

Sales Reports

Overview

At the end of each month, you can generate sales reports for your media suppliers with the click of a button. You can automatically generate Sales Reports for your suppliers (Authors and Partners) based on posted payments (invoice items), metadata (Author Code), and Contract details linked to each media file.

Before you start

Before generating sales reports, ensure the following steps are completed in Backstage:

1. Set up authors (photographers).
2. Create an upload folder.
3. Configure and assign an action run to the upload folder.

Note

Refer to **Media Delivery by New Photographer** for detailed instructions on configuring these steps.

Enter contract details (only for photographers without full rights)

The contract linked to a media file sets the license fees the photographer earns from selling that file. Therefore, you must conclude a contract for each photographer who does not provide entirely their own content.

The first contract you create is the photographer's standard contract and it is associated with all their media files. If necessary, you can create additional contracts with different conditions and then assign different contracts to different media files.

To specify contract details and contract terms:

1. Navigate to **Purchasing > Authors** and select a photographer record from the overview.
2. In the photographer's master data, select the **Contracts** tab.
 - In the **Settlement Period** field, specify the payment frequency for the photographer.
 - Sometimes photographers have a small amount of fees, in this case you can set a threshold for generating a sales report. To apply this, enable the **Limit Settlement** option and define the minimum payable amount.
3. Click **Save**.
4. Click the **Contract Terms** submenu.
5. Select **Edit Contract Terms > New**.
 - Leave the **Contract Number** field blank. The system will automatically populate it based on your number range settings under **Administration > Company Settings > Number Ranges**.
 - In the **Name** field, enter a descriptive name for the contract (for example, *40% Standard Contract - Jim Smith*).
 - **Note:** A descriptive name is especially important if a photographer has multiple contracts.
 - In the **Contract Date** field, enter the date when the contract should take effect.
 - In the **Contract Terms** panel, enter the percentage or fixed fee that the photographer is entitled to for each media file sold under this contract.
6. Click **Save**.

Authors / Editing 'AUT020 Minerva Photos' Author

Master Data	Contacts	Contact History	Accesses	Outputs	Contract	Restrictions	Financial Documents	Light	<	>
General Contract Terms Additional Calculations										
▼ Language for Invoicing Purposes										
Language (ERP):		English (USA) ▼								
▼ Currency for Accounting Purposes										
Currency:		US dollar \$ (USD) ▼								
Currency Rate:		Average Rate ▼								
▼ Settings for Settlements										
Settlement Period:		Monthly ▼								
Last Settlement:		01/31/2020								
		+00:00								
Limit settlement:		☐ Only create Sales Reports that reach the minimum amount								
Settlement Block:		☐								
▲ Financial Accounting Warnings										
Cancel and Back to Overview										
Save										

Author's master data > Contract tab

Authors / Editing 'AUT020 Minerva Photos'

Master Data	Contacts	Contact History	Accesses	Outputs	Contract	Restrictions	Financial Documents	Lightbox
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General **Contract Terms** Additional Calculations

<< < 1 (2) > >>
 [Back to Contracts Overview](#)
[Edit Contract Terms](#)
[Templates](#)

General Contract Data

Contract Number:

Name: *

Contract Date: *

Standard Contract: ☒

Contract Addendum Data

This is the Basic Contract. Any Addendums that are part of this separate respective Addendum forms.

Contract Time Limit

If this Contract is only in effect for a limited period of time, enter the corresponding date range.

☐ Contract is time limited

Conditional Period of Contract Terms

If the terms of this Contract are not general, and should only apply to media Archive (publish) Date or metadata Creation Date, then select the checkbox Date Type, and enter the corresponding period.

☐ Terms are only valid for a specific period

Contract Terms

Enter the share of sales proceeds as a percentage or amount.

Calculation	Percent *	Amount
☒ Percent ☐ Amount	40.00 %	\$

Author's master data > Contract tab: Contract terms

Tip

If necessary, contracts can be more complex, with date restrictions, exceptions based on metadata, and so on.

Set up country restrictions (Optional)

To set up restrictions for the photographer (for example, they can only be distributed in the United States):

1. In the author's master data, switch to the **Restrictions** tab.
2. Select **Edit Author Restrictions > New**.
3. The Restrictions dialog will guide you through the settings depending on the selected restriction type.

Authors / Editing 'AUT020 Minerva Photos' Author / New Restriction

Master Data	Contacts	Contact History	Accesses	Outputs	Contract	Restrictions	Financial Documents	Light	<	>
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Back to Restrictions Overview

▼ General Data

What type of restriction do you want to set up?

☒ Geographic Restriction ?
 ☐ Access Username Restriction ?
 ☐ Access Group Restriction ?

Cancel and Back to Overview

Next >>

Author's master data > Restrictions tab

Note

If you need assistance with configuring specific rights, contact us at support@picturemaxx.com

Generate sales reports

To initiate a settlement run and generate a sales report, follow these steps:

1. Navigate to **Finance > Sales Reports > Settlement Run**.
2. In the **Settlement Date** field, set the date that will appear on the sales reports.
3. In the **Settlement Period** panel, specify the Settlement Periods for which to generate the reports. These must match the Settlement Periods selected on your supplier Contracts.
 - To generate additional Sales Reports for suppliers that have already been settled within the chosen periods, enable **Settle already-settled suppliers again**.
4. In the **Master Data Range** field, you can limit the Sales Reports to a specific group of suppliers by entering their master data number range.
5. In the **Settlement Criteria** panel, you can manage how partial payments are handled. These are relevant if you post partial payments against open Invoices:
 - Select **Combine partial payments for a single Item into one entry** to avoid listing each payment separately in sales reports.
 - Select **Only settle Items that are 100% paid** if you want sales to appear in a supplier's sales report only after the item is completely paid.

- You can choose whether to enable or disable the **Distribute overpayments** option for certain scenarios.
 - Select the **Settle all Items** radio button to include every item with payments posted within your specified date range.
 - Select **Only settle the specific Items that are currently selected**, and then select the individual Items that you want included in the Report.
6. To preview which images will appear in the sales reports, click **View Selection**.
7. After finalizing your settings, click **Generate Sales Reports** to begin automated document creation. The process may take several minutes, depending on the data volume. You can tell if the run is completed by switching to the **Completed Settlement Runs** tab.

Sales Reports / Settlement Run

Settlement Run	Completed Settlement Runs
▼ General Information In this area, you can automatically generate Sales Reports for your suppliers (Authors and Partners) based on their Contracts and on posted payments.	
▼ Settlement Period Settlement Date 01.12.2025 ☐ Twice per Month 11/16/2025 - 11/30/2025 ☐ Monthly 11/01/2025 - 11/30/2025 ☐ Quarterly 07/01/2025 - 09/30/2025 ☐ Semi-Annually 01/01/2025 - 06/30/2025 ☐ Annually 01/01/2024 - 12/31/2024 ☐ Settle already-settled suppliers again	

Sales Report > Settlement Run configuration

Tip

In the **Completed Settlement Runs** tab, you can review which settings and date ranges were used for previous run.

Sales Reports / Settlement Run

Settlement Run											
Completed Settlement Runs											
Edit ▾											
Quick Search Filter Sorting Views ▾ Export											
	ID	Access (≡)	Access	Task Proces...	Date Created	Status	Date from	Date to	Master Data from	Master Data to	Only settle 100% paid
≡	123	1525	Valentina	72511174	13.01.2025 11:5	✓	01.10.2024 00:0	31.12.2024 00:0			✓
≡	124	1525	Valentina	72511189	13.01.2025 12:0	✓	01.01.2024 00:0	31.12.2024 00:0			✓
≡	125	1525	Valentina	72521474	15.01.2025 11:1	✓	01.10.2023 00:0	31.12.2023 00:0	132118	132118	✓
≡	126	1525	Valentina	72526760	16.01.2025 17:3	✓	01.11.2024 00:0	30.11.2024 00:0	130965	130965	✓

Overview of Completed Settlement Runs

View, manage, and post generated sales reports

All automatically generated sales reports are listed under **Finance > Sales Reports > Sales Reports**.

To view the details of a statement, open the document either by double-clicking it or by selecting **Edit > Open**.

Customize views

You can create custom views, similar to invoices, to display all the fields you need.

- To see all the positions (line Items) in sales reports in one view, change the **View** menu to **Line Items**.

Edit sales reports

If needed, you can manually adjust sales reports; for example, to add additional Items.

Post sales reports

Once sales reports are finalized, you can post them to **Finance > Open Item Management > Open Items and Payment (Edit > Post Financial Documents)**.

Important

After you post a financial document, you cannot edit it.