

# Sales Imports

Import Transactions



# Preparation:

1. Locate a sales report from your manufacturer and save to a location that you can find. Adopt a consistent file naming convention such as MfgName (space) YYYY.MM with the date MM as the invoice month for your import
2. If it is in .pdf format, convert to Excel
3. If it is in an older Excel format (prior to 2003) convert to latest version
4. Move the information that you want to import to the first tab (the one on the left) if it is not already set up that way
5. Make sure that it is a “flat” file
  1. There is a unique header in row 1 for each column (no blank headers, no commas in headers)
  2. Data starts at row 2
  3. Remove Subtotals, blank rows, and totals
  4. Check for the presence of the required fields (Customer name, sales amount, commission rate if reconciling later)
  5. If there is an Invoice date, make sure you know if it is in “Text” format or “Excel” format. Make sure that it is in every row and the same format in every row.
  6. Make sure that the data that you need is within the first 50 columns (through AX)

# Customizing the “Shortcut Menu”

Edit shortcut menu here



The screenshot shows the top navigation bar of the RepSalesForce dashboard with various menu items like 'Companies', 'Contacts', 'Activity Journals', 'Tasks', 'Orders', and 'Jobs'. A blue box highlights the 'Shortcut menu bar' area. Below the navigation bar, the 'RepSalesForce' logo and name are visible. On the right, there are 'Help' and 'Create' dropdown menus. The 'Edit Shortcut Menus' dialog box is open, showing a list of available menus on the left and a 'Selected Menus' list on the right. A green box highlights the 'Selected Menus' header, and a red circle highlights the 'Save' button (a green document icon) at the top right of the dialog box. A 'Dashboard Settings' button is also visible on the right side of the dialog box.

Edit Shortcut Menus



Dashboard Settings

Menus

Customer Summary  
Product Sales History  
Sales Comparison  
Credit Sales Summary  
Manufacturer/Principal Page  
Line Overview  
Plan Vs Actual  
Sales Analytical Summary  
Manufacturer/Principal Summary  
Funnel Report

Selected Menus

Companies  
Contacts  
Purchase Orders  
Commissionable Transactions  
Import Transactions  
Sales by Month  
Product Details  
Products Master  
Activity Journals  
Quotes

To edit your shortcut menu:

- Click the edit button on the shortcut menu
- In the edit pop up box, choose the options you want from the left (Menus) and move them to the right (Selected Menus)
- save by clicking green save button (above Selected Menus)
- If you are doing this module, I recommend the selections circled in green.

# Import Process:

Get to the [Import Transactions](#) page by clicking on “Import Transactions” in your shortcut menu or by following the menu path of clicking on main menu, hover on Data Management, click on Import Transactions.

The screenshot displays the Salesforce user interface. At the top, a blue navigation bar contains several menu items: Companies, Contacts, Activity Journals, Opportunities, Line Overview, Purchase Orders, Jobs, Quotes, Samples, Messages, Sales by Month, Sales Comparison, Import Transac.., and Commissionable.. The 'Import Transac..' item is circled in green. On the left side, a sidebar menu is open, with 'Data Management' highlighted in yellow. A sub-menu is visible under 'Data Management', with 'Import Transactions' also highlighted in yellow. The main content area shows a list of tasks, including 'Opportunity Action Required(Call 3 - Fear)', 'Opportunity Action Required(Call 4 - Industry News)', and 'Hajoca'. On the right side, there are two panels: 'Events' showing 'No Events' and 'My Activity Journal' showing 'No Follow Ups'.

# Transactions Import page

Start here. Click "New"

The screenshot shows the 'Transactions Import' page. At the top, there is a navigation bar with the following items: Companies, Contacts, Activity Journals, Opportunities, Line Overview, Purchase Orders, Jobs, Quotes, Samples, Messages, Sales by Month, Sales Comparison, Import Transac..., Commissionable..., and Planner. On the right side of the navigation bar, there are icons for Help, Create, and a user profile labeled 'CFU'. Below the navigation bar, the page title is 'Transactions Import'. On the left side, there is a sidebar menu with the following items: Import Process, Import Log, Load Data, Map & Import, Aliasing, Re-aliasing, Error List, Reprocess Split, and Import Company Aliases. The main content area is titled 'Import Log' and contains a 'New' button. Below the 'New' button is a table with the following columns: Batch #, Filename, Mfg./Product Line, Type, Map Title, Processed on, User, Status, Processed, and Failed. The table contains three rows of data. The first row has a Batch # of 242, a filename of 'Customer number instead of customer name.xlsx', Mfg./Product Line of 'JSM Manufacturing', Type of 'Sales & Commission', Map Title of 'no customer name given', Processed on '12-01-2022 02:37 PM', User of 'Chris Farley USER', Status of 'Processed', Processed count of 26, and Failed count of 0. The second row has a Batch # of 241, a filename of '2020 301A spreadsheet.xlsx', Mfg./Product Line of 'JSM Manufacturing', Type of 'Sales & Commission', Map Title of 'jm', Processed on '11-22-2022 01:38 PM', User of 'Chris Farley USER', Status of 'Processed', Processed count of 10, and Failed count of 0. The third row has a Batch # of 240, a filename of '2020 301A spreadsheet.xlsx', Mfg./Product Line of 'JSM Manufacturing', Type of 'Sales & Commission', Map Title of 'jm', Processed on '11-10-2022 12:18 PM', User of 'Chris Farley USER', Status of 'Processed', Processed count of 10, and Failed count of 0. Each row has a trash icon and a chat icon in the final column.

Batch #	Filename	Mfg./Product Line	Type	Map Title	Processed on	User	Status	Processed	Failed
242	Customer number instead of customer name.xlsx	JSM Manufacturing	Sales & Commission	no customer name given	12-01-2022 02:37 PM	Chris Farley USER	Processed	26	0
241	2020 301A spreadsheet.xlsx	JSM Manufacturing	Sales & Commission	jm	11-22-2022 01:38 PM	Chris Farley USER	Processed	10	0
240	2020 301A spreadsheet.xlsx	JSM Manufacturing	Sales & Commission	jm	11-10-2022 12:18 PM	Chris Farley USER	Processed	10	0

Transactions Import

Import Process

Import Log

Load Data

Map & Import

Aliasing

Re-Aliasing

Error List

Reprocess Split

Import Company Aliases

Select File and Load Data

Mfg./Product Line [Not selected]

Import Type  Sales  Commission  Sales and Commission  Bookings

Import From File

Data import starts from line # 2

Select a file (.xls, .xlsx or .csv) and click on Load Data:

Import From Budde

Notes

Company Lookup

(1 of 1) 1 10

Name	Type	Sales Team	Phone	Region	Street	City	State	Postal Code
j								
DJ Bath Plus Gen Info	Mfg./Product Line							
JSM Manufacturing	Mfg./Product Line					Woodinville	WA	98072

1. Choose your Manufacturer/Principal by clicking on the magnifier. This brings up Company Lookup. Just typing in a couple of letters will shorten the list to choose from. When you see the one you want, click it.
2. Choose the type of import that you are doing. In this case we are doing a Sales import
3. Click on the blue "Choose File" button. This takes you to your computer to find the file that you are planning to import. When you find it, double click.

Transactions Import

Import Process

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Import Company Aliases

Select File and Load Data

Manufacturer/Principal JSM Manufacturing MAN

Import Type  Sales  Commission  Sales and Commission  Bookings

Map & Import

## Select File and Load Data

Manufacturer/Principal

JSM Manufacturing MAN



Import Type



Sales



Commission



Sales and Commission



Bookings

+ Choose File

Load Data

Cancel

Sales Import Example.xlsx 15.0 KB



Map & Import

4. Click Green "Load Data" button
5. When it finishes loading, it will show you how many lines it loaded (including the header) and a Sample File Content
6. When you check the Sample File Content and are satisfied that it is the correct file, click the blue "Map & Import" button

+ Choose File

Load Data

Cancel

### Load Process Status


Total processed: 7 Total loaded : 7

### Sample File Content

Invoice Date, Sold To Cust, ShipTo Cust, City, State, Zip, Inv # (Text date), Part Number, qty, Price, Sales amount,  
23-Jan-2023, Home Depot, Jason the Mason, Redmond , WA, 98052, 20230123, 19315124, 4, 165, 660,  
01-Feb-2023, Plumbing Supply, Pete's Plumbing, Issaquah, WA, 98027, 20230201, 19891811, 11, 250, 2750,  
17-Jan-2023, Plumbing Supply, Handy Andy, Puyallup, WA, 98371, 20230117, 201192025, 9, 165, 1485,  
25-Jan-2023, Plumbing Supply, Beautiful Bathrooms, Bothell, WA, 98105, 20230125, 11220518, 3, 250, 750,  
24-Jan-2023, Home Depot, Joe Homeowner, Kirkland, WA, 98034, 20230124, 21221182, 1, 165, 165,

Map & Import

7. To name your map, click the blue “plus” sign

Map Title: [--Select--]  Save Delete Test Mapping

Mapping for Manufacturer/Principal - JSM Manufacturing MAN

Manufacturer/Principal	No Data	POS/Direct Sales	No Data
Reference Row ID	No Data	POS Distributor	No Data
Customer *	No Data	Mfg Ship-to Num	No Data
City	No Data	State	No Data
Zip Code	No Data	Region	No Data
Secondary Customer	No Data	Secondary Customer City	No Data
Secondary Customer State	No Data	Secondary Customer Zip Code	No Data
Invoice Date *	No Data	Invoice Date *	
Date Format	DD-Mon-YYYY	Invoice Number	No Data
Sales Order	No Data	PO Number	No Data
Part Number	No Data	Product Line	No Data
Product Family	No Data	Product Description	No Data
Customer Part Number	No Data	Weight	No Data
Quantity	No Data	Unit Price	No Data
Sales Amount *	No Data	Post Split Amount	No Data
Booking Cost	No Data	Real Cost	No Data
Commission Rate	No Data		
Comment	No Data		
Currency Conv. Rate	No Data	Currency Conv. Rate	1
Generate Invoice to Reconcile	<input type="checkbox"/>		

Import Sales Data

8. Name the map and click “Set Map Title”

9. Using the drop down boxes, choose the name of the column on your spreadsheet that contains the appropriate data

10. Minimum required fields are outlined

11. Date fields will be addressed in the next slide



11. (continued) Invoice Date can be imported if it is on your spreadsheet.

- You would use the dropdown box (see left side of yellow frame). If your date is an “Excel” format date, it will show up in the box on the right side of the yellow frame in this pattern – ***no matter how it looks on your spreadsheet -*** which matches exactly the pattern in the blue frame.
- If your date is in “text” format on your spreadsheet, you need to use the dropdown box in the blue frame to match the pattern exactly that is showing on the right side of the yellow frame.
- If you do not have an invoice date on your spreadsheet, you can choose a date from the date chooser which will pop up if you click on the box on the right side of the yellow frame, leaving the left side showing “No Data”.
- You must choose one of these options, as Invoice Date is a required field.

Invoice Date *	No Data	Invoice Date *	
Date Format	DD-Mon-YYYY	Invoice Number	No Data
Sales Order	No Data	PO Number	No Data
Part Number	No Data	Product Line	No Data
Product Family	No Data	Product Description	No Data
Customer Part Number	No Data	Weight	No Data
Quantity	No Data	Unit Price	No Data
Sales Amount *	No Data	Post Split Amount	No Data
Booking Cost	No Data	Real Cost	No Data
Commission Rate	No Data		
Comment	No Data		
Currency Conv. Rate	No Data	Currency Conv. Rate	1
Generate Invoice to Reconcile	<input type="checkbox"/>		

# Where are you doing with the Sales?

- If you are going to reconcile your sales when the commissions arrive, continue with Slide 11

- If you are not going to reconcile the sales with the commissions, but are importing sales only, or are keeping the sales on the Sales Table and the Commissions on the Commissions Table, proceed to Slide 13

In order to reconcile later, the system has to know how much commission to expect. When you check the box in the lower left labeled "Generate Invoice to Reconcile" the Commission Rate % field pops up. If you have one commission rate for the whole spreadsheet, you can enter it here (green box). If there are multiple commission rates noted in the spreadsheet, you can map the commission rate column in the blue circled box.

Sales Order	NO Data	PO Number	NO Data
Part Number	No Data	Product Line	No Data
Product Family	No Data	Product Description	No Data
Customer Part Number	No Data	Weight	No Data
Quantity	No Data	Unit Price	No Data
Sales Amount *	No Data	Post Split Amount	No Data
Booking Cost	No Data	Real Cost	No Data
Commission Rate	No Data		
Comment	No Data		
Currency Conv. Rate	No Data	Currency Conv. Rate	1
Generate Invoice to Reconcile	<input checked="" type="checkbox"/>	Commission Rate %	

Import Sales Data

Map Title: Training Map + ✎ Save Delete Test Mapping

Mapping for Manufacturer/Principal - JSM Manufacturing MAN

Manufacturer/Principal	Use Default Value	POS/Direct Sales	No Data
Reference Row ID	No Data	POS Distributor	No Data
Customer *	ShipTo Cust	Mfg Ship-to Num	No Data
City	City	State	State
Zip Code	Zip	Region	No Data
Secondary Customer	Sold To Cust	Secondary Customer City	No Data
Secondary Customer State	No Data	Secondary Customer Zip Code	No Data
Invoice Date *	Invoice Date	*Invoice Date format	23-Jan-2023
Date Format	DD-Mon-YYYY	Invoice Number	Invoice #
Sales Order	SO#	PO Number	PO #
Part Number	Part Number	Product Line	No Data
Product Family	No Data	Product Description	No Data
Customer Part Number	No Data	Weight	No Data
Quantity	qty	Unit Price	No Data
Sales Amount *	Sales amount	Post Split Amount	No Data
Booking Cost	No Data	Real Cost	No Data
Commission Rate	No Data		
Comment	No Data		
Currency Conv. Rate	No Data	Currency Conv. Rate	1
Generate Invoice to Reconcile	<input checked="" type="checkbox"/>	Commission Rate %	15

12. Test the map by clicking the blue button in the upper right corner. Confirm the test by clicking the green button that pops up.

13. In the Mapped Sample Record, the 1<sup>st</sup> column shows the name of the box in the Repfabric map, the 2<sup>nd</sup> column shows the name of the column in the spreadsheet, the 3<sup>rd</sup> column shows the first line of data from the spreadsheet, and the 4<sup>th</sup> column shows any errors that are detected. This date format error happened when the column was changed from the Excel date to the column containing a text date.

14. Close the box, fix any errors that you found, and move on to "Import Sales Data"

**Mapped Sample Record**

FIELD	MAPPED COLUMN	DATA	ERROR
Invoice Date	Invoice Date	23-Jan-2023	
Manufacturer/Principal			
Mfg Ship-to Num			
POS/Direct Sales			
Reference Row ID			
POS Distributor			
Customer	ShipTo Cust	Jason the Mason	
Secondary Customer	Sold To Cust	Home Depot	
Commission Rate	15		
Region			
Product Line			
Product Family			
Part Number	Part Number	19315124	
Customer Part Number			
Product Description			
Weight			
Invoice Number	Invoice #	20230123	
Booking Cost			
Real Cost			
Unit Price			
Quantity	qty	4.00	
Projected Revenue/Sales Amount	Sales amount	660.00	
PO Number	PO #	411435	
City	City	Redmond	
State	State	WA	
Zip Code	Zip	98052	
Sales Order	SO#	14914208	
Secondary Customer City			
Secondary Customer State			
Secondary Customer Zip Code			
Post Split Amount			
Currency Conv. Rate	Currency Conv. Rate	1.00	

OK

Mapping

Map Title: Training Map + ✎ Save Delete Test Mapping

Mapping for Manufacturer/Principal - JSM Manufacturing MAN

Manufacturer/Principal	Use Default Value	POS/Direct Sales	No Data
Reference Row ID	No Data	POS Distributor	No Data
Customer *	ShipTo Cust	Mfg Ship-to Num	No Data
City	City	State	State
Zip Code	Zip	Region	No Data
Secondary Customer	Sold To Cust	Secondary Customer City	No Data
Secondary Customer State	No Data	Secondary Customer Zip Code	No Data
Invoice Date *	Invoice Date	*Invoice Date format	23-Jan-2023
Date Format	DD-Mon-YYYY	Invoice Number	Invoice #
Sales Order	SO#	PO Number	PO #
Part Number	Part Number	Product Line	No Data
Product Family	No Data	Product Description	No Data
Customer Part Number	No Data	Weight	No Data
Quantity	qty	Unit Price	No Data
Sales Amount *	Sales amount	Post Split Amount	No Data
Booking Cost	No Data	Real Cost	No Data
Commission Rate	No Data		
Comment	No Data		
Currency Conv. Rate	No Data	Currency Conv. Rate	1
Generate Invoice to Reconcile	<input type="checkbox"/>	Commission Rate %	

12. Test the map by clicking the blue button in the upper right corner. Confirm the test by clicking the green button that pops up.

13. In the Mapped Sample Record, the 1<sup>st</sup> column shows the name of the box in the Repfabric map, the 2<sup>nd</sup> column shows the name of the column in the spreadsheet, the 3<sup>rd</sup> column shows the first line of data from the spreadsheet, and the 4<sup>th</sup> column shows any errors that are detected. This date format error happened when the column was changed from the Excel date to the column containing a text date.

14. Close the box, fix any errors that you found, and move on to "Import Sales Data"

### Mapped Sample Record

FIELD	MAPPED COLUMN	DATA	ERROR
Invoice Date	Invoice Date	23-Jan-2023	
Manufacturer/Principal			
Mfg Ship-to Num			
POS/Direct Sales			
Reference Row ID			
POS Distributor			
Customer	ShipTo Cust	Jason the Mason	
Secondary Customer	Sold To Cust	Home Depot	
Commission Rate			
Region			
Product Line			
Product Family			
Part Number	Part Number	19315124	
Customer Part Number			
Product Description			
Weight			
Invoice Number	Invoice #	20230123	
Booking Cost			
Real Cost			
Unit Price			
Quantity	qty	4.00	
Projected Revenue/Sales Amount	Sales amount	660.00	
PO Number	PO #	411435	
City	City	Redmond	
State	State	WA	
Zip Code	Zip	98052	
Sales Order	SO#	14914208	
Secondary Customer City			
Secondary Customer State			
Secondary Customer Zip Code			
Post Split Amount			
Currency Conv. Rate	Currency Conv. Rate	1.00	

OK

Mapping

Map Title: Training Map + ✎ Save Delete Test Mapping

Mapping for Manufacturer/Principal - JSM Manufacturing MAN

Manufacturer/Principal	Use Default Value	POS/Direct Sales	No Data
Reference Row ID	No Data	POS Distributor	No Data
Customer *	ShipTo Cust	Mfg Ship-to Num	No Data
City	City	State	State
Zip Code	Zip	Region	No Data
Secondary Customer	Sold To Cust	Secondary Customer City	No Data
Secondary Customer State	No Data	Secondary Customer Zip Code	No Data
Invoice Date *	Invoice Date	*Invoice Date format	23-Jan-2023
Date Format	DD-Mon-YYYY	Invoice Number	Invoice #
Sales Order	SO#	PO Number	PO #
Part Number	Part Number	Product Line	No Data
Product Family	No Data	Product Description	No Data
Customer Part Number	No Data	Weight	No Data
Quantity	qty	Unit Price	No Data
Sales Amount *	Sales amount	Post Split Amount	No Data
Booking Cost	No Data	Real Cost	No Data
Commission Rate	No Data		
Comment	No Data		
Currency Conv. Rate	No Data	Currency Conv. Rate	1
Generate Invoice to Reconcile	<input type="checkbox"/>		

**Import Data**

15. Click "Import Data"

Comment

No Data

Currency Conv. Rate

No Data

Currency Conv. Rate

1

Generate Invoice to Reconcile

Import Data

### Import Process Status

Records Imported: 6    Records Failed: 0  
Batch No. : 151    Imported On : 02-06-2023 07:32 PM

Aliasing

### Error List

#	Error List	Record
No failed records		

16. Check the Import Process Status. Make sure there are no failed records. Then click the next blue button "Aliasing"

# Aliasing: Teaching Replibric Your Customers

Transactions Import

- Import Process
- Import Log
- Load Data
- Map & Import
- Aliasing
- Re-Aliasing
- Error List
- Reprocess Split
- Import Company Aliases

Aliasing Process

Summary

	Cleared Amt.	Unresolved Amt.	Total Amt.
Sales:	0	7,310	7,310
Commission:	0	1,096.5	1,096.5

Note: There are still 11 batches to process

(1 of 1) 1 50

#	Manufacturer/Principal	Customer	City	State	Zip Code	Secondary Customer	Inv.No	PO.No	Part Number	Distributor	Sales Amt.
151	JSM Manufacturing MAN	Jason the Mason	Redmond	WA	98052	Home Depot	20230123	411435	19315124		660.00
151	JSM Manufacturing MAN	Pete's Plumbing	Issaquah	WA	98027	Plumbing Supply	20230201		19891811		2750.00
151	JSM Manufacturing MAN	Handy Andy	Puyallup	WA	98371	Plumbing Supply	20230117		201192025		1485.00

17. Aliasing is the process by which you teach Replibric all the ways that your Manufacturers spell your customers' names in their sales and/or commission reports. There's a lot of information in this Aliasing screen, so here's a bit about some of the parts.

- Red: Import process menu. It has been keeping track of each stage in the process. The aliasing stage can be accessed at any time by navigating to "Import Transactions" and clicking on "Aliasing" The only stage that cannot be accessed by itself is the "Map and Import" stage. The only way to get there is to import something.
- The aliasing stage always defaults to your most recent batch that has not been posted. The batch number for what is currently showing is circled orange. You can choose from any unaliased batch or view all batches by clicking the blue look up tool that has been circled light orange.
- Yellow frame is the summary box. It shows the total sales and commissions amounts for the batch that is being viewed. It also shows how much is aliased and how much more you have left.
- Light green frame shows how many pages of 50 record there are and which page you are on. There is the option to change that 50 to 100 if you want.
- Dark green frame is where the action takes place. We will focus on this in the next slide



#	Manufacturer/Principal	Customer	City	State	Zip Code	Secondary Customer	Inv.No	PO.No	Part Number	Distributor	Sales Amt.
151	JSM Manufacturing MAN	Jason the Mason	Redmond	WA	98052	Home Depot	20230123	411435	19315124		660.00
151	JSM Manufacturing MAN	Pete's Plumbing	Issaquah	WA	98027	Plumbing Supply	20230201		19891811		2750.00
151	JSM Manufacturing MAN	Handy Andy	Puyallup	WA	98371	Plumbing Supply	20230117		201192025		1485.00
151	JSM Manufacturing MAN	Beautiful Bathrooms	Bothell	WA	98105	Plumbing Supply	20230125		11220518		750.00
151	JSM Manufacturing MAN	Joe Homeowner	Kirkland	WA	98034	Home Depot	20230124		21221182		165.00
				WA	98072	Home Depot	20230115		13120525		1500.00

18. Begin by clicking on one of the names that are red. The "Alias Primary by Name" box comes up.
- The top part of the box shows what came in on the report that you imported. The city and the Postal Code are blue and clickable to help narrow a long list down. This only helps if your customers have city and zip in the company record in the city and zip boxes.
  - The middle part is what Repfabric found in your Companies record that are potential matches based on the first few characters (letters, spaces, numbers, punctuation) of the name imported as Customer Name. If one of these is a match, you can click it.
  - The last part is where you can create a customer if none exists in your Companies list. The "Create With Details" button allows you to edit what you have, add detail, see if Google can find more details for you.
  - Or you can click "Quick Create" and it will create a customer for you with just the details that were imported. You do need to assign a Sales Team or it will not process.

### Alias Primary by Name

For: Beautiful Bathrooms [Split](#)

City: [Bothell](#) State: WA Zip Code: [98105](#)

Comm.Amt: 112.50 Invoice No: 20230125 Part.No: 11220518

Alias by Part Number:  Do not save Alias:

Name	Type	Sales Team	Phone	Region	City	State	Zip Code
Beaut							
Ferguson - Beautyware Supply DIST	Distributor	Team Tim Allen	303-286-2200		Henderson	CO	80640

### Create Customer

Company Name:

Company Type:

Sales Team:

Split commission on Part Number

Alias on primary and Secondary Customer combined

[Quick Create](#) [Create With Details](#)

Alias Primary by Name

For: **New Company**

Company Name \* Beautiful Bathrooms

Company Type \* Customer

Sales Team \* Select Sales Team

Private Team Select Private Team

Street

PO Box

City Bothell

State WA

Country

Zip Code 98105

Category Select Category

Visit Frequency

Get Details from **Google Places**

Split commission on Part Number

Alias on primary and Secondary Customer combined

Forecast Enabled

Phone 1

Phone 2

Fax

Website

Region Select Region

Call Pattern Select Call Pattern

Class Select Class

Parent Company

Save Cancel

- Here's the "Create with Details" box.
- You can click the "Google Places" button and it will look the company up for you. Keep an eye on the Company Name. Sometimes Google finds things that are not the same as what you are looking for. In that case, you would just hit Cancel and either Quick Create or Create with Details but without consulting Google.
- You will need to select a Sales Team, and if you need to change the Company Type, you should do that first. You can fill in any details that you have whether Google found them or not.
- When you have finished creating the customer, click "Save"

Aliasing Process [--Browse Alias--] Setup Auto Reconciliation

Show data for batch  Export

Summary	Cleared Amt.	Unresolved Amt.	Total Amt.
Sales:	7,310	0	7,310
Commission:	1,096.5	0	1,096.5

Note: There are still 11 batches to process

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#	Manufacturer/Principal	Customer	City	State	Zip Code	Secondary Customer	Inv.No	PO.No	Part Number	Distributor	Sales Amt.	
<input type="checkbox"/>	✓	151	JSM Manufacturing MAN	Jason the Mason	Redmond	WA	98052	Home Depot	20230123	411435	19315124	660.00
<input type="checkbox"/>	✓	151	JSM Manufacturing MAN	Pete's Plumbing	Issaquah	WA	98027	Plumbing Supply	20230201		19891811	2750.00
<input type="checkbox"/>	✓	151	JSM Manufacturing MAN	Handy Andy	Puyallup	WA	98371	Plumbing Supply	20230117		201192025	1485.00
<input type="checkbox"/>	✓	151	JSM Manufacturing MAN	Beautiful Bathrooms	Bothell	WA	98105	Plumbing Supply	20230125		11220518	750.00
<input type="checkbox"/>	✓	151	JSM Manufacturing MAN	Joe Homeowner	Kirkland	WA	98034	Home Depot	20230124		21221182	165.00
<input type="checkbox"/>	✓	151	JSM Manufacturing MAN	Sir Fix a Lot	Woodinville	WA	98072	Home Depot	20230115		13120525	1500.00

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19. When all the records have been aliased and you have green checkmarks, click "Post Cleared Data" to send it into the Sales Table (and the Commissionable Transactions if you clicked the box to generate invoice to reconcile) and to populate the reports. Hooray!

- If you have a large batches with a lot of aliasing done, it is good to Post Cleared Data when you need to get up and stretch or get another cup of coffee.