

Custom Development: Designing, Collaborating, Implementing and Using xTuple Enhanced Commissions

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Thursday, October 10, 2013



Who is EMSEAL?

- ▶ Leading manufacturer of pre-compressed foam sealants and expansion joint systems
- ▶ Headquarters and metal/rubber plant in Westborough, MA
- ▶ Foam plant in Toronto, ON
- ▶ xTuple Standard – 28 users – went live on January 1, 2012



Commissions Requirements

- ▶ Multiple sales reps on orders
- ▶ Commissions split between reps
- ▶ Sales managers get commission on team members' sales
- ▶ Reps paid by vendor check or through payroll
- ▶ Reps assigned to customer as a whole or to individual ship-tos for the customer

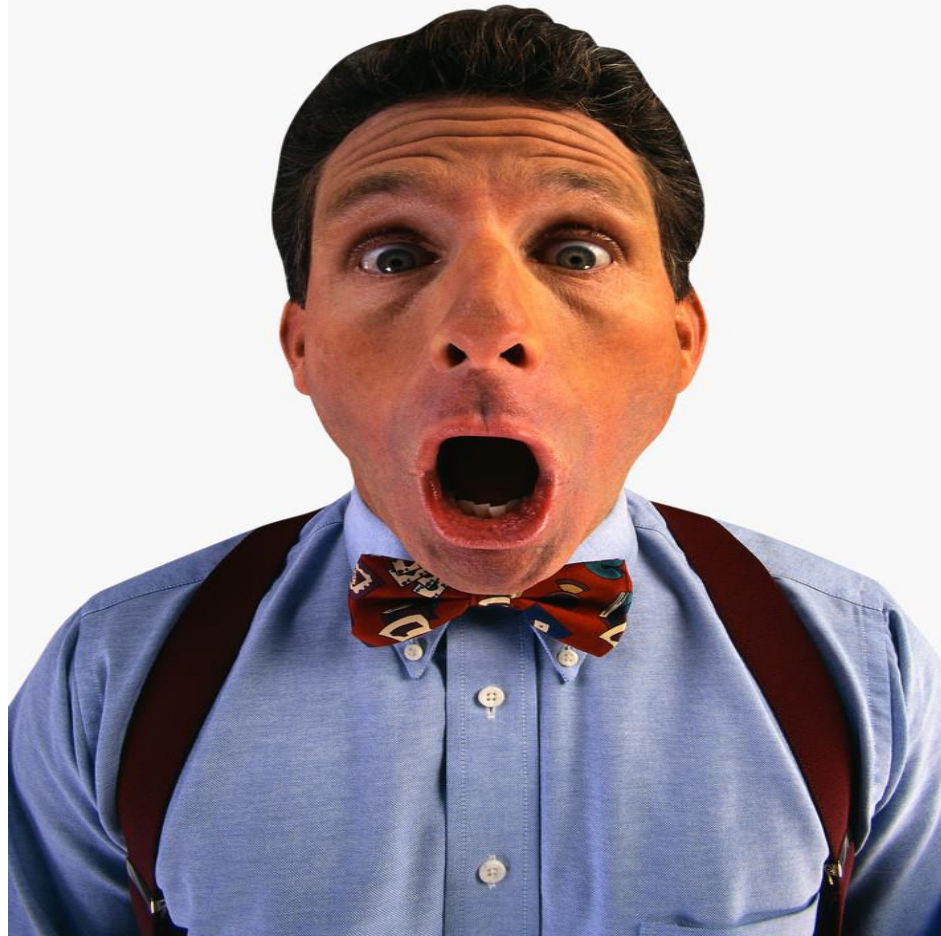


More Requirements

- ▶ Commission rates based on discount rate, item, product category, and/or customer
- ▶ Standard commission rates can be overridden
- ▶ Some products are not commissionable



You need to do what!?!?!?!?



WORLD'S #1 OPEN SOURCE ERP

www.xTuple.com

Custom Development Strategy

- ▶ Requirement: custom scripted commissions extension module meeting EMSEAL's needs
- ▶ Requirement: going-forward xTuple support
- ▶ Result: a design with more functionality than EMSEAL required and more flexibility to handle generic commission requirements of other xTuple customers



Design

- ▶ Designed with Mike Atherton on site 5/2011
- ▶ Initial specification included EMSEAL's requirements with some additional functionality helpful to the general customer
- ▶ Reviewed and finalized with BC Wilson and xTuple developers, making it workable for the full xTuple customer base
- ▶ Design time – about 8 weeks



Development and Testing

- ▶ Initial development – 10 weeks
- ▶ EMSEAL/xTuple testing & debugging – 8 weeks
- ▶ Kudos – Gary Hartnett, xTuple – incredible effort to resolve bug fixes during testing
- ▶ Final release was on time for our 1/1/12 go-live date



xtcommission Module Details

- ▶ 17 SQL functions
- ▶ 10 tables
- ▶ 6 triggers
- ▶ 17 screens
- ▶ 23 scripts
- ▶ 3 reports



Schedule & Assignment Setup

- ▶ Set percentage schedules for internal reps
- ▶ Discount-based schedules for third-party reps
- ▶ Assignments based on:
 - ▶ Customer or Customer Type
 - ▶ Sales Rep, with inclusion of sales management
 - ▶ Item or Product Category
 - ▶ Sales Rep Type
- ▶ Assignments can be exclusive



Schedule Example

- ▶ Third Party Rep, No Sales Hierarchy
- ▶ Flexible Rubber System
- ▶ Discount-Based Rate
 - ▶ 0% discount: 12%
 - ▶ .01-10% discount: 9%
 - ▶ 10.01-15% discount: 6%
 - ▶ >15% discount: 0%



Schedule Example

- ▶ Discount up to 0%: 12%
- ▶ Discount up to 10%: 9%
- ▶ Discount up to 15%: 6%
- ▶ Higher Discount: 0%

Commission Schedule

Schedule Name:

Description:

Commission Schedule Items

Discount Up To %	Commission Rate %
0.00	12.00
10.00	9.00
15.00	6.00
100.00	0.00

Schedule Assignment

- ▶ Sales Rep:
 - ▶ Southern Sealants (#04)
- ▶ Product Category:
 - ▶ ARCH-TFLX-NF
- ▶ Not Exclusive
- ▶ No Sales Hierarchy

Commission Schedule Assignment

Commission Schedule: Reps-12 Percent Max

Description: Maximum 12% commission based on discount

The schedule will apply only where ALL the assignment conditions are true

Assignment:

- Sales Rep: 04
- Ship-To
- Customer
- Item
- Customer Type
- Product Category: ARCH-TFLX-NF
- Sales Rep Group

Options:

- Exclude Other Schedules
- Include Sales Managers

Buttons: Save, Close

Sales Rep Setup

- ▶ Create accounts & expense categories
- ▶ Create sales rep records
- ▶ Create vendor records for reps paid by check
- ▶ Assign sales reps to customers or ship-tos
- ▶ Create sales rep group records for reporting



Sales Rep Setup

Sales Representative [?] [X]

Number: CRM Account... Save

Name: Active Cancel

Comm. Prct.:

Enhanced Commissions Groups

Expense Category: [Search]

803 - Commissions-Reps -
Account:

Use Commission Schedules

Receives Check

Order Entry

- ▶ Determine sales reps for the order – check assignments for ship-to first, then customer
- ▶ Check for reps' sales management hierarchy
- ▶ Determine commission schedule for each rep on each line based on order of precedence and exclusivity – multiple schedules may apply
- ▶ Create commission line on order line for each rep based on the schedule rate

Adjusting Commissions

- ▶ For each derived commission line, a user can:
 - ▶ Change the commission rate
 - ▶ Set an adjustment percentage to split a commission with another sales rep
 - ▶ Remove the commission line
 - ▶ Reset back to the derived values
- ▶ Changes can be applied globally to the order

Order Entry Commissions Edit

Sales Rep Commission [?] [X]

Sales Rep:

Default Override

Role: Rep Manager

Commission Split: Full Split

Commission Percent:

Split Adjustment Percent:

Commission:

[Save] [Close]

Ad Hoc Sales Rep Changes

- ▶ A user can add commissions for any number of sales reps to an order line to set up splits or award one-time commissions for assistance
- ▶ Commission rates will be derived based on schedules, but can be overridden
- ▶ Changes can be applied globally to the order
- ▶ Reps can be added to the customer or ship-to



Invoices

- ▶ At invoicing, all commission lines are copied from sales order to invoice
- ▶ No further changes allowed on sales order
- ▶ Further adjustments and ad hoc changes can be made from the Edit Invoice screen or Sales Rep Commission display



Sales Rep Commission Display

- ▶ “Nerve Center” of commissions processing
- ▶ Shows commissions linked to invoices
- ▶ View Options:
 - ▶ All – all commissionable items
 - ▶ Open – items related to open invoices (editable)
 - ▶ Closed/Unpaid – items related to closed invoices whose commissions have not been paid
 - ▶ Closed/Paid – items related to closed invoices whose commissions have been paid



Sales Rep Commission Display

- ▶ Right-Click Options:
 - ▶ View Sales Order
 - ▶ View/Edit Invoice
 - ▶ View/Edit Voucher (if Paid and sales rep is set to Receives Check)
 - ▶ View Commission
 - ▶ New/Edit/Remove Commission (if not Paid)
 - ▶ Pay Commission (if Closed/Unpaid)



Sales Rep Commission Display

Sales Rep Commissions

Close Print Preview Schedule Query

Parameters

Sales Rep: [Dropdown]

Start Date: 5/30/13 [Calendar]

End Date: 8/28/13 [Calendar]

Status: Show Closed/Unpaid Commissionable [Dropdown]

Select All

Pay Commissions

Commissions

Sales Rep	Name	Order No.	Invoice No.	Invoice Date	Invoice Status	Item	Qty	Commission	Total Comm.	Voucher	Paid	Comm Rate	Split Pct	Inv Paid Date
04				5/31/13	Closed		3.00	51.72	51.72		No	10.00	100.00	7/10/13
04				5/31/13	Closed		39.36	398.73	450.46		No	10.00	100.00	8/1/13
04				5/31/13	Closed		13.12	113.76	564.22		No	10.00	100.00	8/1/13
04				5/31/13	Closed		6.56	39.74	603.96		No	10.00	100.00	8/1/13
04				5/31/13	Closed		13.12	89.55	693.51		No	10.00	100.00	8/1/13
04				5/31/13	Closed		13.12	128.40	821.92		No	10.00	100.00	8/1/13
04				5/31/13	Closed		6.56	41.68	863.60		No	10.00	100.00	8/1/13
04				5/31/13	Closed		91.84	141.41	1,005.01		No	7.50	100.00	8/1/13
04				5/31/13	Closed		13.12	34.28	1,039.29		No	7.50	100.00	8/1/13
04				5/31/13	Closed		26.24	40.40	1,079.69		No	7.50	100.00	8/1/13
04				5/31/13	Closed		26.24	115.29	1,194.98		No	7.50	100.00	8/1/13
04				6/3/13	Closed		13.00	330.04	1,525.02		No	10.00	100.00	7/16/13
04				6/7/13	Closed		1.00	65.13	1,590.16		No	12.50	100.00	7/11/13
04				6/10/13	Closed		131.20	251.60	1,841.76		No	10.00	100.00	7/17/13
04				6/10/13	Closed		124.64	645.74	2,487.50		No	10.00	100.00	7/17/13
04				6/12/13	Closed		3.00	21.97	2,509.47		No	10.00	25.00	8/1/13
04				6/12/13	Closed		3.00	17.43	2,526.89		No	10.00	25.00	8/1/13
04				6/17/13	Closed		31.00	787.02	3,313.91		No	10.00	100.00	7/12/13
04				6/17/13	Closed		6.00	517.13	3,831.04		No	10.00	100.00	8/1/13
04				6/19/13	Closed		430.00	1,557.68	5,388.72		No	11.50	100.00	7/22/13
04				6/19/13	Closed		10.00	165.00	5,553.72		No	10.00	100.00	7/22/13
04				6/14/13	Closed		131.20	272.78	5,826.50		No	10.00	100.00	7/12/13
04				6/21/13	Closed		1.00	25.78	5,852.28		No	10.00	100.00	8/1/13
04				6/21/13	Closed		8.00	272.38	6,124.66		No	10.00	100.00	8/1/13
04				6/21/13	Closed		13.12	13.47	6,138.13		No	5.00	100.00	7/29/13
04				6/26/13	Closed		7.00	288.45	6,426.58		No	10.00	100.00	7/29/13
04				6/26/13	Closed		13.12	107.89	6,534.47		No	11.00	100.00	7/1/13
04				6/26/13	Closed		42.00	13.27	6,547.74		No	10.00	100.00	7/1/13



Paying Commissions

- ▶ Select set of Closed/Unpaid entries on Sales Rep Commission display
- ▶ Pay Commissions button pays selected entries
- ▶ Creates Miscellaneous A/P Vouchers for sales reps who receive checks through xTuple
- ▶ Marks commission entry as paid for sales reps paid through payroll

Commissions Statement

- ▶ Generated from Sales Rep Commission display
- ▶ Skeleton provided for user to customize



Summing Up

- ▶ Enhanced Commissions provides:
 - ▶ Freedom to customize the setup of a default commissions structure
 - ▶ Incredible commissions flexibility at the line item level on sales orders and invoices
 - ▶ Ability to add any number of sales reps to an order or to line items within the order
 - ▶ Ability to split commissions between sales reps



**Frankly, it's everything you
could ever want in a
commissions system!!!**



Q & A

What did I miss?

What do you think?

Should we all just stop paying commissions?

Thanks for coming!!!



Contact

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