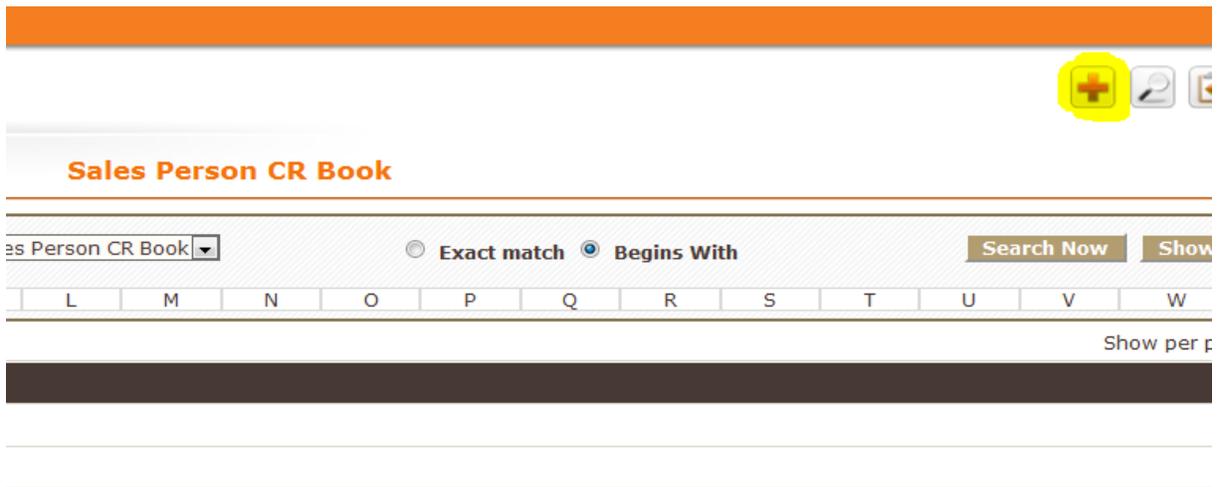


# Sales Person Commissions

Sales person commission plans can be set up and run through Fuse5. The first step in the process is to create your Commission Rate Books. In order to create a sales person commission plan go to PERSONAL & ADMIN > SALES PERSON COMMISSIONS > SALES PERSON COMMISSION RATE BOOKS. Once you have navigated to this page you will be in the Sales Person CR Book listings page. To create a new commission rate book click the orange plus button.



Once you have opened up a new commission rate book you will be asked to give it a name and then save it.



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Once saved you can go ahead and EDIT the commission rate book by clicking the EDIT button.

Sales Person Commission Rates Books	
Sales Person CR Book Name	Jay Wright

Once in the interface that allows you to create the commission rate book you will find directions in red and help files (orange ? Marks) that will help guide you through the process.

Not all criteria are required for every commission plan. Ensure you choose the appropriate accounts (by using Sales Person, Account, or Sales Group) and the appropriate parts by using (Report Codes, Line Codes, Subline or Product Number). Use the help files (?) next to each line item to create the appropriate commissions structure for your business. This page is used to set up the commissions structure.

**Sales Person** - By choosing the Sales Person you will get commission data for all accounts in which the person chosen is the Sales Person. This is based on SLI (Sales Line Item) data, meaning that the Sales Person assigned to the account at the time the sales order is created would get commissions for the sale.

In the event that you have an overlap of sales people and want to run commissions for someone other than the assigned salesperson when the sale was created, use the Sales Group option.

**Account** - Choose an individual account that the sales person will receive commissions for.

Add New Sales Person Commission Rate Rule	
Sales Person :	Dennis - Sales ?
Account :	+ ?

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**Sales Group** - Choose a sales group for which commissions will be paid. This can be used if you have a secondary sales person that receives commissions on a account that currently has a primary sales person.

**Report Codes** - User can assign a Report Code to a product record. If Report Codes are assigned to products then the user can select a Report Code in the Commission Rate Book and only parts / products sold with that Report Code will be eligible for commissions.

**Line Code** - Choose the line codes that commissions should be paid out for. Include FRT for freight, LAB for labor, and MSC for miscellaneous if applicable.

**Subline** - Choose the sublines that commissions should be paid out for. If NO subline is chosen, commissions will be calculated for all parts / products within the chosen Line Codes.

Sales Group :	<div data-bbox="1068 745 1404 919"><ul style="list-style-type: none"><li>Used Car Dealers</li><li>Test Group</li><li>Parts Plus Jobber Stores</li><li>Parts Plus Installer</li><li>New DEV sales Group</li></ul></div> 
Report Codes :	<input data-bbox="1068 940 1247 982" type="text"/> 
Line Code :	<div data-bbox="1068 995 1203 1165"><ul style="list-style-type: none"><li>ZZ1</li><li>ZZ4</li><li>ZZS</li><li>ZZY</li><li>ZZZ</li></ul></div> <p data-bbox="1068 1176 1300 1205">Hold CTRL to select multiple.</p> <p data-bbox="1068 1224 1240 1253">SELECT ALL: <input checked="" data-bbox="1182 1224 1203 1253" type="checkbox"/> </p>
Subline :	<div data-bbox="1068 1276 1203 1446"><ul style="list-style-type: none"><li>.....</li><li>0</li><li>04</li><li>1</li><li>100</li></ul></div> 

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**Product Number** - Commissions will be paid for this part / product number only if number is entered. If you are entering individual part numbers they should not be entered in the same rule with line codes in which they are not found. Individual parts should be added as separate rules in the Commission Rate Rules (CRR).

**Order Qty** - Commissions will only be paid for sales orders that contain at least this ship quantity of a given part. This does NOT add up quantities from multiple sales orders.

**CRR Percent** - This is the percent paid for commissions. Enter in numeric format and not as a decimal.

**Commissions Based On** - This is the Net Sales amount that will be used to determine the commission.

Product Number :	<input type="text"/>	?
Order Qty :	<input type="text"/>	?
CRR Percent :	10.0 (###.##)	?
Commissions Based On :	<ul style="list-style-type: none"><li>Sell Price</li><li>Core Sell Price</li><li>Tax</li><li>Shop Parts</li></ul>	?

**Sales Orders Paid** - If YES, commissions will only be paid on sales orders that have been paid / have had payments applied to them. (entire outstanding balance must have payment applied, partial payments result in the sales order not being PAID for the purposes of commissions).

If BOTH, sales orders that have not been paid / have not had payments applied to them along with sales orders that have been paid / have payments applied to them will have commissions applied. Sales orders from previous time periods that have had payments applied during the selected time period will be added to the commissions.

**Commissions Paid On** - Commissions should be based on either Net Sales (based on above chosen calculation less returns) or Net Profit (which will exclude the Cost of Goods Sold and returns) from the

## Fuse5 Training Materials

above based calculation.

**Commissions Threshold** - If "NO", salesperson only get's commissions on dollars above the threshold. If "YES" salesperson get's commission on all sales above and below the threshold. Enter the amount of either Net Profit or Net Sales that must be achieved in order to be eligible for commissions.

**Sales Orders Paid Time Frame** - This is the time period prior to current commission time period that Fuse5 will go back to review sales order invoices that had their status changed from Paid=NO to Paid=YES. If you pay commissions for sales orders that were created outside of the commission time period on a charge account, but have now been paid by the customer during the current commission time period, these sales orders will be included in the commission calculation.

Example.....When a user does a commission report for the month of July and they have selected 3 months with this setting, the commission should include everything that is already here, plus, based on this new setting, any sales orders that were listed as Paid=NO during the last 3 months prior to the current commission time period, but in July the status changed to Paid=YES.

<b>Sales Orders Paid :</b>	Yes <input data-bbox="1203 905 1230 940" type="button" value="?"/>
<b>Commissions Paid On :</b>	Net Sales <input data-bbox="1247 970 1274 1005" type="button" value="?"/>
<b>Commissions Threshold :</b>	Yes <input type="text" value="300"/> <input data-bbox="1393 1035 1421 1071" type="button" value="?"/>
<b>Sales Orders Paid Time Frame :</b>	3 Months <input data-bbox="1252 1100 1279 1136" type="button" value="?"/>
<input type="button" value="Save CRR"/> <input type="button" value="Cancel"/>	

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Once you have chosen all of your commission criteria click on the SAVE CRR button.

Commissions Paid On :	Net Sales	?
Commissions Threshold :	Yes	300 ?
Sales Orders Paid Time Frame :	3 Months	?
		Save CRR Cancel

Search CRR Delete

At this point you will see the CRR (Commission Rate Rule) show up under the CRR Details section. The CRR is still editable and you can have more than one rule in a single commissions plan.

CRR Details															
Sales Person	Account	Sales Group	Report codes	Line Code	Subline	Product Number	Ord Qty	CRR %	Commissions Based On	Sales Orders Paid	Commissions Paid On	Commissions Paid Below Threshold	Commissions Threshold Amount	Sales Orders Paid Time Frame	
Dennis				001, 011, 012			0	10	Sellprice, CoreSellPrice, Tax, ShopParts	Yes	Net Sales	Yes	300.00	3 Months	

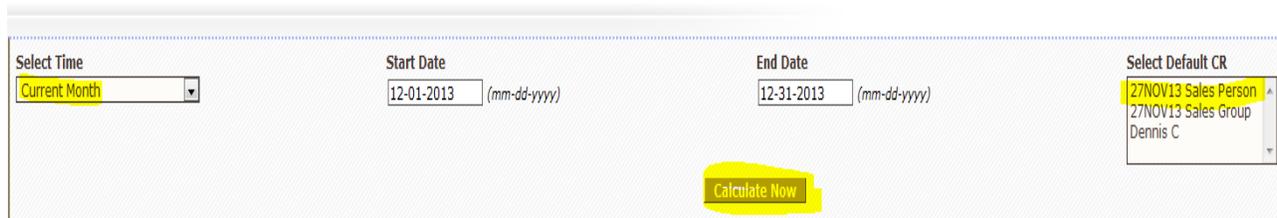
Save Cancel

In order to actually run a report for your sales person go to **PERSONAL & ADMIN > SALES PERSON COMMISSION**. If running a report for a CRR that is based on a specific sales person it is important that you choose the same user in this interface that is listed as the sales person in the CRR. If you are running a commission report based on a sales group you can choose any user. Choose your salesperson from the Login Name column by clicking on the VIEW button (looks like a calendar page) under the View Total Commissions column. All users are defaulted to show up on the Sales Person Commission page. To remove a user from this page go to **PERSONAL & ADMIN > SETTINGS > USERS > choose the user you want to remove > Sales Person Commissions Module User (setting) > Change to NO**.

**missions Module User (setting) > Change to NO.**

	View Total Commission
	
	
	
	
	
	
	
	
	

Once in the Sales Person Commission Detail interface you will be prompted to select a time period (which can be a custom time period with a start and end date of your choosing). Choose the time period (Either from the Select Time drop down or from the custom start and end date) and then Select the Default CR, (meaning the CRR commissions rate book) that should be created prior to running commissions reports. Once you have selected these click the CALCULATE NOW button.



The screenshot shows a form with the following fields:

- Select Time:** A dropdown menu with "Current Month" selected.
- Start Date:** A text input field containing "12-01-2013" with a "(mm-dd-yyyy)" label.
- End Date:** A text input field containing "12-31-2013" with a "(mm-dd-yyyy)" label.
- Select Default CR:** A dropdown menu with "27NOV13 Sales Person" selected, and "27NOV13 Sales Group" and "Dennis C" as other options.
- Calculate Now:** A yellow button with the text "Calculate Now" highlighted.

: the time period (Either from the Select Time drop down or from the custom start and end date) and then Select the Default CR, (meaning the CRR commissions rate book) that should be created prior to running commissions reports. ou have selected these click the CALCULATE NOW button

Once you have clicked CALCULATE NOW the report will run and you will get your results. The report will display the total commission ( as well as any lost commission based on returns). The report can be exported as either an HTML document or spreadsheet.

# Fuse5 Training Materials

## HTML Export

Mozilla Firefox

https://dev.gofuse5.com/index.php?module=SalesPersonCommission&action=SalesPersonCommissionAjax&file=ExportReport&startdate=12-01-2013&enddate=12-31-2013&isadmin=1&userid=4326016&reportType=PDF&defa

Fuse5 **www.fuse5.com**

777 Beach Front Dr.  
Bora Bora, NH 98714  
USA  
Ph : 319-248-5658  
Fax : 319-248-2536

Commission Detail

FROM DATE : 12-01-2013  
TO DATE : 12-31-2013  
For : Dennis  
CURRENT DATE : 12-16-2013

Total Commission For Dennis : \$ 194.63

Id	SO Number	Report Codes	Line Code	Sub Line	Product#	Sell qty	Account Name	Account#	Cost	Ext Cost	Core	Ext Core	Tax	Shop Part	Extended	Paid (Y/N)	Commission Paid On	COGS								
1	1-315265		RCJ		PART7	6	Robert Iglehart	A5017	\$3.80	\$22.80	\$0.00	\$0.00	\$1.59	\$0.00	\$24.39	Yes	\$24.39	\$12.00								
2	1-315261		RCJ		PART7	6	Robert Iglehart	A5017	\$3.80	\$22.80	\$0.00	\$0.00	\$1.59	\$0.00	\$24.39	Yes	\$24.39	\$12.00								
3	2-315235		RCJ		part8	1	Robert Iglehart	A5017	\$5.70	\$5.70	\$0.00	\$0.00	\$0.40	\$0.00	\$6.10	Yes	\$6.10	\$0.00								
4	2-315235		RCJ		part8b	1	Robert Iglehart	A5017	\$2.00	\$2.00	\$0.00	\$0.00	\$0.14	\$0.00	\$2.14	Yes	\$2.14	\$0.00								
5	2-315235		RCJ		part8c	1	Robert Iglehart	A5017	\$2.00	\$2.00	\$0.00	\$0.00	\$0.14	\$0.00	\$2.14	Yes	\$2.14	\$0.00								
6	2-315212		RCJ		part3	3	Robert Iglehart	A5017	\$25.65	\$76.95	\$0.00	\$0.00	\$5.38	\$0.00	\$82.33	Yes	\$82.33	\$40.50								
7	2-315214		RCJ		part3	3	Robert Iglehart	A5017	\$25.65	\$76.95	\$0.00	\$0.00	\$5.38	\$0.00	\$82.33	Yes	\$82.33	\$40.50								
8	2-315207		RCJ		part3	33	Robert Iglehart	A5017	\$25.65	\$846.45	\$0.00	\$0.00	\$59.25	\$0.00	\$905.70	Yes	\$905.70	\$445.50								
9	2-315144		VIS		6344	2	Robert Iglehart	A5017	\$143.77	\$287.54	\$0.00	\$0.00	\$20.12	\$0.00	\$307.66	Yes	\$307.66	\$0.00								
10	2-315144		GD		HO1790102	3	Robert Iglehart	A5017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Yes	\$0.00	\$0.00								
11	2-315144		DAY		64440	1	Robert Iglehart	A5017	\$89.45	\$89.45	\$0.00	\$0.00	\$6.26	\$0.00	\$95.71	Yes	\$95.71	\$47.08								
27	1-315062		TRN		200201	1	Robert Iglehart	A5017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Yes	\$0.00	\$0.50								
28	1-315062		TRN		NapaBox	1	Robert Iglehart	A5017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Yes	\$0.00	\$3.50								
29	1-315062		LAB		999200	1	Robert Iglehart	A5017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Yes	\$0.00	\$10.00								
30	2-314916		TRN	1	Part1	2	Robert Iglehart	A5017	\$21.34	\$42.68	\$12.00	\$24.00	\$4.67	\$0.00	\$71.35	Yes	\$71.35	\$42.47								
31	2-314862		TRN	1	Part1	1	Robert Iglehart	A5017	\$21.34	\$21.34	\$12.00	\$12.00	\$2.33	\$0.00	\$35.67	Yes	\$35.67	\$21.23								
32	2-314862		LAB		LABOR	1	Robert Iglehart	A5017	\$19.00	\$19.00	\$0.00	\$0.00	\$1.34	\$0.00	\$20.34	Yes	\$20.34	\$10.00								
33	2-314862	XYaB	FRT		FREIGHT	1	Robert Iglehart	A5017	\$3.80	\$3.80	\$0.00	\$0.00	\$0.27	\$0.00	\$4.07	Yes	\$4.07	\$2.00								
34	2-314862	Commission Part	WIX		51515	1	Robert Iglehart	A5017	\$3.80	\$3.80	\$0.00	\$0.00	\$0.27	\$0.00	\$4.07	Yes	\$4.07	\$2.00								
<b>Total</b>																	<b>\$ 1,947.40</b>									
<b>Commissions Paid Below Threshold</b>																	<b>Yes</b>									
<b>Commissions Threshold Amount</b>																	<b>\$ 0.00</b>									
<b>Total Commission</b>																	<b>\$ 1,947.40</b>									
<b>Return Sales Orders</b>																										
1	2-314868		TRN		Part2	-1	Robert Iglehart	A5017	\$1.00	\$-1.00	\$0.00	\$0.00	\$-0.08	\$0.00	\$-1.08	Yes	\$-1.08	\$-13.00								
<b>Total Commission</b>																										
<b>Total Sell Commission</b>									<b>Total Return Commission</b>									<b>Total Commission For : Dennis</b>								
<b>\$ 194.74</b>									<b>\$ -0.11</b>									<b>\$ 194.63</b>								