

Salesperson Processing

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Overview

The purpose of this feature is to explain the use of Salespersons in Palladium from both a Setup as well as a document Processing Point of view. This feature facilitates the ability to have multiple salespersons within a single sales document and also caters for a 3-tier salesperson hierarchy from Account Manager, Regional Manager down to the salesperson on the document. We can also report on the actual user who entered the transaction should this also be required.



System Setup

There are 3 system settings relating to salespersons as displayed below:

Settings 1 Setti	ings 2					
Aging Periods	Reference Number Checking	Default Department				
30 Days Overdue	Disabled	Customer O User				
60 📮 Days Overdue	O Warning on Duplicate (SO / INV)	Rivel Desertment				
	C Error on Duplicate (SO / INV)	Blank Department				
90 Days Overdue		O Allow O warning O block				
Create a Credit Note	Blank Credit Note Reason	Customer VAT No Per Document				
O From Invoice Document	Allow O Warning O Block	Request VAT No. on Invoices				
Credit Notes Icon		Invoice Value Greater Than: 0.00				
-	Blank Authorization Reason Codes					
Both	Allow Warning Block					
Default Sales Person	Blank Sales Person	Sales Person Processing				
Customer O User	Allow O Warning O Block	O Document Level				
Credit Block On Overdue Invoices	Credit Block On Over Credit Limit	Blank Reference Number				
Sales Invoice Processing	Sales Invoice Processing	Allow O Warning O Block				
Olgnore OWarning OBlock	🔿 Ignore 🔿 Warning 💿 Block					
Ignore Amounts Under 100.00	Ignore Amounts Under 0.00	Default Credit Control for New Customers				
(Local Currency):	(Local Currency):	Use Credit Limit				
Sales Order Processing	Sales Order Processing	Include Open Sales Orders In Available Credit Statistics				
O Ignore Warning O Block	Olgnore Warning OBlock					
Ignore Amounts Under 100.00	Ignore Amounts Under 0.00	Limit Amount: 5 000.00				
(Local Currency):	(Local Currency):	Interest Method				
The Warning or Block Options will	The Warning or Block Options will	Standard Compounded				
Give you the Ability to Convert to a	Give you the Ability to Convert to a	Interest Rate (APR): 22.00 🔦 %				

Default Salesperson Selection Method

We have the ability to define whether we will use the Default Salesperson set at a "User" or at a "Customer" level as the default salesperson on the processing document. Using the default by "User" means that the salesperson assigned during the Users Setup will be used when processing sales documents where the latter will use the setup by Customer or Customer delivery address (explained in more detail below).

Blank Salesperson

This function allows you to Block / Allow or Warn on blank Salespersons on sales processing documents where there are no Salespersons setup for that Account. This is more relevant to Freehand Quotes where there are no default Salespersons setup on the "Freehand Account".

Salesperson Processing by Document or Line

This new feature in Palladium Enterprise V10 allows you to define whether you would like to record the Salesperson for the Document or have the ability to record this by Line item. We would generally allow the recording by line where more than one person is directly involved in the sale.

Item Product Manager Reporting

Should we require the ability to report on Sales or Sales margins by item group or category – we could create a user-defined field for Product Manager and link this person to the Inventory Masterfile and report accordingly through our BI module.



Customer Masterfile

The default Salesperson can be set on the Customer Settings tab as seen below, with an Overriding Salesperson being set at Customer delivery address. What this does is to allow you to now set a default Salesperson per region, that is set once and filtered through to the processing document for ease of use.

ustomer Number: ST004 Name: Edivedere Nursing Home Customer Information Customer Items Contats Shipping Locations Settings Taxes History Optional Fields Tends Street 1 Location Name Street 2 Customer Location Country Delivery Method Distance Street 1: 33 Lane Terrace Street 2: Leeds City: London-South Province: Greater London Province: Greater London Province: Greater London Delivery Method:None Delivery Method:None Delivery Method:None Delivery Method:None Delivery Method:None Distance: 19.00	Name: Belvedere Nursing Home Customer Information Customer Items Contacts Shipping Locations Settings Taxes History Optional Fields Targets Trends Files Notes Linked Customers													
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Reporting

All these Salesperson field are available to you in our Palladium BI and can be added to any excel sales report allowing you to report on the Salesperson (manager) on the Main Account, Salesperson set at the Delivery Address, or simply the Salesperson who processed the transaction.

These are all supported by User-defined fields at Customer Account Level, Document Header level and even at Document line level for a pretty muck unrestricted reporting experience.

