fields for each line item on the Sales Transaction Entry window.

EthoSeries Windows
There are no EthoSeries windows for this Customer Service Collection feature.

Alternate Dynamics GP Windows

Series	Window Name	Required
Sales	Sales Transaction Entry	Required

Module Setup

Dynamics GP Modifier
This module requires the use of the Modifier in order to display the Additional Sales Transaction Entry Fields.

1. Select *Microsoft Dynamics GP >> Tools >> Customize >> Modifier* to open the Modifier.

2. Select The EthoSeries as the product.

3. Select the New button to open the list of available windows.

4. Select the window SOP_Entry, which is the Sales Transaction Entry window.

5. Open the SOP_Entry window by selecting the Open button.

6. Double click on the scrolling window Line_Scroll.

7. From the Layout menu, make sure that Show Field Names and Show Invisible Fields are both selected with a check mark next to each one.

8. Move the fields of your choice from below the scrolling window, into the scrolling window. You may have to either add additional lines or resize some of the existing fields.

9. Save your changes, then return to Dynamics GP.

10. Assign security as above, but this time assign security to the Modified Alternate Dynamics GP Window.

The fields you may add to the scrolling window are listed below.

*   QTY On Hand

*   QTY On Order

*   QTY Available

*   QTY Allocated

*   ASI QTY Unallocated

*   ASI Net Quantity Available

*   ASI Expected Receipt Date

Using Additional Sales Transaction Entry Fields
Use Sales Transaction Entry as usual; you should now see the fields you added with the Modifier.

Apply Button for Sales Order Processing Inquiry

Apply Button for Sales Order Processing Inquiry makes it possible to determine which checks were applied to a specific SOP invoice. This module also works for SOP returns.

EthoSeries Windows
There are no EthoSeries windows for this Customer Service Collection feature.

Alternate Dynamics GP Windows

Series	Window Name	Required
Sales	Sales Transaction Inquiry Zoom	Optional

Module Setup
Apply Button for Sales Order Processing Inquiry does not require any setup procedures other than installation and registration.

Using Apply Button for Sales Order Processing Inquiry
Use Dynamics GP as usual. In Sales Transaction Inquiry Zoom, you may select the Apply button, the hotkey CTRL + A, or *Additional >> Apply Documents* to determine what check paid the invoice in question or to determine to which document(s) the return in question was applied.

Copy Voucher Number to Document Number in Payables

While entering a new document in Payables Transaction Entry, the voucher number will be copied to the document number. This prevents the user from determining a unique document number if the vendor has not already supplied a document number.

EthoSeries Windows
- Customer Service Collection Setup

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows
There are no Alternate Dynamics GP windows for this Customer Service Collection feature.

Module Setup
Open the Customer Service Collection Setup window (*Sales Area Page >> Setup > Customer Service Collection >> Customer Service Collection Setup*) and choose **Enable** in the **Copy Voucher Number to Document Number** section.

Copy Voucher Number to Document Number in Payables
Use the Application as usual. When entering a new document in the Payables Transaction Entry window, the voucher number will be copied to the document number. The document number may be overridden by the user.

Check for Duplicate Purchase Orders in Sales Order Processing

While entering a document in Sales Transaction Entry, history and unposted documents will be checked for an identical Purchase Order for the given Customer ID. This module will reduce the likelihood of double shipments and assist you in improving customer service.

EthoSeries Windows
- Customer Service Collection Setup

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows
There are no Alternate Dynamics GP windows for this Customer Service Collection feature.

Module Setup

Open the Customer Service Collection Setup window (*Sales Area Page >> Setup > Customer Service Collection >> Customer Service Collection Setup*) and choose **Enable** in the **Check for Duplicate Customer PO** section.

Using Check for Duplicate Sales Order Processing Purchase Orders

Use the Application as usual. When entering a purchase order in the Customer PO Number field on the Sales Transaction Entry or Sales Customer Detail Entry window, Check for Duplicate Purchase Orders will automatically notify you if you have entered a duplicate purchase order for the Customer ID entered.

*Please note the Customer ID and Customer PO Number must match **exactly** for a duplicate to be identified.*

Once a duplicate purchase order is identified, you have the options to:

1. Open Inquiry - will open the Sales Order Processing Document Inquiry window, so that you may determine whether this transaction should be continued or not.

2. Continue - will allow you to continue processing the transaction even though a duplicate purchase order has been located.

3. Delete - will allow you to delete or void the transaction.
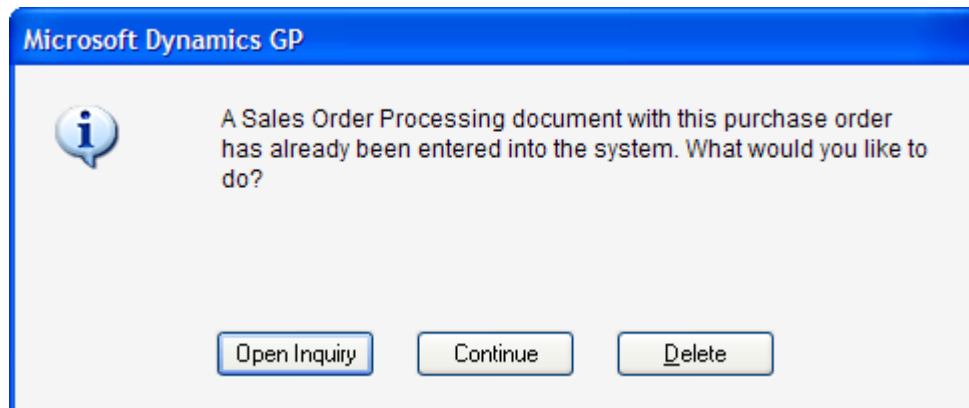
Check for Duplicate Purchase Orders in Payables

While entering a document in Payables Transaction Entry, history and unposted documents will be checked for an identical Purchase Order. This module will reduce the likelihood of making double payments to vendors.

EthoSeries Windows

*   Customer Service Collection Setup

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows

There are no Alternate Dynamics GP windows for this Customer Service Collection feature.

Module Setup

Open the Customer Service Collection Setup window (*Sales Area Page >> Setup > Customer Service Collection >> Customer Service Collection Setup*) and choose **Enable** in the **Check for Duplicate Vendor PO** section.

Using Check for Duplicate Payables Purchase Orders

Use the Application as usual. When entering a purchase order in the PO Number field on the Payables Transaction Entry or window, Check for Duplicate Purchase Orders will automatically notify you if you have entered a duplicate purchase order.

*Please note the PO Number must match **exactly** for a duplicate to be identified.*

Once a duplicate purchase order is identified, you have the options to:

1. Open Inquiry - will open the Payables Transaction Inquiry - Document window, so that you may determine whether this transaction should be continued or not.

2. Continue - will allow you to continue processing the transaction even though a duplicate purchase order has been located.

3. Delete - will allow you to delete or void the transaction.
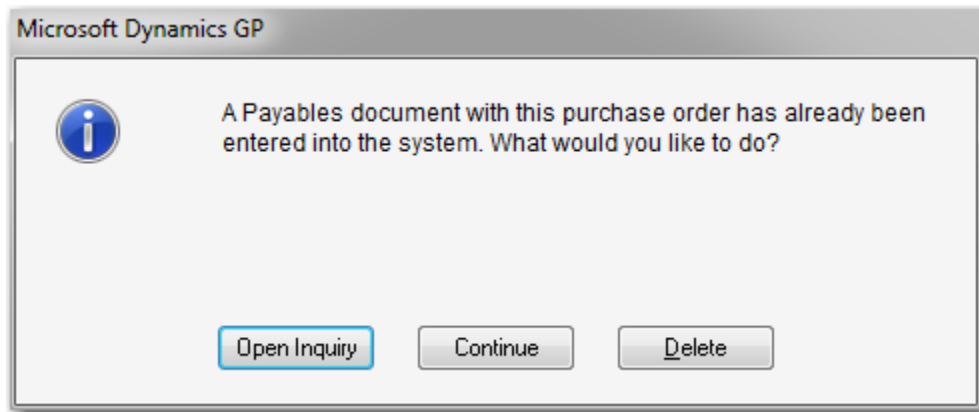
Credit Limit Process Holds

Whenever a document exceeds a customer's credit limit, Credit Limit Process Holds will automatically assign a process hold to the sales document. This module adds the power of Microsoft Dynamics GP Process Holds to credit management.

EthoSeries Windows

- Customer Service Collection Setup

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows

There are no alternate Dynamics GP windows for this Customer Service Collection feature.

Module Setup
Open the Open the Customer Service Collection Setup window (*Sales Area Page >> Setup > Customer Service Collection >> Customer Service Collection Setup*).

1. Enter the Process Hold ID that represents your company's Credit Process Hold.

2. The check box for "Only assign to documents that have not been on credit hold" allows you to only place a document on credit hold once. Any changes to a document that increases the amount owed by the customer for a particular sales document will place the document on credit hold again, unless this check box is selected.

3. For optimal processing, it is usually recommended – but not required – that Receivables Credit Limit Password be turned off, thereby removing the password requirement since the Microsoft Dynamics GP Process Hold will now be in effect in SOP for customers that exceed their credit limit.

The Credit Limit Process Hold is now active. All Sales Documents that are entered that exceed a customer's credit limit will be assigned to the appropriate Microsoft Dynamics GP Process Hold. Please refer to your Microsoft Dynamics GP Sales Order Processing documentation for more information on utilizing the Process Hold feature.

Using Credit Limit Process Hold
Use the Application as usual. In Sales Transaction Entry, when a transaction exceeds the customer's credit limit, a warning message will appear. If you decide to proceed with the transaction, your credit limit process hold will be assigned automatically.

Microsoft Dynamics GP credit limit process hold functionality is suppressed when EthoTech's Credit Limit Process Hold module is enabled.

Using EthoTech's Credit Limit Process Hold functionality provides the following benefits.
*   You can see the process hold as soon as it is calculated at the line item level rather than after the sales document is saved.
*   You are not required to remove the credit limit password, which provides increased security as removing this password in Microsoft Dynamics GP affects your Receivables Management module as well.
*   You can choose to only assign process holds to documents that have not been on credit hold. For example, after removing a credit limit process hold, adding additional line items to a sales document that place the customer over their credit limit again, will not reassign the credit process hold. This feature can be turned on or off.

Customer Item Data

When editing a document in the Sales Transaction Entry window, the Customer Item Data window displays the most recent purchase history for the current customer – item number combinations.

EthoSeries Windows
*   Customer Item Data
*   Customer Service Collection Setup

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows
There are no alternate Dynamics GP windows for this Customer Service Collection feature.

Module Setup

Open the Open the Customer Service Collection Setup window (*Sales Area Page >> Setup > Customer Service Collection >> Customer Service Collection Setup*).

The Customer Item Data window can be opened via the Additional menu from the Sales Transaction Entry window.

If you mark the "Open Customer Item Data window when entering a sales document item number", the Customer Item Data will automatically open when you tab off the Item Number field in the Sales Transaction Entry window after entering an item number.

Using Customer Item Data

In Sales Transaction Entry, open the Customer Item Data window (*Additional >> Customer Item Data or hotkey CTRL-U*) for the current customer – item combination:

The current sales document line item information appears at the top, followed by the customer item number and description. The bottom of the window displays the most recent posted sales invoice that contains the item number (Functional currency), followed by the most recent posted sales invoice that

was created in the same originating currency as the current document and that contains the item number (Originating currency).

If the current sales document was created in your system's functional currency, the originating currency information will not be displayed.

The most recent posted sales invoice is determined using the Document Date of each invoice.

Move Sales Documents

Move Sales Documents will move multiple sales documents from one batch to another batch based on a particular set of restrictions you define. This module is especially useful for customers with multiple people performing data entry duties. There are 14 available restriction types, which include: Master Number, Item Number, Document Type, Type ID, Document Number, Document Date, Customer ID, Customer Name, Phone Number, Quote Exp Date, Requested Ship Date, Salesperson ID, User Defined List 1, and Commitment Status.

EthoSeries Windows

- Move Sales Documents

Refer to [Appendix A](#) for details on locating EthoSeries windows in Microsoft Dynamics GP.

Alternate Dynamics GP Windows

There are no alternate Dynamics GP windows for this Customer Service Collection feature.

Module Setup
Move Sales Documents does not require any additional setup procedures.
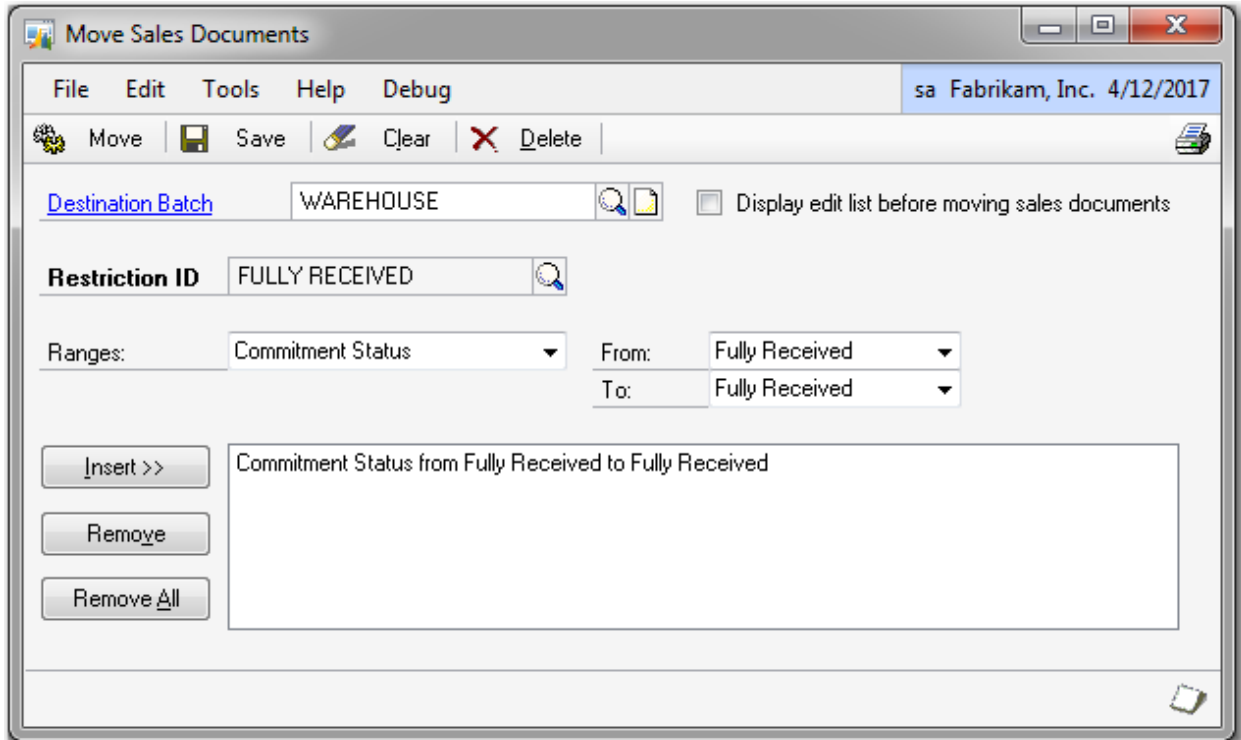
Using Move Sales Documents
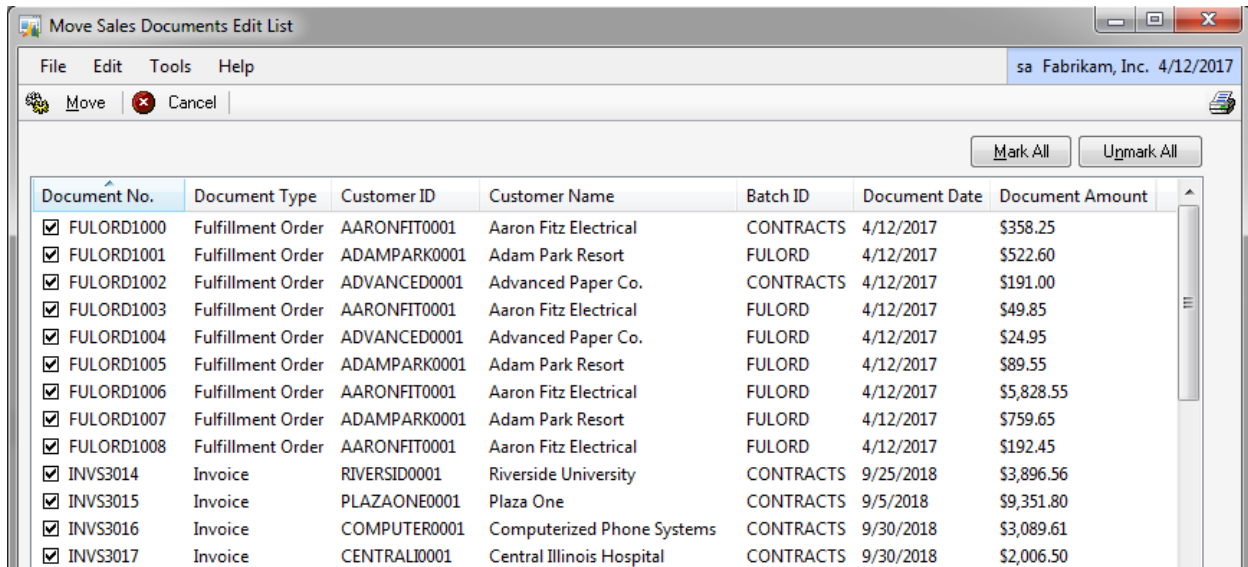
1. Open the Move Sales Documents window *(Sales Area Page >> Utilities >> Customer Service Collection >> Move Sales Documents*).

2. Select the destination Sales Order Processing Batch.

3. Enter at least one document range restriction. You may enter one range for each of the 15 available restriction types.

4. Select the Print icon 🖨 to view a preview report based on your range restrictions.

5. Select **Move** to move the sales documents.

6. After the move process has completed, a report will print displaying a success/failure status per document.

> 💡 *While it is not necessary to use Restriction IDs, if you repeatedly move sales documents based on a particular set of restrictions you may want to assign the restriction set to a Restriction ID and use that Restriction ID to automatically insert the restriction set.*

[HINT: To quickly move documents based on the document type, insert the desired document type restriction, and select Move. To move all documents, leave the From field blank and select Back Order in the To field.**]**

If you wish to further restrict the documents to be moved, mark the **Display edit list before moving sales documents** checkbox. The Move button will be replaced with an **Edit List** button. Select Edit List to open the Move Sales Documents Edit List window.

Using Move Sales Documents Edit List

1. The Move Sales Documents Edit window will initial display with all documents marked. Unmark the documents you don't wish to move. You can select multiple documents by holding down the Shift or Ctrl button on your keyboard.

2. Select the Print icon 🖨 to view a preview report of the documents to be moved.

3. Select **Move** to move the sales documents.

4. After the move process has completed, a report will print displaying a success/failure status per document.

[HINT: If you always want the Edit List window to be displayed before documents are moved, mark the *Display edit list before moving sales documents* checkbox on the Customer Service Collection Setup window. When the Move Sales Documents window is opened, the *Display edit list before moving sales documents* checkbox will be marked.**]**

Print Shipping Labels

This module provides a way for you to print shipping labels quickly and easily from the Sales Transaction Entry and Sales Order Fulfillment windows.

EthoSeries Windows

- Customer Service Collection Setup

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows

Series	Window Name	Required
Sales	Sales Transaction Entry	Optional
Sales	Sales Order Fulfillment	Optional

Module Setup

1. Open the Open the Customer Service Collection Setup window (*Sales Area Page >> Setup > Customer Service Collection >> Customer Service Collection Setup*).

2. Select the default printer, including printer settings, to use for printing your shipping labels.

Using Print Shipping Labels

The name of the report used by the Print Shipping Labels product is **ASI Shipping Label**. Customize this label to your needs to match the format of your labels.

From Sales Transaction Entry and/or Sales Order Fulfillment select an existing document then the **Labels** button, the hotkey CTRL + B, or *Additional >> Print Shipping Labels*. Enter the number of labels desired. The default printer from Customer Service Collection Setup will be displayed, and you can override the default printer for a particular label run.

Restocking Charge Button for Returns

This module makes it easy for your company to establish and implement a policy on a restocking charge percentage for Sales Order Processing returns. Restocking Charge Button for Returns will ease data entry, reduce errors, and improve efficiency.

EthoSeries Windows

- Customer Service Collection Setup

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows

Series	Window Name	Required
Sales	Sales Transaction Entry	Optional

Module Setup

1. Open the Open the Customer Service Collection Setup window (*Sales Area Page >> Setup > Customer Service Collection >> Customer Service Collection Setup*).

2. Enter the default restocking charge percentage for return document types.

Using Restocking Charge Button for Returns

In the Sales Transaction Entry window, select the **Restock** button, the hotkey CTRL + F, or *Additional >> Restocking Fee for Returns*, which will be active only when you are processing a Return document. By selecting the button, hotkey, or Additional menu item, the restocking charge percentage will be applied to the return and placed in the trade discount field.

Track Expected Receipt Date

This module permits a more "up-to-the-minute" tracking of inventories. If your company needs to know when an item on a purchase order will be received in inventory, Track Expected Receipt Date will track this information for every item and location. This module can be used with EthoTech's *Additional Sales Transaction Entry Fields*.

EthoSeries Windows

- Expected Receipt Date Utilities

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows

Series	Window Name	Required
Inventory	Item Inquiry	Optional
Inventory	Item Quantities Maintenance	Optional

Module Setup

No setup is required for this module.

Purchasing Item Detail Entry
Enter the Expected Receipt Date into the Dynamics GP field: Promised Date. This date will be the Expected Receipt Date. Track Expected Receipt Date will evaluate all open Dynamics GP Purchase Orders to determine which PO contains the earliest Expected Receipt Date.

Expected receipt dates may be viewed using any of the following EthoSeries Alternate Dynamics GP windows:

Item Inquiry

1. Open the Item Inquiry window (*Inventory Area Page >> Inquiry >> Item*).

2. Select an item to inquire upon.

3. In the left-hand column, the Expected Date has been added near the bottom.

Item Quantities Maintenance

1. Open the Item Quantities Maintenance window (*Inventory Area Page >> Cards >> Quantities/Sites*).

2. Select an item to inquire upon.

3. In the left-hand column, the Expected Date has been added near the bottom.

Sales Transaction Entry

1. Open the Sales Transaction Entry window (*Sales Area Page >> Transactions >> Sales Transaction Entry*).

2. When displaying line items with the Show Details option, the Expected Receipt Date will now be displayed.

Track Unallocated Quantities

This module provides you with the ability to track inventory quantities before running out of stock. If you do not automatically allocate inventory to orders upon data entry, Track Unallocated Quantities will track the total quantity on order but not allocated. This module can be used with EthoTech's *Additional Sales Transaction Entry Fields*.

EthoSeries Windows

- Unallocated Items Inquiry

*Refer to [**Appendix A**](#) for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows

Series	Window Name	Required
Inventory	Item Inquiry	Optional
Inventory	Item Quantities Maintenance	Optional

Module Setup

No setup is required for this module.

Using Track Unallocated Quantities

Unallocated Items Inquiry
(*Inventory Area Page >> Inquiry > Customer Service Collection >> Unallocated Items Inquiry*)

Use the Unallocated Items Inquiry window to view a list of sales document lines with unallocated quantities:

1. Enter the desired item number, document date, and customer ranges.

2. Enter a site ID if you wish to restrict to particular site, or leave it blank to include all sites.

3. Click the Redisplay button to view a list of sales document lines containing unallocated quantities, based on your search criteria.

4. The list may be sorted by item number, document date, customer ID, or item number – document date combination.

5. Click the Print icon ![print icon] to print the list.

Unallocated Quantities may be viewed using any of the following EthoSeries Alternate Dynamics GP windows:

Unallocated Quantities may be viewed using any of the following EthoSeries Alternate Dynamics GP windows:

Item Inquiry

1. Open the Item Inquiry window (*Inventory Area Page >> Inquiry >> Item*).

2. Select an item to inquire upon.

3. In the right hand column, two new fields have been added for this module: Unallocated and Net Available. Net Available is Qty Available minus Qty Unallocated.

4. Click the Unallocated drill-back or Track Unallocated Quantities additional menu (Ctrl-Q hotkey) to open the Unallocated Items Inquiry window for the current item or item – site ID combination.

Item Quantities Maintenance

1. Open the Item Quantities Maintenance window (*Inventory Area Page >> Cards >> Quantities/Sites*).

2. Select an item to inquire upon.

3. In the right hand column, one new field has been added for this module: Unallocated.

4. Click the Unallocated drill-back or Track Unallocated Quantities additional menu (Ctrl-Q hotkey) to open the Unallocated Items Inquiry window for the current item or item – site ID combination.

Sales Transaction Entry
Use Dynamics GP Modifier to add field ASI Qty Unallocated to window Line_Scroll of form SOP_Entry (see Additional Sales Transaction Entry Fields for details).

Historical Serial and Lot Number Tracking

With Historical Serial and Lot Number Tracking, all transactions involving a serialized item or lot number can be ***displayed from one window***. This module provides the ability to determine who a specific item was purchased from and sold to, enhancing the value of history maintained by Microsoft Dynamics GP. It tracks posted and unposted transactions and works with the following modules: Inventory, Sales Order Processing, Invoicing and Purchase Order Processing.

Security

This module includes the following default roles:
- ETI HS BASE
- ETI HS USER
- ETI HS MANAGER

The ETI HS BASE role grants access to the Historical Serial and Lot Number Tracking table so that the tracking table is updated when serialized or lot numbered items are affected in various Microsoft Dynamics GP modules. This role should be assigned to all users who should NOT have access to Historical Serial and Lot Number Tracking functionality.

The ETI HS USER role grants access to the Serial and Lot Number Tracking inquiry window and tracking table. This role should be assigned to all users who should have access to Historical Serial and Lot Number Tracking functionality.

The ETI HS MANAGER role grants access to the Historical Serial and Lot Number Tracking utility and inquiry windows and tracking table. This role should be assigned to all users who will maintain Historical Serial and Lot Number Tracking.

This module uses EthoSeries windows created by EthoTech. EthoSeries windows are automatically assigned to your Microsoft Dynamics GP navigation during installation. Use the Microsoft Dynamics GP Security windows to grant – or remove – access to these windows.

EthoSeries Windows

- Serial Lot Tracking Table Utilities
- Serial and Lot Number Tracking

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows

This module does not use any Alternate Dynamics GP Windows.

Module Setup

1. Open the Serial Lot Tracking Table Utilities window (*Inventory Area Page >> Utilities >> Hist. Serial - Lot Number Tracking >> Hist. Serial - Lot Number Tracking Utilities*).
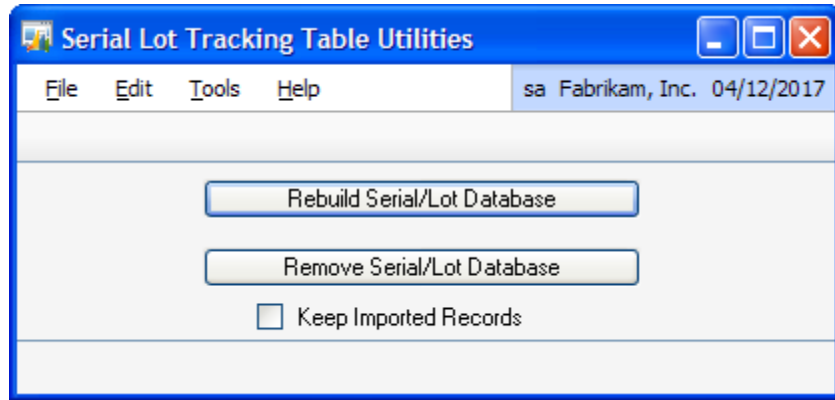
2. Select Rebuild Serial/Lot Database to initialize the files.

    Optionally, the 'Keep Imported Records' checkbox can be marked. Marking this option allows records that have been imported into the Serial and Lot Tracking table to be ignored by the Rebuild and Delete processes. Only records with the Document Type field less than 0 will be ignored with this option.

Using Historical Serial and Lot Number Tracking

You may display serial and lot number data by three ranges: Serial/Lot Number, Item Number and Document Number. The Serial and Lot Number Tracking window will display all information from the Application, including both posted and unposted data that has been entered into the system. Once you have entered your range selection, select the redisplay button to display the results. As with most Microsoft Dynamics GP inquiry windows, you may move the cursor over the Document Number field in order to zoom to the transaction detail.

Open the Serial and Lot Number Tracking window (*Inventory Area Page >> Inquiry >> Hist. Serial - Lot Number Tracking >> Hist. Serial - Lot Number Tracking Inquiry).*

The Serial and Lot Number Tracking window will display all transactions that involve Serial or Lot Numbered items including: Invoices and Returns from Sales Order Processing and Invoicing; Inventory Adjustments, Variances, and Transfers; and Purchase Order Processing Receipts. When the tracking window is initially opened, no data is displayed. Enter a range, or leave the range empty to display all data, and click the Redisplay button to view tracking data.

The Edit button is only active when Serial Number Edit from Blue Moon Industries is loaded. This button will open the Serial Number Edit window within that product in order to change or update a serial number on a posted sales transaction.

Next Numeric Collection

With Advanced Lookups and list-based navigation in Microsoft Dynamics GP, records can be searched for and located from more than just their IDs. Manually maintaining and policing a business policy to create meaningful master record IDs is no longer necessary. EthoTech Next Numeric Collection allows you to simplify this process by setting up an alpha-numeric sequence to automatically generate the next number needed for each of the following master record types: Customers, Vendors, Inventory Items, Fixed Assets, Employees, Salespeople, Prospects, Project Accounting Contract IDs and Project IDs, and WennSoft Job Numbers. And it automatically assigns Batch IDs when creating transaction batches in the Receivables, Sales or Purchasing modules. Next Numeric Collection even keeps track of records that are started and abandoned, avoiding gaps in the alpha-numeric sequence. The results are faster data entry and the elimination of many common errors.

This module works with the alternate Customer and Vendor Maintenance windows in the Microsoft Dynamics GP Project Accounting Series and also works with WennSoft's Job Cost product.

Security

This module includes the following default roles:
- ETI NN USER
- ETI NN MANAGER

The ETI NN USER role grants access to tables required to access Next Numeric Collection functionality within various Microsoft Dynamics GP modules. This role should be assigned to all users who should have access to Next Numeric Collection functionality.

The ETI NN MANAGER role grants access to the Next Numeric Collection setup window and tables. This role should be assigned to all users who will set up Next Numeric Collection.

This module uses the following windows created by EthoTech: EthoSeries windows and Alternate Dynamics GP windows. EthoSeries windows are automatically assigned to your Microsoft Dynamics GP navigation during installation. Alternate Dynamics GP windows designed by EthoTech need to be granted security access in order to be utilized. Use the Microsoft Dynamics GP Security windows to grant – or remove – access to the EthoSeries and Alternate Dynamics GP windows documented below.

EthoSeries Windows

- Next Numeric Setup

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows

Series	Window Name	Required
Inventory	Item Maintenance	Optional
Payroll	Employee Maintenance	Optional
Purchasing	Vendor Maintenance	Optional
Purchasing	Payables Batch Entry	Optional
Sales	Customer Maintenance	Optional
Sales	Receivables Batch Entry	Optional
Sales	Sales Batch Entry	Optional
Sales	Sales Prospect Maintenance	Optional
Sales	Salesperson Maintenance	Optional

Module Setup

1. Open the Next Numeric Number Setup window (*Administration Area Page >> Setup >> Company >> Next Numeric >> Next Numeric Setup*).

2. Select the Master Record Type.

3. Enter the Next Master Number. The Master Record Type determines the size of the field. You may enter any alphanumeric sequence that ends with a numeric value.

Using Next Numeric Collection

Next Batch ID – Payables Batches

1. Open the Payables Batch Entry window (*Purchasing Area Page >>Transactions >> Batches*).
2. When the Batch ID field is blank; you may select the **New** button (if using our alternate Payables Batch Entry window), the hotkey CTRL + N, or *Additional >> Next Batch ID* to enter the next Batch ID.
3. Continue adding a new batch as usual.

Next Batch ID – Receivables Batches

1. Open the Receivables Batch Entry window (*Sales Area Page >> Transactions >> Receivables Batches*).
2. When the Batch ID field is blank; you may select the **New** button (if using our alternate Receivables Batch Entry window), the hotkey CTRL + N, or *Additional >> Next Batch ID* to enter the next Batch ID.
3. Continue adding a new batch as usual.

Next Batch ID – Sales Batches

1. Open the Sales Batch Entry window (*Sales Area Page >> Transactions >> Sales Batches*).
2. When the Batch ID field is blank; you may select the **New** button (if using our alternate Sales Batch Entry window), the hotkey CTRL + N, or *Additional >> Next Batch ID* to enter the next Batch ID.
3. Continue adding a new batch as usual.

Next Customer ID

1. Open the Customer Maintenance window (*Sales Area Page >> Cards >> Customer*).
2. When the Customer ID field is blank; you may select the **New** button (if using our alternate Customer Maintenance window), the hotkey CTRL + N, or *Additional >> Next Customer ID* to enter the next Customer ID.
3. Continue adding a new customer as usual.
4. When a quote for a prospect is transferred to an order, the Prospect to Customer window opens and allows the user to set the Customer ID. Delete the existing Customer ID, tab off the Customer ID field, and then choose the Next Customer ID selection from the Additional menu to enter the next Customer ID.

Next Employee ID

1. Open the Employee Maintenance window (*HR & Payroll Area Page >> Cards >> Employee*).
2. When the Employee ID field is blank; you may select the **New** button (if using our alternate Employee Maintenance window), the hotkey CTRL + N, or *Additional >> Next Employee ID* to enter the next Employee ID.
3. Continue adding a new employee as usual.

Next Fixed Asset ID

1. Open the Asset General Information window (*Financial Area Page >> Cards >> Fixed Assets >> General*).
2. When the Asset ID field is blank; you may choose the hotkey CTRL + N or *Additional >> Next Asset ID* to enter the next Asset ID. The Asset Suffix will be set to 1.
3. Continue adding a new asset as usual.

Next Item Number

1. Open the Item Maintenance window (*Inventory Area Page >> Cards >> Item*).
2. When the Item Number field is blank; you may select the **New** button (if using our alternate Item Maintenance window), the hotkey CTRL + N, or *Additional >> Next Item Number* to enter the next Item Number.
3. Continue adding a new item as usual.

Next Project Accounting Contract ID

1. Open the Contract Maintenance window (*Project Area Page >> Cards >> Contract*).
2. When the Contract ID field is blank; you may choose the hotkey CTRL + N or *Additional >> Next Contract ID* to enter the next Contract ID.
3. Continue adding a new contract as usual.

Next Project Accounting Project ID

1. Open the Project Maintenance window (*Project Area Page >> Cards >> Project*).
2. When the Project ID field is blank; you may choose the hotkey CTRL + N or *Additional >> Next Project ID* to enter the next Project ID.
3. Continue adding a new project as usual.

Next Prospect ID

1. Open the Prospect Maintenance window (*Sales Area Page >> Cards >> Prospects*).
2. When the Prospect ID field is blank; you may select the **New** button (if using our alternate Prospect Maintenance window), the hotkey CTRL + N, or *Additional >> Next Prospect ID* to enter the next Prospect ID.
3. Continue adding a new prospect as usual.

Next Salesperson ID

1. Open the Salesperson Maintenance window (*Sales Area Page >> Cards >> Salesperson*).
2. When the Salesperson ID field is blank; you may select the **New** button (if using our alternate Salesperson Maintenance window), the hotkey CTRL + N, or *Additional >> Next Salesperson ID* to enter the next Salesperson ID.
3. Continue adding a new salesperson as usual.

Next Vendor Number

1. Open the Vendor Maintenance window (*Purchasing Area Page >> Cards >> Vendor*).
2. When the Vendor ID field is blank; you may select the **New** button (if using our alternate Vendor Maintenance window), the hotkey CTRL + N, or *Additional >> Next Vendor ID* to enter the next Vendor ID.
3. Continue adding a new vendor as usual.

Next WennSoft Job Number

1. Open the Job Maintenance window (*Cards >> Job Cost >> Job*).

2. When the Job Number field is blank; you may choose the hotkey CTRL + N or _Additional >> Next Job Number_ to enter the next Job Number.
3. Continue adding a new job as usual.

NOTE: all modules in Next Numeric Collection keep track of master record numbers that were created and then abandoned so as to prevent gaps in the numeric sequence.

Quick Track

Quick Track provides the ability to track shipments within Microsoft Dynamics GP. This module allows an unlimited number of packages to be tracked per document. Quick Track provides access to the carrier's World Wide Web site on the Internet for on-line delivery information, all without leaving the accounting system.

Security

This module includes the following default roles:
- ETI QT USER
- ETI QT MANAGER

The ETI QT USER role grants access to all windows and tables required to access Quick Track functionality. This role should be assigned to all users who should have access to Quick Track.

The ETI QT MANAGER role grants access to the Quick Track setup window and tables. This role should be assigned to all users who will set up Quick Track.

This module uses the following windows created by EthoTech: EthoSeries windows and Alternate Dynamics GP windows. EthoSeries windows are automatically assigned to your Microsoft Dynamics GP navigation during installation. Alternate Dynamics GP windows designed by EthoTech need to be granted security access in order to be utilized. Use the Microsoft Dynamics GP Security windows to grant – or remove – access to the EthoSeries and Alternate Dynamics GP windows documented below.

EthoSeries Windows

- Quick Track Carrier Setup
- Quick Track Shipping Method Carrier Setup
- Quick Track Inquiry
- Quick Track Entry

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Alternate Dynamics GP Windows

Series	Window Name	Required
Sales	Sales Transaction Entry	Optional
Sales	Sales Order Fulfillment	Optional
Sales	Sales Transaction Inquiry Zoom	Optional

Module Setup

NOTE: Carrier and Shipping Method Carrier Setup is only required for the automatic tracking of packages for carrier's with World Wide Web sites. Skip this section if you will not be using this feature.

Carrier Setup

Open the Carrier Setup window (*Sales Area Page >> Setup >> Quick Track >> Quick Track Carrier Setup*). Each carrier will have a unique ID and a description of that carrier. Each carrier can also have a Carrier URL, pointing to a World Wide Web site for tracking packages. The URL will be unique for each carrier. For most carriers the URL will automatically invoke package tracking at their website; for others, the website will be navigated to and you will need to manually enter the tracking information before any package tracking can begin.

To setup a new carrier:

1. Enter a unique Carrier ID (ex. FEDEX).

2. Enter a description for the carrier (ex. Federal Express).

3. Enter a URL for the carrier's website.

4. Save the entry.

The following are the URLs to enter for some national carriers.

Quick Track Carrier Setup
DHL
http://track.dhl-usa.com//TrackByNbr.asp?ShipmentNumber=%1
Federal Express
http://www.fedex.com/Tracking?action=track&cntry_code=&initial=x&mps=y&tracknumbers=%1
Purolator
http://shipnow.purolator.com/shiponline/track/PurolatorTrackE.asp?PINNO=%1
Roadway Express
http://www.quiktrak.roadway.com/cgi-bin/quiktrak *(manual tracking number entry required)*
UPS
http://wwwapps.ups.com/etracking/tracking.cgi?submit=Track&InquiryNumber1=%1&TypeOfInquiryNumber=T
U.S. Postal Service
http://www.usps.gov/cttgate *(manual tracking number entry required)*

NOTE: If any of these carriers change their website, the URL may need to be updated. Check the EthoTech website at www.ethotech.com for periodic updates of the carrier URLs.

To set up a World Wide Web link for a carrier not listed above:
You will need to know the URL address for the carrier's tracking web site. Where appropriate in the URL, substitute the following variables for tracking number, country and shipping date.

Tracking Number = %1   Country = %2   Shipping date = %3

If the carrier has other input options available for tracking, enter the main tracking page URL. Do not enter any variables within the URL. All tracking information will need to be entered manually by the user.

Shipping Method Carrier Setup

Open the Shipping Method Carrier Setup window (*Sales Area Page >> Setup >> Quick Track >> Quick Track Shipping Method Carrier Setup*). Each Shipping Method defined in the Application will need to be linked to a carrier in order for automatic World Wide Web package tracking.

To setup a Shipping Method Carrier:

1.   Select a Shipping Method.

2.   Enter a Carrier ID.

3.   Save the entry.

NOTE: Entries in this table DO NOT affect your shipping methods defined in the Application.

Using Quick Track

Entering Packages

Packages can be entered during Sales Transaction Entry or Sales Order Fulfillment. The Quick Track Entry window can be opened from the Sales Transaction Entry Additional menu, the hotkey CTRL + T, or by zooming on the Freight field (if you are using the alternate Sales Transaction Entry window provided by EthoTech). In Sales Order Fulfillment, open the Quick Track Entry window from the Sales Order Fulfillment Additional menu, the hotkey CTRL + T, or just click the Quick Track button (if you are using the alternate Sales Order Fulfillment window provided by EthoTech). Information regarding the order is displayed at the top of the window. Information regarding each package of the order can be entered into

the scrolling window. The tracking number is the only required field for the package. If no date or time is entered then the current user date and time are used.

To delete all packages for an order, click the Delete button on the Quick Track Entry window. To delete an individual package, right-click the package and select Delete Row.

NOTE: When an order is transferred to an invoice, all package information remains linked to the order number as well as being transferred to the invoice number. Once the transfer is complete, any changes made to packages on the order or the invoice will need to be manually updated.

Package Inquiry

Inquiry of packages can be accomplished in two ways.

1. **Quick Track Zoom.** The Quick Track Zoom window can be opened from the Sales Transaction Inquiry Zoom Additional menu, the hotkey CTRL + T, or by zooming on the Freight field of the Sales Transaction Inquiry Zoom window (if you are using the alternate Sales Transaction Inquiry Zoom window provided by EthoTech). The Quick Track Zoom window displays information regarding the order and all packages that were entered through Quick Track Entry.

2. **Quick Track Inquiry.** Packages can be searched based on the following.

- Document ID

- Customer ID

- Ship Date

- Tracking Number

Enter the method by which to search and select **All** packages or enter a range for the selected search method. Click the Redisplay button to view the results. Customer Number and Document Number can be zoomed to see detailed information regarding either.

Tracking Packages through the World Wide Web

Packages can be tracked on the World Wide Web for those carriers with a WWW website. Tracking is done through the Quick Track Entry, Quick Track Inquiry and the Quick Track Zoom windows. Simply click on the Tracking Number drill-down field after selecting the row you would like to track. This is available from all of the windows that display tracking numbers within Quick Track.

Salesperson Enhancements

This module provides the ability for every customer address to be assigned to a unique Salesperson ID. If Microsoft Dynamics GP Sales Order Processing is used with this enhancement, then the salesperson for the order will be determined by the Ship To address.

Security

This module includes the following default roles:
- ETI SE MANAGER

The ETI SE MANAGER role grants access to the Salesperson Enhancements setup window. This role should be assigned to all users who will set up Salesperson Enhancements.

This module uses the following windows created by EthoTech: EthoSeries windows. EthoSeries windows are automatically assigned to your Microsoft Dynamics GP navigation during installation.

EthoSeries Windows

- Salesperson Enhancements Setup
- Customer Address Salesperson Utilities

*Refer to **Appendix A** for details on locating EthoSeries windows in Microsoft Dynamics GP.*

Module Setup

Salesperson Enhancements Setup
Sales Area Page >> Setup >> Salesperson Enhancements >>Salesperson Enhancements Setup.
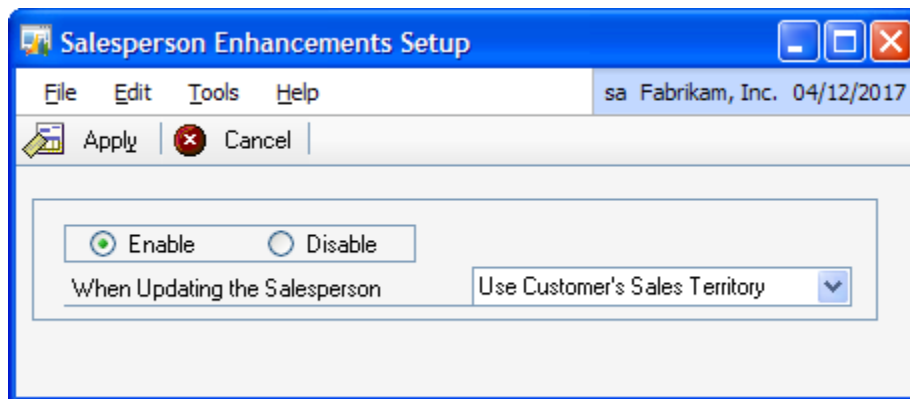
1. Open the Salesperson Enhancements Setup window.
2. Mark the Enable Salesperson By Ship To option.
3. Select the drop-down list next to the label: **When Updating the Salesperson**. You have three choices to use with this module, which involve the Sales Territory that will be assigned to the Sales Order Processing transactions that are created when this module is registered. Select the choice that describes how Salesperson by Ship To should work with the Sales Territory field.

Customer Address Salesperson Utilities
Sales Area Page >> Utilities >> Salesperson Enhancements >> Customer Address Salesperson Utilities

This process will initialize the Salesperson field for all customer address records in the Application:

1. Open the Customer Address Salesperson Utilities window.

2. Select the appropriate processing option in the **Set Customer Address Salesperson To** drop-down box:

   - *Salesperson in Customer Master*, which will assign the salesperson on the customer master to each customer address.

   - *Blank (Clear the Salesperson field)*, which will remove any salesperson already assigned to a customer address.

3. Select Process to complete the setup.

Using Salesperson by Ship To

Customer Address Maintenance
Sales Area Page >> Cards >> Addresses

1. Open Customer Address Maintenance

2. For each customer, assign a Salesperson ID to each Address ID.

Sales Transaction Entry
Sales Area Page >> Transactions >> Sales Transaction Entry

1. Use the Sales Transaction Entry window as normal.

2. When a customer is selected, the Salesperson ID assigned to the default ship to address will initially be assigned to the sales document.

3. When you select or change the document's ship to address, that address's salesperson will be assigned to the sales document, just as if you had typed it in right after selecting a new ship to address, and the Sales Territory field will be updated based upon your setup choice.

4. When you select or change the document's ship to address and roll down changes, that address's salesperson will be assigned to the sales document and appropriate line items, just as if you had typed it in after selecting a new ship to address, and the Sales Territory field(s) will be updated based upon your setup choice.

   When you select or change a sales document line item's ship to address, that address's salesperson will be assigned to the line item, just as if you had typed it in after selecting a new ship to address, and the line item Sales Territory field will be updated based upon your setup choice.

   Microsoft Dynamics GP commissions are updated when Salesperson By Ship to changes the Salesperson ID(s).

__Product Support__

Contacting Support

EthoTech Product Support is available Monday through Friday from 9:00 am to 5:00 pm EST.

Product Support can be reached in the following ways:

<div align="center">

678.384.7500
support@ethotech.com
http://www.ethotech.com

</div>

Before contacting Product Support, please gather information about your Microsoft Dynamics GP system and your EthoTech product. This information will assist our Product Support team in servicing your support needs in a timely and effective manner. Use the following list of questions to help you prepare for contacting Product Support.

1. Describe the process you were following when the error occurred. Please include the module you were in, the windows you were using, what you were doing when you received the error message and list the exact error message.

2. What version of Microsoft Dynamics GP are you using? Please include the service pack number.

3. What version of your EthoTech product are you using?

4. Are there other 3rd Party products installed? If so, please list them.

5. Have you attempted to resolve the situation? What have you done so far?

6. Does this problem occur on any other Dynamics GP client?

7. Does this problem occur for other users of your software?

8. Can you recreate the problem? How? Please list the steps.

9. Do you have a valid backup that can be restored if necessary?

When you call or email EthoTech for product support, please include the following information:

-   Your name, company name and phone number.

-   The information gathered from the above list of questions.

-   In addition, have this manual available when you are connected with Product Support - you may be directed to various pages in the manual as you are helped with your problem.

Registration Information

The EthoTech Registration window provides version and build information for all EthoTech products. The Microsoft Dynamics GP system password is required to access this window.

You can access the window via the Additional Menu that appears on the About Microsoft Dynamics GP window, or by choosing EthoTech Registration from the System Setup menu. If you open the EthoTech Registration window from the System Setup menu, you will need to click the Series Name lookup icon on the registration window and choose The EthoSeries.

Click the **Series Name** lookup icon to select other installed EthoTech products for registration.

To view registration information for other installed EthoTech products, click the Series Name lookup icon. Entering valid registration keys and clicking **Register** will populate the Total Users Allowed and Expiration Date fields.

If you are testing the product within the Microsoft Dynamics GP sample company and do not wish to receive registration messages when logging into production companies, mark the Suppress Registration Warning checkbox and click Register.

EthoTech SQL Object Initialization Log

The EthoTech SQL Object Initialization Log contains table creation and update information. This information is used to troubleshoot table conversation issues. To open this window, select *Inquiry > System > EthoTech SQL Object Initialization Log* – you will be prompted to enter the Microsoft Dynamics GP system password.
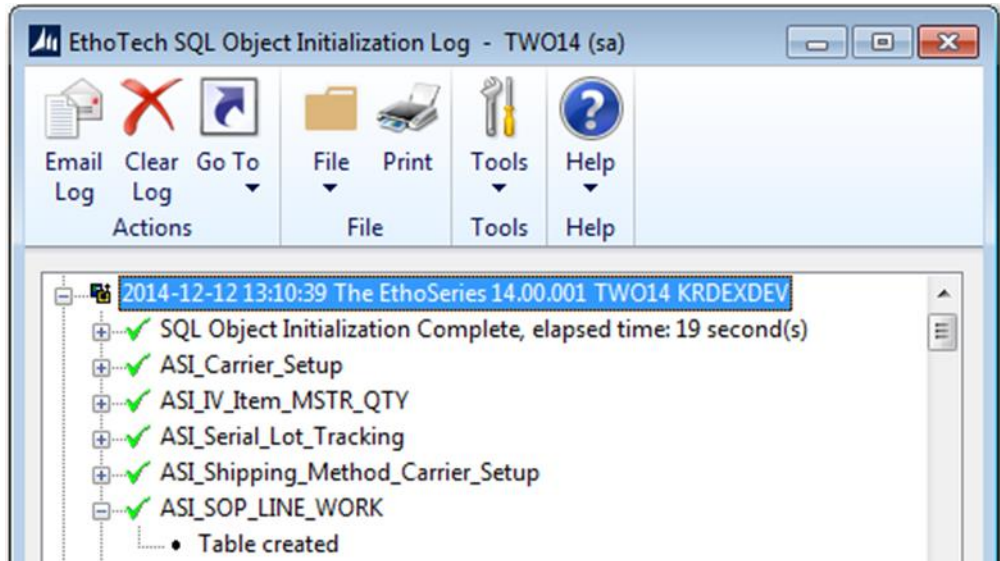
To email this log to the EthoTech Product Support team, click the Email Log button.

EthoTech Database Build Log

For each installed EthoTech product, the EthoTech Database Build Log contains the build number for each Dynamics GP database. For a given product, all databases should display the same build number.
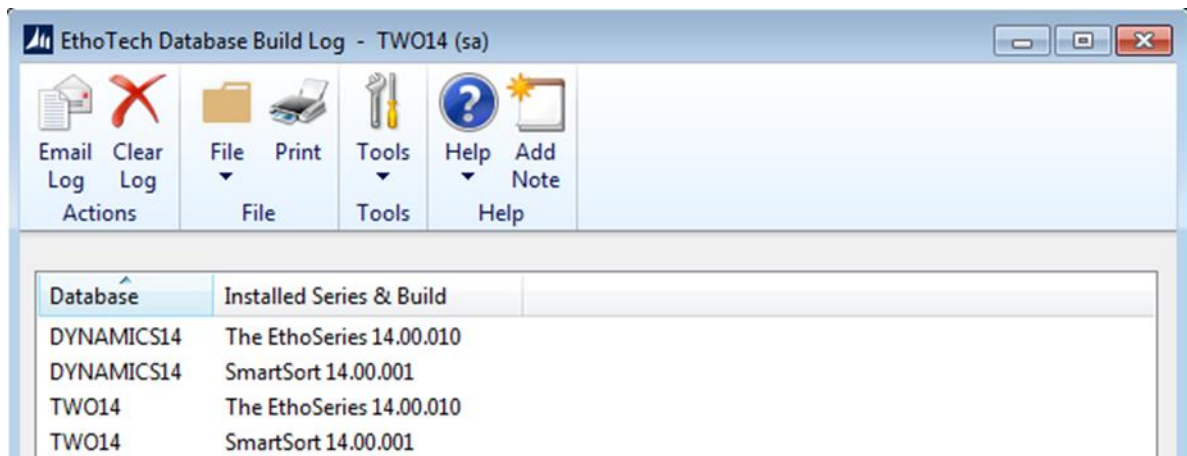
You can access the window via the **Go To** button that appears on the EthoTech SQL Object Initialization Log window or by selecting *Inquiry > System > EthoTech Database Build Log*.

To email this log to the EthoTech Product Support team, click the Email Log button.

EthoTech Workstation Build Log

For each installed EthoTech product, the EthoTech Workstation Build Log contains the build number for each Microsoft Dynamics GP client. For a given product, all Dynamics GP clients should display the same build number.

You can access the window via the **Go To** button that appears on the EthoTech SQL Object Initialization Log window or by selecting *Inquiry > System > EthoTech Workstation Build Log*.

To email this log to the EthoTech Product Support team, click the Email Log button.

Appendix A – EthoSeries Windows

The following table lists the windows added for each EthoSeries product.

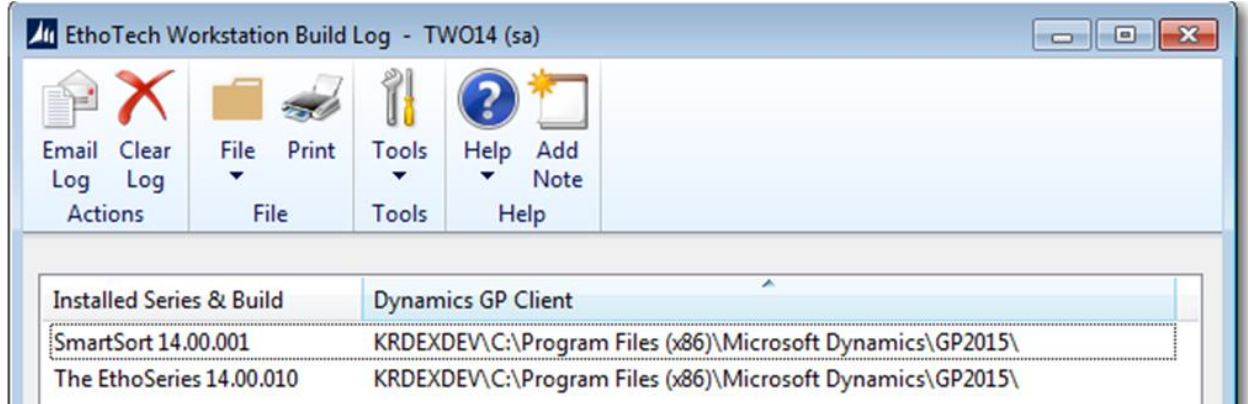| Product	Series	Window Name / Path
Commission Plan	Inventory	Item Commission Plan Info *(Sales Area Page >> Cards >> Commission Plan >> Item Commission Plan Info)*
Commission Plan	Inventory	Item Commission Plan Info Inquiry *(Commission Line Trace >> Salesperson From Expansion)*
Commission Plan	Inventory	Item Commission Plan Setup *(Sales Area Page >> Setup >> Commission Plan >> Item Commission Plan Setup)*
Commission Plan	Inventory	Item Plans *(Item Commission Plan Setup >> Item Commission Plan Lookup)*
Commission Plan	Inventory	Mass Update Items *(Sales Area Page >> Utilities >> Commission Plan >> Update Item Commission Plans)*
Commission Plan	Sales	Accrual Run Inquiry *(Sales Area Page >> Inquiry >> Commission Plan >> Accrual Run Inquiry)*
Commission Plan	Sales	Accrual Runs *(Accrual Run Inquiry>> Accrual Run ID Lookup)*
Commission Plan	Sales	Accrue Commissions *(Sales Area Page >> Routines >> Commission Plan >> Accrue Commissions)*
Commission Plan	Sales	Comm Plan Overdue Setup *(Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup >> Go To button >> Overdue Setup)*
Commission Plan	Sales	Comm Rate Override Dates *(Commission Plan Rate Override Setup >> Start Date lookup button)*
Commission Plan	Sales	Commission Line Trace *(Commission Plan Detail Entry / Detail Inquiry Zoom >> Commission Trace Expansion)*
Commission Plan	Sales	Commission Adjustment Documents *(Commission Plan Adjustment Entry >> Document No. Lookup)*
Commission Plan	Sales	Commission Plan Adjustment Entry *(Sales Area Page >> Transactions >> Commission Plan >> Commission Plan Adjustment Entry)*
Commission Plan	Sales	Commission Plan Adjustment Import *(Microsoft Dynamics GP Button >> Tools >> Integrate >> Commission Plan >> Commission Plan Adjustment Import)*
Commission Plan	Sales	Commission Adjustment Inquiry *(Sales Area Page >> Inquiry >> Commission Plan >> Adjustment Inquiry)*
Commission Plan	Sales	Commission Adjustment Inquiry Zoom *(Commission Adjustment Inquiry >> Adjustment Number >> Inquiry Drill-back)*
Commission Plan	Sales	Commission Plan Credit Card Setup *(Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup >> Addit'l Reductions >> Credit Card Setup)*
Commission Plan	Sales	Commission Plan Default Tiers *(Sales Area Page >> Setup >> Commission Plan >> Commission Plan Default Tiers)*
Commission Plan	Sales	Commission Plan Entry *(Sales Area Page >> Transactions >> Commission Plan >> Commission Plan Entry)*
Commission Plan	Sales	Commission Plan Inquiry Zoom *(Sales Transaction Inquiry Zoom >> Additional >> Commission Plan)*
Commission Plan	Sales	Commission Plan Item Tiers *(Sales Area Page >> Cards >> Commission Plan >> Item Commission Plan Info > Item Tiers Expansion)*
Commission Plan	Sales	Commission Plan Matrix Inquiry *(Commission Line Trace >> Comm Rate Expansion)*
Commission Plan	Sales	Commission Plan Matrix Setup *(Sales Area Page >> Setup >> Commission Plan >> Commission Plan Matrix Setup)*
Commission Plan	Sales	Commission Plan Override Date Document Paid *(Sales Area Page >> Utilities >> Commission Plan >> Commission Plan Utilities >> Utilities List >> Override Date Document Paid)*
Commission Plan	Sales	Commission Plan Payment Terms Setup *(Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup >> Addit'l Reductions >> Payment Terms Setup)*
Commission Plan	Sales	Commission Plan Quota Report *(Sales Area Page >> Reports >> Commission Plan >> Commission Plan Quota Report)*
Commission Plan	Sales	Commission Plan Quotas *(Sales Area Page >> Setup >> Commission Plan >> Commission Plan Matrix Setup > Quotas Expansion)*
Commission Plan	Sales	Commission Plan Rate Override Inquiry *(Commission Line Trace >> Commission Rate Expansion)*

Commission Plan	Sales	Commission Plan Rate Override Setup (*Commission Plan Setup >> Go To >> Commission Rate Override Setup*)
Commission Plan	Sales	Commission Plan Reduction Inquiry (*Commission Line Trace >> Comm Reduction Amt Expansion*)
Commission Plan	Sales	Commission Plan Report (*Sales Area Page >> Reports >> Commission Plan >> Commission Plan Report*)
Commission Plan	Sales	Commission Plan Sales Document Info (*Commission Plan Entry >> Go To >> Sales Document Info Overrides*)
Commission Plan	Sales	Commission Plan Sales Document Info Inquiry (*Commission Plan Inquiry Zoom >> Go To >> Sales Document Info Overrides*)
Commission Plan	Sales	Commission Plan Sales Type ID Setup (*Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup >> Sales Type ID Setup*)
Commission Plan	Sales	Commission Plan Salesperson Class Setup (*Sales Area Page >> Setup >> Commission Plan >> Commission Plan Salesperson Class Setup*)
Commission Plan	Sales	Commission Plan Salesperson From Ranking Inquiry (*Commission Plan Entry >> Salesperson From Rankings Expansion*)
Commission Plan	Sales	Commission Plan Salesperson From Ranking Setup (*Commission Plan Setup >> Salesperson From Rankings Expansion*)
Commission Plan	Sales	Commission Plan Setup (*Sales Area Page >> Setup >> Commission Plan >> Commission Plan Setup*)
Commission Plan	Sales	Commission Plan Summary History (*Sales Area Page >> Inquiry >> Commission Plan >> Summary History*)
Commission Plan	Sales	Commission Plan Summary Utilities (*Sales Area Page >> Utilities >> Commission Plan >> Commission Plan Utilities >> Utilities List >> Commission Plan Summary Utilities*)
Commission Plan	Sales	Commission Plan Tiers (*Sales Area Page >> Setup >> Commission Plan >> Commission Plan Matrix Setup > Tiers Expansion*)
Commission Plan	Sales	Commission Plan Tiers Rate Inquiry (*Commission Line Trace >> Comm Rate Expansion*)
Commission Plan	Sales	Commission Plan User-Defined Setup (*Commission Plan Setup >> Edit User-Defined Values Expansion*)
Commission Plan	Sales	Commission Plan User-Defined Values (*Customer Commission Plan Info >> User-Defined Lookup*)
Commission Plan	Sales	Commission Plan Utilities (*Sales Area Page >> Utilities >> Commission Plan >> Commission Plan Utilities*)
Commission Plan	Sales	Commission Plan Utilities Sales Type ID Restrictions (*Sales Area Page >> Utilities >> Commission Plan >> Commission Plan Utilities >> Sales Type ID – Restricted List*)
Commission Plan	Sales	Commission Rate Override IDs (Commission Plan Rate Override Setup >> Override ID lookup button)
Commission Plan	Sales	Commission Run Inquiry (*Sales Area Page >> Inquiry >> Commission Plan >> Commission Run Inquiry*)
Commission Plan	Sales	Commission Runs (*Commission Run Inquiry >> Commission Run ID Lookup*)
Commission Plan	Sales	Customer Commission Plan Info (*Sales Area Page >> Cards >> Commission Plan >> Customer Commission Plan Info*)
Commission Plan	Sales	Customer Commission Plan Info Inquiry (*Commission Line Trace >> Salesperson From Expansion*)
Commission Plan	Sales	Customer Commission Plan Setup (*Sales Area Page >> Setup >> Commission Plan >> Customer Commission Plan Setup*)
Commission Plan	Sales	Customer Plans (*Customer Commission Plan Setup >> Customer Commission Plan Lookup*)
Commission Plan	Sales	Mass Update Customers (*Sales Area Page >> Utilities >> Commission Plan >> Update Customer Commission Plans*)
Commission Plan	Sales	Mass Update Salespeople (*Sales Area Page >> Utilities >> Commission Plan >> Update Salesperson Commission Plans*)
Commission Plan	Sales	Noncommissioned Salesperson Inquiry (*Commission Plan Entry >> Noncommissioned Salespeople*)
Commission Plan	Sales	Process Commissions (*Sales Area Page >> Routines >> Commission Plan >> Process Commissions*)
Commission Plan	Sales	Sales Territory Commission Plan Info (*Sales Area Page >> Cards >> Commission Plan >> Sales Territory Commission Plan Info*)
Commission Plan	Sales	Sales Territory Commission Plan Info Inquiry (*Commission Line Trace >> Salesperson From Expansion*)
Commission Plan	Sales	Salesperson Accrual Run Inquiry (*Sales Area Page >> Inquiry >> Commission Plan >> Accrual Run Inquiry - Salesperson*)

Commission Plan	Sales	Salesperson Commission Plan Info *(Sales Area Page >> Cards >> Commission Plan >> Salesperson Commission Plan Info)*
Commission Plan	Sales	Salesperson Commission Plan Setup *(Sales Area Page >> Setup >> Commission Plan >> Salesperson Commission Plan Setup)*
Commission Plan	Sales	Salesperson Classes *(Commission Plan Salesperson Class Setup >> Salesperson Class Lookup)*
Commission Plan	Sales	Salesperson Commission Quota Inquiry *(Sales Area Page >> Inquiry >> Commission Plan >> Commission Plan Quota Inquiry - Salesperson)*
Commission Plan	Sales	Salesperson Commission Quota Inquiry – Period *(Salesperson Commission Quota Inquiry >> Period Inquiry Expansion)*
Commission Plan	Sales	Salesperson Commission Quota Inquiry – Period Detail *(Salesperson Commission Quota Inquiry – Period >> Calculation Details Expansion)*
Commission Plan	Sales	Salesperson Commission Quota Inquiry – Period Documents *(Salesperson Commission Quota Inquiry – Period >> Sales Documents Expansion)*
Commission Plan	Sales	Commission Plan Quota Periods Setup *(Sales Area Page >> Setup >> Commission Plan >> Commission Plan Quota Periods Setup)*
Commission Plan	Sales	Salesperson Commission Run Inquiry *(Sales Area Page >> Inquiry >> Commission Plan >> Commission Run Inquiry - Salesperson)*
Commission Plan	Sales	Salesperson Plans *(Salesperson Commission Plan Setup >> Salesperson Commission Plan Lookup)*
Commission Plan	Sales	User-Defined 1 Commission Plan Info *(Sales Area Page >> Cards >> Commission Plan >> User-Defined 1 Commission Plan Info)*
Commission Plan	Sales	User-Defined 1 Commission Plan Info Inquiry (*Commission Line Trace >> Salesperson From Expansion*)
Commission Plan	System	Commission Plan User Setup *(Commission Plan Setup >> Restrict Users Expansion)*
Commission Plan	System	EthoTech Series Attribute Setup *(Commission Plan Setup or EthoTech Registration >> Options >> Enable Apex or Keystone)*
Customer Service Collection	Inventory	Expected Receipt Date Utilities *(Sales Area Page >> Utilities >> Customer Service Collection >> Expected Receipt Date Utilities)*
Customer Service Collection	Inventory	Unallocated Items Inquiry *(Inventory Area Page >> Inquiry >> Customer Service Collection >> Unallocated Items Inquiry)*
Customer Service Collection	Sales	Customer Item Data *(Sales Transaction Entry >> Additional >> Customer Item Data*
Customer Service Collection	Sales	Customer Service Collection Setup *(Sales Area Page >> Setup >> Customer Service Collection >> Customer Service Collection Setup)*
Customer Service Collection	Sales	Move Sales Documents *(Sales Area Page >> Utilities >> Customer Service Collection >> Move Sales Documents)*
Customer Service Collection	Sales	Move Sales Documents Edit List *(Move Sales Documents >> Edit List)*
Customer Service Collection	Sales	Restriction IDs *(Move Sales Documents >> Restriction ID Lookup)*
Historical Serial & Lot Number Tracking	Inventory	Serial and Lot Number Tracking *(Inventory Area Page >> Inquiry >> Hist. Serial - Lot Number Tracking >> Historical Serial and Lot Tracking Inquiry)*
Historical Serial & Lot Number Tracking	Inventory	Serial Lot Tracking Table Utilities *(Inventory Area Page >> Utilities >> Hist. Serial - Lot Number Tracking >> Historical Serial and Lot Number Tracking Utilities)*
Next Numeric Collection	Company	Next Numeric Number Setup *(Administration Area Page >> Setup >> Company >> Next Numeric >> Next Numeric Setup)*
Quick Track	Company	Quick Track Carrier Setup *(Sales Area Page >> Setup >> Quick Track >> Quick Track Carrier Setup)*
Quick Track	Company	Quick Track Shipping Method Carrier Setup *(Sales Area Page >> Setup >> Quick Track >> Quick Track Shipping Method Carrier Setup)*
Quick Track	Sales	Quick Track Entry *(Sales Area Page >> Transactions >> Quick Track >> Quick Track Entry)*
Quick Track	Sales	Quick Track Inquiry *(Sales Area Page >> Inquiry >> Quick Track >> Quick Track Inquiry)*
Salesperson Enhancements	Sales	Customer Address Salesperson Utilities *(Sales Area Page >> Utilities >> Salesperson By Ship To >> Customer Address Salesperson Utilities)*
Salesperson Enhancements	Sales	Salesperson Enhancements *(Sales Area Page >> Setup >> Salesperson Enhancements >> Salesperson Enhancements Setup)*

<u>Appendix B – EthoSeries Tables</u>

System Tables

These tables are created in the DYNAMICS database.

SQL Table Name	Display Name
ASI00998	ASI_Current_Activity
ASI80100	ASI Enhanced Security Setup
ASI80200	ASI Enhanced Security Master
ETI00990	ETI_Registration
ETI00991	ETI_SeriesAttributes
ETI00994	ETI_CT_WorkstationBuild
ETI00995	ETI_Registration_Detail
ETI00996	ETI_CT_DatabaseBuild
ETI00997	ETI_CT_Log
ETI00998	ETI_syOperations
ETI00999	ETI_HotKeySetup
ETI28921	ETI_CP_AdjDocImport
ETI28922	ETI_CP_AdjHdrImport
ETI28923	ETI_CP_AdjLineImport
ETI28924	ETI_CP_AdjImportSetup
ETI28925	ETI_CP_AdjImportProcessLog
ETI60100	ETI_CP_UserCompanyMiscAccess
ETI80200	ETI_EPS_Password_Hist
ETI80201	ETI_EPS_Workstation_MSTR
ETI80202	ETI_EPS_Company_MSTR
ETI80203	ETI_EPS_Time_Restriction

Company Tables

These tables are created in the company database.

SQL Table Name	Display Name
ASI00102	ASI Item Quantity Master
ASI10061	ASI Serial/Lot Number Tracking
ASI10065	Sales Transaction ASI Labels
ASI10066	ASI_Next_Numeric_Setup
ASI10067	ASI_Next_Numeric_Control
ASI10200	ASI Sales Transaction Amounts Work
ASI27000	ASI_Shipping_Method_Carrier_Setup
ASI27001	ASI_Carrier_Setup
ASI27002	ASI_Track
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
ASI28101	ASI Commission Plan
ASI28210	ASI_Customer_Salesperson_MSTR
ASI28220	ASI_Item_Salesperson_MSTR
ASI28230	ASI_Salesperson_Salesperson_MSTR
ASI28301	ASI Commission Work
ASI28311	ASI Commission Line
ASI28800	ASI Commission Plan Summary File
ASI28901	ASI_Commission_Plan_Setup
ASI29000	ASI_Shipping_Labels_Setup
ASI40101	ASI SOP Setup
ETI00700	ETI_Date_Compare
ETI28030	ETI_CP_SalespersonClassMSTR
ETI28050	ETI_CP_SPFromGroupMSTR
ETI28101	ETI_CP_Plan_Combination_MSTR
ETI28102	ETI_CP_CommRateOverrideSETP
ETI28103	ETI_CP_CommRateOverrideDates
ETI28104	ETI_CP_CommRateOverrideRates
ETI28210	ETI_Doc_Cust_Salesperson
ETI28220	ETI_Cust_Addr_Item_Salesperson
ETI28221	ETI_Doc_Item_Salesperson
ETI28230	ETI_CP_Print_Salespeople

ETI28240	ETI_CP_Email_Addresses
ETI28250	ETI_CP_Territory_Salesperson_MSTR
ETI28260	ETI_CP_UserDef1_Salesperson_MSTR
ETI28302	ASI Commision 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
ETI28314	ETI_SOP_LINE_Tiers_Inquiry
ETI28315	ETI_SOP_LINE_Comm_Disc_Taken_Inquiry
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
ETI28902	ETI_Comm_Plan_Tiers_MSTR
ETI28903	ETI_Comm_Plan_Doc_ID_Ignore
ETI28905	ETI_Doc_Credit_Card
ETI28906	ETI_Comm_Plan_Payment_Terms_MSTR
ETI28907	ETI_Doc_Payment_Terms
ETI28908	ETI_Comm_Plan_Past_Due_MSTR
ETI28909	ETI_Doc_Past_Due
ETI28910	ETI_SOP_HDR_Indexes
ETI28911	ETI_SOP_LINE_Indexes
ETI28912	ETI_CP_Select_Doc_IDs
ETI28913	ETI_SOP_LINE_Info
ETI28914	ETI_CP_Process_Log
ETI28915	ETI_CP_Accrual_Log
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
ETI28920	ETI_CP_Adjustment_Docs
ETI40101	ETI_SE_Module_Setup
ETI40102	ETI_SE_SOP_Doc_Type_Salesperson

ETI40400	ETI_CP_UserDefined_SETP
ETI70100	Move Sales Documents Restrictions