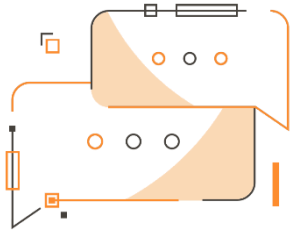# Sales Purchase Bonus

Bonus calculation and settlement in
Microsoft Dynamics 365 Business Central

Sales Purchase Bonus

App for Microsoft Dynamics 365 Business Central

The Sales Purchase Bonus Eos Solutions app allows to calculate and settle customer / vendor bonuses in Microsoft Dynamics 365 Business Central.

Do you need to create contracts and define terms for each customer or hierarchical group? Do you want to manage a periodic bonus forecast? Do you need to allocate the costs related to the maturing bonuses?

How it works

Thanks to the Sales Purchase Bonus (SPB) app you can:

- Create contracts and define terms

- Calculate the amount of bonuses to be paid to your customers or recognized by your vendors

- Allocate the costs related to the maturing bonuses

- Manage a periodic bonus forecast

Quick Guide
Ready in a few steps:

1. Enter the setup
2. Create contracts and terms
3. Let the system calculate allocations
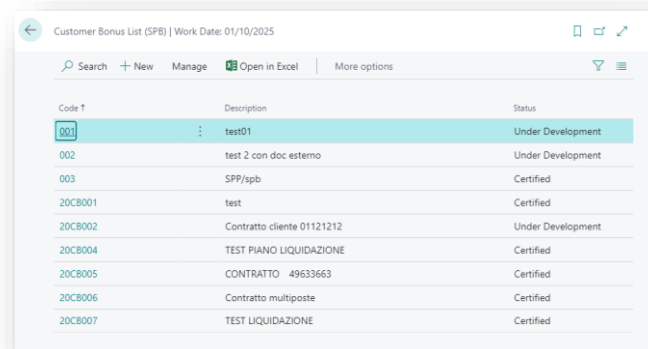4. Proceed with settlement

Sales Purchase Bonus - SUMMARY

Press ALT + Q and digit "SPB" for a list of the features involved:
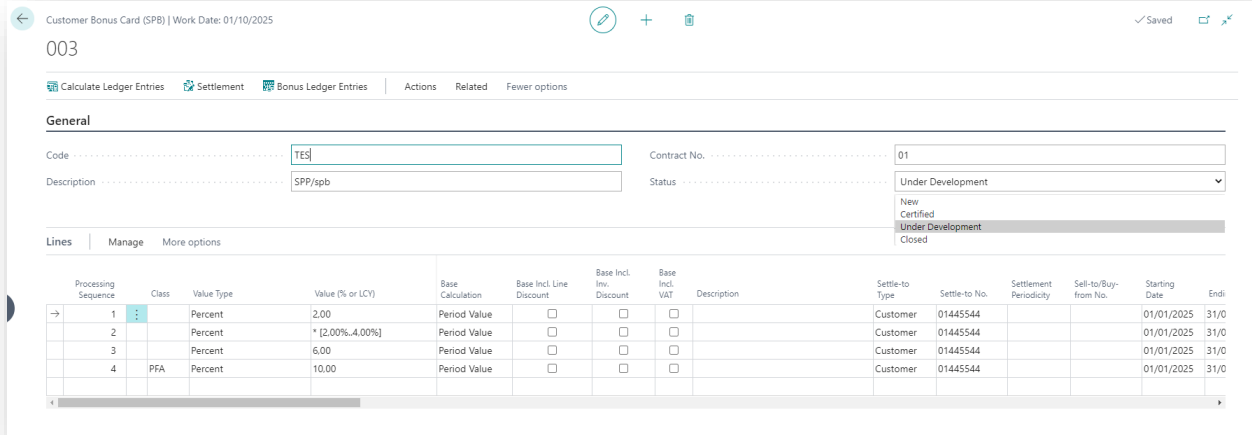

Setup contract lines

From the Customer Bonus List (SPB) select a card by clicking on the Code field:

The bonus card can contain an indefinite number of terms (contract lines). The contractual terms determine the calculation logic to be applied to the entries and its method of settlement.


Bonus Card Header

It is only possible to **modify** a contract if it is in the "**Under Development**" status and it is possible **to calculate and apply the accrued bonuses** only if it is in a **"Certified"** status

Bonus entries calculation

To calculate bonus entries, we open the Customer / Vendor Bonus List, select one or more lines, and choose Related->Bonus->Calculate Ledger Entries
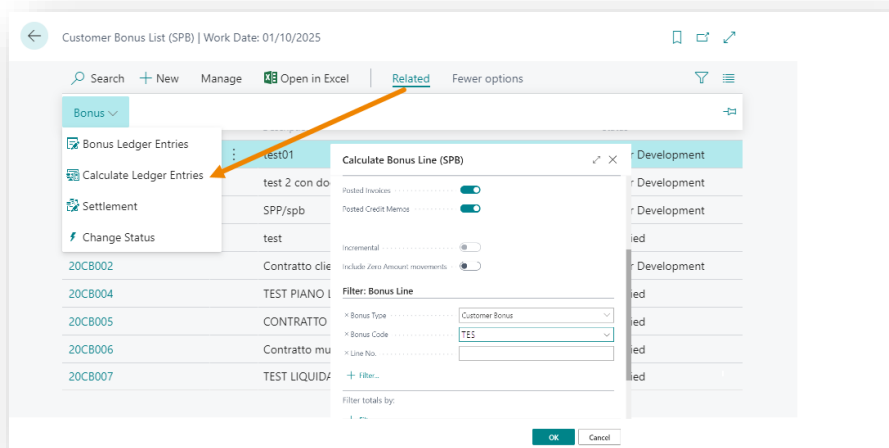
The calculation can be performed massively or per contract.

Business Central will calculate the tax base of the bonus calculation for all **certified** contracts.

This allows you to view the calculation basis of each contract line and any expected amount if the forecast is handled.

Bonus Settlement

Settlement can be carried out either massively, or by single contract or by single contract line.

We need to enter:

Field	Description
Starting / Ending Date	posting date range of entries to be settled
Settlement Type	• From setup: bonus are settled on the G/L accounts or item charge indicated in setup. • G/L Account / Item Charge: you must enter the G/L account number or item charge code in the "Settlement No." field
Settle Temporary Entries	original movements in the liquidation plan, temporary entries represent "provisional" bonuses, usually dependent on additional conditions.

Modify amounts

From the journal you can change the amount of the bonuses, the change automatically updates the temporary settlement document. Deleting a bonus line deletes the reference document.

Subscription

Some features of the Sales Purchase Bonus app require a subscription.

The subscription can be activated from Subscription control panel or directly from the notification messages that the system proposes, by clicking on the link that allows you to start the subscription wizard

Contact us for more info:

www.eos-solutions.it/en/contact-support.html