



AUTOMATED COMMISSION PROCESSING WITH REWARD

7 SIMPLE STEPS TO PAYINGYOUR COMMISSIONS WITH REWARD





Brandwise Reward helps back office professionals manage who gets paid, how much they get paid, and automatically generates commission statements which keeps your management and sales reps smiling.

Reward allows you to easily automate commission tracking and payments and make day-to-day tasks easier for your back-office teams.

> BRANDWISE TECHNICAL SUPPORT Have some questions about processing commissions? Give us a ring 1- 877-435-3225 or email us at support@brandwise.com

PROCESSING COMMISSIONS



There are seven steps to successfully process commissions in Reward. These easy-to-follow steps will take you through the process of creating a commission batch and running the necessary reports.

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CREATING ABATCH



STEP1: CREATE A BATCH

Commission Batches are used to group invoices together into payment periods. Commissions can be forecasted based on batches for verification and once a batch is closed, commission payment reports can be run to determine each rep's pay for the period.

Under the COMMISSION CONTROL DATA menu, click on COMMISSION CONFIGURATION

The **Commission Payment Batch** tab is where your commission batches will be managed. There is no limit to the number of commission batches you can add in your system (monthly, weekly, bi-monthly, etc...) All open batches created here will display for selection when entering and paying commissions.

Commission Tracking Configuration	
Set-up And Defaults Credit Reason Pick List	Commission Payment Batch
Batch # Status AutoNumber Image: Count = 0	Display © Open Only C Closed Only C All
	Close

ADDING A PAYMENT BATCH

To add a payment batch, put your cursor in the blue date field to add a batch date. (MM/DD/YY format only) **Once a batch is closed, the data cannot be changed on an invoice payment.** However, reports can be run for all history data.



CREATING A CHECK REGISTER Rewar

STEP 2: CREATE A CHECK REGISTER

The **Vendor Commission Check Register** will allow you to enter in commission checks from your vendors upon receipt. It is recommended that you create a Commission Batch to apply all your invoice checks against.

Under the INVOICES menu, click on VENDOR COMMISSION CHECK REGISTER

endor Commission Check F	Register			
Vendor Vendor 2 Note: You cannot chang	ged the Commission Date if the Status =	Closed	'endor Status D Active) Invoice Only Active and Invoice Only) Inactive) All	Status to Show Open _ To enable adding new checks the Status to Show must = Open
	(Commission Checks for Ver	ndor 2	
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				Close (F12)

ADDING A NEW SUPPLIER CHECK

Toaddanew supplier check, select the supplier from the upper left. Then, enter in the check on the first available line. **Supplier Checks can be entered at any time, but internal check balancing must be enabled from the Commission Configuration screen.**



ENTERING IN INVOICES



STEP 3: ENTER YOUR INVOICES

On the Enter New Invoice menu, you will be able to enter all your vendor invoices in the Reward system. There are several shortcuts that can be used during the invoice entry to streamline the process.

Under the INVOICES menu, click on ENTER NEW INVOICES

Start by finding your sales order.

To do that, select the appropriate Rep Group. If you have multiple Rep Groups in your system the select the supplier that you wish to enter invoices for.

Then you can enter a new invoice by typing in the Sales Order Number or Invoice Number of the order that you wish to place the invoice against.

If you cannot find the order, you can click on the **Detail Search** button. The detail search will allow you to search by customer, supplier, territory, and dollar amount.

If you know that this is a Direct Invoice, then you will click on the Create Direct Invoice button. You will be asked to find the customer, select a supplier, and enter the invoice. A summary sales order will then be created for that invoice.

Rep Group	<u> </u>	Show Vendor: Active/Invoice Only 8
Yendor	- c	C All 9
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PO Number	(F3)	Use * for multiple wild character.
Invoice Number Enter your search information	(F4) in in the appropriate box above and then push the "Enter" key	Use % for single wild character
Create Direct Invoice	Invoice Automation 10se Last Invoice Bate	ABS' all values starting with ABS
Detail Search	2 Use Last PO Number	"AB" all values containing AB ABB1" any 4 digit value starting web ABB
	Payment Mode	ABSICIC any 5 digit value starting with ABS
	Default Commission Check	
	Goto Existing Invoice S Enter Invoice # and then push Enter Key	
	Direct OrderTaker Administrator -	Close (F12)

ENTERING IN INVOICES



Now you can enter your invoice data.

After you have entered in your invoice information in the invoice section, the *Invoice Screen* will appear. This screen will also give you details about that sales order.

In the Invoice Screen, enter the following invoice information: **Invoice Number, Invoice Amount**, and **Invoice Date**.

Once that is complete the commission payout will automatically be calculated based on all the commission rules set up in the system.

The *Commission Payout* sections will display the following information: **Commission Percentage** and **Commission Amount, Sales Rep Name** (including the main rep and the sharing rep, and a third rep when applicable), from Rep \$ and From Group \$.

When you are satisfied with the information displayed, click *New Invoice* or *Close* to return.

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ENTERING IN INVOICES



The *Invoice Screen* also contains shortcuts that can be used to access helpful info.

Invoice Section:

- New Invoice
- New Invoice for Same PO
- Update Rep Group
- Get Sales Order
- Assigned Sales Rep Rules
 - Will open the Assigning Sales Rep Rules
 - Displays Territory Sales Rep Rules
 - Displays Sales Rep Assigned directly to the Customer

Commission Section:

- Internal Correction
- Check Errors





STEP 4: MARK YOUR INVOICES FOR PAYMENT

The *Commission Payment Menu* will allow you to reconcile invoices that suppliers have submitted for payment to the agency and commissions that the sales rep will receive.

Under the INVOICES menu, click on COMMISSION PAYMENT

First, select the supplier that you want to process commissions. (you can also select *All Vendors*)

Then, select the commission batch created date that your invoices will be in (these dates are created in **Commission Configuration**)

Next, select a check to pay the commission from the vendor Check #.

Check the Pay check-box located in the Invoice section to add all invoices that will be paid in this

batch. These invoices will remain checked as "*Pay*" until the batch is paid.

Enabling Search Mode will automatically put the focus on the *"Pay"* check-box.

If Balance Commission Check is enabled, then you view the outstanding amount in "*Remaining Amt*"

Print Register and **Print Check Register** will allow you to sort and print the check register.

		Invoice			-	~			-		Completion				
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KEYBOARD SHORTCUTS:

Use the space bar to check and un-check

Use the **arrow keys** for **up and down** navigation

PROCESSING COMMISSIONS RUNNING COMMISSION FORECASTS



STEP 5: RUN YOUR COMMISSION FORECASTS

Before you close out your month, you should run a forecast to make sure your numbers look correct.

Under the ANALYSIS & REPORTS menu, click on REPORTS

You can choose Commission Forecasts, then choose to view them by Supplier of Sales Reps.

Select the Payment Date that you want to view, then click "Preview".

Category	Reports	
Commission Payments Commission Forecasts Sales Reps Jendor Customer Administration New Reports	Commission Payment Forecast By Sales Reps Commission Payment Forecast By Vendors	005 004
	Report Criteria	
Pre <u>v</u> iew <u>P</u> rint		







STEP 6: CLOSE OUT YOUR COMMISSION PAYMENT BATCH

Once you have verified that the forecasts are correct, you can close out the commission batch.

Under the INVOICES menu, click on COMMISSION PAYMENT

You must select a pay date from the drop-down to display the figures. These dates will be the available batch dates. Once you have done that you can click on *"Pay Commission."*

If you are using Balance Commission Check and the checks are **balanced**, you will receive a message confirming the commission payment. Click **"Continue"**. All invoices for that batch have now been paid!

If the check does *not balance*, you will get a message stating that **"Some Vendors cannot be paid,**

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please correct". At that point, you can enter in an adjustment on the check if you want it to balance with the batch.

To do that, double click on the check listed. The Check Register Adjustment Editor will appear. You will need to enter in the following information to make the adjustment: **Adjustment Amount**, **Adjustment Reason and Approved By.** When you have done that, click **"Close"**. The check will now balance the batch. Finally, click **"Pay Commission"** to finish up.

Double Click on Check # to edit Register)	and the second s	Com	mission Payme	nt Analysis			and the second second second		
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STEP 7: RUN YOUR COMMISSION PAYMENT

Once you have processed you commissions, you will run the **Commission Payment Report** that can be attached to the reps commission check.

Under the ANALYSIS & REPORTS menu, click on REPORTS

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ommission Payments commission Forecasts ales Reps lendor ustomer dministration lew Reports	Sales Rep Commission Payments By Batch Commission Payments By Vendor Commissions Paid - Sales Rep Summary Commissions Paid - Vendor Summary Sales Rep Commission Payments By Date	006 007 008 009 039
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First, choose "Commission Payments", then choose to view them by Vendor or Sales Reps. Select the Payment Date that you want to view and click "Preview".

Congratulations! You've just paid your commissions with Reward.



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- Sales & Territory Reporting: Vision
- General Brandwise News



BRANDWISE USER GROUP ON LINKEDIN

Join a community of passionate Brandwise users!



THE BRANDWISE TECHNOLOGY BLOG

Blog posts on industry news, tips & tricks, selling success stories and more!





ADDITIONAL RESOURCES



Brandwise makes it easy so you can sell more. You'll love our electronic order submission, online and mobile catalogs, and sales reporting tools for managers and sales reps.

All Brandwise solutions work together so everyone in your organization gets the tools and information they need to make selling easier.

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