

Controller Series Ver. 7.3 Bulletin 0024 Commission Management

Commission Management Menu

The Commission Management Menu is where you will track commissions. Commission can be setup by clerk, by customer, or user-customized ways. Use this menu to print or view commission reports. This menu is located at plate letters **BCC** or use vocabulary reference **COMM**.

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THE CONTROLLER SERIES SOFTWARE by Mainframe Associates (250) 729-0969
BCC                                     GENERAL 1.5.23
      COMMISSION Management Menu

F1 a Exit
F2 b Sales/Profit Report
F3 c Custom Commission Reporting

Please select an option: [ ]

Version 7.3 licensed to MAINFRAME ASSOCIATES for 24 users
  
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Commission Management Menu, BCC or COMM

F2 – Sales Report by Clerk Rep

This report is a generic sales report based on Sales Rep number being assigned to each customer number on Page 4 of the Customer Master Maintenance Screen.

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BCCB                                     Sales/Profit Report                                     7.3.0.008

Starting Sales Rep: 01 JOHN
Ending Sales Rep: 99 SETUP

Starting Date: 02/01/2006
Ending Date: 02/28/2006

Summary/Detail: Summary

Enter a Starting Rep, <F9> to Lookup, <F1> to Exit,...

Clear
F1 F2 F3 F4 F5 F6 F7 F8 F9 F10
Exit                                     Lookup Process
  
```

The report relies on Flags 26 and 246 being set appropriately. The user is offered a 'Summary' or 'Detailed' report. It is sorted by sales rep, dept and provides totals for Sales, COGS, Profit and Margin. The sales reps must be assigned to the customer prior to sales being generated. This is done by assigning the sales rep number for each customer in the Customer Master program on page 4.

F3 – Custom Commission Reporting

This menu option controls which reporting method you are going to use based on the information below. The program name is stored in Flag 399. This has been done to avoid confusion. In other words, only one commission method will be used at a site due to the setup of flags and files that maybe necessary.

How commissions are calculated depends on the setting of flags 26, 246, 248, 349, 370, 371, 401, and 402. Currently, there are five independent methods of calculating/reporting commissions. The first method has been discussed with option F2. The other four are outlined below and are subject to the appropriate program name being entered into flag 399 and flag settings.

Commission Method 2

Flag 26 = Y, F246 = Salesrep or Clerk, F248 = Profit or Cost, F349 = N, and Flag 399 is to read "STAFF.COMD386.COMMIS". Commissions are calculated for the clerk or the customer salesrep at EOD, based on the profit or cost of the sale, for different price levels. The following display allows the user to setup this information.

BCCB Commission Setup Screen for Employees 7.3.1.001									
Clerk Number []									
P1%	P2%	P3%	P4%	MTD Gross	[]				
[]%	[]%	[]%	[]%	YTD Gross	[]				
Sale	P/U	Show	Split	LYTD Gross	[]				
[]%	[]%	[]%	[]%						
Price 1	Comm	[]	[]	MONTH TO DATE		YEAR TO DATE		LAST YEAR TO DATE	
2	Comm	[]	[]						
3	Comm	[]	[]						
4	Comm	[]	[]						
OTHER									
Sale	Comm	[]	[]						
Pickup	Comm	[]	[]						
Show	Comm	[]	[]						
TOTALS		[]	[]						
Enter an employee number...									
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Exit						Reports			

NOTE: screen shot needs to be re-done after references to Pickup and Show and Split are removed.

Each salesrep is entered into the above screen. As part of this setup, you will have to identify what percentage of GROSS the salesrep will receive on items sold at the various price levels.

It is very important that the costs stored in the inventory are correct. The commission calculations depends on these being correct.

MTD, YTD and LYTD values are calculated at the end of each day. The F7 Reports option allows the user to print either a MTD or YTD report. These reports MUST be ran prior to EOM or EOY execution as the appropriate columns will be cleared as part of those processes.

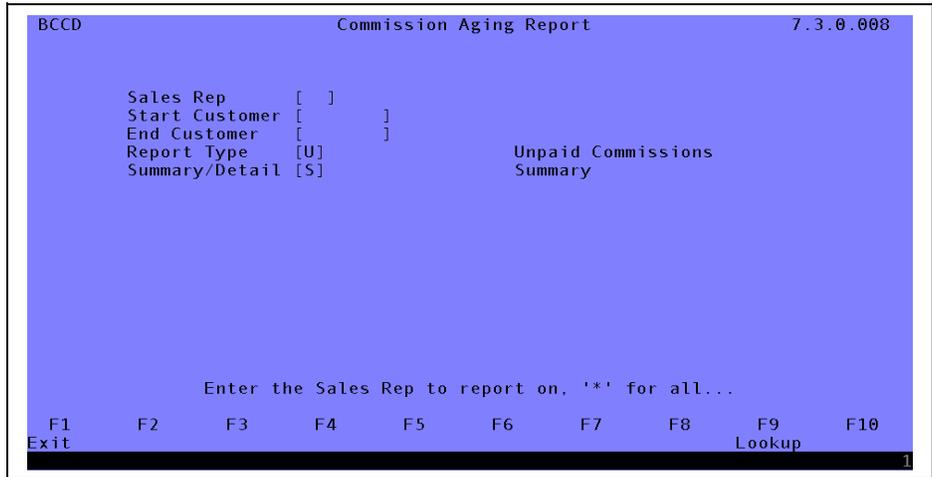
Commission Method 3

Flag 26 = N, flag 349 = Y1 or Y2. Commissions are paid based on a single commission rate as specified for the clerk for as setup in the Customer Master file on page 4. If set to Y1, commission is based on the net price, if Y2, it is based on the profit of the sale. Two reports for this calculation method are available when flag 399 has been set to "STAFF.CMD386.VELCAN": Both reports rely on the Customer be setup as an Open Item Customer.

From this option, users are given two different reports.

Commission Aging Report

The report filter offers the following options:



Commission Report by Sales Rep – Summary or Detail

BCCE		Commission Report		7.3.1.008	
Starting Date	[04/01/2006]				
Ending Date	[04/04/2006]				
Starting Rep	[01] Freddie The Eagle				
Ending Rep	[GI] Good Ideas				
Format	[D] Detailed				
Page Break	[N]				
Destination	[1]				
Enter a Starting Date....					
F1	F2	F3	F4	F5	F6
F7	F8	F9	F10		
Backup				Lookup	Process

The report sorts by sales rep, by customer all invoices and associated ROAs. The commission percentage and its calculated value display as well. Unless the invoice has been paid, the commission value will NOT appear on this report. The association of ROA and invoice is made when Open Item Disbursement has been completed.

Commission Method 4

The fourth method of calculation commissions is based on the customer being setup as an Open Item customer. The commission is calculated on PROFIT. The salesrep and commission percentage is assigned in the Customer Manager program on page 4. Flag 399 will contain "STAFF.CMD386.COMMRPT1". The report allows the user to "include payment detail" or not.

BCCE		Commission Report with Comm\$		7.3.6.002	
Starting Date	[04/01/2006]				
Ending Date	[04/04/2006]				
Starting Rep	[01] Freddie The Eagle				
Ending Rep	[GI] Good Ideas				
Report type	[S] Summary				
Include Payment Detail	[Y]				
Enter the starting date (mm/dd/yyyy)....					
F1	F2	F3	F4	F5	F6
F7	F8	F9	F10		
Exit				Process	

When the payment option is selected, the commission report is expanded to include the invoice payment amounts and the commission to be paid amounts. The report would appear as:

In Summary:

01/11/2005
Page: 1

BESTWAY PRODUCTS COMPANY
Salesman Summary Commission Report
For Reps: 1 LAINE 0 OGDEN/LOGAN to 1 CINDY 5 PROVO 50.TO P
For Periods: 01/01/2005 to 01/11/2005

	Amount	Cost	Margin	Commission	Amt Paid	Act Comm
Sales Rep: 1 CINDY 4 OREM NORTH TO LEHI						
ADOBRO - ADONIS BRONZE FOUNDRY	285.20	169.81	115.39	30.21	140.00	22.59
Totals for Rep: 1 CINDY 4 OREM N	285.20	169.81	115.39	30.21	140.00	22.59

In Detail:

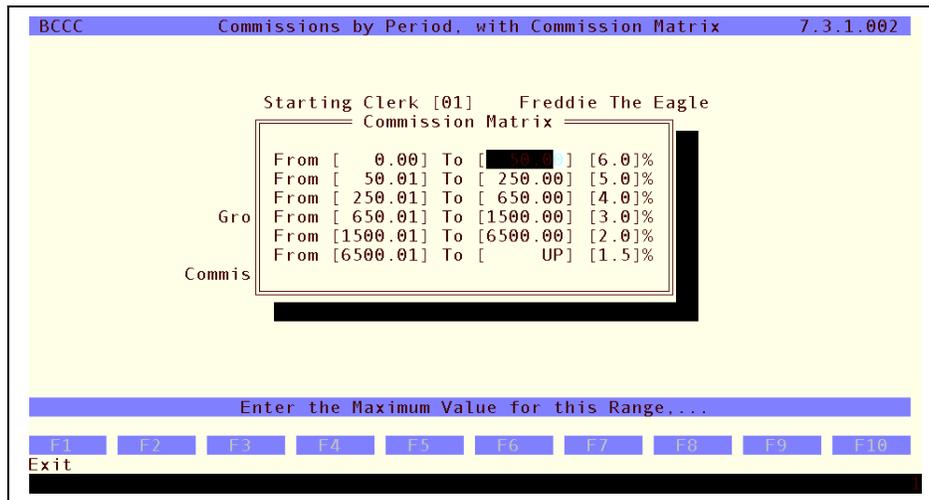
01/11/2005
Page: 1

BESTWAY PRODUCTS COMPANY
Salesman Detail Commission Report
For Rep: 1 CINDY 4 OREM NORTH TO LEHI
For Periods: 01/01/2005 to 01/11/2005

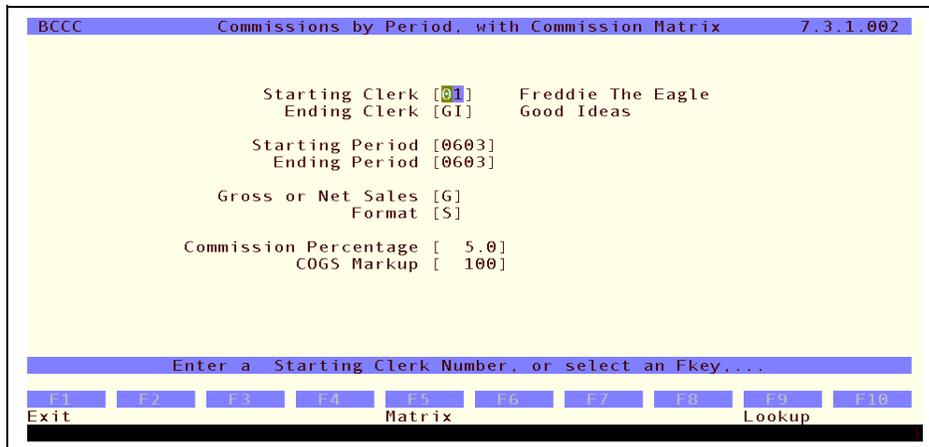
Invoice	Date	Amount	Cost	Margin	Commission	Amt Paid	Act Comm
ADOBRO - ADONIS BRONZE FOUNDRY							
36292A	01/06/2005	185.20	119.81	65.39	19.62	40.00	12.00
36307A	01/08/2005	100.00	50.00	50.00	10.59	100.00	10.59
Totals for ADOBRO		285.20	169.81	115.39	30.21	140.00	22.59
Totals for Rep: 1 CINDY 4 OREM N		285.20	169.81	115.39	30.21	140.00	22.59

Commission Method 5

The fifth commission calculation option is based on a dollar range matrix for Gross margin calculation or markup for Net Sales. Flag 399 would contain the program name of "STAFF.CMD386.COMMEFST". The matrix has some defaults but can be modified by selecting F5 option. The following screen will display and require user input when F5 has been selected.



When the matrix has been saved, commissions are now calculated based on \$\$s and percentages stored in matrix and calculated on Gross sales.



When 'G'ross sales is chosen, the Commission Percentage and COGS Markup fields will not be active.

When 'N'et sales is chosen, the user is able to select the commission percentage to use in the calculations. The COGS Markup will be in percent, so 140 = 40% markup, 90 = 10% decrease, and so on.

The report for Net sales will be created. In detail, it will show the following:

Invoice Date	Item	Qty	Cost	Sales	Profit
Commission					
12345A 08/15/2005	12345-6789	2	125.00	199.98	74.98
3.75					

The cost is determined by the inventory cost and multiplied by the COGS Markup value entered by the user. Note: if an item is sold below cost, the commission will be zero, while returns receive negative commissions. This report will be sorted by clerk, with a subtotal for each clerk and a total for the entire report.

In summary, it will show:

Clerk	COGS	Sales	Profit	Commission
10 - Arnold Gill	21235.87	33243.56	12007.69	600.38

with totals for the entire report.