Salesperson Processing

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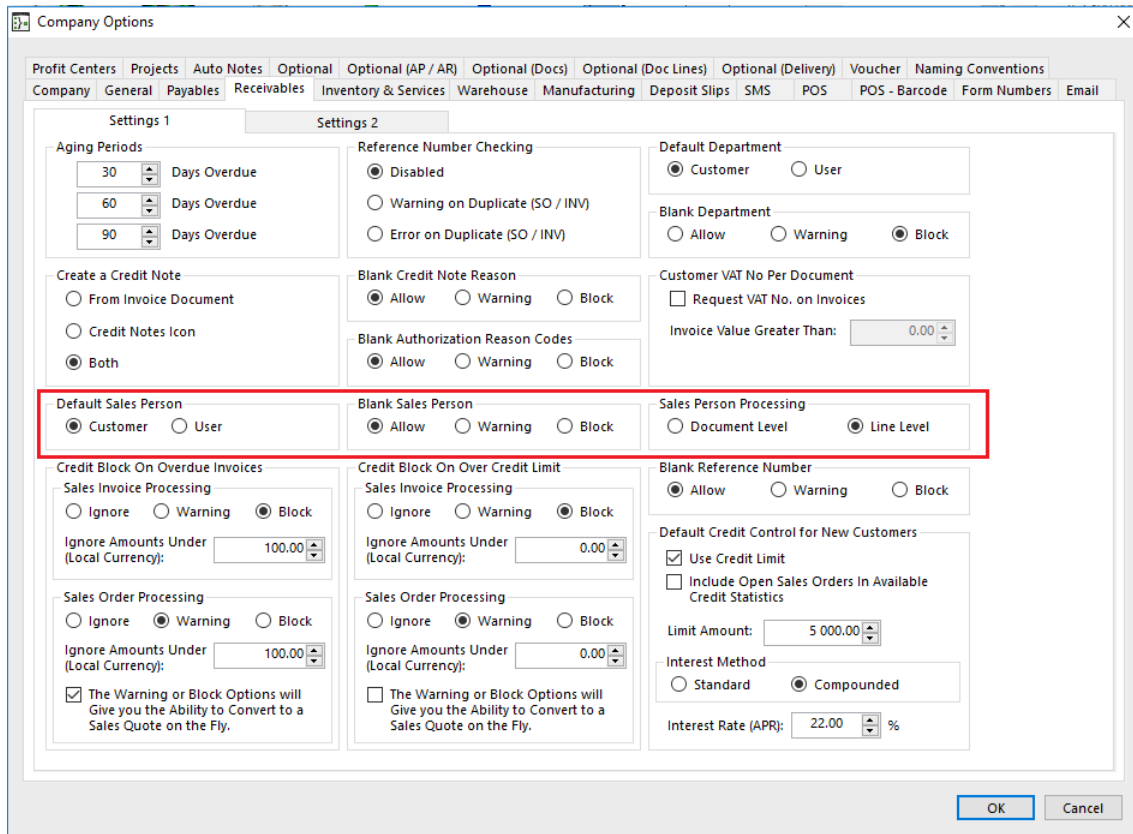
Overview

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:

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.

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.