

SALES TERRITORIES - OPTION 150

A default territory and salesman number (01) for house account (99) was automatically created for your company. Reports can still be printed for this account if you want to review customers and revenues. However, if you are selling your products through multiple distributors or sales representatives, you will need to create additional sales territories and salesman numbers for tracking and commissions. Territories may be based on geographic area, sales channels, industrial sectors or any other criteria.

Note: Customer Accounts are assigned to a Territory, NOT a Sales Representative. We suggest the salesperson number be the same as the Territory number if you want to assign a sales rep to a specific customer account.

To Add, Edit or Deactivate territories:

Choose **1. Main Menu.**

150. Sales Territory Menu.

151. Work with Territories.

Choose 'change' to edit territory names or deactivate a territory.

ADD A NEW TERRITORY.

- ➔ Verify your company number, **do not [Enter]**.
- ➔ Insert the next available territory number. (If unknown, “display” your list of territories from the drop down box to find the next number.)
- ➔ Choose **[F6=Add]**. The **Add Territory** screen appears. Insert the new Territory Name
- ➔ Insert A to activate the territory and **[Enter]**.
- ➔

ADD A NEW SALES REPRESENTATIVE

Choose **1. Main Menu.**

150. Sales Territory Menu.

153. Work with Sales Rep

- ➔ Insert the Company Number
- ➔ Insert the Salesperson Number:
- ➔ Choose [F6=Add]

Conveyorware Distribution System FMW CONVEYOR
WORK TER300D3

Work with Salesperson

Company Number 112
Salesperson Number 2 or Position to ...
Position to Salesperson Number.:
Select option, press Enter.

Opt	Salesperson Number	Salesperson Name
▼	001	Office

Exit Prompt Cancel Help Refresh Add Add Multiple

- ➔ Insert the Salesperson number again.
- ➔ Insert the Salesperson's name.
- ➔ Insert the Salesperson's commission percentage for this Territory (if applicable).
- ➔ [Enter]

Conveyorware Distribution System FMW CONVEYOR
ADD TER305D1

Add Salesperson

Salesperson Number....: 2
Salesperson Name.....: JOHN DOE X
Commission Percent....: 5

Conveyorware Distribution System FMW CONVEYOR
WORK TER300D3

Work with Salesperson

Company Number 112
Salesperson Number 2 or Position to ...
Position to Salesperson Number.:
Select option, press Enter.

Opt	Salesperson Number	Salesperson Name
▼	001	Office
▼	002	JOHN DOE

Exit Prompt Cancel Help Refresh Add Add Multiple

ASSIGN SALES REPRESENTATIVE TO TERRITORIES

One Sales Rep is pre-assigned to the one default territory created for each new company. Just as you must add Territories you must add Sales Reps to the ‘master’ lists. Territories and Sales Reps must first **exist** before they can be selected in an Order screen.

Choose **1. Main Menu.**

150. Sales Territory Menu.

152. Assign Sales Rep to Territory

Conveyorware Distribution System FMW CONVEYOR
WORK TER310D3

Assign SalesRep. to Territories

Enter Territory/Company.....: - (when using F6/F18 to add...)

Position to Territory/Company...: -

Select option, press Enter.

Opt	Ter#	Cmp Num	Sales Rep.	Del
<input type="text"/>	01	111 001	Office	
<input type="text"/>	01	112 001	Office	
<input type="text"/>	02	112 001	Office	
<input type="text"/>	02	112 002	JOHN DOE	
<input type="text"/>	03	112 001	Office	
<input type="text"/>	03	112 003	MARY SMITH	
<input type="text"/>	01	113 001	Office	
<input type="text"/>	01	114 001	Office	
<input type="text"/>	01	115 001	Office	
<input type="text"/>	01	116 001	Office	

Previous Next

A list of companies (if multiple) and territories which have Sales Rep assignments will appear. If a Territory has no Sales Rep assigned to it, it will not appear in this list.

- ➔ Enter the new Territory number and Company number
- ➔ Choose [F6=Add]. The **Add Territory/Sales Rep** screen appears.

Conveyorware Distribution System FMW CONVEYOR
ADD TER315D1

Add Territory/Salesrepresent.

Company Number.....: 112

Territory Number....: 3

Sales Rep. Nbr... : 3

Commission Percent.: 5

- ➔ Insert the new Sales Rep number
- ➔ Insert Commission Percent (if applicable) [Enter]

➤ **REMEMBER** this commission is for THIS Sales Rep in THIS Territory. The system will default to this commission rate only if none is specified in Inventory or Order records.

Use the dropdown box to delete or change Sales Rep information.

COMMISSIONS

If you are selling your products through distributors or sales representatives, you will need to create sales territories and salesman numbers. This should be completed in the Sales Territory Menu Option 150. (See previous pages.) You can assign a salesman to a specific company by making the salesman number and territory number the same. In addition, it is very important to identify in Option 305, of the Inventory master file, when commissions will be paid by choosing Yes in those class codes.

There is a hierarchy in commission structures. The list below begins with the most general structure and ends with the most detailed structure. Commissions are assigned by creating territories in Option 150, assigning salesmen to those territories in Option 152, and assigning territory numbers to the customer files in Option 201. If more than one salesman is assigned to a territory, choose the salesman of record from the drop-down list while entering the order.

Commission percentages can be assigned on different levels. Each level will override the prior level.

Level One – In the Customer master file (201) assign a territory and commission % for all sales specific to that customer.

Level Two – In the Territory master file (150) assign a Sales Representative and a commission % for all sales by that Sales Representative.

Level Three – In the Territory master file (150) assign a Territory to a Sales Representative and a commission % for all sales in that Territory.

Level Four – In the inventory master file (301) assign a commission % to a specific stock number. The commission will stay the same regardless of quantity of items sold.

Level Five – In the inventory master file (301) assign a commission \$ to volume price breaks. (Sell more items at a lower value, pay less commissions.)

Level Six – In the default order menu (419) assign a commission % to each line of a recurring invoice.

Level Seven – When creating an order manually (401) there is an option to change the salesman of record. At this point you may also change the commission % assigned to each line item.

NOTE: If you change the quantity in an order with a commission % attached, clear the commission % field so the system can re-calculate the commission % automatically.

(See: Day, Month, Year-end Processing, Section 10, to process commission reports.)

If you do not pay commissions, a default territory and salesman number (01) for house account (99) has been created. Reports can be printed for this account if you want to review customers and revenues.