

DESCARTES™ Aljex

*Sales Rep End-User Documentation
Last Modified 4/25/19*

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Version Control

Change By	Date Changed	Version
Brian Easton	4/22/19	V1
Craig Wiley	4/26/19	V2

Prerequisites:

User must have access to the Setup Menu in Vision (User Setup > "Access User File" setting = Yes)

General

- Sales Rep Menu is located in Setup Menu > Sales Reps:

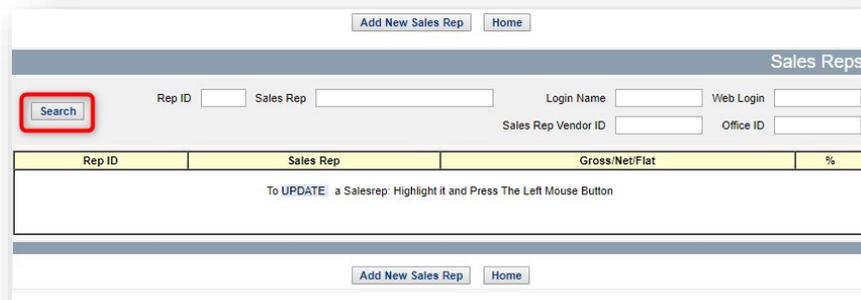


- Sales Commissions vs. Dispatch Commissions:
 - **Sales Commissions:** Sales reps will be assigned to customers. Any loads for that customer can have sales commissions paid as a flat amount or percentage of that load to the rep assigned.
 - **Dispatch Commissions:** Commissions can be generated for a Sales Rep Entering or Covering a shipment
 - i. Can be a % or Flat amount
 - ii. Can be paid to Actual or Assigned Dispatcher

Functionality:

Search Sales Reps:

- Sales Reps can be filtered by Rep ID, Sales rep Name, Login Name, Vendor ID, Web login, or Office ID.
- Choose filter criteria **OR** leave selections blank to Search All. Click 'Search' to display results:

A screenshot of the 'Sales Reps' search interface in Vision. At the top, there are two buttons: 'Add New Sales Rep' and 'Home'. Below them is a search bar with the text 'Sales Reps'. The search bar contains several input fields: 'Rep ID', 'Sales Rep', 'Login Name', 'Web Login', 'Sales Rep Vendor ID', and 'Office ID'. A 'Search' button is highlighted with a red box. Below the search bar is a table with the following columns: 'Rep ID', 'Sales Rep', 'Gross/Net/Flat', and '%'. The table is currently empty. Below the table, there is a message: 'To UPDATE a Salesrep: Highlight it and Press The Left Mouse Button'. At the bottom, there are two buttons: 'Add New Sales Rep' and 'Home'.

Update Sales Rep:

- To update or view details of a particular Sales Rep, choose their name from the list (after searching) to open their profile. Be sure to SAVE when finished updating:

Rep ID	Sales Rep	Gross/Net/Flat	%
ABC	1 ST USA TRUCKING CO		
AG1	AGENT1	G	10.00
KT	BILLY BLANKS	N	10.00
100	D & H LLC		
DEF	DDD TRUCKING COMPANY		

Sales Rep

Name: BILLY BLANKS
Rep ID: KT
Login: ROOT
Web Login:
Email Address: WOW@ALJEX.COM
Assigned Disp:

Retired:
Office:
Web Password:
AR Collector:
Service Rep:

Vendor Information

Legal Name:
Address: 123 FOUR TH ST
Address 2: 78 ONE A VE
Zip: 32765 City: OVIEDO State: FL
Phone: (999) 999-9999
Fed ID: 123-45-7878 F/S: S:
W9 on File: Send 1099:

Copy company info to Pay To fields:
Checks Paid to: BILLY BLANKS
Address: 123 FOUR TH ST
Address 2: 78 ONE A VE
Zip: 32765 City: OVIEDO State: FL
Phone: (999) 999-9999

Email Notifications

Email Quotes Credit Changes Low Brokerages Commission Report
 Email Tags Short Pays Cust AR Aging Shipment Report

Commission Setup

Commission % Gross, % Net or Flat: % Net
Commission Flat Amount:
Overhead Deduction Flat:
Overhead Deduction %:
House Minimum Profit %:
Minimum % Before Commission:
Create on Invoicing, Payment Rec or Release: Released
Expense from Actual/Projected: Projected

Commission Percentage: 10.00
House Minimum Profit Flat Amount:
Overhead Deduction:
Minimum Gross Profit Before commission:
Minimum Commission Amount:
No Commission if Paid After X Days:
Revenue/Exp Line Haul Only:

Add New Sales Rep:

- Select 'Add New Sales Rep' from top or bottom of Sales Rep interface. This will launch a blank Sales Rep profile to be populated with Sales Rep's info.
 - *No longer need to manually add Sales Reps to Vendor File, the Sales Rep record **will automatically create a new Vendor Record** (if necessary) with the info provided in the 'Vendor Information' section.

The screenshot shows the 'Sales Reps' interface. At the top, there are two buttons: 'Add New Sales Rep' (highlighted with a red box) and 'Home'. Below this is a search area with fields for 'Rep ID', 'Sales Rep', 'Login Name', 'Web Login', 'Sales Rep Vendor ID', and 'Office ID', along with a 'Search' button. A table with columns 'Rep ID', 'Sales Rep', 'Gross/Net/Flat', and '%' is shown, with a message: 'To UPDATE a Salesrep: Highlight it and Press The Left Mouse Button'. At the bottom, there are two more buttons: 'Add New Sales Rep' (highlighted with a red box) and 'Home'.

- Required fields are highlighted with a yellow background. Users cannot save new Sales Reps without first completing all required fields.

The screenshot shows the 'Sales Rep' profile form. The top navigation bar includes 'Customers' and 'Carriers' tabs. A message from 'oh59.aljex.com says' indicates 'Fields Highlighted in Yellow Must Be Filled in'. The form is divided into several sections: 'Sales Rep' (Name, Rep ID, Login, Web Login, Email Address, Assigned Disp, Retired, Office, Web Password, AR Collector, Service Rep), 'Vendor Information' (Legal Name, Address, Address 2, Zip, City, State, Phone, Fed ID, F/S, V9 on File, Send 1099, Checks Paid to, Copy company info to Pay To fields), 'Email Notifications' (Email Quotes, Credit Changes, Low Brokerages, Commission Report, Email Tags, Short Pays, Cust AR Aging, Shipment Report), and 'Commission Setup' (Commission % Gross, % Net or Flat, Commission Flat Amount, Overhead Deduction Flat, Overhead Deduction %, House Minimum Profit %, Minimum % Before Commission, Create on Invoicing, Expense from Actual/Projected, Commission Percentage, House Minimum Profit Flat Amount, Overhead Deduction, Minimum Gross Profit Before commission, Minimum Commission Amount, No Commission if Paid After X Days, Revenue/Exp Line Haul Only). At the bottom, there are 'Save', 'Back', and 'Home' buttons.

- **Sales Reps info** Field Descriptions:
 - 'Rep ID': Choose a unique 3-character
 - 'Login': Sales Rep's login to Aljex TMS, this is how Dispatch Commissions will be created. Reference the Sales Rep's 'User Profile' if you do not know this information off hand.
 - 'Web Login' and 'Web Password': the credentials the Sales Rep would use to login to the Sales Rep Portal if they will be using that feature. You can assign a login and password for this sales rep to login remotely to see info on their own active shipment as well as activity reports for their loads. (optional)
 - 'Retired': used to disable the Sales Rep when they are no longer active for your company. This is the equivalent of deleting a rep.
 - 'Agent Office': If this sales rep is associated with a particular Agent Office, enter that 2-digit office code here
 - 'AR Collector': name of who collects for this rep
 - 'Assigned Dispatcher': name of a dispatcher assigned for this reps accounts

- **Vendor Information**
 - 'W9 on File' and 'Send 1099' are formatted to accept 'Y' for Yes or 'N' for No.
 - There is a check box option to copy Sales Rep info to pay to fields. If the checks will be payable to the Sales Rep, select this option to copy the info.

- **Email Notifications:**
 - Select the Email Notifications to be sent to this Rep's Email address on file

Commission Setup (Only applies to Sales Commissions)

• **Required Fields:**

- **Commission % Gross, % Net or Flat:** Will this rep's commissions be calculated on Gross Profit, Net Profit, or will you paying them a flat rate? Choose the option that corresponds to the pay option.
- **Commission Percentage:** If paying on Gross or Net, what will be the percentage paid for commissions?
- **Commission Flat Amount:** If paying a flat rate, enter that amount here.
- **Create on Invoicing, Payment Rec or Release:** When do you want the sales reps commission record to be generated?
 - Choose 'Invoicing' if you want the record to be generated once the invoice is sent out to the customer.
 - Choose 'Payment Rec' if you want the record to be generated once payment is received from the customer
 - Choose 'Release' if you want to record to be generated once the shipment is released to accounting.
- **'Expense from Actual/Projected':** Do you want this rep's commissions to be calculated based on Actual Expense or Projected Expenses?
 - *We strongly suggest Projected. Here's why: let's say for some reason a carrier is not paid for a shipment. In this case, the actual expense is now \$0 and the gross profit is 100%. This rep will now be paid on the entire gross profit instead of the projected profit which included that carriers pay.

• **Optional Fields:**

- 'House Minimum Profit Flat Amount': the amount that must be the profit before commissions are paid for that shipment. This will cause negative commissions if profit is short of that minimum
- 'House Minimum Profit %': Takes a % off the revenue and then puts that calculated amount into the 'Minimum House Profit Flat Amount' field
- 'Overhead Deduction': Is there an amount you will be taking off the top, before paying out the commission?
 - Choose if the deduction will be a % or a flat amount from the 'Overhead Deduction' drop down.
 - Fill in the corresponding 'Overhead Deduction %' OR 'Overhead Deduction Flat Amount'
- 'Minimum Gross Profit Before Commission': Is there a certain amount of profit that needs to be made before the rep is eligible for commission payout? If so, enter that amount here.
- 'Minimum % Before Commission': Is there a certain percentage of profit that needs to be made before the rep is eligible for commission payout? If so, enter that % here.

- 'Minimum Commission Amount': the minimum amount the rep can be paid for Sales Commission
- 'No Commission if Paid After X Days': if you marked the rep to be paid once payment is received from the customer and you do NOT want to payout commissions if payment is received after a certain amount of days (for example, if the customer doesn't pay for 90 days, or 120 days) enter the amount of days here. If this does not apply, leave blank.
- 'Revenue/Exp Line Haul Only': Do you want this rep to be paid commission on Line Haul profit only, or do you want to include accessories?
 - This would include fuel surcharge, and anything that is charged to the customer/paid to the carrier in addition to the line haul.

Assign Sales Reps to Customers (Sales Commissions Setup):

- Sales Reps will generate **Sales Commissions** based on the structure established in their **Sales Rep file** for any shipments assigned to the customer, once Sales Rep has been assigned through Customer Profile.
- Open Customer File for customer to be associated with that Rep
- Scroll down to 'Sales Rep and Service Rep' sub-section
- Enter in the Sales Rep Name and choose selection from drop-down. Ensure the correct Rep ID is associated with the Sales Rep selected:

- 'Commission End Date' field can be utilized if you would like to set up a rep to only receive commissions for a particular customer for a fixed length of time.

Dispatch Commission Setup

- Sales Rep will generate **Dispatch Commissions** for creating or covering shipments based on the structure established in their **User File**
 - Rep must be added to the Sales Rep File (with all required fields) prior to establishing Dispatch Commissions.
 - To setup Dispatch Commissions for a Rep, open the User File (Setup > User Setup > Select User) for the 'Login' name associated with the Sales Rep File (example below)

Sales Rep

Name: Frank Bootz

Rep ID: JBB

Retired:

Office:

Web Password:

AR Collector:

Service Rep:

Assigned Disp:

Web Login:

Email Address:

Login: ANRO222

Accounting	Setup	View / Refresh	Admin	Load
	Company Setup			
	User Setup			
	Sales Reps		Sales Rep	
	Set Required Fields			

Users

User	Login	Password	Phone	Fax	Email	Agent ID	Delete
DURRETT, DERRELL	ajx_derr		X				Delete
WHITE, BRIAN	albkw		(732) 357-8700 X 15		brian@aljex.com		Delete
THEMAN, KEVIN	anro1		X				Delete
ROX, ROBO	anro11		X				Delete
BOOTZ, FRANK	anro222		X				Delete
REP. DEMO	anro45		(732) 266-8888 X 99				Delete

- Within the User File, scroll to 'Pay' sub-section. There are 4 different types of Dispatch Commissions which can be setup:
 - **Enter Load Commission Net %**: Net % of profit Sales Rep will receive for CREATING SHIPMENTS
 - **Enter Load Commission Flat \$**: Flat Commission amount Sales Rep will receive for CREATING SHIPMENTS

- **Cover Load Commission Net %:** Net % of profit Sales Rep will receive for COVERING SHIPMENTS
- **Cover Load Commission Flat \$:** Flat Commission amount Sales Rep will receive for COVERING SHIPMENTS
- Other Options:
 - `Enter Load Minimum Commission`: minimum commission amount to be paid for CREATING SHIPMENTS
 - `Cover Load Minimum Commission`: minimum commission amount to be paid for COVERING SHIPMENTS
 - `Minimum Gross Profit Before Commission`: Is there a certain amount of profit that needs to be made before the rep is eligible for dispatch commission payout? If so, enter that amount here.
 - `Minimum % Before Commission`: Is there a certain percentage of profit that needs to be made before the rep is eligible for dispatch commission payout? If so, enter that amount here.