Smith Sales Rep Module v.4.92

Users Manual

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I. Introduction

The Sales Rep module is integrated with SmithCart and the SmithCart E-Commerce suite. This module can provide your online store with the ability to setup and track Sale Reps selling on behalf of your business.

This manual will guide you step-by-step through installation, setup, and use of the module.

II. Managing Sales Reps

Sales Rep management consists of the following activities:

- Sales Office and Sales Reps Management
- Commission Management
- Creating Sales Regions
- Updating your registry
- Deleting items from your registry

To get started creating Sales Reps load the store admin menu by clicking the "Admin Menu" button at the top of the BuyNow module.

After you click the "Admin Menu" button the Store Admin Menu will load as follows:

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□ Store Dashboard

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Reports

□ Store Setup

Categories

Add Products

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□ Templates

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Endicia Export

UPS WorldShip Export

□ Exit

Exit

To manage, add, or edit Sales Reps click the button titled "Sales Reps" from the Store Admin Menu.

Sales Reps

The next screen displayed will be the Manage Sales Rep screen. If Sales Reps have already been added, a grid will be displayed that lists the Sales Reps/Organizations and allows you choose and configure the following Categories options:

- Add Sales Reps and Organizations
- Edit Sales Reps and Organizations
- Comission Management
- Sales Region Setup

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| Admin Menu | Sales Reps/Organizations | Commission Tiers | Regions | Settings |

Manage Sales Reps and Organizations

		Organization Name	First Name	Last Name	Address	City	Country	State/Region	Postal Code	Email	Phone	Fax	
Edit	Regions	Big Brothers	Dave	smith	,		US	CA					Delete
Edit	Regions	Dave	Dave	Smith	20 kendall, unit b	Laguna	US	CA	92566	dave@smithcart.com	222-222-2222	333-333-3333	Delete

Organization Name: *   [_____]
First Name: [_____]
Last Name: [_____]
Address: [_____]
Address 2:   [_____]
City: [_____]
Country: [United States ▼]
State: [--Select State-- ▼]
Postal Code: [_____]
ID Number: [_____]
Email: [_____]
Phone: [_____]
Fax: [_____]

Notes: [_____]

[Add Organization]

A.   Add New Sales Rep

To add a new Sales Rep and Organization fill in the required fields click the "Add Organization" button.

Organization Name: *	Pemco
First Name:	Mike
Last Name:	Jones
Address:	232 Main St.
Address 2:	Suite 100
City:	Orange
Country:	United States
State:	California
Postal Code:	93434
ID Number:	3984938493843
Email:	mike@pemco.com
Phone:	800-334-3333
Fax:	800-334-2222
Notes:	Responsible for the Southwest region.

Add Organization

III.   Managing Commissions

Commissions allow you to define how much to pay salespeople based on the total amount they sell. SmithCart allows you to define commissions in the following two ways:

1. Commission Tiers by Sales Rep/Office
2. Commission Percentage by Sales Region (country, region, state combo)

A.   Commission Tiers by Sales Rep/Office

Commission Tiers by Sales Rep/Office allow you to define sales volumes and commission percentages by Sales Rep on a sliding scale.

For Example:

Rep #1: 1-10 orders = 10%
Rep #1: 11-20 orders = 20%
Rep #2: 1-10 orders = 5%
Rep #2: 11-20 orders = 8%
Etc, etc

Order quantities (sales volume) and commissions for Sales Reps are reset to zero each month for all Reps.

After you have entered your Sales Reps and Offices, click the "Commission Tiers" button to define your sales rep commission tiers.

| Admin Menu | Sales Reps/Organizations | Commission Tiers | Regions | Settings |

The following Commission Management screen will be loaded:

Manage Commissions Tiers

	Organization Name	Quantity From	Quantity To	Commission Percent	
Edit	RadCo	1	10	11.00	Delete
Edit	RadCo	11	30	16.00	Delete
Edit	RadCo	31	100	20.00	Delete

Organization Name: *   -Select-   ▾

Quantity From: *   [   ]

Quantity To: *   [   ]

Commission Percentage: *   [   ]
Enter percentage without % sign (i.e. 20% is entered as 20)

[Add Commission]

Organization/Sales Rep Name - Select Organization or Sales Rep name to assign commission to.

Quantity From - Enter the "Quantity From" which defines the starting order quantity for the commission tier.

Quantity To - Enter the "Quantity To" which defines the ending order quantity for the commission tier.

Commission Percent – Enter the commission percentage to assign to the commission tier. The commission percentage defines the percent to pay salespeople based on the total amount they sell.

Sales Rep Calculations

Product Wholesale Price – Wholesale price will be used when calculating Sales Rep commissions.

Order quantities (sales volume) and commissions for Sales Reps are reset to zero each month for all Reps.

For programming changes to implement custom business rules please submit a change request here Project Inquiry Form.

B.   Commission Percentage by Sales Region

Sales Region Commission screen allows you to define commission percentages by geographic region (country, region, state combo) Sales Region. To manage Sales Regions, click the "Regions" button as follows:

The following screen will be displayed:

Manage Regions and Commissions

	Region	Commission Amount	Goal	
Edit	US-West Region	15.75	0.00	Delete

To add a new Sales Region click the click the Add Region button and the following screen will be displayed:

Select you country and/or state/region from the list boxes and click the "Add Region" button to save.
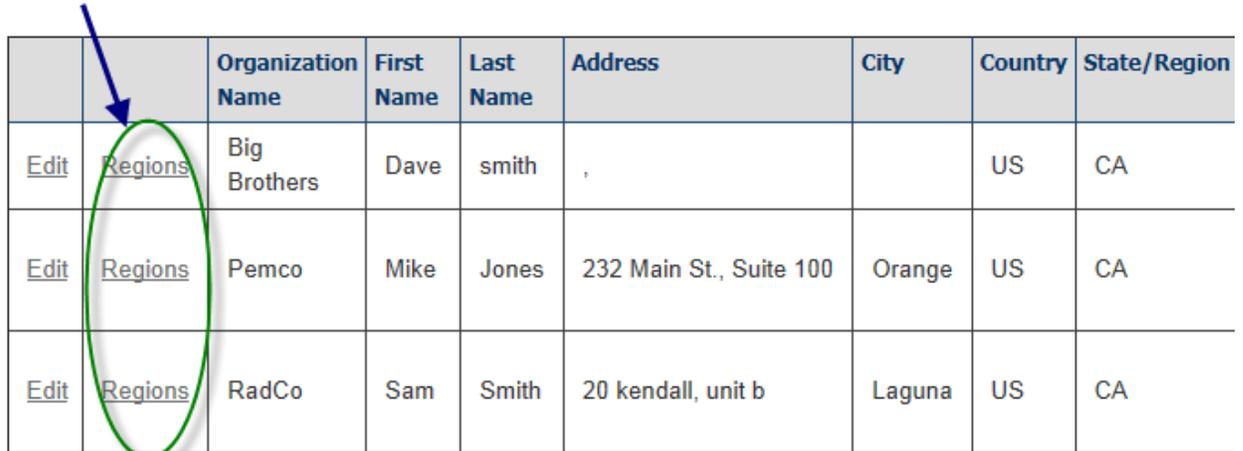
C.   Assigning Sales Reps/Offices to Regions

SmithCart allows you to assign Sales Reps to one or more regions. To assign a Sales Rep to regions click the "Sales Rep/Organization" button from the top menu bar:

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C O N S U L T I N G

The following screen will be displayed:

Manage Sales Reps and Organizations

		Organization Name	First Name	Last Name	Address	City	Country	State/Region
Edit	Regions	Big Brothers	Dave	smith	,		US	CA
Edit	Regions	Pemco	Mike	Jones	232 Main St., Suite 100	Orange	US	CA
Edit	Regions	RadCo	Sam	Smith	20 kendall, unit b	Laguna	US	CA

Click the "Regions" link button to display the Sales Rep/Office Region Setup Screen.

Select the sales regions you want to assign the Sales Rep/Office to and click the "Save" button to save.

D.   Sales Rep Module Settings

The Sales Rep module settings screen you to various custom options in the Sales Rep module. To manage Sales Rep module settings, click the "Settings" button on the top menu as follows:

The following screen will be displayed:

Manage Settings

Save Commission in Order Detail: ☑

Organization Name Field Definition

Please select one of the following fields to use for the "Organization Name" field.

◉ Organization Textbox (Default)
◎ Dropdown List #1 (Defined below)
◎ Dropdown List #2 (Defined below)
◎ Dropdown List #3 (Defined below)

Dropdown List #1 Setup

Show Dropdown #1:   ☐

Dropdown Label #1:   State:

Dropdown SQL #1:

```
Select '- Please select -' as text, '0' as
value
Union All
select distinct(State) as value, State as text
from dnn_WhatGivesData
```

Dropdown List #2 Setup

Show Dropdown #2:   ☐

Filter Dropdown #2:   ☐   (Check to filter dropdown #2 on selected item from dropdown #1)

Dropdown Label #2:   To Benefit:

Dropdown SQL #2:

```
select distinct([To Benefit]) as Text, [To
Benefit] as Value
from dnn_WhatGivesData
where State='[DD1Value]'
```

Dropdown List #3 Setup

Show Dropdown #3:   ☐

Filter Dropdown #3:   ☐   (Check to filter dropdown #3 on selected item from dropdown #2)

Dropdown Label #3:   Charity/Org/School:

Dropdown SQL #3:

```
select distinct(Organization) as text,
Organization as value
from dnn_WhatGivesData
where State='[DD1Value]' and [To Benefit]
= '[DD2Value]'
```

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Save Commission in Order Detail – Check this box to enable the cart to look up, calculate and save commissions in the order detail table upon successful order.

The Save Commission in Order Detail checkbox setting only applies if you are using and setup "Sales Region Commissions" described in section "3B" above.   Please click here to read more about setting up commission percentages by geographic region (country, region, state combo).

Organization Name Definition - Allows you to select if the organization name textbox or the custom drop down list boxes define the organization name data source for calculating commissions in the commission tier model.

Custom Dropdown Lists

- Show Dropdown 1-3 - When checked shows dropdown on the manage sales rep page.
- Dropdown Label 1-3 - Allows you to configure the label next to dropdown
- Dropdown SQL 1-3 - Allows you to enter SQL to query a custom SQL table or DNN lists.

  For example, you could add the following SQL to query the dnn list region table:

  select value,text from Lists where listname = 'Region'

  SQL entered supports the following tokens:

  Dropdown 2 SQL field - Enter token [DD1Value] to filter dropdown #2 based on the selected item in dropdown #1

  Dropdown 3 SQL field - Enter token [DD1Value] and/or [DD2Value] to filter dropdown #3 based on the selected item in dropdown #1 and/or dropdown #2

  The dropdown list filtering feature is useful if you have, for example, 500 Sales Organizations in different regions it allows you to filter your organization list down to a more manageable list when adding sales reps in the manage sales rep screen.

IV. Configuring the BuyNow Module

The following section describes how to configure SmithCart BuyNow settings to work with the Sales Rep module.

To load the BuyNow module settings, navigate to the page with the BuyNow module and click on the "Cart Settings" button:
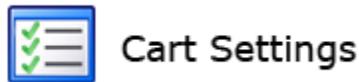
Scroll down to the section titled "General Cart Setup" and expand it. Scroll down to the section titled "DNN Profile Setup"

Save DNN Profile Field – This dropdown list displays all the regular and extended DNN profiles fields defined in your portal. After successful order, if you have defined a "Save DNN Profile Field" the cart will save the designated DNN profile field to the "Smith_Orders" table. The "Save DNN Profile Field" can also be viewed in the Manage Order Details screen.

To tie the order with a Sales Organization do the following::

- Create a new profile field titled "Organization" or "Sales Office"
- From the "Save DNN Profile Field" drop down list select the "Organization" or "Sales Office" field you created.

- Save your settings

The "Organization" or "Sales Office" user profile field can be populated the following ways:
- Sales Rep/Office registers in your portal using the default DNN registration module or the Smith Registration module.
- Importing the data from an ERP or legacy system
- Entering the data manually
- Etc., etc.

V. Commission Calculations on Checkout

The following section describes how Sales Rep/Office Region commissions are calculated on successful checkout and payment in the cart.

A. Sales Rep/Office Commission Tier Calculation

The "Commission Tiers by Sales Rep/Office" commission calculation will calculate commission based on Sales Rep/Office sales volumes on a sliding scale.

1. Setup

In order for the cart to calculate and save commissions using the Sales Rep/Office Commission Tier method you must have the following items configured:

- Sales Rep/Office Commission Tiers setup as described in section "3A" above. Please click here to read more about setting up commission tiers.

- Organization Name Definition radio button list option selected as described in section "3D" above. Please click here to read more about the Organization Name Definition setting.

- BuyNow settings "Save DNN Profile Field" configured as described in the section 4 above. Please click here to read more about the BuyNow settings "Save DNN Profile Field" setting.

2. Commission Calculation

If you have SmithCart and the Sales Rep module configured to calculate Commission Tiers by Sales Rep/Office and Sales Rep completes a successful order in the cart, commission will be calculated as follows:

- The cart will query the currently logged in user profile by DNN login and retrieve the Organization/Sales Rep property configured using the BuyNow settings "Save DNN Profile Field" configured in section 4 above.

- The cart will save the Organization/Sales Rep property field with the order in the "Smith_StoreOrder" table. The Organization/Sales Rep property field is what links the Cart Order with the Sales Rep/Organization and commission tiers defined in the Manage Sales Reps and Commission Tiers screens.

- Product Wholesale Price – The "Wholesale Price" configured for a product in the SmithCart product setup screen is used to calculate commissions as follows:

  Commission = Product Wholesale Price * (Commission Percent / 100)

Because the total commission amount owed to a Sales Rep/Office is dynamic and changing throughout the month based on sales volume and commission tiers, Sales Rep commissions is not saved with each order, but is calculated at the time requested either via reports or the Sale Rep Dashboard module.

Please Note: Order quantities (sales volume) and commissions for Sales Reps are reset to zero each month for all Reps.

B. *Sales Region Commission Calculation*

Sales Region Commission screen allows you to define commission percentages by territory region (country, region, state combo) Sales Region.

1. Setup

In order for the cart to calculate and save commissions by Sales Region you must have the following items configured:

- Save Commission in Order Detail checkbox setting described in section "3D" above. Please click here to read more about Save Commission in Order Detail checkbox setting.

- Sales Region Commissions described in section "3B" above.   Please click here to read more about setting up commission percentages by geographic region (country, region, state combo).

2.   Commission Calculation

If you have SmithCart and the Sales Rep module configured to calculate commissions by Sales Region and a successful order is placed in the cart, order commission will be calculated as follows:

The cart will use the "ship to state/region" and "ship to country" entered by the user during checkout and lookup the commission percent in the "Smith_SalesRepZone" table in the following order:

- **Country and State/Region Lookup** - First, the cart will attempt to look up and find a match on state/region and country. If a match is found the cart will calculate commission based on the commission percentage returned from the state/region and country lookup.

- **Country Only Lookup** - If a commission percentage is not returned from the state/region and country lookup, the cart will attempt to lookup the commission percentage by country only. If a match is found the cart will calculate commission based on the commission percentage returned from the country lookup.

- **All Country Lookup** - If a commission percentage is not returned from the country lookup, the cart will attempt to lookup the commission percentage using the "All Country" option defined in the manage sales region screen. If a match is found, the cart will calculate commission based on the commission percentage returned from the "All Country" lookup.

If a commission percent is returned according to the logic above, the cart will calculate the commission as follows:

Commission = Product Unit Cost * (Commission Percent / 100)

Finally, the commission calculated will be saved in the order detail table.

VI.   Sales Rep Dashboard Module

The Sales Rep Dashboard module allows Sales Reps to login to your portal and view the following information at any time:

- Total Orders for the current month
- Total Commission for the current month
- Run the Sales Rep Commission report to view detail of their orders and commission.

The information listed above will only be displayed for the Sales/Rep/Office that is associated with the user currently logged in.

A.   Adding the Sales Rep Dashboard Module

The Sales Rep module can be added to a single page or all pages in your portal and can be added to any pane on your page.

Navigate to the page in your portal where you want to add the Sales Rep Dashboard module and add the Smith.SalesRep module to the page as follows.

After you add the Smith.SalesRep module to a page you will see the following:

B.   Sales Rep Dashboard Module Settings

To configure the Sales Rep Dashboard module settings, hover your mouse over the module context menu (the drop down arrow in the upper right hand corner of the Sales Rep module container) and choose settings.

The following screen will be displayed:

BuyNow Page Name – Select the page where you have added the BuyNow module. This tells the Sales Rep Dashboard module which page has the BuyNow module on it for retrieving Sales Rep and commission information.

C.   User and Role Setup

The Sales Rep Dashboard module supports the following three type's users:

1. Store Admin – Any DNN user account with administrator privileges.
2. Sales Rep – A registered user that is a member of any DNN role you create to group your Sales Reps.

In order for a Sales Rep to use the module they need to be added to a DNN role you create. The following are some ways to assign a role to a user:

- Sales Rep/Office registers in your portal using the default DNN registration module or the Smith Registration module.
- Assign a role to the user from the DNN Admin User Setup screen.
- Importing the data from an ERP or legacy system
- Etc., etc.

D.   Sales Rep Dashboard Module Report

From the "Sales Rep" module the Sales Rep is able to login and run the report that's associated with their DNN login.

Prior to logging on the Sales Rep module will be displayed as follows:
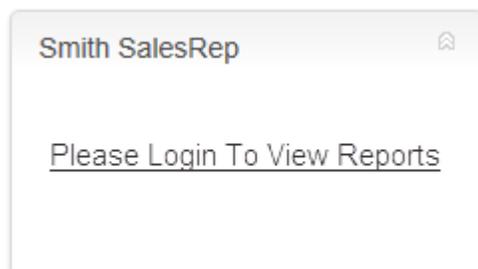
You can also set view permissions to the module to only be displayed when a user is logged in and a member of the proper role.

After the user logs in and is a member of a DNN role you have granted view permissions to the module will be displayed as follows:

Click the "Run Sales Report" to run the Sales Rep Monthly Commission Report .

The report displays order details on sales generated from the Sales Rep and their monthly commissions.

Fields include:
- Sales Rep Nane
- Order Total
- Commission Percent
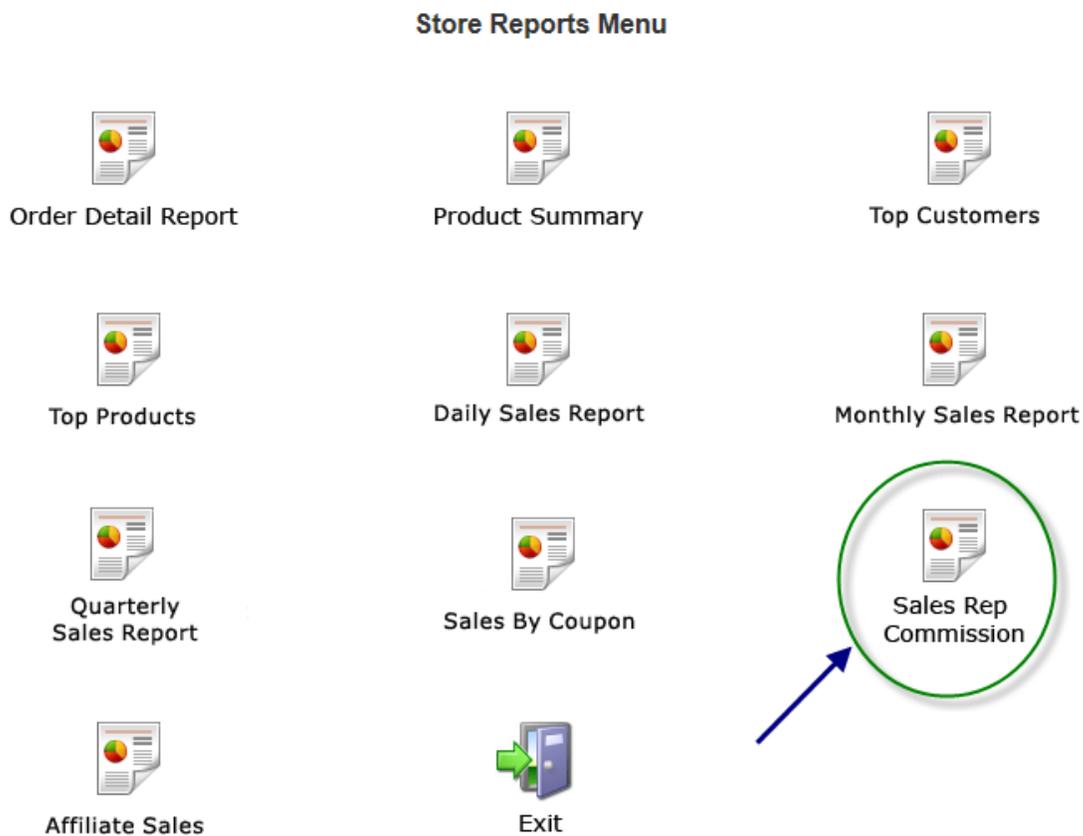- Commission Amount
- Total Commission amount at bottom

Filtering
- Month – dropdown of all the months – default to current month
- Year - dropdown of all the years – default to current year

VII. Sales Rep Module Admin Report

To run the Sales Rep Monthly Commission admin report do the following:

- Login as a portal admin
- Navigate to the Smith Cart Store Admin Menu
- From the Store Admin Menu click the "Reports Menu" button
- From the Reports Menu click the "Sales Rep Commission" button as follows:

Store Reports Menu

Order Detail Report	Product Summary	Top Customers
Top Products	Daily Sales Report	Monthly Sales Report
Quarterly Sales Report	Sales By Coupon	Sales Rep Commission
Affiliate Sales	Exit	

The report displays order details on sales generated from the Sales Rep and their monthly commissions.

Fields include:
- Sales Rep Nane
- Order Total

- Commission Percent
- Commission Amount
- Total Commission amount at bottom

Filtering
- Sales Rep/Office
- Month – dropdown of all the months – default to current month
- Year - dropdown of all the years – default to current year

VIII. Extensions/Customizations

The SmithCart Sales Rep module can be extended to fit your business model. If you're interested in modifying the module, we can help. Please visit http://www.smith-consulting.com and contact sales@smith-consulting.com.