Sales Commission
For All Tally Users

Business Requirement
❖ Receivable details, ageing of pending bills and commission calculation according to each salesman is necessary to not only measure the performance of the salesman but also to enable the salesman to follow up with the collections.

With Tally As-is	With Sales Commission
❖ Pending bills to be collected and the ageing are available at the company level only	❖ Gives you the pending bills with ageing by each salesman
	❖ Calculates commission based on collections made by the salesman
	❖ Calculates the commission for each salesman based on the commission percentage you have specified
	❖ Calculates the commission only if the invoice has been collected with the payment terms
	❖ Calculates the commission only if the invoice margin is equal or greater than the expected margin you have specified for each salesman

If salesman is a cost centre or an employee, you can enter the percentage commission and the expected margin in percentage or amount

Cost Centre Creation (Secondary)

Name : **Salesman A**
(alias) :

Under : ⌐ **Primary**

Commission % : 1.50
Margin % : **10.00** Or Amount :

You can enter the ageing periods at the company level which will be applied for the commission report

Collections ageing
Collection Report Company

< 30 days
> 30 days & <= 45 days
> 45 days (Commission is not calculated)

If the margin for the Cost Centre/Employee has been specified in value

Collection Report					Collection Report Company							Ctrl + M
Cost Centre : Salesman A											1-Mar-2007 to 31-Mar-2007	
Date	Ref. No Voucher	Sales Amount	Actual Cost	Actual Margin	Estimated Margin	Cleared On	Nos of Days	Credit Days	Pending Collection	Actual Collected	Comm Perc	Comm Amount
	Collected Bills											
1-Feb-2007	001	57,000.00	50,000.00	7,000.00	5,000.00	20-Mar-2007	47 days	60 Days		57,000.00		
1-Feb-2007	Sale-001	57,000.00										
20-Mar-2007	Rcpt-3	57,000.00										
2-Mar-2007	003	56,000.00	50,000.00	5,800.00	5,000.00	10-Mar-2007	8 days	30 Days		55,800.00	1.50	837.00
2-Mar-2007	Sale-003	56,000.00										
5-Mar-2007	C/Note-1	200.00										
10-Mar-2007	Rcpt-1	55,800.00										
11-Mar-2007	004	54,750.00	50,000.00	4,750.00	5,000.00	15-Mar-2007	4 days	15 Days		54,750.00		
11-Mar-2007	Sale-004	54,750.00										
15-Mar-2007	Rcpt-2	54,750.00										
12-Mar-2007	005	55,500.00	50,000.00	5,500.00	5,000.00	31-Mar-2007	19 days	15 Days		55,500.00		
12-Mar-2007	Sale-005	55,500.00										
31-Mar-2007	Rcpt-4	55,500.00										
	Pending Bills											
2-Mar-2007	002	60,000.00	50,000.00	8,000.00	5,000.00		29 days	60 Days	2,000.00	58,000.00		
2-Mar-2007	Sale-002	60,000.00										
15-Apr-2007	Rcpt-5(PD)	58,000.00										
	TOTAL	2,83,250.00	2,50,000.00	31,050.00	5,000.00				2,000.00	2,81,050.00		837.00

If the margin for the Cost Centre/Employee has been specified in percentage

Collection Report					Collection Report Company							Ctrl + M
Cost Centre : Salesman A											1-Mar-2007 to 31-Mar-2007	
Date	Ref. No Voucher	Sales Amount	Actual Cost	Actual Margin %	Estimated Margin %	Cleared On	Nos of Days	Credit Days	Pending Collection	Actual Collected	Comm Perc	Comm Amount
	Collected Bills											
1-Feb-2007	001	57,000.00	50,000.00	14.00	10.00	20-Mar-2007	47 days	60 Days		57,000.00		
1-Feb-2007	Sale-001	57,000.00										
20-Mar-2007	Rcpt-3	57,000.00										
2-Mar-2007	003	56,000.00	50,000.00	11.60	10.00	10-Mar-2007	8 days	30 Days		55,800.00	1.50	837.00
2-Mar-2007	Sale-003	56,000.00										
5-Mar-2007	C/Note-1	200.00										
10-Mar-2007	Rcpt-1	55,800.00										
11-Mar-2007	004	54,750.00	50,000.00	9.50	10.00	15-Mar-2007	4 days	15 Days		54,750.00		
11-Mar-2007	Sale-004	54,750.00										
15-Mar-2007	Rcpt-2	54,750.00										
12-Mar-2007	005	55,500.00	50,000.00	11.00	10.00	31-Mar-2007	19 days	15 Days		55,500.00		
12-Mar-2007	Sale-005	55,500.00										
31-Mar-2007	Rcpt-4	55,500.00										
	Pending Bills											
2-Mar-2007	002	60,000.00	50,000.00	16.00	10.00		29 days	60 Days	2,000.00	58,000.00		
2-Mar-2007	Sale-002	60,000.00										
15-Apr-2007	Rcpt-5(PD)	58,000.00										
	TOTAL	2,83,250.00	2,50,000.00	13.30	10.00				2,000.00	2,81,050.00		837.00

Commission will not be calculated in the following cases,

For bills collected outside of the current period of the report (Example Bill 002 which is cleared using a post dated receipt will appear in the "Pending Bills" section with the suffix (PD))

Collection Report — Collection Report Company — Ctrl + M
Cost Centre : Salesman A — 1-Mar-2007 to 31-Mar-2007

Date	Ref. No Voucher	Sales Amount	Actual Cost	Actual Margin %	Estimated Margin %	Cleared On	Nos of Days	Credit Days	Pending Collection	Actual Collected	Comm Perc	Comm Amount
	Pending Bills											
2-Mar-2007	002	60,000.00	50,000.00	16.00	10.00		29 days	60 Days	2,000.00	58,000.00		
2-Mar-2007	Sale-002	60,000.00										
15-Apr-2007	Rcpt-5(PD)	58,000.00										

For bills with the "Nos. of Days" more than "Credit Days" specified in the invoice billwise details (Example Bill 005)

Collection Report — Collection Report Company — Ctrl + M
Cost Centre : Salesman A — 1-Mar-2007 to 31-Mar-2007

Date	Ref. No Voucher	Sales Amount	Actual Cost	Actual Margin %	Estimated Margin %	Cleared On	Nos of Days	Credit Days	Pending Collection	Actual Collected	Comm Perc	Comm Amount
12-Mar-2007	005	55,500.00	50,000.00	11.00	10.00	31-Mar-2007	19 days	15 Days		55,500.00		
12-Mar-2007	Sale-005	55,500.00										
31-Mar-2007	Rcpt-4	55,500.00										

For the bills with the "Nos of Days" more than the specified global final ageing period (Example Bill 001)

Collection Report — Collection Report Company — Ctrl + M
Cost Centre : Salesman A — 1-Mar-2007 to 31-Mar-2007

Date	Ref. No Voucher	Sales Amount	Actual Cost	Actual Margin %	Estimated Margin %	Cleared On	Nos of Days	Credit Days	Pending Collection	Actual Collected	Comm Perc	Comm Amount
1-Feb-2007	001	57,000.00	50,000.00	14.00	10.00	20-Mar-2007	47 days	60 Days		57,000.00		
1-Feb-2007	Sale-001	57,000.00										
20-Mar-2007	Rcpt-3	57,000.00										

For bills with "Actual Margin" lesser than the "Estimated Margin" entered for the salesman (Example Bill 004)

Collection Report — Collection Report Company — Ctrl + M
Cost Centre : Salesman A — 1-Mar-2007 to 31-Mar-2007

Date	Ref. No Voucher	Sales Amount	Actual Cost	Actual Margin %	Estimated Margin %	Cleared On	Nos of Days	Credit Days	Pending Collection	Actual Collected	Comm Perc	Comm Amount
11-Mar-2007	004	54,750.00	50,000.00	9.50	10.00	15-Mar-2007	4 days	15 Days		54,750.00		
11-Mar-2007	Sale-004	54,750.00										
15-Mar-2007	Rcpt-2	54,750.00										

In the example, only Bill 003 meets all the criteria for calculating the commission

Collection Report — Collection Report Company — Ctrl + M
Cost Centre : Salesman A — 1-Mar-2007 to 31-Mar-2007

Date	Ref. No Voucher	Sales Amount	Actual Cost	Actual Margin %	Estimated Margin %	Cleared On	Nos of Days	Credit Days	Pending Collection	Actual Collected	Comm Perc	Comm Amount
2-Mar-2007	003	56,000.00	50,000.00	11.60	10.00	10-Mar-2007	8 days	30 Days		55,800.00	1.50	837.00
2-Mar-2007	Sale-003	56,000.00										
5-Mar-2007	C/Note-1	200.00										
10-Mar-2007	Rcpt-1	55,800.00										

Note: The following fields will be shown in red color
- Any Actual Margin that is less than the Estimated margin
- Any "Nos of Days" (taken to clear the bill) that is more than the "Credit Terms"
- Any pending amount that is overdue for more than the last ageing period (say 45)

Additional Analytical Information

You can use F12: Configure, and set the option "Show Ageing?" to Yes to display the bills with the global ageing periods.

Configuration	
Show Ageing	? **Yes**

Collection Report					**Collection Report Company**									**Ctrl + M**	
CostCentre : Salesman A													1-Mar-2007 to 31-Mar-2007		
Date	Ref. No Voucher	Sales Amount	Actual Cost	Actual Margin %	Estimated Margin %	Cleared On	Nos of Days	Credit Days	<30 Days	30-45 Days	>45 Days	Pending Collection	Actual Collected	Comm Perc	Comm Amount
	Collected Bills														
1-Feb-2007	001	57,000.00	50,000.00	14.00	10.00	20-Mar-2007	47 days	60 Days		57,000.00			57,000.00		
1-Feb-2007	Sale-001	57,000.00													
20-Mar-2007	Rcpt-3	57,000.00													
2-Mar-2007	003	56,000.00	50,000.00	11.60	10.00	10-Mar-2007	8 days	30 Days	55,800.00				55,800.00	1.50	837.00
2-Mar-2007	Sale-003	56,000.00													
5-Mar-2007	C/Note-1	200.00													
10-Mar-2007	Rcpt-1	55,800.00													
11-Mar-2007	004	54,750.00	50,000.00	9.50	10.00	15-Mar-2007	4 days	15 Days	54,750.00				54,750.00		
11-Mar-2007	Sale-004	54,750.00													
15-Mar-2007	Rcpt-2	54,750.00													
12-Mar-2007	005	55,500.00	50,000.00	11.00	10.00	31-Mar-2007	19 days	15 Days	55,500.00				55,500.00		
12-Mar-2007	Sale-005	55,500.00													
31-Mar-2007	Rcpt-4	55,500.00													
	Pending Bills														
2-Mar-2007	002	60,000.00	50,000.00	16.00	10.00		29 days	60 Days	58,000.00			2,000.00	58,000.00		
2-Mar-2007	Sale-002	60,000.00													
15-Apr-2007	Rcpt-5(PD)	58,000.00													
	TOTAL	2,83,250.00	2,50,000.00	13.30	10.00				2,24,050.00	57,000.00		2,000.00	2,81,050.00		837.00

You can use F12: Configure, and set the option "Show Addl. Info?" to Yes

Configuration	
Show Addl. Info	? **Yes.**

This will display the following additional information,

Avg Collection		*20 days*	
Performance			
Company Total	2,26,050.00		2,81,050.00
Contribution %	125.30		100.00
TOTAL YtoD	2,83,050.00		2,81,050.00

"Average Collection" shows the calculation of total "Nos of Days" divided by the number of invoices fully collected within the report period.

Performance:
- "Company Total" shows the Sales and collections done by the company for the report period
- "Contribution %" calculates the percentage of contribution by the selected Cost Centre (salesman) compared to the overall company's sales and collection
- "Total YtoD" shows the Year-to-Date sales and collections done by the Cost Centre (salesman)

You can use F12: Configure, Sorting Method to sort the report

Configuration	
Show Ageing	? No
Show Addl. Info	? No
Sorting Method	: Ref No (Increasing)

Sorting Methods

Amount (Decreasing)
Amount (Increasing)
Currency (Decreasing)
Currency (Increasing)
Date (Decreasing)
Date (Increasing)
Default
Ref No (Decreasing)
Ref No (Increasing)

You can use Alt+F12: Range to filter the report

Range of Information in Report
(show only those lines satisfying the given conditions)

| Bill | having | Ref. Number | containing | 003 |