



Process Documentation

Department:

Customer Support

Last Updated:

4/7/2025 10:11 AM

NAME OF PROCESS

Creating/Updating a Sales Representative [Roleplay]

Use Case / Objectives

This guide will help you enter a new sales representative in the system and update details for an existing one.

To navigate to a specific section, select from the hyperlinks below:

[Create New Sales Representative](#)

[Update Sales Representative](#)

Configuration, Training, and Reporting

This document assumes you know how to perform basic search functionality to find information in the system (i.e. F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

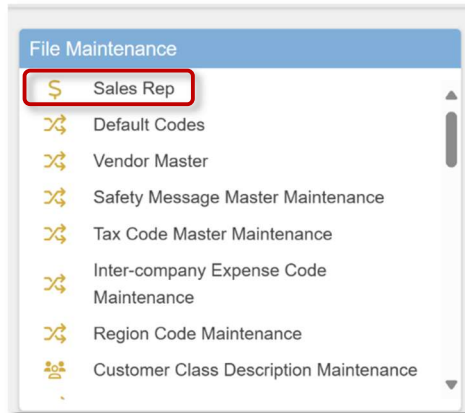
Menu options to access:

Cross Application File => Sales Rep

Creating or Updating a Sales Representative

Creating a Sales Representative

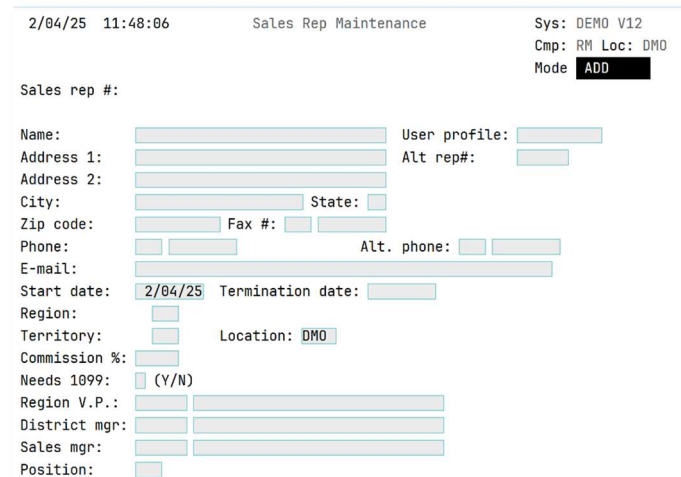
1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Cross Application File** screen does not appear automatically, select Cross Application File from the left toolbar.
3. In the **File Maintenance** section, click on Sales Rep.



- a. The **Sale Rep Maintenance - Launch** screen displays.



4. Press F6 on your keyboard or click on F06 Add in the **Display Functions** menu.
 - a. The **Sales Rep Maintenance - Detail** screen displays.

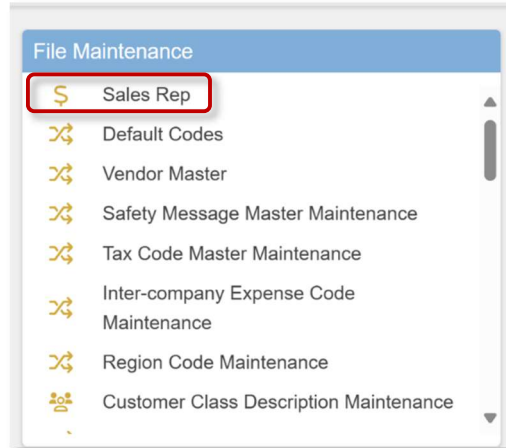


5. Type in the new sales representative's personal information.
6. Type in the *User Profile* field or press F4 to search and select.
7. The *Start Date* field defaults to the current date but can be updated if necessary.
8. Enter a *Region* and a *Territory* in the corresponding fields.
9. In the *Commission %* field, type the desired commission or press F8 to enter a detailed commission schedule. Press Enter when complete.
10. Update the *Needs 1099* field, if necessary.
11. Type in the *Region V.P.*, *District mgr*, and *Sales mgr* fields or press F4 to search in each field.
12. Type in the *Position* field.
13. Press Enter to continue.
14. Review data on the screen, making updates if necessary. Press Enter to add the record.
15. Sales representative is added to the system and the **Sales Rep Maintenance** screen displays.

Updating a Sales Representative

NOTE: if the **Sales Rep Maintenance** screen is already displayed, skip to step 4 below.

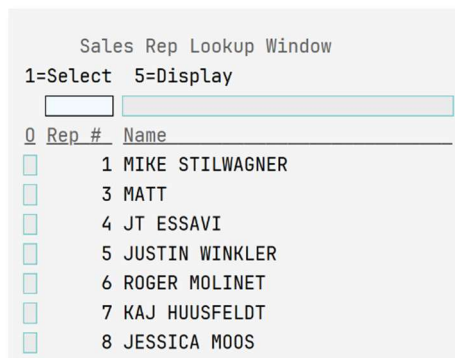
1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Cross Application File** screen does not appear automatically, select Cross Application File from the left toolbar.
3. In the **File Maintenance** section, click on Sales Rep.



- a. The **Sale Rep Maintenance** screen displays.

A screenshot of the 'Sales Rep Maintenance' screen. At the top, it shows the date and time '2/04/25 09:35:28', the title 'Sales Rep Maintenance', and system information 'Sys: DEMO V12' and 'Cmp: RM Loc: DMO'. Below this, there is a label 'Sales rep #' followed by an empty text input field.

4. If you know your sales representative's number, you can type it in the field or press F4 to open the **Sales Rep Lookup Window**.

A screenshot of the 'Sales Rep Lookup Window'. It shows a title bar 'Sales Rep Lookup Window' and instructions '1=Select 5=Display'. There are two empty text input fields. Below them is a table with columns 'Rep #' and 'Name'. The table contains the following data:

Rep #	Name
1	MIKE STILWAGNER
3	MATT
4	JT ESSAVI
5	JUSTIN WINKLER
6	ROGER MOLINET
7	KAJ HUUSFELDT
8	JESSICA MOOS

5. Find your sales representative in the list; type 1 in the 0 column; press Enter.
 - a. The **Sales Rep Lookup Window** closes and the **Sales Rep Maintenance** screen opens, displaying the data that exists in the system for the selected representative.

2/04/25 12:48:52 Sales Rep Maintenance Sys: DEMO V12
Cmp: RM Loc: DMO
Mode **CHANGE**

Sales rep #: 66

Name: User profile:
Address 1: Alt rep#:
Address 2:
City: State:
Zip code: Fax #:
Phone: Alt. phone:
E-mail:
Start date: Termination date:
Region:
Territory: Location:
Commission %:
Needs 1099: (Y/N)
Region V.P.: KAJ HUUSFELDT
District mgr: JEFF LOOMIS
Sales mgr: DOUG BERKELEY
Position:

6. Update the desired information and press Enter.
 - a. The updated information is saved in the system and the **Sales Rep Maintenance** screen displays.
 - b. Verify the updates by typing in the *Sales Rep #* field, pressing Enter, and reviewing the updated fields.

Reference Glossary

Field Definitions for Tasks

Sales Rep Maintenance Launch

- *Sales Representative Number* - The number of the sales representative you want to maintain. If you do not know the number, press F4 to search. **NOTE:** Add a new sales representative by pressing F6 on the keyboard or click on F06 Add in the **Display Functions** menu.

Sales Rep Maintenance Detail

- *Sales Representative Number* - Displays the number of the sales representative whose record you are maintaining.
- *Name* - Enter the first and last name of the sales representative.
- *User Profile* - Enter the name of the sales representative's user security profile for the system. If you do not know the name, press F4 to search for it.
- *Address 1* - Enter the street address where the sales representative is located.
- *Alternate Representative Number* - If applicable, enter the number for this sales representative from another system.
- *Address 2* - If applicable, enter the second line of the street address where the sales representative is located.
- *City* - Enter the city where the sales representative is located.
- *State* - Enter the two-letter abbreviation for the state where the sales representative is located.
- *Zip Code* - Enter the postal code where the sales representative is located.
- *Fax Number* - If applicable, enter a fax number where the sales representative can be reached.
- *Phone Number* - Enter the main phone number for the sales representative.
- *Alternate Phone Number* - If applicable, enter another phone number where the sales representative can be reached.
- *Email* - Enter the sales representative's email address.
- *Start Date* - Enter the date that the employee started as a sales representative.
- *Termination Date* - If applicable, enter the date that the sales representative left your employ.
- *Region* - Enter the code for the region out of which the sales representative works. If you do not know the code, press F4 to search for it.
- *Territory* - If applicable, enter the code for the territory that the sales representative covers. If you do not know the code, press F4 to search for it. If the sales representative is associated with more than one territory, press F13 (Shift + F1) to enter that information.

- The following screen displays:

2/04/25 12:01:53 Sales Rep Maintenance

Sales rep #:
1=Search

Opt	Loc	Terr#	Description	Area
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>

- Sales Representative Number** - Displays the number of the sales representative whose record you are maintaining.
- Location** - Enter the code for the location from which the sales representative works. If you do not know the code, enter 1 in the **Option** field to the left of this field to access the **Territory Lookup** window.

Territory Look-up

Opt: 1=Select

DMO

Opt	Loc	Terr	Description
<input type="checkbox"/>	DMO	001	BEST AREA EVER
<input type="checkbox"/>	DMO	002	DESC
<input type="checkbox"/>	DMO	003	CALIFORNIA SOUTH
<input type="checkbox"/>	DMO	004	DESC
<input type="checkbox"/>	DMO	005	
<input type="checkbox"/>	DMO	100	SOUTHWEST REGION
<input type="checkbox"/>	DMO	101	
<input type="checkbox"/>	DMO	123	TEST
<input type="checkbox"/>	DMO	190	

- Territory Number** - Enter the number for the territory in which the sales representative works. This number must correspond with the location code entered in the previous field. Territories are set up in Territory Maintenance.
- Description** - Displays the description for the location/territory combination.
- Area** - Enter or accept the area in the territory in which the sales representative works
- Location** - If applicable, enter the branch location the sales representative works out of.
- Commission Percentage** - Enter the percentage of commission typically paid to the sales representative. Press F8 to enter a more detailed commission schedule for the sales representative.

2/04/25 12:09:09		Sales Rep Maintenance		Sys: DEMO V12	
Sales rep #:				Cmp: RM Loc: DM0	
				Mode: ADD	
				Cur: USD	
	Base %	Base amt	Bonus %	2nd level	Bonus %
Major rentals:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Minor rentals:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sales:	<input type="text"/>	<input type="text"/>	<input type="text"/>		
New equip major sales:	<input type="text"/>	<input type="text"/>	<input type="text"/>		
New equip minor sales:	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Used equip major sales:	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Used equip minor sales:	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Delivery/Pick-up:	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Damage waiver:	<input type="text"/>	<input type="text"/>	<input type="text"/>		

- **Sales Representative Number** - Displays the number and name of the sales representative for whom you are setting up commission percentages.
- **Currency** - Enter or accept the code for the currency on which the commission percentages are based.
- **Major Rentals** - Enter the percentage of commission that the sales representative should earn on major **NOTE:** A major rental is for equipment that is in a category/class with its major category flag set to Y.
- **Minor Rentals** - Enter the percentage of commission that the sales representative should earn on minor rentals when the discount percentage off the rental book rates that is entered in the corresponding space above this field is not exceeded. **NOTE:** A minor rental is for equipment that is in a category/class with its major category flag set to N or blank.
- **New Equipment Major Sales** - Enter the percentage of commission that the sales representative should earn on the sale of new equipment that is in a category/class flagged as major.
- **New Equipment Minor Sales** - Enter the percentage of commission that the sales representative should earn on the sale of new equipment that is in a category/class that is NOT flagged as major.
- **Used Equipment Major Sales** - Enter the percentage of commission that the sales representative should earn on the sale of used equipment that is in a category/class flagged as major.
- **Used Equipment Minor Sales** - Enter the percentage of commission that the sales representative should earn on the sale of new equipment that is in a category/class that is NOT flagged as major.
- **Delivery/Pickup** - If applicable, enter the percentage of commission that the sales representative should earn on delivery and pickup charges.
- **Damage Waiver** - If applicable, enter the percentage of commission that the sales representative should earn on damage waiver charges.
- **Parts/Merchandise** - If applicable, enter the percentage of commission that the sales representative should earn on the sale of parts or merchandise.
- **Needs 1099** - Indicate whether the sales representative is a contract employee that requires a 1099 at the end of the year.

- *Region Vice President* - Enter the number of the sales representative who is the regional vice president for the sales representative you are maintaining. If you do not know the number, press F4 to search for it. If the region vice president does not have a sales representative number, enter his/her name.
- *District Manager* - Enter the number of the sales representative who is the district manager for the sales representative you are maintaining. If you do not know the number, press F4 to search for it. If the district manager does not have a sales representative number, enter his/her name.
- *Sales Manager* - Enter the number of the sales representative who is the sales manager for the sales representative you are maintaining. If you do not know the number, press F4 to search for it. If the sales manager does not have a sales representative number, enter his/her name.
- *Position* - Enter a user-defined code that you can use to group sales representatives for reporting and query purposes.