

# Sales Commission based on Cash Receipt User Manual

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## Overview

This extension for Dynamics 365 Business Central allows you to calculate and pay the sales commission when the payment is received from your customer.

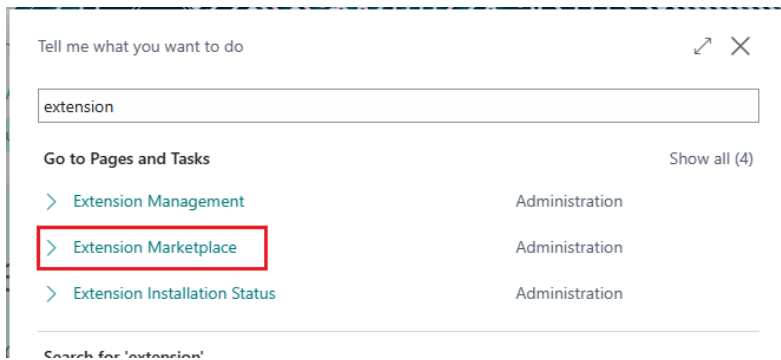
- The commission can be defined based on the Salesperson card or based on the items if you pay commission based on items.
- The sales commission is only calculated and paid when cash is received from the customer. In addition, partial commissions are calculated when the customer does not pay the invoice in full.
- The user will be able to specify the Commission % either on the Salesperson card or on the Item card. The commission will be calculated accordingly.

## Setup

The Progress Payment Invoicing app is installed and setup per Tenant. When using this app with different tenants, you must follow the following instructions in each tenant.

### Subscription Setup – Purchase your license

- 1) Open the Extension Marketplace



- 2) Search “Sales Commission based on Cash Receipt” in the AppSource to find the Sales Commission based on Cash Receipt app and open the information page.


AppSource | Apps for Business Central

Apps (0) | Other apps ▾ |

**Search results for “Sales Commission based on Cash Receipt”**  
Showing 1 results in apps. [Clear search](#)


Sort By: Best match ▾

All results



**Sales Commission based on Cash Receipt**

AP Commerce

 Business Central

Save time calculating commissions for your salespeople.

★ 5.0 (8 ratings)


Starts at Free

[Buy now](#)

3) Click on **Buy Now**.

AppSource | Apps for Business Central

< Apps



[Buy now](#)

**Sales Commission based on Cash Receipt**

AP Commerce


★★★★★<sub>5.0 (8)</sub>

**Overview** | [Plans + Pricing](#) | [Ratings + reviews](#)

Save time calculating commissions for your salespeople. Commissions form a significant component of many companies' salespeople compensation. However, Dynamics 365 Business Central's standard commission report hinges on sales rather than cash receipts. **The solution lies in the Sales Commission based on Cash Receipts**


4) Click on **Buy now**

Apps > Sales Commission based on Cash Receipt



**Sales Commission based on Cash Receipt**

by AP Commerce

 Dynamics 365 Business Central

★ 5.0 (8 ratings)

Starts at Free | [Buy now](#) | [Contact me](#)

Overview | **Plans + Pricing** | [Ratings + reviews](#) | [Details + support](#)

Plan	Description
Standard Monthly Plan	\$30 per user per month (minimum 3 users)


5) Select a plan and click **Next**.

Apps > Sales Commission based on Cash Receipt > **Checkout**

## Checkout

- Plan
- Price + billing
- Payment
- Complete purchase

Select a plan



**Sales Commission based on Cash Receipt**

**Standard Monthly Plan** Free trial

Description  
**\$30 per user per month (minimum 3 users)**

Number of users  
3-1,000,000

Price/payment options  
1-month subscription

- First month free, then \$30.00/user/1-month

[Next](#)

6) Go through the Billing information pages.

Apps > Sales Commission based on Cash Receipt > **Checkout**

## Checkout

- Plan
- Price + billing**
- Payment
- Complete purchase

**Price + billing**

**Billing term** ⓘ \*  
1-month subscription

**Price/payment options** ⓘ \*  
First month free, then \$30.00/user/1-month

**Recurring billing** ⓘ \*

On  
 Off

**Number of users (3-1,000,000) \***

3

Up next, choose your payment method:

<p><b>Credit card</b></p> <p>Use a credit card to make an online payment</p>	<p><b>Invoice pay <span style="color: #007bff;">New!</span></b></p> <p>If your organization has been approved for payment by invoice, see...</p>
------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------

[Back](#)
[Next](#)

7) Enter your payment information.

Apps > Sales Commission based on Cash Receipt > **Checkout**

## Checkout

- Plan
- Price + billing
- Payment**
- Complete purchase

### Payment

Product name	Price (USD)	Quantity
Offer: Sales Commission based on Cash Receipt Plan: Standard Monthly Plan <span style="background-color: #e8f5e9; padding: 2px;">Free trial</span>	First month free, then \$30.00/user/one-time payment	3
Billing term	1-month subscription	
Recurring billing	On	

#### Sold-to address \*

Enter the address of the legal entity responsible for payment and identified on the invoice. The address provided here is used to determine your tax rate.

#### Billing account

AP Commerce, Inc. ▼

[Edit](#)

AP Commerce, Inc.  
12304 Santa Monica Blvd. STE 300  
Los Angeles, CA 90025-2593  
US

#### Bill to \*

Select the billing profile you want to use for this purchase. You can also edit an existing profile. [Learn more about billing profiles](#)

#### Billing profile

APC - ▼

[Edit](#) + [Add new](#)

[Back](#)

[Place order](#)

8) Click on the **Place order**.

## Summary

Subtotal after trial (before tax):

Estimated taxes: ⓘ

**Total:**

Back

Place order

- 9) After you place your order, click on **Assign license** to open the **Microsoft 365 admin center**.

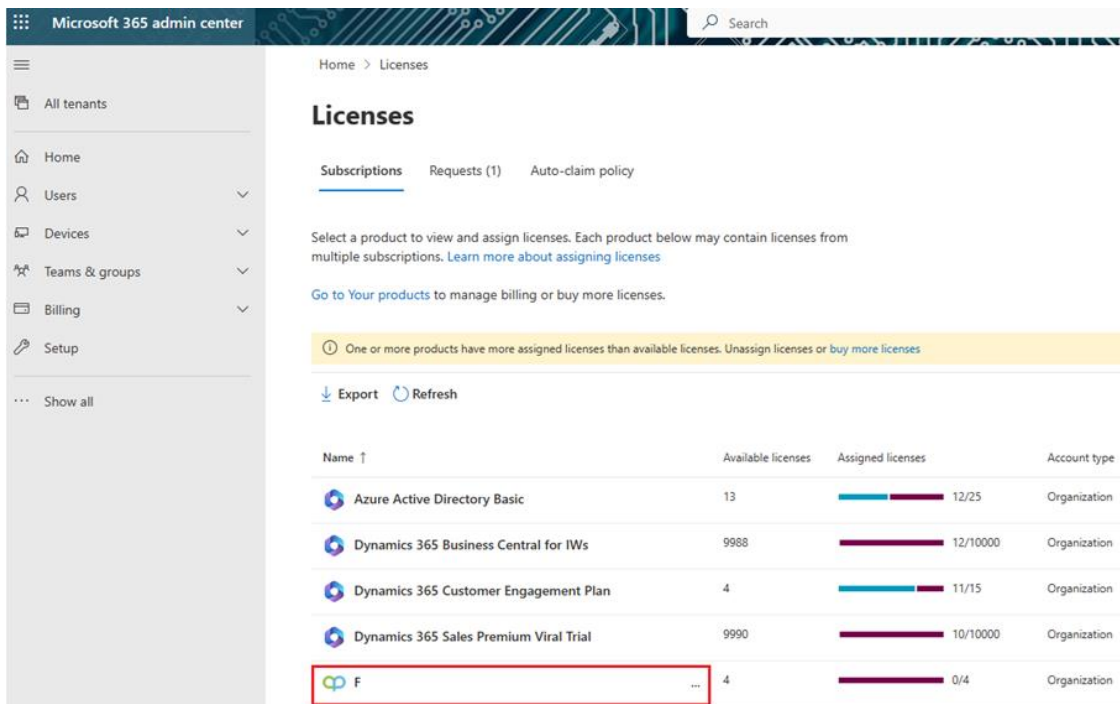
### Next steps

Now, assign the licenses you purchased to users in your tenant via [Admin center](#). From there you can proceed to install this app. To manage your licenses anytime, click on your account at the top right, open [Admin center](#) and go to [Licenses](#).

Back

Assign licenses

- 10) Click on the app that is just purchased.



Microsoft 365 admin center

Home > Licenses

## Licenses

Subscriptions Requests (1) Auto-claim policy

Select a product to view and assign licenses. Each product below may contain licenses from multiple subscriptions. [Learn more about assigning licenses](#)

[Go to Your products](#) to manage billing or buy more licenses.

ⓘ One or more products have more assigned licenses than available licenses. [Unassign licenses](#) or [buy more licenses](#)

Export Refresh

Name ↑	Available licenses	Assigned licenses	Account type
Azure Active Directory Basic	13	12/25	Organization
Dynamics 365 Business Central for IWs	9988	12/10000	Organization
Dynamics 365 Customer Engagement Plan	4	11/15	Organization
Dynamics 365 Sales Premium Viral Trial	9990	10/10000	Organization
<b>F</b>	4	0/4	Organization

- 11) Click on **Assign Licenses** to assign the licenses to the users that will be using the app.

Home > Licenses > License details

[Back to Licenses](#)



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Plan

Licenses

**4** available

0 assigned of 4 total

[Install this product](#)

Users

Manage and view licenses for your users.

[+ Assign licenses](#) [↓ Export users](#) [↻ Refresh](#)

<input type="checkbox"/>	Name	Email	Type
--------------------------	------	-------	------

12) If you already have the app installed, you do not need to complete steps 13 through 15.

13) Once you have assigned your licenses, click on **Install this Product** to install the app in your tenant.

Home > Licenses > License details

[Back to Licenses](#)



Published by AP Commerce

Licenses

**4** available

0 assigned of 4 total

[Install this product](#)

14) Select an environment and click on **Install**.

**Dynamics 365 Business Central** ×

We see that you have more than one environment available. Select the environment that you want to access.

- Production
- SBTW
- SBAlex
- SBUS

[Install](#)

15) Choose a language and click on **Install**.

### Extension Installation ↗ ✕

Choose language

Language ..... English (United States) ⋮

**Note: There might be other users working in the system.**

Installing extensions during business hours will disrupt other users.

After installation, your session will refresh, and you can set up your extension.

---

**Install**

## Canceling the Subscription

- 1) To Cancel Subscription, open the **Microsoft 365 admin center** and go to **Billing>>Your Products**.
- 2) Click on the app you want to cancel the subscription for and click on **Cancel Subscription**.

## Permissions

Be sure to assign the **APESALES COMMISSION** permission sets to the users that will be processing commissions.

## Sales Commission Setup

The Sales Commission based on Cash Receipt App is setup per company. When using this app with different companies, you must follow the following instructions in each company.

1. Choose the icon that opens the **Search** feature, enter **“Sales Commission Setup”** and click on the related link:

Tell me what you want to do

sales commission setup

Go to Pages and Tasks

> Sales Commission Setup

Administrative

Search for 'sales commission setup'

 Search company data

2. Define the setup that you wish to use:





✓ Saved



# Sales Commission Setup

## General

Default Commission P... · G/L Account

Default Commission P... · 71140

## Commissionable Type

G/L Accounts Commis... ·

Resources Commissio... ·

Items Commissionable ·

Fixed Assets Commis... ·

- a. General Fasttab
  - i. **Default Commission Purchase Type:** Defines the line type of the created purchase document.
  - ii. **Default Commission Purchase No.:** Defines the No. to use when creating commission purchase invoices.
- b. Commissionable Type Fasttab
  - i. G/L Accounts Commissionable
    - 1. Defines whether G/L Accounts sales are commissionable.
  - ii. Items Commissionable
    - 1. Defines whether Items sales are commissionable.
  - iii. Resources Commissionable
    - 1. Defines whether Resources sales are commissionable.
  - iv. Fixed Assets Commissionable
    - 1. Defines whether Fixed Assets sales are commissionable.

## Salesperson Setup

Assign a Commission Vendor No. on the Salesperson/Purchaser Card. When commission invoices are created, it will use the Commission Vendor No. on the Salesperson to create the purchase order/invoice.

Be sure to define the **Commission %** on the Salesperson card if you want to calculate the commission based on the order.

Salesperson/Purchaser Card



# JO · Jim Olive

[Home](#) | [Salesperson](#) | [More options](#)

[Create Interaction](#) | [Send Email](#)

## General

Show more

Code	<input type="text" value="JO"/>	Email	<input type="text" value="JO@contoso.com"/>
Name	<input type="text" value="Jim Olive"/>	Next Task Date	<input type="text" value="-"/>
Job Title	<input type="text"/>	Blocked	<input checked="" type="checkbox"/>
Commission %	<input type="text" value="5.00"/>	Commission Vendor	<input type="text"/>
Phone No.	<input type="text"/>		

No. ↑	Name
10000	Fabrikam, Inc.
20000	First Up Consultants
30000	Graphic Design Institute
40000	Wide World Importers
50000	Nod Publishers
...	...
+ New	

## Invoicing

Department Code  Customergroup Code

### Item / Resource/ G/L Account / Fixed Asset Setup

If your sales commission is based on the sale of item, resource, G/L account, or fixed assets, then you will need to define the commission in the respective cards.



# 1000 · Bicycle

[Home](#) | [Request Approval](#) | [Item](#) | [Prices & Discounts](#) | [Actions](#) | [Related](#) | [Reports](#) | [Automate](#) | ...

## Item

Show less

No.	<input type="text" value="1000"/>	Item Category Code	<input type="text"/>
Description	<input type="text" value="Bicycle"/>	Automatic Ext. Text	<input checked="" type="checkbox"/>
Blocked	<input checked="" type="checkbox"/>	Common Item No.	<input type="text"/>
Type	<input type="text" value="Inventory"/>	Purchasing Code	<input type="text"/>
Base Unit of Measure	<input type="text" value="PCS"/>	Variant Mandatory if ...	<input type="text" value="Default (No)"/>
Last Date Modified	<input type="text" value="10/30/2023"/>	<b>Item Commission Pct.</b>	<input type="text" value="0.00"/>
GTIN	<input type="text"/>		

## User Guide

When payment receipt or credit memos are posted and applied to the sales invoice, this app will link the received or credited amount to the sales invoice and calculate the commission amount. Be sure to assign the **APSALESCOMMISSION** permission sets to the users that will be processing commissions.

### Calculate Sales Commissions

- 1) Choose the icon that opens the **Search** feature, enter **Salesperson Commission Worksheet** and click on the related link to bring up the **Salesperson Commission Worksheet**.

Tell me what you want to do



commission

#### Go to Pages and Tasks

- > Sales Commission Setup Administration
- > Salesperson Commission Worksheet Lists

#### Go to Reports and Analysis

- ☰ Salesperson Commission Reports and Analysis
- ☰ Salesperson - Commission Reports and Analysis

#### Search for 'commission'

- 🔍 Search company data
- 🔍 Search Help

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

- 2) Click on the **Calculate Commission**, enter the **Payment Start Date** and **Payment End Date** on the request page then click **OK**.

Salesperson Commission Worksheet

 Search
  Analyze
  Edit List
  Delete
  Calculate Commission
  Create Commission Purchase Document
  Find entries...

Customer No.	Application Type	Salesperson Code	Application Posting Date	Application Amount	Document Type	Document No.	Posting Date
→ 10000	Payment	JO	1/19/2022	817.47	Invoice	PS-INV103002	1/19/2022
10000	Payment	JO	1/23/2022	11,631.80	Invoice	PS-INV103007	1/23/2022
20000	Payment	JO	1/18/2022	172.94	Invoice	PS-INV103001	1/18/2022

## Calculate Commission



### Options

Payment Start Date .....  

Payment End Date .....  

### Advanced >

3) The process will generate new entries with commission amount reference to related payment amount. The explanation of the fields will be detailed in the **Appendix** section.

### Commission on Order

If you calculate the commission based on the order, you should edit the following:

- a. Salesperson Commission % - The commission % for the order
- b. Adjust Order Commission (LCY) – The commission that’s calculated based on the cash applied to the invoice and what’s commissionable. This is the amount that will be used to create the commission purchase document.



reports ▾ Automate ▾ Fewer options

Salesperson Commission %	Original Amount (LCY)	Order Commission Basis (LCY)	Application Amount (LCY)	Adjusted Order Commission (LCY)	Co
5	817.47	771.20	817.47	38.56	
5	11,631.80	10,973.40	11,631.80	548.67	
5	172.94	164.70	172.94	8.24	
5	2,420.78	2,305.50	2,420.78	115.28	
5	809.76	771.20	809.76	38.56	
5	206.30	192.80	206.30	9.64	




### Commission on Items

If you calculate the commission based on the line items, you should edit the following:

- Drill down into the **Adjusted Line Commission (LCY)** to look at the line commissions that are calculated for the order.

← Salesperson Commission Detail ✓ Saved  

---

Analyze
  Edit List
  Delete
   

Source Document Type ↑	Type	No.	Line Amount	Line Commission %	Line Commission... (LCY)	Adjusted Line Commission (LCY)	Commiss Basis (L
→ Invoice	Item	1896-S	5,004.00	1.00	50.04	50.04	5,004
Invoice	Item	1972-S	380.20	2.00	7.60	7.60	380
Invoice	Item	1996-S	5,589.20	5.00	279.46	279.46	5,589

- Line Commission %** - The commission that's associated with the Item, Resource, G/L Account, and Fixed Assets
- Adjusted Line Commission (LCY)** – The commission that's calculated based on the cash applied to the invoice and what's commissionable on the line. This is the amount that will be used to create the commission purchase document.

### Creating the Commission Purchase Documents

When you are ready to create a commission Purchase document, **Create Commission Purchase Documents**

Salesperson Commission Worksheet

Customer No.	Application Type	Salesperson Code	Application Posting Date	Application Amount	Document Type	Document No.	Posti
10000	Payment	JO	1/19/2022	817.47	Invoice	PS-INV103002	1/19

Select the **Document Type** for the Commission Purchase document and whether commission is paid on the **Order Level** or the **Item Level** on the **Commission On** field.

### Convert Commission To Purchase Document

Use default values from ..... Last used options and filters

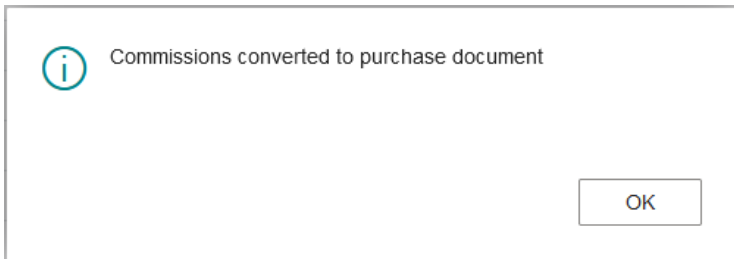
#### Options

Document Type ..... Order

Commission on .....  
 Item Level  
 Order Level  
 Item Level

Schedule... OK Cancel

Once complete, the following message will appear.



#### Find Entries

This Action group will show you associated source documents to the commissions.

Purchase Document	Related	Reports	Automate	Few
	Find entries >	Show Document		
	Posting Date	Show Application Document		
02	1/19/2022	5	817.47	
07	1/19/2022	5	11,024.00	

- Show Document
  - This will show records associated with the Document No. field. This is the source document on which the commission is calculated from.
- Show Application Document
  - This will show records associated with the Application Document No. field. This is the application document that is used to apply to the source document. This is typically a payment or a credit memo.

## Reports

Reports to print commission information are located in the Reports action group:

- 1) Commission by Order
  - a. This report displays the commissions for each order. Typically used if you pay your commission based on the Commission % defined on the salesperson card.
- 2) Commission by Item
  - a. This report displays the commissions for each line item. Typically used if you pay your commission based on the Commission % defined on the item, resource, etc.

## Case Example – Commission Calculated on Order

In this example, the sales commission is calculated based on the order.

The commission will be calculated based on the following example:

Invoice Amount = \$1,000

Salesperson Commission % = 5%

ItemA = \$300

ItemB = \$400

ItemC = \$100

Freight / Sales Taxes = \$200

If the customer pays \$600 for this invoice in November, the commission will be:

Application Percentage =  $\$600 / \$1,000 = 60\%$

ItemA =  $\$300 * 60\% * 5\% = \$9.00$

ItemB =  $\$400 * 60\% * 5\% = \$12.00$

ItemC =  $\$100 * 60\% * 5\% = \$3.00$

The total commission for the invoice for November would be \$24.00.

If the customer pays the remainder of the invoice in December, the calculation will follow the same format and the commission calculated will be for December based on 40% of the Commissionable %.

The commission calculated will be rounded to the nearest number.

## Case Example – Commission Calculated on Item

In this example, the sales commission is calculated based on the individual item commission %.

The commission will be calculated based on the following example:

Invoice Amount = \$1,000

ItemA = \$300 @ 1% commission

ItemB = \$400 @ 2% commission

ItemC = \$100 @ 5% commission

Freight / Sales Taxes = \$200



If the customer pays \$600 for this invoice in November, the commission will be:

Application Percentage =  $\$600 / \$1,000 = 60\%$

ItemA =  $\$300 * 60% * 1% = \$1.80$

ItemB =  $\$400 * 60% * 2% = \$3.60$

ItemC =  $\$100 * 60% * 5% = \$3.00$

The total commission for the invoice for November would be \$10.50.

If the customer pays the remainder of the invoice in December, the calculation will follow the same format and the commission calculated will be for December based on 40% of the Commissionable %.

The commission calculated will be rounded to the nearest number.

## Appendix – Fields Description

Here are the notable table fields and their purpose within the Salesperson Commission Worksheet table.

Customer No.	The Customer No. on the source document
Application Type	The application type to the source document. This is typically Payment or Credit Memo
Application Document No.	The application document number
Application Posting Date	The posting date of the application document
Application Amount	The application amount to the source document
Application Currency Code	The currency code that was used to apply to the source document
Salesperson Code	The salesperson code assign on the source document
Document Type	The document type of the source document. Typically an Invoice
Document No.	The source document no.
External Document No.	The external document no. that's assigned on the source document
Posting Date	Posting date of the source document
Due Date	Due date that's defined on the source document
Original Amount	The original amount of the source document
Salesperson Commission %	The salesperson commission % defined on the salesperson card
Currency Code	The currency code on the source document
Application Percentage	What percentage of the source document was applied using the Application Amount. This percent is used to calculate the basis for what is commissionable
Order Commission Basis	This is the basis for which the commission is to be calculated on. The commissionable lines types are defined in the Sales Commission Setup.
Adjusted Order Commission	The calculated order commission. The formula is the <b>Application Percentage * Order Commission Basis * Salesperson Commission %</b>
Adjusted Line Commission	The calculated commission based on the commission defined on the lines
Line Commissionable	The total commission calculated if the commission % is defined on the line level
Posted Commission Amount	The commission purchase document that's posted against the source document
Unposted Commission Amount	The commission purchase document that's created as a purchase order/invoice but has not been posted