SalesPerson Reporting

Many pest control companies hire and pay dedicated SalesPersons on a commission basis. PestaRoo makes it easy to track and report the sales for these workers, independently from the Technician ID. The report is based by any date range desired.

Overview

For purposes of reporting, PestaRoo allows you to distinguish between the Technician who does the application, the SalesPerson who closed the sale, and the Source of the customer. Each of these is potentially different.

The Technician, set at each work order, is the easiest to grasp. It is the staff person who actually applies products at the customer's location.

The Source, set at the Customer level, is typically how the customer heard about your service. Examples here include newspaper and radio ads, home and garden show displays, mailings, and door hangers.

The SalesPerson, also set at the Customer level is the person who closed the sale. SalesPerson tracking is typically only done when the sale is for an agreement, or some other long-term arrangement. SalesPerson tracking is normally only used by those companies that have one or more SalesPersons paid on a commission.

SalesPerson tracking and reporting is strictly based upon payments actually received and does not include any applicable sales tax. It is calculated at the individual payment line.

Staff Setup

From Staff Data Entry you can designate any staff person as a **SalesPerson** by clicking 'Yes' next to SalesPerson. Staff persons so marked will show up in the drop-down value lists for SalesPersons.

Assigning Customers

From the "Prefs" tab of Customer Data Entry, you can set the **SalesPerson ID** for that single customer. After setting it here, all WO's, Invoices, and Payments downstream from that customer will be allotted to the designated SalesPerson. Note that only WOs and Invoices created AFTER you set the **SalesPerson ID** will be associated. SalesPerson Reporting is based upon inheritance. So, all the payments downstream from any invoices created for that customer will belong to that SalesPerson. If the the **SalesPerson ID** is changed, the invoices and payment created for the previous SalesPerson are unchanged. Only invoices (and their payments) created after the SalesPerson change will belong to the new SalesPerson.

Editing and Re-assigning

You can change the SalesPerson at the invoice level. After finding the needed invoice, go to Invoice List. Then, scroll far to the right where you can change the **SalesPerson ID**. Any payments made after this change will be associated with that SalesPerson.

You can also edit the **SalesPerson ID** at the payment line level. To edit a Payment Line, you must have Manager's Access. From Manager's Access, click on 'View Payment Lines Layout'. On that screen you'll be able to find and view any individual payment lines. And, you will be able to change the **SalesPerson ID**

Any changes you make to the **SalesPerson ID** at the Customer, WO, or Invoice level are reflected in the permanent record in their respective Change Log.

Printing the Report

From Home Page, click 'Select Report to Print' and then the Date Range tab. Set the **Start Date** and **Stop Date** as desired. Then click 'Sales by SalesPerson'. The report will print each SalesPerson's data on a separate page. If you hold the Shift key while clicking the report button, your report will summarize all SalesPerson on a single page.