
DSW320 Work with Representative Territory

Overview

An outside or external representative can be assigned to an account by zip code or postcode range and state.

A date-effective combination of state and zip codes is used. The representative for each order will be determined at order time based on a date-effective table and the agent field on the transaction will be populated with the external representative code.

Explanation

An Agent Territory file (DSAGD00P) defines a geographic region where an agent is responsible.

Order entry programs, including EDI, Batch order entry, eCommerce (Order Manager), default an agent code, which is retrieved with a given address, customer and required date. The default can be overridden is allowed.

The country is defined in address line 6 and the state is derived from the last characters of address line 4. Zip code or postcode is the address line 5.

Setup Requirements

- **TMSDS/AG-TER** contains the search levels used in the Agent territory areas with the Descriptions (these can be changed) the Type being Country, address line 4 5 and 6.
- **TMSDS/SEQ-SLRP** determines the sales representative/Agent definition to be used.
- **TMSDS/CM-SLRP** contains the valid Sales Representative or/and Agents used in the Customer Masterfile etc.

Process Flow

1. Add each Agent to the Agent Commission file.
2. Add the each Sales Representative Allocation Definition if required.
3. Assign the Agent by area code using the state, zip (post code) Country.
4. Order entry programs EDI, Batch order entry, eCommerce (Order Manager) default the agent code from the above routine and override may still be allowed.
5. Month End processing Generate Interface Accrual Records.

6. Print the Accounts Payable Transactions Report.
7. Create the Accounts Payable Transaction.
8. Purge the Accrual records.

Examples

This section illustrates examples concerning:

[Example 1: Add an Agent Territory](#)

[Example 2: Change Agent Territory Details](#)

[Example 3: Delete an Agent Territory](#)

[Example 4: Display Agent Territory Details](#)

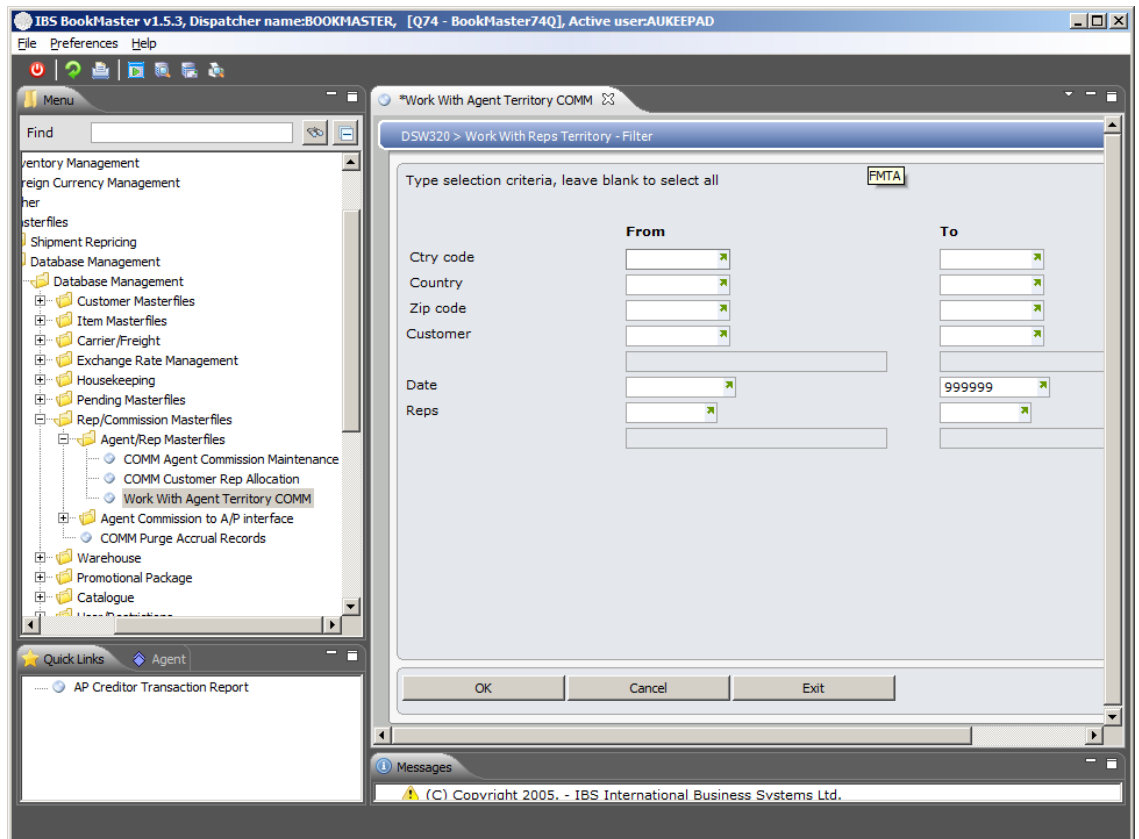
[Example 5: Copy Agent Territory Details](#)

Example 1: Add an Agent Territory

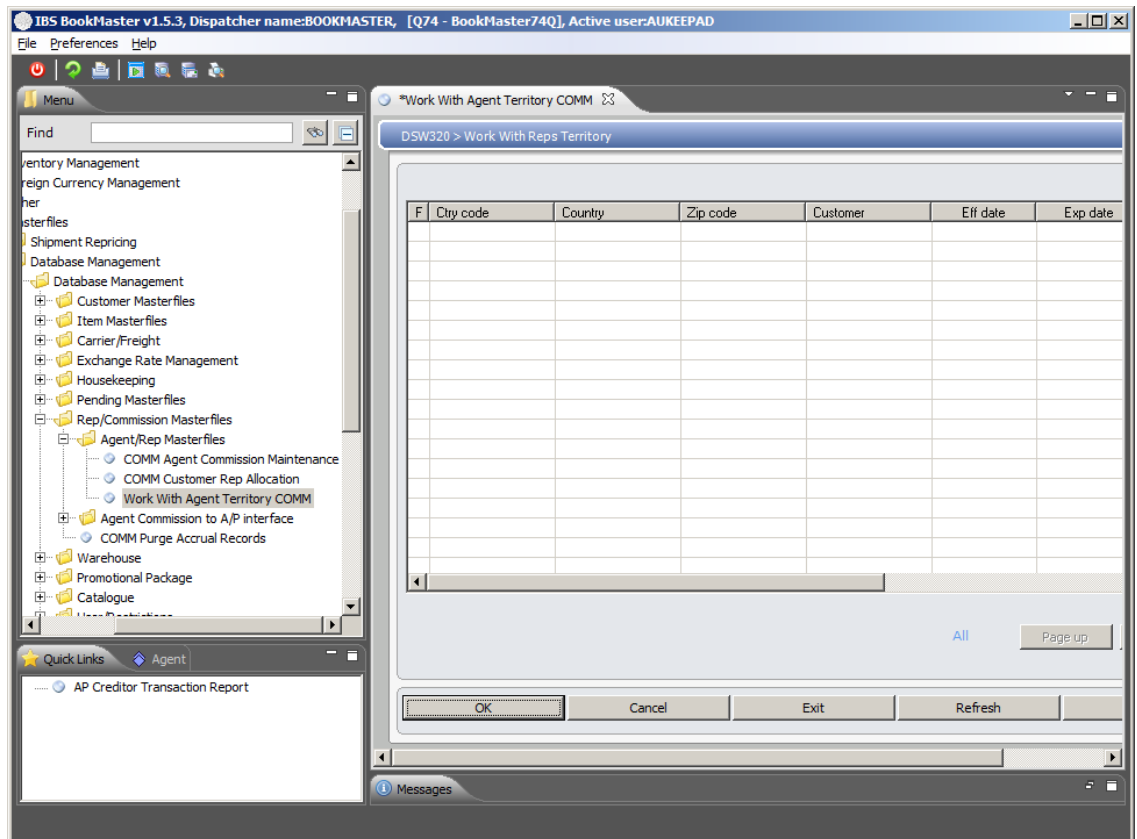
This example describes how to add an agent territory.

1. Select option **Work with Agent Territory COMM** from Base Modules>Distribution>Masterfiles>Database Management>Database Management>Rep/Commission Masterfiles>Agent/Rep Masterfiles menu.

DSW320 Work with Representative Territory - Filter panel is displayed.



2. Key in required fields or leave blank to select all and click **OK**.
DSW320 Work with Representative Territory main panel is displayed.



Options

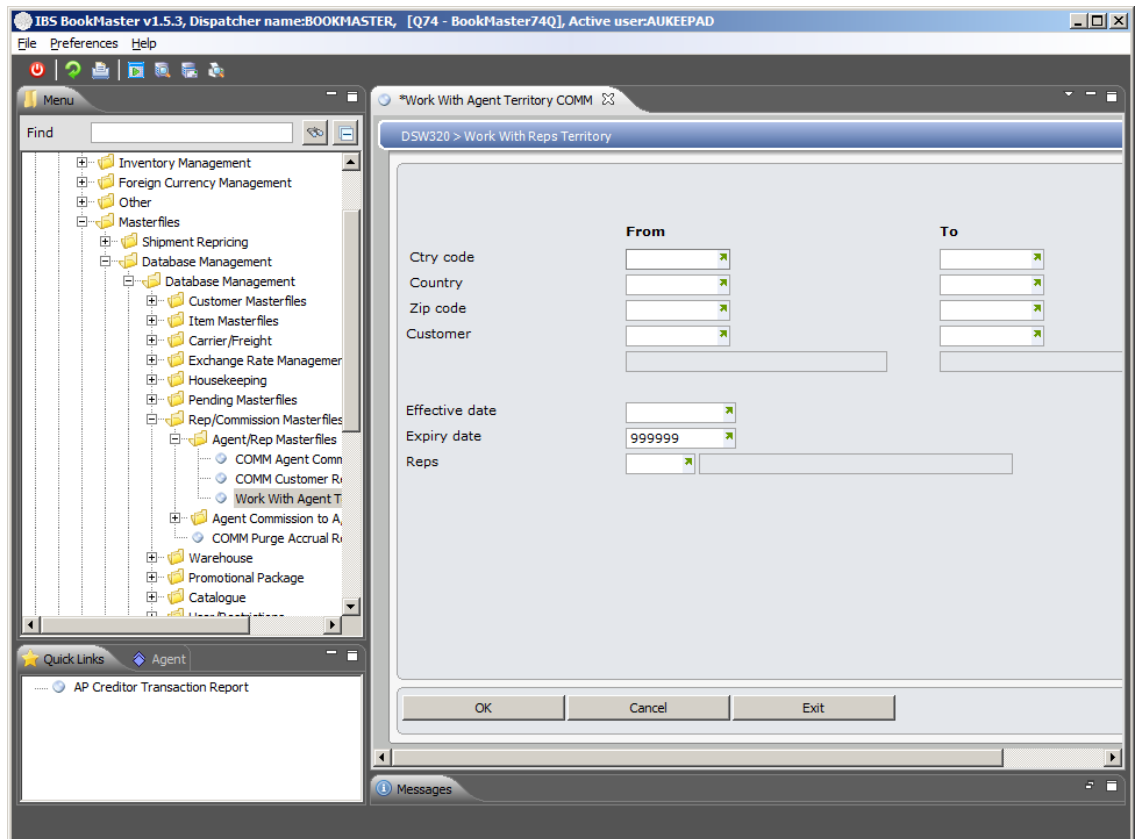
- Copy** Access DSW320 Work with Representative Territory to copy agent territory details to another.
- Detail** Access DSW320 Work with Representative Territory to change agent territory details.
- Delete** Access DSW320 Work with Representative Territory in delete mode to delete selected agent territory.
- Display** Access DSW320 Work with Representative Territory in inquiry mode to display agent territory details.

Functions

- Add** Access DSW320 Work with Representative Territory in add mode to add a new agent territory.

3. Click **Add**.

DSW320 Work with Representative Territory panel is displayed in add mode.



Relevant Fields

Country code

In work with Agent Territory enter the range of Country codes or leave blank to ignore the selection.

State

Enter the range of State codes applicable to the Rep/Agent or leave blank to ignore selection.

Zip code

A range of Postcodes or Zip codes can be entered or leave blank to ignore this selection.

Customer

Creditor

In Accounts Payable Transaction Report the Creditor number uniquely identifies the creditor. The system can automatically generate account numbers for new creditors using the format of Creditor Type plus 4 characters. The starting number defaults from the last number on file and automatically increases by 1 when a new record is filed. In TMSAP/CN Creditor number creation formula, the user indicates whether numbers are to be automatically generated or allocated manually. In change mode, search for a list of valid Creditor codes on the Masterfile.

Customer

In Work with Agent Territory the account number for the customer looked after by the Rep/Agent is mandatory.

Effective date

This is the date the Agent/Customer takes effect. This allows multiple Agents to be entered in advance but only take effect when the due date is reached.

Expiry date

In Restriction Rule Maintenance an expiry date can be entered.

In Work with Agent Territory maintenance, this date is part of the Customer Agent definition and indicates to the system when a particular Agent/Customer expires.

Agent

In Agent Commission Maintenance this code identifies a sales agent. If interfacing to Accounts Payable, an Agent could be linked to a Creditor Number.

Agent Codes are not defaulted in Sales Order Entry so if an Agent Code is applicable for an order, the code must be entered.

In Work with Agent Territory Maintenance, this code identifies a Sales agent.

4. Key in required fields and click **OK**.

The message Record addition - successfully completed displays.

Example 2: Change Agent Territory Details

This example describes how to change Agent Territory details.

1. Refer step 1 and 2 as in [Example 1: Add an Agent Territory](#)
2. Select an agent territory and click **Change**.

DSW320 Work with Representative Territory panel is displayed in change mode.

3. Make required changes and click **OK**.

Example 3: Delete an Agent Territory

This example describes how to delete an Agent Territory.

1. Refer step 1 and 2 as in [Example 1: Add an Agent Territory](#)
2. Select an agent territory and click **Delete**.

DSW320 Work with Representative Territory panel is displayed in delete mode.

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

Example 4: Display Agent Territory Details

This example describes how to display Agent Territory details.

1. Refer step 1 and 2 as in [Example 1: Add an Agent Territory](#)
2. Select an agent territory and click **Display**.

DSW320 Work with Representative Territory panel is displayed in inquiry mode.

Example 5: Copy Agent Territory Details

This example describes how to copy Agent Territory to another.

1. Refer step **1** and **2** as in [Example 1: Add an Agent Territory](#)
2. Select an agent territory and click **Copy**.

DSW320 Work with Representative Territory panel is displayed in copy mode.

3. Key in required fields and click **OK**.