DSM120 Sales Representative Maintenance

Overview   Sales representatives (Reps) can be made responsible for the sale of specific titles to selected customers or Reps can be assigned to customers only, with no link to titles at all. Sales can be recorded by Sales Rep, and by assigning a Sales Rep code to a particular title or group of titles, management is able to closely monitor representatives' performances by title. Each customer can have multiple Sales Reps by Title hierarchy.

Examples

This section illustrates examples concerning:

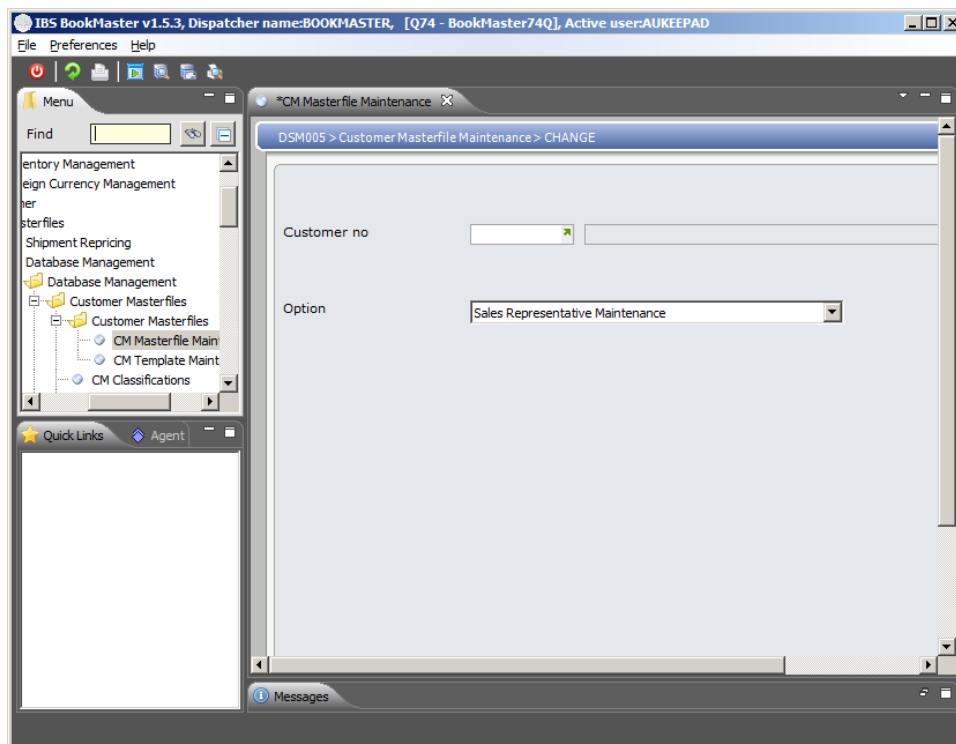## Example 1: Add sales representative to customer

This example describes how to add sales representative to customer.

1. Select option **CM Masterfile Maintenance** from Base Modules>Distribution>Masterfiles>Database Management>Customer Masterfiles>Customer Masterfiles menu.

DSM005 Customer Masterfile Maintenance main panel is displayed.

2. Select option **Sales Representative Maintenance** for the selected customer no. Click **OK** to confirm.

DSM120 Sales Representative Maintenance Change main panel is displayed.

Relevant fields

Customer key level
Customer key levels are predefined system codes, summarizing customer data into different levels, that is, the codes can refer to customers only, groups of companies the customers belong to, or to sales representatives dealing with certain customers

Customer class type
This is a code used to categories customers into customer classification types. A group of stores may be classified as a Buying Group for example, and this group of stores uses their own reference for an ISBN when placing orders. Each customer can have multiple codes with effective dates.

Customer key
Each customer is assigned an alphanumeric code. This is the code by which the customer is always referred to and how access is gained to the customer's records.

This number is system generated by setting the flag on **TMSDS/CM-GEN** to **Y**. The number allocates at the end of the account creation and is based on the last number used with the same prefix, plus one. Account numbers can be generated per company per branch with a one character prefix and this is established on **TMSDS/CM-CN**.

Functions

Add
Access Sales Representative Maintenance in add mode to add sales representative to customer.

More details
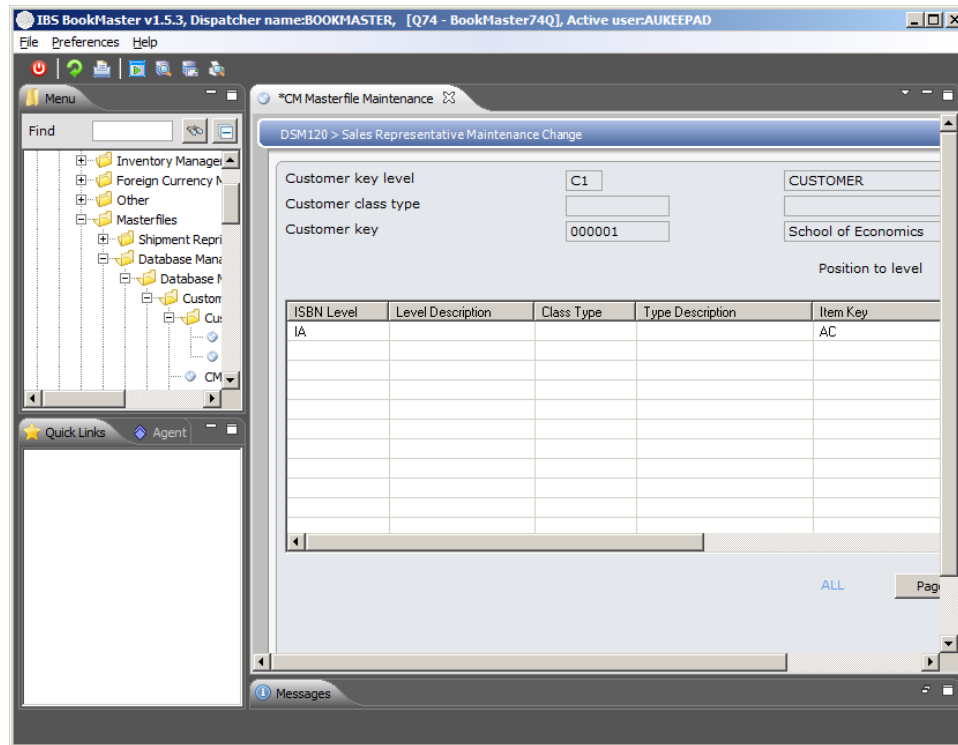Access Sales Representative Maintenance Change to display the code descriptions

Options

Delete
Access Sales Representative Maintenance in delete mode to

delete a Title and Sales Rep combination.

3. Click **Add** to add sales representative to the selected customer.

DSM120 Sales Representative Maintenance Add panel is displayed.

Relevant fields

Customer key level	Customer key levels are predefined system codes, summarizing customer data into different levels, that is, the codes can refer to customers only, groups of companies the customers belong to, or to sales representatives dealing with certain customers
Customer class type	This is a code used to categories customers into customer classification types. A group of stores may be classified as a Buying Group for example, and this group of stores uses their own reference for an ISBN when placing orders. Each customer can have multiple codes with effective dates.
Customer key	Each customer is assigned an alphanumeric code. This is the code by which the customer is always referred to and how access is gained to the customer's records.
	This number is system generated by setting the flag on **TMSDS/CM-GEN** to Y. The number allocates at the end of the account creation and is based on the last number used with the same prefix, plus one. Account numbers can be generated per company per branch with a one character prefix and this is established on **TMSDS/CM-CN**.
Key level	Levels group product details into different levels for analysis purposes. It is a hierarchical structure.

The Levels are system defined, however, each level can hold an unlimited number of user defined codes to identify the various groupings within the level. You are therefore able to analyze information or define incentive applicability by, for instance:

-Individual title

-Classification Information, relating to all titles that carry a specific classification type, is grouped and presented, such as a Markup Class/Sales and Forecast Group

-Total Information, relating to all titles, is grouped and presented.

Select a valid Key Level code for the Title Hierarchy for a Sales Rep being added to a Customer Account.

Class type

In Sales Representative Maintenance this determines the class type or the range of class types to be included in the restriction definition.

In Pending Department Definition Maintenance the department can be authorized to review pending transactions that belong to a specified Classification Type. Once the Classification Type has been selected a range of codes within that type can be nominated as applicable to the authorization requirements.

To the pending department add a user defined reason code to be used by the Classification Type pending definition. In **TMSDS/PEND-DSC** add this user defined reason code. In **TMSDS/PEND-DOC** add the document type that the pending system must recognize as part of this pending check. **TMSDS/SEQ-PDOC** must also be set up indicating the search sequence is by document type.

Actual key

Levels group product details into different levels:

-For analysis purposes

-To create definitions that relate to various groups of titles

It is a hierarchical structure which groups titles by:

-Type of Sale

-Discount Class

-Price Code

-Individual Titles: Information, relating to all titles that carry a Classification specific classification type, is grouped and presented, such as a Markup Class/Sales Forecast Group

-Level 4

-Level 3

-Level 2

-Level 1

-Title Classification

-Total: Information, relating to all titles, is grouped and presented.

-Publisher: Information, relating to all titles that are part of a specific publisher, is grouped and presented

The levels are system defined however each level can hold an unlimited number of user-defined codes to identify the various groupings within the level. You are therefore able to analyze information or define an incentive applicability by, for instance:

The entry depends on the previous selections in the Key Level and/or Class Type. If for example the entry in the Class Type was **IC-CG** Inventory Category, when prompting for a list of valid codes, details of **TMSDS/IC-CG** display.

<div style="margin-left:2em">

Sales representative

This code uniquely identifies the sales representative (rep) servicing a particular customer or site. A record of sales per rep is kept by the system for reporting.

Reps can also be classified by Product Type rather than by specific customer. If this is the case enter a default rep in this field as a catch all and the rep figures come from a combination of customer and product sales analysis.

If Reps receive commission on sales the Agent Code may be a more suitable option for monitoring rep sales. Refer to the Documentation on Agents.

TMSSA/SLRP determines which Rep to use when updating Sales History.

In Sales Order Entry there is a facility to override default reps.

Call frequency

A Call Frequency is used to determine how often a Rep should visit a Customer. This is useful for Returns Authorization where a customer can be advised when a rep will be in their area to discuss authorizing a Return. It is an information only field and is an optional entry.

This facility can be incorporated into the Returns policy. If a customer wishes to discuss returning stock, they can wait for the Rep to call on them and give a Returns Authority.

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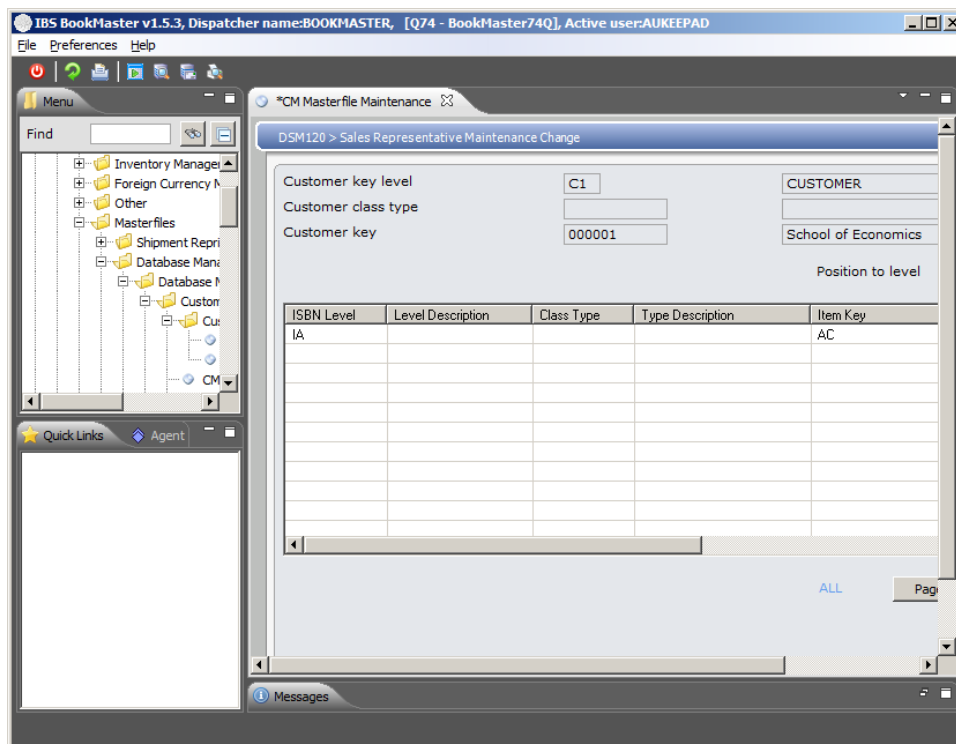4.   Key the required fields and click **OK** to confirm.

A new sales representative is added to the customer.

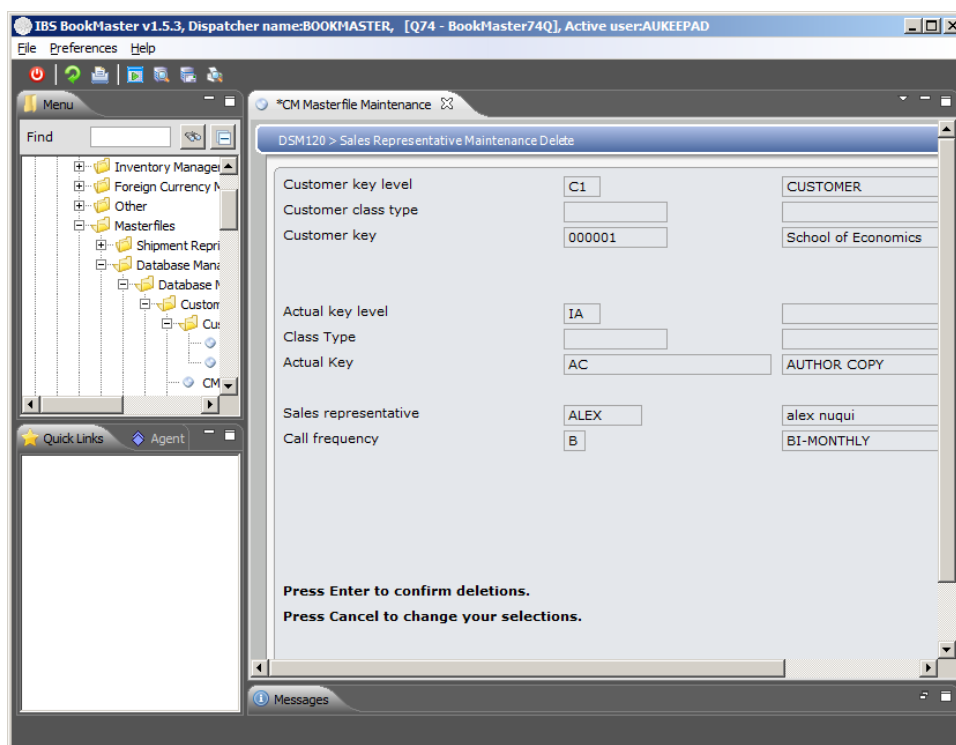## Example 2: Delete Title and Sales representative combination

1.   Repeat steps **1**, **2**, **3** of <u>Example 1: Add sales representative to customer</u>

DSM120 Sales Representative Maintenance Change main panel is displayed.

2. Select the Sales representative and click **Delete.**

DSM120 Sales Representative Maintenance Delete panel is displayed.

3. Click **OK** to confirm deletion.

The selected Sales representative is deleted.

Cross References

- DSM005A - Customer Masterfile Maintenance