



Adds a number of sales management tools to UA: expense reporting, enhanced commissions, charting

Add Expense Vouchers
Empid: JACK SU Reason: Period: 3/31/2003 11:19:42 AM
Type: Freight Reason: @fgdgdfstgretrestredtrtsre
Jobid: best
ECN: 154

Category	Amount	Receipt
Freight Out Variance	\$15.00	<input checked="" type="checkbox"/>
Freight Out		

Edit Open Expense Vouchers
Empid: 110 Reason: Period: 10/31/2000 11:13:34 AM
Type: Sales
Jobid: 1
ECN:

Category	Amount	Receipt
Travel	\$1,944.48	<input type="checkbox"/>
Benefits	\$152.56	<input type="checkbox"/>
Gas, Oil, Wash etc.		<input type="checkbox"/>
Entertainment		<input type="checkbox"/>
Lodging		<input type="checkbox"/>
Car Payment, Rentals		<input type="checkbox"/>
Car Insurance		<input type="checkbox"/>

Expense Type
Sales
Training
Business Development
HRS

Close Open Expense Vouchers
Closing the expense reporting period will mark all open expense vouchers up to and including the date specified as closed. This will prevent any further edits to these records.
Latest Date:
Close Selected Records Cancel

Expense Categories
Category: Benefits
GLID: 71600
Record: 1 of 13

- Tracks employee sales commissions and expense vouchers by period
- Enables easy filtering of Employee, Type, and Job ID code
- Edits open expense vouchers
- Include notes of explanation for expenses
- Check box indicates the presence of receipt
- Administrative features enable definition and correlation to specific accounting codes to classify expenditures
- Categorizes expenses by type
- Assigns expense type to General Ledger Account Number
- Automatically updates General Ledger Accounts
- Closing the expense reporting period marks all open expense vouchers closed and updates General Ledger Accounts

- Supports Hierarchical Sales Territory, Zones and Regions
- Assigns Manager to zones and levels
- Supports split commissions
- User defined Commission Plans
- Set commission Step Levels
- Assigns employee to Commission Level, Rates and Commission Plans

Commission Rates

step	max	rate	Commission Plan
1	1000	10.00%	Level 1
2	5000	20.00%	Level 1
3	10000	30.00%	Level 1

Sales Commission Plan Assignment

Employee #	Commission Plan
104	Barbara Jones Level 1
114	Don Roberts Level 1
109	Linda Trask Level 1
116	Marcus Turner Level 2
110	Watts Wilson Level 2
120	Donna Terris

LtdEmployee
EmployeeID: 48
FirstName: TOM
LastName: MATTHEWS
Address1: 4325 Main
Address2: PO Box 345
City: Somewhere
State: NC
ZipCode: 55555
Active:
SalesMan:
Is Tech:
Is Sales Admin:

Sales Assignments
Employee #:
Last Name: barbara Jones Participant
commission level: Salesman Other Comm Rate: 0
Select Level 2 Manager: Don Roberts
Select Level 3 Manager: Don Roberts

Sales Commission Setup
Define Commission Plans
Set Commission Step Levels
Assign Commission Plan to Participants
To add or remove participants, check (or uncheck) the salesman box on the PR employee maintenance form

Commission Plans
Plan Name
Level 1
Level 2
Level 3

Invoice Report by SalesPerson
Report: Open Invoices Closed Invoices
Start Date:
End Date: 11/12/2002
Salesperson: Barbara
Show All Salespeople:
Exit

- Filter the AR Invoice Report to display the sales made by each salesperson made within a given date range
- Check box causes the report to display all sales by all sales personnel
- Uncheck to select a specific sales person's records to display
- Select whether to view open invoices or closed invoices

- A variety of Commission Reports available
- Commission Reports filtered by date
- Select Open Accounts, Closed Accounts, or All

Commissions Due Report Selector

Commissions are calculated based on the payment received date, the prorated share of profits net of sales expenses (based on the sales amount, less a prorated share of any taxes in the invoice, and average cost of each material) calculated for each invoice.

Sale Person:

Commissions

Report Filter: Open Closed All

Start Date: End Date:

Salesperson: Start Date: End Date:

Select Commission Type: Primary Split Invoiced Split Paid Tech

Summary only

Print Preview

Commissions Report

Emp	Inv#	Cust	InvAmt	DatePaid	AmtPaid	SaleAmt	Cost	AvgCost	Profit
Barbara Jones									
13/29/2000	1343	MARCO C	\$7,500.00	3/7/2001	\$7,500.00	\$7,500.00	\$3,296.00	3891.23	\$3,604.00

Commissions Due

Start Date: 6/1/2000
End Date: 12/31/2000

EmpID	Employee#	Total Invoices	Total Costs	Gross Profits	Profits Collected
104					

Commissionable Prorates

Start Date: 6/1/2000
End Date: 12/31/2000

Employee#	Date	Invoice#	PO#	Order#	Customer	Invoiced	Cost	Profits
Date by Month								
104								

Commissions on Orders Billed (Split Invoiced -- Variance)

From: 2/26/2003 To: 3/28/2003

Order#	Qty	Cost (sa)	Cost (tot)	Inv Price (sa)	Inv Price (tot)	Customer	Gpm	Rate	Commission	Qty	Cost (sa)	Cost (tot)	Total ROC	Cost Minus Total Cost
ACCOUNT														
4000341	2295					US FOODSERVICE								
2		\$397.36	\$774.72	\$487.00	\$487.00	\$109.28				2	\$397.36	\$774.72	\$0.00	
2		\$37.79	\$75.58	\$39.00	\$78.00	\$42.42				2	\$39.79	\$79.58	\$4.00	
25		\$6.00	\$165.00	\$8.00	\$8.00	\$35.00				25	\$6.00	\$165.00	\$0.00	
4000626	2736					DEL AFFLIANCE PARTS CO, INC								
1		\$320.85	\$320.85	\$36.00	\$36.00	\$35.15 35.00%		\$12.20		1	\$320.85	\$320.85	\$0.00	
1		\$68.71	\$68.71	\$78.00	\$78.00	\$9.29 35.00%		\$3.25		1	\$68.71	\$68.71	\$0.00	
ACCOUNT:		\$1404.86		\$1726.00	\$321.14	0.90%		\$15.35				\$1,408.86	\$4.00	

Expense Voucher

Start: 12:00:00 AM
End: 12:00:00 AM

Employee	Date	Category	Amount	PAID	Auth. Rpt	Job #	Ext
110	10/31/2000	Wmts Wilkon					
		Communications Supp.	\$300.00				<input type="checkbox"/>
		Inside Support	\$1,750.00				<input type="checkbox"/>
		Car Insurance	\$120.24				<input type="checkbox"/>
		Car Payment, Rentals	\$388.16				<input type="checkbox"/>
		Lodging	\$38.23				<input checked="" type="checkbox"/>
		Entertainment	\$600.97				<input checked="" type="checkbox"/>
		Gas, Oil, Wash, etc.	\$202.35				<input checked="" type="checkbox"/>

- Select Expense Voucher Report by Category, Open Expenses, Closed Expenses, or all
- Filter Expense Voucher Report by date range
- Choose either a detailed report or summary
- Fields include: Employee ID, Date, Category of Expense, the amount, amount paid, etc.

Expense Vouchers By Category

Status: Open Closed All

Category: All

Start Date: End Date:

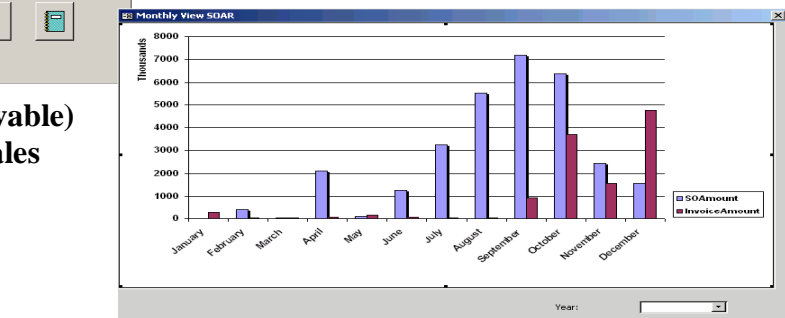
Expense Voucher Report Selector

Status: Open Closed All

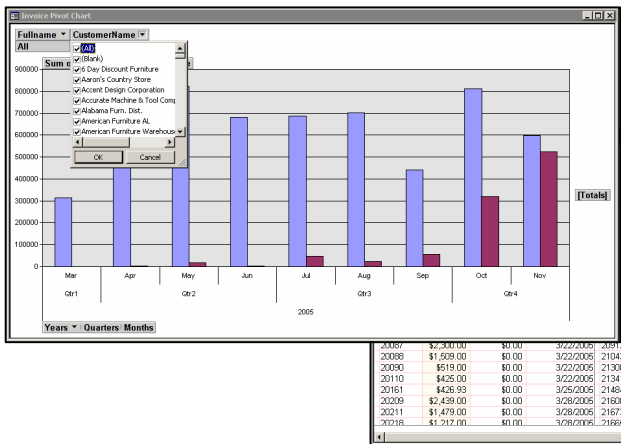
Employee: All

Start Date: End Date:

Type: Detail Summary



- SOAR (Sales Order and Accounts Receivable) produces a graphic display of monthly sales orders and invoices
- Auto updates
- Select by sales person or all



Sales Analysis by Customer, salesperson, date – pivot tables charts and data

Emp#	Amount	ARBalance	ARInvoiceDate	Invoice#	Amount
1	\$1,160.00	\$0.00	5/28/2005	22109	\$2,315
1	\$599.00	\$0.00	5/31/2005	22111	\$1,294
1	\$1,110.00	\$0.00	4/12/2005	22110	\$6,667
1	\$0.00	\$0.00	4/12/2005	22120	\$1,244
1	(\$1,149.00)	\$0.00	4/12/2005	22121	\$405
1	\$988.00	\$0.00	4/19/2005	22122	\$1,862
1	\$1,616.00	\$0.00	4/19/2005	22123	\$189
1	\$625.00	\$0.00	5/5/2005	22126	\$2,447
1	\$1,509.00	\$0.00	3/22/2005	21043	\$1,373.00
20090	\$619.00	\$0.00	3/22/2005	21308	\$1,208.00
20110	\$425.00	\$0.00	3/22/2005	21341	\$1,049.00
20161	\$426.93	\$0.00	3/25/2005	21484	\$1,548.00
20209	\$2,439.00	\$0.00	3/28/2005	21608	\$1,208.00
20211	\$1,479.00	\$0.00	3/28/2005	21673	\$1,779.00
20218	\$1,312.00	\$0.00	3/28/2005	21665	\$1,493.00
20205	\$26,000.00	\$0.00	2/22/2005	20915	\$0.00
20098	\$1,509.00	\$0.00	3/22/2005	21043	\$1,373.00
20090	\$619.00	\$0.00	3/22/2005	21308	\$1,208.00
20110	\$425.00	\$0.00	3/22/2005	21341	\$1,049.00
20161	\$426.93	\$0.00	3/25/2005	21484	\$1,548.00
20209	\$2,439.00	\$0.00	3/28/2005	21608	\$1,208.00
20211	\$1,479.00	\$0.00	3/28/2005	21673	\$1,779.00
20218	\$1,312.00	\$0.00	3/28/2005	21665	\$1,493.00