



The “Commercial Agents” module allows you to manage agents' commissions, generating, from each of the customer invoices, the corresponding commission invoices to suppliers.

General characteristics of the module are:

- the possibility of defining the custom text to be included in the lines of supplier invoices ([substitution variables](#) are allowed)
- the calculation of the commissions can be done:
 - . in absolute value
 - . percentage of turnover
 - . percentage on the margin
- up to 3 commissions are possible for each customer invoice
- the margin of the customer invoice is calculated including the commissions and displayed in the appropriate section of the margins on the invoice page
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An analysis of the margins (general, per customer, ...) including commissions completes the functionality of the module.

1) Module configuration

During the setup phase it is possible to define the text that will be inserted in the lines of the invoices for the agents and identifying the commission.

Notice how:

- the use of Dolibarr's [substitution variables](#) is possible
- the following 2 substitution variables are also available
 - __COMMISSION_AMOUNT__ amount of the commission
 - __COMMISSION_TYPE__ type of commission (value, turnover, margin)

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Commercial Agents setup page

Parameter	Value
Default text in the invoice	<div style="border: 1px solid #ccc; padding: 5px;"><p>Commissions deriving from invoice no. __REF__ of the __DATE_DELIVERY__ issued for the customer __THIRDPARTY_NAME__ for a total amount of € __AMOUNT__</p><p>Commission of __COMMISSION_AMOUNT__ on __COMMISSION_TYPE__</p></div>

SAVE



2) Use of the module

2.1) Set default for the customer

For each customer it is possible to set the following default values that will be proposed in the corresponding invoices:

- Principal Agent
- Type of commission calculation (value, turnover, margin)
- Amount or percentage of commissions

The screenshot shows the 'Clienti' (Customers) management interface. The 'Main Agent' field is highlighted with a red box. The customer details are as follows:

Nature of Third party	C	Customers tags/categories	
Customer Code	CU1911-00002	Third-party type	
Barcode		Workforce	
EORI number		Business entity type	
VAT ID		Capital	
		Incoterms	
		Environment	Azienda Principale
		Financial category	Norh Italy
		Main Agent	ANNAMARIA MAZZA
		Calculation of commissions	Fixed
		Amount / Perc. commissions	8.00000000

2.2) Invoicing operations

At the time of invoicing, a specific Tab allows you to enter commission data.

Note that the invoices in the list are the only invoices in "Draft" status relating to the selected supplier.

The screenshot shows the 'Agents' tab in the invoicing interface. The 'Agents' tab is highlighted with a red box. The invoice details are as follows:

(PROV37)
Ref. customer : ORCL1
Third Party : Cliente generico
Project : PJ1911-0001 - Progetto 1

Draft (needs to be validated)

Vendor	Commissions type	Value	Associated invoice
CA DEI FIORI SRL	Fixed	100	(PROV649) - 30/06/2021
CLECA spa	On turnover	5	(PROV235) - 25/02/2021
Select a third party	Fixed	0	

SAVE



Organizzazione Progetti Gestionali

Upon confirmation of the commissions, the values entered are calculated and entered in the margins section

Margins	Selling price	Cost price	Margin	Margin rate	Mark rate
Margin / Products	108.90	0.00	108.90		100.00%
Margin / Services	0.00	0.00	0.00		
Commissions		105.445			
Total Margin	108.90	105.445	3.455	3.28%	3.17%

When the customer invoice is confirmed, the corresponding lines are generated in the selected supplier invoice (on invoices).

Commissions deriving from invoice no. Commissions deriving from invoice no. **FA2010-0017** of the of the customer **Cliente generico** for a total amount of € **132.86**

22% (22)	100.00	122.00	1	T	100.00
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By returning the invoices in draft state, the lines will be deleted.

2.3) Margin analysis

Finally, a new item was added to the margin analysis.

Product margins Customer margins User margins Margins detail **Margins with Commissions**

Third-party name **Cliente importante (Presudonimo)**

Product or Service

Tag/category

Start date (Validation date) **Now** End date (Validation date) **Now** **REFRESH**

Margin details (2)

Invoice	Invoice date	Selling price	Cost price	Commissions	Margin	Margin rate	Mark rate
FA2206-0014	30/06/2022	500.00	475.00	175.00	25.00	5.26%	5.00%
FA2201-0013	14/01/2019	349.60	184.00	0.00	165.60	90.00%	47.37%
Total Margin		849.60	659.00	175.00	190.60	28.92%	22.43%

The commission column was also included in the list of active invoices, but it was not possible to recalculate the margins here.



Organizzazione Progetti Gestionali

Cust./Prosp. tags/categories

Payment Term	Amount (excl...)	Margin	Margin rate	Mark rate	Commissions	Status
30/60 gg DFFM	139.61	39.61	39.61%	28.37%	20.00	Draft
	-61.00	-61.00			0.00	Refunded or converted
30/60 gg DFFM	100.00	100.00		100.00%	0.00	Started
30/60 gg DFFM	500.00	200.00	66.67%	40.00%	175.00	Not paid