How do I enter prior year's sales and commission history?

Summary

     a.) I would like to enter sales histories from previous years into dynaMACS.

     b.) A manufacturer has sent me history for prior years and wants me to enter them so I can compare with the current year figures.

     c.) I had a hardware/computer failure and have the summary totals for all of my manufacturers and their customers on printed reports or statements.

Requirements

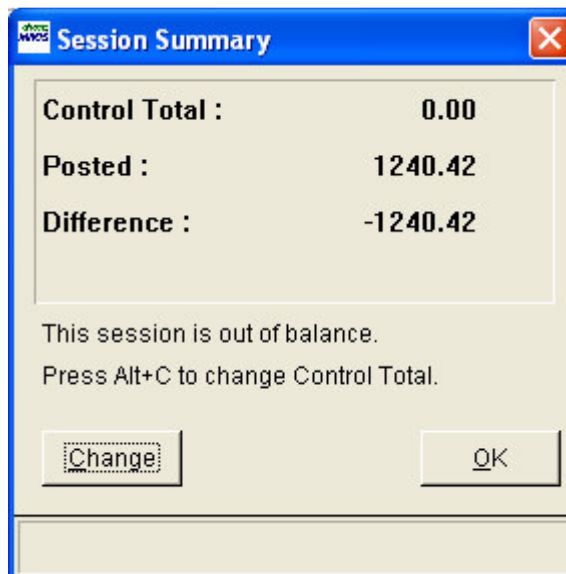   Familiar with Sales Entry

Module

     Sales Entry

Solution

These following steps outline how to enter the summary totals for past sales and commissions history through Sales Entry.

We recommend that you create a separate session per mfg per year. You may then enter monthly summary totals for each customer for this manufacturer or enter individual invoices for each customer for each month. Follow these steps:

1. Start the Sales Entry program from the Process menu or toolbar.
2. Start a new session. Enter the total sales for the year for this manufacturer in the Control Total field. Set the process month to December of the year you are entering (i.e. December, 2004, to enter 2004 history).
3. Select No when prompted to make the process month permanent. The Sales Entry screen appears.
4. Select Add from the toolbar.
5. Select the manufacturer for the entry. The manufacturers' name and default commission rate appears on the right.
6. Select the customer.
7. If you are entering just the customers summary totals you can leave the invoice number blank or type an indication of the month/year such as Jan03.
8. In the invoice date field, enter the first day of the month you are entering (i.e. 010103 for January 2003).
9. After entering the invoice date, post month is automatically set to the invoice month. If the post month doesn't change to match the invoice date, then your system is set to post to the process month. Override the post month manually or change the setting in the Customize toolbar.
10. Enter the sales amount. The commission amount is automatically calculated. Override the commission amount if incorrect.
11. Select Save to save the entry.

12. The screen clears and is waiting for the next customer.
13. Repeat these steps to enter 12 monthly totals for each customer for this mfg.
14. When finished, select Exit and then select End Session from the toolbar.
15. Select Yes at prompt to end the session.
16. The Session Summary window appears. This window shows the Control Total, total sales posted and the difference if you did not enter total sales for the year as the control total.

17. If there is a difference and you are finished with the session, select Change button to change the initial Control Total.
18. An input field appears on the screen with the value equal to the posted sales amount.
19. Select OK to change the Control Total to the new value and balance the session.
20. Print a session listing for future reference.
21. Post the sessions after they have been checked and verified. This will update the sales and commission history.
22. Repeat these steps for each mfg that you are entering history for.