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Salesperson Master

Graphics Menu - Commission - Salesperson, Tree Menu - Masters/Codes - Maintenance - Salesperson Master

A salesperson master is set up for each person to whom you pay commission to or for whom you wish to accumulate booked and billed sales and cost information by order. The salesperson number field is a 4 digit numeric field.

Screenshot below - taken from Salesperson Maintenance

The screenshot shows a software window titled "Viewing Salesperson 11 - Tammy Rowe". The window has a standard toolbar at the top and a main content area with several tabs: "General", "Booked / Billed", and "E-mail / Fax". The "General" tab is active. The form contains the following fields and values:

- SJ #: 11
- Name: Tammy Rowe
- Active:
- SS #: 444-88-4488
- Comm %: 50.00
- Salesperson type: (empty)
- Comm tbl #: 0
- Comm type: 4P - Paid on paid - % of gross profit, incl. billing changes
- Accrued commission: 0
- Accrued comm reserve: 0
- Commission expense: 0
- Open orders: 0.00
- Comm paid: 0.00
- Non comm paid: 0.00

At the bottom of the window, there are buttons for "Add", "View", "Edit", "Delete", "Save", "Cancel", "Report", and "Close".

Commission Table

You may set up a commission table to base salesperson commission on the gross profit percent on each order.

Commission tables must first be set up in Commission Table Maintenance before you enter the table number.

The table number in the salesperson's master defaults into order entry but may be changed on each order.

Commission Type

The commission type indicates how the salesperson's commission is calculated. Each commission type consists

of two parts, a number and a letter.

Number Section-determines the type of calculation used.

1. Paid on percent of original sales value. Affected by changes made through order maintenance but NOT affected by any changes made while billing the order.

2. Paid on percent of original sales value. Affected by changes made through order maintenance AND any changes made during billing.

3. Paid on percent of profit on the original order. Affected by changes made through order maintenance but NOT affected by any changes made while billing the order.

4. Paid on percent of profit on the original order. Affected by order maintenance AND any changes made during billing.

***Note:** Percents for all commission types affect only line items, which have a commission Percent*

Active or Inactive

A reference field to indicate which salespeople are currently selling for you and those whose records you wish to keep but are no longer selling for you.

Booked Orders, Cost and Commission Amounts

Updated from orders, bill onlys and credit memos printed during the month but not available in the salesperson master until you run the Update Commission Journal.

The amounts which update the order and cost figures will depend on the sales / cost split % entered on each order. Salespeople who are paid on booked commission will also have the commission amount fields affected.

Commission adjustments made through the Adjustment program, for Booked salespeople, will affect the Booked information, if you wish.

Billed Sales, Cost and Commission Amounts

Affected by orders, bill only and credit memos which are invoiced during the month but not available in the salesperson master until you run the Update Commission Journal program.

Salespeople who are paid on billed or paid on paid commission will also have the commission amount

fields

affected.

Commission adjustments made through the Adjustments program, for Billed or Paid salespeople, will affect the Billed information, if you wish.

Open Orders

The open order balance is increased each time you enter an order and decreased each time you enter an order to be billed for that salesperson.

Note: If the salesperson master shows an open order amount that is not correct, run the Recalculate Open Order Balances option.

Comm Paid & Non-Comm Paid

The commission and non-commission amounts paid to each salesperson are updated by A/P checkwriting and stored in the salesperson's vendor master.

Adding a salesperson master automatically sets up a vendor master for each salesperson with the same number.

The salesperson's vendor master is used to issue a commission check and to store payroll tax information. An A/P open item is created for each order when the Update Commission Journal is run. Additional expenses may also be vouched to the salesperson's vendor # to affect future checks.

You may print a listing of your existing salesperson masters from within the Masters / Codes Reporting menu.

Commission Tables

Commission tables allow you to automatically change the commission percent on an order, based on the profitability of the order or billing.

Screenshot below - taken from Commission Table Maintenance

The screenshot shows a software window titled "Editing Commission Table 8 - Co. 20% Floor - %Pft". The window contains a form with the following fields and controls:

- Table #: 8
- Description: Co. 20% Floor - %Pft
- Table type: Gross profit % YTD sales
- Level maintenance: Add, Edit, Delete, OK buttons

On the right side of the window is a table with the following data:

Level	Begin GP%	End GP%	Comm %
1	0.00	20.00	0.00
2	20.01	21.00	4.76
3	21.01	22.00	9.09
4	22.01	23.00	13.04
5	23.01	24.00	16.67
6	24.01	25.00	20.00
7	25.01	26.00	23.08
8	26.01	27.00	25.93
9	27.01	28.00	28.57
10	28.01	29.00	31.03
11	29.01	30.00	33.33
12	30.01	31.00	35.48

At the bottom of the window are several buttons: Copy from, Add, View, Edit, Delete, Save, Cancel, Report, and Close.

When a commission table is assigned to the salesperson on an order, and all line items are entered, and you

click on Save, the gross profit percent for all commissionable line items, is calculated.

If the commission percent given to that GP% in the commission table is different than the commission percent

entered on the order, you will be prompted with a message window asking if you want the commission % on the

order changed.

Commission tables may be set up for different types of orders or individual salespeople. In addition, each commission table may be used for all salespeople to which it pertains.

A commission table number may be stored within each salesperson master. That commission table # then defaults into order entry for that salesperson but may be changed on each order.

You may print a listing of your existing commission tables through the Masters/Codes Reporting Menu.

Salesperson Tab

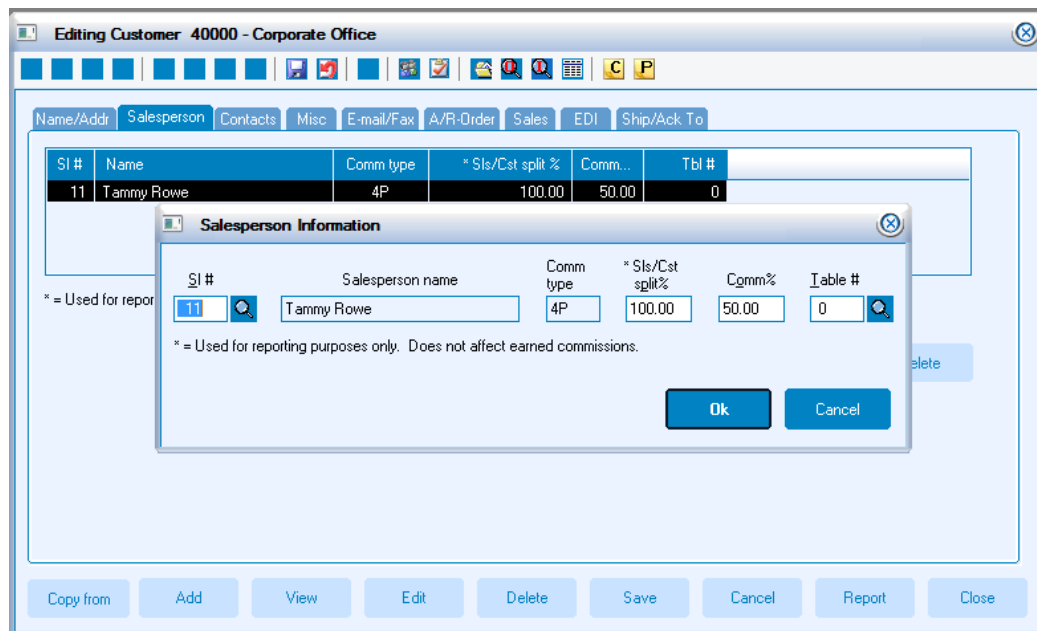
Customer Master, Order / Billing Order Info, Order / Billing Line Items

Each customer master may have up to 4 salespeople assigned to it.

The assigned salespeople will be filled in by default in order entry, but may be changed on the salesperson tab in

order entry/billing and also on the salesperson tab on each order line item.

Screenshot below - take from Customer Maintenance



The salesperson on line #1 is called the "Primary" salesperson and also displays on the customer master screen,

prints on the order and invoice, and some reports.

The sales/cost split percent for a salesperson determines how much of the order amount is updated to

their sales
and cost information in the Salesperson Master.

The split percent also determines the amount of sales and cost, which prints for this order on the Monthly Booked Orders, Monthly Billed Orders Reports, sorted by salesperson, and the Booked/Billed Comparison Report.

The sales and cost amounts updated to these files and reports reflect ALL line items, not only line items with commission assigned. The amount of sales and cost calculated at a percent other than 100% still reflects ALL line items.

The commission percent for each salesperson defaults in from the Customer Master and may be changed. This commission percent defaults into each order for this customer and may be also changed by line item if desired.

Note: A commission percent greater than zero *MUST* be entered if you use commission

tables to determine commission due on orders.