Sales Management Last Modified on 07/07/2023 9:42 am EDT

Pathway: Sales > Sales Management

The Sales Management screen consists of two sections: the upper grid and the lower grid. The upper grid provides a summary of contracts and proposals submitted by each sales representative along with the commissions they generate. By selecting a value from one of the columns in the upper grid, a breakdown will display in the lower grid specific to the sales rep.



Field Descriptions - Upper Grid

Field	Description	
Filters and Screen Buttons		
All/Division Name	Option to filter the Sales Management screen to a specific division, or group of divisions.	
Pending Approval	Option to filter the data based on the approval period. Once a selection is made, a separate drop-down box will display to the right of the "Pending Approval" drop-down field. This new drop-down will contain each month corresponding to the selected year, allowing you to further refine your filtering.	
Sales Rep Report	Option to generate an Excel report for all sales reps, or only a selected on.	
Commission Report	Option to generate and Excel report for all sales reps, or only on the selected one.	
Grid Descriptions		
Sales Rep	Displays the sales representative's name. A sales representative will only display if a proposal, order form or service contract assigned to them is pending review or approval.	
Authorization Pending	Displays the number of proposals or contracts a sales rep has waiting for pre- authorization by an authorized user. Additional setup is required to implement a pre-authorization process.	

Contract Review Pending	Displays the number of proposals or contracts a sales rep has waiting for an authorized user to review and/or approve. Once approved the customer will display in Order Processing for service setup. Additional setup is required to implement a review process.
Contract Review Complete	Indicates the contract has been reviewed as part of an internal process. Additional setup required.
Commission Review Pending	Indicates the total revenue amount commission is based from that is pending review. Example: sales revenue may be \$100/month but a sales representative may be commissioned at 300% of the first month's revenue. The value represented in the Commission Review Pending column is the revenue amount of \$100.
Excluded From Commission	Indicates the amount that is excluded from commissions for a sales representative.
Commission Revenue	The total amount of revenue the sales rep generated that is subject to commission earnings. Select the value to display a detailed break down in the lower grid.
Commission Amount	The total amount of commissions the sales representative earned calculated from the commission revenue's earnings.

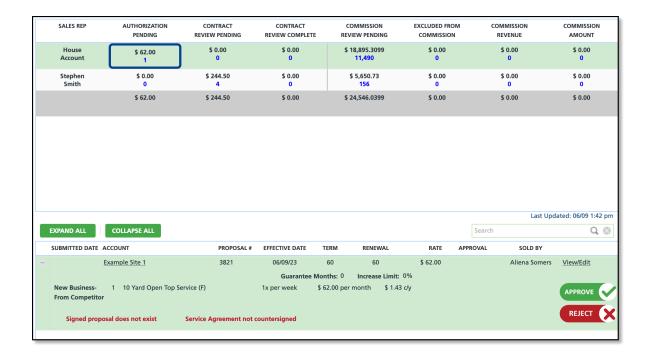
Field Descriptions - Lower Grid

Field	Description		
Buttons			
Expand All	Expands all contracts for the sales representative.		
Collapse All	Collapses all contracts for the sales representative.		
Contract Fields	Contract Fields		
Submitted Date	Displays the date the sales representative submitted the service agreement.		
Account	Displays the name of the account the service agreement is for.		
Proposal #	Displays the proposal number.		
Effective Date	The date services and billing will begin.		
Term	The initial term length of the service agreement.		
Renewal	Indicates the automatic renewal term length.		
Rate	Displays the total rate amount for the service(s) included in the service agreement.		
Approval	Displays the approved by user.		
Sold By	Identifies who made the sale. Provides flexibility if it was someone other than the sales representative.		

Edit/View	Option to open and view the contract. Users will only be able to edit contract
Luit/ view	details if the status of the service agreement is not marked 'sold'.
Commission Fields - Pendi	ng, Excluded and Revenue
Submitted Date	Displays the date the contract was submitted.
User	Displays the name of the user/sales rep who submitted the contract.
Account	Displays the account the commission is in reference to.
Proposal #	Displays the proposal/contract number the commission is in reference to.
Start Date	Displays the services start date.
Туре	References the revenue type - this only displays as recurring.
Rate Change	Indicates the revenues rate change. Black indicates a neutral or positive change. Red indicates a rate decrease or an end to the rate.
Reason	Indicates the reason for the rate change. The reason is identified when the proposal/contract is created.
Commission	
Commission Amount Field	ls
Source	Displays the source of how the contract originated. This is identified when the service contract is created.
Sales Rep	Displays the name of the sales rep assigned to the contract the commission is in reference to.
Site	Displays the site a commission is being earned from.
Proposal #	Displays the proposal or contract number the commission is in reference to.
Commission Rule	Identifies the commission rule that is used in calculating commissions earned for a sales representative. Additional setup required to establish calculation rules.
Note	Internal field for notes.
Amount Approve	The amount that was approved for the commission.

Authorization Pending

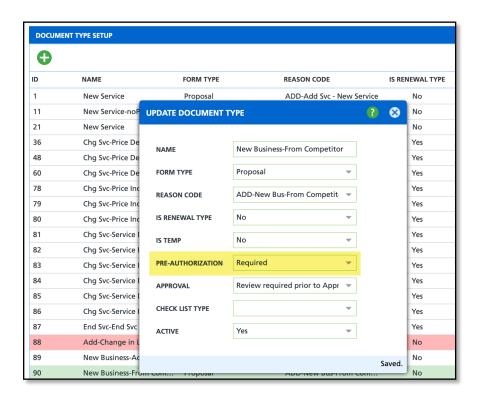
The "Authorization Pending" is an optional process that can be implemented by a sales manager. It entails the review of proposals and contracts before they can be issued to customers.



Setup

Pathway: Setup > Document Formats > Type

When the Pre-Authorization field in the Update Document Type is set to "Required," the proposal or contract must be approved before the sales representative can send it to the customer.



Use

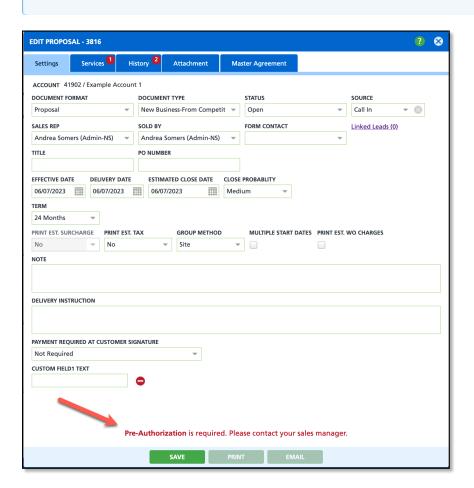
The user cannot proceed with the sales process until the proposal or contract has been approved.

Approve: Sales rep will receive a blue notification alerting them the proposal was approved.

Reject: Sales rep will receive a blue notification alerting them the proposal was rejected. In addition, the proposal screen will display the timestamp and name of the reviewer who rejected it along with the rejection note. If

necessary, the sales representative will need to create a new contract to continue a sale with the prospective customer.

Once the sales manager or another authorized user has marked the proposal or contract 'Approved', it will no longer display in the Authorization Pending column count.



Contract Review Pending

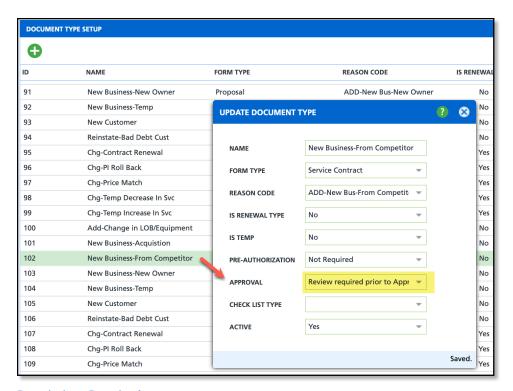
The "Contract Review Pending" status applies exclusively to contracts that have been signed by the customer and countersigned by the sales representative. If there is a preference for automatic approval of contracts, the process can be automated. However, if auto-approval is not the preferred method, please refer to the Setup section below for further instructions.



Setup

Pathway: Setup > Document Formats > Type

There are two methods to establish the approval process: the first method involves a two-step process, where the contract undergoes a review first and then receives approval. In this case, an additional "Reviewed" button will be present before the "Approve" button. The second method simplifies the process by only requiring approval without the need for a prior review.



Permissions Required

The Sales Management tool requires a user have permissions to review, approve and reject proposals and contracts.

Permission ID	Permission Name
61	Sales Management
78	Approve Orders and Contracts - users with this permission will also be able to unapprove a contract that was previously approved.
79	Reject Orders and Contracts
177	Review Orders and Contracts

Approval Option: Review Required for Approval

Requires an authorized user to review the proposal or contract and mark it 'Reviewed' before the contract can be approved.

- 1. From the Document Type Setup screen, double click on the contract you would like to enable the review requirement for.
- 2. Select 'Review Required Prior to Approval' from the Approval drop down field.
- 3. Click away to prompt the system to auto-save the change and close the Update Document Type popup window.

Approval Option: Required

Requires the proposal or contract be approved by an authorized user before the sales process can continue. When the proposal/contract has been approved the assigned sales rep will receive a blue notification.

- 1. From the Document Type Setup screen, double click on the contract you would like to enable the approval requirement for.
- 2. Select 'Required' from the Approval drop down field.
- 3. Click away to prompt the system to auto-save the change and close the Update Document Type popup window

Approval Option: Automatic

Selecting this option does not require a sales rep to wait for approval to continue with the sales process.

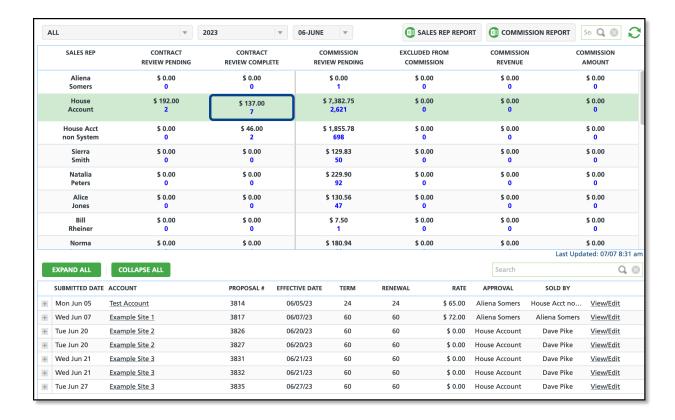
Use

The following example illustrates a setup where contract review is required for approval. After the contract has been reviewed, it will remain in a pending status until an authorized user approves it. The name of the reviewer and timestamp will display for the contract. Upon approval, the sales representative will receive a blue notification, and the contract will be updated to display the timestamp of approval.



Contract Review Complete

After a contract has been reviewed and marked 'Approved', it will display under the 'Contract Review Complete' column for the sales representative assigned to it.



Unapprove Contracts

If the internal process requires the approval of contracts before the sales rep can continue with the sale, the option also exists to unapprove a contract should the need arise. However, unapprove IS NOT available after the service has been posted.

