

Salesperson Virtual Class Outline

- 1) Navigate the Salesperson screens
 - a) Identify Master, Price Check, Remote Order Addl./WinOrder Screen
 - b) Identify Previous, Next, Find, Create a new, Save Changes, Delete, Print, View Allowable Functions, Contact Maintenance and Help buttons
- 2) Explain the numbering structure of order-writer and salesperson ID's
 - a) Order-writer number must be 101 or greater and up to four digits
 - b) Salespersons can have two, three, or four-digit numbers
 - c) Numbers ending in 00 are reserved for in-house sales accounts
 - d) Recommend using location as the first digits and last two digits for Retail (01-50) or Commercial (51-99) for the Sales Analysis Recap Report and Items Sold Restock Report (to differentiate Retail and Commercial)
- 3) Explain setup and configuration of individual salesperson and order-writer records
 - a) SalesPerson# is the key field of the SalesPerson files
 - b) Identify fields in Salesperson Master: Name, Address, City, St, Zip, District, Phone, Password, Group, Restrict O/E inquiry
 - i) District is a one character user-defined field for sorting and limiting reports
 - ii) Group is a four character user-defined field for sorting and limiting reports
 - iii) Restrict O/E inquiry applies to the Furniture application to restrict furniture order retrievals to the salespersons orders only
 - c) Identify History fields: Monthly, Yearly, and Last Year Sales, Cost, Margin, Gross
 - i) Cost displayed in the History fields is determined by the Salespersons Parameters (LHY)
 - ii) Displaying Cost, margin or gross profit may be turned off in the salesperson parameters screen
 - iii) Monthly updated when an invoice or credit memo is final verified and is cleared at month-end
 - iv) Yearly Updated when an invoice or credit memo is final verified. Figures are moved to Last Year during Year-end procedures
 - v) Last Year updated during Year-end procedures
 - d) Identify and explain the following Text Base Usage Options: Use Text Base O/E, P/O, A/R and A/P
 - e) Identify and explain Disallowed Pay Codes
 - f) Identify and explain the Price Check fields
 - i) Ignore Order Entry Mast Cost Parameter overrides the Mast Cost Parameter in the Order Entry Pricing Parameters screen
 - ii) Show Cost and Show GP % determines whether the salesperson will be able to view cost and/or GP% in order-entry. Select Average, Mfg, Whl, Purchasing or Pricing
 - iii) Set and explain allowable functions according to preference for the following: Multi Vendor Display, Changing Pricing Cost, Changing Pricing GP%

Changing List Price, Changing Sell Price, changing Cust Params, Online Vendor Checks

- iv) Mask Multi-Vendor cost determines whether to display multiple vendor cost information when accessing the Multiple Vendor screen through EL.
- v) Ignore Price Change Password will override the specifications of the O/E Price Cost Change and O/E Price Only Changes passwords in the Additional Order Entry Parameters (LG5)
- 4) Identify Allowable Functions screen and explain basic security procedures, more information may be found in documentation and help
- 5) Create a house account record with 00 as the last two digits to accumulate a history of sales for customers not assigned to a specific salesperson
- 6) Identify Remote Order fields for those using Remote Order Entry
 - a) Remote ID restricts a remote customer to the Order Entry application
 - i) Explain the Remote ID box in the Customer Order Entry tab
 - ii) Code must be numeric if remote terminal is attached to a slave printer
 - b) Time Out for Logoff is the number of seconds to wait before the modem disconnects the customer
 - c) In Shipped Qty specifies the information appearing in the Ship box in remote order entry
 - i) A or blank shows actual on-hand
 - ii) S shows only shipped quantities, regardless of on-hand
 - iii) N always shows quantities as backordered
 - d) Set the following to show in the Remote Order Entry screen according to preference (see documentation or Help for more information on the fields): Display Only the Sell Price, Vendor Fields, Packaging Fields, List Field, Other Fields, Display On Hand/Vendor Line, Display List/Quantity Breaks Line, List Field, Contract Field, Discount Type and Percent Field, Sell Price Field, Effective Discount Percent, Minimum Discount
 - e) Additional Remote Order parameters found in the Addl./WinOrder screen, see documentation for more information
 - i) Display Customer Alias instead of Real Item Number
 - ii) Auto Item Query
 - iii) Exempt from Minimum Order Charge
 - iv) Authorization Password to 'END' Order
 - f) WinOrder Fields used by WinOrder customers. See WinOrder setup instructions for more information
- 7) Maintain salesperson records using change and delete
- 8) Create and maintain salesperson indexes for record inquiries using the eNsite Pro Utilities
- 9) Run basic salesperson reports
 - a) Customer Salesperson Address Listing report prints general information for each salesperson, sorted in salesperson number order
 - b) Salesperson History Analysis Report shows the sales history for each salesperson sorted in salesperson number order