**ARC ID: 6547 – Sales Analysis and Commission Dashboard**

Robert Cole, December 2021

For: ACERO Precision

Contact(s): Shirley O'Connell [SOConnell@aceroprecision.com](mailto:SOConnell@aceroprecision.com)

**Business Case:**

ACERO has multiple factors that go into deciding commission rates on Sales Orders and needed an easier way to set those rates and calculate commission payout for a date range. Previously, they were modifying a series of Excel workbooks and manually updating the date range in the SQL connection that was pulling the data. They were then creating a matrix in the workbook to determine the commission payout and had an individual workbook for each entity that received commission. This ARC project gives them the ability to record all their commission factors in custom tables and then provides a dashboard that allows them to select a date range, modify the sales data as required, calculate the commission payout for the date range, and export all required reporting.

**Project Components:**

The project consists of 3 custom tables and two custom menu items.

The custom tables are as follows:

* GCG\_6547\_COMM\_BI
  + This table holds the data that is modified during the user’s session in the dashboard. This table also informs the custom Crystal Report.
* GCG\_6547\_COMMISSION\_RATES
  + This data holds all the factors that combine to form the commission rate.
* GCG\_6547\_USER\_FIELDS
  + This data holds all the custom user fields that are used and links them back to their base ID in GSS.

The custom screens / menu items are as follows:

* Commission Rate and User Field Maintenance
  + This is accessed through Accounts Payable > Administration > Commission Rate Maintenance and maintains all the commission rate factors and custom user fields that ACERO uses to determine the rates.
* Sales Analysis and Commissions Dashboard
  + This is accessed through Accounts Payable > View > Sales Analysis and Commission Dashboard and is the main screen that will be used to perform all required calculations and populate all reporting requested by the customer.

**Project Step-by-step:**

The maintenance screen is used to populate the custom tables with all related information required to build the commission rates for the payout calculations.

Graphical user interface, table

Description automatically generated

The rate is a combination of the Customer on the Sales Order, USER\_1 on the Sales Order Header, and USER\_4 on the Sales Order Header.

Graphical user interface, text, application, email

Description automatically generated

Since the USER\_1 and USER\_4 fields are manual entry, another maintenance screen was created to validate these values and link them back to their GSS ID in the system. USER\_1 is completely custom and does not have a base ID.

Table

Description automatically generated

USER\_4 can be split into two separate categories. The first is the Distributor which is linked back to the Vendor Number in GSS.

Graphical user interface, table

Description automatically generated

The second is the Sales Rep which can be linked back to an Employee ID number in GSS.

The dashboard is used to analyze the sales data for a given date range, manipulate the data as required, and provide reporting on the commissions that are to be paid out.

Graphical user interface, text, application, email

Description automatically generated

The user can set a date range for the data that needs to be reviewed as well as a USER\_4 filter listed as Salespersons (Salespersons is not actually utilized in their system). The USER\_4 is grouped by the ID linked back to GSS and has grouped totals added.

Graphical user interface, application, table

Description automatically generated

The user can tab between the two categories of commission that they have (Distributors and Salespersons).

Graphical user interface, text, application, email

Description automatically generated

The user can go through the data and make changes as required. In this case there was the wrong value entered in USER\_4 so we are changing it to the correct value.

Graphical user interface, application

Description automatically generated

This will move the line from the previous bucket to the new correct bucket automatically and calculate everything accordingly.

Graphical user interface, application

Description automatically generated

The user can also duplicate a line by pressing the “ADD” button at the end of the grid. This will present the user with a dialogue and a drop down where they can select the value that they want to duplicate the line for.

Graphical user interface

Description automatically generated with medium confidence

This drop-down list will list all available USER\_4 values entered in the maintenance screen. Once the user selects the appropriate value and clicks “OK” it will duplicate the selected line and automatically add it to the correct bucket and recalculate.

The user can also click the “DEL” button to remove a line from the dashboard completely. This is for instances where a line may not be correct and does not actually get commission paid out.

Once all the data is verified, the user can then export all the data to an excel file or print the data to a custom Crystal Report.

Graphical user interface, application, Word

Description automatically generated

The data can also be saved between sessions should the user need to close out of the dashboard for whatever reason and will resume with whatever data they have altered during the session. Where there is an existing session for the user, they will be prompted on whether they want to continue the previous session or start a new one.

Graphical user interface, application

Description automatically generated

If “Yes” is selected it will load the data from the previous run, otherwise the dashboard will delete the previous run and reload a fresh data set based upon the user’s variables.