

Salesperson Commission by Territory

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Salesperson Commission by Territory

Feature Summary

Studio Showroom allows you to define commissions for a salesperson optionally based on client territory, sales territory, client, type, product location in the showroom, vendor and sales code.

Setup Standard Client Territories, Sales Territories, Client Types, Locations in Showroom

- Define a standard list of client territories that clients may be associated with, BOSTON
 - Define a standard list of sales territories that clients may be associated with, MA
 - Define a standard list of client types that clients may be associated with, RES
- Define a standard list of locations in the showroom vendors may be associated with, 3RD FLOOR

Attach Client Territories, Sales Territories and Client Types to Clients

- Attach a client territory to a specific client, DOUGLAS belongs to BOSTON
- Attach a sales territory to a specific client, DOUGLAS belongs to MA
- Attach a client type to a specific client, DOUGLAS belongs to RES

Attach Location in Showroom to Vendors

- Attach a location in showroom to a specific vendor, EUROFAB in on 3RD FLOOR

Define Commissions Payable to Salespeople based on the Territories, Location and Vendor

- Define a record for each commission option for a salesperson
- Each commission definition record has a starting date and an ending date
- The commission definitions only apply to orders placed within the starting and ending date
- A salesperson may receive commissions for three client territories
- A salesperson may receive commissions for five sales territories
- A salesperson may receive commissions for one sales territory in a specific client territory

Print the Commission by Territory Report

- Print the commission by territory report to define commissions payable to salespeople
- The report only includes orders based on the date shipped

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Defining Client Territories

Client Territories define areas clients are associates with.

Example:

BOSTON, GEORGIA, NORTHWEST

To enter client territories

- Select Address at the top of the main menu
- Select Codes on the address screen
- Select the Territory button and the territory screen is displayed

The screenshot shows a software window titled "User Code". At the top right of the window are three buttons: "Add", "Delete", and "Close". Below the buttons is a table with the following structure:

	Territory		
	Code Type	Code	Description
▶ Select	Territory	BRO	
Select	Territory	DADE	
* Select			

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Defining Sales Territories

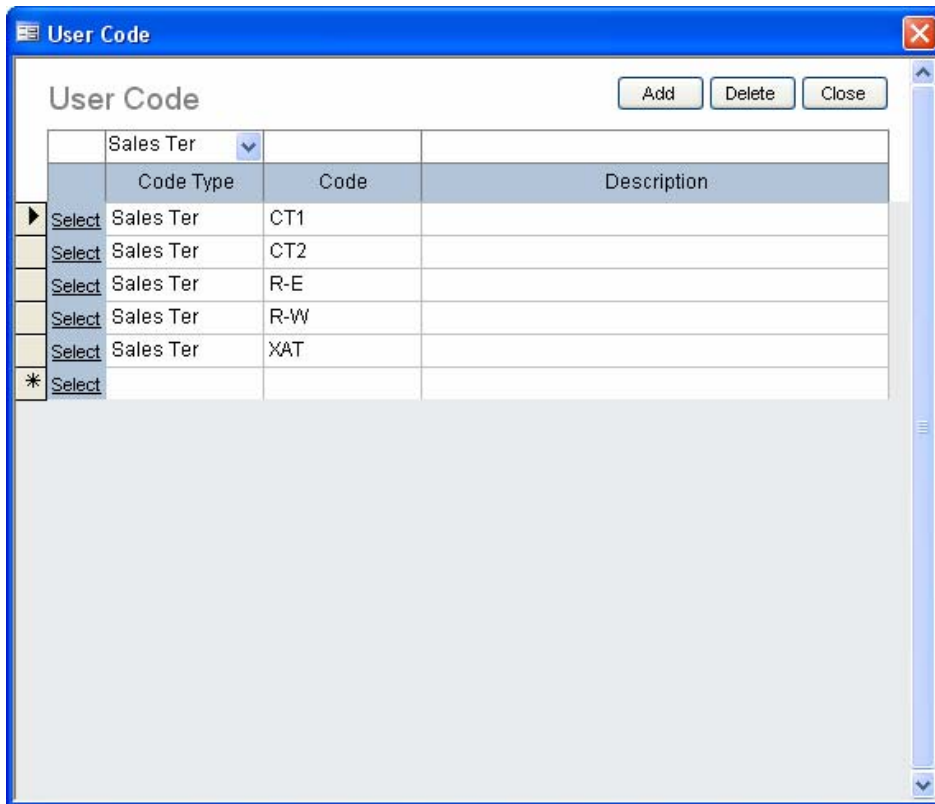
Sales Territories define areas clients are associates with.

Example:

MA, EASTFL

To enter sales territories

- Select Address at the top of the main menu
- Select Codes on the address screen
- Select the Sales Territory button and the sales territory screen is displayed



The screenshot shows a software window titled "User Code" with a blue header bar. Inside the window, there is a table with the following columns: "Sales Ter" (with a dropdown arrow), "Code Type", "Code", and "Description". The table contains five rows of data, each with a "Select" button to its left. The last row has a "*" before the "Select" button. At the top right of the table area, there are three buttons: "Add", "Delete", and "Close".

	Sales Ter	Code Type	Code	Description
Select	Sales Ter	CT1		
Select	Sales Ter	CT2		
Select	Sales Ter	R-E		
Select	Sales Ter	R-W		
* Select	Sales Ter	XAT		

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Defining Client Types

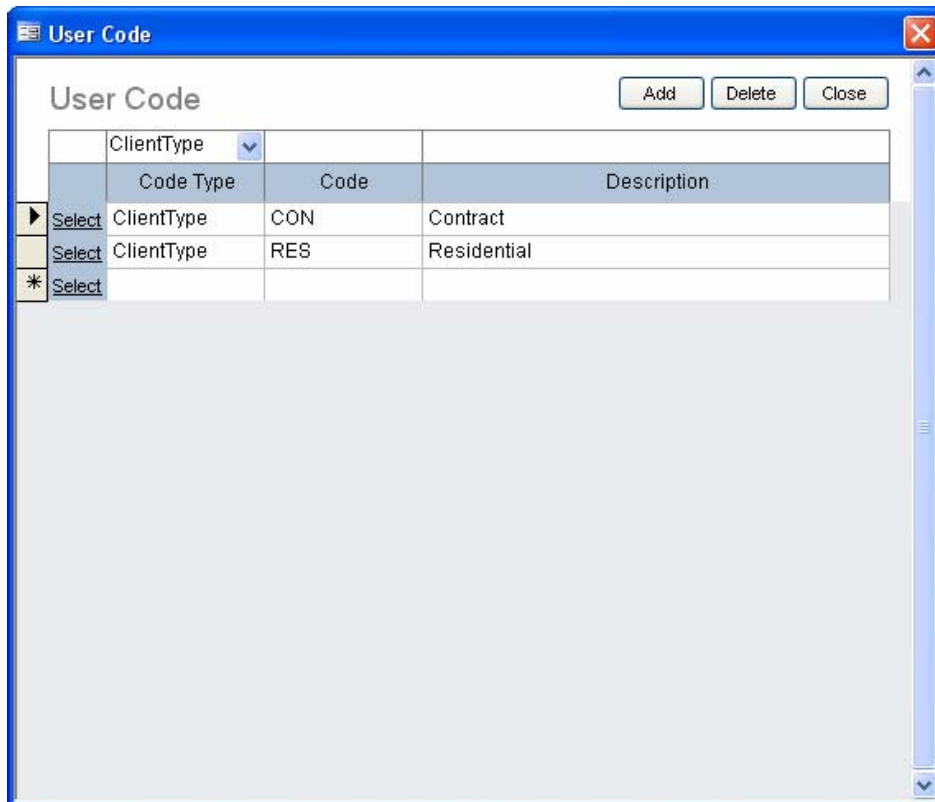
Client Types define types of clients.

Example:

RES, CON

To enter client types

- Select Address at the top of the main menu
- Select Codes on the address screen
- Select the Client Type button and the client type screen is displayed



The screenshot shows a window titled "User Code" with a table and three buttons: "Add", "Delete", and "Close". The table has the following structure:

	ClientType		
	Code Type	Code	Description
Select	ClientType	CON	Contract
Select	ClientType	RES	Residential
* Select			

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Defining Locations in Showroom

Locations in Showroom define the location that vendor products are placed in the showroom.

Example:

3RD, MAIN, BACK

To enter locations in showroom

- Select Address at the top of the main menu
- Select Codes on the address screen
- Select the Loc in Showroom button and the location in showroom screen is displayed

	Location	Code Type	Code	Description
Select	Location	4TH		
Select	Location	5TH		
Select	Location	CH		
Select	Location	HH		
* Select				

STUDIO SHOWROOM

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Attach Territories to Clients

Optionally attach a client territory or a sales territory or client type to a client.

To enter attach a territory to a client

- Select Address at the top of the main menu
- Select Codes on the address screen
- Select the Territory or Sales Territory or Client Type

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Address]". The window has a ribbon menu with tabs: Home, Address, Client Accounts, Quotes, Orders, Invoices, Reminders, Receipts, Checks, and G.L. The "Address" tab is active, displaying a table of client records. Below the table is a form for address details, divided into sections: Address F5, Codes F6, and Accounts F7.

Priority	F5	Address ID	Name	Email	Phone	Fax	Type	Active
Select	ARUDIN	A. Rudin	tom				Vendor	Yes
Select	BECKMANN	Barbara Beckmann					Vendor	Yes
Select	BIGFISH	Big Fish Art					Vendor	Yes
Select	CANYON	Canyon Concepts			720-530-5200	720-530-5200	Vendor	Yes
Select	DOUGLAS	Douglas Designs			949-820-6622	949-820-6622	Client	Yes
Select	EUROFAB	Euro Fabrics			305-774-2323	305-774-2325	Vendor	Yes
Select	GOLDEN	Golden Gate Upholstery			415-883-0560	415-883-0562	Vendor	Yes
Select	GOLDMAN	Goldman Interior Design			312-983-2155	312-983-2156	Client	Yes

Address F5

Salesperson: [Dropdown]
Sidemark: DOUGLAS
Resale #: RDOUGLAS
Resale Date: 7/18/2007
Attention: Jack
Code 1: [Dropdown]
Code 2: [Dropdown]
Territory: BRO
Sales Territory: CT1
Client Type: RES
Loc in Showroom: 4TH

Codes F6

Selling Discount %: 0
Purchase Discount %: 20
Commission %: 20
Mfg Bill: No
Ship Via Client: Best Way
Terms Client: Open Account
Freight Terms Client: Open Account
Ship Via Vendor: Best Way
Terms Vendor: 50% Deposit
Freight Terms Vendor: 50% Deposit

Accounts F7

Selling Taxable: No
Freight Taxable: No
Packing Taxable: No
Other Taxable: No
Tax Location: ATLANTA
Sales Tax %: 7
Alert: [Dropdown]
Entered By: [Dropdown]
Entered Date: [Dropdown]

Cash Account: [Dropdown]
Account #: [Dropdown]
1099: [Dropdown]
Federal ID: [Dropdown]
Social Security #: [Dropdown]
Phone Format: USA
Department: 01
Payment Vendor: DOUGLAS
FOB: [Dropdown]

Notes: [Text Area]

STUDIO SHOWROOM

Salesperson Commission by Territory

Attach Location in Showroom to Vendors

Optionally attach a location in showroom to a vendor.

To enter attach a location in showroom a vendor

- Select Address at the top of the main menu
- Select Codes on the address screen
- Select the Loc in Showroom

Priority	F5	Address ID	Name	Email	Phone	Fax	Type	Active
Select	ARUDIN	A. Rudin	tom				Vendor	Yes
Select	BECKMANN	Barbara Beckmann					Vendor	Yes
Select	BIGFISH	Big Fish Art					Vendor	Yes
Select	CANYON	Canyon Concepts			720-530-5200	720-530-5200	Vendor	Yes
Select	DOUGLAS	Douglas Designs			949-820-6622	949-820-6622	Client	Yes
Select	EUROFAB	Euro Fabrics			305-774-2323	305-774-2325	Vendor	Yes
Select	GOLDEN	Golden Gate Upholstery			415-883-0560	415-883-0562	Vendor	Yes
Select	GOLDMAN	Golnman Interior Design			312-983-2155	312-983-2156	Client	Yes

Address F5

Salesperson: Selling Discount %: Selling Taxable: No Cash Account:

Sidemark: DOUGLAS Purchase Discount %: Freight Taxable: No Account #:

Resale #: RDOUGLAS Commission %: Packing Taxable: No 1099:

Resale Date: 7/18/2007 Mfg Bill: No Other Taxable: No Federal ID:

Attention: Jack Ship Via Client: Best Way Tax Location: ATLANTA Social Security #:

Code 1: Terms Client: Open Account Sales Tax %: 7 Phone Format: USA

Code 2: Freight Terms Client: Open Account Alert: Department: 01

Territory: BRO Ship Via Vendor: Best Way Entered By: Payment Vendor: DOUGLAS

Sales Territory: CT1 Terms Vendor: 50% Deposit Entered Date: FOB:

Client Type: RES Freight Terms Vendor: 50% Deposit

Loc in Showroom: 4TH

Notes:

Salesperson Commission by Territory

Defining Salesperson Commission Chart

Define a record for each commission option for a salesperson.

To enter commission options for a salesperson

- Select Files
- Select Employee
- Select Show Commission

The screenshot shows a window titled "Salesperson Commission" with a table of commission records. The table has the following columns: Salesperson, Sales Ter, Territory, Client Type, Location, Vendor, Sales Code, Commission %, Date From, and Date To. There are two rows of data for the salesperson "DIAN".

Salesperson	Sales Ter	Territory	Client Type	Location	Vendor	Sales Code	Commission %	Date From	Date To
DIAN	CT1		RES				5	1/1/2007	
DIAN	CT2		RES				5	1/1/2007	

Define a separate record for each territory combination a salesperson has.

Salesperson Commission by Territory

Printing the Commission by Territory Report

The commission report can be printed at any time to determine commissions.

To enter print the commission report

- Select Reports
- Select AP Commission by Territory
- Enter the Ship Date From and Ship Date To