

Agency Sales

Date Released: March 2017

Modules: Navigator Order Management, Navigator File Maintenance, Navigator Invoicing, Night Jobs, AR to GL Interface, Sales to GL Interface.

Description:

Reason for Change:

- Allow search of Job Quotes.
- Support Agency Sales in Navigator OM with screen(s) that calculate and store agency commissions/fees in Navigator OM.
- Create commission structures in Navigator File Management.
- Allow search and entry of architect name in Navigator OM Order.
- Allow search and entry of project name in Navigator OM Order Header.
- Support maintenance on default commission / fees by hierarchical product rules.

Restrictions: Navigator only

Set-up

System Wide Setting - Options for Navigator Agency Sales

```
DISPLAY                               System Wide Settings Maintenance          SYS144FM
Options for Navigator Agency Sales

Navigator Agency Sales

Activate Agency Sales:                 Y      (Y/N)
Omit Agency Sales From Invoice Register: Y      (Y/N)
Omit Agency Sales From Sales to GL Interface: Y      (Y/N)
Omit Agency Sales From AR to GL Interface: Y      (Y/N)
```

Granting Access

Access can be granted at any of the three levels: Global (Nav 1), Authority Class (NAV 2), User (NAV 5).

Use the “A” option for the File Management options.

```

3/01/17          N A V I G A T O R          NV5000R
8:43:35          Application Global Defaults  QPADEV0015

Opt  Web App Description
-----
) Accounting
) Contact Manager
) Credit
) A File Management
) Installations
) Inventory
) Invoicing
) Order Management
) ODS
) Reporting
) Sales Portal
) Spartan Surfaces
) Warehouse

Bottom

Options ==> A=App Options/Permissions
F7=Exit  F10=Navigator Options/Permissions  F11=External Links

```

Enter the Access level; with the highest level being 3 - Mass Update.

```

3/01/17          File Management          FM30001R
8:49:37          File Management Security Maintenance  QPADEV0015
Global..... *GLOBAL

Keys: " " = To Next Level  "0" = Not Allowed  "1" = Inquiry
      "2" = Update          "3" = Mass Update

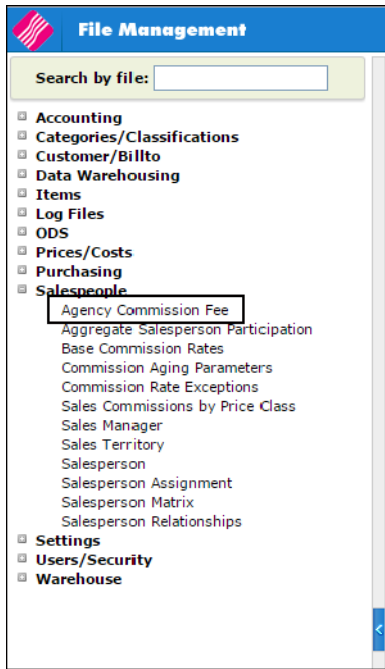
File Description          Access Level
-----
User      Authority Class  Global
-----
- * FILES DASHBOARD *
- Agency Commission Fee
- Aggregate Salesperson Particip
- ABC Codes
- Base Commission Rates
- Billto
- Billto Display Types
- Billto Marketing Programs
- Billto Price Exceptions
- Billto Salesperson Assignments
More...

F6=Return  F7=Exit  F9=Update All  F10=Additional Permissions  F11=Toggle

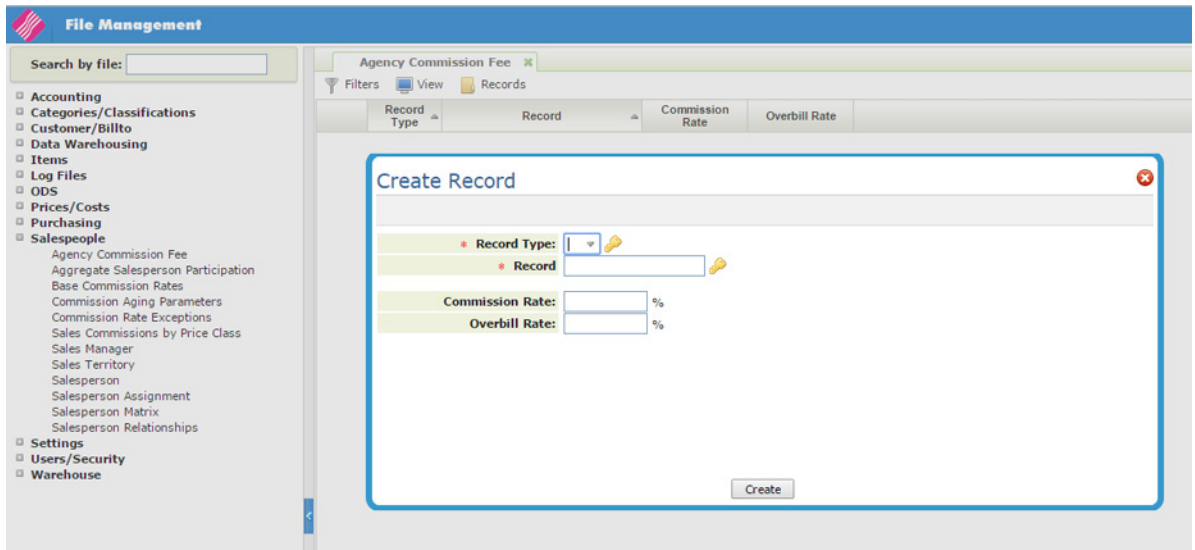
```

Navigator File Management

A new file, **Agency Commission Fee**, has been added under the Salespeople heading.



Select the **Agency Commission Fee** option and click **Create** under **Records** to create a new record.



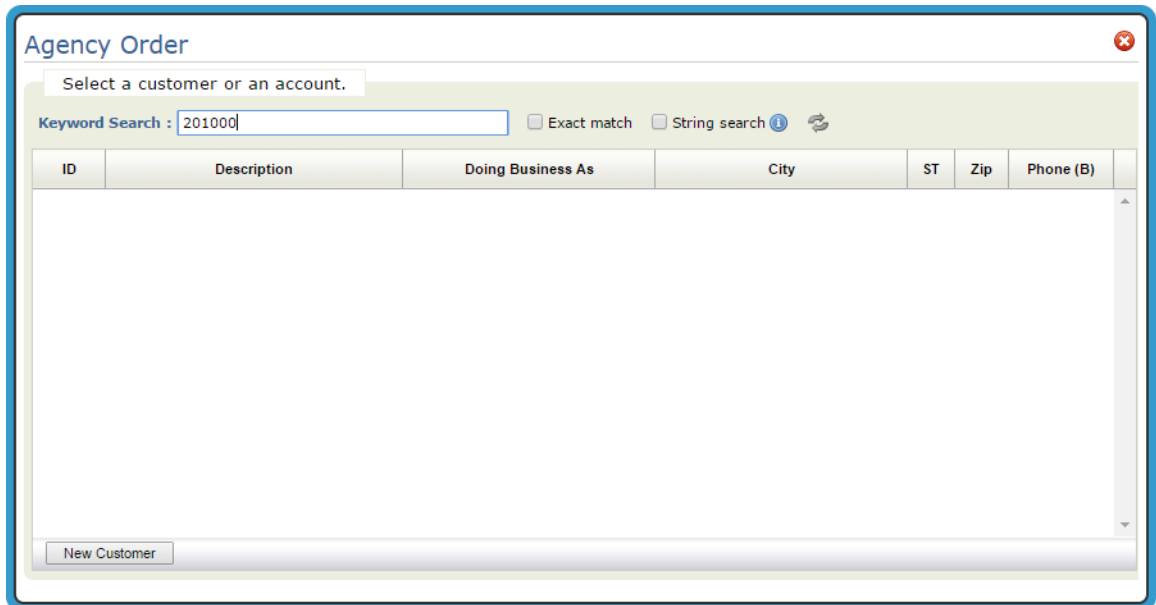
Setting	Description
Record Type	Commission Rates can be set-up by Item, Manufacturer, or Product Line. Hierarchy is Item, Product Line, Manufacturer.
Record	This field changes based on the record type. For example if you select Item as the record type, this title changes over to Item Number.
Commission Rate	Enter, as a percentage, the amount of commission received. For example, for a rate of .0525 enter 5.25.
Overbill Rate	Overbills are extra charges incurred to the customer above and beyond the regular pricing of the material.

Agency Orders in Order Management

1. In the New Order drop down menu, select **New Agency Order**.

The screenshot shows the 'Order Manager' application interface. At the top, there is a blue header with the 'Order Manager' logo. Below the header, there are input fields for 'Reference#' and 'Order#' with 'Submit' buttons. A dropdown menu is open, showing options for 'New Order'. The options are: 'New Customer Order', 'New Quote', 'New Purchase Order', 'New Stock-to-Stock', 'New Direct Ship Order', 'New Credit Order', and 'New Agency Order'. The 'New Agency Order' option is highlighted with a black box. Below the dropdown menu, there are several dropdown menus for 'Company', 'Account#', 'Branch', and 'Warehouse' (set to 'RAL').

2. Enter an Account number.



The screenshot shows a software window titled "Agency Order". At the top, there is a prompt "Select a customer or an account." Below this is a "Keyword Search" input field containing the text "201000". To the right of the input field are two checkboxes: "Exact match" and "String search", along with a refresh icon. Below the search area is a table with the following columns: "ID", "Description", "Doing Business As", "City", "ST", "Zip", and "Phone (B)". The table is currently empty. At the bottom left of the window, there is a button labeled "New Customer".

3. On the Order Header defaults are inserted and protected:

- An “**S**” is entered as the **Order Type**.
- **DIR** is entered in the Warehouse field.

Notice also the 5 new settings near the top of the window.

- The order is set to a non-taxed status.

Edit Header ✖

Reference#: 2045154

Account#: 201000 HARBOR FLOOR 2010 ATLANTIC AVENUE PO BOX 123 RALEIGH, NC 27513 US	Ship To: HARBOR CONSOLIDATORS 15 WEST MILL ROAD ATLANTA, GA 40205 (918) 242-3253
---	---

Project: <input type="text"/>	Architect: <input type="text"/>
Job Quote#: <input type="text"/>	Mfr Order#: <input type="text"/>
Mfr Invoice#: <input type="text"/>	

Order Date: 03/01/17	Enter Date: 03/01/17
PO#: <input type="text"/>	Salesperson 1: <input type="text"/>
Job Name: <input type="text"/>	Salesperson 2: <input type="text"/>
Ship Date: 03/03/17	Branch: RAL DANCICK INTERNATIONAL
Ship Via: OT OUR TRUCK	Warehouse: DIR DIRECT SHIPMENTS
Initials: GB GARY BRANNEN	Supplier: <input type="text"/>

Order Type: S AGENCY SALES ORDER	
Order Handling: 1 FILL/KILL	
Reason Code: BU BUILDER	
Job#: <input type="text"/>	

FOB: W WAREHOUSE	Terms: 2 2% 10TH PROX NT3010TH NEXT MTH
Truck Route: AA ATLANTA SW DAILY	Terms Disc%: 0.00
Truck Stop#: <input type="text"/>	Terms Days: 0
Truck Run#: A	

Cust Price List: LP LIST PRICES	Xref Order#: <input type="text"/>
HndlChrg/Disc%: 0.00	Xref Invoice#: <input type="text"/>

Setting	Description
Project Architect	<p>The project name is written to a message line. If a project is entered the architect and salesperson are automatically imported in.</p> <p>The Project drop down list is populated with projects entered in through the Navigator Projects application.</p> <p>The Architect drop down list is also pulled in from the Navigator Projects application.</p>
Job Quote#	<p>If a Job Quote is entered, it gets inserted onto the order as a message line.</p>

Setting	Description
Mfr Order# Mfr Invoice#	Use these fields to manually enter the Manufacturer's Order and Invoice number. This information can be used when searching for orders and invoices.

4. Click **Save** to access the Order Detail window. On the Order Detail window, you can start entering items or you can click the **Job Quote** button.

Order Manager GBRANNEN Reports ODS Help

Agency Order Reference#: 2045181 Available Options

Account#: 001001 HARBOR FLOOR CENTER (RALEIGH) 2001 ATLANTIC AVE PO BOX 715 RALEIGH, NC 27604-1434 (205) 595-7780	Ship To: HARBOR FLOOR CENTER (RALEIGH) 2001 ATLANTIC AVE PO BOX 715 RALEIGH, NC 27604-1434 (205) 595-7780	Order Date: 03/01/17 PO#: WGB123 Job Name: Ship Date: 03/02/17 Ship Via: OT Initials: GB	Entry Date: 03/01/17 Salesperson 1: Salesperson 2: Branch: RAL Warehouse: DIR Supplier: SAI
---	---	---	--

Add Line: Item#: Quantity: UM: Add Job Quote Multi Line Entry

Line	Item#	Quantity	Unit Price	Extended Price	Ware	Status	Serial#	Location

Messages ORDERS APPROVED BY JACKIE ONLY	Item Total: \$.00	Total Weight: LB
	Terms Discount: \$.00	
	Freight: \$.00	
	Taxes: \$.00	Payments: \$.00
	Order Total: \$ 0.00	Balance Due: \$.00

[Return to Search](#) Complete Order Cancel Order

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5. When **Job Quote** is clicked, quotes/orders already established for the account display.

Job Quote#	Project	Architect	Project Status
500261	Brannen's Shoe Fashions Retail floor space	Professional Architects Inc	Open
500262	Brannen's Shoe Fashions Retail floor space	Professional Architects Inc	Open
500264	Brannen's Shoe Fashions Retail floor space	Professional Architects Inc	Open
500942	Alamance Hospital Lobbies and Cafe	Rustic Design	Open
500943	Alamance Hospital Lobbies and Cafe	Rustic Design	Open
500944	Alamance Hospital Lobbies and Cafe	Rustic Design	Open
500952	Sullivan High Rise Fover for new Sullivan Building in DTR	Marken Architects	Open

6. Select a quote.

Product	Quantity	UM	Unit Price	Extended Price
<input checked="" type="checkbox"/> REXECBR12 ECHO CANYON BRYCE 12X12 YELLOW 703101 V4	30.00	SF	3.120	\$93.60
<input checked="" type="checkbox"/> SAI10900 GENOVA 5" FLORENCE 1/2"X34.455FXRL HICKORY	5.00	CT	75.240	\$376.20
<input type="checkbox"/> ABCKASA6000 KAS CUSTOM RUG 12X16 ITALIA KAS CUSTOM RUG 12X16 ITALIA	1.00	EA	10.500	\$10.50
Total:	35.00		\$78.36	\$469.80

7. Select the items you want to include on the order. Review and make any needed changes.

8. Click **Next** to add the items to the order.

Order Manager GBRANNEN Reports ODS Help

Agency Order Reference#: 2045384 Available Options

Account#: 001001 Ship To: Brannen's Shoe Fashions Order Date: 03/09/17 Entry Date: 03/09/17
 HARBOR FLOOR CENTER (RALEIGH) 2001 ATLANTIC AVE PO BOX 715 RALEIGH, NC 27604-1434 (205) 595-7780
 2500 Maynard Road Cary, NC 27513

PO#: Job Name: Ship Date: 03/10/17 Ship Via: OT Initials: GB
 Salesperson 1: 032 Salesperson 2: Branch: RAL Warehouse: DIR Supplier:

Add Line: Item#: Quantity: UM: Add Multi Line Entry

Line	Item#	Quantity	Unit Price	Extended Price	Ware	Status	Serial#	Location
10	REXECBR12 ECHO CANYON BRYCE 12X12 YELLOW 703101 V4	30.00 SF 3.00 CT	\$3.120	\$93.60	DIR			
20	SAI10900 GENOVA 5" FLORENCE 1/2"X34.45SFXL HICKORY	50.00 SF 5.00 CT	\$75.240	\$3,762.00	DIR			

Messages: ORDERS APPROVED BY JACKIE ONLY

Item Total:	\$	3,855.60	GP\$	259.80	GP%	6.74
Terms Discount:	\$	.00	Total Weight:	320.00	LB	
Freight:	\$	.00	Payments:	\$	.00	
Taxes:	\$	.00	Balance Due:	\$	3,855.60	
Order Total:	\$	3,855.60				

Return to Search Complete Order Cancel Order

After the line is added the price and cost are transferred to the commission screen. The cost on the order line is overlaid with the price and both fields are locked down. These fields can only be updated on the commission screen. If the sell price is updated the price and cost are updated on the order to this value.

9. The commission for the sale shows up as a negative Cost Allowance and can be accessed by:
- editing a line and then clicking the down arrow to expand the information at the top of the window.

Edit Line 20 Reference#: 2045384 Account#: 001001 HARBOR FLOOR CENTER (RALEIGH)

Item#: SAI10900 Quantity: 50.00 UM: SF

Description: GENOVA 5" FLORENCE Lot: Warehouse: DIR
 1/2"X34.45SFXL HICKORY Price: 75.240 Serial#: Location:
 Special Order: Extended Price: 3762.00

Supplier#: Price List: LP Restriction Code:
 Ship Via: Price Method: X Received?:
 FOB: Cost: 75.240 Restock%:
 Direct Ship: Yes No Extended Cost: 3502.20 Crdt/Cmsn Code:
 Ship Date: 03/10/17

Points: Price Allowance: Cost Allowance: -5.196 Price Promo:
 Marketing Pgm: Funds: Cost Promo:
 Terms: Fund Promo:

Messages: No Broken CT. Comments: NO BROKEN CARTONS

Inventory Inventory Analysis

Serial#	Shade	Ware	Quantity Available	UM	Status	Location	Quantity	UM	Other Ref#	Lot	Quantity Onhand	Quantity Allocated
Sort By: Bin Location UM: SF Refresh Future show/hide totals												

Update

- scrolling to the right to display the **Cost Allowance**

Line	Item#	Quantity	Unit Price	Extended Price	Cost Allowance	Fund Promo	Fund\$	Points	Extended Points	Fund Program
10	REXECBR12 ECHO CANYON BRYCE 12X12 YELLOW 703101 V4	30.00 SF 3.00 CT	\$3.120	\$93.60						
20	SAH0900 GENOVA 5" FLORENCE 1/2"X3/4 45SF XRL HICKORY	50.00 SF 5.00 CT	\$75.240	\$3,762.00	-\$5,196					

10. If a line does not have a Cost Allowance, such line 10 above, you can use the **Agency Commissions** option accessed via the **Available Options** drop down to add commission and overbill rates.

You can also use the Agency Commissions option to edit existing commission and over bill rates.

Note: Commission and Overbill rates can be set up at the item, product line, or manufacturer level. Hierarchy is Item, Product Line, Manufacturer. For more information, refer to Navigator File Management on page 141.

11. Add or edit the **Commission** and **Overbill** rate.

Updating any field causes the rates and total fee to recalculate to the new value.

Note: Any quantity changes are done on the Order Management Edit Order Line screen.

Use the options **Apply to items without rates previously applied** and **Apply to all items(overwrite any existing rates)** near the top of the window to control how any new rates are applied.

Agency Commissions

UPDATE ORDER ^

Commission Rate % Overbill Rate %

Apply to items without rates previously applied Apply to all items (overwrite any existing rates)

UPDATE INDIVIDUAL LINES ^

Line	Item#	Qty	Sell Price	Trade	COMMISSION		OVERBILL		Total
					Rate	Value	Rate	Value	
10	REXECBR12 ECHO CANYON BRYCE 12X12 YELLOW 703101 V4	30.00	\$ 3.12	\$ 3.25	0.00 %	\$ 0.00	0.00 %	\$ 0.00	\$0.00
20	SAI10900 GENOVA 5" FLORENCE 1/2"X34.45SFXL HICKORY	5.00	\$ 75.24	\$ 3.46	5.00 %	\$ 18.81	2.00 %	\$ 7.17	\$25.98

Total Commission \$18.81
Total Overbill \$7.17
TOTAL \$25.98

The **Sell Price** and **Trade Price** gets imported in from the order.

The **Commission** and **Overbill** information is imported in from File Management; if a record exists for the item or product line.

12. Any changes made are reflected on the order.

Order Manager

GBRANNEN Reports ODS Help

Agency Order Reference#: 2045384 Available Options

Account#: 001001
HARBOR FLOOR CENTER (RALEIGH)
2001 ATLANTIC AVE
PO BOX 715
RALEIGH, NC 27604-1434
(205) 595-7780

Ship To:
Brannen's Shoe Fashions
2500 Maynard Road
Cary, NC 27513

Order Date: 03/09/17
PO#:
Job Name:
Ship Date: 03/10/17
Ship Via: OT
Initials: GB

Entry Date: 03/09/17
Salesperson 1: 032
Salesperson 2:
Branch: RAL
Warehouse: DIR
Supplier:

Line	Item#	Quantity	Unit Price	Extended Price	Cost Allowance	Fund Promo	Fund\$	Points	Extended Points	Fund Program	Term Overri
10	REXECBR12 ECHO CANYON BRYCE 12X12 YELLOW 703101 V4	30.00 SF 3.00 CT	\$3.120	\$93.60	-\$153						
20	SAI10900 GENOVA 5" FLORENCE 1/2"X34.45SFXL HICKORY	5.00 SF 0.50 CT	\$75.240	\$376.20	-\$5.196						

Messages
ORDERS APPROVED BY JACKIE ONLY

Item Total: \$ 469.80
Terms Discount: \$.00
Freight: \$.00
Taxes: \$.00
Order Total: \$ 469.80

GP\$ 30.57 GP% 6.51
Total Weight: 140.00 LB
Payments: \$.00
Balance Due: \$ 469.80

GP\$ = total commission from the commission screen.

GP% is calculated using this value as GP\$.