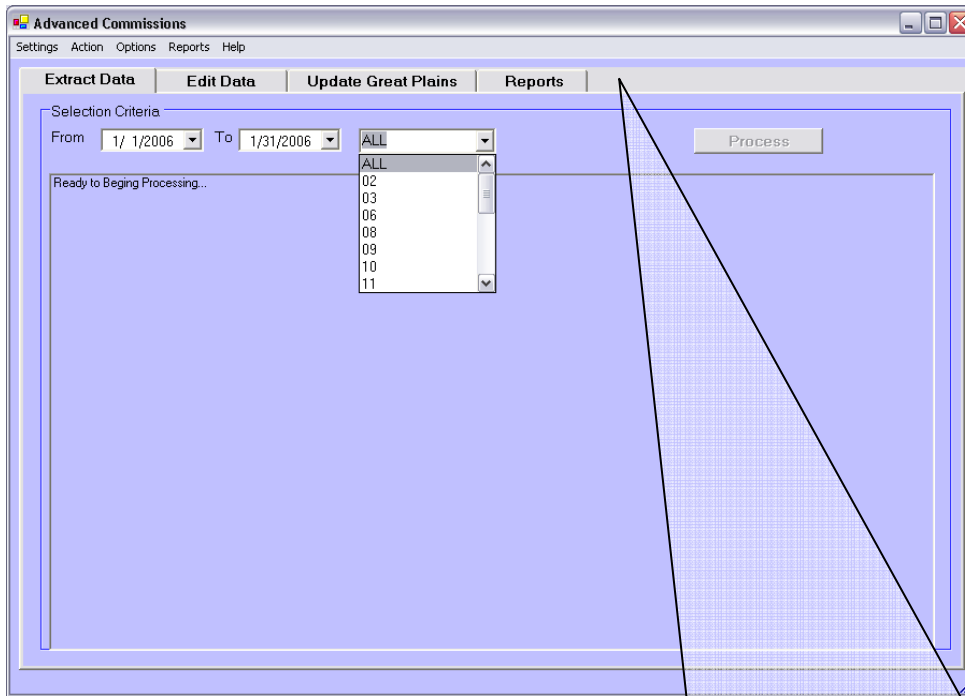


# Advanced Commissions for MAX and Great Plains

## **Advanced Commissions Module:**

The purpose of the Advanced Commissions module is to provide a comprehensive solution for managing sales representative commissions. Advanced Commissions creates a bridge between MAX and Great Plains allowing you to extract and edit data, calculate commissions, run reports and automatically load transactions into Great Plains. Using the Advanced Commissions Module to manage your sales rep commissions will increase productivity, accuracy, enhance reporting and provide historical data. Let's take a look at how it works.

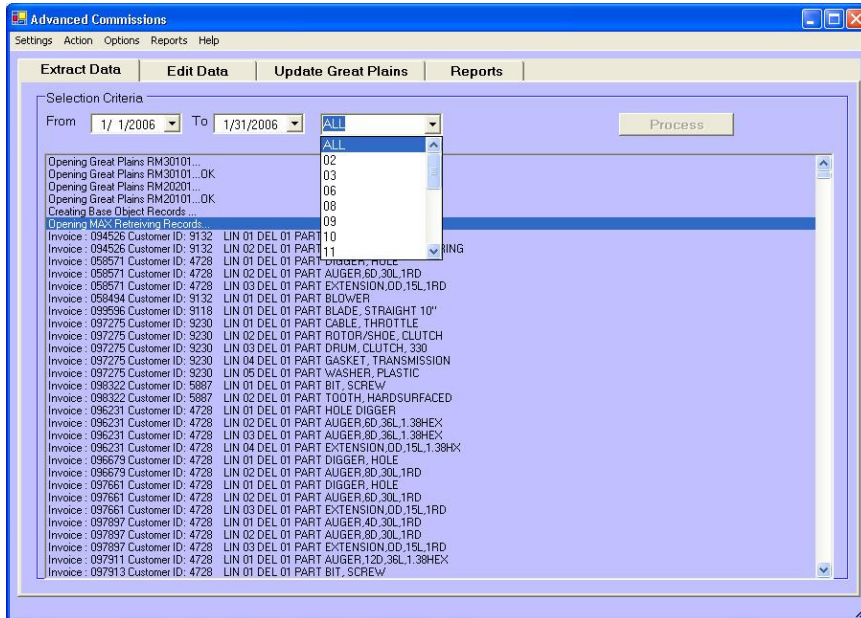


## **Advanced Commissions Work Flow Overview:**

1. Extract Data from Great Plains and Max for a given time frame.
  - Select the duration – Weekly, Month, Quarter, etc.
  - Choose a specific rep to process or ALL reps
2. Edit the Extracted Data – (details on next page)
  - View Invoices headers, details and Great Plains Payments
  - Manage and edit specific values such as splitting commissions between Sales reps at invoice detail line level, change rates, and more.
3. Updating Great Plains
  - Perform Commission Calculations
  - Run Edit List Reports and Preview Reports for Sales Reps
  - Automatically Load Great Plains Transactions:
    - Create Batch, Invoice Vouchers, Distributions, etc
4. Reporting
  - Run Final Reports to give to Sales Reps
  - Run Historical Reports
  - Include Detail Lines or Summary, Graphs
  - Create Custom Reports against historical data.

# Advanced Commissions for MAX and Great Plains

## Step 1 - The Extract Process



### Select the Date Range

Here you have maximum flexibility for determining the time interval for processing sales reps commissions. Whether you pay commissions once a week, bi-monthly, per month, quarterly or yearly; simply select a start and end date.

### Select Individual Sales Rep or ALL

You can process a single rep or have the manage all sales reps in one bulk extract

### Extract Process

After the setting the selection criteria you start the extract by clicking on the <Process> button.

The Advanced Commissions Module will start by reviewing invoices to customers that have been paid in full within Great Plains History for the specified date ranges. An optional feature is available to also include partial payments.

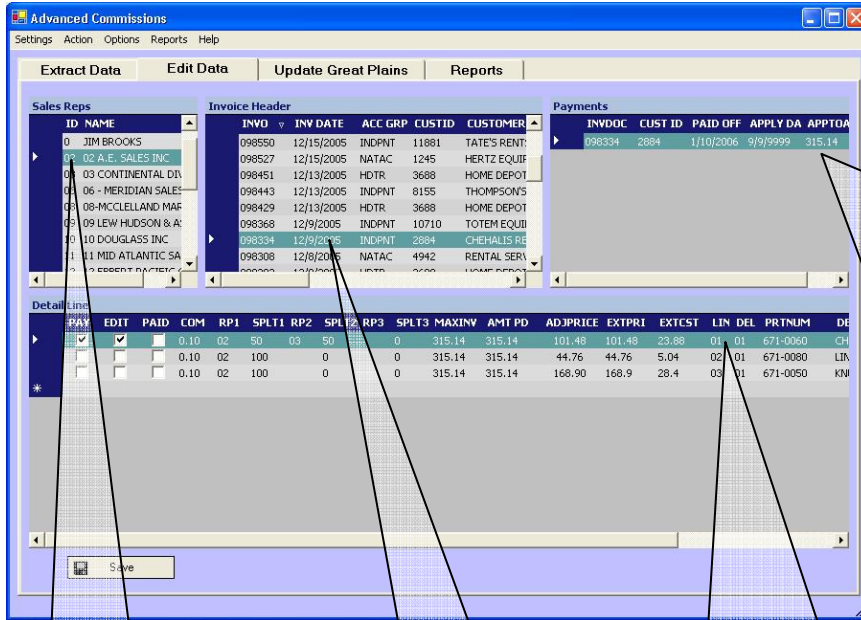
After reading all the payment information from Great Plains the module then goes out to MAX and retrieves all the invoice, customer, part master and sales rep data for each posted invoice. During this process it automatically creates a relational data base and performs various calculations.

If you choose to include partial payments as an option you can also select specific terms codes to exclude. For example suppose you have customers that are on a payment plan. You might want to include those for a given months commission payment to your sales rep. On the other hand, If the customer has for what ever reason, not paid the invoice in full, and the sales rep should only receive a commission when full payment has been received, you can exclude it.

Once the extract is complete the next step is to view the data and if necessary edit values.

# Advanced Commissions for MAX and Great Plains

## Step 2 – Manage, View and Edit Commission Data



### Great Plains Payment Info

For each selected invoice this view shows the payment information in Great Plains.

If partial payments option is active it will show applied date and amount.

Multiple partial payments are handled as well

### Easily Navigate By Rep

Scroll thru sales reps.

As you select a rep, invoice header, detail lines and Great Plains payment information changes immediately.

All the data is read only yet the detail line view does allow certain fields to be edited.

### Invoice Headers

This view includes a select group of relevant fields from the MAX invoice master table.

As you scroll thru this view the invoice details and payment views change accordingly.

### Invoice Details

Here is where you can manage and edit data that will effectively provide more control for commission payments to your sales reps. A wide selection of fields is available on each line

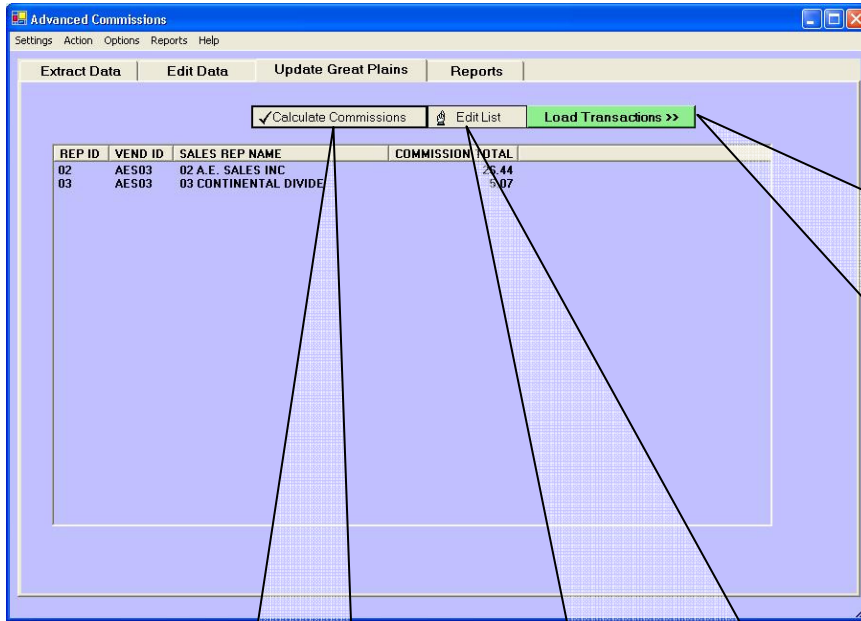
First you can choose to automatically set or undo the Pay Flag for the entire data set from the action menu or do it manually. This data is fresh out of MAX so if you choose to edit values it will be marked as edited. You can only edit certain fields, the rest are read only. By editing certain fields is how you gain rich manageability over the commission payment process.

The image above shows just one of the many MAX ways to edit the data...Here we split the commission on an invoice to another rep for just one line item. You can adjust the commission rate, splits, add or delete reps, adjust the extended price, etc; *all at the detail line level!*

It is important to point out that payments and calculations do not include freight, late payment charges, etc...only line totals. Also if partial payments are enabled the program will self manage amounts that are less than the line totals and distribute the adjustments accordingly across the invoice. It will never allow payment above the line item total. Multiple partial payments and credits are handled too. Remember you can always edit the data to achieve a desired result.

# Advanced Commissions for MAX and Great Plains

## Step 3 – Calculating Commissions



### 3. Great Plains Transactions

After reviewing the edit list report, click here to automatically load transactions into Great Plains.

You can also run an included report for your Sales Reps Prior to loading the GP transactions (next Page)

### 1. Commission Rollup

Click <Calculate Commissions>

It's that simple!

Advanced Commissions will now process all the data and calculate a grand total for each sales rep.

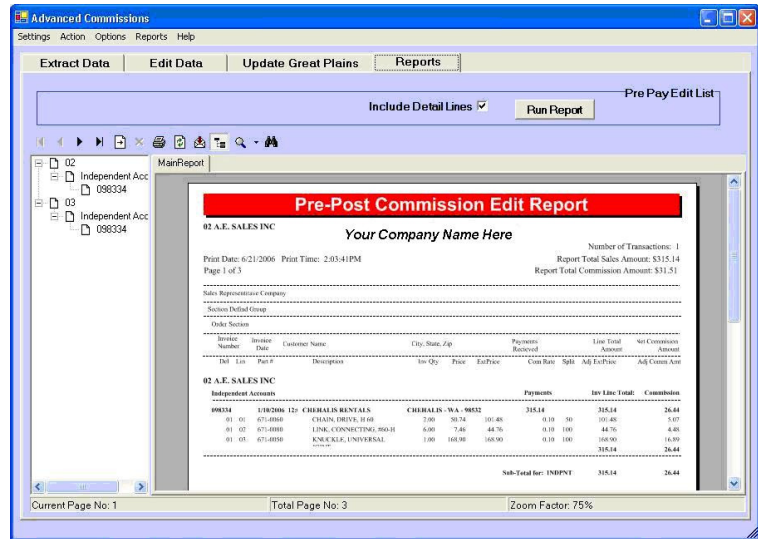
It will build a series of objects for each sales rep that will be used to load transactions to Great Plains

Here we see a roll up for just our one invoice where we split the commission with another rep for just one line item.

Remember you can process one sales rep or all reps and you can edit the data at the line item level.

It will process all sales reps quickly even if you have thousands of invoices flagged.

### 2. Quick link to Edit List Report

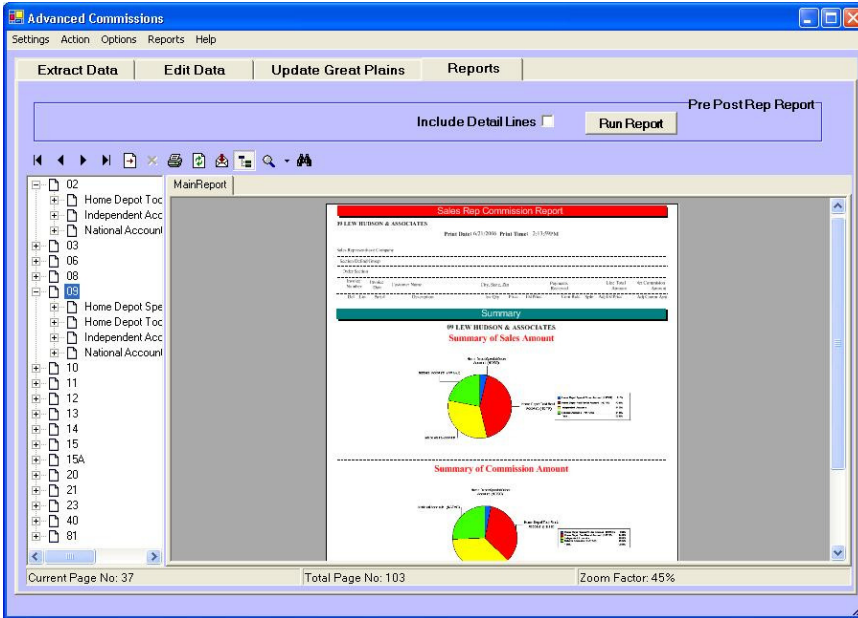


Prior to loading transactions into Great Plains print out the edit list report. This report can include or exclude invoice detail lines. Like all reports within the Advanced Commissions Module you can easily export to Excel, a PDF, etc.

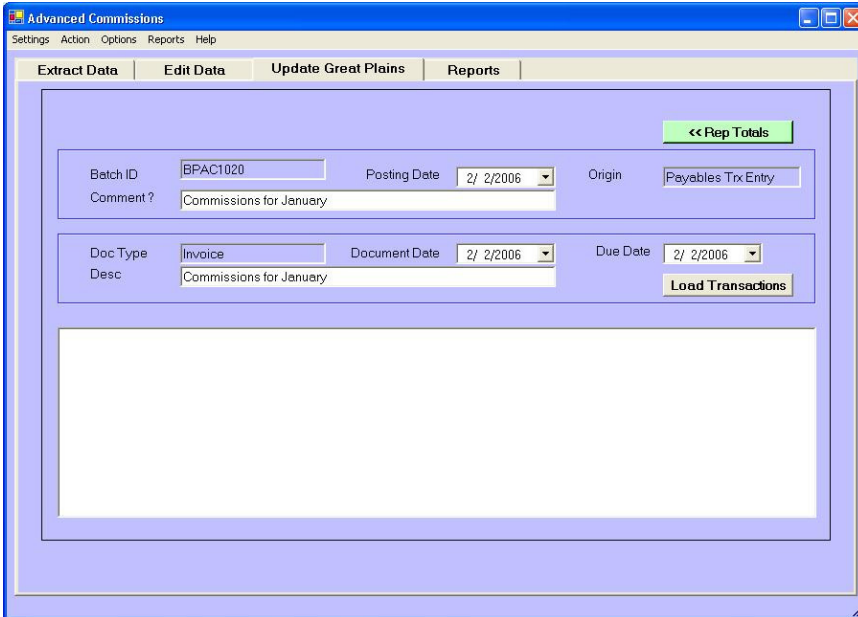
This report is included and can be edited using Crystal Reports.

# Advanced Commissions for MAX and Great Plains

## Step 4 – Preview Sales Rep Reports (Prior to loading transactions into Great Plains)

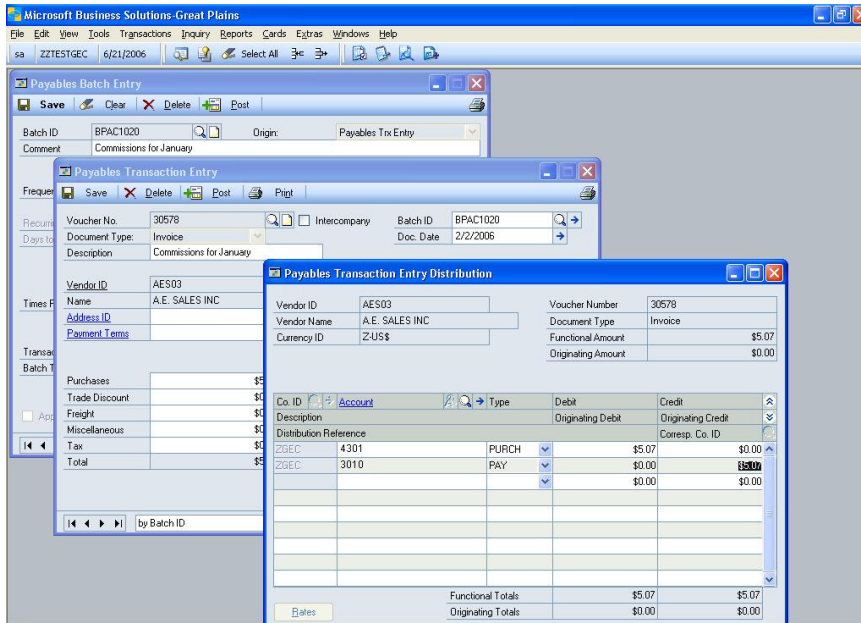


## Step 5 – Load Transactions into Great Plains (Automatically create Batch, Invoice Vouchers, Distributions, etc)



# Advanced Commissions for MAX and Great Plains

## Step 6 – Open Great Plains, Review, Post and Print Checks



### Advanced Commissions loads all transactions automatically!

Here again is our example of the rep that was added as a split on our first detail line.

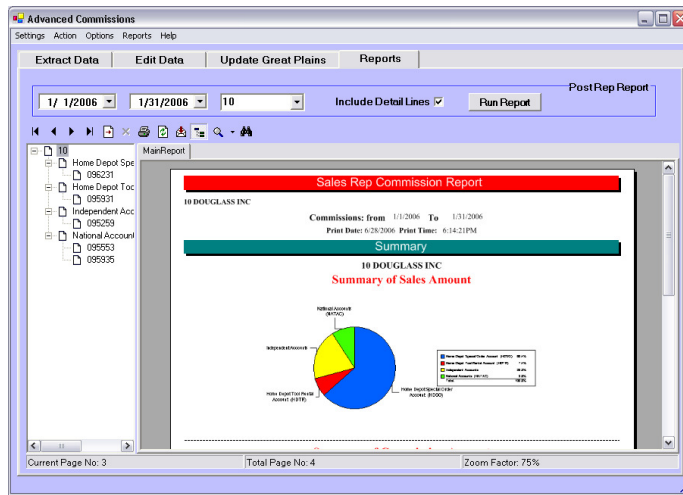
If we had processed 30 reps the batch would have 30 documents, one for each Sales Rep.

Note: All sales reps need to also be set up in Great Plains as vendors.

From here proceed as usual to post and print commissions checks.

## Step 7 – After Advanced Commissions loads transactions into Great Plains

Once the transactions are loaded into Great Plains, the Advanced Commissions Module moves the records to a history table within its database. You can then run a final report for each or all sales reps over any time frame. For example the month you just processed, last month, over last quarter, last year, year to date, etc. This is useful when resolving inquiries from your sales reps.



Contact your MAX Exact account manager to schedule a live demo.

# Advanced Commissions for MAX and Great Plains