



Process Sales Rep Commissions

This guide will go through the commission run process in Interprise.

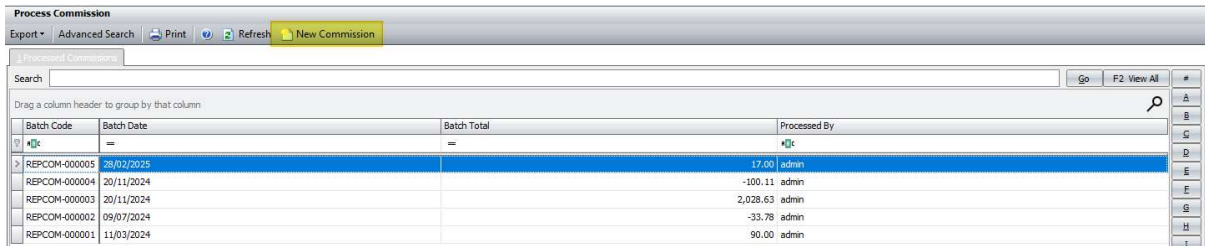
There are other guides to go through setting up sales reps and also configuring where the commission % comes from.

From the customer module, the process commission option can be found within the "Other" menu dropdown.



Any previous commission runs which have been completed can be see in the list. Double clicking one of the previous ones would open up the details.

To start a new commission run, click the "New Commission" button (highlighted below).





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Process Sales Rep Commissions

This will open up the Sales Rep Commission Wizard. A date (1) can be specified which will limit the transactions which the commission run will pull through.

For example, if the run is being retrospectively for month end, a month end date could be entered to prevent transactions in the current month from being brought into the commission run.

Once the desired date has been entered, click next (2) to continue.

Sales Representative Commission Wizard

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Welcome to Sales Rep Commission Wizard.

This wizard will guide you through processing the Sales Rep commission.

Get all commission up to 28/02/2025 1

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Process Sales Rep Commissions

The next screen contains a list of the sales reps. Tick the rep(s) (3) which need to be processed and then click next (4).

| Chk | SalesRep Group Code | SalesRep Group Name | Address |
|-------------------------------------|---------------------|---------------------|---------|
| <input checked="" type="checkbox"/> | REP-000001 | Super Sales Agent | |
| <input type="checkbox"/> | REP-000002 | Sales Rep 2 | |
| <input type="checkbox"/> | REP-000003 | Josh | |
| <input type="checkbox"/> | REP-000004 | Mr Sales Rep | |



Process Sales Rep Commissions

The next screen shows the transactions for the rep(s) ticked on the previous page.

The transactions which should be processed can now be ticked using the tick boxes (5). There are select all/none buttons at the top right (highlighted). These can be used to tick/untick lots of transactions quickly.

There are also small "+" buttons on the left (highlighted) which can display the lines on the transactions (6).

The commission split % (commissions could be split between multiple reps) is shown on the grid (7) along with the commission total (8) and once the transaction is ticked, a value will be put into the paid (9) column.

On the item lines, the commission % (10) can be viewed along with the commission amount (11) for that particular line on the transaction.

There are also totals at the bottom (12) for these figures.

Once the required transaction(s) are ticked and the totals at the bottom are correct, click next (13) to continue.

Sales Representative Commission Wizard

Invoices
Please select the invoices to be included in the compilation.

| Chk | Document Co... | Document Da... | Customer Name | Total | Outstanding | In Dispute | Reason | Comm Split | Comm Total | Paid |
|-----------------------------------------|----------------|------------------------|---------------------|-------------|-------------|--------------------------|-------------|------------|------------|------------|
| SalesRep: REP-000001: Super Sales Agent | | | | | | | | | | |
| <input type="checkbox"/> | CCNOTE-000... | 09/10/2024 | A Toy Customer U... | -2.64 | -2.64 | <input type="checkbox"/> | | 100.000% | (£ 0.22) | £ 0.00 |
| <input type="checkbox"/> | CCNOTE-000... | 18/11/2024 | A US Customer In... | -48.00 | -48.00 | <input type="checkbox"/> | | 100.000% | (£ 4.80) | £ 0.00 |
| <input type="checkbox"/> | CCNOTE-000... | 09/12/2024 | A Toy Customer U... | -21.24 | -21.24 | <input type="checkbox"/> | | 100.000% | (£ 1.80) | £ 0.00 |
| <input type="checkbox"/> | INV-000358 | 31/10/2024 | A French Customer | 877.19 | 877.19 | <input type="checkbox"/> | | 100.000% | £ 87.72 | £ 0.00 |
| <input type="checkbox"/> | INV-000366 | 18/11/2024 | A US Customer In... | 267.28 | 267.28 | <input type="checkbox"/> | | 100.000% | £ 26.73 | £ 0.00 |
| <input type="checkbox"/> | INV-000503 | 11/02/2025 | A French Customer | 30.70 | 30.70 | <input type="checkbox"/> | | 100.000% | £ 1.75 | £ 0.00 |
| <input checked="" type="checkbox"/> | INV-000506 | 11/02/2025 | A French Customer | 175.44 | 175.44 | <input type="checkbox"/> | | 100.000% | £ 17.54 | £ 17.54 |
| <input checked="" type="checkbox"/> | INV-000507 | 11/02/2025 | A French Customer | 133.33 | 133.33 | <input type="checkbox"/> | | 100.000% | £ 13.33 | £ 13.33 |
| <input type="checkbox"/> | INV-000528 | 18/02/2025 | Nat new lead test | 23.23 | 0.00 | <input type="checkbox"/> | | 100.000% | £ 0.20 | £ 0.00 |
| <input checked="" type="checkbox"/> | INV-000592 | 12/03/2025 | Nat new lead test | 15,601.03 | 15,601.03 | <input type="checkbox"/> | | 100.000% | £ 1,300.09 | £ 1,300.09 |
| Detail | | | | | | | | | | |
| | Item Name | Description | Line Num | Ext Price | Apply To | Comm % | Comm Amount | | | |
| | 100 Frame | 100 Frame EC:123456789 | 1 | £ 13,000.86 | Sales | 10.000% | £ 1,300.09 | | | |
| | | | | £ 13,000.86 | | | £ 1,300.09 | | | |
| <input type="checkbox"/> | INV-000609 | 12/03/2025 | A US Customer In... | 7,091.43 | 7,091.43 | <input type="checkbox"/> | | 100.000% | £ 709.15 | £ 0.00 |
| | | | | | | | | | £ 2,149.69 | £ 1,330.96 |

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Process Sales Rep Commissions

The summary screen will be displayed which shows a summary per rep so that it is clear how much each rep should be paid.

Click next to continue or back if changed need to be made.

| Chk | SalesRep Group Code | SalesRep Group Name | Class Type | Commission To Pay |
|-------------------------------------|---------------------|---------------------|------------|-------------------|
| <input checked="" type="checkbox"/> | REP-000001 | Super Sales Agent | | £ 1,330.96 |

£ 1,330.96

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On the final screen, click finish to complete the commission run.

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Completing the Sales Rep Commission Wizard.

You have successfully completed the Wizard.

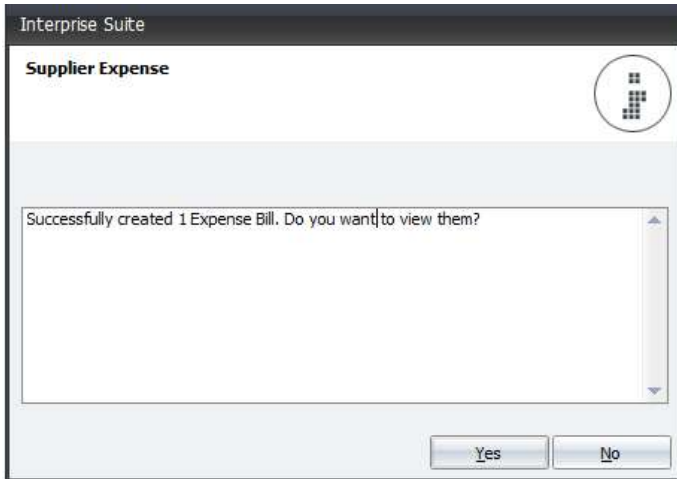
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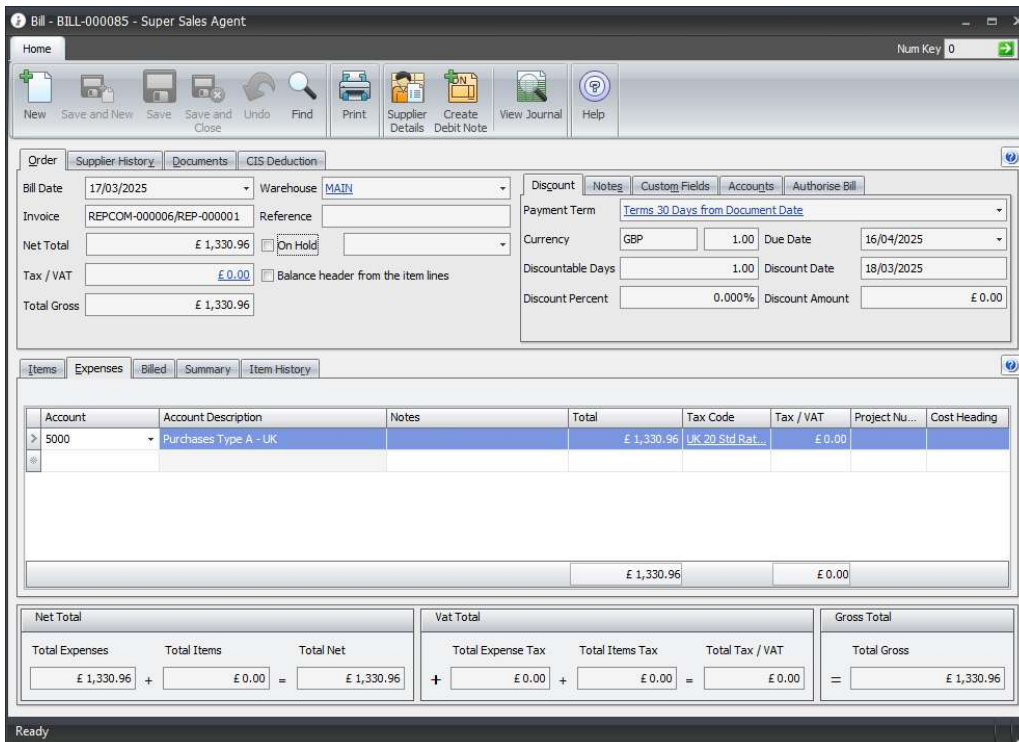
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If the rep was setup as an agent (see sales rep setup guide), a supplier bill will be raised for the commission.

This is so that the rep can be paid via a supplier payment run as they aren't paid via payroll.



An example of a rep bill can be seen below.



Once the run is complete, it can be re-opened from the historical list as shown on page 1 of this guide.