SOP OPENING A SALES REP COMMISSION DOCUMENT

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TABLE OF CONTENTS

AIM

To open a sales rep commission document.

This document displays the commissions due to a sales rep for the sales concluded by the rep. It is intended mainly for external sales reps that are not employees of the company. The document lists the invoices on the basis of which the commissions are calculated, the percentage of commission and the payment details.

SETUPS

- Sales reps are defined in the system.
- Purchase invoices are recorded in which the sales rep bills the company for commission due.

PROCEDURE

STAGE ONE: VIEWING THE REP'S SALES

There are a number of reports you can run to view the sales concluded by the rep and which can form the basis of the commission document. All of these reports are listed in the Sales Rep Reports menu (menu path: Marketing and Sales > Sales Reps). The choice of report to use is a matter of company policy (e.g., whether to pay per invoice or per customer payment). The list of reports includes the following:

- Invoices per Sales Rep
- Sales per Sales Rep
- Receipts per Sales Rep
- Outstanding Debts per Rep.

STAGE TWO: OPENING A COMMISSION DOCUMENT AUTOMATICALLY

Run the Prepare Commission Documents program. In the List of Customer Invoices form opened by the program, retrieve the invoices for which commission should be paid. You can view the commission documents opened by the program, and make any necessary revisions, by retrieving them in the Sales Rep Commission form (see details below).

STAGE THREE: OPENING A COMMISSION DOCUMENT MANUALLY

1. Open the Sales Rep Commission form.
2. Specify the Sales Rep Number and the Planned Payment Date.
3. If a purchase invoice was received from the sales rep (and recorded in the system), specify its number in the Purchase Invoice column.
4. If commission is due for orders made by a single customer, indicate the Customer in question. Note: This commission document will subsequently appear in the Sales Rep Commission sub-level of the Customers form.
5. Enter the Commission Items sub-level form, and specify the customer invoices for which commission should be paid. Select the relevant Document Code, then move to the Invoice column and click the magnifying glass to access a target form in which you can retrieve the desired invoice. Place the cursor on the line for the invoice in

question; then press F8 to exit the target form and copy the invoice number into the Commission Items form. The Amount of Commission appears automatically, but may be revised. Note: You can specify a different document code for each line item.

6. After performing the payment to the sales rep, record the resulting journal entry number in the Entry No. (Paymt) column (in the upper-level form).

RESULTS

- A sales rep commission document, on which to base payments, is opened in the system.
- Each such document includes details of the invoices for which payment is due.