



brandwise
Your Modern Sales Studio



AUTOMATED COMMISSION PROCESSING WITH REWARD

7 SIMPLE STEPS
TO PAYING YOUR
COMMISSIONS WITH
REWARD



Reward



Play



Vision



Reach



Stream

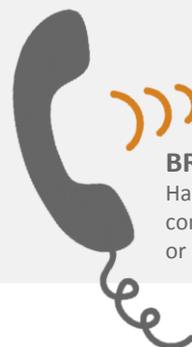
REWARD



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

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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 A BATCH



STEP 1: 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.

Batch #	Status	Date
AutoNumber		

Count = 0

Display

- Open Only
- Closed Only
- 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

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***

Vendor Commission Check Register

Vendor
Vendor 2

Vendor Status
 Active
 Invoice Only
 Active and Invoice Only
 Inactive
 All

Status to Show Open

To enable adding new checks the Status to Show must = Open

Note: You cannot changed the Commission Date if the Status = Closed

Commission Checks for Vendor 2								
Status	Date	Check #	Check Amt	Description	Comm.Date	Adj. Amount	Adjust.	Approved By
Open								
Total Check Amt		Total Adj. Amt		Total Available Amt				

Close (F12)

ADDING A NEW SUPPLIER CHECK

To add a new 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.



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.

INVOICE SCREEN - UNLOCKED

Sales Order

Vendor: **PM Vendor** Sales Order Location: **Food**

Customer: **Dr Comics & Mr Games**

Customer PO #: **100-106610** Sales Order #: **100-106610** Sales Order Amt: **395.25** Ship To: **Dr Comics & Mr Games**

Sales Order Date: **5/17/2007** Order Taker: **Albert Slater** Invoiced: **0.00** **8014 Piedmont Ave**

Sales Order Type: **Show** Sales Rep: **Barry Ervin** Pad Invoices: **0.00**

Sales Order Status: **Confirmed** Sales Order Source: **[Redacted]** Credit: **0.00** **Oakland**

Customer Acct #: **[Redacted]** Commission Zip: **94611** Back Ordered: **395.25** **CA 94611**

Vendor Ship Code: **[Redacted]** Cancel Date: **[Redacted]** Back Orders OK: Direct SO Rep Group: **Maklar Inc.**

Invoice

Invoice #: **[Redacted]** Amount: **0.00** Non-Comm: **0.00** Commissionable: **0.00** **New Invoice** **Get Sales Order**

Date: **[Redacted]** Credit #: **[Redacted]**

Reason: **[Redacted]** **New Invoice For Same PO** Invoiced: **57**

Note: **[Redacted]** **Update Rep Group** **Assigned Sales Rep Rules** Has Errors

Rep Group: **Maklar Inc.**

Commission

Commission	%	Amount	Sales Reps	%	From Rep \$	From Group \$
Total	0.00	0.00	Main Rep: Barry Ervin	0.00	0.00	0.00
Sales Rep	0.00	0.00	Sharing	-	0.00	0.00
Group	100.00	0.00	3rd Rep	-	0.00	0.00
Group Commission Amt		0.00	Sales Rep Totals	0.00	0.00	0.00

Transaction Type: **Payment** **Internal Correction**

Payment Date: **[Redacted]** **Check Errors**

Check #: **[Redacted]**

Check Paid Last Transaction Payment Order

Manual Pay Commission Reason for Manual Change: **[Redacted]**

Commission Records: 1

Delete Created: **05/25/07 3:46** Administrator **Play Commission Mode** **View Sales Order** **Close (F12)**



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

MARKING INVOICES FOR PAYMENT



Reward

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**)

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

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

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

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

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

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

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

The screenshot shows the 'Invoice Commission Payments for Vendor PM Vendor' window. At the top, there are fields for 'Check Balance' (Manual/Automatic), 'Vendor Check #' (6541), 'Check Date' (9/1/2007), 'Default Payment Date For Data Entry' (10/9/1/2007), 'Adj Check Amt' (-\$10,000.00), and 'Remaining Amt' (\$10,000.00). Below these is a table with columns: Invoice Number, Date, Customer, Comm. Amount, Total Amount, Payment Date, Check Number, PO Number, Main Sales Rep, and Sales %. The table contains 23 rows of invoice data. At the bottom, there are summary fields for 'Number Of Invoices' (23), 'TOTALS' (6,782.00, 883.68), and a 'Select By' dropdown menu. There are also buttons for 'Display' (All Unpaid Invoices, 2 Marked For Payment, 3 Not Marked For Payment), 'Date Range', 'Add New Invoice', 'Edit Invoice', 'Show Totals', 'Print Register', 'Print Check Register', 'Pay Commission', and 'Close (F12)'. Several elements are circled in red in the original image: the Vendor Check # field, the Check Date field, the 'Pay' checkbox in the table header, the 'Search Mode' checkbox, and the 'End Invoice' button.

KEYBOARD SHORTCUTS:

Use the **space bar** to check and un-check

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



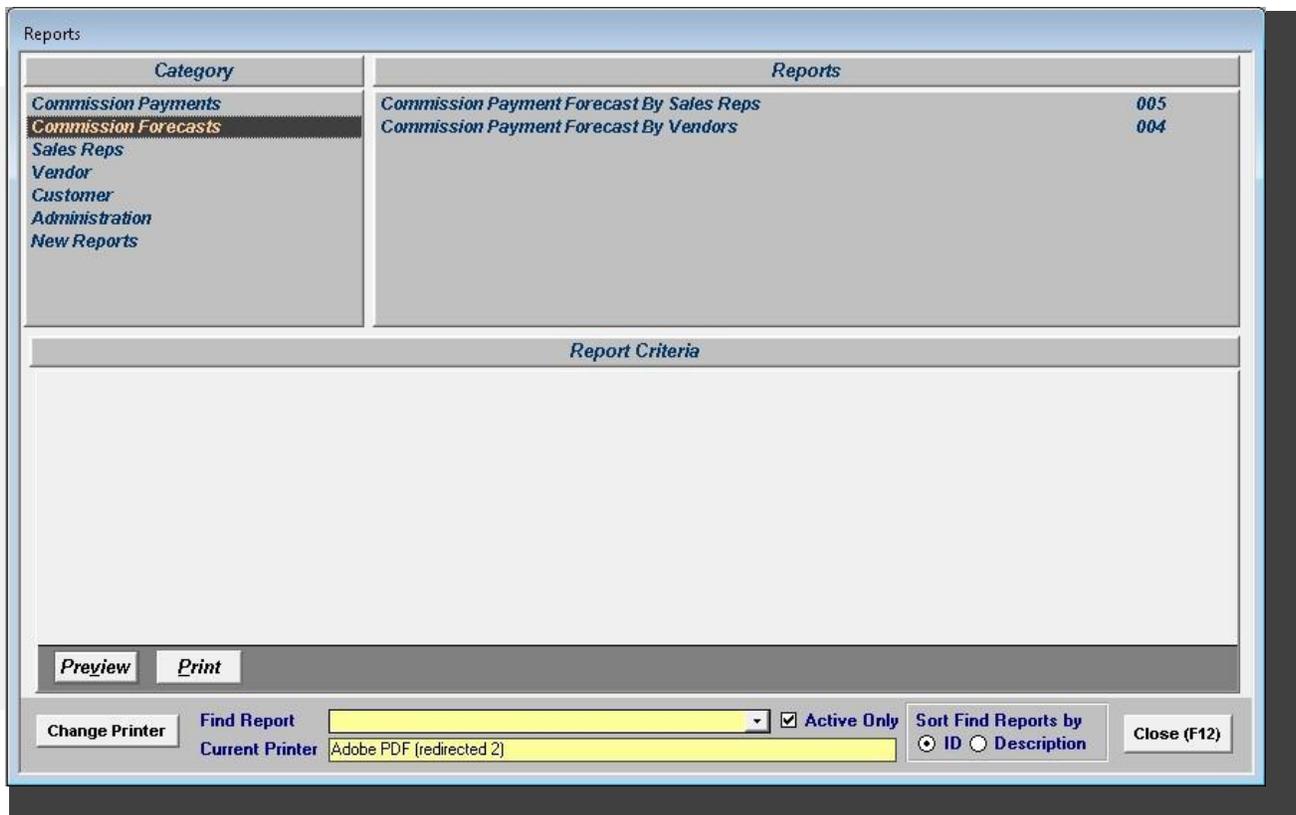
STEP 5: RUN YOUR COMMISSION FORECASTS

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”**.





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**

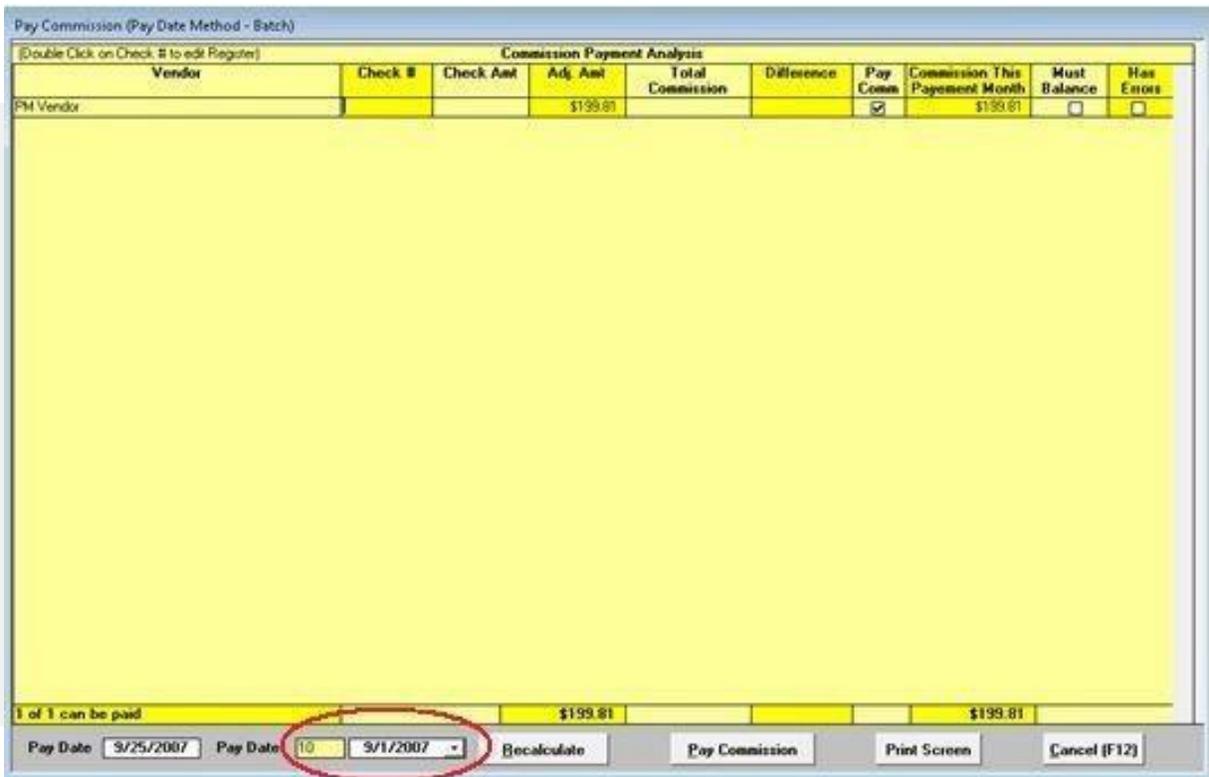
You must select a pay date from the drop-down to display the figures. These dates will be the available batch dates. Once you have done that you can click on **“Pay Commission.”**

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,**

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.

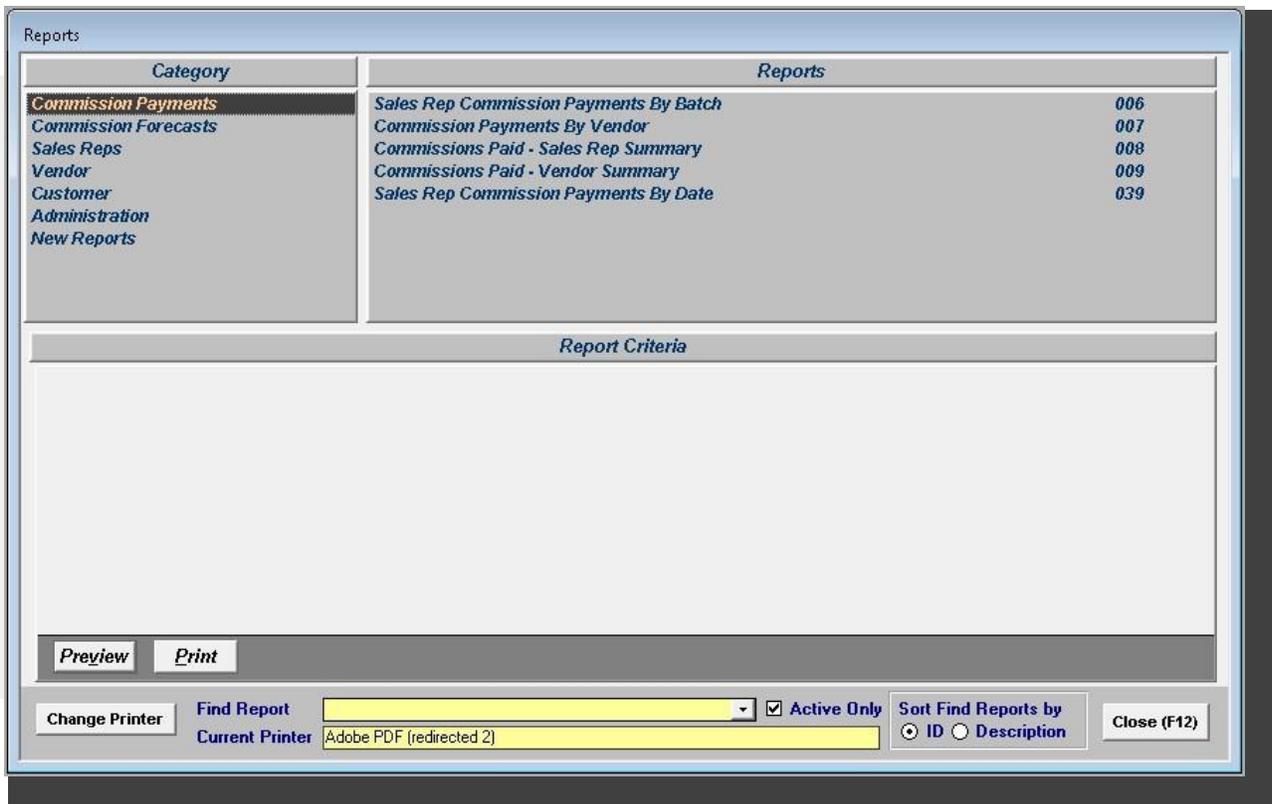




STEP 7: RUN YOUR COMMISSION PAYMENT

Once you have processed your 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***



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.

CONNECT WITH US!

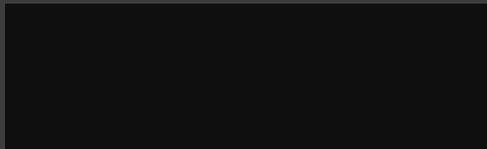


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