

ARC 6621: Sales Commission on Parts Based on 1st Ship Date

Dayton Rogers Manufacturing CO

Overview:

- Project script runs automatically when parts are set to ship from the “Shipments – New Window”. This can be accessed either through menu items *Shipping & Receiving > Transactions > Shipments > New* or *Shipping & Receiving > View > Shipping Dashboard*
 - Project automatically sets commission rates for the appropriate salesperson attached to the sales order for all parts that are being shipped.
 - Amount of 1% or 2% is determined by time elapsed since the first shipment date for each part.

Set Up Custom Table:

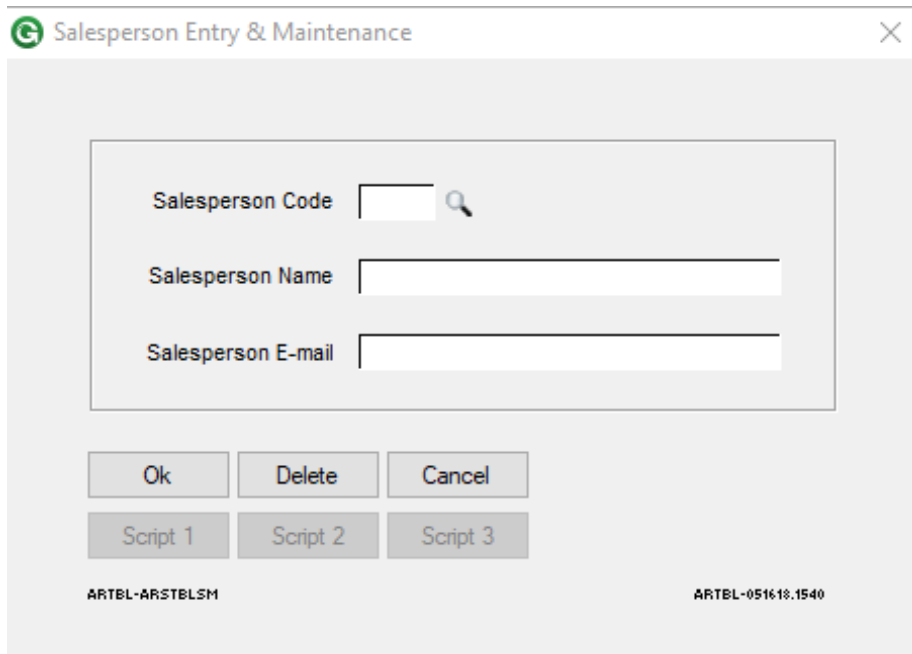
- Ensure this project is installed via the ARC to ensure custom table is created.
- Begin by uploading any shipment date data from legacy system using the provided excel template. File must be either xls or xlsx to work with the uploader.
 - File can be found in ...\\Global\\Docs\\GCG_6621_Data_Template

	A	B
1	Part	Ship Date
2	0025	10/5/2020
3	0020-40327	1/9/2019
4	210900	10/5/2020
5	0025	2/9/2021
6	05-5259	8/21/2021
7		
8		

- First row must contain headers “Part” and “Ship Date”
- Ensure that column formatting for part is set to “Text”. This is to ensure that leading zeroes on part numbers do not get dropped
- Do not include revision numbers in parts, (otherwise for the sake of this program, the ship date will not match what is entered during shipping).
- Date can be entered in a few ways
 - MM/DD/YYYY
 - MM-DD-YYYY
 - Month and day values can be entered with or without leading zeroes i.e. 1/9/2021 or 01/09/2021
 - **Full 4 digit year must be entered

Set Up Global Shop Commission:

- Sales people must be added to system via *System Support > Administration > Company Options (Standard) > Accounts Receivable Table Maintenance > Salesperson Entry*
 - According to Quote, there should be a sales person “HOUSE ACCOUNT” added. This is so any sales order with this “person” added will have the commission rate automatically set to 0%



Salesperson Entry & Maintenance

Salesperson Code 🔍

Salesperson Name

Salesperson E-mail

Ok Delete Cancel

Script 1 Script 2 Script 3

ARTEL-ARSTBLSM ARTEL-051618.1540

- Commission types must be set up via *Accounts Receivable > File > Maintain Commission Rates*

Salesperson Commission Rates

Sales Rep Name Product Line Type Commission Rate

Alternate Rep Name Commission Rate

Alternate Rep Name	Commission Rate

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- The 2 rates that should be entered for each rep should be 1% and 2% (as script looks for appropriate commission type according to these values). That would be entered as 0.01000 and 0.02000, respectively
- ***A commission rate of 0.00 should be set for the HOUSE ACCOUNT salesperson with a blank type.

Logic Explanation:

- The logic to look up the commission type for the salesperson shall be done by looking up the commission type assigned for the percentage determined in the logic above. Example: SP1 sells a part and gets a 1% commission, so the script will return the commission type (whatever it is called) for that salesperson where 1% is the rate set for the salesperson in Accounts Receivable > File > Maintain Commission Rates. The code will look specifically for the percentage to return the type code
- After the user clicks Save but before the shipment actually saves, the script shall read in only order lines on the shipment that had qty added in the Shipped Qty column.
- The script shall look up the salesperson on the order. If the **salesperson is equal to HOUSE ACCOUNT, the script shall clear the order line's commission type so that 0% is applied.**
 - In the event that a sales order is attempting to be shipped with no sales person set, the script will treat the order as HOUSE ACCOUNT and "skip" the line that is set to ship i.e. no commission will be set for that line.
- If the salesperson is **not equal to HOUSE ACCOUNT**, the script shall also **determine each part's first shipment date by first looking at the custom table. If it is not found, it will look at order history to determine the first ship date. If none is found, the current date will be considered the first shipment date.** It shall then apply the following business rules for assigning commission rates:
 - If the **ship date is less than or equal to one year after the first ship date**, the script shall write the commission type denoting the **2% commission rate**.

- Else, the script shall write the commission type denoting the **1% commission rate**.
- *Note: when doing a lookup on part, the rev must be dropped. Dayton Rogers uses revision control on their parts, but a new revision does not equal a new part in this case.*

Shipments - New

☐ Ship All Lines
 Customer ShipTo ID Packing List No Cartons Gross Weight Ship Date Bill of Lading Number 3rd Party Freight

Carrier Service Type Carrier Account Transport Method Ship Via ETA Date Tracking Number

Bill To Address **ShipTo Address** ☐ Non US

DIAMOND DAVE'S LTD.
 777 HEAVEN
 P.O. BOX 777
 ODELL, TX 77777777
 USA
 DAVID ALAN O'DELL SR.
 Contact Name Contact Phone Ext
 Email
 Customer PO Facility Code ☐ Residential

☒ Print Packing List ☐ Auto Select for Invoicing
☐ Show Bill of Lading Screen ☐ Insurance
☐ Print Bill of Lading ☐ Cert Enclosed
☐ Print BOL Labels ☐ Use Bill To for 3rd Party Freight
☒ Print Shipping Labels ☐ Transfer Using From Bin
☐ Show Packing Screen ☐ Transfer Using Default Bin
☐ Show Tracking Information Screen ☐ Transfer to Bin
☐ Serialized Returnable Containers
☐ Print Commercial Invoice

Order	Item	Order Qty	Shipped Qty	Net Weight	Gross Weight	Cartons	Back Order Qty	Part Number	Description	Loc UM	Available Qty	Prom Date
44	001	10.0000						0040-00569-A	MAIN MOUNTING PLATE	EA	0.0000	02/09/22
44	002	97.0000	1.0000			96.0000		1-746290-0	CONNECTOR DC-50	EA	116.0000	02/09/22
44	003	100.0000						05-5259	POWER CART	EA	0.0000	02/09/22
44	004	9.0000						05-5259	POWER CART	EA	0.0000	02/09/22

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- In this example, script would only set the commission type for the salesperson on Sale order 44, line 2, due to it having the only non-zero qty under the "Shipped Qty" column.