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Introduction – Sales Commission

The Autologue Sales Commission Reporting software is designed to track sales by salesman code for user-defined categories. Users define category numbers and specific product lines to be included. Specific product lines cannot be defined in more than one category! Salesman codes must also be setup within the customer records. Once this information is setup, sales and receipt amounts by category will be tracked in a database. This information can then be reported by salesman code, invoice number, category amounts, etc.

Setting Up Sales Commission Categories

To start setting up and maintaining sales commission category information, follow the steps below:

- From the *Autologue Main Menu*, enter **11** (*Report Processing*) and press **<Return>**.

- From the *Report Processing Menu*, enter **18** (*Custom Reports*) and press **<Return>**.

The *Sales Commission Custom Report Menu - Quick Menu* screen will now be displayed as shown:

```
+-admin-------------------------------------------------------------1 of 1--+
|                  SALES COMMISSION CUSTOM REPORT MENU - Quick Menu          |
+---------------------------------------------------------------------------+



                   --> 1. CATEGORY MAINTENANCE SCREEN

                       2. EXPORT DATA

                       3. PACK DATA BASE

                       4. PURGE DATA BASE

                       5. RUN REPORTS




+-Tue Jun 18 16:52:26 19XX----------------------------------------(Q)uit--+
|             TO CREATE AND EDIT CATEGORY GROUPS (or Q to quit)            |
+---------------------------------------------------------------------------+
```

- From the *Sales Commission Custom Report Menu*, enter **1** or use the ⬆ and ⬇ arrow keys to position the **-->** pointer on the **1. CATEGORY MAINTENANCE SCREEN** menu selection and press **<Return>**.

The *COMMISSIONED SALES Category Maintenance* screen will now be displayed as shown:

```
                    ┌────────────────────────────────────────────┐
                    │  COMMISSIONED SALES Category Maintenance  │
                    └────────────────────────────────────────────┘

        ┌──────────────────────────────────────────────────────────┐
        │                                                          │
        │  Category: █_                                            │
        │                                                          │
        │  Category Description:  _____         │
        │                                                          │
        │  Product Lines In Category:  _____     │
        │                                                          │
        │                                                          │
        └──────────────────────────────────────────────────────────┘




         F1 RESET      F4 DELETE      F8 NEXT      F9 PREV      F10 SAVE      F11 EXIT
```
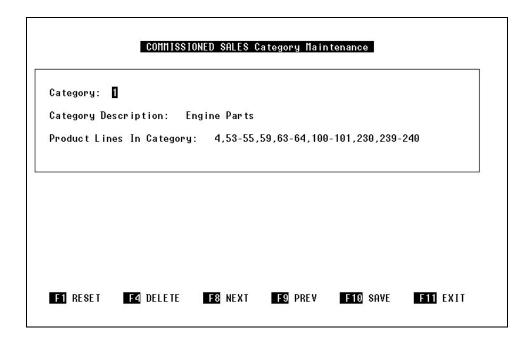
This screen is used to enter a new sales category or edit/delete an existing category.

Entering A New Category

- With the cursor positioned at the **Category:** prompt, enter a numeric category number between 1 and 999 and press **<Return>**.

- With the cursor positioned at the **Category Description:** prompt, enter a description of the category and press **<Return>**.

  The category description allows for up to 29 printable characters.

- With the cursor positioned at the **Product Lines In Category:** prompt, enter the product lines to be included in the category and press **<Return>**.

  For a single product line, the user would simply enter the product line number. For a range of consecutive product lines, the user would enter the first product line number, a dash, and the last product line number. For combinations of both a single and range of product lines to be included, the user would entered a comma between the single and ranges of product lines.

  Example: **4,53-55,59,63-64,100-101**

☞ **Note: Spaces are not allowed when entering product lines! Each product line number can ONLY be assigned to ONE category! The screen will display an error message if a product line being entered is already assigned to another category.**

- Press the **<F10>** (*Save*) key to save the entered category information.

```
                 ┌──────────────────────────────────────────┐
                 │ COMMISSIONED SALES Category Maintenance │
                 └──────────────────────────────────────────┘

        ┌─────────────────────────────────────────────────────────────┐
        │                                                               │
        │  Category:  ▌                                                 │
        │                                                               │
        │  Category Description:   Engine Parts                         │
        │                                                               │
        │  Product Lines In Category:   4,53-55,59,63-64,100-101,230,239-240 │
        │                                                               │
        │                                                               │
        └─────────────────────────────────────────────────────────────┘




             F1 RESET      F4 DELETE      F8 NEXT      F9 PREV      F10 SAVE      F11 EXIT
```

Editing An Existing Category

- With the cursor positioned at the **Category:** prompt, enter the category number to be edited and press **<Return>**.

    The screen will now display the category description and product lines setup.

- With the cursor positioned at the **Category Description:** prompt, enter a new description for the category and press **<Return>** or just press **<Return>** to skip past the description.

- With the cursor positioned at the **Product Lines In Category:** prompt, enter the product lines to be included in the category and press **<Return>** or just press **<Return>** to leave the assigned product lines.

    Example: **4,53-55,59,63-64,100-101**

- Press the **<F10>** (*Save*) key to save the entered category information.

- Press the **<F1>** (*Reset*) key to clear the screen information and position the cursor at the **Category:** prompt.

Deleting An Existing Category

- With the cursor positioned at the **Category:** prompt, enter the category number to be deleted and press **<Return>**.

    The screen will now display the category description and product lines setup.

- Press the **<F4>** (*Delete*) key to delete the category record information.

    The screen will automatically display the first category record information after the deletion is completed.

- Press the **<F1>** (*Reset*) key to clear the screen information and position the cursor at the **Category:** prompt.

Scrolling Through Existing Category Records

- User can scroll forward or backward through category records by pressing the **<F8>** (*Next*) or **<F9>** (*Prev*) keys.

Exporting Sales Commission Data

- From the *Sales Commission Custom Report Menu*, enter **2** or use the ↑ and ↓ arrow keys to position the **-->** pointer on the **2. EXPORT DATA** menu selection and press **<Return>**.

Packing The Sales Commission Database

- From the *Sales Commission Custom Report Menu*, enter **3** or use the ↑ and ↓ arrow keys to position the **-->** pointer on the **3. PACK DATA BASE** menu selection and press **<Return>**.

Purging The Sales Commission Database

- From the *Sales Commission Custom Report Menu*, enter **4** or use the ↑ and ↓ arrow keys to position the **-->** pointer on the **4. PURGE DATA BASE** menu selection and press **<Return>**.
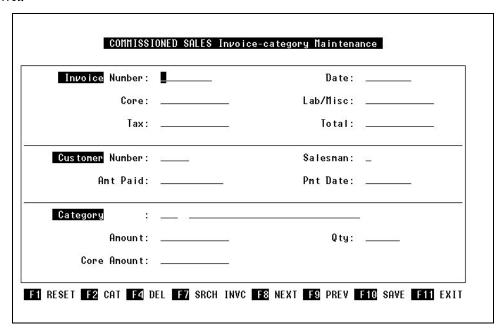
Running Sales Commission Reports

- From the *Sales Commission Custom Report Menu*, enter **5** or use the ↑ and ↓ arrow keys to position the **-->** pointer on the **5. RUN REPORTS** menu selection and press **<Return>**.

The *Commissioned Sales Report* screen will now be displayed as shown:

```
                    ┌──────────────────────────────┐
                    │  COMMISSIONED SALES REPORT    │
                    └──────────────────────────────┘

          Report: _____
      ┌─Select─Report─────┐
      │ 1) Invoices        │   Only (Y/N): _
      │ 2) Receipts        │
      │ 3) Aged Invoices   │                        Output To:  SCREEN
      └────────────────────┘
          Date Range: _____ To: _____

          Category: _____

          Customer: _____  Cust Report Codes: _____

          Invoice: _____  Invoice Age: _____


    F1  RESET  F2  SEL CAT  F3  SEL AGE  F4  PRINTER      F10  PRINT  F11  EXIT
```

Entering Sales Commission Invoice-Category Records

- From the *Sales Commission Custom Report Menu*, enter **?** or use the ⬆ and ⬇ arrow keys to position the **-->** pointer on the *?. INVOICE CATEGORY MAINTENANCE SCREEN* menu selection and press **<Return>**.

  The *Commissioned Sales Invoice-Category Maintenance* screen will now be displayed as shown:

```
                    ┌──────────────────────────────────────────────┐
                    │ COMMISSIONED SALES Invoice-category Maintenance │
                    └──────────────────────────────────────────────┘

        Invoice Number: ▮_____              Date: _____

               Core: _____           Lab/Misc: _____

                Tax: _____              Total: _____


        Customer Number:  _____             Salesman: _

            Amt Paid: _____             Pmt Date: _____


        Category        : __  _____

            Amount: _____                  Qty: _____

        Core Amount: _____


    F1 RESET  F2 CAT  F4 DEL  F7 SRCH INVC  F8 NEXT  F9 PREV  F10 SAVE  F11 EXIT
```

This screen is used to enter a new sales commission invoice record or edit/delete an existing record.

Entering A New Sales Commission Invoice Record

- With the cursor positioned at the **`Invoice Number:`** prompt, enter the invoice number (1-65535) and press **`<Return>`**.

- With the cursor positioned at the **`Date:`** prompt, enter the invoice date (MM/DD/YY) and press **`<Return>`**.

- With the cursor positioned at the **`Core:`** prompt, enter the core dollar amount and press **`<Return>`** or just press **`<Return>`** to default the field to a value of **`0.00`**.

- With the cursor positioned at the **`Lab/Misc:`** prompt, enter the labor/miscellaneous dollar amount and press **`<Return>`** or just press **`<Return>`** to default the field to a value of **`0.00`**.

- With the cursor positioned at the **`Tax:`** prompt, enter the tax dollar amount and press **`<Return>`** or just press **`<Return>`** to default the field to a value of **`0.00`**.

- With the cursor positioned at the **`Total:`** prompt, enter the total dollar amount and press **`<Return>`** or just press **`<Return>`** to default the field to a value of **`0.00`**.

- With the cursor positioned at the **`Customer Number:`** prompt, enter the customer number and press **`<Return>`**.

- With the cursor positioned at the **`Amt Paid:`** prompt, enter the amount paid dollar amount and press **`<Return>`** or just press **`<Return>`** to default the field to a value of **`0.00`**.

- With the cursor positioned at the **`Pmt Date:`** prompt, enter the payment date (MM/DD/YY) and press **`<Return>`**.

- With the cursor positioned at the **`Category:`** prompt, enter a numeric category number between 1 and 999 and press **`<Return>`**.

☞ **Note: If a category number that does not currently exist is entered, the field will be cleared and the cursor will again be positioned at the `Category:` prompt.**

- With the cursor positioned at the **`Amount:`** prompt, enter the dollar amount to be tracked against the entered category and press **`<Return>`**.

- With the cursor positioned at the **`Qty:`** prompt, enter the quantity to be tracked against the entered category and press **`<Return>`**.

- With the cursor positioned at the **`Core Amount:`** prompt, enter the core dollar amount to be tracked against the entered category and press **`<Return>`** or just press **`<Return>`** to default the field to a value of **`0.00`**.

- Press the **`<F10>`** (*Save*) key to save the entered commissioned sale invoice-category maintenance information.