

# Express365 Accounting Tiered Commission Report Guideline

November 2019

Latest Update: 10<sup>th</sup> Dec 2019



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## 1. Pre-requisite

Express 365 (E365) cloud accounting strives to give you the best accounting experience; users are able to view on Tiered Commission Report via different report format.

Before proceed to Tiered Commission Report, user need to complete several step as below.

### a) Setup Salesperson

First, user needs to create a new salesperson by click on “New Salesperson” which is under the Setting module.

#### Salespersons

- User is able to select multiple Locations for each salesperson.
- User is able to select Upper Line for each salesperson.

The screenshot displays the 'Salespersons' module in the Express 365 system. At the top, there is a navigation bar with tabs: Dashboard, Sales, Purchases, Banking, Stock, General Ledger, Tax, and Settings. Below this, the 'Salespersons' section is active, showing a table of existing salespersons and a form to create a new one. A red box highlights the form fields.

| Code    | Description                    |   |
|---------|--------------------------------|---|
| Andy    | Person in charge in HQ         | × |
| Joyce   | Sales person based in branch 1 | × |
| Jude    | Person in charge in branch 1   | × |
| Kris    | Sales person based in HQ       | × |
| SP      | Salesperson                    | × |
| Support | Support                        | × |

**Code\*** Andy

**Description** Person in charge in HQ

**Location** Hq

Note: You can select **multiple locations** for each salesperson. Clear the Location will make the salesperson appear in all location. (Click the option to select/unselect)

**Upper Line** Kris

**Package**

☐ Set to inactive

**Link User ID**  
Link User ID to identify the user of this salesperson. User ID that linked is allow to view transaction for this salesperson only.

**User ID**

Print listing New Salesperson Save

## b) Create Cash Sales/Sales Invoice/Received Payment.

After finish setup salesperson, users may proceed to create a Cash Sales / Sales Invoice/Received Payment involve salesperson's commission then select salesperson as per below.

**Cash Sales**

Customer: C0015 CBC Sdn Bhd Transfer Document From:  **Transfer**

Address: Taman Teknologi Puchong Puchong 47000 Selangor Malaysia

Contact: Jessie +60127851531

Deposit To: 3010/020 Current account 1

Currency: MYR 1 **Get rate**

Date: 04/11/2019 Ref. No.: Auto-generated

Payment Method: EFT Tags: Malaysia

Cheque No.:

Location: Hq Salesperson: **Kris**

Remark:

Apply Margin Scheme ☐

Apply Flat Rate Scheme ☐

Enter Barcode: Click on the button next to the price to view Item Info. ☐ Discount by %

| Item Code*  | Description | Image | Quantity | UOM  | Unit Price | Discount | Tax Code | %    | Tag | Amount (RM)* |
|-------------|-------------|-------|----------|------|------------|----------|----------|------|-----|--------------|
| Acer AS 100 | Acer AS 100 |       | 150.000  | unit | 5,000.000  | \$       |          | 0.00 |     | 750,000.00 X |

**Add line**

**Subtotal** 750,000.00

**Grand Total RM** 750,000.00

**Actions** **Print / Email** **Copy to New** **New** **Save** **Go to list** [Journal Entry](#)

## 2. Tiered Commission Report Setting

**Note:** Please inform our support team if you would like to add-on this feature.

In this screen, there are 2 type of commission setting which are **Direct Commission Setting** and **Downline Contribution Setting**. These two setting allow user to set the rules for commission and bonus entitled by a sales person or payment received.

### a) Direct Commission Setting

Commission can be set by percentage or by amount according to range of sales amount or payment received.

Bonus can be set (price target) according to range of sales amount or payment received.

**Tiered Commission Report**

Report Format\* Listing Doc. Date Custom From\* 16/03/2012 To\* 07/10/2019 Retrieve

Based on\* Sales Amount Salesperson\* ALL ☐ Include Tax Amount for Commission ☐ Include Discount Amount for Commission

**Settings**

**Direct Commission Settings**

Please determine the rules for commission and bonus entitled by sales person

Commission Level ☐ Accumulated

| Amount From | Amount To | By            | Value | Package |
|-------------|-----------|---------------|-------|---------|
| 100.00      | 99,999.00 | By Percentage | 10.00 |         |
|             |           | (None)        |       |         |
|             |           | By Percentage |       |         |
|             |           | By Amount     |       |         |

Add line

**Downline Contribution Settings**

Bonus Level

| Amount   | Within (day) | By        | Value | Package |
|----------|--------------|-----------|-------|---------|
| 1,000.00 | 30           | By Amount | 88.00 |         |

Add line

Save

## b) Downline Contribution Setting

In this setting, commissions can calculation up to 2 tiers. Users are able to set the rules for commission and bonus entitled by a sales person, which contributed from their downline.

(1 level only)

### Tiered Commission Report

Report Format\* Listing Doc. Date Custom From\* 16/03/2012 To\* 07/10/2019 Retrieve

Based on\* Sales Amount Salesperson\* ALL ☐ Include Tax Amount for Commission ☐ Include Discount Amount for Commission

**Direct Commission Settings**

Please determine the rules for commission and bonus entitled by sales person

Commission Level ☐ Accumulated

| Amount From | Amount To | By        | Value | Package |
|-------------|-----------|-----------|-------|---------|
| 500.00      | 5,000.00  | By Amount | 99.00 | ✖       |

Add line

**Downline Contribution Settings**

Bonus Level

| Amount | Within (day) | By            | Value | Package |
|--------|--------------|---------------|-------|---------|
| 500.00 | 800          | By Percentage | 23.00 | ✖       |

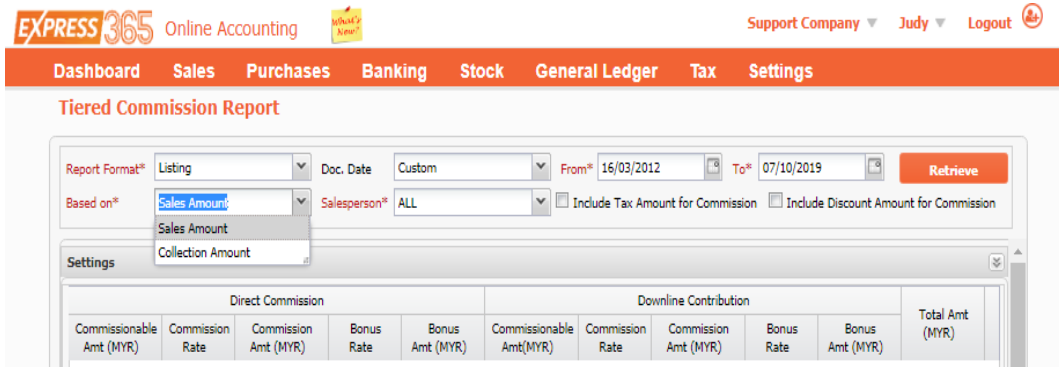
Add line

Save

### 3. Generate Tiered Commission Report

#### a) Commission base on Sales Amount/Collection Amount

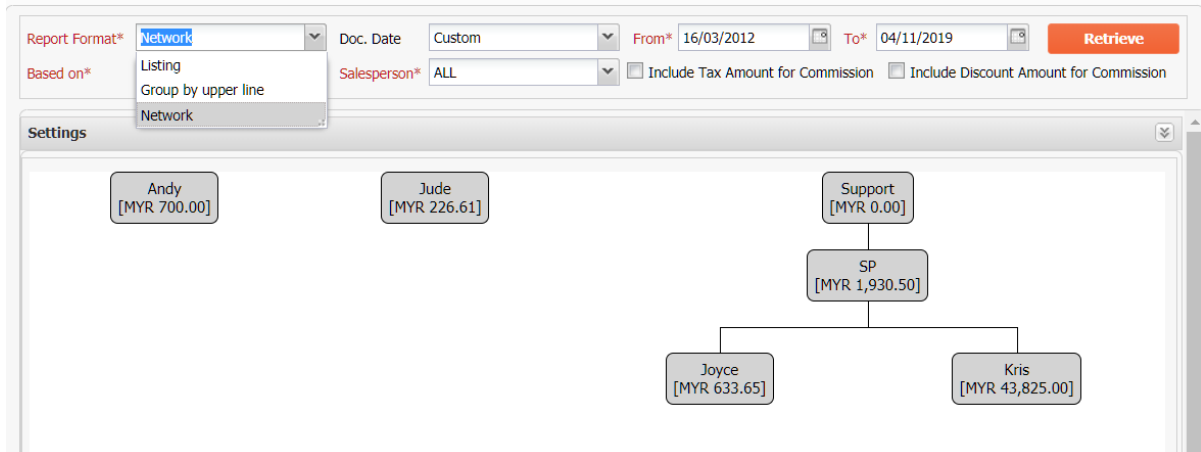
Base on the screen below, users are able to view commission/bonus base on Sales Amount or Collection Amount in the Tiered Commission Report (under the Sales module).



#### b) Report Format: Network

In this option which allow users to view the Tiered Commission Report in the network format.

##### Tiered Commission Report





### c) Report Format: Group by Upper Line

In this option which allow users to view the Tiered Commission Report in the group by upper line format.

**Tiered Commission Report**

Report Format\*
Group by upper line
Doc. Date
Custom
From\*
16/03/2012
To\*
04/11/2019
Retrieve

Based on\*
Sales Amount
Salesperson\*
ALL
☐ Include Tax Amount for Commission
☐ Include Discount Amount for Commission

Settings

| Sales Person | Total Amount(MYR) |
|--------------|-------------------|
| Andy         | 700.00            |
| Jude         | 226.61            |
| Support      | 0.00              |
| SP           | 1,930.50          |
| Joyce        | 633.65            |
| Kris         | 43,825.00         |

### d) Report Format: Listing

In this option which allow users to view the Tiered Commission Report in the listing format.

Tiered Commission Report

Report Format\*

Listing

Doc. Date

Custom

From\*

16/03/2012

To\*

04/11/2019

Retrieve

Based on\*

Sales Amount

Salesperson\*

ALL

☐ Include Tax Amount for Commission

☐ Include Discount Amount for Commission

Settings

| Direct Commission                         |                 |                      |            |                 | Downline Contribution    |                 |                      |            |                 | Total Amt (MYR) |
|---|-----------------|----------------------|------------|-----------------|--------------------------|-----------------|----------------------|------------|-----------------|-----------------|
| Commissionable Amt (MYR)                  | Commission Rate | Commission Amt (MYR) | Bonus Rate | Bonus Amt (MYR) | Commissionable Amt (MYR) | Commission Rate | Commission Amt (MYR) | Bonus Rate | Bonus Amt (MYR) |                 |
| Andy                                      |                 |                      |            |                 |                          |                 |                      |            |                 |                 |
| 14,000.00<br><small>(14,000.00)</small>   | 5.00%           | 700.00               | 0.00       | 0.00            | 0.00                     | 0.00            | 0.00                 | 0.00       | 0.00            | 700.00          |
| Joyce                                     |                 |                      |            |                 |                          |                 |                      |            |                 |                 |
| 12,673.00<br><small>(12,673.00)</small>   | 5.00%           | 633.65               | 0.00       | 0.00            | 0.00                     | 0.00            | 0.00                 | 0.00       | 0.00            | 633.65          |
| Jude                                      |                 |                      |            |                 |                          |                 |                      |            |                 |                 |
| 228.90<br><small>(228.90)</small>         | 99.00%          | 226.61               | 0.00       | 0.00            | 0.00                     | 0.00            | 0.00                 | 0.00       | 0.00            | 226.61          |
| Kris                                      |                 |                      |            |                 |                          |                 |                      |            |                 |                 |
| 876,500.00<br><small>(876,500.00)</small> | 5.00%           | 43,825.00            | 0.00       | 0.00            | 0.00                     | 0.00            | 0.00                 | 0.00       | 0.00            | 43,825.00       |
| SP  |                 |                      |            |                 |                          |                 |                      |            |                 |                 |
| 1,950.00<br><small>(1,950.00)</small>     | 99.00%          | 1,930.50             | 0.00       | 0.00            | 889,173.00               | 0.00            | 0.00                 | 0.00       | 0.00            | 1,930.50        |