

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.

CORPUS		PENDING APPROVAL		SALES REP REPORT	COMMISSION REPORT	Search	
SALES REP	AUTHORIZATION PENDING	CONTRACT REVIEW PENDING	CONTRACT REVIEW COMPLETE	COMMISSION REVIEW PENDING	EXCLUDED FROM COMMISSION	COMMISSION REVENUE	COMMISSION AMOUNT
House Account	\$ 0.00 0	\$ 65.00 1	\$ 0.00 0	\$ 3,834.77 67	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
Stevan Silva	\$ 0.00 0	\$ 244.50 4	\$ 0.00 0	\$ 5,650.73 156	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
	\$ 0.00	\$ 309.50	\$ 0.00	\$ 9,485.50	\$ 0.00	\$ 0.00	\$ 0.00

Last Updated: 06/06 1:44 pm

EXPAND ALL | COLLAPSE ALL

Search

SUBMITTED DATE	ACCOUNT	PROPOSAL #	EFFECTIVE DATE	TERM	RENEWAL	RATE	APPROVAL	SOLD BY

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. <i>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.</i>
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	
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 details if the status of the service agreement is not marked 'sold'.
Commission Fields - Pending, 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.
Type	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 Fields	
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.

SALES REP	AUTHORIZATION PENDING	CONTRACT REVIEW PENDING	CONTRACT REVIEW COMPLETE	COMMISSION REVIEW PENDING	EXCLUDED FROM COMMISSION	COMMISSION REVENUE	COMMISSION AMOUNT
House Account	\$ 62.00 1	\$ 0.00 0	\$ 0.00 0	\$ 18,895.3099 11,490	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
Stephen Smith	\$ 0.00 0	\$ 244.50 4	\$ 0.00 0	\$ 5,650.73 156	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
	\$ 62.00	\$ 244.50	\$ 0.00	\$ 24,546.0399	\$ 0.00	\$ 0.00	\$ 0.00

Last Updated: 06/09 1:42 pm

EXPAND ALL COLLAPSE ALL Search

SUBMITTED DATE	ACCOUNT	PROPOSAL #	EFFECTIVE DATE	TERM	RENEWAL	RATE	APPROVAL	SOLD BY
	Example Site 1	3821	06/09/23	60	60	\$ 62.00		Aliena Somers View/Edit
		Guarantee Months: 0		Increase Limit: 0%				
New Business-From Competitor		1	10 Yard Open Top Service (F)	1x per week	\$ 62.00 per month	\$ 1.43 c/y	<input type="button" value="APPROVE"/> <input checked="" type="checkbox"/> <input type="button" value="REJECT"/> <input checked="" type="checkbox"/>	
Signed proposal does not exist		Service Agreement not countersigned						

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.

ID	NAME	FORM TYPE	REASON CODE	IS RENEWAL TYPE
1	New Service	Proposal	ADD-Add Svc - New Service	No
11	New Service-noP			No
21	New Service			No
36	Chg Svc-Price De			Yes
48	Chg Svc-Price De			Yes
60	Chg Svc-Price De			Yes
78	Chg Svc-Price Inc			Yes
79	Chg Svc-Price Inc			Yes
80	Chg Svc-Price Inc			Yes
81	Chg Svc-Service I			Yes
82	Chg Svc-Service I			Yes
83	Chg Svc-Service I			Yes
84	Chg Svc-Service I			Yes
85	Chg Svc-Service I			Yes
86	Chg Svc-Service I			Yes
87	End Svc-End Svc			Yes
88	Add-Change in L			No
89	New Business-Ac			No
90	New Business-Fro			No

UPDATE DOCUMENT TYPE

NAME:

FORM TYPE:

REASON CODE:

IS RENEWAL TYPE:

IS TEMP:

PRE-AUTHORIZATION:

APPROVAL:

CHECK LIST TYPE:

ACTIVE:

Saved.

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.

EDIT PROPOSAL - 3816

Settings Services ¹ History ² Attachment Master Agreement

ACCOUNT 41902 / Example Account 1

DOCUMENT FORMAT: Proposal | DOCUMENT TYPE: New Business-From Competit | STATUS: Open | SOURCE: Call In

SALES REP: Andrea Somers (Admin-NS) | SOLD BY: Andrea Somers (Admin-NS) | FORM CONTACT: [Empty] | [Linked Leads \(0\)](#)

TITLE: [Empty] | PO NUMBER: [Empty]

EFFECTIVE DATE: 06/07/2023 | DELIVERY DATE: 06/07/2023 | ESTIMATED CLOSE DATE: 06/07/2023 | CLOSE PROBABILITY: Medium

TERM: 24 Months

PRINT EST. SURCHARGE: No | PRINT EST. TAX: No | GROUP METHOD: Site | MULTIPLE START DATES: [] | PRINT EST. WO CHARGES: []

NOTE: [Empty Text Area]

DELIVERY INSTRUCTION: [Empty Text Area]

PAYMENT REQUIRED AT CUSTOMER SIGNATURE: Not Required

CUSTOM FIELD1 TEXT: [Empty] -

Pre-authorization is required. Please contact your sales manager.

SAVE PRINT EMAIL

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.

ALL		PENDING APPROVAL		SALES REP REPORT	COMMISSION REPORT	Search	
SALES REP	AUTHORIZATION PENDING	CONTRACT REVIEW PENDING	CONTRACT REVIEW COMPLETE	COMMISSION REVIEW PENDING	EXCLUDED FROM COMMISSION	COMMISSION REVENUE	COMMISSION AMOUNT
Andrea Hunt	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
House Account	\$ 0.00 0	\$ 65.00 1	\$ 0.00 0	\$ 17,711.3099 11,338	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
Stephen Smith	\$ 0.00 0	\$ 244.50 4	\$ 0.00 0	\$ 5,650.73 156	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0
	\$ 0.00	\$ 309.50	\$ 0.00	\$ 23,362.0399	\$ 0.00	\$ 0.00	\$ 0.00

EXPAND ALL | COLLAPSE ALL | Search | Last Updated: 06/07 1:37 pm

SUBMITTED DATE	ACCOUNT	PROPOSAL #	EFFECTIVE DATE	TERM	RENEWAL	RATE	APPROVAL	SOLD BY
Wed Jun 07	Example Site 1	3817	06/07/23	60	60	\$ 72.00		Andrea Hunt

New Business-From Competitor | 1 | 10 Yard Open Top Service | Guarantee Months: 0 | On Call | Increase Limit: 0% | \$ 72.00 per month | \$ 0.00 cty

APPROVE ✓ | REJECT ✗

View Signed Agreement

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.

DOCUMENT TYPE SETUP				
ID	NAME	FORM TYPE	REASON CODE	IS RENEWAL
91	New Business-New Owner	Proposal	ADD-New Bus-New Owner	No
92	New Business-Temp			No
93	New Customer			No
94	Reinstate-Bad Debt Cust			No
95	Chg-Contract Renewal			Yes
96	Chg-PI Roll Back			Yes
97	Chg-Price Match			Yes
98	Chg-Temp Decrease In Svc			Yes
99	Chg-Temp Increase In Svc			Yes
100	Add-Change in LOB/Equipment			No
101	New Business-Acquisition			No
102	New Business-From Competitor			No
103	New Business-New Owner			No
104	New Business-Temp			No
105	New Customer			No
106	Reinstate-Bad Debt Cust			No
107	Chg-Contract Renewal			Yes
108	Chg-PI Roll Back			Yes
109	Chg-Price Match			Yes

UPDATE DOCUMENT TYPE

NAME: New Business-From Competitor

FORM TYPE: Service Contract

REASON CODE: ADD-New Bus-From Competit

IS RENEWAL TYPE: No

IS TEMP: No

PRE-AUTHORIZATION: Not Required

APPROVAL: Review required prior to Appr

CHECK LIST TYPE:

ACTIVE: Yes

Saved.

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.

The screenshot shows a table of contracts with columns: SUBMITTED DATE, ACCOUNT, PROPOSAL #, EFFECTIVE DATE, TERM, RENEWAL, RATE, APPROVAL, and SOLD BY. The contract details for 'Example Site 1' (Proposal # 3820) are shown below the table. The contract is in a pending status, and the 'APPROVE' button is highlighted with a red arrow. The 'REVIEWED BY' field shows 'Aliena Somers' and the timestamp '06/08/2023 7:50 pm'. There are also 'REJECT' and 'View/Edit' buttons. A red arrow points from the 'APPROVE' button to the 'REVIEWED BY' field. Below the contract details, there are two red error messages: 'Signed proposal does not exist' and 'Service Agreement not countersigned'.

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.

ALL		2023	06-JUNE	SALES REP REPORT	COMMISSION REPORT	Search	
SALES REP	CONTRACT REVIEW PENDING	CONTRACT REVIEW COMPLETE	COMMISSION REVIEW PENDING	EXCLUDED FROM COMMISSION	COMMISSION REVENUE	COMMISSION AMOUNT	
Aliena Somers	\$ 0.00 0	\$ 0.00 0	\$ 0.00 1	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	
House Account	\$ 192.00 2	\$ 137.00 7	\$ 7,382.75 2,621	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	
House Acct non System	\$ 0.00 0	\$ 46.00 2	\$ 1,855.78 698	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	
Sierra Smith	\$ 0.00 0	\$ 0.00 0	\$ 129.83 50	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	
Natalia Peters	\$ 0.00 0	\$ 0.00 0	\$ 229.90 92	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	
Alice Jones	\$ 0.00 0	\$ 0.00 0	\$ 130.56 47	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	
Bill Rheiner	\$ 0.00 0	\$ 0.00 0	\$ 7.50 1	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	
Norma	\$ 0.00	\$ 0.00	\$ 180.94	\$ 0.00	\$ 0.00	\$ 0.00	

Last Updated: 07/07 8:31 am

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Search

SUBMITTED DATE	ACCOUNT	PROPOSAL #	EFFECTIVE DATE	TERM	RENEWAL	RATE	APPROVAL	SOLD BY	
Mon Jun 05	Test Account	3814	06/05/23	24	24	\$ 65.00	Aliena Somers	House Acct no...	View/Edit
Wed Jun 07	Example Site 1	3817	06/07/23	60	60	\$ 72.00	Aliena Somers	Aliena Somers	View/Edit
Tue Jun 20	Example Site 2	3826	06/20/23	60	60	\$ 0.00	House Account	Dave Pike	View/Edit
Tue Jun 20	Example Site 2	3827	06/20/23	60	60	\$ 0.00	House Account	Dave Pike	View/Edit
Wed Jun 21	Example Site 3	3831	06/21/23	60	60	\$ 0.00	House Account	Dave Pike	View/Edit
Wed Jun 21	Example Site 3	3832	06/21/23	60	60	\$ 0.00	House Account	Dave Pike	View/Edit
Tue Jun 27	Example Site 3	3835	06/27/23	60	60	\$ 0.00	House Account	Dave Pike	View/Edit


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.

Last Updated: 06/29 3:02 pm

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Search

SUBMITTED DATE	ACCOUNT	PROPOSAL #	EFFECTIVE DATE	TERM	RENEWAL	RATE	APPROVAL	SOLD BY	
Thu May 11	Larry Jones	3802	05/11/23	60	60	\$ 21.00	House Account	Lori Sheldt	View/Edit
Guarantee Months: 0 Increase Limit: 0%									
New Service- noPreAuth/Auto approve									
1 Monthly Trash Svc - 96 Gallon Cart (F) 1x per week \$ 21.00 per month \$ 9.70 c/y									
									
View Signed Agreement									