



Korcomptenz



# Sales Commission Process Automation boosted revenue and sales morale

See how we helped our client move out of spreadsheets by building a sales commission module on Dynamics 365 Business Central





## Client Overview

Industry	: Information Technology
HQ Location	: California, United States
Size of the Company	: Mid-size
Size of the Company	: ERP implementation + integration + customization
Systems + Devices Addressed	: Dynamics 365 Business Central, Sales, Purchase, Accounts, Inventory Management

## Key Issues

Xceptional was using a spreadsheet with various predefined formulas to track the commission payables of Partners and Salespeople. And, throughout the years, the company has **found it incredibly difficult to handle all of the data in a spreadsheet**, which is also unreliable. It was a time-consuming and an error-prone task.

- Xceptional sought a seamless sales module interface with the ConnectWise system to reduce human labour.

- The client had no system in place to track their commissions.

- Lack of integration systems leads to a loss of production.

# Company Overview

Xceptional provides business technology, cyber security, and managed IT. Their IT professionals leverage their technical expertise and strategic guidance to connect people anywhere, anytime. They help organizations of all sizes achieve their goals by delivering superior service and support in all areas of advanced information technology.

Our Client Chris started his profession in the early 1990s, much before the Internet and many of today's technologies. Chris discovered that businesses did not have a thorough understanding of technology to see its value. Chris's career in information technology was launched as a result of this opportunity, and Xceptional was able to focus on creating value and maintaining partnerships.





## The Backstory

As for the systems they had for financing, **QuickBooks was the prime application in use**. To suit its bookkeeping, forecasting, and commission calculation needs, the client used QuickBooks Premier Professional and spreadsheets to manage their business procedures. There was a need to automate finance operations that eliminated the laborious and time-consuming work connected with spreadsheet calculations. They wanted a **transition from ConnectWise and QuickBooks to Microsoft Dynamics 365 Business Central**. They needed to realign and modernize and were required to invest in a full ERP system with a sales and marketing package and, most importantly, a commission module.

Their old system couldn't calculate commissions; it could only make accounting entries, which they kept track of in spreadsheets. Another issue was that their systems were not connected, resulting in increased manual effort. The client wanted to **replace their QuickBooks system with an ERP system that would provide them with greater flexibility** and allow them to do their work faster while also expanding their market reach and revenue.



The client had been using ConnectWise as a sales system to record sales invoices and billing information to send to their clients. They intended to enter the accounting entries for those bills into their financial system, but they had to do it manually, which was a time-consuming task that could be also inaccurate. As a result, the client wanted ConnectWise be integrated with their financial system, Business Central, so that any invoices related to sales would be instantly integrated with Business Central. The integration has benefited the client in a variety of ways, including eliminating human errors, saving time, and making it easier for the client to handle and manage work, as well as calculating commissions using the sales invoice.

## Solution

Korcomptenz recommended upgrading to Microsoft Dynamics 365 Business Central after having a detailed discussion with the Client and determining what they required. They were able to manage their business processes more quickly and efficiently as a result of the improvement. Business Central and ConnectWise integration saved them a lot of time and made their work easier. They could keep track of customer contacts and obtain advice on the greatest upsell, cross-sell, and renewal chances throughout the sales cycle with Microsoft Dynamics 365 Business Central.

**ConnectBooster is a 3rd party payment gateway application that is installed in Business Central**, that assists the client in collecting payments from their customers. Because ConnectBooster is already integrated with Business Central, invoices are uploaded there immediately. ConnectBooster simplifies the payment process by eliminating several steps and providing invoices for pending payments. By linking your ERP system, it saves time on bookkeeping, eliminates double-data entry, and reduces human errors between accounting and ERP software. It also retains transaction records and tracks payments made in ConnectBooster.

The scope of the project was **to customize the application and automate the entire commission process**, so that whenever a sales invoice is posted, the commission ledger entry table(custom) gets updated with all the commission details and G/L entries will be created for the salesperson & partner commission amount. Commission details will be extracted from commission ledgers on a biweekly basis and sent to the respective salesperson & partners. We also collaborated with the customer to develop a new onboarding process with improved automation and superior user experience.

The customer had challenges in managing their commission process which was done manually and was very time consuming. Korcomptenz, provided an effective solution by enhancing the existing functionality within Dynamics 365 Business Central. **A custom process was created for automating the entire claims process by leveraging the platform capabilities for Dynamics 365 Business Central.**

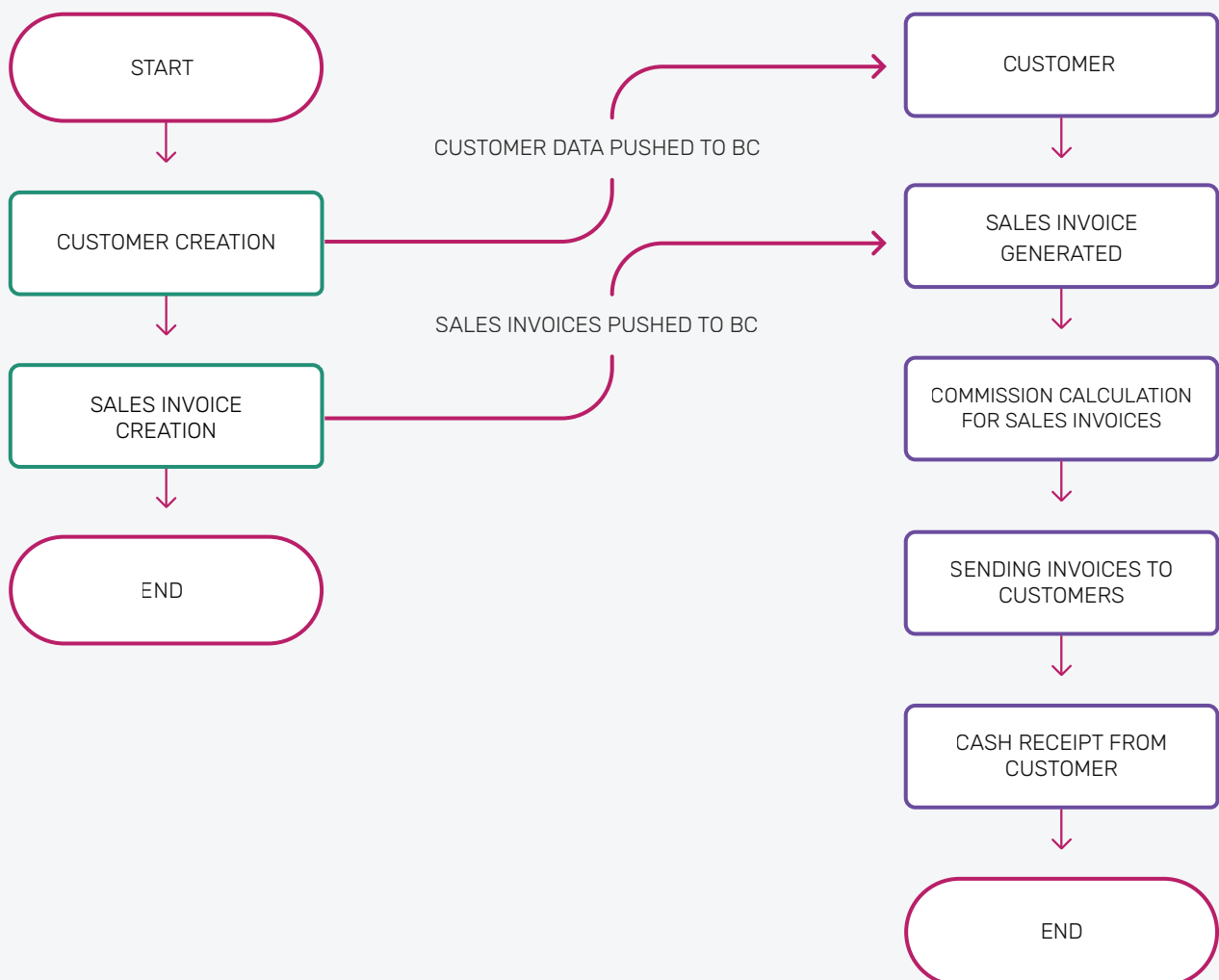


## BUSINESS PROCESS FLOW CHART

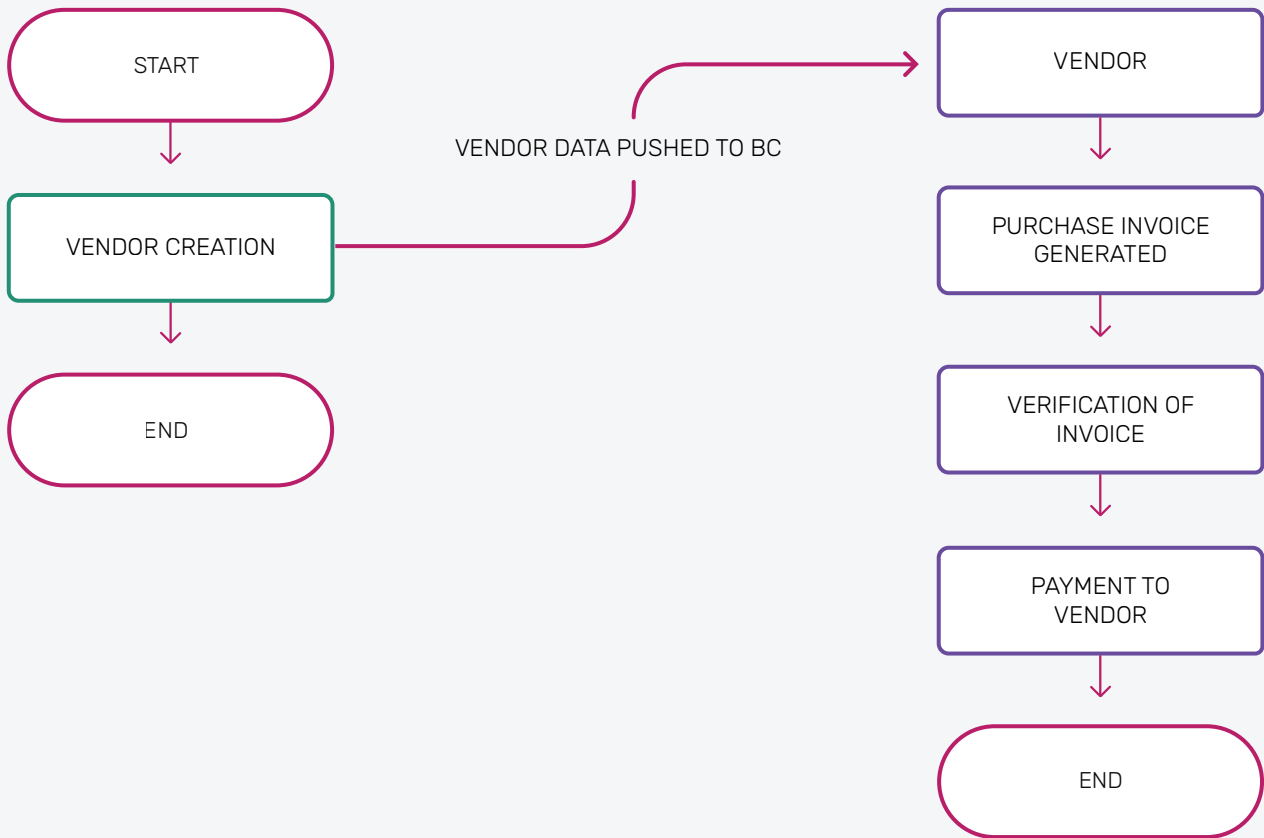
CONNECTWISE

BUSINESS CENTRAL

### SALES & RECEIVABLES



## PURCHASE & PAYABLES



## Who Benefited

### All the stakeholders – Sales team, Finance team, Partners

- 1 Modernized and automated business workflow with Cloud ERP
- 2 More Sales – Customers could be connected better for upsell, cross-sell and renewal deals
- 3 Empowered Sales Team – Not only were the commissions amount automatically calculated in a timely manner, but it also boosted the morale of the sales team (that included partners as well)

## Results

Introducing an **addon for commission module has made the commission payable tracking job a lot easier**. The automation of commission calculation has reduced erroneous transactions and human efforts as well. Integration has reduced the human effort of recreating the documents in the business central.

### Other benefits are as follows:

- Increased reporting capabilities.
- Commission reports are being sent as an email to Partners and Salespeople at regular intervals.
- Commission account entries are automated.
- By automating manual tasks, time and effort were saved.
- Reduce the time spent on document and invoice generation.
- Uptime on the workflow increased 100% by eliminating the old system.



Korcomptenz

**We #FocusOnYou**

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