

OPTIMIZING COMMISSION MANAGEMENT WITH WORKATO & NETSUITE ERP SERVICES



Case Study

Florida, USA - Optimizing Commission Management with Workato & NetSuite ERP Services

Introduction

Previously, commission calculations were performed manually, leading to inefficiencies and errors. The process involved tracking invoice payments, deducting credit memos, and computing commissions manually. To enhance accuracy and efficiency, Codinix implemented automation using Workato as part of its [NetSuite ERP Services](#).

Client Overview

The client, a consumer goods company specializing in distribution and partner sales, required an automated Netsuite ERP Solution to handle commission calculations efficiently.

Case Objective

To automate the commission calculation process by integrating Workato with NetSuite, ensuring commissions are accurately calculated and stored while reducing manual intervention. This objective was met through Codinix's role as one of the experienced Netsuite ERP Partners.

Client Challenge

- Manual tracking of invoice payments and commission calculations was time-consuming and error-prone.
- Partial payments made commission calculations complex.
- The existing process involved manually entering commissions into Paylocity, leading to inefficiencies.
- Tracking credit memos and net invoice amounts required additional effort.

Solution Offered by Codinix

Workato Automation: Codinix implemented an automated workflow to fetch invoice data from NetSuite, track payments, and calculate commissions as part of its broader Netsuite ERP Services offering.

1). **Commission Calculation Logic:**

- Commissions are calculated based on the invoice amount and the commission percentage assigned to the customer.
- If an invoice is partially paid, the commission is calculated only for the amount paid in that month.
- Credit memos are deducted from the invoice before calculating commissions.

2). **Data Storage in NetSuite:** Monthly consolidated commissions are stored in the Sales Commissions

object, while individual invoice-based commissions are recorded in the Expense Lines object, forming part of the tailored [Netsuite ERP Solution](#).

3). **Scheduled Execution:** The workflow runs on the first of each month to process the previous month's invoices.

4). **Seamless Integration:** Codinix ensured smooth data flow between NetSuite and Paylocity, eliminating manual entry errors, highlighting their strength as reliable Netsuite ERP Partners. and automation

Results Achieved

- Automated commission calculations, reducing human errors
- Faster commission processing, saving manual effort
- Seamless integration with NetSuite and Paylocity
- Accurate commission payouts based on actual payments

Conclusion

By leveraging Workato and delivering expert Netsuite ERP Services, [Codinix](#) successfully automated commission calculations, improving accuracy, reducing manual workload, and ensuring timely commission payouts. The Netsuite ERP Solution provides a scalable and efficient process, eliminating errors and enhancing operational efficiency through a trusted Netsuite ERP Partner.