

# End-to-end order process

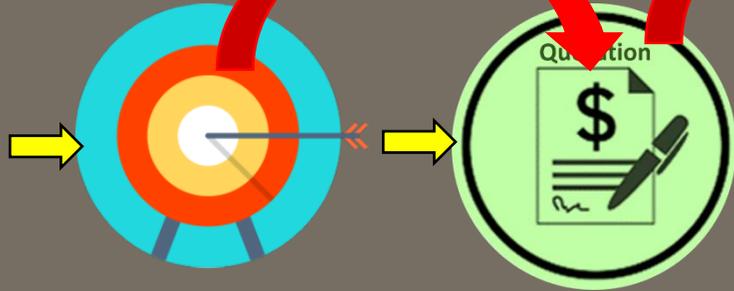
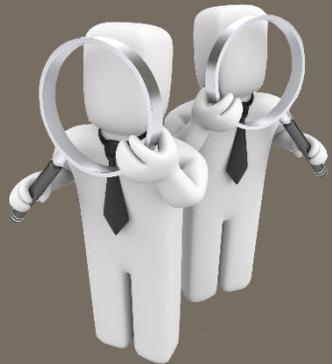
How an opportunity grows up to be a commission check.

You can start the process at any stage, and you can do different processes for different manufacturers if you need to. You may track some lines in more detail than others, and you may get different paperwork from different manufacturers (ex. orders, acknowledgements, POs, Quotes, Invoices, etc.) at different times.

# End to End Overview

The end goal is to enter commissions received and match them against a PO or Invoice (or opp) to make sure you are getting paid for all the business you are generating. The following slides will give a detailed view of the document trail that can be created in Repfabric. The process can change by Manufacturer if necessary.

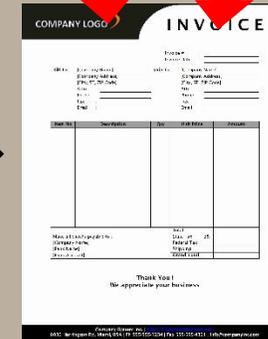
## CRM



- Activity Journal
- Opportunities
- Jobs / Projects
- Quotes
- Samples

- Web
- Mobile
- Outlook
- Web
- Mobile
- Outlook
- Web
- Mobile (inside the Opp)

## Sales and Commissions



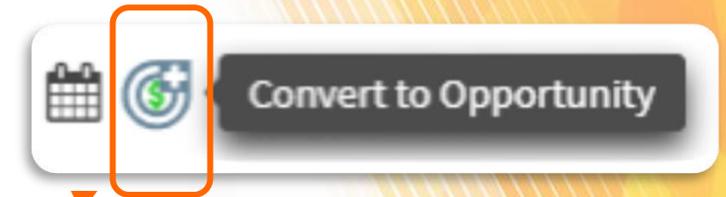
- PO Module
- Commissionable Transactions
- Check

- Web
- Mobile (inside the Opp)
- Web
- Mobile (inside the Opp)
- Web only

# Create an AJ – convert to Opportunity

You can start the process before you create an Opportunity. If you've created an Activity Journal to document communication with the customer, you can convert it to an Opportunity with one click.

The screenshot shows the CRM interface for creating an Activity Journal. The form includes fields for Date (05-16-2023), User (Gilda Radner - KK USER), Company (Todd Enterprises LLC), Topic (Sales Call Plan), and Type (Sales Call Plan). There are buttons for Save, Save and New, Cancel, Delete, and Send Email. A 'Convert to Opportunity' button is visible in the bottom right corner of the form area.



❖ You must "Save" the AJ for the "Convert to Opportunity" button to be available.

The screenshot shows the 'Link Opportunities' pop-up dialog. It asks 'Do you want to push the AJ comments to the reporting comments of the following opportunity?' and provides a table of opportunities to link to.

	Customer ↑↓	Manufacturer/Principal	Distributor ↑↓	Topic ↑↓	Stage ↑↓	Status ↑↓	Follow Up ↑↓	Next Step ↑↓	Status ↑↓
<input checked="" type="checkbox"/>									
<input checked="" type="checkbox"/>	Todd Enterprises LLC.	Grand Rapids Manufacturing		How an Opp grows up to be a commission check	Pending	Customer Info Required	05-09-2023		Open

❖ When you create an AJ, and Repfabric finds an open Opportunity for the same Manufacturer/customer combination, this pop-up message will ask if you'd like to "Push AJ comments into the 'Reporting Comments' of Opportunity?"

# Create an Opportunity

1. Enter info into the header page ("Basic" tab) of an opportunity and save it. Leave the "\$ Value" blank and "Est. Annual Qty" as "1". Add **at least one line item (see next page)**. Line-item details will populate the "Value" field. Pricing multiplied by quantity will equal (and populate automatically) in the "\$ Value" on the "Basic" page of the opportunity.

**Summary** | Save | Cancel | History

Customer: (Contact not added)

Manufacturer/Principal: (Contact not added)

Distributor: (Contact not added)

Stage: (Contact not added)

Status: (Contact not added)

Follow Up: 05-09-2023

\$ Value: 0.00

Topic: (Contact not added)

Next Step: (Contact not added)

Description: (Contact not added)

Opp Owner: (Contact not added)

**Basic** | Emails | Attachments | Line Items | Contacts | Comments

**Primary Information**

Customer \* | Todd Enterprises LLC. | Contact | [Not selected] | Clear

Manufacturer/Principal \* | Grand Rapids Manufaktur | Contact | [Not selected] | Clear

Distributor | [Not selected] | Contact | [Not selected] | Clear

**Opportunity Details**

Topic | How an Opp grows up to be a commission check

Next Step | [Red X]

Stage \* | Pending | Status \* | Customer Info Required

Sales Team | Team Gilda Radner | Watchers

Opp Owner | Admin |  Notify Watchers

Follow Up \* | 05-09-2023 | Priority | 5

Potential (%) | 0 | Est Annual Qty | 1

S Value | 0.00 | Prototype Date

Production Date | Competitor 1

Competitor 2 | Type | Select Type

Lead Source | Self-Generated

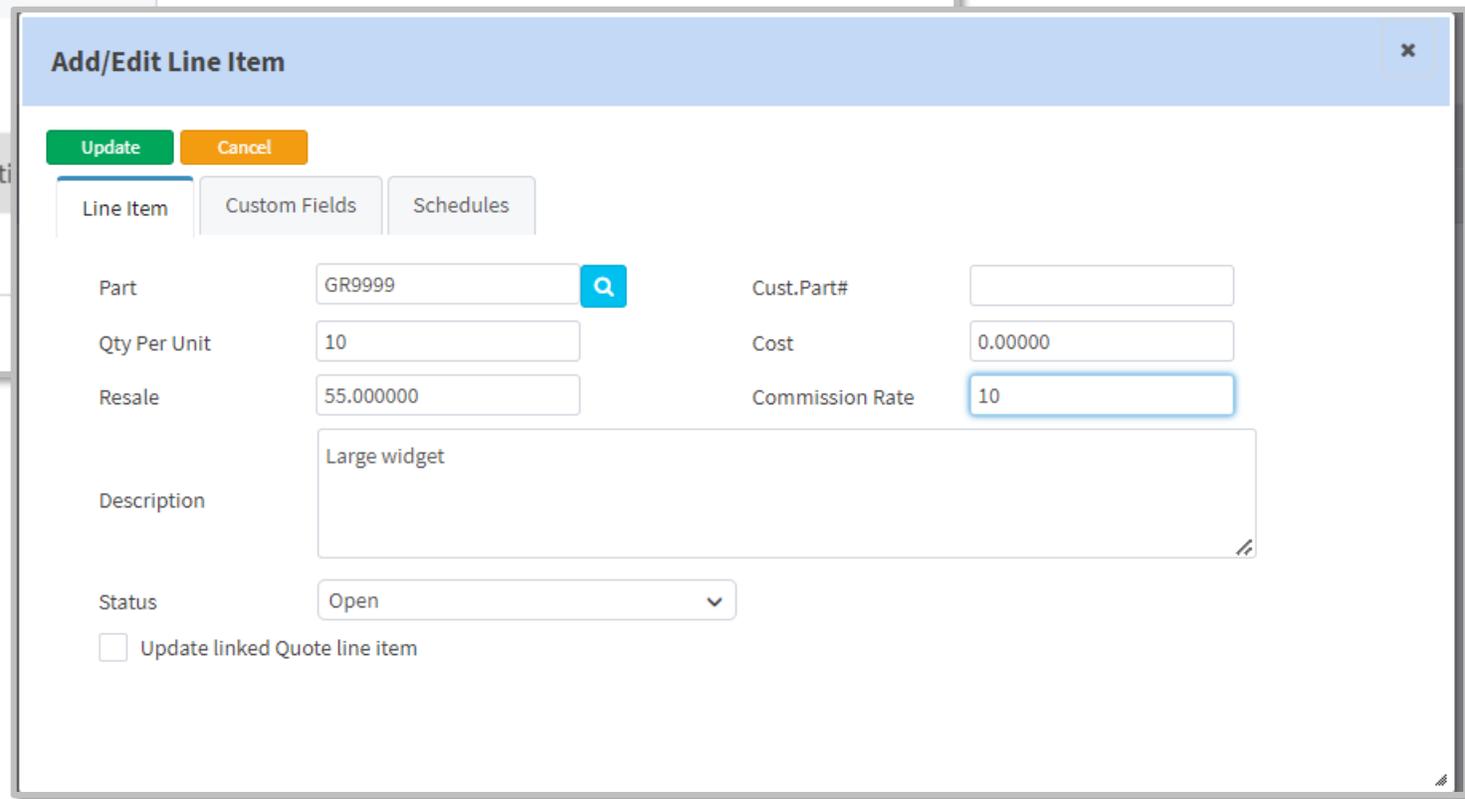
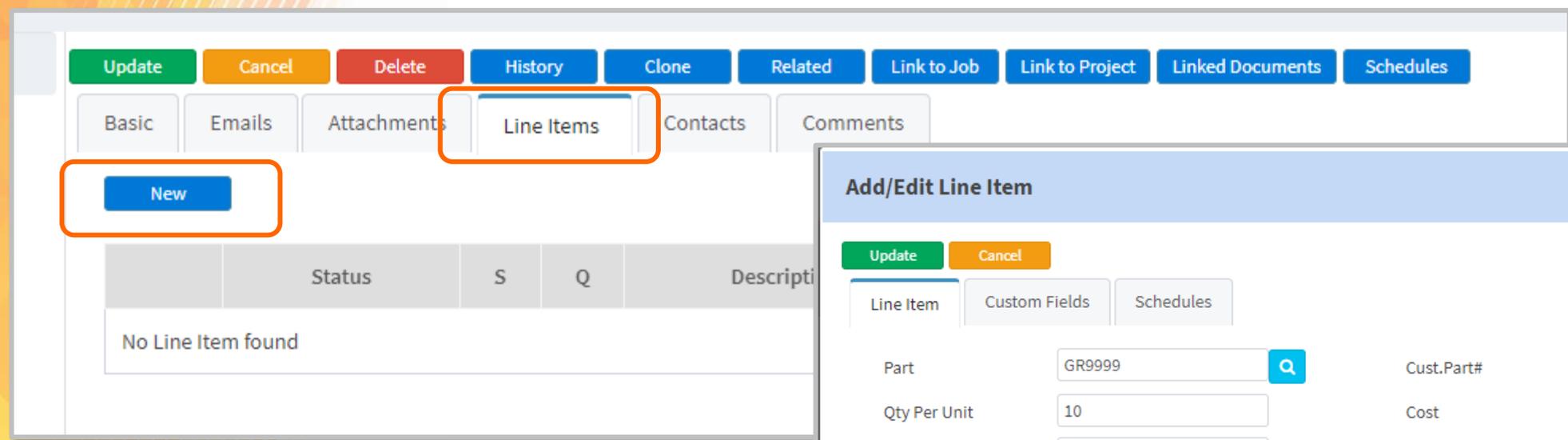
**Description**

Add Description here

4

## Add line items to Opportunity

2. Add one or more-line items. Enter as much detail as you know. You do NOT have to have a part number at this stage. "Commission Rate" is not set in stone until commission is received.



You can also link Repfabric to 'IS Quotes' and/or 'Oasis.'  
This will allow you to bring in Quotes (and/or Jobs) from other systems you may use.

# Create a Quote from Opportunity

Optional: You can create a Quote using one or more of the opp line items. You can use the quote number generated by the system or enter a quote number manually.

Update Cancel Delete History Clone Related Link to Job Link to Project Linked Documents Schedules

Basic Emails Attachments Line Items Contacts Comments

New

	Status	S	Q	Description	Part	Cust.Part#	Qty Per Unit	Resale
	Open	×	×	Large widget	GR9999		10	55.000000

Copy into: [--Select--]   
 [--Select--]   
 Samples   
 Quotes

### Quotes

Save Cancel

Quote Number: QT00004539 Recipient: Customer

RFQ No.: Customer Ref.No.:

Quote Date: 05-02-2023 Expiry Date: 06-02-2023

Status:  Open  Close Quote Status: Draft

Application: Owner: 1

Bid/Buy: Bid FollowUp:

Comments: Creating a quote from line items in an Opportunity

Less Options

# Editing line item- include Quote line item in update

- ✓ Once you have created a Quote, a green check mark will show in the line item.

Update Cancel Delete History Clone Related Link to Job Link to Project Linked Documents Schedules

Basic Emails Attachments Line Items Contacts Comments

New

Copy into: [--Select--]

	Status	S	Q	Description	Part	Cust.Part#	Qty Per Unit	Resale	Extended Amt
	Open	×	✓	Large widget	GR9				550
	Open	×	×	Small widget	GR7				300

### Add/Edit Line Item

Update Cancel

Line Item Custom Fields Schedules

Part GR9999

Qty Per Unit 10

Resale 55.000000

Description Large widget

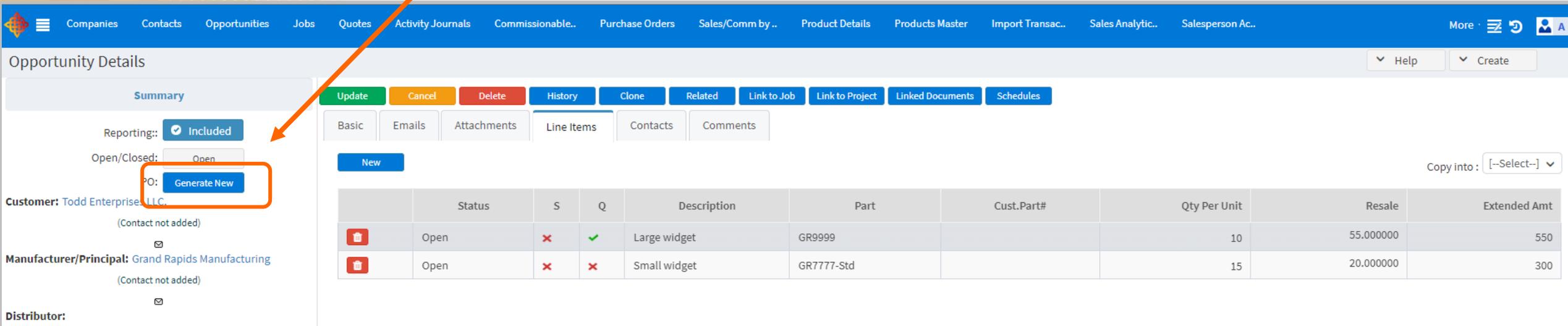
Status Open

Update linked Quote line item

*If you need to update the line item, **do it in the Opportunity** and check the box to "Update linked quote line item."*

## Create a PO from Opportunity line items

Optional: You can create a Purchase Order (a.k.a. order acknowledgement) using one or more-line items from the Opportunity.



Opportunity Details

Summary

Reporting::  Included

Open/Closed:

PO:

Customer: Todd Enterprises, LLC  
(Contact not added)

Manufacturer/Principal: Grand Rapids Manufacturing  
(Contact not added)

Distributor:

Update Cancel Delete History Clone Related Link to Job Link to Project Linked Documents Schedules

Basic Emails Attachments Line Items Contacts Comments

New

Copy into: [--Select--]

	Status	S	Q	Description	Part	Cust.Part#	Qty Per Unit	Resale	Extended Amt
<input type="button" value="Delete"/>	Open	×	✓	Large widget	GR9999		10	55.000000	550
<input type="button" value="Delete"/>	Open	×	×	Small widget	GR7777-Std		15	20.000000	300

## Create a PO continued..

“PO No.” and “PO Date” are required. Make sure to change the “Planned shipping date” if you know it. This may come in handy when running an export or “Backlog Report.” You can enter the “Comm Rate” here, but it is not official until the commission check is received.

### PO Generation ✕

Quote No.  Quote Date

**PO No. \***  **PO Date \***

SO No.  SO Date

Comm. Rate

(1 of 1)

<input checked="" type="checkbox"/>	Part <input type="text"/>	Resale <input type="text"/>	Qty Per Unit <input type="text"/>	Est Annual Qty <input type="text"/>	Total Qty <input type="text"/>	Planned Qty <input type="text"/>	Planned Shipping Date <input type="text"/>
<input checked="" type="checkbox"/>	GR9999	55.000000	10	1.00	10.0000	10.0000	05-02-2023

(1 of 1)

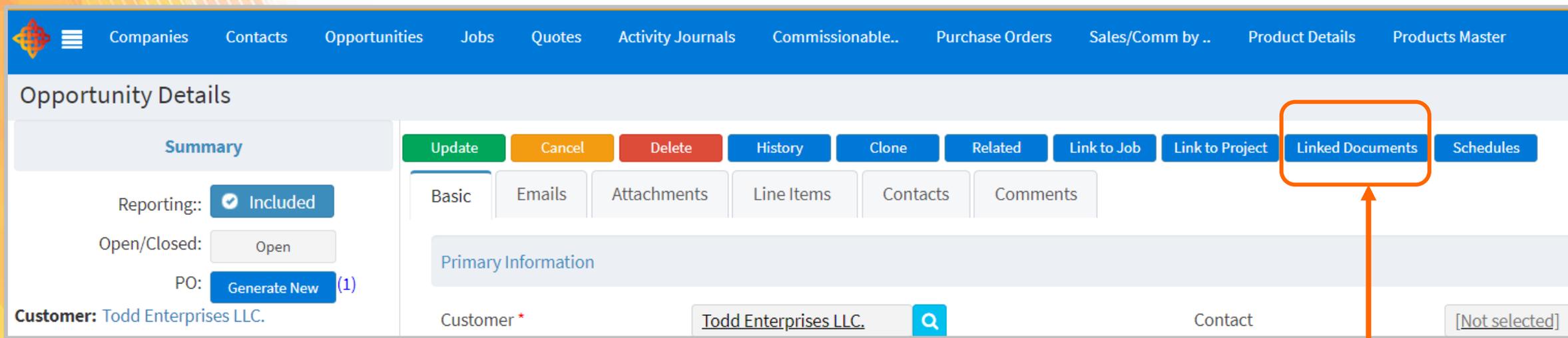
# Create a PO continued..

Once you have created a PO from the opp, a number will appear in brackets next to the "Generate New" button. This will let you know how many POs are linked to this opp.

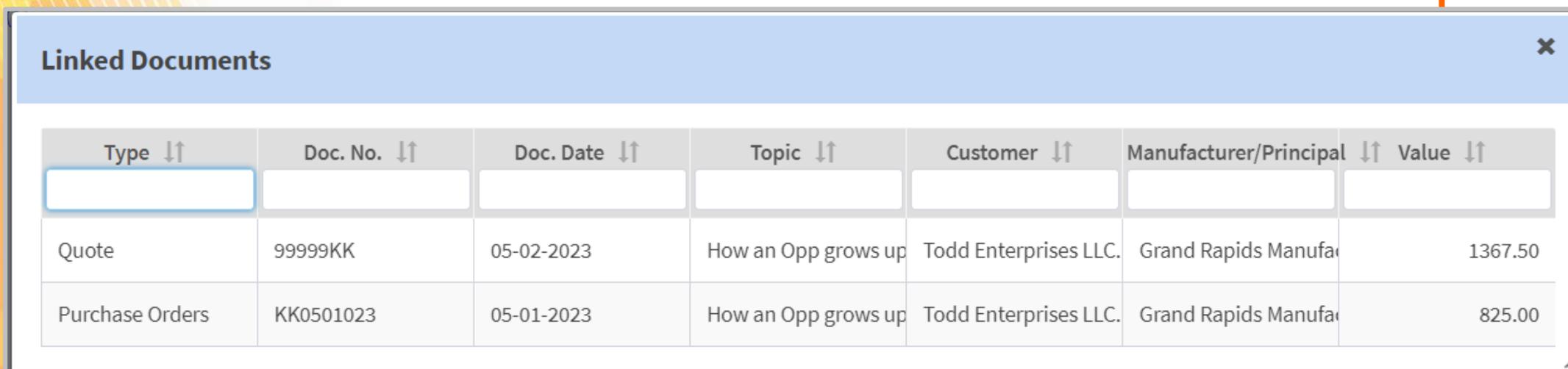
The screenshot displays the 'Opportunity Details' page. At the top, a blue navigation bar contains various menu items: Companies, Contacts, Opportunities, Jobs, Quotes, Activity Journals, Commissionable.., Purchase Orders, Sales/Comm by .., Product Details, and Products Master. Below this, the 'Opportunity Details' header is visible. A secondary navigation bar includes buttons for Update, Cancel, Delete, History, Clone, Related, Link to Job, Link to Project, Linked Documents, and Schedules. Underneath are tabs for Basic, Emails, Attachments, Line Items, Contacts, and Comments. The 'Summary' section on the left shows 'Reporting::' set to 'Included', 'Open/Closed:' set to 'Open', and 'PO:' with a 'Generate New' button that has '(1)' next to it. An orange arrow points to this button. Below the summary, the 'Customer' is listed as 'Todd Enterprises LLC.' with a note '(Contact not added)'. The 'Primary Information' section contains two rows: 'Customer \*' with 'Todd Enterprises LLC.' and 'Manufacturer/Principal \*' with 'Grand Rapids Manufacturin'. Both rows have search icons and '[Not selected]' dropdown menus.

## “Linked Documents” button

The “Linked Documents” button will show you all the items that are linked to each other. In the image below you can see the PO and the Quote created from this opp.



The screenshot shows the Opportunity Details page in a CRM system. The top navigation bar includes links for Companies, Contacts, Opportunities, Jobs, Quotes, Activity Journals, Commissionable.., Purchase Orders, Sales/Comm by .., Product Details, and Products Master. The main header is "Opportunity Details". Below this, there is a "Summary" section with fields for Reporting (Included), Open/Closed (Open), and PO (Generate New (1)). The customer is identified as "Todd Enterprises LLC.". A toolbar contains buttons for Update, Cancel, Delete, History, Clone, Related, Link to Job, Link to Project, **Linked Documents** (highlighted with an orange box), and Schedules. Below the toolbar are tabs for Basic, Emails, Attachments, Line Items, Contacts, and Comments. The "Primary Information" section shows the customer name "Todd Enterprises LLC." and a search icon.



The "Linked Documents" popup window displays a table with the following data:

Type ↑↓	Doc. No. ↑↓	Doc. Date ↑↓	Topic ↑↓	Customer ↑↓	Manufacturer/Principal ↑↓	Value ↑↓
Quote	99999KK	05-02-2023	How an Opp grows up	Todd Enterprises LLC.	Grand Rapids Manufac	1367.50
Purchase Orders	KK0501023	05-01-2023	How an Opp grows up	Todd Enterprises LLC.	Grand Rapids Manufac	825.00

## Important notes for updating line items:

- *When you update the Quote line item, it will NOT update the same line item in the Opp or PO.*
- *When you update a line item in the Opp, you can check the box to update Quote line items as well but it will not update the PO line items.*
- *When you update the PO line items, it will NOT update the same line item in the Opp or Quote.*
- *When you update the Opp line items, it will NOT update the same line item in the PO.*

# Closing an Opportunity

When there is no more follow-up required on an Opportunity, you can close it "Won," "Lost," or "Cancelled." In each case, you can add details "Closed Reason" and "Failed Reason" if lost/cancelled. *\*These options can also be created as a drop-down in "Subtables" menu.*

The screenshot shows the 'Opportunity Details' form. The 'Open/Closed' dropdown menu is highlighted with an orange box and a tooltip labeled 'Closing Status'. An orange arrow points from the left towards the dropdown. The form includes fields for 'Reporting' (Included), 'Customer' (Todd Enterprises LLC), and 'Manufacturer/Principal' (Grand Rapids Manufacturin). Buttons for 'Update', 'Cancel', 'Delete', 'History', and 'Clone' are visible at the top.

The 'Close Opportunity' dialog box shows the 'Status' field with 'Won' selected. The 'Date' field is set to '06-23-2023'. The 'Closed Reason' field is empty. The 'Commissionable Transaction' section shows 'Total Price' as '705.00' and 'Commission Rate' as '10.00'. A green box highlights a search icon in the 'Closed Reason' field, with a green arrow pointing to it from the text box below.

The 'Close Opportunity' dialog box shows the 'Status' field with 'Cancelled' selected. The 'Date' field is set to '06-23-2023'. The 'Closed Reason' and 'Failed Reason' fields are empty. A green box highlights a search icon in the 'Closed Reason' field, with a green arrow pointing to it from the text box below.

The 'Close Opportunity' dialog box shows the 'Status' field with 'Lost' selected. The 'Date' field is set to '06-23-2023'. The 'Closed Reason' and 'Failed Reason' fields are empty. A green box highlights a search icon in the 'Closed Reason' field, with a green arrow pointing to it from the text box below.

Create a "Subtable" to create a drop-down list that can be used when closing opportunities.

## Closing an Opportunity continued...

When you close an Opportunity “Won,” it creates a **copy** of the closed opp in “Commissionable Transactions.” This will be the linked document with **NO** document number. For most manufacturers' rep agencies, this opportunity in “Commissionable Transactions” **will not be used for anything**.

*\*Electronics rep agencies often use this transaction to check off the list when they have been paid. This will allow them to see what is still “open” in “Won” opportunities. They may not see any other documentation from their manufacturers (PO, shipping notice or invoice number).*

### Close Opportunity

Status  Won  Lost  Cancelled Date

Closed Reason

**Commissionable Transaction:**

Total Price  Commission Rate

### Linked Documents

Type ↑↓	Doc. No. ↑↓	Doc. Date ↑↓	Topic ↑↓	Customer ↑↓	Manufacturer/Principal ↑↓	Value ↑↓
Quote	99999KK	05-02-2023	How an Opp grows up	Todd Enterprises LLC.	Grand Rapids Manufa	1367.50
Comm. Trans.	051223-1	05-12-2023	How an Opp grows up	Todd Enterprises LLC.	Grand Rapids Manufa	705.00
Comm. Trans.		06-23-2023	How an Opp grows up	Todd Enterprises LLC.	Grand Rapids Manufa	705.00
Purchase Orders	KK0501023	05-01-2023	How an Opp grows up	Todd Enterprises LLC.	Grand Rapids Manufa	795.00

# PO Module

A. You can use the PO Module to keep track of all PO details (ship date, invoice #, invoice date):

- Recommended: Use the "Line Item" tab to "Ship" the line items and enter shipping details (Qty, date shipped, invoice number, invoice date. See next slide). This **will** create an "Invoice" in "Commissionable Transactions" that can be matched & reconciled against commissions imports (or "Bulk Reconcile" if you enter commission check info manually).
- **OR** Change "Basic" page "Status" from "Ordered" to "Acknowledged." Or "Partially Shipped" or "Fully Shipped" (*changing the status on the "Basic" tab of the PO will NOT create an "Invoice" in "Commissionable Transactions" to match and reconcile against sales & commissions import (or "Bulk Reconcile").*)

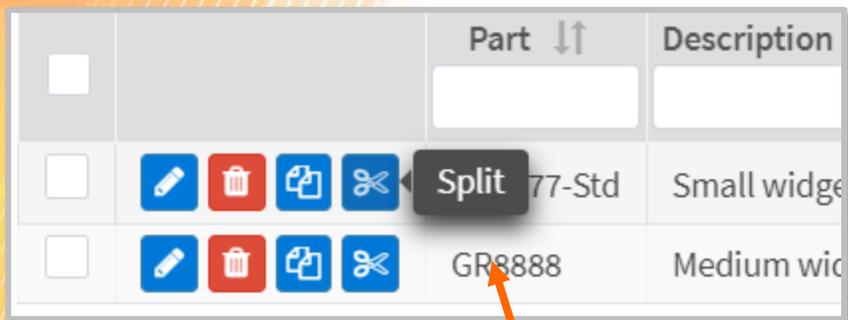
The screenshot displays the PO Module interface. On the left is a 'Timeline' section with stages: Ordered (selected), Acknowledged, Shipped, and Commission Paid. The main area is divided into 'Primary Information' and 'Transaction Details'. 'Primary Information' includes fields for Manufacturer/Principal (Grand Rapids Manufacturing), Customer (Todd Enterprises LLC), Distributor, Secondary Customer, Sales Team (Team Gilda Radner), and Secondary Customer Sales Team. 'Transaction Details' includes fields for Topic, Quote Number (99999KK), PO Number (KK0501023), SO Number, Total Amount (795.00), Commission Rate % (10.00), Projected Commission (79.500), Quote Date (05-01-2023), PO Date (05-01-2023), and SO Date. A 'Status' dropdown menu is open, showing options: Ordered, Partially Shipped, Fully Shipped, and Acknowledged. An orange arrow points from the 'Status' dropdown in the screenshot to a larger, detailed view of the dropdown menu on the right.

A detailed view of the Status dropdown menu, showing the following options: Ordered (selected), Ordered, Partially Shipped, Fully Shipped, and Acknowledged. An orange arrow points from the dropdown in the screenshot to this detailed view.

# Split Shipment of PO line items

As you receive information on products shipping, you can “Ship” the line items (you can ship line items individually or together).

1. If it is a partial shipment, use the “Split” button (scissors icon). To create one line item with quantity that is shipping and a second line item to show the remaining items to ship.



Purchase Order

Help Create

Edit Save and New Clear Cancel Delete Generate PDF Linked Documents

Summary

Basic Line Items Comments Attachments Opportunities Emails

Topic: How an Opp grows up to be a commission check  
Value: 795.00

Timeline

Ordered On: 05-01-2023 PO No.: KK0501023

Line Item Details

Add Ship Selected

	Part ↑↓	Description ↑↓	Odr.Qty. ↑↓	Pln.Qty. ↑↓	Shp.Qty. ↑↓	Pln.Date ↑↓	Shp.Date ↑↓	Shp.Status ↑↓	Acct.Date ↑↓	Standard P
<input checked="" type="checkbox"/>	GR7777-Std	Small widget	15.000	15.000	0.000	05-10-2023		Not Shipped	05-01-2023	
<input type="checkbox"/>	GR8888	Medium widget	15.000	15.000	0.000	05-10-2023		Not Shipped	05-01-2023	

# Split Shipment of PO line items

- 2. Enter the quantity that is shipping now, and it will create a second line items showing unshipped quantity.

### Split Line Item For Partial Shipment

Ordered Qty. 15.000  
Planned Qty. 15.000  
Qty. for Current Shipment \*

Line Item Details

		Part ↑↓	Description ↑↓	Odr.Qty. ↑↓	Pln.Qty. ↑↓	Shp.Qty. ↑↓	Pln.Date ↑↓	Shp.Date ↑↓	Shp.Status ↑↓	Acct.Date ↑↓	Standard P
<input type="checkbox"/>	   	GR7777-Std	Small widget	15.000	10.000	0.000	05-10-2023		Not Shipped	05-01-2023	
<input type="checkbox"/>	   	GR8888	Medium widget	15.000	15.000	0.000	05-10-2023		Not Shipped	05-01-2023	
<input type="checkbox"/>	   	GR7777-Std	Small widget	15.000	5.000	0.000	05-10-2023		Not Shipped	05-01-2023	

# Ship PO line items

*\*if you don't need to ship line items, skip to slide 20*

3. Check off the line items that are shipping. Click the "Ship Selected" button.
4. Enter the "Shipped Date," "Invoice Number," and "Invoice Date." Click "Post."

Line Item Details												Add	Ship Selected
		Part ↑↓	Description ↑↓	Odr.Qty. ↓↑	Pln.Qty. ↓↑	Shp.Qty. ↓↑	Pln.Date ↑↓	Shp.Date ↑↓	Shp.Status ↑↓	Acct.Date ↓↑	Standard P		
<input checked="" type="checkbox"/>					GR7777-Std	Small widget	15.000	10.000	0.000	05-10-2023	Not Shipped	05-01-2023	
<input checked="" type="checkbox"/>					GR8888	Medium widget	15.000	15.000	0.000	05-10-2023	Not Shipped	05-01-2023	
<input type="checkbox"/>					GR7777-Std	Small widget	15.000	5.000	0.000	05-10-2023	Not Shipped	05-01-2023	

If you want to be able to see this invoice on all "Sales" reports as soon as you "Post," check the "Sales" box.

If you want to be able to see the invoice on all "Commission" reports as well, as soon as you "Post," click the "Commissions" box. ***This is NOT recommended. It will show up on "Commissions" reports when you import "Commissions" or use "Bulk Reconcile" to record your commissions payments that match up with this transaction.***

### Ship Line Item

Shipped Date \*  

Invoice Number \*

Invoice Date \*  

Allow Partial/Over Shipment

Generate  Sales  Commission

# Shipping status and "Linked Documents" button

The line items will now show as "Shipped," and the "Linked Documents" button will show the invoice that was created in "Comm. Trans (Commissionable Transactions)."

Cancel Delete Generate PDF **Linked Documents**

Basic Line Items Comments Attachments Opportunities Emails

Line Item Details Add Ship Selected

	Part ↑↓	Description ↑↓	Odr.Qty. ↑↓	Pln.Qty. ↑↓	Shp.Qty. ↑↓	Pln.Date ↑↓	Shp.Date ↑↓	Shp.Status ↑↓	Acct.Date ↑↓	Standard P
<input type="checkbox"/>	GR7777-Std	Small widget	15.000	10.000	10.000	05-10-2023	05-12-2023	Shipped	05-01-2023	
<input type="checkbox"/>	GR8888	Medium widget	15.000	15.000	15.000	05-10-2023	05-12-2023	Shipped	05-01-2023	
<input type="checkbox"/>	GR7777-Std	Small widget	15.000	5.000	0.000	05-10-2023		Not Shipped	05-01-2023	

**Linked Documents** Link to Opportunity Quotes Job ×

Type ↑↓	Doc. No. ↑↓	Doc. Date ↑↓	Topic ↑↓	Customer ↑↓	Manufacturer/Principal ↑↓	Value ↑↓
Opportunity		05-09-2023	How an Opp grows up	Todd Enterprises LLC.	Grand Rapids Manufa	1292.50
Comm. Trans.	051223-1	05-12-2023	How an Opp grows up	Todd Enterprises LLC.	Grand Rapids Manufa	705.00
Quote	99999KK	05-02-2023	How an Opp grows up	Todd Enterprises LLC.	Grand Rapids Manufa	1367.50

- B. If you do NOT receive a notice of shipment and an invoice number, you can import sales & commissions from an Excel sheet.
1. "Data Management" > "Import Transaction" > "Load Data" > choose "Sales & Commissions."
  2. Use "Match & Ship" in PO screen to check off POs against the recently imported sales & commissions numbers. *See separate tutorial on "How to use 'Match & Ship' in PO Module."*

Transactions Import

Import Process

Select File and Load Data

Manufacturer/Principal: ABB ELDS

Import Type:  Sales  Commission  Sales and Commission  Bookings

Import From File: Data import starts from line #: 2

Buttons: + Choose File, Load Data, Cancel

Companies Contacts Opportunities Jobs

Purchase Orders

Buttons: New, Backlog Report, Match and Ship, Export

Match and Ship

Auto Match and Ship

Filters:  Show All  By Line Item  By Header Load Unshipped

PO No. ↑↓	PO Date ↑↓	Manufacturer/Principal ↓↑	Customer ↑↓	Part Number ↑↓	Pln.Date ↑↓	Pln.Qty ↑↓	Total
12345	10-20-2022	ABB ELDS	(Training) Short Circuit Technology Inc.	A	10-20-2022	100.000	
123	03-08-2023	Acme Explosives	Coyote Pyrotechnics CUST	A35444	03-08-2023	100.000	
123456	06-24-2022	Acme Explosives	Ace Is The Place HQ		06-24-2022	1.000	

There are 2 ways to get commission numbers into Repfabric so you can match them against “POs” in PO Module or against “Invoices” in Commissionable Transactions:

1. Import “Commissions” (or “Sales & Commissions”) in “Import Transactions” screen. You can set up the criteria Repfabric uses to “auto-match & reconcile” (see next slide) invoices you have in “Commissionable Transactions.” This can be set up separately for each manufacturer.
2. Use “Bulk Reconcile” in “Commissionable Transactions” to record a check and “match & reconcile” the paid invoices by hand.

❖ *You can do different options for different manufacturers if you need to.*



If you are going to "Import Commissions" and you have "Invoices" in "Commissionable Transactions," you can set up criteria to "Auto Reconcile" for each manufacturer.

Transactions Import

Import Process

Aliasing Process

Summary

	Cleared Amt.	Unresolved Amt.	Total Amt.
Sales:	0	44,000	44,000
Commission:	0	4,400	4,400

Buttons: Setup Auto Reconciliation, Post Cleared Data, Alias Multiple Customer, Assign Direct Commission, Add new products to the products master list

Commission Auto Reconciliation Settings

Manufacturer/Principal: Acme Explosives

- Manufacturer/Principal
- Customer
- Manufacturer/Principal Part Number
- Invoice Number
- Purchase Order Number
- Sales Amount

Note: Matching will be done only if a single record is found based on set criteria and will be reconciled as well if the commission amount matches.

Buttons: Save, Cancel

# Different Flow options starting w/Opportunity:

1. Generate PO from Opp
2. Import Sales & Comm
3. Use "Match & Ship"



**Import Sales  
&  
Commissions**



**Match & Ship  
(PO Module)**

1. Generate PO from Opp
2. Ship line items in PO Module  
(Creates "Invoice" in  
"Commissionable Transactions")
3. Use "Bulk Reconcile" in  
"Commissionable Transactions."



**Bulk  
Reconcile  
Commissions**

1. Generate PO from Opp
2. Ship line items in PO Module  
(Creates "Invoice" in  
"Commissionable Transactions")  
Import Sales & Comms and set  
up Auto Match & Reconcile.



**Import  
Commissions**

# Different Flow options starting w/Purchase Order:

1. Create PO in PO Module
2. Import Sales & Commissions
3. Use "Match & Ship" in PO Module

**PURCHASE ORDER**

FROM: [Company Name] TO: [Company Name]

Item	Qty	Unit Price	Total
Item 1	1	100.00	100.00
Item 2	2	10.00	20.00
<b>TOTAL:</b>			<b>\$120.00</b>



1. Create PO in PO Module
2. Ship line items in PO Module (Creates "Invoice" in "Commissionable Transactions")
3. Use "Bulk Reconcile" in "Commissionable Transactions"

**PURCHASE ORDER**

FROM: [Company Name] TO: [Company Name]

Item	Qty	Unit Price	Total
Item 1	1	100.00	100.00
Item 2	2	10.00	20.00
<b>TOTAL:</b>			<b>\$120.00</b>

**COMMISSION LOGO INVOICE**

TO: [Company Name]

DATE: [Date]

AMOUNT: [Amount]



1. Create PO in PO Module
2. Ship line items in PO Module (Creates "Invoice" in "Commissionable Transactions")
3. Import Sales & Commissions use Auto Match & Rec

**PURCHASE ORDER**

FROM: [Company Name] TO: [Company Name]

Item	Qty	Unit Price	Total
Item 1	1	100.00	100.00
Item 2	2	10.00	20.00
<b>TOTAL:</b>			<b>\$120.00</b>

**COMMISSION LOGO INVOICE**

TO: [Company Name]

DATE: [Date]

AMOUNT: [Amount]

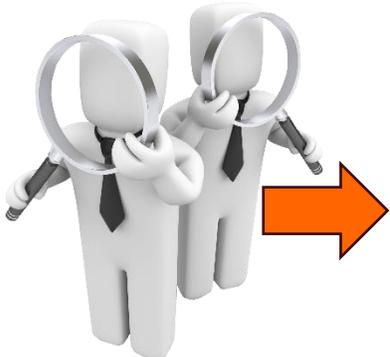


Choose the path your company will use for each manufacturer. *You may need to change the order of the icons to make your exact path.*

You can create a Quote from an opp, but it has no connection to sales or commission numbers.



**Quote**



**AJ**



**Opp**



**PO/SO**



**Invoice**



**Bulk Reconcile Commissions**

OR



**Import Commissions**

You can group opps together with a Job, but it has no connection to sales or commission numbers.



**Job**