

Express365 Accounting Tiered Commission Report Guideline

November 2019

Latest Update: 10th 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' management interface. At the top, there is a navigation bar with tabs for 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 for creating a new one.

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

The form for creating a new salesperson is highlighted with a red box and includes the following fields:

- Code***: Text input field containing 'Andy'.
- Description**: Text input field containing 'Person in charge in HQ'.
- Location**: Dropdown menu with 'Hq' selected. A note below states: '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**: Dropdown menu with 'Kris' selected.
- Package**: Text input field.
- Set to inactive
- Link User ID**: Section with a note: '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**: Dropdown menu.

At the bottom of the page, there are three buttons: 'Print listing', 'New Salesperson', and '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

Address: Taman Teknologi Puchong, Puchong 47000 Selangor, Malaysia

Contact: Jessie +60127851531

Deposit To: 3010/020 Current account 1

Currency: MYR 1

Date: 04/11/2019

Payment Method: EFT

Location: Hq

Ref. No.: Auto-generated

Tags: Malaysia

Salesperson: **Kris**

Remark:

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

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	

Downline Contribution Settings

Bonus Level

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

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

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
500.00	5,000.00	By Amount	99.00	X

Add line

Downline Contribution Settings

Bonus Level

Amount	Within (day)	By	Value	Package
500.00	800	By Percentage	23.00	X

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).

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: Collection Amount

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)	

b) Report Format: Network

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

Tiered Commission Report

Report Format*: Network Doc. Date: Custom From*: 16/03/2012 To*: 04/11/2019 Retrieve

Based on*: Listing Salesperson*: ALL Include Tax Amount for Commission Include Discount Amount for Commission

Settings: Network

```

graph TD
    Support[Support [MYR 0.00]] --- SP[SP [MYR 1,930.50]]
    SP --- Joyce[Joyce [MYR 633.65]]
    SP --- Kris[Kris [MYR 43,825.00]]
    Andy[Andy [MYR 700.00]]
    Jude[Jude [MYR 226.61]]
  
```

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 <small>(14000.00)</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 <small>(12673.00)</small>	5.00%	633.65	0.00	0.00	0.00	0.00	0.00	0.00	0.00	633.65
-										
Jude										
228.90 <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 <small>(876500.00)</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 <small>(1950.00)</small>	99.00%	1,930.50	0.00	0.00	889,173.00	0.00	0.00	0.00	0.00	1,930.50
-										