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How Do You Manage Salespeople?

Tammy Mason - 2022-07-20 - in Supervising

How Do You Manage Salespeople?



The ability to allow user access to a salesperson is also contained within the Salesperson resource. When the software is installed, all users will have access to all salespersons. If any changes to access are made within User Manage, they will already be reflected within a salesperson's resource. User salesperson access changes made either through User Manage or through the Salesperson's resource will work in conjunction with each other. There is no need to make changes twice.

Home Salespersons

New Copy Save Delete Cancel Close Views Edit

Code BKB Name Bob Keith Baker Status **Active** Employee

Commission Structure

Commission % 30.00% Based On Order Gross Profit % With Table (Select) Update Commission Rate

Commission Expense General Ledger 7003 Comm Exp/Salary Sales Per - bkb Edit

Primary Address

Address 1 1414 University Avenue Office +1 319-266-7426 Email Work BKB@asicomp.com

Address 2 Office Fax +1 Web Corporate www.asicomp.com

City Waterloo Other +1 Country

State/Province IA Zip/Postal 50701 Country UNITED STATES

Addresses (1) Phones (3) Emails (1) Websites (1)

Alternate Addresses (0)

Users With Access

<input type="checkbox"/>	User Name	Role
<input type="checkbox"/>	angelak	Administrator
<input checked="" type="checkbox"/>	Janedoe	User
<input type="checkbox"/>	SamSales	Salesperson
<input checked="" type="checkbox"/>	Tara	Customer Sen.

Lists/Lookups

Within lists and lookups that pertain to customers, quotes, orders, invoices, and salespersons, records will only be displayed if the user has access to a salesperson assigned to that record. Information pertaining to the accessible records will then be viewable (customer resource details, order details, invoice details, etc).

Order Manage Example: When launching Order Manage, the upper list will only contain orders to which the logged in user has access to any of the salespersons assigned to those orders. The user can then select an order to view the details of that order.

The screenshot displays the 'Order - 106' interface. At the top, there is a search bar and a filter set to 'This 6 Months'. Below this is a table listing several orders. The selected order, Order 106, is highlighted in green. Below the table, there are buttons for 'New', 'Copy', 'Import', 'Save', 'Delete', 'Cancel', and 'Close'. The main area shows details for Order 106, including the customer 'Covenant Medical Center', salesperson 'Jerry Ryan Sales', and status 'Open'. There are also buttons for '+ New Customer' and '+ New Invoice'. The bottom section is titled 'Order' and contains various fields for 'Bill To', 'Acknowledge', and 'Ship' information, including dates, names, and addresses.

Order	Bill To Name	Status	Products	Service	Contacts	Order	In Hand	Ship Date	PO/Reference	Primary Salesp	Customer Code	Costing
108	University of Northern Iowa	Open	(6)		(3)	02/01/2019			1-10644	Bob Keith Baker	UNI001	
107	University of Northern Iowa	Open	(4)		(3)	02/01/2019			10068	Bob Keith Baker	UNI001	
106	Covenant Medical Center	Open	(7)		(3)	01/16/2019	02/01/2019	01/29/2019	12345	Jerry Ryan Sales	CMC001	
105	Central State University	Open	(1)		(3)	01/15/2019	02/01/2019	01/28/2019		Cindy Renae Carmer	CSU001	

New Order Example: When adding/editing an order and viewing the customer and salesperson lookups, the user would only see customers and salespersons to which they have access.

Quote Lists - User will have access to a quote based on their access to salesperson(s) on the quote.

Order/Order Products/Customer Booked Lists - User will have access to an order based on their access to salesperson(s) on the order.

Order Costing List - User will have access to an order based on their access to salesperson(s) on the order.

Order Tracking Update - User will have access to an order based on their access to salesperson(s) on the order.

Invoice/Customer Sales Lists - User will have access to an invoice based on their access to salesperson(s) on the invoice.

Customer Open Receivables/Customer History Lists - User will have

access to all open receivables for a customer based on their access to salesperson(s) on the customer resource. Otherwise, the options may be totally restricted within User Roles.

Salesperson Open Commissions/Booked/Sales Lists - Access will be based on the salesperson(s) they have access to within their User Manage. Otherwise, the options may be totally restricted within User Roles.

NOTE: Menu options that you may never want a user to have access will continue to be restricted within the User role.

Links:

Within lists and views related to customers, quotes, orders, invoices and salespersons are various links. If the user clicks a link and they do not have access to the information loaded by the link, they will receive an "Access is restricted" message.

Example: Shown below is the Customer Invoices List for salesperson Alistair. All invoices are listed to which he is assigned. This list contains a link on the Salesperson column. However, Alistair does not have rights to view Salesperson Manage which is opened by clicking the link. If he clicks the link, he will receive the following restriction message:

The screenshot shows a software interface for 'Customer Invoices'. At the top, there is a search bar and a filter set to 'This Month' and 'Open'. Below this is a table with the following columns: Invoice, Bill To Name, Order, Status, Products, Contacts, Amount, Costing, Invoice D, PO/Reference, Primary Salesper, Customer Code, Package, and Consolidated. The table contains four rows of data for invoices 10478, 10477, 10476, and 10475. Below the table, a blue message box is displayed with the text 'Access to primary salesperson is restricted.' and an 'Ok' button.

Invoice	Bill To Name	Order	Status	Products	Contacts	Amount	Costing	Invoice D	PO/Reference	Primary Salesper	Customer Code	Package	Consolidated
10478	Brookside Veterinary Hospitz	659	Open	(10)	(2)	\$2,110.25		08/21/2015		Jane Doe	8604	(0)	<input type="checkbox"/>
10477	Brookside Veterinary Hospitz	655	Open	(1)	(2)	\$1,594.57		08/19/2015		Jane Doe	8604	(0)	<input type="checkbox"/>
10476	Dan Deery Toyota	654	Open	(3)	(2)	\$205.03		08/19/2015		John Smith (promos)	1000	(0)	<input type="checkbox"/>
10475	Covenant Clinic	650	Open	(2)	(2)	\$0.00		08/17/2015		Jane Doe	9000	(0)	<input type="checkbox"/>

Message

Access to primary salesperson is restricted.

Ok

User Role Additional Restriction Abilities

Additional restrictions to salesperson information within resources may also be designated within User Roles.

Example #1 - As all of the following options are checked, the user will have access to all information within the Salesperson expander.

Home ASIRole x

New Copy Save Delete Cancel Close

Role Name User

- Points Audit Transactions
- Commission Table**
 - Views
 - Edit
 - Lists
 - Sorted By Description
 - Commission Table Lookup
- CommissionTableTypes**
 - Lists
 - Commission Table Type Lookup
- External Orders**
 - Lists
 - Order Pending Approval List
- View Salesperson in Customer/Quote/Order/Invoice Resource/Program Resource**
 - Change Salesperson
- View Salesperson Commission %**
 - Change Salesperson Commission %
- View Salesperson Calculated On**

Sample of Example #1

Primary	Name	Commission %	Calculated On	With Table
	1400 Tina Fredericks	5.00%	Gross Profit %	Commission Table Based on GP%
	1000 Alistair Sturgis	55.00%	Sales Amount	(Select)

Example #2 - Based on the settings below, the user would only be restricted from seeing how the commission is calculated and the commission table.

Role Name User

- LISTS
 - Sorted By Description
 - Commission Table Lookup
- CommissionTableTypes**
 - Lists
 - Commission Table Type Lookup
- External Orders**
 - Lists
 - Order Pending Approval List
- View Salesperson in Customer/Quote/Order/Invoice Resource/Program Resource**
 - Change Salesperson
- View Salesperson Commission %**
 - Change Salesperson Commission %
- View Salesperson Calculated On**

Sample of Example #2

Primary	Name	Commission %
	1400 Tina Fredericks	5.00%
	1000 Alistair Sturgis	55.00%

Example #3 - The following user role is only allowing users to see the salespersons' names within salesperson expanders.

Role Name

LISTS

- Sorted By Description
- Commission Table Lookup
- CommissionTableTypes**
 - Lists
 - Commission Table Type Lookup
- External Orders**
 - Lists
 - Order Pending Approval List

Sample of Example #3

Primary	Name
	1400 Tina Fredericks
	1000 Alistair Sturgis

Sample of Example #3 within lists - If the user is restricted from seeing commission %s, the user will also not be able to view the commission amount column within Order and Invoice lists.

Home Customer Invoices

All Lists - All Invoices w/Comm

Invoice	Bill To Name	Order	Status	Products	Contacts	Amount	Cost	Invoice	Commission	PO/Reference
1000258	Word of Peace	100900	Open	 (3)	 (2)	\$13,962.22		03/14/2014	\$0.00	
1000257	AAA Michigan	100352	Open	 (1)	 (2)	\$249.50		03/14/2014	\$0.00	100352
1000256	Dubuque Greyhound Racing	100236	Open	 (1)	 (2)	\$1,981.47		03/05/2014	\$40.00	

Example #4 - The following user role restricts access to all salesperson information within salesperson expanders. If the user tries to click on a Salesperson expander, they will receive the following "Access Restriction" message.

Role Name

Lists

- Sorted By Description
- Commission Table Lookup

CommissionTableTypes

Lists

- Commission Table Type Lookup

External Orders

Lists

- Order Pending Approval List

Sample of Example #4

▼ **Products** (1)

▼ **Totals**

▼ **Salespersons** (2)

Access Restriction

Your role does not have access to this function