
DSM326 Agent Commission Maintenance

<i>Overview</i>	As Agents usually work on a commission basis, the details of the commission rates need to be defined. The rate can be a fixed dollar amount or a percentage of sales ex tax and there can be multiple start dates. The commission can be defined by title level.
<i>Purpose</i>	This panel allows you to: <ul style="list-style-type: none">Add a Commission Table for an AgentChange a Commission Table for an AgentCopy a Commission Table for an AgentDelete a Commission Table for an AgentDisplay Details of a Commission Table for an Agent

Explanation

The difference between settings up an Agent as opposed to a Sales Representative is that Sales Reps do not always earn a commission on sales. But the Agent Commission table and reports can be used for Sales Representatives territories by making the Agent code the same as the Sales Representative code. **TMSDS/AG-REPD** controls that switch of an Agent to be the same as a Rep. If the Agent is set to equal the Sales Rep, the Agent code being equal to the Rep defaults in all relevant ordering programs. The existing Commission Reports can be used for Agents and Sales Reps.

The Agent File allows selection of the Customer Classifications. Catering for the need to have different percentage commission based on the combination of the product sold and to whom it is sold.

An Agent code is entered, if applicable, in Order Entry Format B.

The system refers to the Commission Rate table to determine the amount of commission due to be paid. A report of these calculated commissions can be printed and reviewed. There is an interface to Accounts Payable from where the Cheque is produced.

Credit Notes are taken into consideration when calculating commission as the Credit Note is offset against the Invoice when entered. An Agent Code is cannot be entered during Credit Note entry as the Credit Note picks up the code from the invoice against which it is allocated at entry time.

A Backorder Report is available showing commission to be paid. This report can be used to anticipate payment or if commission is paid on orders rather than invoices, this backorder amount would be included in a payment.

Setup Requirements

1. Add Agent as a Creditor to Accounts Payable.
2. **TMSDS/AG-GALC** Enter the G/L Expense Account and the Creditor number, if each Creditor is going to be posted to a separate expense account.
3. Add Agent Code to DSM326 and the preferred method of calculation, % or Fixed amount.
 - **TMSDS/AG-REPD** indicates whether to default the Agent from the Rep Code
 - **TMSDS/CM-SLRP** indicates the Rep/Agent on the Customer Masterfile and Academic Database

Process

1. Order processing to use **Format B** which replaced Sales Rep Code with Agent code.
2. Process orders until complete to **C** status.
3. Generate Accrual records.
4. Generate Report for verification.
5. Create Actual Accounts Payable (A/P) transactions.
6. Posted transactions can be viewed in A/P inquiries.
7. Purging should take place in Month End of posted transactions.

Examples

This section illustrates examples concerning:

[Example 1: Add a Commission Table for an Agent](#)

[Example 2: Change a Commission Table for an Agent](#)

[Example 3: Copy a Commission Table for an Agent](#)

[Example 4: Delete a Commission Table for an Agent](#)

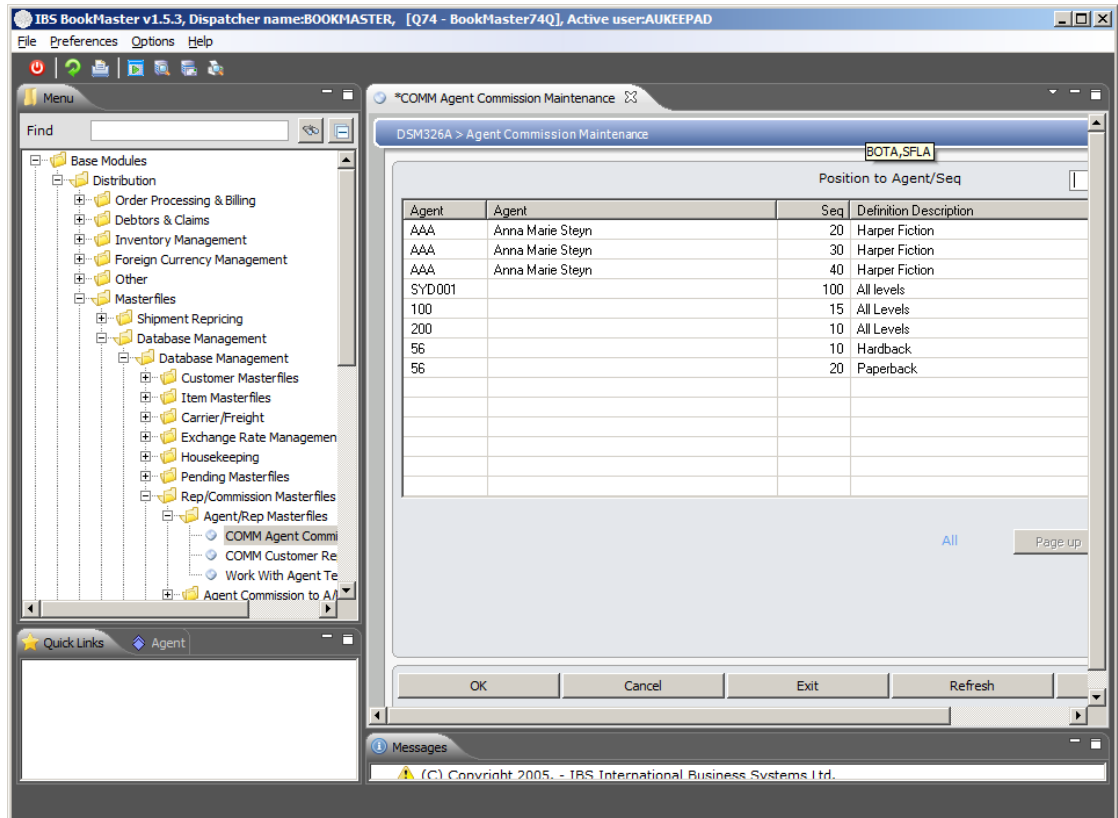
[Example 5: Display Details of a Commission Table for an Agent](#)

Example 1: Add a Commission Table for an Agent

This example describes how to add a commission table for an agent.

1. Select option **COMM Agent Commission Maintenance** from Base Modules>Distribution>Masterfiles>Database Management>Database Management>Rep/commission Masterfiles>Agent/Rep Masterfiles menu

DSM326A Agent Commission Maintenance panel is displayed.



Options

- Change** Access DSM326B Agent Commission Maintenance in change mode for changing details of agent commission definition.
- Copy** Access DSM326B Agent Commission Maintenance in copy mode for copying details of agent commission definition to another.
- Delete** Access DSM326B Agent Commission Maintenance in delete mode to delete details of agent commission definition.
- Display** Access DSM326B Agent Commission Maintenance in inquiry mode to inquire on details of agent commission definition.

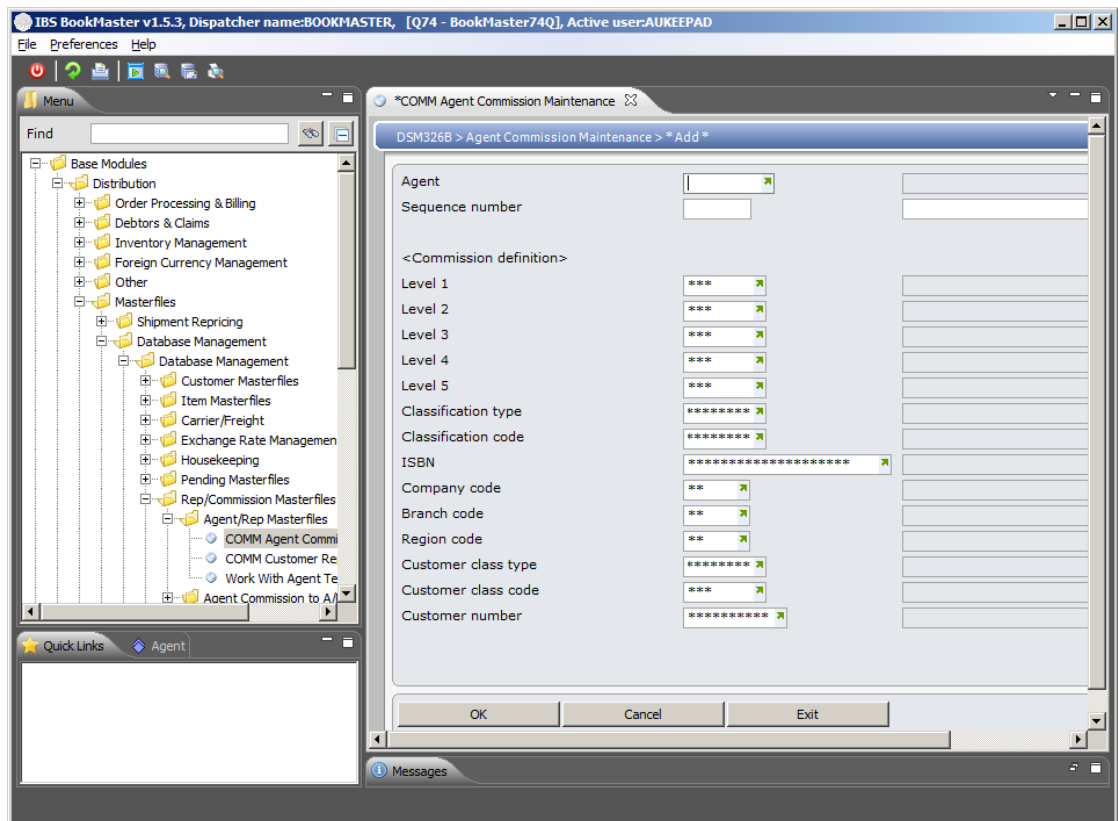
Function

Add

Access DSM326B Agent Commission Maintenance in add mode for addition of agent commission table.

2. Click Add.

DSM326B Agent Commission Maintenance panel is displayed in add mode.



Relevant Fields

Agent

In Agent Commission Maintenance this code identifies a sales agent. If interfacing to Accounts Payable, an Agent could be linked to a Creditor Number.

Agent Codes are not defaulted in Sales Order Entry so if an Agent Code is applicable for an order, the code must be entered.

In Work with Agent Territory Maintenance, this code identifies a Sales agent.

Sequence number

In Restriction Rule Maintenance indicate the sequence number for the definition, which determines the order of priority for this definition in relation to other definitions with the same restriction type. For example, 1 = highest priority and 10 = lower priority.

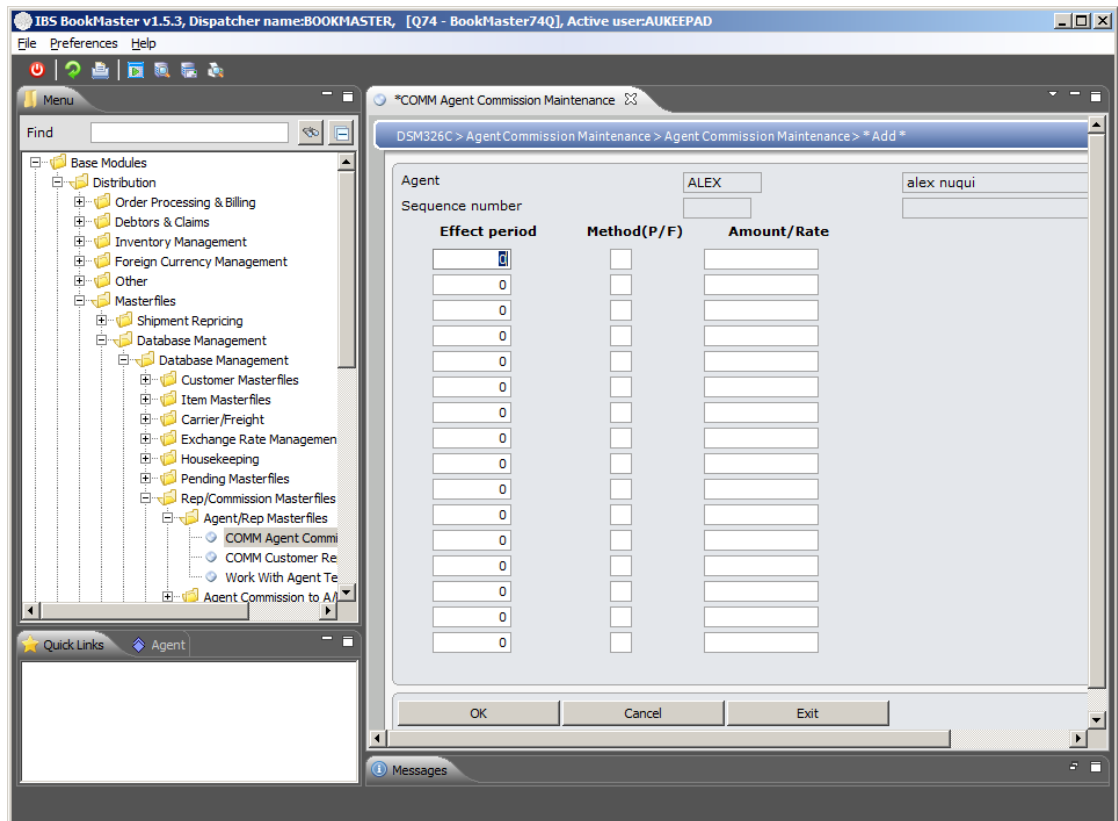
In Agent Commission Maintenance a sequence number is used for multiple commission definitions per agent starting

at title level then using hierarchy levels down to using a wildcard selection for various defining fields.

Level 1-5	Enter the hierarchy levels 1-5 to which the commission table applies.
Item classification type	Enter the classification type to which the commission table applies.
Item classification code	Entry in this field will be influenced by the selection made in the Classification type field. If a classification type was selected, enter the classification code applicable to the classification type.
ISBN	If the commission table is to apply to one ISBN only, enter the ISBN here.
Company code	If the commission table is to apply to one company only, enter the company code in this field.
Branch code	If the commission table is to apply to one branch only, enter the branch code in this field.
Region code	If the commission table is to apply to one region only, enter the region code in this field.
Customer class type	Enter the customer classification type to which the commission table applies.
Customer class code	Entry in this field will be influenced by the selection made in the Customer Classification type field. If a classification type was selected, enter the classification code applicable to the classification type.

3. Key in required fields and click **OK**. Asterisks '***' indicate a 'catch all', which means that the value for the field has not been specified. This instructs the system to select the first valid definition for the specified field.

DSM326C Agent Commission Maintenance panel is displayed in add mode.



Relevant Fields

Effect period

Enter the period for which the percentage or rate of commission is to be effective.

Method (P/F)

The method of calculating commission is either a flat rate or a percentage of sales ex tax (net) for the month.

P = Percentage of net sales value per month

F = Flat Rate

Amount/Rate

Base amount

In Carrier Zone Charges Maintenance the base amount is the freight amount applicable to the break value.

For example:

If the break value is \$200 and the Base Amount is \$25 and the Rate Basis is 1% then for every extra dollar the invoice is over \$200, an additional 1% of the invoice value is added as freight charges.

Amount/Rate

In Agent Commission Maintenance depending on the Method of calculation chosen, either the Amount of the Flat Rate must be entered or the Percentage must be entered.

4. Click **OK** until the message Record addition successfully completed displays.

Example 2: Change a Commission Table for an Agent

This example describes how to change a Commission Table for Agent.

1. Repeat step **1**, **2** and **3** as in [Example 1: Add a Commission Table for an Agent](#)
2. Select existing table and click **Change**.

DSM326B Agent Commission Maintenance panel is displayed in change mode.

3. Make required changes and click **OK**.

Example 3: Copy a Commission Table for an Agent

This example describes how to copy a Commission Table for Agent.

1. Repeat step **1**, **2** and **3** as in [Example 1: Add a Commission Table for an Agent](#)
2. Select existing table and click **Copy**.

DSM326B Agent Commission Maintenance panel is displayed in copy mode.

3. Enter new agent and click OK. Details from first commission table get copied to new one.

Example 4: Delete a Commission Table for an Agent

This example describes how to delete a Commission Table for Agent.

1. Repeat step **1**, **2** and **3** as in [Example 1: Add a Commission Table for an Agent](#)
2. Select existing table and click **Delete**.

DSM326B Agent Commission Maintenance panel is displayed in delete mode.

3. Click **Delete** to confirm deletion.

Example 5: Display Details of a Commission Table for an Agent

This example describes how to display details of a Commission Table for Agent.

1. Repeat step **1**, **2** and **3** as in [Example 1: Add a Commission Table for an Agent](#)
2. Select existing table and click **Display**.

DSM326B Agent Commission Maintenance panel is displayed in inquiry mode.