# SavvyComp v16.1.0.1

For Microsoft Dynamics 365 Business Central v16

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## Prerequisites

This document assumes a working knowledge of Microsoft Dynamics 365 Business Central, hereafter referred to as Business Central.

## SavvyComp Pages in Business Central

Use the Business Central search pane to open the SavvyComp pages referred to in this document.

## Product Overview

SavvyComp is designed to help you calculate variable compensation amounts – commissions, royalties, bonuses, etc. – for sales documents within Business Central.

Compensation calculations are performed for Business Central's salespeople, but you're not limited to employee sales reps; we defined Salesperson as any entity for which you need a calculation performed, including non-employee reps, distribution companies, brokers, and royalty recipients – authors, inventors, license holders, etc. You can assign salespeople to different Business Central entities – Customers, Item Type / No. combinations (entities that may appear on a sales document line), Territories, etc. Compensation splits can be automated for all these assignments.

Information that appears on a sales document / document line may be overridden for the purposes of calculating compensation without affecting the actual sales document. You can edit compensation documents after the associated sales documents are posted.

A currency may be assigned per salesperson, allowing compensation to be created in the salesperson's currency regardless of the currency assigned to a sales document. Compensation rates may be set up per currency.

# Setup

## Designing the Compensation Matrix

SavvyComp uses a five-dimensional matrix – salesperson, customer, item, job, and user-defined[1] – to determine the compensation calculation details for a salesperson's compensation line (a salesperson's compensation line is associated with a Business Central sales document line). Designing the matrix is the most intricate part of setting up the system.

[1] A user-defined value can be entered for a sales document line.

Example: your company supplies restaurants, and each of your customers is assigned to a delivery route, and compensation rates vary by route. You create a user-defined value to represent each route and assign the appropriate value to each customer. When a sales document is created, SavvyComp assigns the customer's user-defined value (route) to the document.

### Compensation Groups

Assigning compensation calculation details (rate type, rate % / rate amount, etc.) to every combination of salesperson, customer, item, and job in your system (setting aside jobs, user-defined values, and sales document line item types – G/L Accounts, Resources, etc.) would be onerous: if you have 10 salespeople, 200 customers, and 50 items, you'd have 100,000 [10*200*50] matrix lines to maintain! SavvyComp utilizes Compensation Groups to ease the burden.

#### *Salesperson Compensation Groups*

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

Example:

Your business sells office furniture in Knoxville, Tennessee, and your 10 salespeople fall into two compensation plans: reps are paid on one rate schedule and managers are paid on another. You'll need two Salesperson Compensation Groups: call them REP and MANAGER.

#### *Customer Compensation Groups*

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

Example:

Let's say your 200 customers fall into two categories for compensation: retail customers and wholesale customers. You'll need two Customer Compensation Groups: call them RETAIL and WHOLESALE.

### *Item Compensation Groups*

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

Example:

Let's say your 50 items fall into three categories for compensation: chairs, tables, and conference room bundles. You'll need three Item Compensation Groups: call them CHAIR, TABLE, and CONFERENCE.

Again, setting aside jobs, user-defined values, and other sales document line item types – G/L Accounts, Resources, etc. – you now have 12 [2*2*3] matrix lines to maintain rather than 100,000!

### *Job Compensation Groups*

Do you pay different rates for different jobs? If the answer is No, you'll only need one Job Compensation Group; otherwise, you'll need more – I think you get the idea.

### *User-Defined Compensation Groups*

Do you pay different rates for different user-defined values? Using the delivery route example, if the same driver sells the same items on two different routes, does the compensation rate vary? If the answer is No, then you only need one User-Defined Compensation Group; otherwise, you'll need more…

### *Group Assignments*

You've created your compensation groups and entered each group combination in the matrix along with the appropriate calculation details, but one more step is required for the salesperson compensation lines to calculate for a sales document line: you must assign the appropriate group to each salesperson, customer, item, job, and user-defined value.

## Wildcards

What if you don't utilize jobs, or you don't need user-defined value, or the compensation rate doesn't vary based on item, or customer, etc.? You're probably wonder why you need to set up compensation groups to handle scenarios that don't apply to you. Good news – you don't!

When you're entering group combinations into the matrix SavvyComp allows you to enter an asterisk (*) rather than a specific compensation group value. We refer to the * as a wildcard – it evaluates as "any group value".

Example:

Let's say you don't utilize jobs or user-define values.

When entering compensation groups in the matrix, you enter * in place of an actual Job Compensation Group or User-Defined Compensation Group.

Matrix Setup:

| Salesperson Comp Group | Customer Comp Group | Item Comp Group | Job Comp Group | User-Defined Comp Group | Row # |
|---|---|---|---|---|---|
| MANAGER | RETAIL | CHAIR | * | * | 1 |
| MANAGER | RETAIL | CONFERENCE | * | * | 2 |
| MANAGER | RETAIL | TABLE | * | * | 3 |
| MANAGER | WAREHOUSE | CHAIR | * | * | 4 |
| MANAGER | WAREHOUSE | CONFERENCE | * | * | 5 |
| MANAGER | WAREHOUSE | TABLE | * | * | 6 |
| REP | RETAIL | CHAIR | * | * | 7 |
| REP | RETAIL | CONFERENCE | * | * | 8 |
| REP | RETAIL | TABLE | * | * | 9 |
| REP | WAREHOUSE | CHAIR | * | * | 10 |
| REP | WAREHOUSE | CONFERENCE | * | * | 11 |
| REP | WAREHOUSE | TABLE | * | * | 12 |

Let's take our example to the next level. What if only 5 of your 200 customers are retail customers? Instead of assigning 195 customers to the WHOLESALE compensation group and 5 customers to the RETAIL compensation group, use the wildcard functionality to handle the bulk of the work:

Matrix Setup:

| Salesperson Comp Group | Customer Comp Group | Item Comp Group | Job Comp Group | User-Defined Comp Group | Row # |
|---|---|---|---|---|---|
| MANAGER | * | CHAIR | * | * | 1 |
| MANAGER | * | CONFERENCE | * | * | 2 |
| MANAGER | * | TABLE | * | * | 3 |
| MANAGER | RETAIL | CHAIR | * | * | 4 |
| MANAGER | RETAIL | CONFERENCE | * | * | 5 |
| MANAGER | RETAIL | TABLE | * | * | 6 |
| REP | * | CHAIR | * | * | 7 |
| REP | * | CONFERENCE | * | * | 8 |
| REP | * | TABLE | * | * | 9 |
| REP | RETAIL | CHAIR | * | * | 10 |
| REP | RETAIL | CONFERENCE | * | * | 11 |
| REP | RETAIL | TABLE | * | * | 12 |

You'll have the same number of rows in your matrix, but now you only assign a compensation group (RETAIL) to 5 customers – you don't have to touch the 195 warehouse customers.

When salesperson compensation lines are calculated for a sales document line whose Customer Compensation Group = RETAIL, the appropriate row in the matrix where Customer Compensation Group = RETAIL will be used (remember, a unique set of calculations details is assigned to each row of the matrix); otherwise the appropriate row in the matrix where Customer Compensation Group = * will be

used. You even get to decide the order in which the matrix lines are evaluated – see the SavvyComp Matrix Priority Setup section of this document.

To continue our example: What if managers are paid at the same rate for everything except conference bundles sold to retail customers? We only need two matrix lines for managers:

| Salesperson Comp Group | Customer Comp Group | Item Comp Group | Job Comp Group | User-Defined Comp Group | Row # |
|---|---|---|---|---|---|
| MANAGER | * | * | * | * | 1 |
| MANAGER | RETAIL | CONFERENCE | * | * | 2 |
| REP | * | CHAIR | * | * | 3 |
| REP | * | CONFERENCE | * | * | 4 |
| REP | * | TABLE | * | * | 5 |
| REP | RETAIL | CHAIR | * | * | 6 |
| REP | RETAIL | CONFERENCE | * | * | 7 |
| REP | RETAIL | TABLE | * | * | 8 |

You contract with consultants who help your customers design their office space. The consultants are paid a percentage of the hours that you charge for their services, sales reps are paid a fixed amount for every hour of their services since they upsold the customer for design services, and managers also get a cut.

If each consultant receives the same percentage (35%) of their billed time (the hourly rate could be different per consultant), sales reps receive the same amount per consulting hour ($5.25) for each consultant, and managers receive the same percentage (1.125% of margin), we'll need a new Salesperson Compensation Group – CONSULTANT – and a new Item Compensation Group – CONSULT LABOR:

| Salesperson Comp Group | Customer Comp Group | Item Comp Group | Job Comp Group | User-Defined Comp Group | Row # |
|---|---|---|---|---|---|
| CONSULTANT | * | CONSULT LABOR | * | * | 1 |
| MANAGER | * | * | * | * | 2 |
| MANAGER | * | CONSULT LABOR | * | * | 3 |
| MANAGER | RETAIL | CONFERENCE | * | * | 4 |
| REP | * | CHAIR | * | * | 5 |
| REP | * | CONFERENCE | * | * | 6 |
| REP | * | CONSULT LABOR | * | * | 7 |
| REP | * | TABLE | * | * | 8 |
| REP | RETAIL | CHAIR | * | * | 9 |
| REP | RETAIL | CONFERENCE | * | * | 10 |
| REP | RETAIL | TABLE | * | * | 11 |

You employ service techs who perform installation and repair work for your customers. You utilize Business Central Jobs for these services, billing via sales invoices.

If each tech receives a different rate for installation job billings (18%) versus repair job billings (15%), sales reps receive compensation only for installation jobs ($26.00 per job billing), and managers receive a percentage (2.25%) for jobs, we'll need a new Salesperson Compensation Group – TECH – and two Job Compensation Groups – INSTALL and REPAIR:

| Salesperson Comp Group | Customer Comp Group | Item Comp Group | Job Comp Group | User-Defined Comp Group | Row # |
|---|---|---|---|---|---|
| CONSULTANT | * | CONSULT LABOR | * | * | 1 |
| MANAGER | * | * | * | * | 2 |
| MANAGER | * | * | INSTALL | * | 3 |
| MANAGER | * | * | REPAIR | * | 4 |
| MANAGER | * | CONSULT LABOR | * | * | 4 |
| MANAGER | RETAIL | CONFERENCE | * | * | 5 |
| REP | * | * | INSTALL | * | 6 |
| REP | * | CHAIR | * | * | 7 |
| REP | * | CONFERENCE | * | * | 8 |
| REP | * | CONSULT LABOR | * | * | 9 |
| REP | * | TABLE | * | * | 10 |
| REP | RETAIL | CHAIR | * | * | 11 |
| REP | RETAIL | CONFERENCE | * | * | 12 |
| REP | RETAIL | TABLE | * | * | 13 |
| TECH | * | * | INSTALL | * | 14 |
| TECH | * | * | REPAIR | * | 15 |

Our matrix is nearly complete, we just need to account for your other business – restaurant supply. Your business services Atlanta, Georgia, and you have 3 delivery routes: Downtown, Midtown, and Buckhead. Each route driver is paid the same rate for sales on their routes except the Buckhead route (18% for Buckhead, 16% for the others), the sales rep for each restaurant is paid the same rate for all items (4% of margin), and managers receive a percentage (1.25% of margin).

Each route is set up as a SavvyComp user-defined value and assigned to the appropriate customers, and a delivery driver is assigned to each route (we'll expand on user-defined values later in this document). Let's say that the same rate is paid for all routes except for Buckhead. We need two new User-Defined Compensation Groups – REGULAR and BUCKHEAD. The BUCKHEAD group is assigned to the Buckhead route, and the REGULAR group is assigned to the other routes.

*Complete Matrix*

| Salesperson Comp Group | Customer Comp Group | Item Comp Group | Job Comp Group | User-Defined Comp Group | Row # |
|---|---|---|---|---|---|
| CONSULTANT | * | CONSULT LABOR | * | * | 1 |
| DRIVER | * | * | * | BUCKHEAD | 2 |
| DRIVER | * | * | * | REGULAR | 3 |
| MANAGER | * | * | * | * | 4 |
| MANAGER | * | * | * | BUCKHEAD | 5 |
| MANAGER | * | * | * | REGULAR | 6 |
| MANAGER | * | * | INSTALL | * | 7 |
| MANAGER | * | * | REPAIR | * | 8 |
| MANAGER | * | CONSULT LABOR | * | * | 9 |
| MANAGER | RETAIL | CONFERENCE | * | * | 10 |
| REP | * | * | * | BUCKHEAD | 11 |
| REP | * | * | * | REGULAR | 12 |
| REP | * | * | INSTALL | * | 13 |
| REP | * | CHAIR | * | * | 14 |
| REP | * | CONFERENCE | * | * | 15 |
| REP | * | CONSULT LABOR | * | * | 16 |
| REP | * | TABLE | * | * | 17 |
| REP | RETAIL | CHAIR | * | * | 18 |
| REP | RETAIL | CONFERENCE | * | * | 19 |
| REP | RETAIL | TABLE | * | * | 20 |
| TECH | * | * | INSTALL | * | 21 |
| TECH | * | * | REPAIR | * | 22 |

Note: you have several options to handle this example scenario. For instance, you could use different Salesperson Compensation Groups to differentiate restaurant sales reps from office sales reps, and you could use Customer Compensation Groups to differentiate restaurant customers from office customers. You'll need to evaluate your needs to streamline the setup for your business.

## Compensation Rate Types

Now that you've created your matrix, you need to assign compensation rates to each matrix line. Currently, SavvyComp allows you to enter one rate type and rate % or rate amount (depending on rate type), per currency code, for a matrix line.

SavvyComp Rate Types:

- No Comp. – no rate % or rate amount may be entered
- Percent of Comp. Sale Amount – enter a Rate %
- Percent of Comp. Margin Amount – enter a Rate %
- Flat Amount – enter a Rate Amount
- Amount Per Selling Unit – enter a Rate Amount
- Amount Per Base Unit – enter a Rate Amount

For each salesperson compensation line, SavvyComp determines the Compensation Unit Sale Amount, Compensation Unit Cost Amount, and Compensation Quantity (typically these are based on the sales document line's unit price, unit cost, and quantity, but they can be manually edited).

The salesperson compensation line fields relevant to Rate Type are determined as follows:

- Compensation Line Sale Amount is set to Compensation Unit Sale Amount * Compensation Quantity.
- Compensation Line Cost Amount is set to Compensation Unit Cost Amount * Compensation Quantity.
- Compensation Line Margin Amount is set to Compensation Line Sale Amount - Compensation Line Cost Amount.
- Compensation Base Quantity is calculated from Compensation Quantity, the sales document lines Unit of Measure, and the item's Sales Unit of Measure (example: Item 1900-S has Sales Unit of Measure = PCS, and a sale document has Quantity = 3 and Unit of Measure = BOX, where 1 BOX = 5 PCS. Base Quantity = 3 * 5 = 15).

Using the Standard calculation type (see SavvyComp Compensation Matrix Setup for details), compensation amounts are calculated as follows:

- If rate type = **No Comp,** the salesperson compensation line's Compensation Amount = 0.
- If rate type = **Percent of Comp. Sale Amount,** the salesperson compensation line's Compensation Amount = Compensation Line Sale Amount * Rate %.
- If rate type = **Percent of Comp. Margin Amount,** the salesperson compensation line's Compensation Amount = Compensation Line Margin Amount * Rate %.
- If rate type = **Flat Amount** the salesperson compensation line's Compensation Amount = Rate Amount.
- If rate type = **Amount Per Selling Unit,** the salesperson compensation line's Compensation Amount = Compensation Quantity * Rate Amount.
- If rate type = **Amount Per Base Unit,** the salesperson compensation line's Compensation Amount = Compensation Base Quantity * Rate Amount.

### *Compensation Rates*

We stated the compensation rates for consulting time, delivery routes, and installation & repair routes.

We didn't specify the rates for reps and managers for office furniture sales, so let's say they're paid the following rates:

| Comp Recipient Type | Customer Type | Item Type | Rate |
|---|---|---|---|
| Sales reps | Wholesale | Chairs | $3.15 per base unit |
| Sales reps | Wholesale | Conference room bundles | 8.8% of margin |
| Sales reps | Wholesale | Tables | $6.00 per selling unit |
| Sales reps | Retail | Chairs | $4.25 per base unit |
| Sales reps | Retail | Conference room bundles | 10% of margin |
| Sales reps | Retail | Tables | $7.45 per selling unit |
| Managers | Wholesale | Chairs | 1% of margin |
| Managers | Wholesale | Conference room bundles | 1% of margin |
| Managers | Wholesale | Tables | 1% of margin |
| Managers | Retail | Chairs | 1% of margin |
| Managers | Retail | Conference room bundles | 1.5% of margin |
| Managers | Retail | Tables | 1% of margin |

Note: the compensation rate types and rates in this example were selected to illustrate the range of options available, rather than to model real-world scenarios.

## Complete Matrix & Rates

| Salesperson Comp Group | Customer Comp Group | Item Comp Group | Job Comp Group | User-Defined Comp Group | Rate Type | Rate % | Rate Amt |
|---|---|---|---|---|---|---|---|
| CONSULTANT | * | CONSULT LABOR | * | * | % of Comp Sale Amt | 35% | |
| DRIVER | * | * | * | BUCKHEAD | % of Comp Sale Amt | 18% | |
| DRIVER | * | * | * | REGULAR | % of Comp Sale Amt | 16% | |
| MANAGER | * | * | * | * | % of Comp Margin Amt | 1% | |
| MANAGER | * | * | * | BUCKHEAD | % of Comp Margin Amt | 1.25% | |
| MANAGER | * | * | * | REGULAR | % of Comp Margin Amt | 1.25% | |
| MANAGER | * | * | INSTALL | * | % of Comp Sale Amt | 2.25% | |
| MANAGER | * | * | REPAIR | * | % of Comp Sale Amt | 2.25% | |
| MANAGER | * | CONSULT LABOR | * | * | % of Comp Margin Amt | 1.125% | |
| MANAGER | RETAIL | CONFERENCE | * | * | % of Comp Margin Amt | 1.5% | |
| REP | * | * | * | BUCKHEAD | % of Comp Margin Amt | 4% | |
| REP | * | * | * | REGULAR | % of Comp Margin Amt | 4% | |
| REP | * | * | INSTALL | * | Flat Amount | | 26.00 |
| REP | * | CHAIR | * | * | Amt Per Base Unit | | 3.15 |
| REP | * | CONFERENCE | * | * | % of Comp Margin Amt | 8.8% | |
| REP | * | CONSULT LABOR | * | * | Amt Per Base Unit | | 5.25 |
| REP | * | TABLE | * | * | Amt Per Selling Unit | | 6.00 |
| REP | RETAIL | CHAIR | * | * | Amt Per Base Unit | | 4.25 |
| REP | RETAIL | CONFERENCE | * | * | % of Comp Margin Amt | 10% | |
| REP | RETAIL | TABLE | * | * | Amt Per Selling Unit | | 7.45 |
| TECH | * | * | INSTALL | * | % of Comp Sale Amt | 18% | |
| TECH | * | * | REPAIR | * | % of Comp Sale Amt | 15% | |

## Who Receives Compensation

### Compensation Document

For each Business Central sales document whose Document Type has been set up to create compensation, SavvyComp creates a Compensation Document. This document includes the information from the sales document and sales document lines, plus information from various SavvyComp setups. You can override information on the compensation document without affecting the sales document. For example, you could override the job assignment, used-defined code, territory (Business Central includes territories but no way to assign them to sales documents, so SavvyComp provides that functionality) and salesperson code per document line (SavvyComp copies the sales document's salesperson to each compensation document line).

If the Compensate salesperson assigned to sales document header option = True in your SavvyComp setup, the salesperson assigned to each compensation document line will be compensated (as you just read, you can override this salesperson per document line, so you could potentially compensate a different salesperson for each line).

### Additional Salesperson Assignments

SavvyComp also allows you to assign multiple salespeople to individual customers, items, jobs, user-defined codes, and territories. These salespeople receive compensation 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 compensation when a sales document is created for that customer.

Two typical scenarios for assigning salespeople to an item[1] are as follows:

- Product managers assigned to each item for which they are responsible so that they are compensated each time one of their items appears on a sales document.

- External persons or companies who are paid each time one of their items appears on a sales document. You could assign a salesperson to a Business Central Resource, so they are compensated whenever their resource item is billed, or you could assign a royalty recipient to an Item.

[1] Business Central sales documents may include lines of the following types:

- G/L Account
- Item
- Resource
- Fixed Asset
- Charge (Item)

Salespeople may be assigned to any of the above entities.

A typical scenario for assigning salespeople to a user-defined code is as follows:

- Groups of customers are assigned to a delivery route, and the delivery drivers are compensated for sales to customers on their routes. By creating a user-defined code per route and assigning a route to appropriate customers and assigning salespeople to different routes, it's easy to manage the compensation requirements as both routes and drivers change over time.

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

- A Sales Manager assigned to a territory so that they are compensated each time a sales document is created for their territory.

- Multiple salespeople "share" a territory and all receive compensation when a sales document is created for their territory.

The same salesperson may be assigned to any combination of the above entities. For example, a salesperson code = AH could be assigned to customer = 1000 and to territory = NE and directly to the sales document. What happens if you create a sales document for this customer and assign this territory to a document line? That depends – if the Salesperson may be compensated multiple times per document line option is set to True in your SavvyComp setup, Annette will be compensated three times for the line; otherwise, she'll be compensated once. Since the different assignments may drive different compensation calculations, which setup is used? SavvyComp utilizes priority functionality (much like the matrix priority) – see Salesperson From Priority Setup for details.

## Compensation Splits

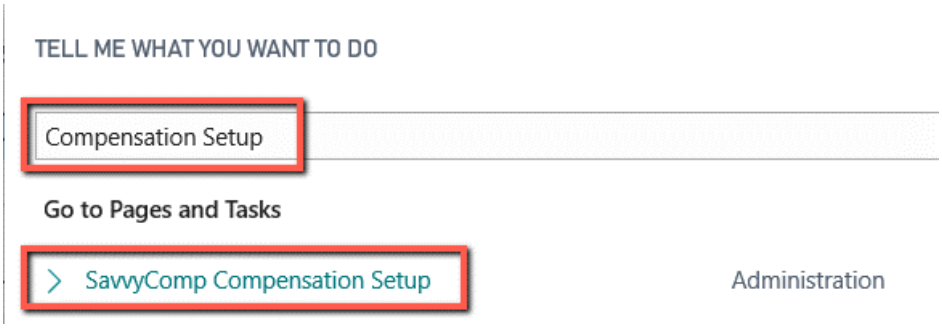
In many compensation systems, a total compensation amount is calculated for a sales document and that total may then be distributed (split) to multiple salespeople. Since SavvyComp calculates compensation independently for each salesperson for each sales document line item, and each salesperson may have a different compensation rate for each line item, there is no pre-determined total compensation amount for the sales document. Therefore, splits in SavvyComp modify the salesperson's compensation quantity. This allows compensation to be reduced when the compensation rate type = Amount Per Unit or Amount Per Base Unit.

Example: AH receives 10% of the margin of an item, and her split = 30% for a sales document line, whose quantity = 3, unit price = $100.00, and unit cost = $60.00. Her compensation quantity = (3 * .30) = .9, her compensation line sale amount = (100 * .9) = $90.00, her compensation line cost amount = (60 * .9) = $54.00, her compensation line margin amount = (90 – 54) = $36.00, and her compensation amount = (36 * .10) = $3.60.

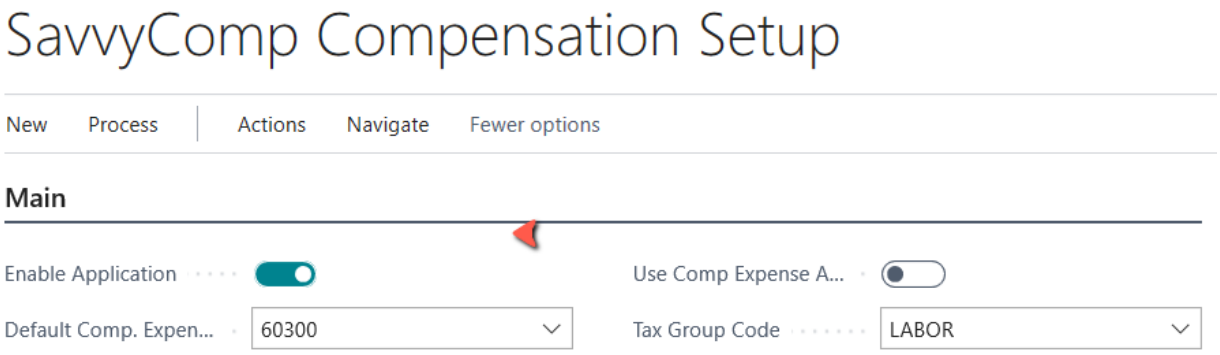
## SavvyComp Compensation Setup

### Navigation

Search for **Compensation Setup**:




### Main

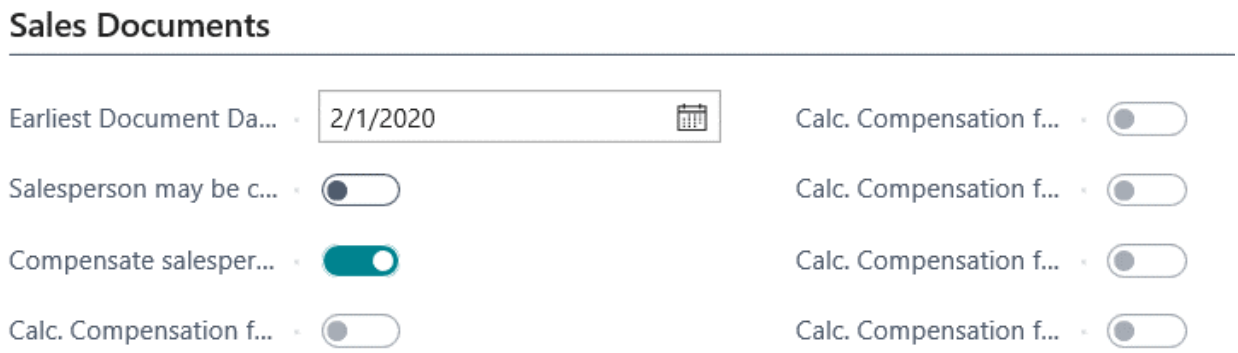



Once SavvyComp is set up and you're ready to begin creating compensation documents, set the **Enable Application** option to True. While the option is set to False, no compensation records will be created.

In a future SavvyComp version, we'll add the ability to create Business Central purchase documents to pay compensation to your salespeople. That functionality will use the following options:

- **Default Comp. Expense Account** – if a compensation expense account isn't assigned to a salesperson, we'll use the default expense account when creating purchase documents.
- **Use Comp Expense Account Tax Group Code** – set to True to use the tax group code assigned to the default expense account; set to False to designate a specific tax group code.
- **Tax Group Code** – specify a tax group code to be used when creating purchase documents to pay salesperson compensation.

## Sales Documents




When switching from a different sysem to SavvyComp, you'll need to set the **Earliest Document Date**. SavvyComp won't create compensation records for sales documents whose document date falls before this date. This reduces the likelihood of double paying a salesperson.

**Salesperson may be compensated multiple times per sales document line**: SavvyComp allows you to assign salespeople to customers, items, jobs, territories, and user-defined values. If the same salesperson is assigned to multiple entities that appear on a sales document or document line, they will be compensated multiple times if the option is set to True; they'll be paid only once if the option is set to False.

Example:

Assume the following:

- Salesperson Code AH is assigned to item 1900-S (via page SavvyComp Item Salesperson Assignment).
- Salesperson Code AH is assigned to sales invoice S-INV102250.
- Invoice S-INV102250 includes a line for item 1900-S.

If **Salesperson may be compensated multiple times per sales document line** is set to True, AH be compensated twice for the sales document line; otherwise, she'll be compensated once.

### *Document Types*

Currently, compensation records may be created for Posted Sales Invoices and Posted Credit Memos; a future SavvyComp version will allow compensation to calculated for the following unposted sales document types:

- Orders
- Blanket Orders
- Invoices
- Return Orders
- Credit Memos

At that time, the associated Calc. Compensation For… options will be enabled.

## Sales Document Line Types

When you create a line on a Business Central sales document, you choose one of the following item types:

- Comment
- G/L Account
- Item
- Resource
- Fixed Asset
- Charge (Item)

SavvyComp supports all items types other than Comment, as a comment line contains no quantity, price, or cost. For each item type, you determine if a compensation amount is calculated. If you choose to not calculate compensation for an item type, compensation records will still be created but the compensation rate type will be set to No Compensation and the compensation amount will be set to zero.

The following attributes may be assigned per entity (G/L Account, Item, Resource, Charge Item, Fixed Asset - See the SavvyComp Item Setup section of this document for more details regarding item-specific setups):

- Compensation Sale Amount From (ex: Unit Price or Line Amount / Quantity)
- Compensation Sale Amount Multiplier (allows you to decrease / increase the calculated amount by a fixed %)
- Compensation Cost Amount From (ex: Unit Cost or List Cost)
- Compensation Cost Amount Multiplier (allows you to decrease / increase the calculated amount by a fixed %)

Example:

For item 1900-S, assume the following setup:

- Compensation Sale Amount From = Line Amount / Quantity (allows document line discounts to affect the Compensation Unit Sale Amount)
- Compensation Sale Amount Multiplier = 90 (allows us to reduce the Compensation Unit Sale Amount for some overhead)
- Compensation Cost Amount From = List Cost
- Compensation Cost Amount Multiplier = 100

Assume invoice S-INV10225 includes a line for item 1900-S, with Quantity = 3, Unit Price = Price Excl. Tax = 192.80, Line Discount % = 10, Line Amount Excl. Tax = 347.04, and Unit Cost = 110.00 (it was manually changed from 150.30).

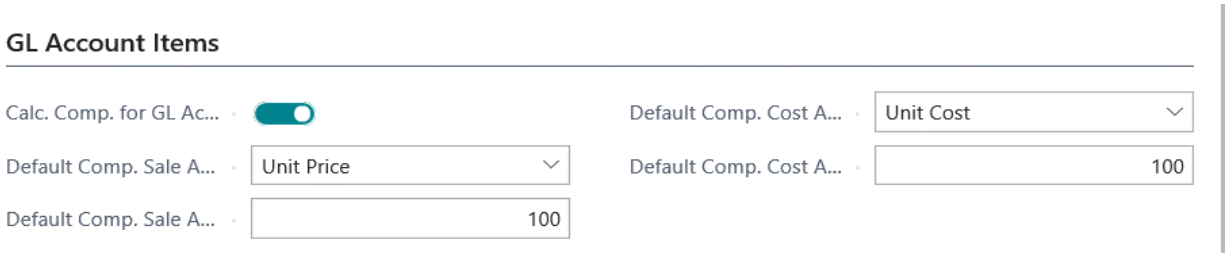
The compensation line is calculated as follows:

- Compensation Unit Sale Amount:
    - Calculation: (347.04 / 3) * 90/100 = 115.68 * .9 = 104.11
- Compensation Unit Cost Amount:

- Since Compensation Cost Amount From = List Cost, we look at the Item Card for the item. The Costing Method is not set to Standard, so we set List Cost to the Item Card's Unit Cost (150.30 in this example).
- Calculation: (150.30 / 3) * 100/100 = 50.10

SavvyComp does not require you to create an item-specific setup for each G/L Account, Item, Resource, etc. When compensation is calculated for a sales document line item for which an item-specific setup does not exist, we use the default setup for the item type:

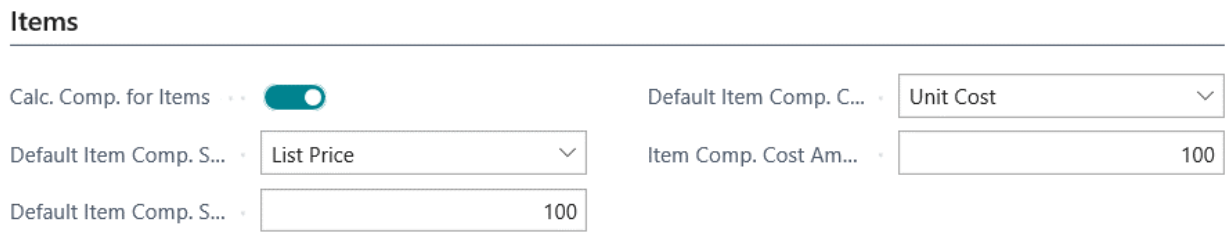
*GL Account Items*




Set **Calc. Comp for GL Accounts** to True to calculate a compensation amount when a G/L Account appears on a sales document line.

Enter default compensation sale and cost setups.

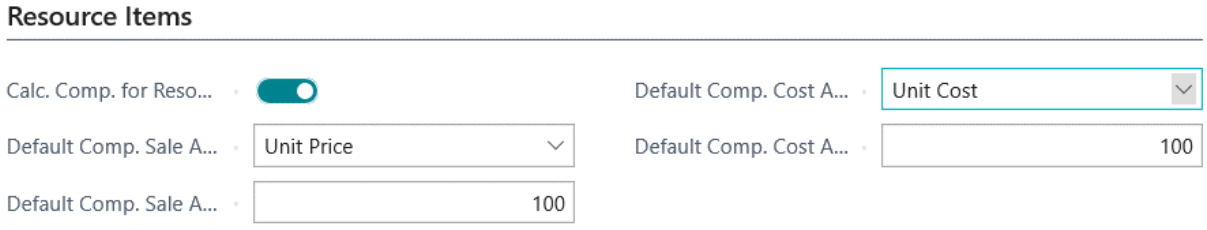
*Items*




Set **Calc. Comp. for Items** to True to calculate a compensation amount when an Item (an entity that can be displayed in the Item Card page) appears on a sales document line.

Enter default compensation sale and cost setups.

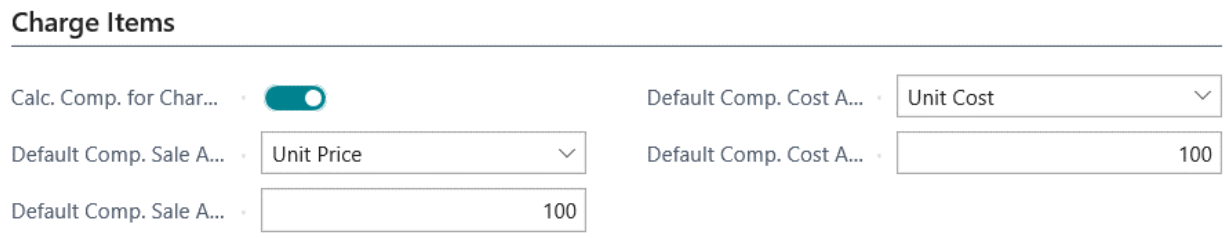
*Resource Items*




Set **Calc. Comp. for Resources** to True to calculate a compensation amount when a Resource appears on a sales document line.

Enter default compensation sale and cost setups.

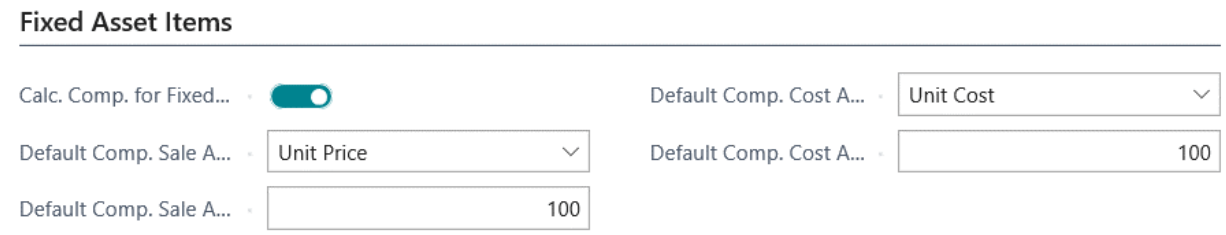
*Charge Items*




Set **Calc. Comp. for Charges** to True to calculate a compensation amount when an Item Charge appears on a sales document line.

Enter default compensation sale and cost setups.

*Fixed Asset Items*



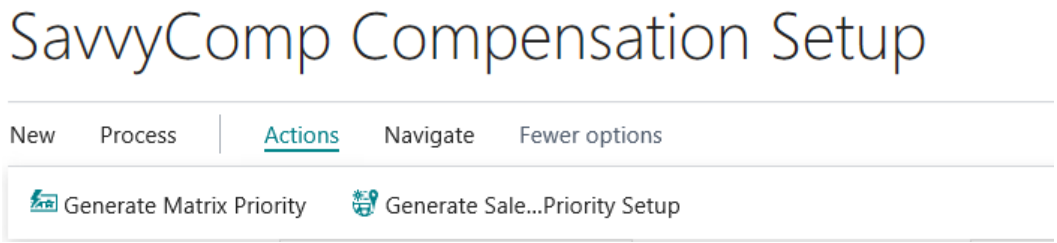

Set **Calc. Comp. for Fixed Assets** to True to calculate a compensation amount when a Fixed Asset appears on a sales document line.

Enter default compensation sale and cost setups.

## Number Series

In a future SavvyComp version, we'll add the ability to create Business Central purchase documents to pay compensation to your salespeople. That functionality will use the number series.

## Actions




Select **Generate Matrix Priority** to create the initial Matrix Priority Setup based on your Earliest Document Date.

Select **Generate Salesperson From Priority Setup** to create the initial Salesperson From Priority Setup based on your Earliest Document Date.

## Navigate

Select **Matrix Priority Setup** to open page SavvyComp Compensation Matrix Priority Setup

Select **Salesperson From Priority Setup** to open page SavvyComp Salesperson From Matrix Priority Setup.

## SavvyComp Compensation Group Setup

### Navigation

Search for **Compensation Group Setup**:

### Entry

SAVVYCOMP COMPENSATION GROUP SETUP | WORK DATE: 5/1/2020

Search | New | Edit List | Delete | Page

| Type | Code | Description |
|---|---|---|
| Salesperson | MANAGER | sales managers |
| Salesperson | REP | sales reps |
| Customer | RETAIL | retail customers |
| Customer | WHOLESALE | wholesale customers |
| Item | BOARD | boards |
| Item | CHAIR | chairs |
| Item | CONFERENCE | conference packages |
| Item | CONSULT LABOR | consulting labor |
| Item | DESK | desks |
| Item | LAMP | lamps |
| Item | NO COMP | no compensation paid |
| Item | TABLE | tables |
| Job | INSTALL | installation jobs |
| Job | REPAIR | repair jobs |
| User-Defined | BOSTON | Boston delivery routes |
| User-Defined | CHICAGO | Chicago delivery routes |

Compensation groups may be created for the following entity types:

- Salesperson
- Customer
- Item
- Job
- User-Defined

Create the required compensation groups for each entity type. A compensation group may be deleted until it is in use, meaning that it appears in a compensation matrix setup, it has been assigned to salesperson, customer, item [1], job, or user-defined value, or it appears on a compensation document.

[1] Business Central sales documents may include lines of the following types

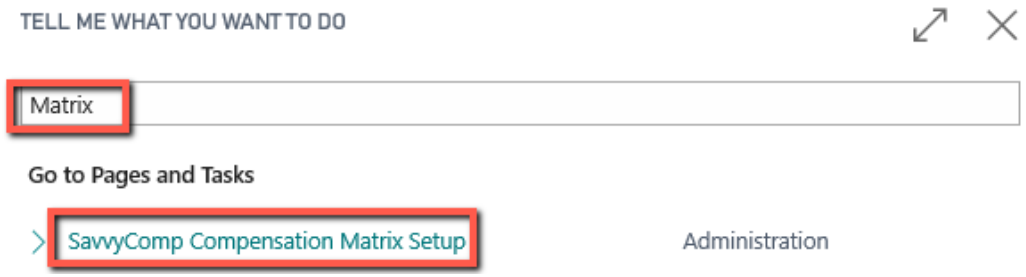
- G/L Account
- Item
- Resource
- Fixed Asset
- Charge (Item)

Therefore, a compensation group of type Item may be assigned to any of the above entities.

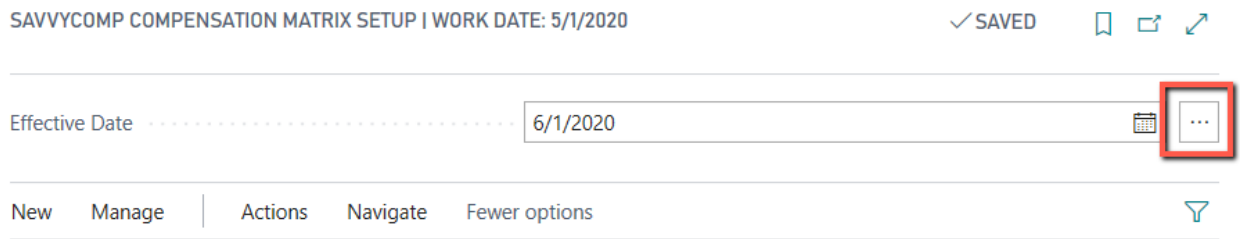
## SavvyComp Compensation Matrix Setup

### Navigation

Search for **Matrix**:




### Effective Date




Compensation matrix lines are entered for an **Effective Date**. Choose the **Date Lookup button** to select from a list of existing matrix setup dates.

When compensation documents are created for a sales document, the matrix setup for the latest effective date that falls on or before the sales document's Document Date will be used. Once an effective date is assigned to a compensation document, the matrix setup may not be edited or deleted.

## Matrix Lines

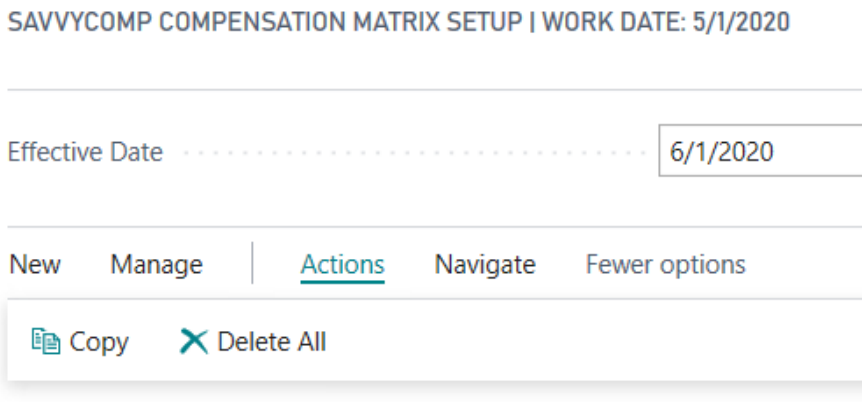
| Salesperson Comp. Group | Customer Comp. Group | Item Comp. Group | Job Comp. Group | User Defined Comp. Group | Calcul... Comp. when margin is negati... | Calculation Type |
|---|---|---|---|---|---|---|
| REP | * | * | * | BUCKHEAD | ☐ | Standard |
| REP | * | * | * | REGULAR | ☐ | Standard |
| REP | * | * | INSTALL | * | ☐ | Standard |
| REP | * | CHAIR | * | * | ☐ | Standard |
| REP | * | CONFERENCE | * | * | ☐ | Standard |
| REP | * | CONSULT LABOR | * | * | ☐ | Standard |
| REP | * | TABLE | * | * | ☐ | Standard |
| REP | RETAIL | CHAIR | * | * | ☐ | Standard |
| REP | RETAIL | CONFERENCE | * | * | ☐ | Standard |
| REP | RETAIL | TABLE | * | * | ☐ | Standard |

Create a matrix line for each combination of Salesperson Compensation Group, Customer Compensation Group, Item Compensation Group, Job Compensation Group, and User-Defined Compensation Group that drives a particular rate structure (see Designing the Compensation Matrix for details and examples).

**Calculate Comp. when margin is negative:**
By default, the compensation amount will be set to zero if the margin of a sales document line is negative. If you wish to pay compensation when the margin is negative, mark the checkbox.

**Calculation Type:**
Currently, Standard is the only available option, which means that for a matrix line you can choose a single rate type and rate % / rate amount (more on that in the next section). A future version of SavvyComp will offer additional Calculation Types allowing for more complex calculations.

## Actions



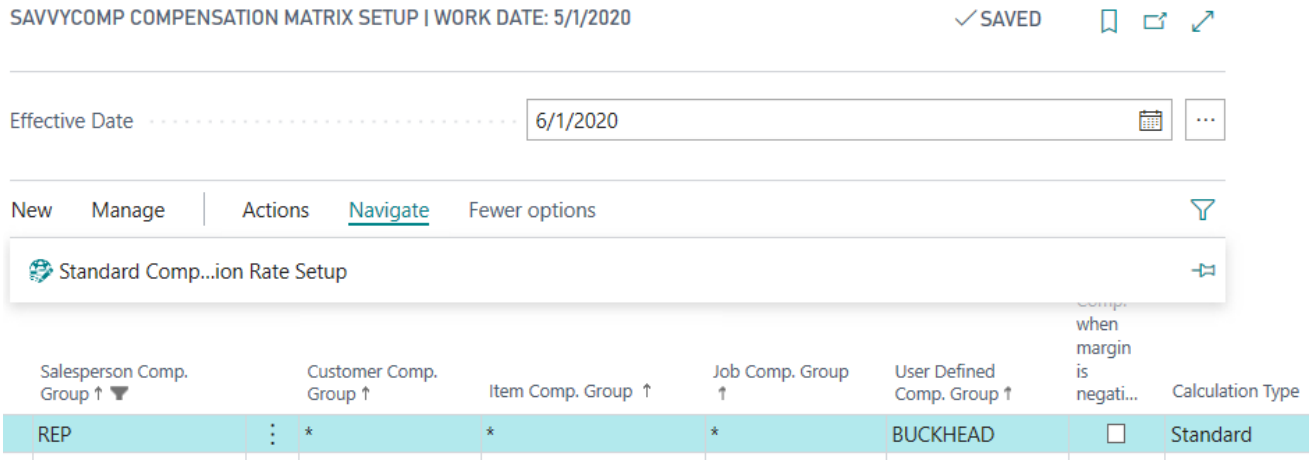

### *Copy*

When your compensation structure changes, you'll need to create a new matrix setup for a new effective date. Rather than re-entering the setup by hand, use the Copy functionality to copy an existing matrix setup (and related rate setups) to a new effective date, then use the Date Lookup button to display the setup for the new effective date. Edit the matrix setup according to your new compensation structure.

### *Delete All*

Deletes all matrix lines (and related rate setups) for the effective date.

## Navigate

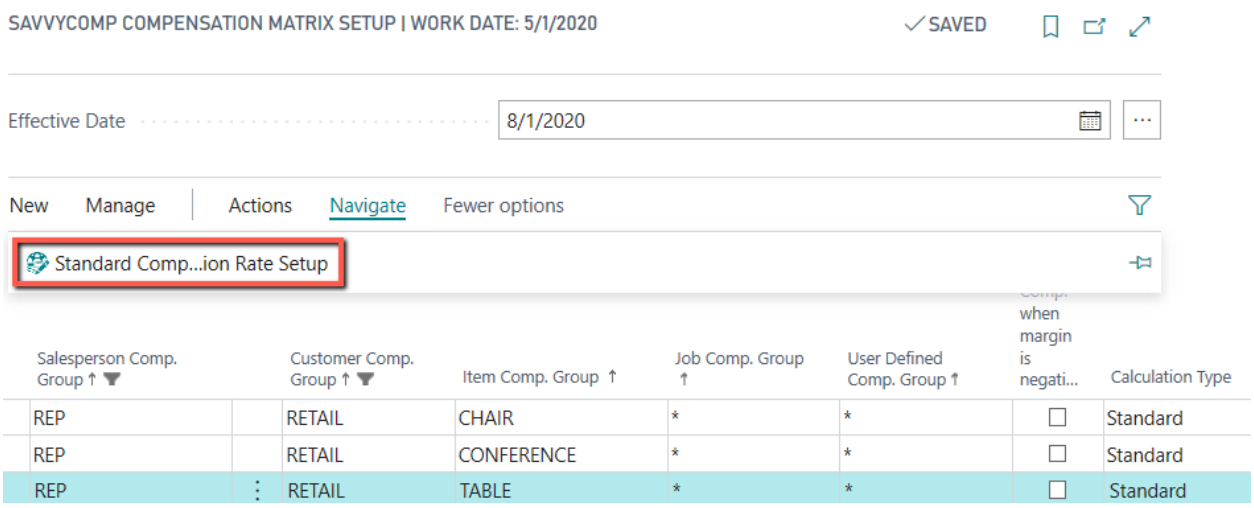



For each matrix line, select Standard Compensation Rate Setup to enter the rate setup for the line (see SavvyComp Standard Compensation Rate Setup for details).

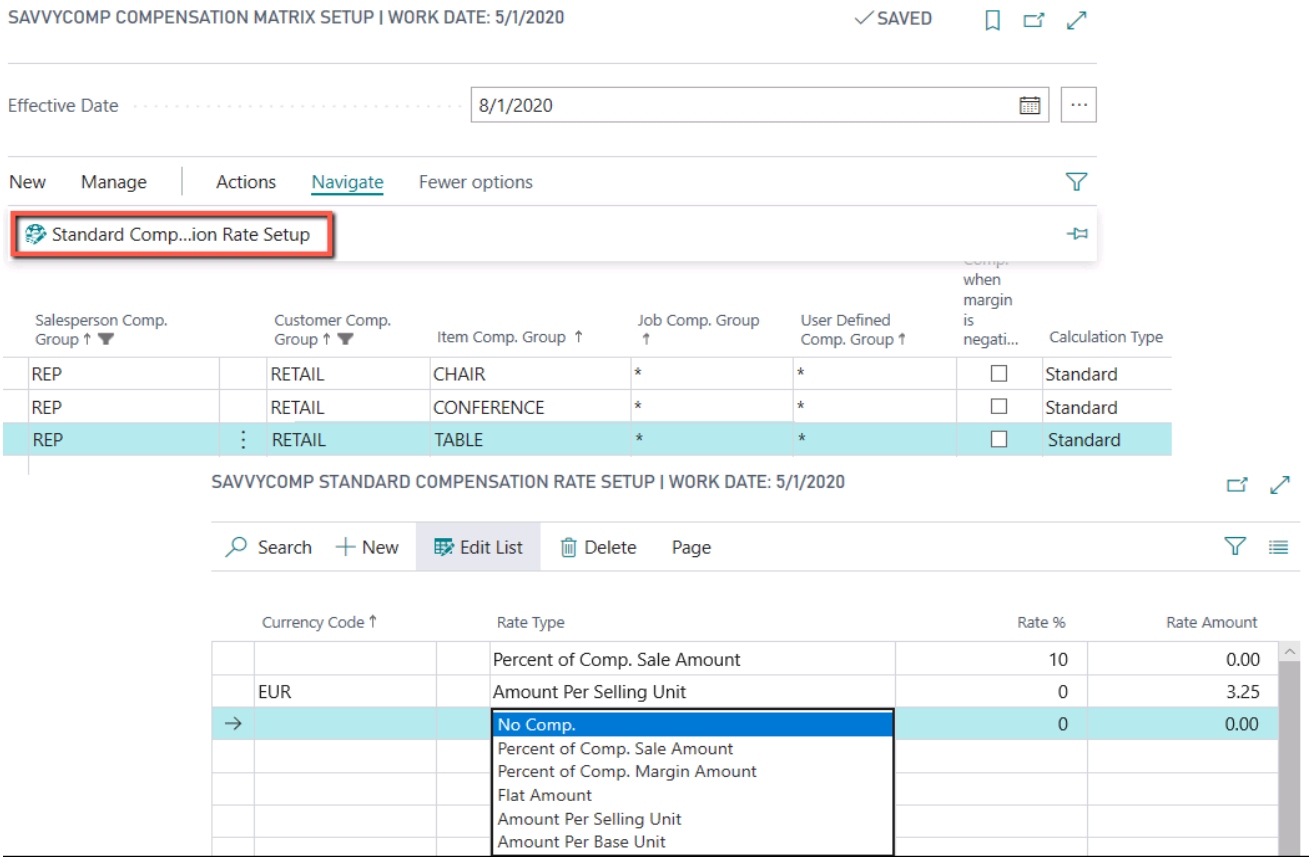
## SavvyComp Standard Compensation Rate Setup

### Navigation

SavvyComp Compensation Matrix Setup > Navigate > Standard Compensation Rate Setup:




### Entry




For **Currency Code** = blank, enter a **Rate Type** and **Rate %** or **Rate Amount**.

### *Rate Types*

SavvyComp supports the following compensation rate types (see Designing the Compensation Matrix > Compensation Rate Types for details):

- No Comp. – no rate % or rate amount may be entered
- Percent of Comp. Sale Amount – enter a Rate %
- Percent of Comp. Margin Amount – enter a Rate %
- Flat Amount – enter a Rate Amount
- Amount Per Selling Unit – enter a Rate Amount
- Amount Per Base Unit – enter a Rate Amount

### *Currencies*

You may choose to create setups for additional currencies. If a salesperson is compensated in a currency other than your local currency (LCY Code in page General Ledger Setup), you'll need to create rate setups for that currency.

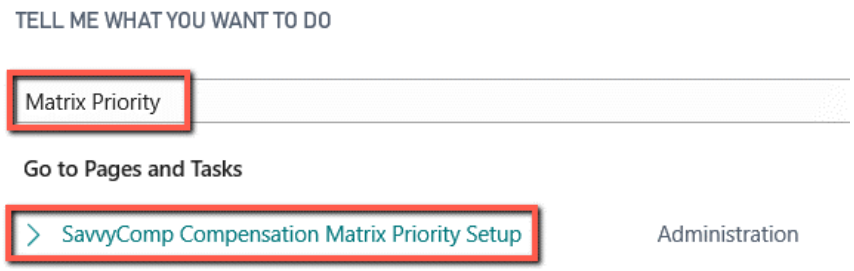
## SavvyComp Compensation Matrix Priority Setup

### Navigation

SavvyComp Compensation Matrix Setup > Navigate > Matrix Priority Setup

Or…

Search for **Matrix Priority:**



## Entry

SAVVYCOMP COMPENSATION MATRIX PRIORITY SETUP | WORK DATE: 5/1/2020

Effective Date 2/2/2020

New | Actions | Fewer options

| Priority ↑ | Salesperson Comp. Group Type | Customer Comp. Group Type | Item Comp. Group Type | Job Comp. Group Type | User-Defined Comp. Group Type |
|---|---|---|---|---|---|
| 2 | Specific | Specific | Specific | Specific | * |
| 3 | Specific | Specific | Specific | * | Specific |
| 4 | Specific | Specific | * | Specific | Specific |
| 5 | Specific | * | Specific | Specific | Specific |
| 6 | * | Specific | Specific | Specific | Specific |
| 7 | Specific | Specific | Specific | * | * |
| 8 | Specific | Specific | * | Specific | * |
| 9 | Specific | * | Specific | Specific | * |
| 10 | * | Specific | Specific | Specific | * |
| 11 | Specific | Specific | * | * | Specific |
| 12 | Specific | * | Specific | * | Specific |
| 13 | * | Specific | Specific | * | Specific |
| 14 | Specific | * | * | Specific | Specific |
| 15 | * | Specific | * | Specific | Specific |
| 16 | * | * | Specific | Specific | Specific |
| 17 | Specific | Specific | * | * | * |
| 18 | Specific | * | Specific | * | * |
| 19 | * | Specific | Specific | * | * |
| 20 | Specific | * | * | Specific | * |
| 21 | * | Specific | * | Specific | * |
| 22 | * | * | Specific | Specific | * |
| 23 | Specific | * | * | * | Specific |
| 24 | * | Specific | * | * | Specific |
| 25 | * | * | Specific | * | Specific |
| 26 | * | * | * | Specific | Specific |
| 27 | Specific | * | * | * | * |
| 28 | * | Specific | * | * | * |
| 29 | * | * | * | * | Specific |
| 30 | * | * | * | * | * |

When the page opens, the setup for the latest Effective Date is displayed. If no setup is displayed, generate the initial matrix priority setup.

### *Priority Usage*

When you create compensation matrix lines, SavvyComp allow you to enter * in any of the five …Group fields. * acts as a wildcard - see Designing the Compensation Matrix > Wildcards for details.

The matrix priority setup allows you to dictate the order in which matrix rows are evaluated to determine the calculation details (calculation type, compensation type and rate, etc.) for a given salesperson compensation document line. Given a five-dimensional matrix, we have thirty possible combinations of Specific (evaluates as "the exact input group value") and * (evaluates as "any group value").

### Example

Example: Assume we have the following matrix setup:

| Salesperson Comp. Group | Customer Comp. Group | Item Comp. Group | Job Comp. Group | User Defined Comp. Group | is negati... | Calculation Type |
|---|---|---|---|---|---|---|
| CONSULTANT | * | CONSULT LABOR | * | * | ☐ | Standard |
| DRIVER | * | * | * | BUCKHEAD | ☐ | Standard |
| DRIVER | * | * | * | REGULAR | ☐ | Standard |
| MANAGER | * | * | * | * | ☐ | Standard |
| MANAGER | * | * | * | BUCKHEAD | ☐ | Standard |
| MANAGER | * | * | * | REGULAR | ☐ | Standard |
| MANAGER | * | * | INSTALL | * | ☐ | Standard |
| MANAGER | * | * | REPAIR | * | ☐ | Standard |
| MANAGER | * | CONSULT LABOR | * | * | ☐ | Standard |
| MANAGER | RETAIL | CONFERENCE | * | * | ☐ | Standard |
| REP | * | * | * | BUCKHEAD | ☐ | Standard |
| REP | * | * | * | REGULAR | ☐ | Standard |
| REP | * | * | INSTALL | * | ☐ | Standard |
| REP | * | CHAIR | * | * | ☐ | Standard |
| REP | * | CONFERENCE | * | * | ☐ | Standard |
| REP | * | CONSULT LABOR | * | * | ☐ | Standard |
| REP | * | TABLE | * | * | ☐ | Standard |
| REP | RETAIL | CHAIR | * | * | ☐ | Standard |
| REP | RETAIL | CONFERENCE | * | * | ☐ | Standard |
| REP | RETAIL | TABLE | * | * | ☐ | Standard |
| TECH | * | * | INSTALL | * | ☐ | Standard |
| TECH | * | * | REPAIR | * | ☐ | Standard |

Let's say our salesperson compensation document line has the following compensation groups:

| Salesperson Comp Group | Customer Comp Group | Item Comp Group | Job Comp Group | User-Defined Comp Group |
|---|---|---|---|---|
| REP | RETAIL | CHAIR | INSTALL | REGULAR |

Using the above matrix priority setup, the highest priority (lowest Priority value) is for specific values for all five groups, so we look for a matrix line that exactly matches all five of the groups from our salesperson compensation document line. No match is found, so we move on to the second highest

priority, which is specific values for every group except User-Defined Comp Group, so we look for a row in the matrix that matches the following:

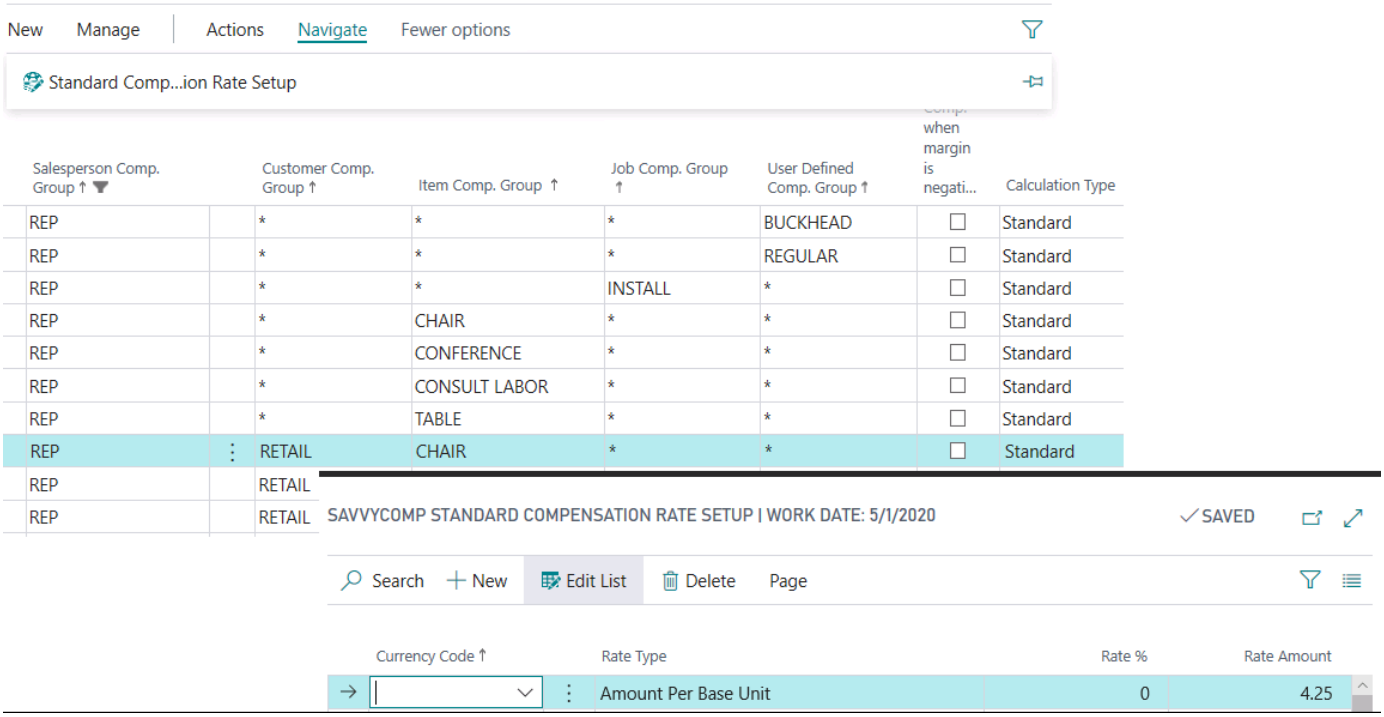
| Salesperson Comp Group | Customer Comp Group | Item Comp Group | Job Comp Group | User-Defined Comp Group |
|---|---|---|---|---|
| REP | RETAIL | CHAIR | INSTALL | * |

No match is found, so we continue down the priority setup. We don't find a match until we reach Priority = 7:

| Priority | Salesperson Comp. Group Type | Customer Comp. Group Type | Item Comp. Group Type | Job Comp. Group Type | User-Defined Comp. Group Type |
|---|---|---|---|---|---|
| 6 | * | Specific | Specific | Specific | Specific |
| 7 | Specific | Specific | Specific | * | * |
| 8 | Specific | Specific | * | Specific | * |

A matrix line matches our matrix priority setup where Priority = 7:

| Salesperson Comp Group | Customer Comp Group | Item Comp Group | Job Comp Group | User-Defined Comp Group |
|---|---|---|---|---|
| REP | RETAIL | CHAIR | * | * |




The rate for our compensation document line is $4.25 per base unit.

### *Priority Reorder*

You cannot add or remove priority lines, but you can change the priority of a line. Let's say that you'd like to evaluate the line where only the Salesperson and Item groups are specified (currently set to Priority = 17) before the line where the Salesperson, Customer, and Item groups are specified (currently set to Priority = 7):

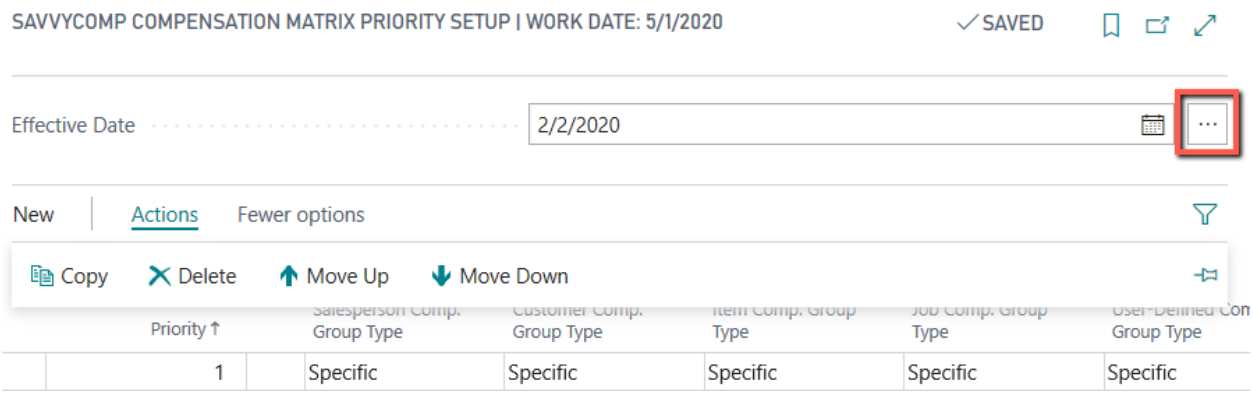
| | | | | | | |
|---|---|---|---|---|---|---|
| 7 | ⋮ | Specific | Specific | Specific | * | * |
| 17 | ⋮ | Specific | Specific | * | * | * |

You can set the Priority = 7 for the line where only the Salesperson and Item groups are specified, and the remaining lines will be reordered (the line where Priority currently = 7 will become 8, 8 will become 9, and so on).

| | | | | | | |
|---|---|---|---|---|---|---|
| 6 | | * | Specific | Specific | Specific | Specific |
| 7 | ⋮ | Specific | Specific | * | * | * |
| 8 | | Specific | Specific | Specific | * | * |
| 9 | | Specific | Specific | * | Specific | * |

When compensation documents are created for a sales document, the matrix priority setup for the latest effective date that falls on or before the sales document's Document Date will be used. Once an effective date is assigned to a compensation document, the matrix priority setup may not be edited or deleted.

## Actions




### *Copy*

When your compensation structure changes, you may need to modify your matrix priority settings. Use the Copy functionality to copy an existing matrix priority setup to a new effective date, then use the Date Lookup button to display the setup for the new effective date. Edit the setup according to your new compensation structure.

### *Delete*

You can delete a matrix priority setup unless either of the following conditions is true:

1. The setup's Effective Date is in use.
2. The setup's Effective Date matches the Earliest Document Date in page SavvyComp Compensation Setup.

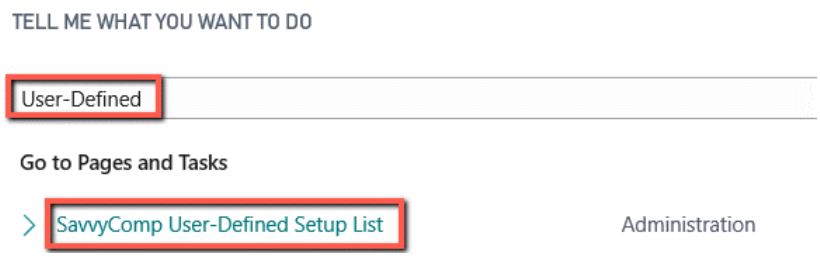
### *Move Up / Move Down*

Repositions the selected matrix priority line, reordering the Priority values.

## SavvyComp User-Defined Setup List

### Navigation

Search for **User-Defined**:



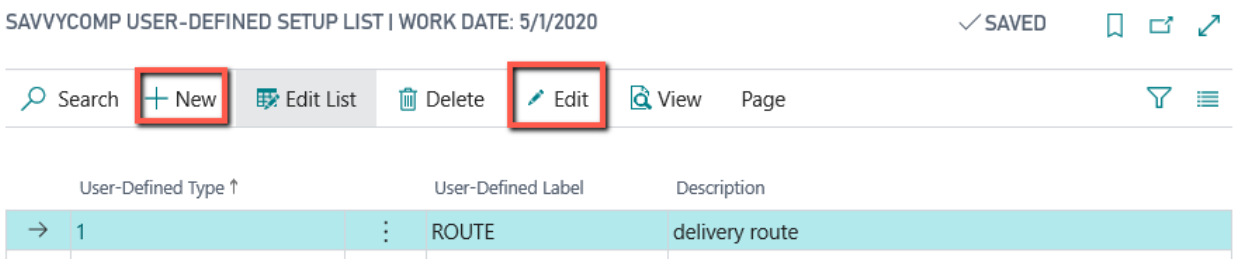

### List

Displays the User-Defined setups per User-Defined Type (currently, only User-Defined Type = 1 is supported, so you may only create one user-defined setup). If no setup exists, select **New** to create a setup, otherwise select Edit to modify an existing setup – both actions open page SavvyComp User-Defined Setup.

## SavvyComp User-Defined Setup

### Navigation

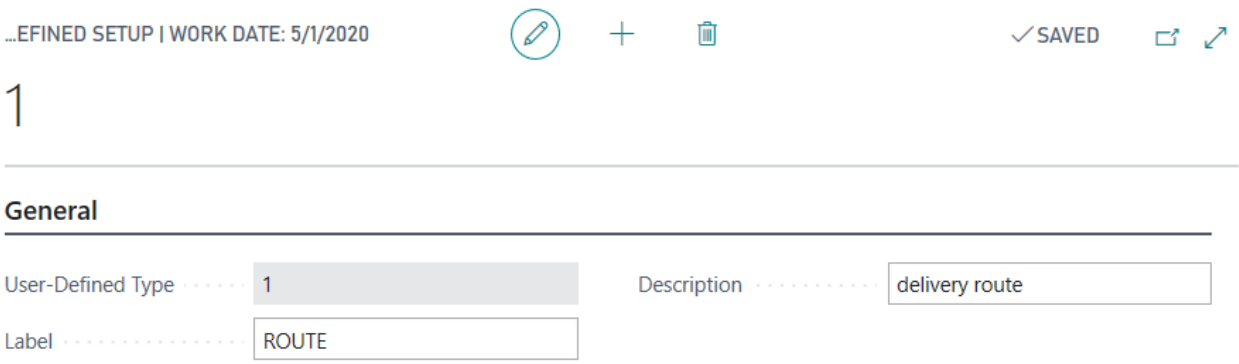
SavvyComp User-Defined Setup List > New / Edit:




### Overview

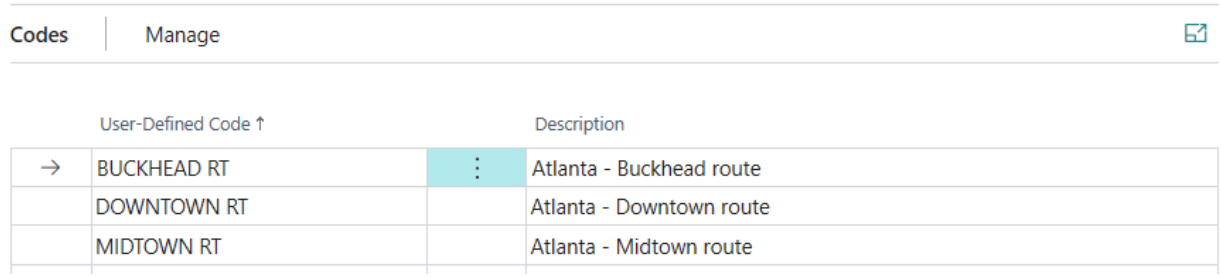
User-Defined is designed as an extra element in the matrix to help you automate compensation calculations for scenarios outside of Business Central's normal usage. In Designing the Compensation Matrix, our example included user-defined values to represent delivery routes. Customers serviced by a given route are assigned the corresponding user-defined value, and route drivers are also assigned to the corresponding user-defined value. A user-defined compensation group may be assigned to a user-defined value to simply the design of the matrix.

## General




Enter a **Label** and **Description**.

## Codes




Create the **User-Defined Codes** required for your compensation scenario. Continuing our example, we create the three delivery routes for Atlanta.

## Compensation Group Assignment

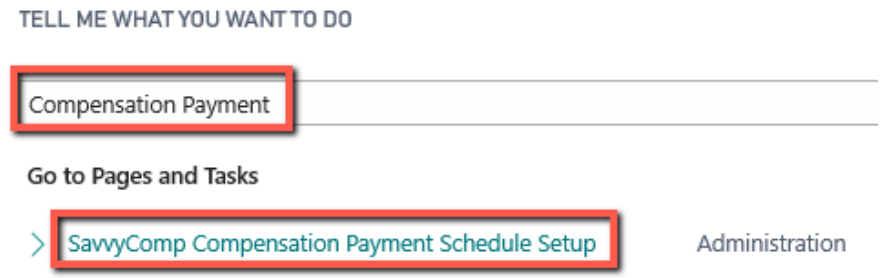
| Effective Date | User-Defined Code | User-Defined Compensation Group |
|---|---|---|
| 2/1/2020 | BUCKHEAD RT | BUCKHEAD |
| 2/1/2020 | DOWNTOWN RT | REGULAR |
| 2/1/2020 | MIDTOWN RT | REGULAR |

Depending on your compensation matrix setup, you may need to assign **a User-Defined Compensation Group** to a user-defined code. These assignments are set by **Effective Date**; when a salesperson compensation document is created, the compensation group for the latest effective date that falls on or before the sales document's Document Date will be used. Once an effective date is assigned to a sales compensation document, the group assignment may not be edited or deleted; however, you can enter a new assignment with a different effective date.

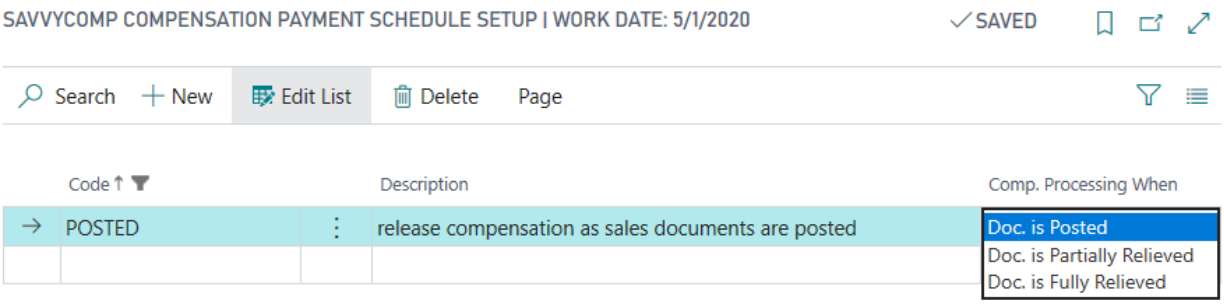
## SavvyComp Compensation Payment Schedule Setup

### Navigation

Search for **Compensation Payment:**




### Entry




In a future SavvyComp version, we'll add the ability to create and process payments for sales compensation documents. That functionality will allow you to determine, by salesperson, when compensation is released for processing (allowed to be paid out) for posted sales invoices (compensation released upon posting for posted sales credit memos). Compensation payments may be released when sales invoices are posted, when they're partially relieved (which will release a portion of the compensation payment), or when they're fully relieved.

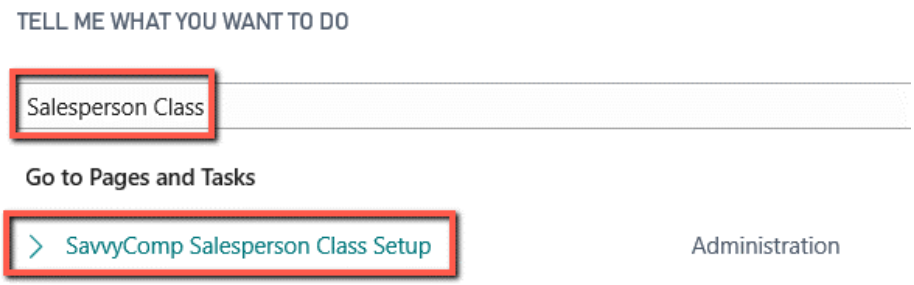
SavvyComp Salesperson Setup requires a payment schedule to be assigned to each salesperson, so you'll need to create at least one schedule. We recommend that you create schedules to cover all your payment scenarios and assign them now, so you'll be ready for the new version.

Once a schedule is assigned to a salesperson, it cannot be deleted.

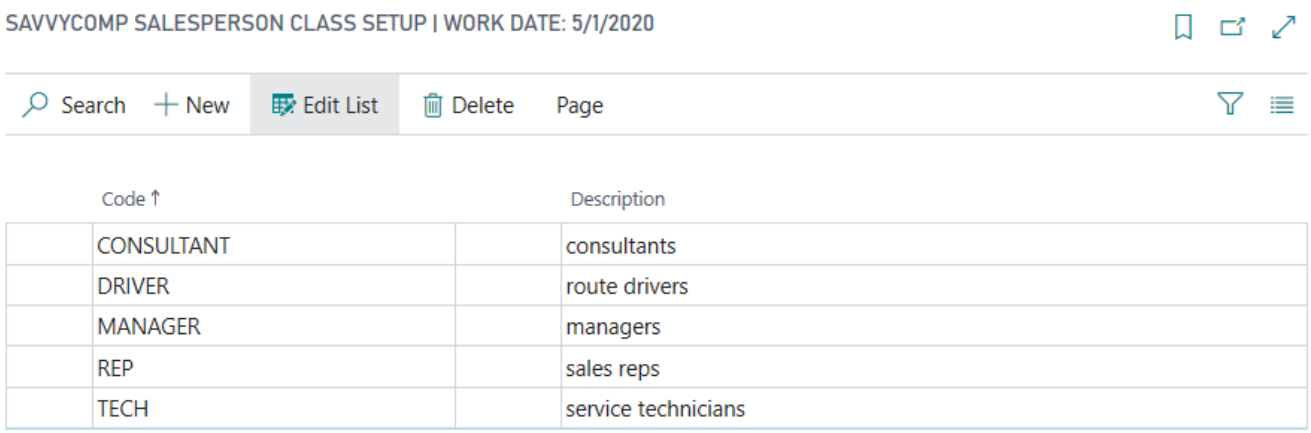
## SavvyComp Salesperson Class Setup

### Navigation

Search for **Salesperson Class:**




### Entry




| Code | Description |
|---|---|
| CONSULTANT | consultants |
| DRIVER | route drivers |
| MANAGER | managers |
| REP | sales reps |
| TECH | service technicians |

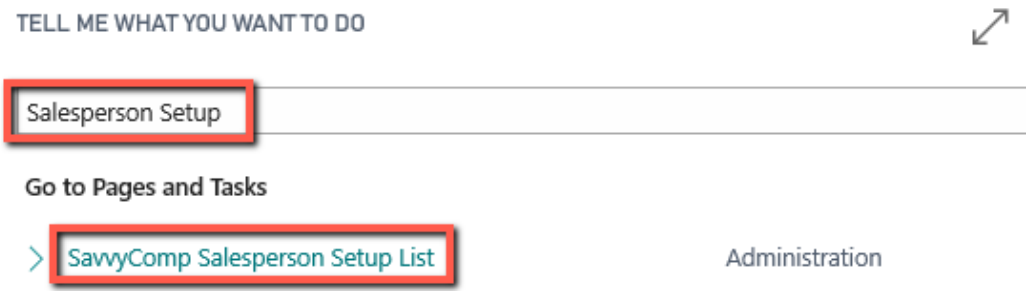
In a future SavvyComp version, we'll add the ability to create and process payments for sales compensation documents. You'll have several methods for filtering the payments, including Salesperson Class (each salesperson may be assigned to a class). I chose to create a salesperson class per salesperson compensation group.

Once a class is assigned to a salesperson, it cannot be deleted.

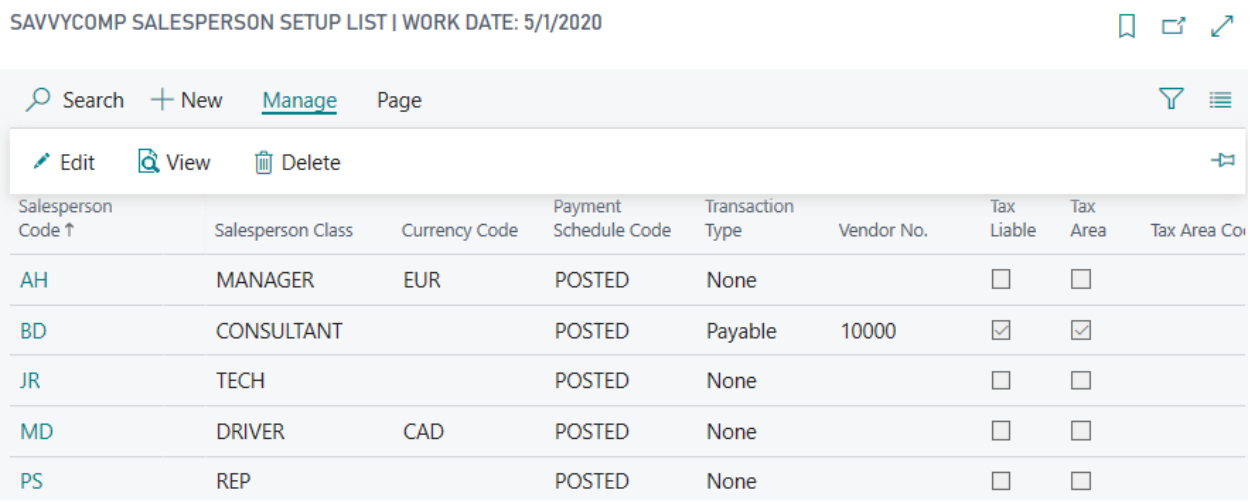
## SavvyComp Salesperson Setup List

### Navigation

Search for **Salesperson Setup:**




### List




| Salesperson Code | Salesperson Class | Currency Code | Payment Schedule Code | Transaction Type | Vendor No. | Tax Liable | Tax Area | Tax Area Co |
|---|---|---|---|---|---|---|---|---|
| AH | MANAGER | EUR | POSTED | None | | ☐ | ☐ | |
| BD | CONSULTANT | | POSTED | Payable | 10000 | ☑ | ☑ | |
| JR | TECH | | POSTED | None | | ☐ | ☐ | |
| MD | DRIVER | CAD | POSTED | None | | ☐ | ☐ | |
| PS | REP | | POSTED | None | | ☐ | ☐ | |

Each Business Central salesperson / purchaser with a SavvyComp setup is listed in the page.

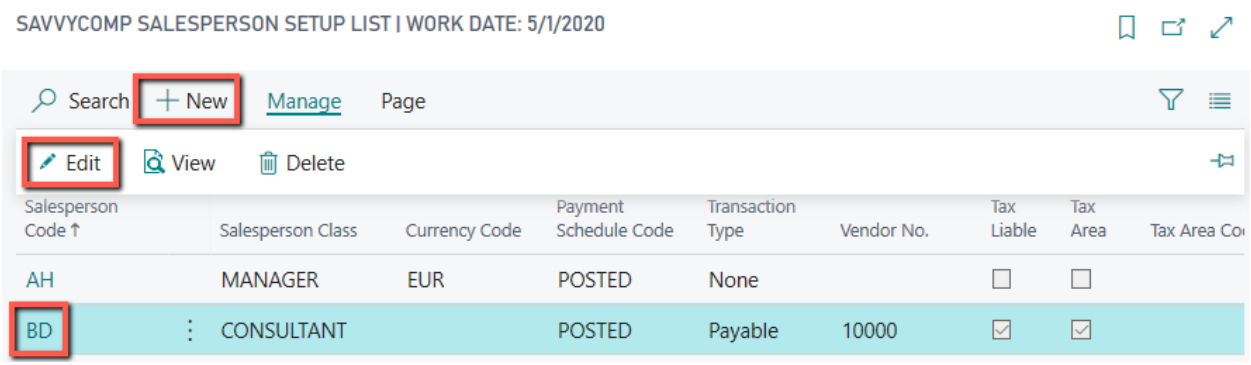
Select **New** to create a setup for a salesperson; select **Edit** to modify a salesperson's setup – both actions open page SavvyComp Salesperson Setup.

Once a salesperson compensation document is created for a salesperson, their setup cannot be deleted.

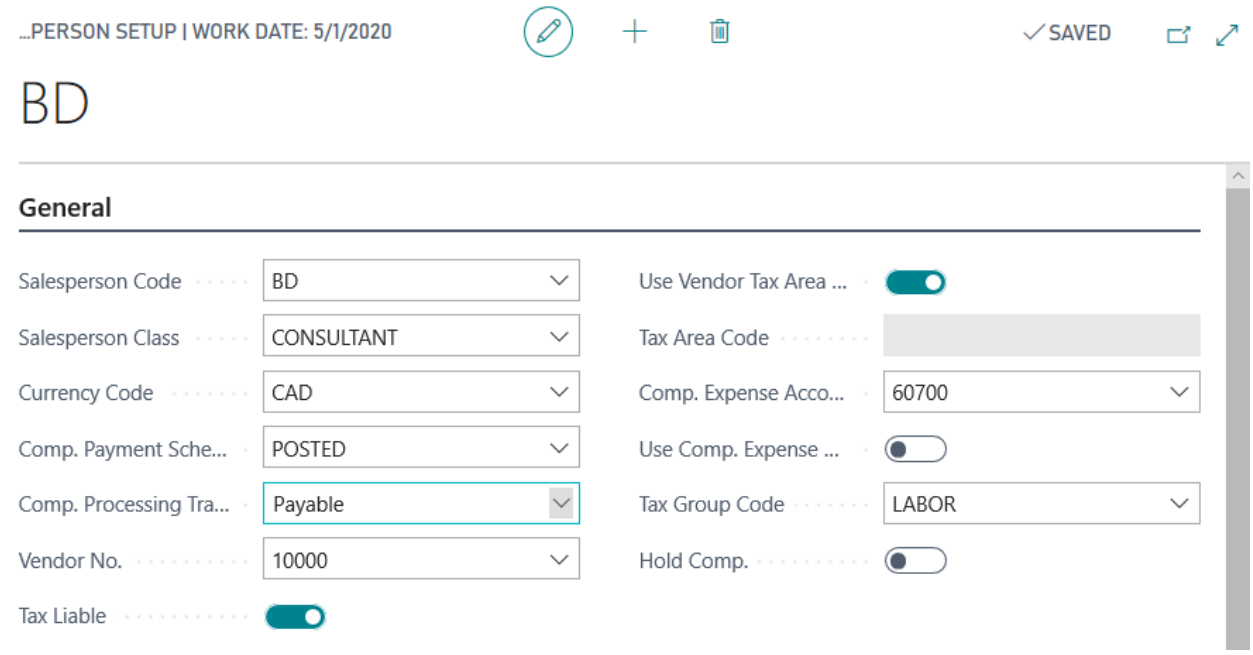
## SavvyComp Salesperson Setup

### Navigation

SavvyComp Salesperson Setup List > New / Edit / Salesperson Code:




### General




Enter a **Salesperson Class**, if applicable (see SavvyComp Salesperson Class Setup for details).

If the salesperson is compensated in other than your company's local currency, enter the appropriate **Currency Code**.

Enter a **Compensation Payment Schedule Code** (this field is required, see SavvyComp Compensation Payment Schedule Setup for details).

### *Compensation Processing*

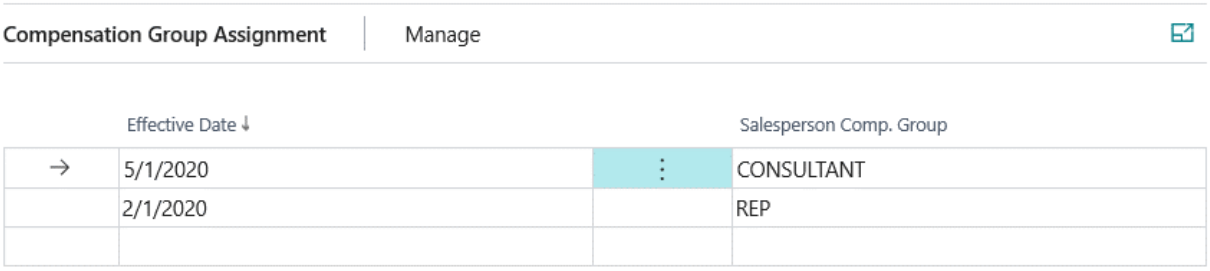
In a future SavvyComp version, we'll add the ability to create and process payments for sales compensation documents, along with the ability to create Business Central purchase documents when the compensation payments are processed. That functionality will use the following options:

- Compensation Processing Transaction Type
- Vendor No.
- Tax Liable
- Use Vendor Tax Area Code
- Compensation Expense Account
- Use Compensation Expense Account Tax Group Code
- Tax Group Code
- Hold Compensation

By default, **Compensation Processing Transaction Type** is set to None - If you set the option to Payable the following options are enabled / required:

1. You must enter a vendor.
2. If the purchase document should include taxes, set Tax Liable to True.
3. You can choose to use the vendor's tax area code, or you can specify a tax area code.
4. If you don't enter a Compensation Expense Account, the default account and tax group code options from SavvyComp Compensation Setup will be used; if you specify an Compensation Expense Account, you can choose to use the expense account's tax group code, or you can specify a tax group code.
5. If you set Hold Compensation to True, salesperson compensation documents created from this point forward will be placed on hold, and you'll be prompted to place existing unprocessed documents on hold. If you set Hold Compensation to False, holds for existing documents will be removed.

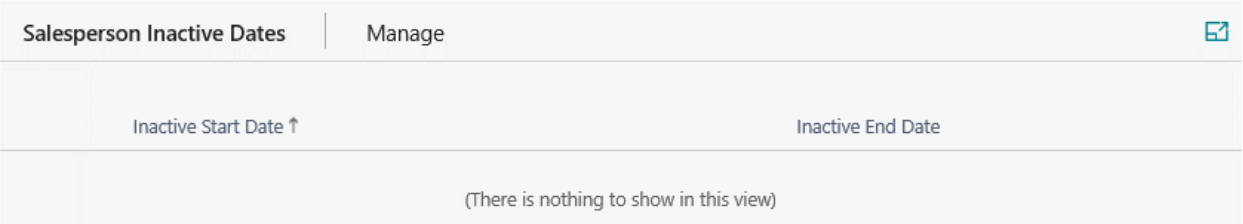
## Compensation Group Assignment




Depending on your compensation matrix setup, you may need to assign **a Salesperson Compensation Group** to a salesperson. These assignments are set by **Effective Date**; when a salesperson compensation document is created, the compensation group for the latest effective date that falls on or before the sales document's Document Date will be used. Once an effective date is assigned to a sales compensation document, the group assignment may not be edited or deleted; however, you can enter a new assignment with a different effective date.

In my example, the salesperson switched roles, from sales rep to consultant, which required a new group assignment.

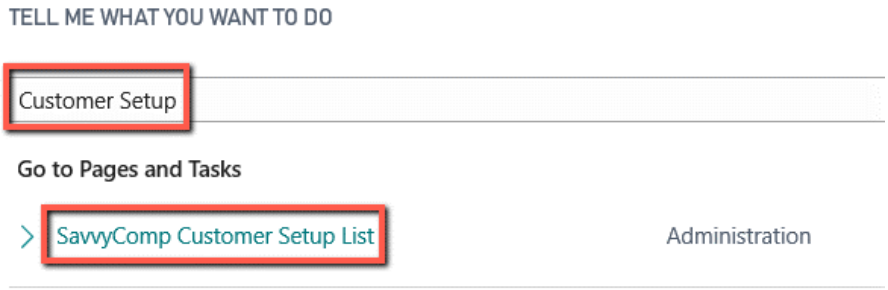
### Salesperson Inactive Dates



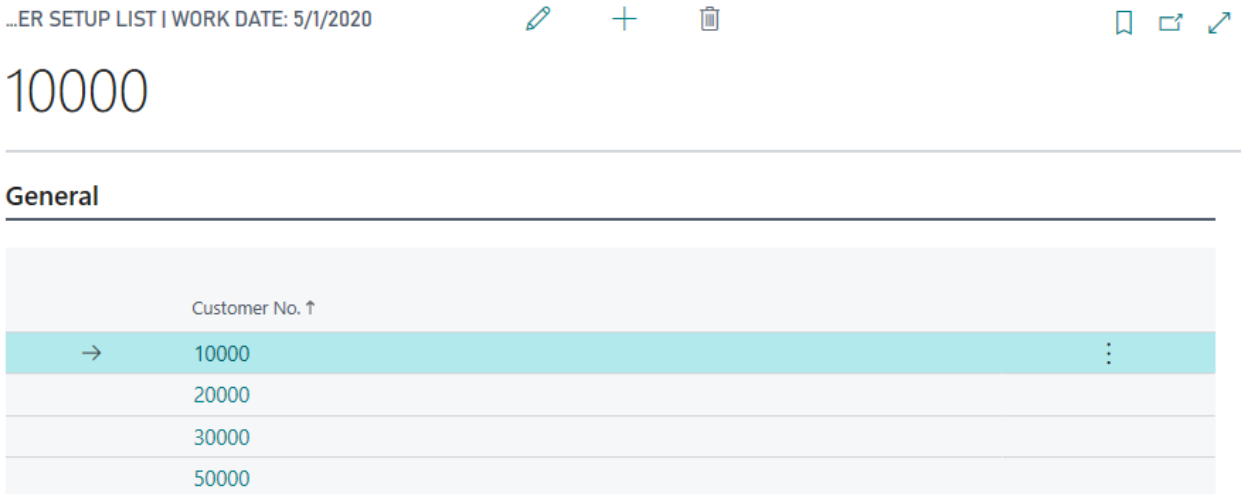

In a future version, you'll be able to enter Inactive date ranges for a salesperson. When creating salesperson compensation records for a sales document, a salesperson will be skipped if the sales document's Document Date falls within an Inactive range.

## SavvyComp Customer Setup List

### Navigation




### List

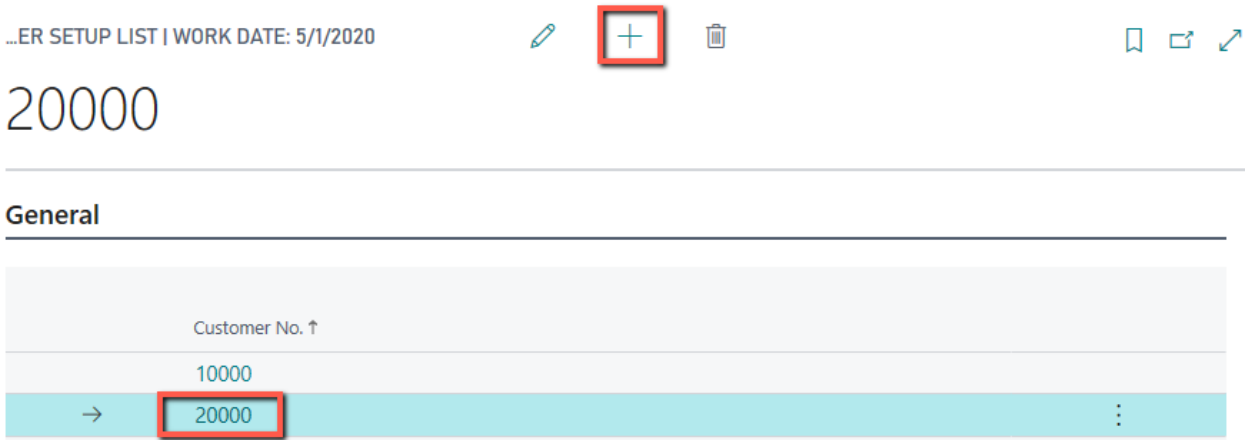



Each Business Central customer with a SavvyComp setup is listed in the page. Select **New (+)** to create a new setup; select a **Customer No.** to modify an existing setup – both actions open page SavvyComp Item Setup.

## SavvyComp Customer Setup

### Navigation

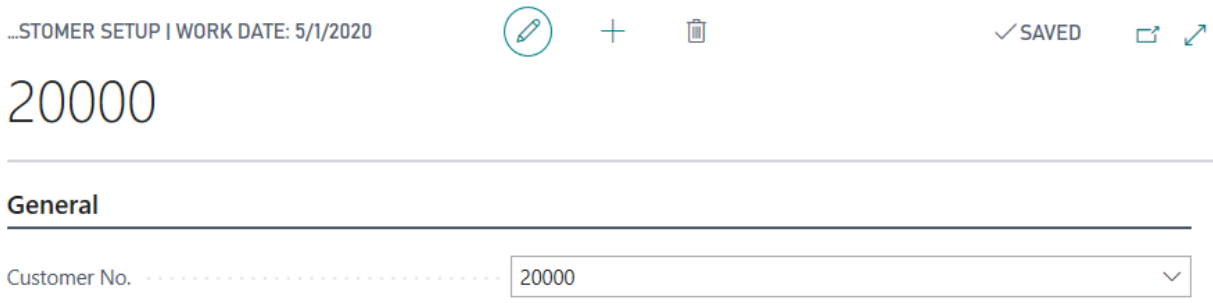
SavvyComp Customer Setup List > New (+) / Customer No.




### Overview

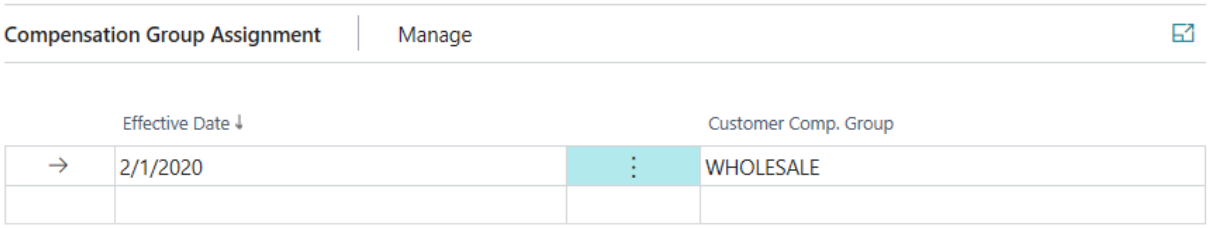
This page is used to assign a Customer Compensation Group to a customer or to assign a User-Defined Code to a customer. If your compensation scenario doesn't require these assignments, you can skip this part.

### General




If this is a new setup, enter **the Customer No.** If this is an existing setup, the number will be displayed.

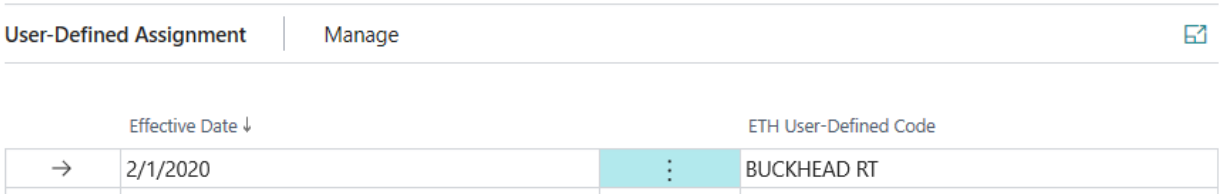
### Compensation Group Assignment




Depending on your compensation matrix setup, you may need to assign **a Customer Compensation Group** to a customer. These assignments are set by **Effective Date**; when a salesperson compensation document is created, the compensation group for the latest effective date that falls on or before the sales document's Document Date will be used. Once an effective date is assigned to a sales

compensation document, the group assignment may not be edited or deleted; however, you can enter a new assignment with a different effective date.

### User-Defined Assignment

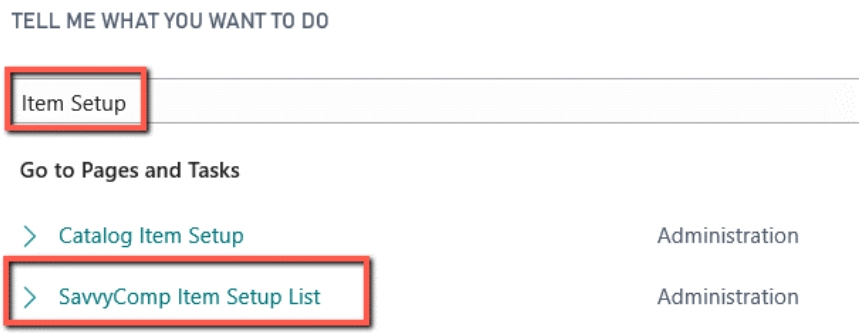



Depending on your compensation matrix setup, you may need to assign **a User-Defined Code** to a customer. These assignments are set by **Effective Date**; when a salesperson compensation document is created, the user-defined code for the latest effective date that falls on or before the sales document's Document Date will be used. Once an effective date is assigned to a sales compensation document, the user-defined code assignment may not be edited or deleted; however, you can enter a new assignment with a different effective date.

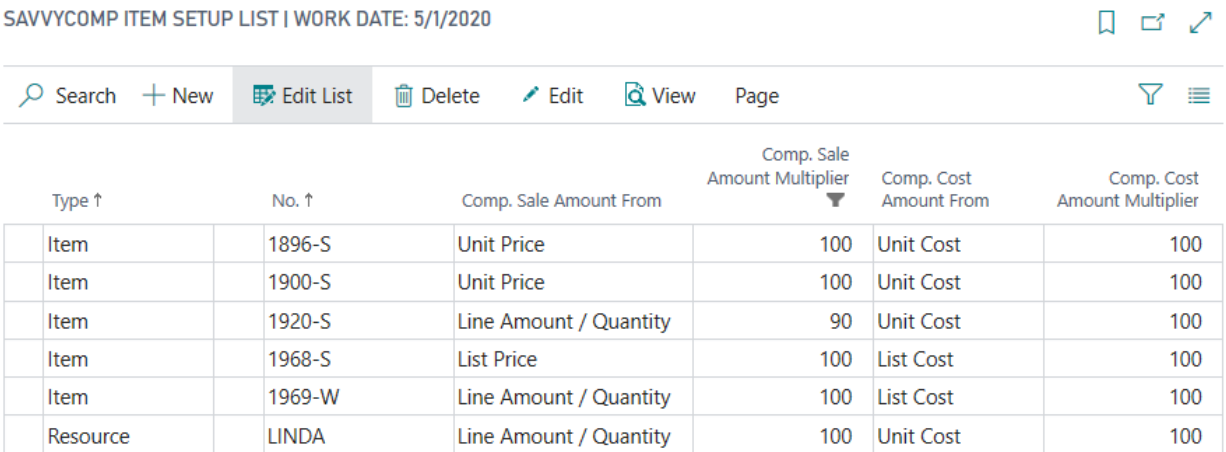
## SavvyComp Item Setup List

### Navigation

Search for Item Setup:




### List




| Type | No. | Comp. Sale Amount From | Comp. Sale Amount Multiplier | Comp. Cost Amount From | Comp. Cost Amount Multiplier |
|---|---|---|---|---|---|
| Item | 1896-S | Unit Price | 100 | Unit Cost | 100 |
| Item | 1900-S | Unit Price | 100 | Unit Cost | 100 |
| Item | 1920-S | Line Amount / Quantity | 90 | Unit Cost | 100 |
| Item | 1968-S | List Price | 100 | List Cost | 100 |
| Item | 1969-W | Line Amount / Quantity | 100 | List Cost | 100 |
| Resource | LINDA | Line Amount / Quantity | 100 | Unit Cost | 100 |

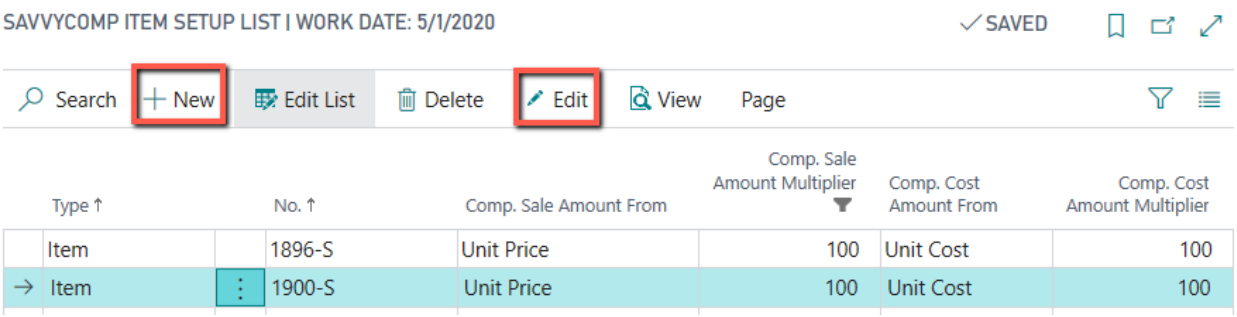
Each Business Central Item Type / No. with a SavvyComp setup is listed in the page. This includes G/L Accounts, Items, Resources, Fixed Assets, and Charge Items.

Select **New** to create a new setup; select **Edit** to modify an existing setup – both actions open page SavvyComp Item Setup.

## SavvyComp Item Setup

### Navigation

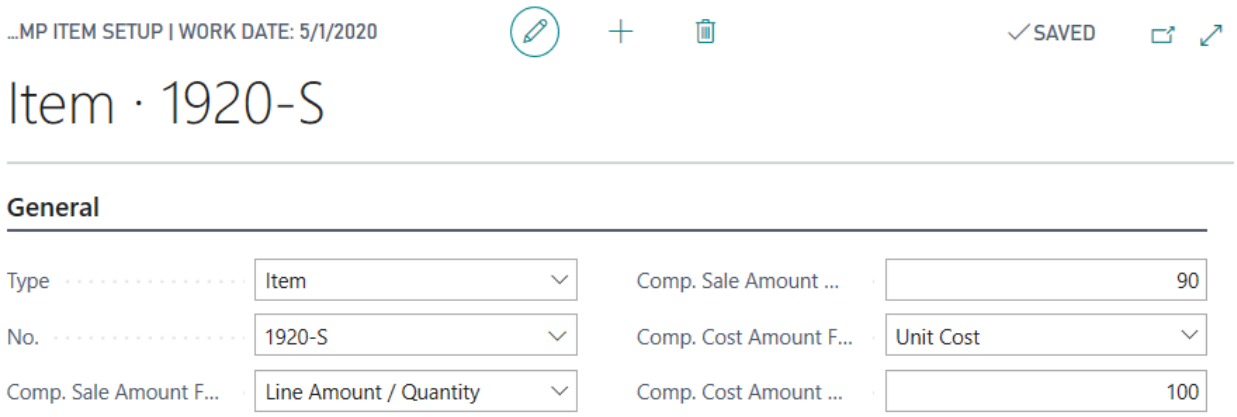
SavvyComp Item Setup List > New / Edit:




### Overview

This page is used to assign Compensation Sale Amount From, Compensation Sale Amount Multiplier, Compensation Cost From, Compensation Cost Multiplier, and an Item Compensation Group to an Item Type / No. If your compensation scenario doesn't require these assignments, you can skip this part.

### General




Select the appropriate **Compensation Sale Amount From**. For all types, options include:

- Unit Price
- Line Amount / Quantity

For Item and Resource types, an additional option - **List Price** – is available. For items, List Price is the Unit Price displayed in the Price & Sales section of page Item Card; for Resources, List Price is the Unit Price displayed in the Invoicing section of page Resource Card.

Enter the **Compensation Sale Amount Multiplier**. Typically, you'll set the multiplier to 100; use a different value if you want to adjust the Compensation Line Amount by a fixed percentage.

Example: let's say you have an item whose price of $100.00 includes embedded freight of 12%, and you've set the Compensation Amount From = Line Amount / Quantity to ensure that your compensation documents reflect any line discounts. You've set the Compensation Sale Amount Multiplier to 88% to account for embedded freight. If a sales document line's Unit Price = 100.00, Quantity = 3, and Line Discount % = 10%, the Line Amount Excluding Taxes = (100 * 3) – (100 * 3 * .10) = 300 – 30 = 270. The Compensation Unit Sale Amount = 270/3 = 90, and the Compensation Line Sale Amount = (90 * 3) * .88 = 237.60.

Select the appropriate **Compensation Cost Amount From**. For all types, options include:

- Unit Cost
- Unit Price
- Line Amount / Quantity

For Item and Resource types, two additional options are available:

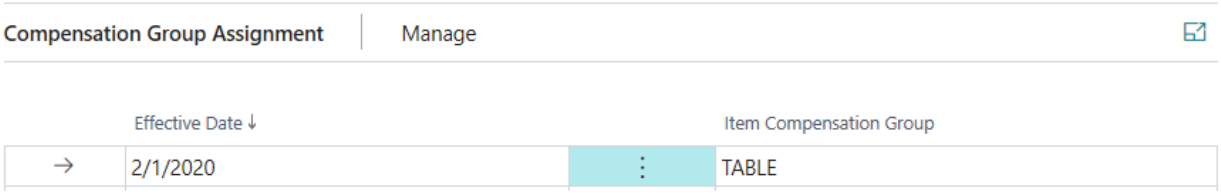
- **List Cost:** For items with Costing Method = Standard, List Cost is the Standard Cost displayed in the Costs & Posting section of the Item Card; for items with any other Costing Method, List Cost is the Unit Cost displayed in the Costs & Posting section of the Item Card. For Resources, List Cost is the Unit Cost displayed in the Invoicing section of page Resource Card.
- **List Price** (see the List Price descriptor for Compensation Sale Amount From)

The sales options (Unit Price, Line Amount / Quantity, and List Price) are available for Compensation Cost Amount calculations so that you can have compensation based on a margin calculation for items that don't have a cost amount on a sales document line.

Enter the **Compensation Cost Amount Multiplier**. Typically, you'll set the multiplier to 100; use a different value if you want to adjust the Compensation Cost Amount by a fixed percentage.

Example: let's say you have a service item which doesn't have a cost structure in Business Central, and you've set the Compensation Sale Amount From = Line Amount / Quantity and the Compensation Sale Amount Multiplier = 100, and you know that your cost is 60% of the item's List Price. You can set the Compensation Cost Amount From = List Price and the Compensation Cost Amount Multiplier = 60. Let's say the item's List Price = 85.00. Regardless of the information that appears on a document line for this item, the Compensation Unit Cost Amount = 85. If the document line's Quantity = 3, the Compensation Line Cost Amount = (85 * 3) * .60 = 153.

## Compensation Group Assignment

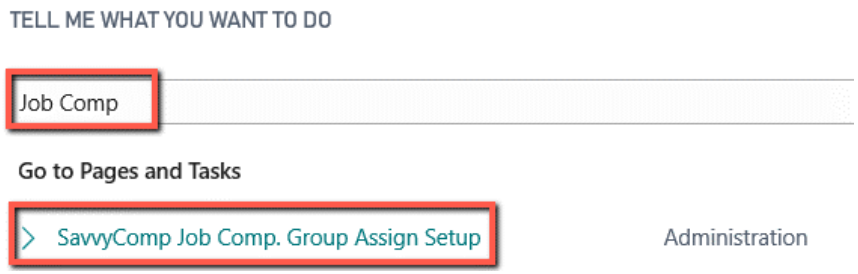


Depending on your compensation matrix setup, you may need to assign **an Item Compensation Group** to a Type / No. These assignments are set by **Effective Date**; when a salesperson compensation document is created, the compensation group for the latest effective date that falls on or before the sales document's Document Date will be used. Once an effective date is assigned to a sales compensation document, the group assignment may not be edited or deleted; however, you can enter a new assignment with a different effective date.

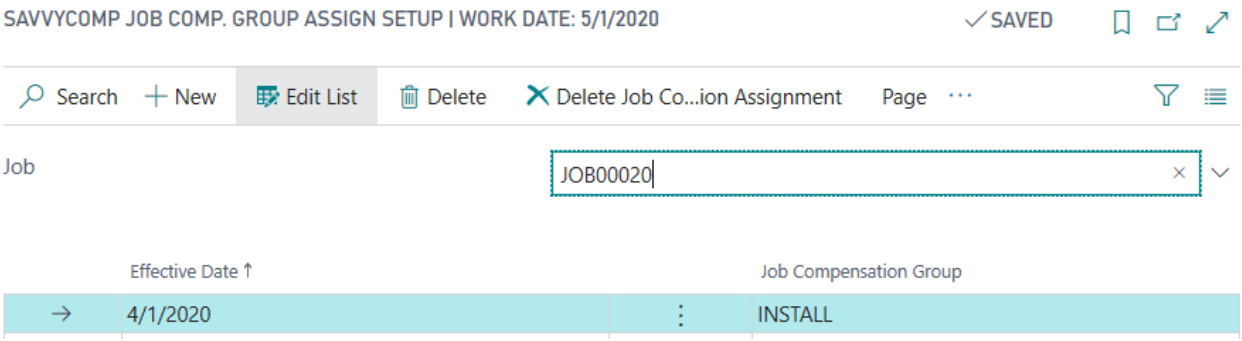
## SavvyComp Job Comp. Group Assign Setup

### Navigation

Search for **Job Comp**:




### Entry

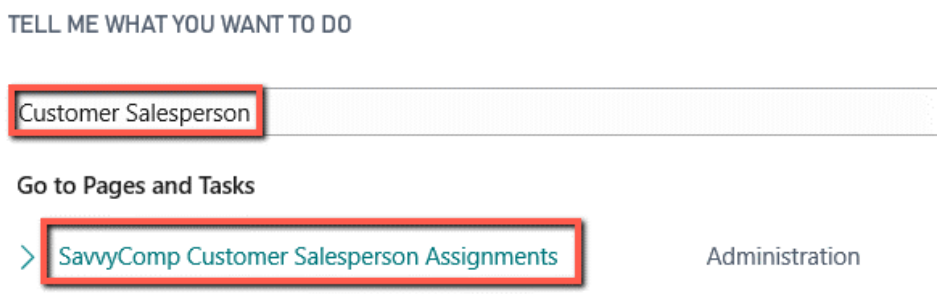



Depending on your compensation matrix setup, you may need to assign **a Job Compensation Group** to a job. These assignments are set by **Effective Date**; when a salesperson compensation document is created, the compensation group for the latest effective date that falls on or before the sales document's Document Date will be used. Once an effective date is assigned to a sales compensation document, the group assignment may not be edited or deleted; however, you can enter a new assignment with a different effective date.

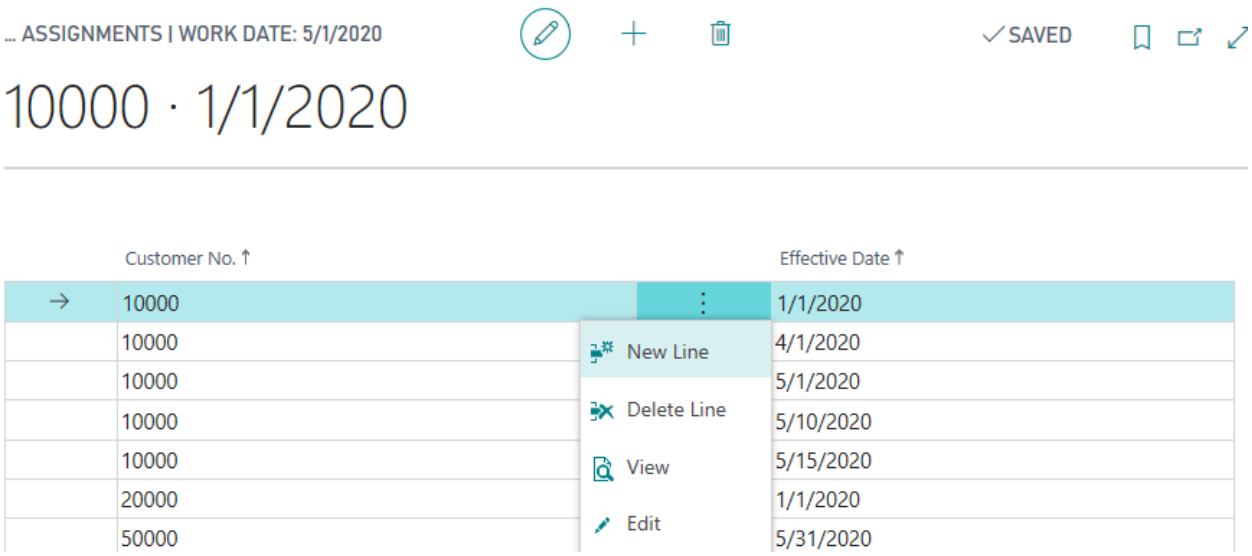
## SavvyComp Customer Salesperson Assignments

### Navigation

Search for **Customer Salesperson**:




### List



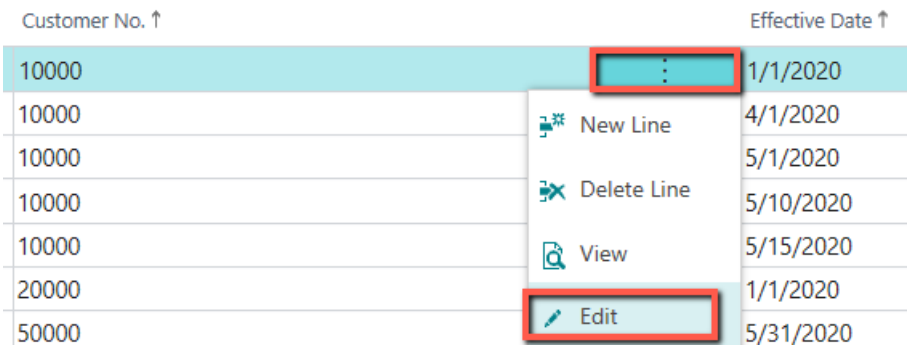

Each Business Central customer with a SavvyComp salesperson assignment setup is listed in the page, per effective date.

To create a new setup, enter the **Customer No.** and **Effective Date**. To modify a setup, select **Edit** from the line options to open page SavvyComp Customer Salesperson Assignment.

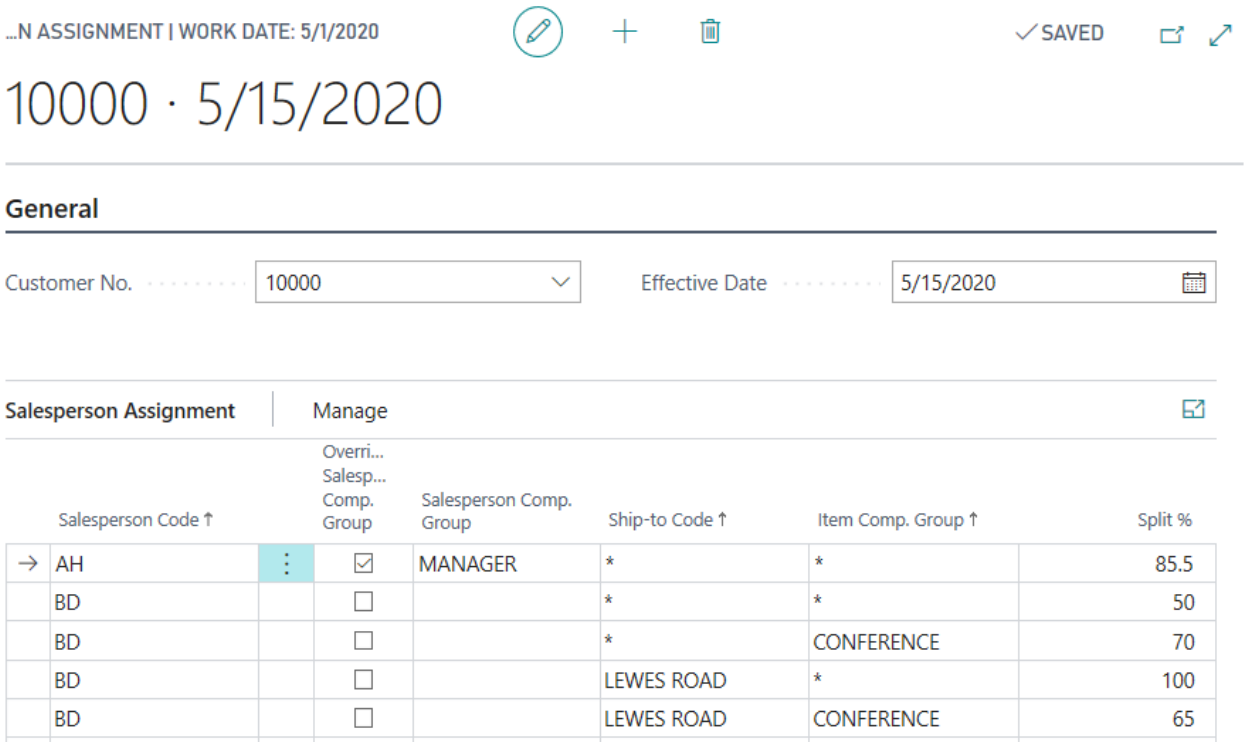
## SavvyComp Customer Salesperson Assignment

### Navigation

SavvyComp Customer Salesperson Assignments > Line options > Edit.




Entry




Enter the salesperson(s) who should receive compensation for sales to the customer. If you mark the **Override Salesperson Compensation Group** checkbox, you can specify the Salesperson Compensation Group for the setup; otherwise, SavvyComp will determine the salesperson compensation group for a compensation document line using the salesperson's setup.

You can enter the same salesperson multiple times, with different Ship-to Code and Item Compensation Group options. When a compensation document line is created, the setup that best matches the compensation document line's information is used.

In this example, salesperson BD's Split % for a salesperson compensation line will be set as follows:

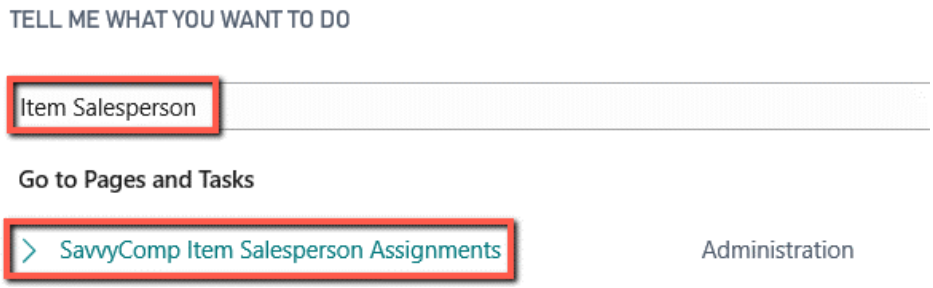
1. 65% if the compensation line's Ship-to Code = LEWES ROAD and Item Compensation Group = CONFERENCE

2. 100% if the compensation line's Ship-to Code = LEWES ROAD and Item Compensation Group <> CONFERENCE
3. 70% if the compensation line's Ship-to Code <> LEWES ROAD and Item Compensation Group = CONFERENCE
4. 50% if the compensation line's Ship-to Code <> LEWES ROAD and Item Compensation Group <> CONFERENCE

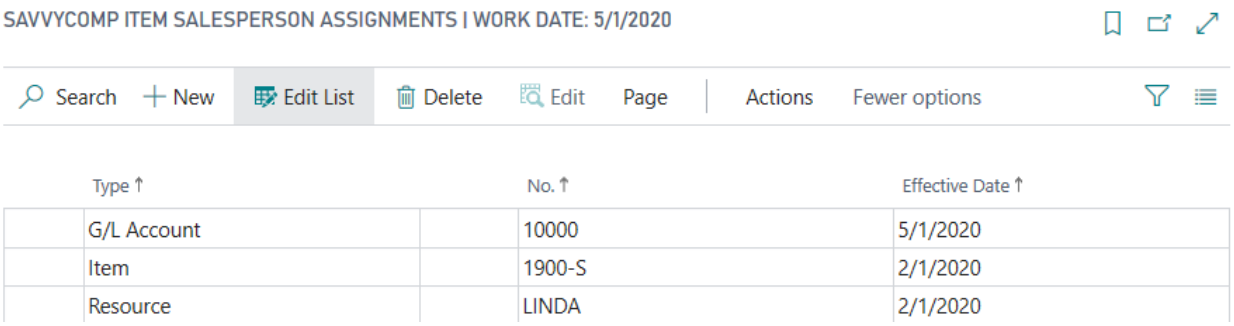
## SavvyComp Item Salesperson Assignments

### Navigation

Search for **Item Salesperson**:




### List



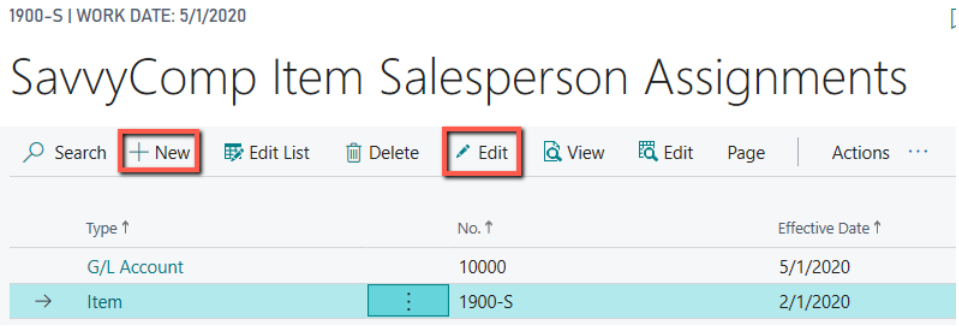

Each Business Central Type / No. that can be used as a sales document item and that has a SavvyComp salesperson assignment setup is listed in the page, per effective date.

Select **New** to create a new setup or select **Edit** to modify an existing setup - both to open page SavvyComp Item Salesperson Assignment.

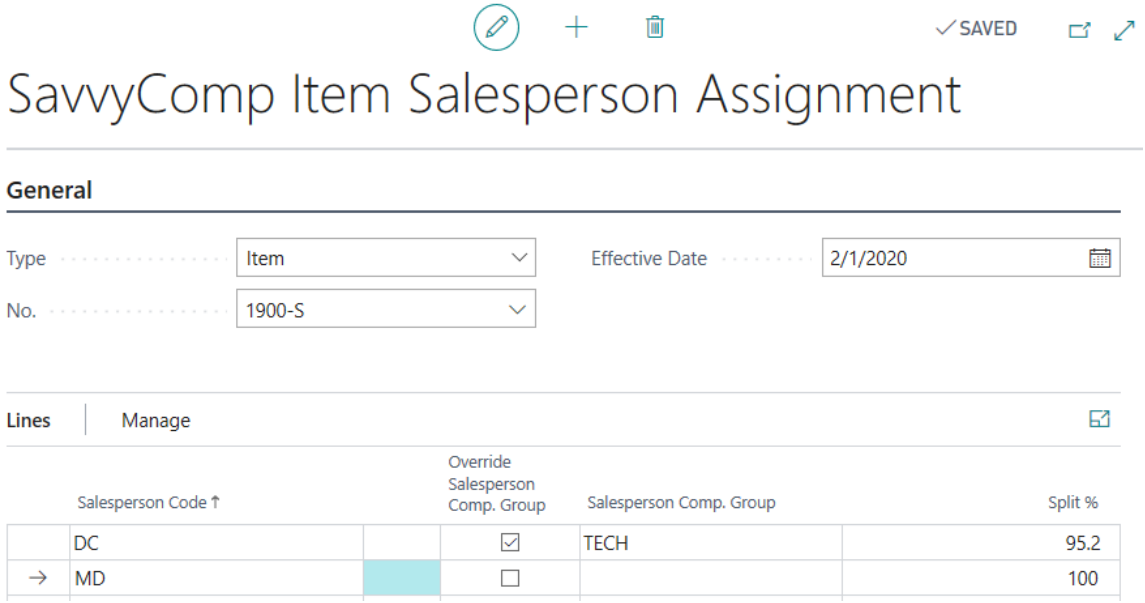
## SavvyComp Item Salesperson Assignment

### Navigation

SavvyComp Item Salesperson Assignments > New / Edit:




### Entry

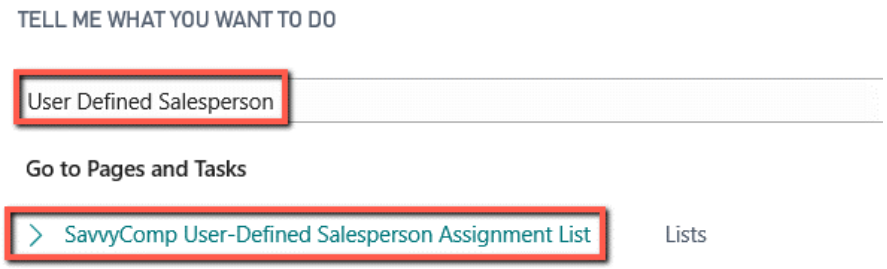



Enter the salesperson(s) who should receive compensation when the item appears on a compensation document line. If you mark the **Override Salesperson Compensation Group** checkbox, you can specify the Salesperson Compensation Group for the setup; otherwise, SavvyComp will determine the salesperson compensation group for a compensation document line using the salesperson's setup.

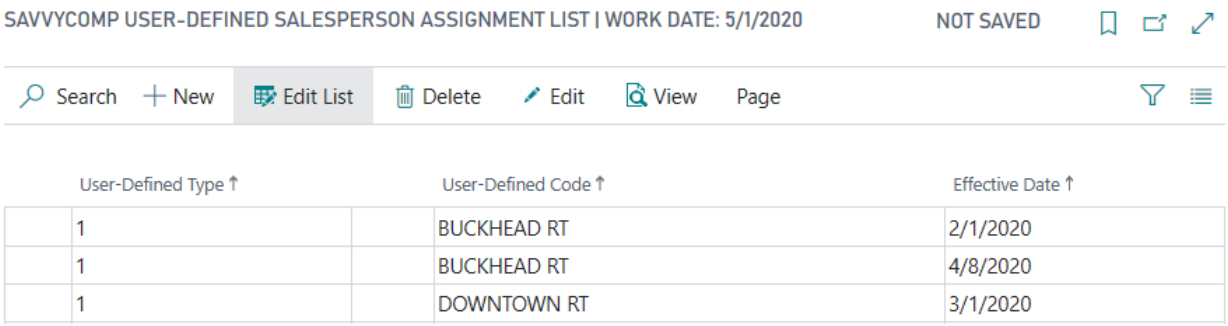
## SavvyComp User-Defined Salesperson Assignments

### Navigation

Search for **User Defined Salesperson**:




### List




| User-Defined Type | User-Defined Code | Effective Date |
|---|---|---|
| 1 | BUCKHEAD RT | 2/1/2020 |
| 1 | BUCKHEAD RT | 4/8/2020 |
| 1 | DOWNTOWN RT | 3/1/2020 |

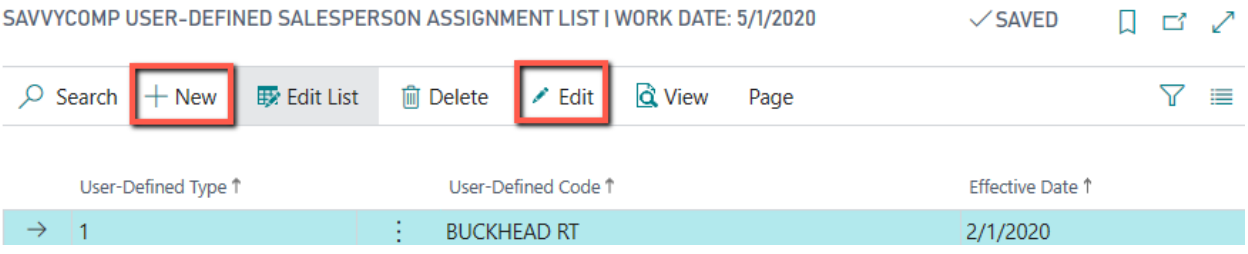
Each SavvyComp user-defined code with a SavvyComp salesperson assignment setup is listed in the page, per effective date.

Select **New** to create a new setup; select **Edit** to modify an existing setup – both actions open page SavvyComp User-Defined Salesperson Assignment.

## SavvyComp User-Defined Salesperson Assignment

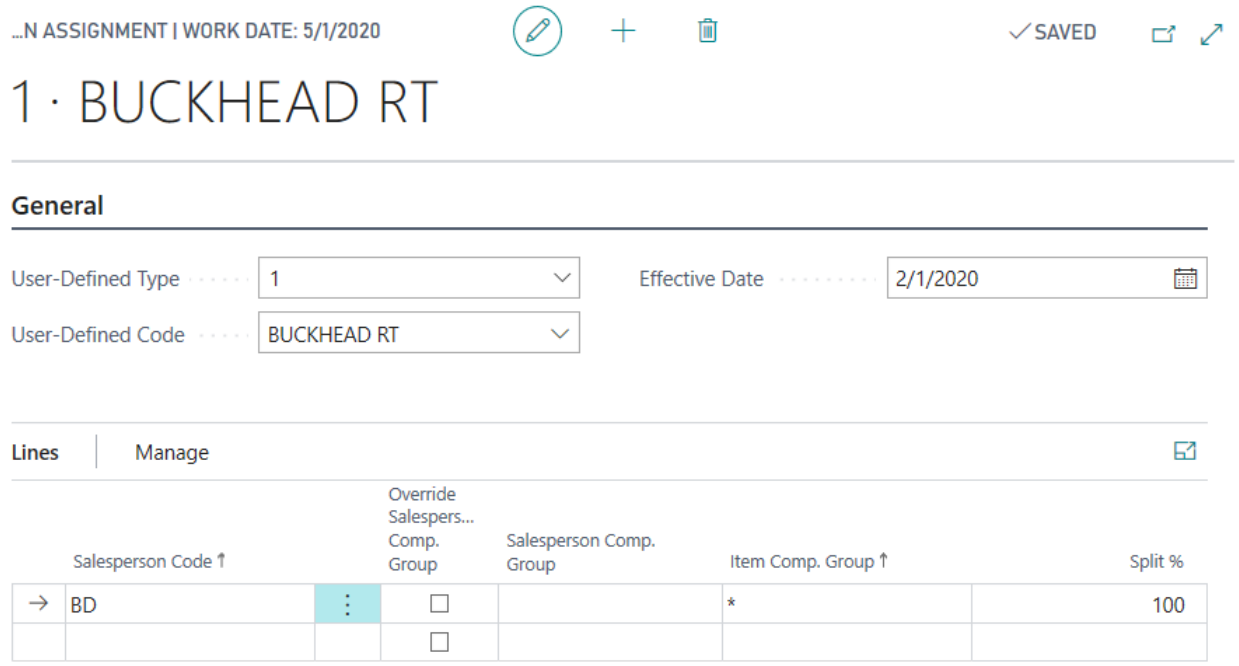
### Navigation

SavvyComp User-Defined Salesperson Assignments > New / Edit:




| User-Defined Type | User-Defined Code | Effective Date |
|---|---|---|
| 1 | BUCKHEAD RT | 2/1/2020 |

### Entry

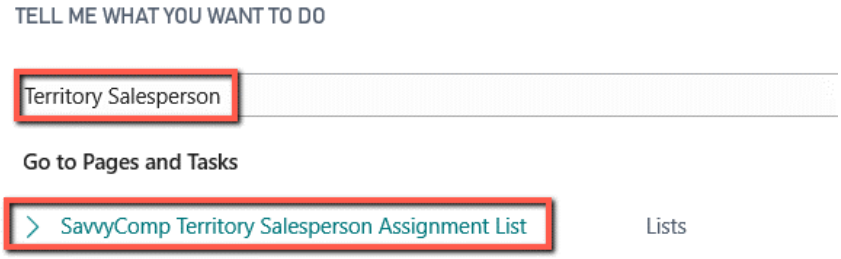



Enter the salesperson(s) who should receive compensation when the user-defined code appears on a compensation document line. If you mark the **Override Salesperson Compensation Group** checkbox, you can specify the Salesperson Compensation Group for the setup; otherwise, SavvyComp will determine the salesperson compensation group for a compensation document line using the salesperson's setup.

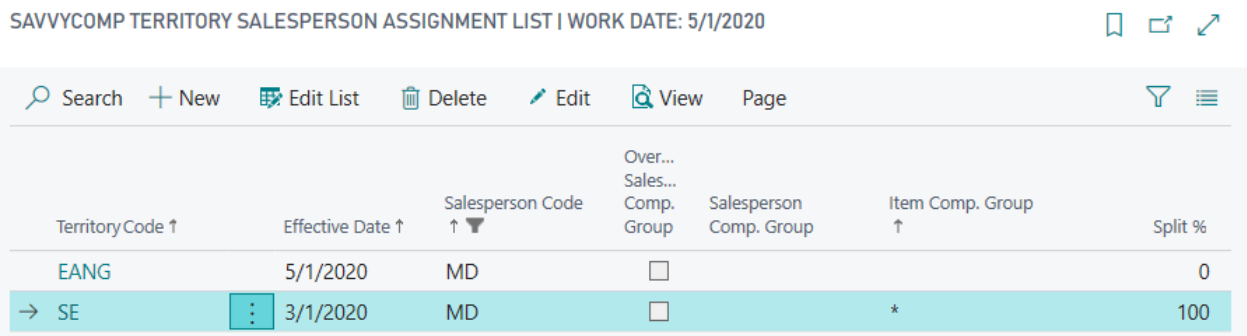
You can enter the same salesperson multiple times, with different Item Compensation Group options. When a compensation document line is created, the setup that best matches the compensation document line's information is used.

## SavvyComp Territory Salesperson Assignments

### Navigation



### List



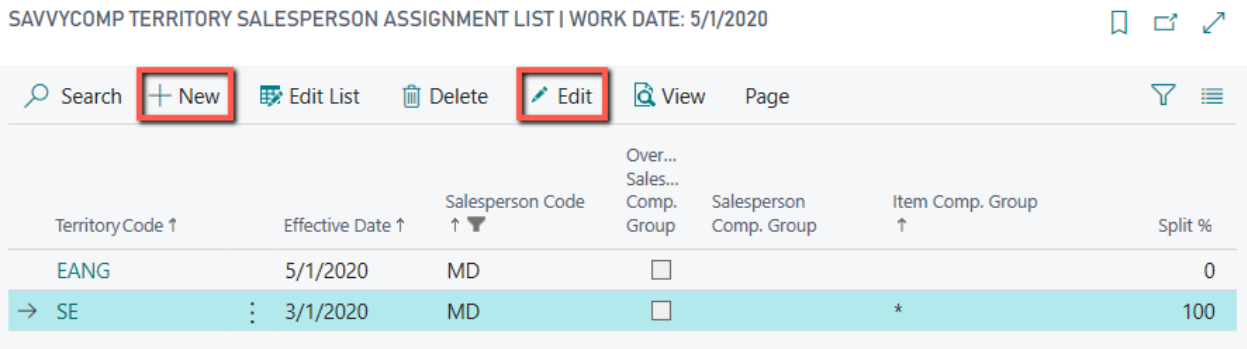

Each Business Central territory with a SavvyComp salesperson assignment setup is listed in the page, per effective date.

Select **New** to create a new setup; select **Edit** to modify an existing setup – both actions open page SavvyComp Territory Salesperson Assignment.

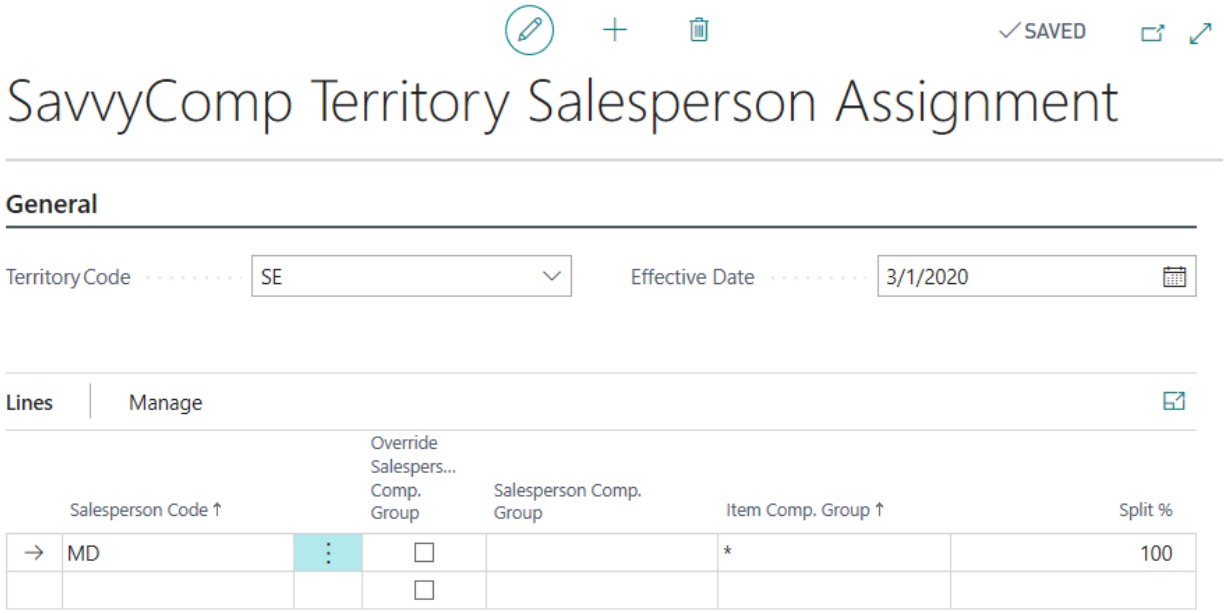
## SavvyComp Territory Salesperson Assignment

### Navigation

SavvyComp Territory Salesperson Assignments > New / Edit:



Entry




Enter the salesperson(s) who should receive compensation when the territory appears on a compensation document line. If you mark the **Override Salesperson Compensation Group** checkbox, you can specify the Salesperson Compensation Group for the setup; otherwise, SavvyComp will determine the salesperson compensation group for a compensation document line using the salesperson's setup.

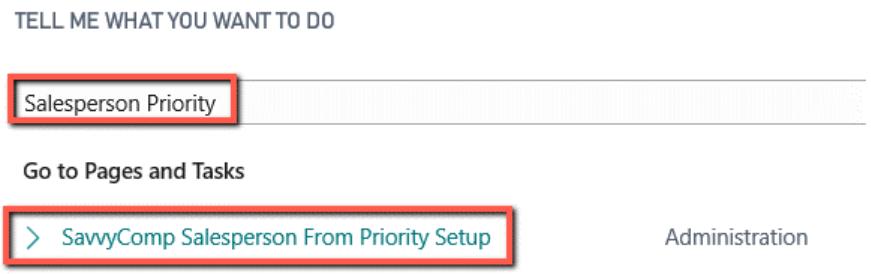
You can enter the same salesperson multiple times, with different Item Compensation Group options. When a compensation document line is created, the setup that best matches the compensation document line's information is used.

## SavvyComp Salesperson From Priority Setup

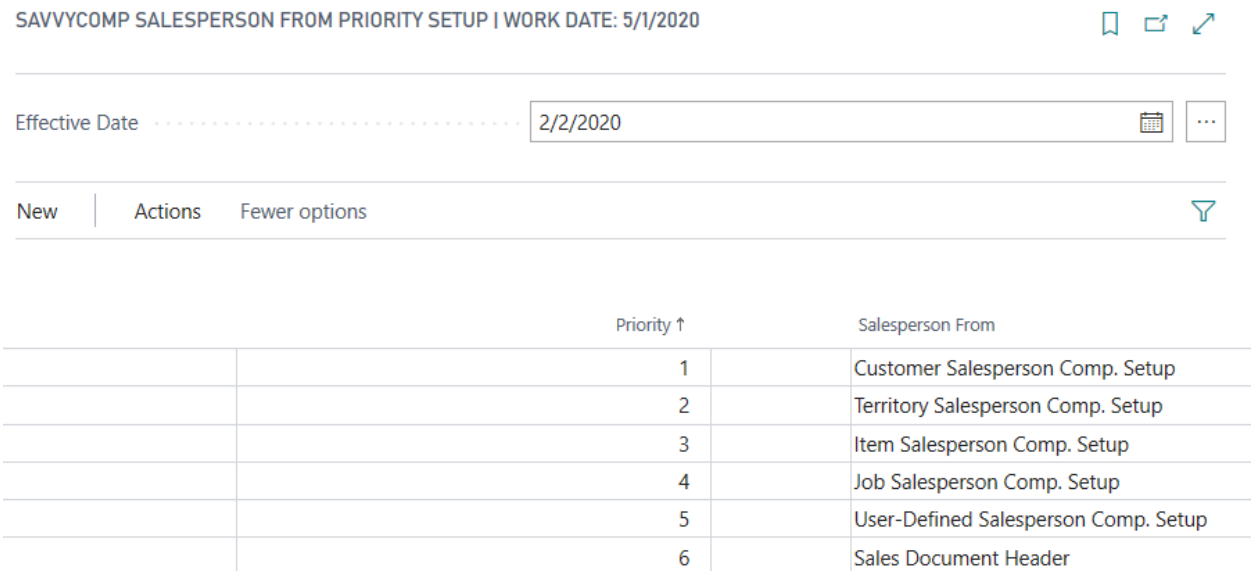
### Navigation

SavvyComp Compensation Matrix Setup > Navigate > Salesperson From Priority Setup

Search for **Salesperson Priority**:



## Entry




When the page opens, the setup for the latest Effective Date is displayed. If no setup is displayed, generate the initial salesperson from priority setup.

### *Priority Usage*

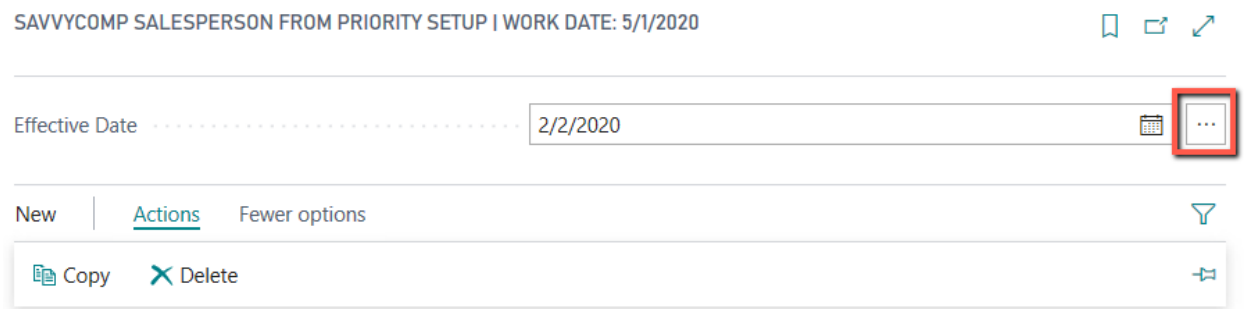
If a salesperson is assigned to multiple SavvyComp …Salesperson From entities and / or the sales document AND SavvyComp is set up to compensation a salesperson once per sales document line, we need a method to determine which setup should govern the compensation line calculations when multiple setups apply to a document line.

The Salesperson From Priority setup allows you to dictate the order in which the applicable setups are evaluated. For example, salesperson code = AH could be assigned to customer = 1000 via the SavvyComp Customer Salesperson Assignment page and to territory = NE via the Territory Salesperson Assignment page and directly to a sales document. If this territory is assigned to a line on a sales document for this customer, Annett's compensation calculations will be driven by the Customer Salesperson Assignment, since that setup has the highest priority (lowest Priority value).

### *Priority Reorder*

You cannot add or remove priority lines, but in a future SavvyComp build you will be able to change the priority of a line. For a preview, see how it works for matrix priority.

## Actions



### *Copy*

When your compensation structure changes, you may need to modify your Salesperson From priority settings. Use the Copy functionality to copy an existing priority setup to a new effective date, then use the Date Lookup button to display the setup for the new effective date. Edit the setup according to your new compensation structure.

Note: since you can't change the priority of a line, there is no need to copy the setup at this time.

### *Delete*

You can delete a Salesperson From priority setup unless either of the following conditions is true:

1. The setup's Effective Date is in use.
2. The setup's Effective Date matches the Earliest Document Date in page SavvyComp Compensation Setup.

# Compensation Documents

## Overview

SavvyComp allows you to calculate salesperson compensation for posted sales invoices and posted sales credit memos. In a future SavvyComp version, you'll be able to create compensation for unposted sales documents and for compensation adjustment documents.

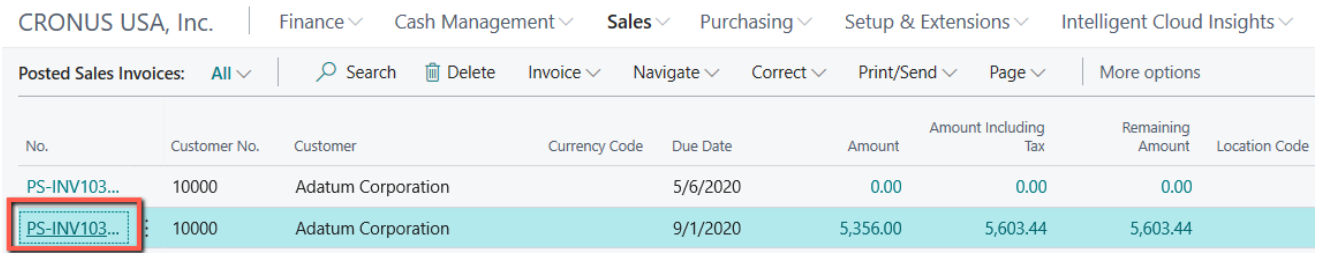
Before calculating salesperson compensation for a sales document, SavvyComp creates a compensation sales document for the Business Central sales document. You can edit compensation document values that affect the calculation of salesperson compensation without affecting the sales document. For example, you could change the salesperson, enter a territory, or modify the job for a document line.

Once you've edited the compensation document, you create (or recreate) salesperson compensation for the document.

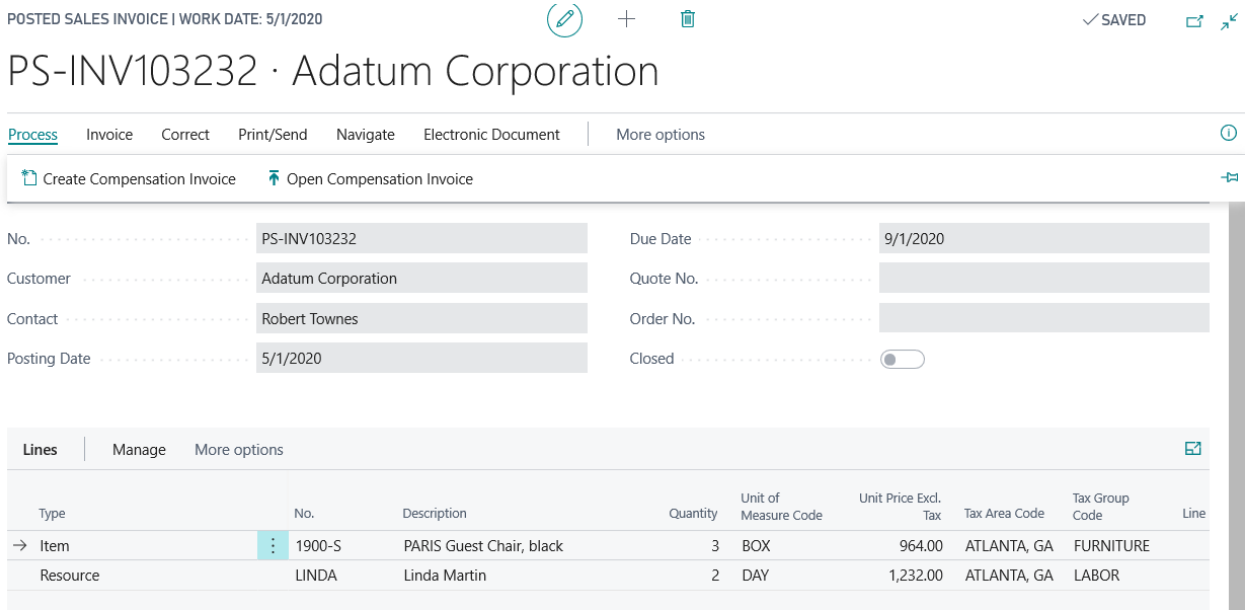
## Posted Sales Invoice

### Navigation

Posted Sales Invoices > No:



## Process




### *Create Compensation Invoice*

Creates a compensation sales invoice for the posted sales invoice.

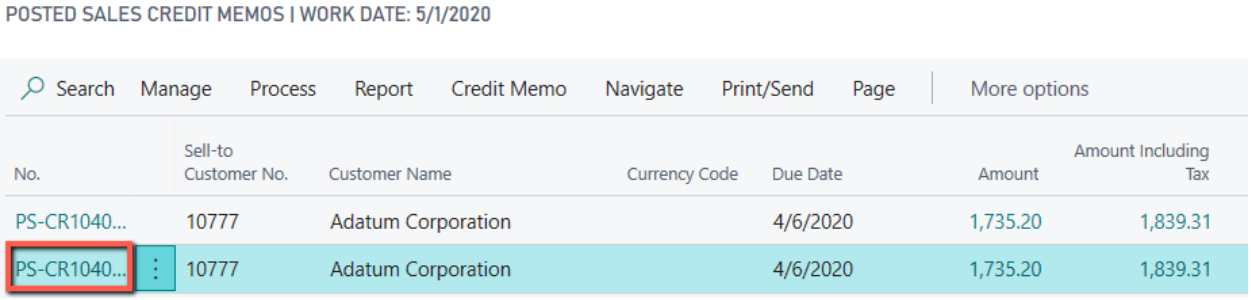
### *Open Compensation Invoice*

Opens an existing compensation sales invoice in page SavvyComp Sales Document.

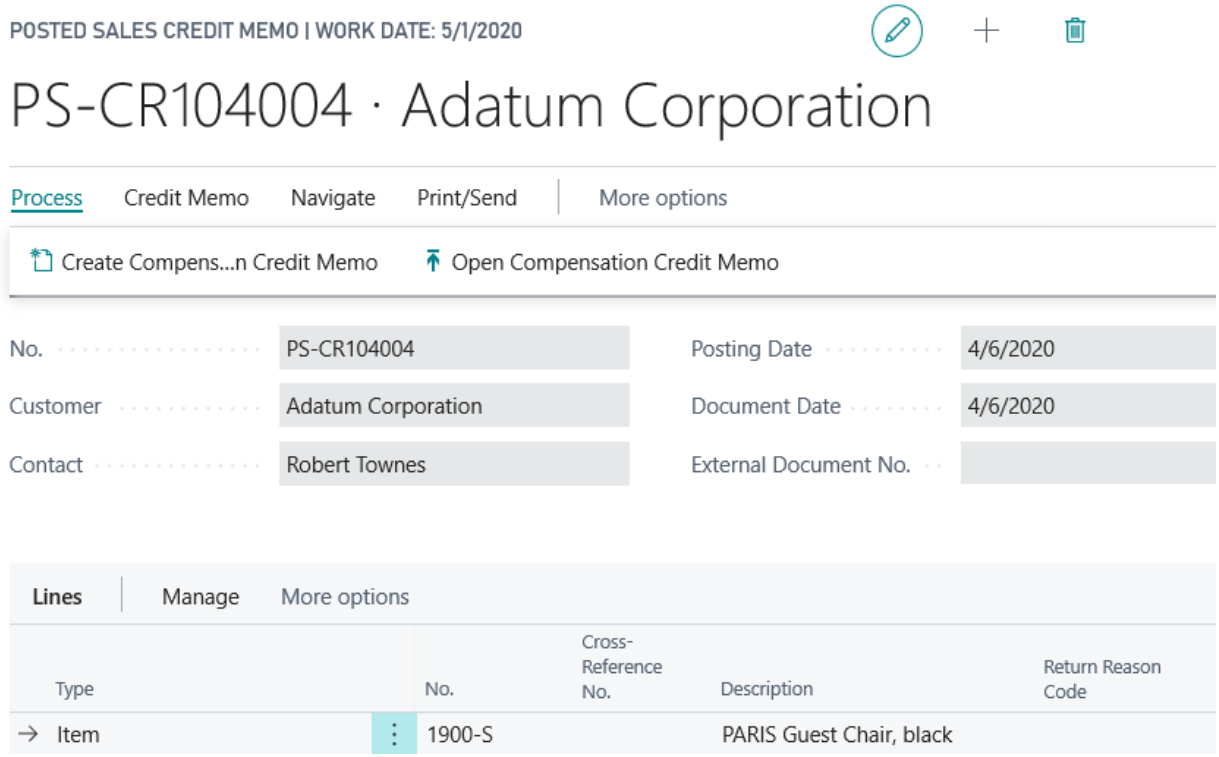
## Posted Sales Credit Memo

### Navigation

Posted Sales Credit Memos > No:



## Process




### *Create Compensation Credit Memo*

Creates a compensation sales invoice for the posted sales invoice.

### *Open Compensation Credit Memo*

Opens an existing compensation sales invoice in page SavvyComp Sales Document.

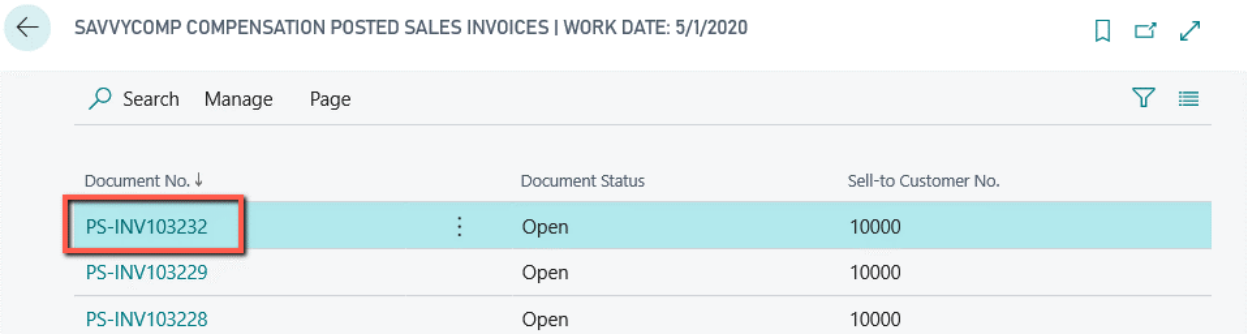
## SavvyComp Sales Document

### Navigation

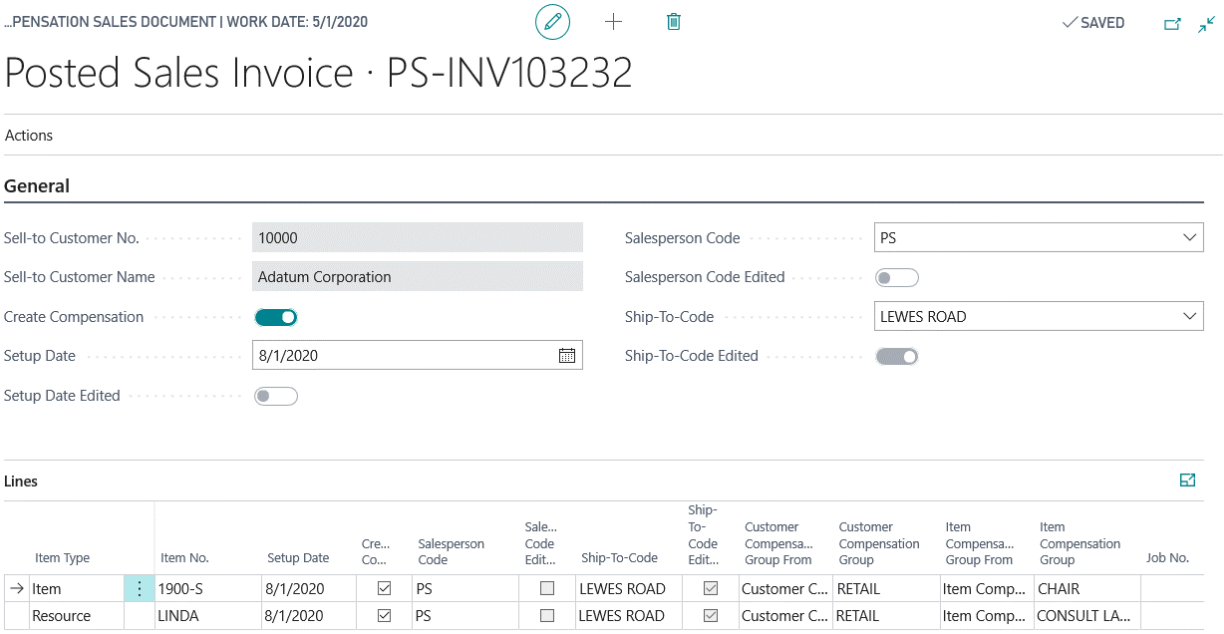
Business Central sales document pages (Posted Sales Invoice, Posted Sales Credit Memo, etc. > Open Compensation document (Invoice, Credit Memo, etc.)

Or

SavvyComp Compensation list page for the document type:



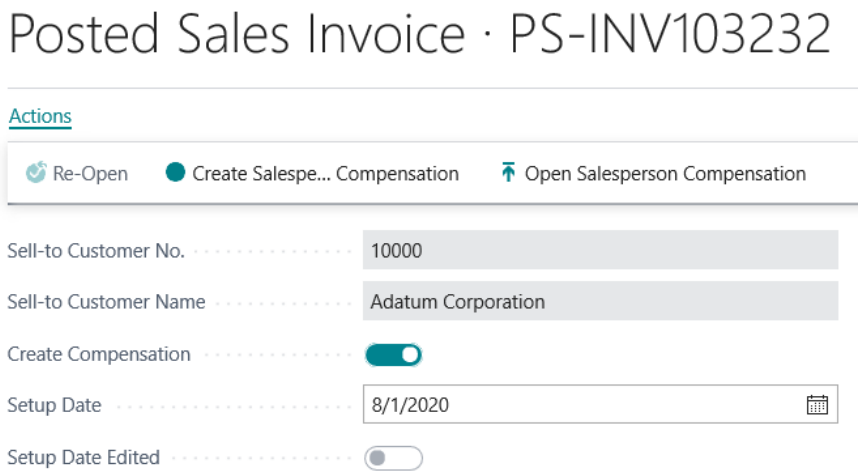
Entry




The Setup Date is set the Document Date of the sales document. The SavvyComp date-driven setups are based on this setup date. If you edit the date, the compensation document lines are recalculated, based on the new effective date for each setup. You can also directly edit the following:

- Salesperson Code
- Ship-to Code
- Customer Compensation Group
- Item compensation Group
- Job No.
- Job Compensation Group
- User-Defined Code
- User-Defined Compensation Group
- Territory Code

## Actions




### *Create Salesperson Compensation*

Creates salesperson compensation documents, based on the current compensation document. If salesperson compensation documents already exist, you'll be asked if you wish to delete them – choose **Yes** to delete and recreate or choose **No** to cancel.

### *Open Compensation Documents*

Opens page SavvyComp Salesperson Compensation Documents for the current compensation document.

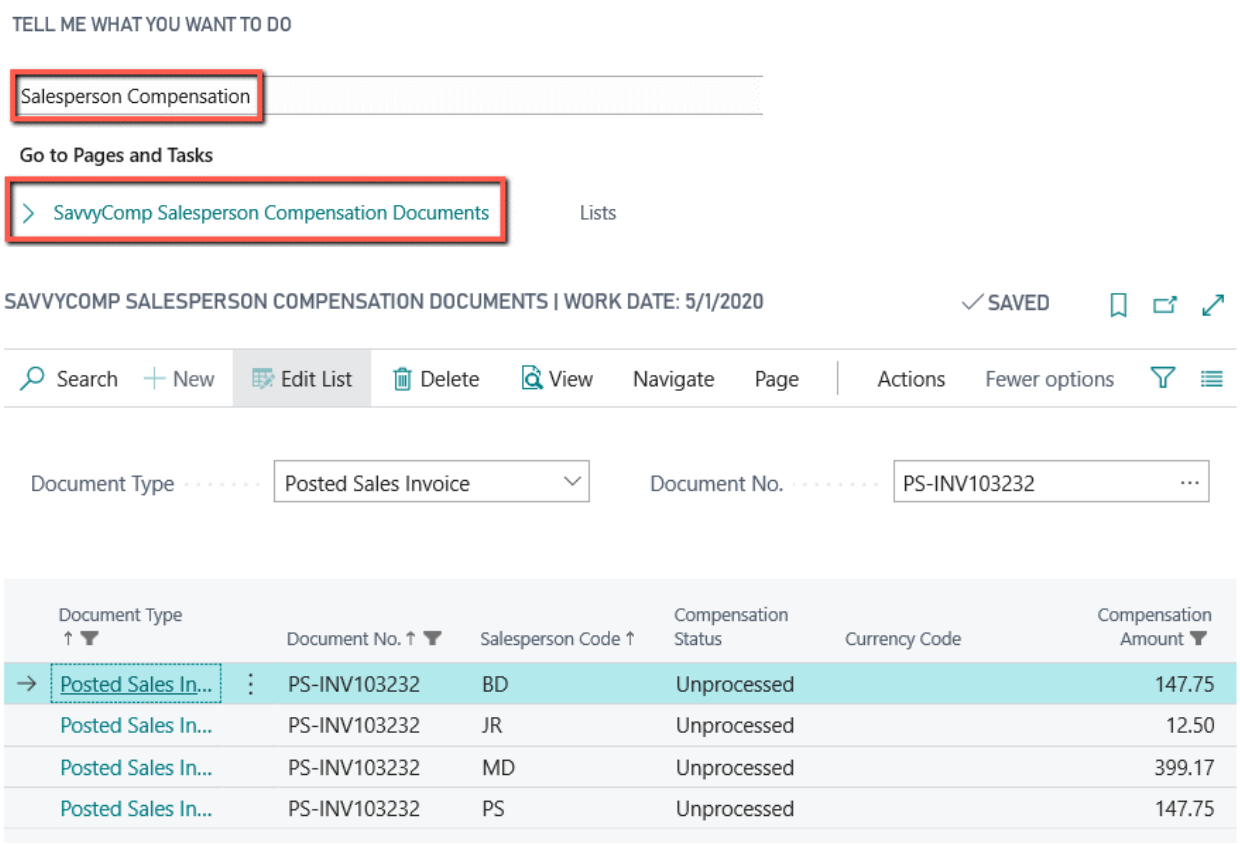
## SavvyComp Salesperson Compensation Documents

### Navigation

SavvyComp Sales Document > Actions > Open Compensation Documents

Or

Search for **Salesperson Compensation**:



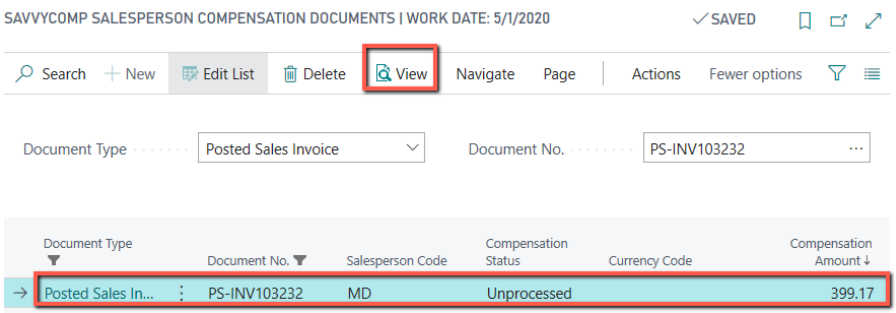

### List

The salesperson compensation documents are displayed. Select View to open page SavvyComp Salesperson Compensation Document.

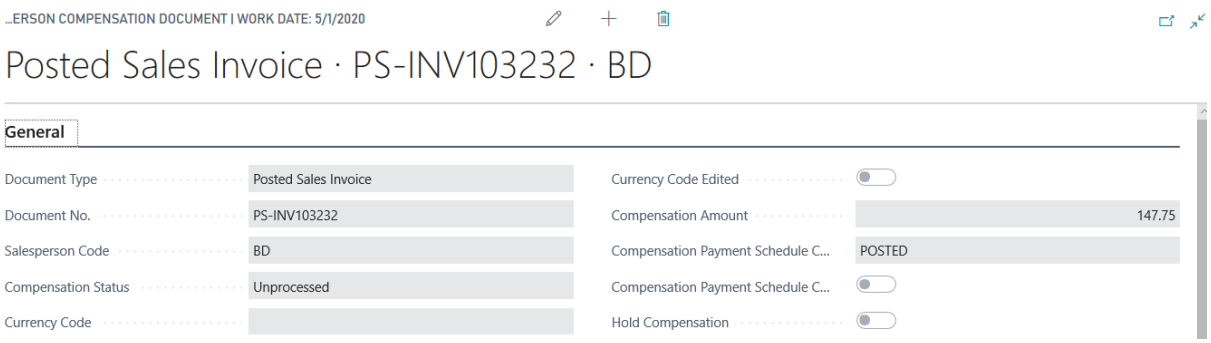
## SavvyComp Salesperson Compensation Document

### Navigation

SavvyComp Salesperson Compensation Document > View:

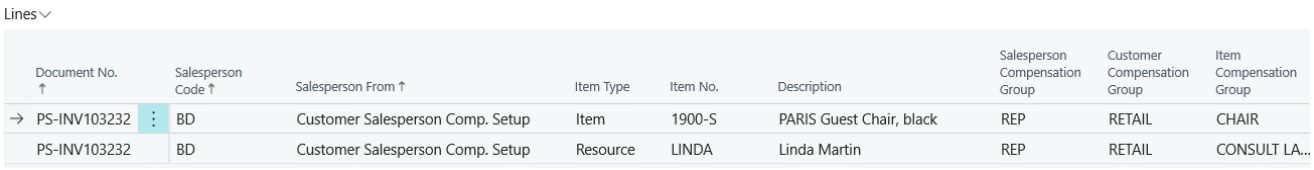



### General




The summary compensation information is displayed, including the **Compensation Amount**.

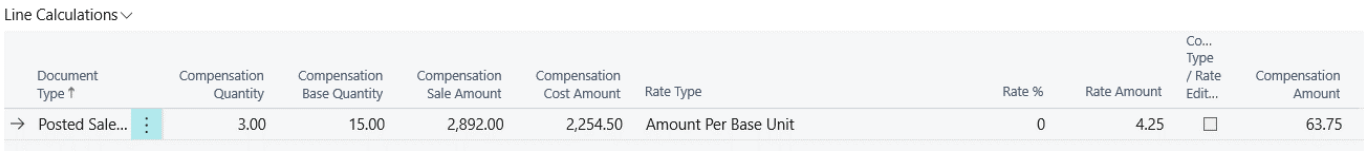
### Lines




Displays the compensation lines for the salesperson compensation document, including the compensation groups, split %, compensation quantity, and compensation amount.

Select a line to display the calculation steps.

### Line Calculations




Displays the calculation details for the salesperson compensation line.

In a future SavvyComp version, you'll be able to edit the salesperson compensation document.