

Salesperson Setup and Permissions

To setup a new salesperson or change permissions for an existing salesperson, select Accounts Receivable from the Main Menu. From the Accounts Receivable menu, select Salesperson.

The Accounts Receivable Salesperson screen determines what each individual is allowed to do in Point of Sale. It also determines the commission calculations for each salesperson. Each individual is set up with an ID and a password. On the main Point of Sale screen, the individual will sign in using his/her password.

When adding several new salesperson records, you can press **[F2]** for a partial clear after adding the first salesperson. This will clear or "blank out" the Salesperson #, Name and Password, but all other fields remain. Enter the next salesperson #, name and password. Press ENTER through all remaining fields if the new salesperson record should have the same permissions as the previous salesperson. Change any fields where permissions should be different.

After responding "Y" to the "Ok to Add Record" prompt, a message will display "Remember to create salesperson analysis records before the next daily close." The daily close program will automatically track sales for each salesperson by vendor code. It is typically NOT necessary to create salesperson analysis records to track sales at a more detailed level. Contact Mylee Customer Support for more information.

The example shown below is typical for a salesperson. Salesperson permissions should be modified as needed.

MM/DD/YYYY	ACCOUNTS RECEIVABLE SALESPERSON	SALE NO.
Salesperson #: SP	Name: SAMPLE SALESPERSON	Password: 01
Commission: P	Allowable Order Types: LQ	
Default Comm: 0.00	Allowable Status Flags: BDILMPQR	
	Allowable Override Flags: ABCLPQS	
Maximum Line Discount Percent: 10.01	Maximum Total Page Discount: 10.01	
Displayable Prices in Inquiry: ABC	Allow Unlocking Orders N (Y,N)	
Allow changes to -- Cust. Price Level %: N	Other Cust.Flags: Y	Posting SLS: N
Allow Deleting Orders: P	(Yes, No, P=orders not Printed)	
Allow : Line Discount: Y	LBR : Y	Tax Flag: Y Price/Cost: Y (YNBC)
Changes: Total Discount: Y	Edit Payments: Y (Y,N or Closed)	
Allow Overrides: LBR : Y	Credit: N (YNEB)	Payment Disc: N Deposits: N
Allow Entry Into: POS Cash: N	Spec Order Create: P (Y,N,P,R)	Str Xfer Y (Y,N)
A/R Note access: R (R, W or blank)	A/R Note level: 5 (0-9)	
Allow Customer Pickup/Deliver B (P, D, Both or blank)		
F2=PARTIAL CLEAR F7=NEXT ITEM BY		
OK TO ADD RECORD? (Y OR N)		

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Salesperson # - Enter a two-character ID for the individual. Initials are a common ID.

Name – Enter the first and last name of the individual.

Password - Enter a 2-character password for this individual. Many make this the same as the ID.

Commission – The commission field allows one character, an “S” for commission on sales, a “P” for commission on profits, or an “N” for no commission.

Allowable Order Types – This field regulates the type of orders a salesperson is allowed to open or read. Press [F1] to see a listing. For most salespeople, “L” for Lighting order and “Q” for Quote are the only entries needed.

Managers and accounting personnel should be coded with LQABCDP. This will allow such users to enter Debit adjustments, Credit adjustments, service Charges, Disbursements, and apply Payments to accounts receivable customers.

Default Comm: - Enter the commission rate for that salesperson, if applicable.

Allowable Status Flags: - These flags represent entries a salesperson can make in the “Fig: _” field on the Point of Sale Line Item screen as an item is sold. A list is available on screen by pressing [F1] for help. The valid allowable status flags are: BDILMPQR:

- B - Backorder complete order quantity
- D - Defective Exchange/no charge/reduce QOH only
- I - Do not post to inventory QOH or sales
- L - Labor only charge/does not post inventory QOH
- M - Message line, no price or extension
- P - Partial backorder or backorder partial quantity
- Q - Do not post to inventory QOH
- R - Defective return/post to sales only

Allowable Override Flags: The allowable override flags represent functions a salesperson is allowed to perform when the item has an Insufficient Quantity Available to Sell. A list is available on screen by pressing [F1] for help. All salespersons may choose “N” to “not sell” a line item. Valid allowable override flags are:

INSUFFICIENT QAV - Alternate Sell Lost speCial Bko Partialbko Nosale Qrv -

- A - Alternate item number can be sold
- S - Force Sell an item
- L - Record the line item as a Lost sale
- C - Special order the line item
- B - Backorder the line item
- P - Partial backorder the line item
- Q - Perform a Quantity Reserve Search

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Maximum Line Discount Percent: - This is the maximum amount a salesperson may discount on any line item. For a particular percentage to be allowed, add .01%.

Maximum Total Page Discount: - This is the maximum total page (bottom-line) discount a salesperson is allowed to enter. Add .01% to the maximum.

Refer to the Help screens for information on the remaining fields.

Page 1 of this document provides a screen display for a typical salesperson (e.g. floor salesperson, outside salesperson).

Below is a sample salesperson screen that can be used as a guide when setting up a salesperson record for accounting personnel, store managers, owners and for the person designated as the Tag-n-Trak System Administrator. Typically, these users are set up with full permissions. These should be modified to fit the needs of your company.

MM/DD/YYYY	ACCOUNTS RECEIVABLE SALESPERSON	SALE NO.
Salesperson #: MG	Name: SAMPLE MANAGER	Password: 02
Commission: N	Allowable Order Types: LQABCDP	
Default Comm: 0.00	Allowable Status Flags: BDILMPQR	
	Allowable Override Flags: ABCLPQS	
Maximum Line Discount Percent: 50.01	Maximum Total Page Discount: 50.01	
Displayable Prices in Inquiry: ABDC	Allow Unlocking Orders Y (Y,N)	
Allow changes to -- Cust. Price Level %: Y	Other Cust.Flags: Y	Posting SLS: Y
Allow Deleting Orders: Y	(Yes, No, P=orders not Printed)	
Allow : Line Discount: Y	LBR : Y	Tax Flag: Y
Changes: Total Discount: Y	Price/Cost: B (YNBC)	
	Edit Payments: C (Y,N or Closed)	
Allow Overrides: LBR : Y	Credit: B (YNEB)	Payment Disc: Y
	Deposits: Y	
Allow Entry Into: POS Cash: Y	Spec Order Create: P (Y,N,P,R)	Str Xfer Y (Y,N)
A/R Note access: W (R, W or blank)	A/R Note level: 9 (0-9)	
Allow Customer Pickup/Deliver B (P, D, Both or blank)		
F2=PARTIAL CLEAR	F7=NEXT ITEM BY	