COMMISSION TRACK

Brandwise User Guide

[Draw your reader in with an engaging abstract. It is typically a short summary of the document. When you're ready to add your content, just click here and start typing.]

What is CommissionTrack?

CommissionTrack is used to setup Sales Rep territories, Vendor and Agency commission rules, enter invoices, and run commission reports. Based on territory and commissions setup, CommissionTrack will find the correct Sales Rep and commission payment when invoices are entered into the system. Invoices are batched and batches are closed at the end of each pay period so that reports may be generated to determine the pay to go to each Sales Rep for the pay period.

When used with ShowroomElite or VisualMerchandiser, this will provide a comprehensive analysis that allows for robust reporting such as Open Sales Order reports, as well as Open Invoice reports so your company can play a more proactive role in ensuring their customers receive their product and that their reps are paid for shipments going out to their customers.

Commission structures and territories as well as invoice entry and reporting will be covered during the initial Back Office Setup and Training. Prior to the setup of the system we will cover some basic information so that you can be sure that CommissionTrack is setup to meet the needs of your company's business practices. The areas we will cover are:

- Commission Control Data
- Territory Setup
- Sales Orders
- Reports

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Gaining Access to Commission Track

1. Locate SSCTRACK located in the ShowroomSolutions folder. Right-Click> Send to Desktop.
2. Before opening CommissionTrack, verify that the user have permission to access the application in ShowroomElite Menu Configuration:
    - Choose Menu Config in ShowroomElite
    - Select the User Group Definitions tab
    - Check the Enabled box for User can Login to Commission Track and Edit Key Commissions
    - Go to Personnel tab to assign user the this group

Menu Screen

From this screen you will be able to access all features of CommissionTrack. There will be six categories listed:

- Invoices
- Sales Orders
- Commission Control Data
- Territories
- Analysis & Reports
- Customers

Once a category is select, you will have more items to choose from. CTrack also allow you to use your keyboard throughout the system. For example, press the Menu Category number followed by the Menu Item number to open the application

Commission Control Data

Commission Control Data, which is option 3 on the Menu Category, allows the back office to set all default, rates, and rules that CommissionTrack will use to calculate commissions.

From the main menu, we will go to number 3. *Commission Control Data*>1. *Commission Configuration*. Each tab will play a vital part in your CommissionTrack setup. We will begin with the *Set-up and Defaults Tab.*

3. Commission Control Data>1. *Commission Configuration>Set-up and Defaults*

Use Sales Rep as order taker on direct sales orders

- Checking the box next to **Use Sales Rep as order taker on direct sales orders** will assign the territory rep as the order taker on the summary sales orders that are created when direct invoices are entered. If this flag is checked, the order taker on a direct order will be copied

from the sales rep of the customer. If left unchecked, the order taker will be the person that enters
the direct order.

Sales Rep Commission Type

- There are two **Setup Commission Type** options; *Standard* or *Vendor* Driven.
    - Standard rules will apply a flat rate commission split, based on Order Type, Vendor, and Sales Location on the invoice to the Commissionable Rep.
    - Vendor Driven rules allow for different rates to be applied to the invoice based on the rate received by the vendor to the Commissionable Rep.

Sales Order Rules for Direct Invoices

- The following are default values used when the system creates a **Summary Sales Orders for Direct Invoices**. These dropdowns allow you to set defaults for a direct invoice. When a direct invoice is entered, the summary order created will have the following default values:
    - Order Taker
        - Stored in SE/VM Personnel
    - Sales Source
        - Stored in SE/VM System Config
    - Sales Location
        - Stored in SE/VM System Config
    - Payment Terms
        - Stored in SE/VM System Config

Direct SO Commission Payment Rules

Direct Sales Order Rules may be applied to adjust commissions paid to the reps when the rules are broken for directs. Three options are available in the drop down; always pay the sales rep, Vendor Rules, and Rep Group Rules.

- Selecting *Always pay the sales rep* will ensure that the rep of record for a customer will always receive commissions on all directs entered into the system.
    - It will always pay the territory rep on a direct order.

- Selecting *Vendor Rules* will allow the Sales Rep commissions to be adjusted when a set number of consecutive direct orders without any rep orders written for a single customer and vendor are entered into the system.
    - It will look at the number of consecutive direct orders

  - Selecting *Rep Group Rules* will allow the Sales Rep commissions to be adjusted when a set period of time has elapsed since an order has been placed through the Brandwise system and a direct invoice is entered for a customer.
    - It will give the rep a specific number of days to write an order
  - Selecting *Charter Vendor Rules* specified vendors where direct order rules do not apply

Direct Invoice Date Configuration

- **Use Enter Date As Direct Order Date** if checked, the date that the invoice is entered will be that date on the direct summary order. If left unchecked, the date of the invoice will be the date on the direct summary order.

Balance Commission Payment By Checks

- When the **Balance Commission Payments by Check** box is checked the calculations made by Brandwise based on the vendor rates will be evaluated against the check amount received from the vendor to ensure that the system calculations are the same as the vendor calculations for commissions in a pay period. Commission Batches cannot be closed when the amounts do not match. Checks can be adjusted to create a zero dollar difference so that batches may be closed.

3. Commission Control Data>1. *Commission Configuration*>*Credit Reason Pick List*

Credit Reasons may be entered into the system for selection on negative invoices (credits) when the credit is entered into the system. If credit reasons are entered you may select certain vendors to force a credit reason selection at the time that the credit is entered into the system. These reasons will print on the Sales Rep Commission Statements.

- Place your cursor in the Credit Reason Description to type in your description
- Check the Default checkbox to make default
- Click the Red Box to delete the Credit Reason
- These credit reasons will display in a dropdown list on the invoice entry screen when a credit is entered. If reasons are added here, then one must be selected for each credit entered.

3. Commission Control Data>1. *Commission Configuration*>*Commission Payment Batch*

Commission Batches are used to group invoices together into payment periods. Commissions can be forecasted based on batches for verification and once a batch is closed, commission payment reports can be run to determine each rep's pay for the period.

The **Commission Payment Batch** tab is where your commission batches will be managed. There is no limit to the number of commission batches you can add in your system (monthly, weekly, bi-monthly, etc...) All open batches created here will display for selection when entering and paying commissions.

Adding a Commission Payment Date

- Place cursor in the white date field to add a batch date
  - mm/dd/yy format only

Note: Once a batch is closed, the data cannot be changed on an invoice payment. However, reports can be run for all history data.

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3. Commission Control Data>3.Rep Group Level Commission Rates>Rep Groups Information

Rep group commission rules consist of base agency commission settings, vendor commission rules, and rep commission rules. All rules are applied to an invoice when it is entered into the system. In this section, we will cover the need of a House Rep.

The house rep is additional personnel record that gets set as the default house account for invoices that are not within your company's territory. Commissions that cannot be assigned to a Sales Rep will go to the default house account. If applying Direct Sales Order Rules, a secondary default Direct House account can be used to track commission adjustments when the direct rules are broken. The House Rep can be setup within Showroom Elite under Personnel.

- **Find Reps Groups** will display in the yellow box on the left. The rep group is selected here will be the rep group linked to all four of these tabs.

- **Rep Group House Rep** is the rep that will be assigned to an order written for a customer NOT in a territory.

- **Rep Group Direct Invoice Rep** is the rep that will be assigned to a direct invoice when it is entered into the system. The users available in these dropdowns are users given the title of Sales Rep. If sales rep needs to be the house, a house rep will need to be created in ShowroomElite and given the job title of Sales Rep.

- **Rep Group Level Commission Sharing** allows your company to setup rules to share commissions with order takers. There are four choices for commission sharing options;
  - ***No Sharing***: If No Sharing is selected the main territory rep on a sales order will receive 100% of the rep commission percentage regardless of who is the order taker on the order.
  - ***With Order Taker (Always):***The order taker will always share commissions when they place an order for a territory rep if there is an order taker commission rule that applies to the order.

  - ***With Order Taker (Shows Only):*** The order taker will receive a commission share if the order taker is different than a sales rep on a sales order when the order type is Show.
  - ***With House (Shows Only):*** The order taker will receive a commission share if the order is for an out of territory customer and the order type is Show.

> ***Note:*** *Sharing takes place when a share method is selected, the order taker on the sales order is different than the commissionable sales rep, and both the order taker and commissionable sales rep allow commission sharing on their personnel record.*
>
> ***Note:*** *The sharing percentage can be pulled from either the house's share of commissions or the rep's share of commissions and the rate is determined based on the rules setup in the sales rep commission rates based on the rules setup in the sales rep commission rates.*

- ***Rep Group Level Commission Sharing for Direct Sales Orders*** will give the house a share of direct orders and the percentage will get entered here.

- ***Sales Rep Assignment*** option allows you to set who the commission goes to when a rep outside of the rep group writes an order.

- ***Commission Rep Must Be in the Rep Group on the Sales Order***
  - The rep will be determined by their rep group rules.
- ***All Reps Must be in the Rep Group on the Sales Order***
  - The house rep for that rep group will get the commission.

- ***Directs Not Paid Until Sales Rep Start Date*** will not pay on the Direct Orders until the the Sales Rep Start is set in the Personnel Record

3. Commission Control Data>3.Rep Group Level Commission Rates>Vendor Agency Rates

Vendor commission rates must be entered into the system. Each vendor can specify their own rate for each of the six sales order types; Road, Showroom, Show, Direct, Other, and Key. Rates are set as percentages against each type. When entering invoices into the system, the vendor rate and commission amount will be displayed on the invoice.

Adding Commission Rate to your Vendor

Vendors will display all active vendors for your rep group in the yellow box on the left. When a vendor is selected, the commission rates will be displayed on the right.

- Highlight the vendor to select

- Enter in a Start Date of the Commission Rate
- Enter in all rates for each sales type
- If all vendors have the same rates for all sales order types, enter in the rates for the first vendor and click *Copy Selected Rates to ALL Vendors*. This will fill in the same rates for every vendor in this rep group.

3. Commission Control Data>3.Rep Group Level Commission Rates>Sales Reps Commission Group Rates

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Sales Reps Commission Group Rates will set what the sales can receive since various rates based on several factors. Rates can be adjusted by Sales Order Type, Sales Location, or Vendor using the Standard Setup Commission Type. Using the Vendor Driven Setup Commission Type, rates may be adjusted by the rate received from the vendor as well as on a per vendor basis.

When setting up Sales Rep Commission Rates rules are added to Commission Groups. Reps are then each assigned a group so that your company does not have to create rules for each commissionable rep.

- **Commission Group Name** will add a new Sales Rep Commission Group. You are able to have multiple commission groups in the system. Once the name is entered it should show up in the yellow box on the left. This box will allow you to select which commission group you want to edit.

- Once a group is selected from *Select Commission Groups*, a start date can be entered. An end date is only needed if there is a known expiration date of commission group's percentage, or if a sales location is limited.

  Then enter the rate for every sales type:
  - ***Main Rep = Order Taker*** is the amount the rep will receive if they write the order for their customer.
  - ***Main Rep not = Order Taker*** is the amount the rep will receive if someone else writes and order for one of their customers.
  - ***Order Taker Share*** is the amount that the order taker will receive if it is not their customer. For this amount to calculate you must turn on order taker sharing. If the checkbox to the right of each order taker amounts is CHECKED, the order takers share will come from the house. If they are UNCHECKED, the order takers share will come from the rep.
  - ***3rd Rep*** is the amount that a third rep will receive. The third rep is the introducing rep and must be selected on the reps tab of the customer record.

- **Vendor/Sales Location Limit** is designed so you can limit these rules to a vendor and/or a sales location. If either of these limitations are set, the percentage will only be received is an order is for that specific vendor, or at that specific location, or both. For the example above, all reps in the commission group names General will receive 50% on orders for orders that are written at the Chi-Show, where they will only get 40%.

- **If the Rep Group Direct Order Rule is selected**, you will be able to enter the number of days allowed between direct orders for the commission group. This can also be limited for a vendor. In the example above, if a direct order comes in for PM Vendor, the rep will receive the commission, but then has 365 days to write an order for them. If the 365 days pass, and that customer writes another direct order, the person entering the direct will be asked if they want to take the commission from the rep and give it to the house. Once the rep writes an order for this customer, the days will reset.

Adding a New Commission Group

- Click ***Add New Sales Rep Commission Group***
- Edit group name in the *Commission Group Name* field
- Name of the new group will show in the *Select Commission Groups*

Adding New Commission Rates for a Commission Group

- Highlight the Commission Group to select
- Enter Start using mm/dd/yy format
    - End Date is optional
- Enter Sales Rep Percentage for each Sales Order Type

Optional

- Apply Rate for Main Rep not = Order Take
- Apply Rate for Order Takers Share
    - Checked: Share with Rep Group
    - Unchecked: Share with Main Rep
- Apply Rate for 3rd Rep
    - Checked: Share with Rep Group
    - Unchecked: Share with Main Rep
- Apply Vendor Limit
- Apply Sales Location Limit

Remove

- Click the Red Box on the right end of the Commission Rates to delete

3. Commission Control Data>3.Rep Group Level Commission Rates>Sales Reps

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The **Sales Reps** tab is to assign each rep to their correct commission group that was created in the previous section *Sales Rep Commission Group Rates.* It is also possible to set a *Change Date* when a rep will change from one group to another.

- **Rep Group Level Commission Group** will display what commission group the rep is currently assigned.
- **Change Date** will give you the ability to set a date that the rep will change from one group to another.
- **New Group Level Commission Group** will be the new commission group that the rep will be assigned when the date specified in the *Change Date* is reached.

- If there are multiple reps and every rep gets the same rate then you can select the correct rep group from this dropdown and click the corresponding option to apply the option to all groups.
    - Update all sales reps with a blank group to the selected group.
    - Update all sales reps to the selected group.
    - Clear all sales reps commission groups.

Assigning a Rep Group Level Commission Group to Sales Rep

- Select the Rep Group Level Commission next to the Sales Reps name or click on the yellow field containing the Reps Name
- Select the Rep Group that you want to assign to the Sales Rep

Optional

- Select Change Date to move the selected Sales Rep to a New Rep Group Level Commission Group
    - Once the date is reached, the sales rep will be moved the new group

3. Commission Control Data>4. Assigned Sales Rep Management

Sales Rep Management is a tool that will allow you to manage hard coded customers as well as change them from one rep to another.

- *Current Sales Rep* will select the rep whose hard coded customers you want to view.

- Next to the *Customer* in the blue header, you can review the customer assigned to the rep by clicking on the dropdown.

You also have the following abilities in the *Customer Record* located within ShowroomElite:

- *Sales Reps:* You can add a second rep to the Hardcode.
- *Divisions for Selected Rep*: You can limit the Customer Hardcode to a Division.
- *Vendors for Selected Rep*: You can limit the Customer Hardcode to a Vendor.
- *Remove Sales Rep* button will remove all sales reps from all customers that are not flagged as Limit to Sales Reps in the reps tab of the customer record.
- *Change Current Sales Rep to New Sales Rep* will move the hardcoded customer from the sales rep in the first dropdown and assign that customer hardcode to the rep in the second drop down.
- *Errors Only* is used when a customer is limited to the above sales rep but there is no rep selected, then the customer cannot be viewed. Click the *Errors Only* button to view theses records and fix them.

3. Commission Control Data>5. Sales Location Commission Rates

Sales Location Show Commission Rates is designed to give preferred commission rate to the rep based on a sales location and commission rate date range.

- **Sales Location** that are listed here are the locations that are entered in Showroom Elite Corporate Settings. Highlight the Sales Location to begin.
- **Sales Location Commission Rates** contains a dropdown to select the Vendor and enter in the different rates for that location and start and end date. Repeat for each location by selecting another vendor in the dropdown

> NOTE: This will only change the rate that the agency receives from the vendor. To change the split that the rep receives from the agency, based on location, go to the commission groups tab and limit to a sales location.

3. Commission Control Data> 6. Manufacturer Controls

The **Manufacturer Controls** section will give you the ability to *Monitor Credit Note, Set Max Consecutive Sales Orders and Unique Invoice Numbers.*

- **Monitor Credit Notes** if checked will provide a message each time a credit is entered for more than an invoiced amount. The message will refer to: We have received a credit memo against the following order that has been charged at a rate higher that the commission paid. The credit memo message will also provide Customer, Order, Invoice, and Commission information. You will also have 3 options to choose from:
    - *Accept This Credit Memo*
    - *Accept This Credit Memo and Print Report*
    - *Reject This Credit Memo and Print Report*

- **Max Consecutive Direct Sales Orders** will allow you to enter a number of consecutive direct orders allowed before the commission goes to the House account. For example, if you enter the number 2, then the third direct order for that vendor will go to the house. For this rule to apply, you must have the **Vendor Rules** selected in the *Direct SO Commission Payment Rule* drop down located in *Commission Configuration> Setup and Defaults*.

- *Tab* will provide you the ability to enter in only unique invoices. For each vendor that is checked, you will not be able to enter duplicate invoice numbers into the system.

    - If you enter and already used invoice number, you will receive message that the number already has been entered and it will allow you to print a copy on that invoice.

3. Commission Control Data> 7. Key Customer Commission Rates

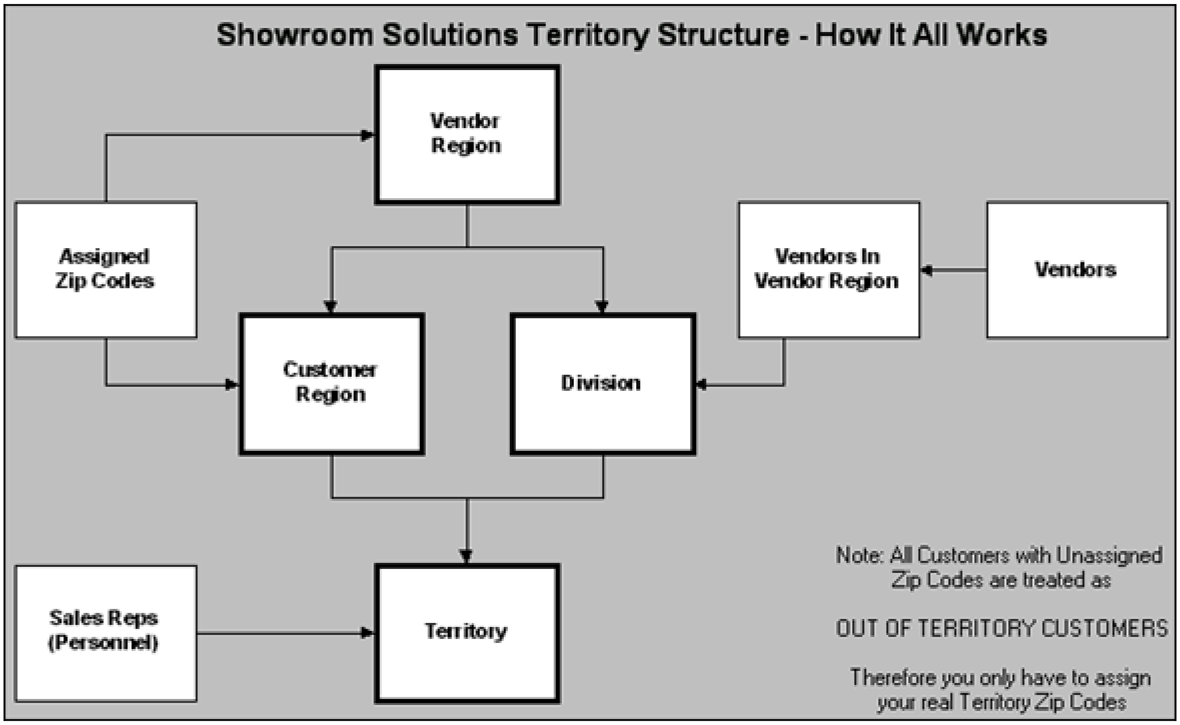
Key Customer Commission Rates will provide user defined commission rates for your key customers. You must select *Use Key Commission Rate* in the Reps tab in the Customer Record for all customers added in this section.

- Begin by searching for your Key Customer using name, address, zip code, or last four digits of their phone number.
- Select the customer from the Customer List by highlighting the Name/Address
- Select the Vendor that have a key rate for this customer the proceed to enter in the rates
- *Limit to Existing Key Customer* will show all customers that have a key rate for the selected Vendor.
- *Key Customers Flagged as Key for all Vendors* will display only customers that will have a key rate across all vendors.

Territories

The Territories section will manage the assignment of Sales Reps to sales orders and determines what information the Sales Reps can see on their local ShowroomElite or Visual Merchandiser application. It is very important that you go through each section to insure proper assignment of territories and zip codes to each sales reps. Territory assignment includes:

- Vendor Region
- Customer Region
- Divisions
- Territories
- Customer Types
- Customer Exception Assignment


Showroom Solutions Territory Structure - How It All Works
Vendor Region
Assigned Zip Codes
Customer Region
Division
Vendors In Vendor Region
Vendors
Sales Reps (Personnel)
Territory
Note: All Customers with Unassigned Zip Codes are treated as
OUT OF TERRITORY CUSTOMERS
Therefore you only have to assign your real Territory Zip Codes

4. Territories> 1. Territory Setup

Territory setup will allow you to complete the following steps must be completed to build your territory information:

- Step 1: Select your country that you will be selling in
- Step 2: Build your Vendor regions by selecting the appropriate zip codes
- Step 3: Build your Customer regions within each Vendor region
- Step 3: Build your Divisions for each Vendor Region
- Step 5: Assign Sales Reps to the appropriate Customer Region/Division

Country: This will assign the country that you are currently dealing with. If your territories span across multiple countries, then you must select that country to populate the zip code list used later.

Vendor Region: This is a geographical area of zip codes that represent a portion, or all of the area that an agency can sell into. You may have a single Vendor Region for your entire agency, or you may have multiple based on your specific needs. Each vendor region consists of the states/zip codes that are covered within the vendor region. A vendor region should be setup based on all territories that your agency has representation for all vendors for all territories/states.

Customer Region: This is based upon the zip codes that you have selected for a specific Vendor Region. The customer regions will break down your vendor regions into more detailed individual territories that will be managed by your Sales Reps. Each *Customer Regi*on can only consist of zip codes that are added to the *Vendor Region* section of the *Territory*. You many have a single customer region that represents the entire Vendor Region, or you may have multiple regions, again depending upon how your agency is setup. Typically, you want as many *Customer Regions* as you would Sales Reps with each region named after its geographical location such as East Montana, West Montana, etc.

Only one zip code can belong to ***Once Vendor Region*** and ***One Customer Region.*** If you have Sales Rep representing the same zip codes, please refer to Hardcoding the Reps in the Showroom Elite Backoffice Manual.

Vendor Division: This is a group of vendors that the agency represents within a given vendor/customer region. A vendor/customer region can contain any number of divisions. A vendor can belong to multiple vendor regions. Divisions are used when a vendor does not sell in all your customer regions. Then you would create multiple divisions with the appropriate vendor in each divisions

If a vendor is in multiple divisions within a single vendor/customer region, you must use either customer types on both your customer regions and divisions in order for the system to know who to assign the commissionable sales rep on the order or use the selling rep wins flag under the *Rep Group Level Commission Rules*.

Territory: A Territory is made up of 1 customer region and 1 division within a specific vendor region. If you have five customer regions and 3 divisions within a specific vendor region, the system will create fifteen territories. A sales rep can be assigned to any number of these territories. The sales rep can sell to customers (zip codes) within the customer region, and can sell all products defined within the division that make up their Territory, unless overrides exist on the customer record using hardcodes.

Customer Type: Customers can be grouped by customer type and then the customer type can be assigned to a division. The commission Customer Types are not to be confused with the Reporting Groups in Showroom Elite which are used to categorize your customers. The Customer Type will verify who the territory rep is.

Building your Territories

Step 1: Build your Country

Begin by selecting the country that you and your vendors will be dealing with. You can have multiple countries selected. This will build your Zip Code structure. For example, if you sell your products in Canada, you will Canada selected to assign the zip codes in the *Vendor Region* and *Customer Region.*

Step 2: Build your Vendor Regions by selecting the appropriate zip codes for each region

- Begin by adding your Vendor Name to the *Vendor Regions*
    - Click in the available Name field and type in the name
    - Highlight the name when add/editing zip codes
- To add zip codes to the region, click ***Add Zip Codes/Postal Codes.***
- From the new ***Add Zip Codes/Postal Codes*** window, you may narrow your search results by the following:
    - State/Province
    - City
    - Zip Postal Code Range
- Once you have selected the search criteria, click ***Get Zip Codes.*** This will populate all zip codes that are available and are not assigned to other Customer Regions in the lower blue screen.
    - Use Keyboard Shift and Mouse Left Click to highlight and select a range of zip codes.
    - Use Keyboard Ctrl and Mouse Left Click to add multiple single line zip codes.
- Once the desired zip codes are highlighted, click the ***Add Selected Zip/Postal Codes.***
- The added zip codes will now be displayed in the yellow section of the Vendor Regions
- When finished adding zip codes the region, click ***Close*** and proceed to the next tab.

Step 3: Build your Customer Regions by selecting the appropriate zip codes assigned in Vendor Region

- Begin by typing in name of the region or territory. Any naming convention can be used to best describe the region e.i West Montana, East Montana. You are able to add/edit these names at any time
- To add zip codes to the region, click ***Add Zip Codes/Postal Codes.***
- From the new ***Add Zip Codes/Postal Codes*** window, you may narrow your search results by the following:
    - State/Province
    - City
    - Zip Postal Code Range
- Once you have selected the search criteria, click ***Get Zip Codes.*** This will populate all zip codes that are available and are not assigned to other Customer Regions in the lower blue screen.
    - Use Keyboard Shift and Mouse Left Click to highlight and select a range of zip codes.
    - Use Keyboard Ctrl and Mouse Left Click to add multiple single line zip codes.
- Once the desired zip codes are highlighted, click the ***Add Selected Zip/Postal Codes.***
- The added zip codes will now be displayed in the yellow section of the Vendor Regions

Managing Zip Codes

You are able at any time to remove or move any zip code in the yellow field. This will either add the zip code back into the regions zip codes, to be added later, or transfer the zip codes to another region.

- Begin by selecting your Vendor or Customer Region name.

- Select the individual zip code or zip code range that needs to be removed.
- You have 2 options:
  - Remove Selected: This will remove the zip code from the yellow section to be added back into the zip code available
  - Move Selected: This will transfer the zip code to your selected region.
    - Move selected will give you instructions and a drop down of available regions that you can transfer zip codes into.

Zip Code Information

The Zip Code Information button located on the bottom of each Region section will provide valuable information about that zip code. Please refer to 4. Territories>5. Territory Zip Code Information for further details.

- Enter in the zip code in Find Zip Code and click on ***Get Sales Rep Rule.***
- This will display all territories, divisions, and sales reps assigned to that zip code.
  - If blank, then that zip code needs to be assigned to a region and a sales rep.

Step 4: Build your Divisions

- Begin by typing in name of the division. Any naming convention can be used to best describe the division. Add the selected division to the appropriate rep group. Select Customer type if needed for each divisions

- From the Vendors In section, select the vendor that belongs to the highlighted division. Vendors can belong to multiple divisions.
  - ***Add All Active Vendors to above Division*** will add all your active vendors to the highlighted division
  - ***Copy Vendors from*** will copy all vendors from the selected division name
  - ***Delete All Vendor from above Division*** will remove all vendors from that division

Step 5: Assign Territories to Sales Reps

- To view all territories, you will need to select Active, Inactive, or ALL from the ***Status*** dropdown located at the bottom of the page. This will show all your territories that need to be assigned to a Sales Rep. If you don't see the Sales Rep, please refer to the Personnel section of the Showroom Elite Backoffice Manual.
  - If you have two divisions then there will be two options for each customer region. You do not have to activate all territories, only the ones where the divisions can be sold.
- Once you selected the appropriate Sales Rep to each Customer Region/Division, you can also enter in a territory name and select a new sales rep to take over on a certain date.

Step 7: Customer Type

Customer Type is where you can create Customer Types. You can add them to a division in Step 4 of this section. If types are added to divisions, then the customers that fall into those type need to be assigned under the reps tab in the customer record located in Showroom Elite.

Begin by adding the Customer Type name in the available description field.

Step 8: Territory Reports

Reports will allow you to run specific reports based on your current territory setup.

- Out of Territory Customers
    - Display all Customers not assigned to region
- Out of Territory Zip Codes
    - Display all zip codes not assigned to a region
- Zip Codes in Vendor Region but not in a Customer Region
    - Displays all zip codes not assigned to a Customer Region but exist in the Vendor Region

4. Territories> 3. Customer Type Management

Customer Type Management gives you the ability to manage your customer type assignments defined in Territory Setup. For example, you can assign all your customers into the 'Gift' customer type.

- There are two actions that you can perform from the Customer Type Management screen:
    - By clicking on ***List Customer,*** you will list all customers by the options that are selected.
    - You can select any or all customers in the list below and choose a type in the top right. Then by clicking ***Update Customer***, all of the customers will be assigned to the customer type.
-

4. Territories> 4. Zipcode Editor

The **Zip Code Editor** will list all know zip codes for the criteria chosen in the upper right. Zip Codes that do not exist in the system can only be added here. You can only edit zip codes that have been entered by a user.

If a zip code is not in the system, you will get an error message stating that it 'Cannot Find Zip' while entering a new customer. You can still add the customer to the system, but the zip code will need to be added to the system using the Zip Code Editor. When this is done, you can assign that zip code to the appropriate Vendor and Customer Region.

Search for Zip Codes

- Select the Country in the upper right Display Criteria
- Limit the zip/postal code by state or province
- Search for Zip/Postal Code to limit to specific zip code
- Check 'Display Master Records Only' to limit to Brandwise Default Zip Codes list
- Check 'Display User entered Records Only' to display all records that where manually created

Adding Zip Codes

- Use Display Criteria to limit the Zip Code Editor to the appropriate State
- Scroll to the bottom of the list to the available blank field
- Enter in the appropriate Zip Code, City, Type, and State.
- Check Entered By User

4. Territories> 5. Territory Zip Code Information

The **Territory Zip Code Information** section allows you to view all zip code information associated with a certain zip code.

- Territory zip code information will display on this screen when you have entered a zip code in the bottom left field, Find Zip Code. Click ***Get Sales Rep Rule*** to display the information about that zip code.
    - If no information returns, then that zip code is our of territory and need to be assigned in the Vendor and Customer Regions.
- You can limit the displayed information by Rep Group or Vendor.
- You can also change the assigned rep for the Sales Rep drop down
- If you make any changes, click ***Update Pending Changes*** to apply any rep changes made to the screen.

4. Territories> 8. Determine Sales Rep

The **Determine Sales Rep** section will show you which sales rep will get credit for a specific order scenario by using predetermined criteria.

- Select Vendor, Customer, Order Taker, and whether or not it is a Show Order, then click ***Determine Sales Rep*** and you will see the results. You can also click ***Display All Possible Sales Reps*** to see those as well.

Invoices

The Invoice section will allow you to enter in all invoices provided by your vendors to be entered in against all sales orders written in the Brandwise system. You are able to look up all invoices entered in the system, enter in new invoices, and make all necessary internal corrections if needed.

1. Invoices> 1. Invoice Menu

The **Invoice Menu** will allow you to look up all invoices that have been entered in the system. In the top portion of the screen, you will be able to choose the following criteria to search for invoices:

- **Search Limits:** This will limit your searches by
  - **Rep Group**
  - **Vendors**
  - **Other:** Can be a user defined search files, such as PO# or SO#

Additional Search Limits:

- **With Errors Only**
  - Allows you to view any invoices marked for pay that has errors
- **Data Range**
  - Allows you to select a date range to search
- **Invoices**
  - You can limit to ***Paid, Not Paid,*** or ***Both***

Note: You can view all invoice data from this screen. To edit the invoice to make changes, you must double click on that invoice to open it.

All of the option at the bottom will navigate you to helpful information:

- **Edit Invoice**
  - This will allow you to view the invoice
- **View Sales Order History**
  - This will open the order for your to view the order information
    - The sales order information will display:
      - Header Details
      - Line Items
      - Invoice Information
- **Assigned Sales Rep Rules**
  - This will open the zip code information screen located in 4. Territories > 5. Territory Zip Code Information
- **Print**
  - Print the ***Invoice Menu Report***
    - ***Partial Data***
    - ***All Data***

1. Invoices> 2. Enter New Invoices

The **Enter New Invoice** menu, you will be able to enter all your vendor invoices in the Commission Track system. There are several shortcuts that can be used during the invoice entry to streamline the process.

- Start by selecting your Rep Group if you have multiple Rep Groups in your system
- Select your Vendor that you need to enter invoices for into the system

Entering in Invoices:

- Start by entering a new invoice by typing in the ***SO Number, PO Number,*** or ***Invoice Number*** of the order that you wish to place the invoice against.
    - If you cannot find the order, you can click on the ***Detail Search***. The detail search will allow you to search by customer, vendor, territory, and dollar amount
    - If you know that this a Direct Invoice, then you will click on ***Create Direct Invoice.*** You will be asked to find the customer, select a vendor, and enter the invoice. A summary sales order will then be created for that invoice
- Invoice Automation will allow you to streamline the way you enter invoices into the system. Each box that is checked will do the following to each invoice entered into the system:
    - **Use Last Invoice Date**
        - The system will apply the date entered form the previous invoice if you have a batch of invoices with the same date. This will eliminate the need to enter in a date for each invoice entered into the system.
    - **Use Last PO Number**
        - The system will apply the invoices to the same PO Number
    - **Use Last Invoice Amount**
        - The system will apply the invoice amount from the previous invoice entered. The is common when receiving invoices for a chain store shipment
    - **Pay Commission Mode**
        - The system will mark the invoice as 'Pay Commission'. If this is checked, it will eliminate the need to go into the Commission Payment to pay the invoices.
            - **Default Payment Date**
                - If the system is set to pay by month, then you can select the month for the invoice to be paid
            - **Default Commission Check**
                - If you care using the 'Balance Against Check' feature, then you can select the check to apply the commission payment against for the invoices being entered

Note: Using wild cards in searching for PO Number and Invoice Number:

- Use * for multiple wild card characters
- Use % for single wild card character

Invoice Screen

Once you have entered in your invoice information against the Sales Order, the Invoice Screen will appear. This screen will also give you details about that sales order.

- Start by entering the following invoice information into the Invoice section
    - Invoice Number
    - Invoice Amount
    - Invoice Date

Once that is complete, the commission payout will automatically be calculated based on all the commission rules set by the system.

- The **Commission payou**t sections will display the following information
    - Commission Percentage
    - Commission Amount
    - Sales Rep Name
        - Main Rep
        - Sharing Rep
        - 3rd Rep
    - From Rep $
    - From Group $

The invoice screen also contains shortcuts that can be used to access helpful information.

- **Invoice Section**
    - New Invoice
    - New Invoice for Same PO
    - Update Rep Group
    - Get Sales Order
    - Assigned Sales Rep Rules
        - Will open the Assigning Sales Rep Rules
            - Displays Territory Sales Reps
            - Displays Sales Rep Assigned directly to the Customer
- **Commission Section**
    - Internal Correction
    - Check Errors

Internal Corrections

An internal correction will generate an adjustment on the sales reps commission statement for both the rep this is being changed and the new rep that is being paid. Internal corrections will only open for invoices that have been paid.

- **Existing Commission Payment**
    - This section displays how the *Original Invoice* was paid
- **Reversal Commission Payment**
    - This section is the reversal on the original record. Select the commission month that you want the reversal to reflect
- **Replacement Commission Payment**
    - This section is the new fixed record. Select the correct sales rep to be paid or make adjustments to the sales rep commission rates

Note: You cannot change the rate or dollar amount received from the vendor. This amount cannot be changed once the commission has been posted for the month.

The invoice will display all changed made during the internal corrections.

1. Invoices> 4. Vendor Commission Check Register

The **Vendor Commission Check Register** will allow you to enter in commission checks from your vendors upon receipt. It is recommended that you create a Commission Batch to apply all your invoice checks against.

- Select the vendor from the upper left and then enter in the check on the first available line.

Note: Vendor checks can be entered at any time, however internal check balancing must be enabled from the Commission Configuration screen.

1. Invoices> 4. Commission Payment

The **Commission Payment** menu will allow you to reconcile invoices that vendors have submitted for payment to the agency and commissions that the sales rep will receive.

Paying Commissions

- Select the vendor that you want to process commissions
    - You can also select All Vendors

- Select the commission batch created date that your invoices will be in
    - These dates are created in Commission Configuration
- Select a check to pay the commission from the Vendor Check #
- Check the Pay checkbox located in the Invoice section to add all invoices what will be paid in this batch
    - These invoices will remain checked as ***PAY*** until the batch is paid
- Enabling Search Mode will automatically put the focus on the ***PAY*** checkbox
    - ***Keyboard Shortcuts***
        - Spacebar: Check/Uncheck
        - Arrow Keys: UP/DOWN to navigate
- If Balance Commission Check is enabled, then you view the outstanding amount in ***Remaining Amt***
- Print Register and Print Check Register will allow you to sort and print the check register
- When you are ready to pay commissions, click on the ***Pay Commission***
    - This will open the Pay Commission screen

Pay Commission

- You must select a pay date from the dropdown to display the figures. These dates will be the available batch dates
- Click ***Pay Commission***
- If you are using Balance Commission Check and the checks are balanced, you will receive a message confirming the commission payment. Click ***Continue***
- All invoices for that batch have now been paid

If the check does not balance, you will get a message stating that Some Vendors cannot be paid, please correct. You can now enter in an adjustment on the check if you want it to balance with the batch.

- Double click on the check listed
- The Check Register Adjustment Editor will appear
- Enter in the following information
    - Adjustment Amount
    - Adjustment Reason
    - Approved By
- Click Close
- The check will now balance the batch
- Click ***Pay Commission***

2. Sales Orders> 3. Close Sales Orders

Closing Sales Orders will allow you to close sales orders based on order rules set up in the Vendor Setup tab. Check each criterion that you want to close sales order by and click ***Close Sales Orders.*** You can also click ***Create Sales Order to Close Preview List*** and then got to the Preview Sales Order tab to view those orders.

Vendor Setup Tab

- **Process Back Orders**
- **Process Cancel Date**
- **Invoice Difference**
- **Sales Order Age**

> *Note: Each rule only needs to be setup once. The system will save all rules so that you can just check the criterion on the Sales Order Action tab and click* ***Close Sales Orders.***

5. Analysis and Reports>2. Reports

The **Reports Menu** in Commission Track contains reports based off of the data in the Commission Track system. Reports can only be run on the 100 server, workstations will not see reports.

Commission Forecast

Will allow you to run reports on reps and vendors for commission batches already paid out in the system.

Sales Reps

Will allow you to run reports on reps such as: activity, unpaid commissions, commission summary by vendor and sales rep ranking.

Vendor

Will allow you to run reports such as: sales order to invoice comparison, unpaid invoices, vendor ranking, and direct orders analysis.

Customer

Will allow you to run reports such as: customer ranking, sales by zip code, customer by territory, and customers assigned to sales reps.

Administration

Will allow you to run reports on customer and vendor regions as well as territories

New Reports
The reports are the newest reports and will report on invoices with changed commission and target forecasts.

Common Tasks

Paying Commissions
Adding a Sales Rep
Adding a New Vendor to a Division
Closing Sales Orders
Moving Zipcode
Creating Invoice

Troubleshooting

Finding Zipcode assigned to a Rep
Hardcodes
Invoice Adjustments
Cannot open Commission Track