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User Guide

Counter Person Productivity

CPD

March 2005

Notes

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Introduction

The Counter Person Productivity (CPD) application generates a commission payout report, itemized by date, for all your Parts sales associates.

The report feature can be customized to show closed or open parts tickets, gross sales or net sales, and different groups of salespersons. The report displays commissions earned (if any) on parts sales for retail, wholesale, customer-paid repair orders, warranty repairs, and internal accounts.

The setup routines for the CPD application control where your related GL account data is processed in the report columns, and what commission rates are paid to individual salespersons.

Overview

This guide provides information for accessing, setting up, and using the features of the Counter Person Productivity application.

Navigation

- Make sure that the Caps Lock feature is on.
- After typing data into a field, press **Enter** to move to the next field.

Accessing CPD

Follow these steps to access CPD from the User Security Menu.

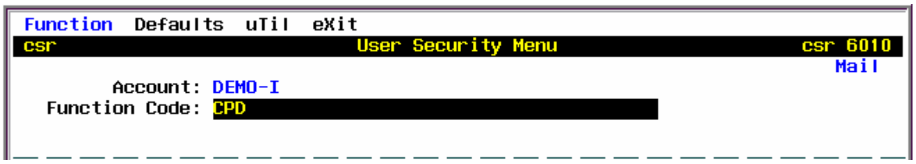

Figure 1. Application Account and CPD Function Code

1. Log on to your Parts Inventory (*name*-I) application account.
2. At the Function Code field, enter **CPD**.
3. At the CPD menu, choose the option for the task you want to perform.

CPD Menu

The main Counter Person Productivity menu provides a list of all functions used to maintain setups for, calculate, and generate the commission report.

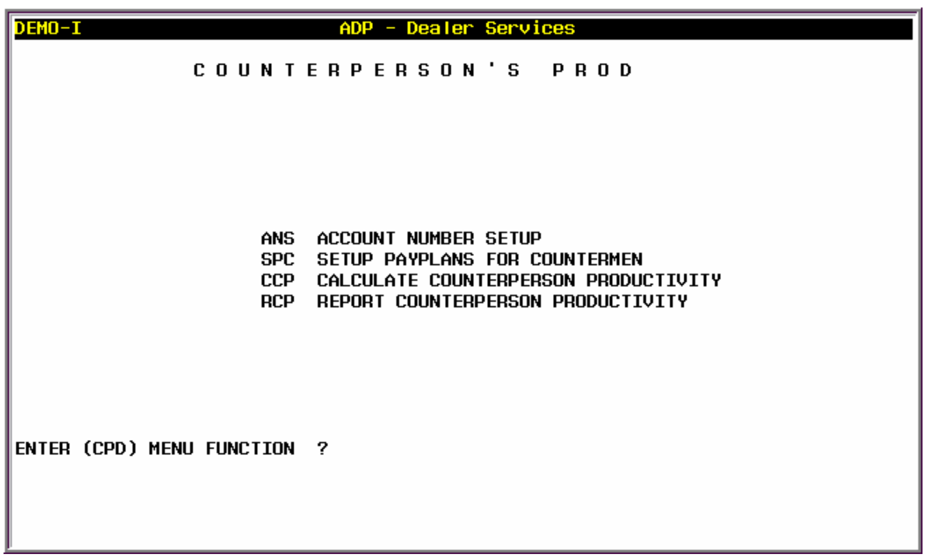

Figure 2. CPD Menu

CPD Setups

The two setup functions in the CPD application allow you to define which GL account numbers will be used for which portions of the commission report, and the percentage commissions awarded for each range of sales defined for your sales staff.

Use the instructions that follow to set up each component of the application, as required for your dealership's parts operations.

Setting Up Account Numbers

The Account Number Setup function lets you associate GL account numbers that may contain data related to parts sales to your commission report, in the appropriate sales and unit columns.

To select the account numbers from which the Counter Person Productivity report will draw data:

1. Log on to your *name*-I account and enter **CPD** at the Function Code field.
2. At the `CPD Menu Function` prompt, enter **ANS**.
3. Use the company selection list to choose the company you want to set up, and then press **Enter**.

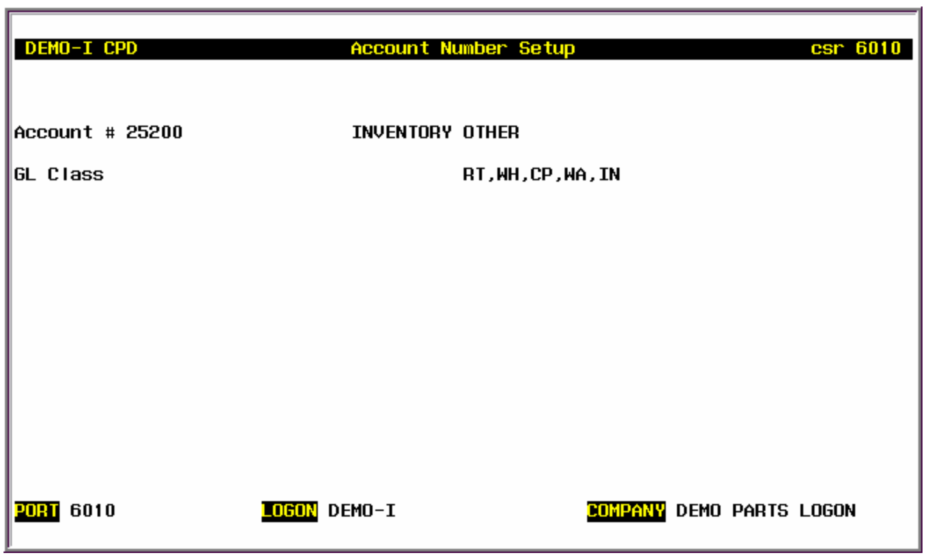

Figure 3. Account Number Setup Screen

4. At the Account # field, enter an exact account number you want to include on the report. (As you enter each valid account number, the program displays the account description.)
5. At the GL Class field, enter the two-letter code that corresponds to the commission report column where you want related parts sale data to appear.

   For example, to assign an account to the Customer Pay column, enter **CP** at the GL Class prompt.

6. Continue adding account numbers as needed. When you are done, press **Enter** at the GL Class and Account # fields without entering a value to exit the setup screen. The program returns you to the CPD menu.

Important! *Use care when entering accounts and class codes in this screen so that you add only the specific GL accounts you need for the report. To change an account setup later, enter the account number again and then enter a different GL Class code.*

Setting Up Counterperson Commission Ranges

The Pay Plans Setup screen lets you manage the list of persons at your dealership (whether in the Parts department or some other department) that should be included when the Counter Person Productivity application generates the commission report.

For each person in the setup screen, you can also define a range of commission rates based on the person's monthly sales volume. For convenience, this function allows you to copy an existing counterperson's settings when creating a new setup entry.

To set up Parts counterpersons (and other employees) to appear on the commission report:

1. Log on to your *name*-I account and enter **CPD** at the Function Code field.
2. At the `CPD Menu Function` prompt, enter **SPC**.
3. Use the company selection list to choose the company where you want to set up employees, and then press **Enter**.

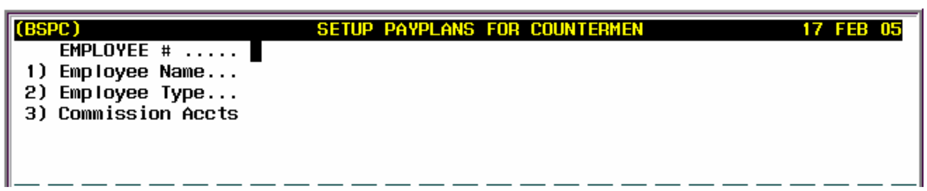

Figure 4. Pay Plans Setup Screen

4. Enter the employee number that you want to add to the commission report.

   If you enter a number that has not been set up before, the program prompts you to confirm that you want to add a new employee (or copy from an existing record).

   – To cancel the employee, enter **N** at the prompt.

   – To set up a new employee along with all the data for the record, enter **Y** at the prompt.

   – To create a new employee record from an existing setup, enter **C** at the prompt. At the `Counterman # to Copy From` prompt, enter the number for an employee setup from which you want to copy the existing settings.
5. At the Employee Name field, enter the employee's name, or press **Enter** to accept the existing value.
6. At the Employee Type field:

   – Enter **1** if the current employee is a counter person in the Parts department.

   – Enter **2** if the current employee is a salesperson in another department whose commission (if any) should be calculated by invoice.

– Enter **3** if the current employee is a salesperson in another department whose commission should be calculated at a customer level.

7. If you choose option 1 for the Employee Type, the program prompts you to enter an Outside Type as well. *This field is optional.* Enter a value only if the Parts department has an outside salesperson. Enter **2** to retrieve salesperson data by invoice or **3** to retrieve salesperson data at customer level.
8. At the Commission Accts field, enter the exact account number(s) from which commissions for this employee should be reported. To enter more than one account number, separate the numbers with spaces.

   Note. *Leave this field blank if commissions do not apply for this employee.*

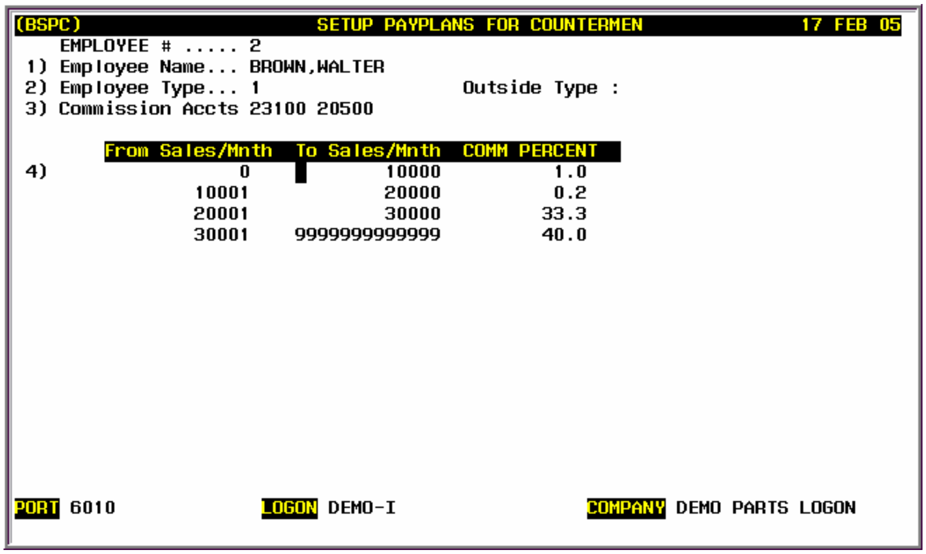

Figure 5. Pay Plans Setup Screen (example data)

9. After you enter any commission account numbers, the program displays the sales commission table.

   In the To Sales/Month column, enter the first range maximum for the commission calculation for this employee. Press **Enter** to move to the next column.
10. In the Comm Percent column, enter the commission percentage awarded for sales in the defined range at left.
11. Continue adding range maximums and commission percentages as required.

    The value in the From Sales/Month column is automatically calculated (one higher than the To column in the previous row).

    To define the last row in the table, set the To Sales/Month value to **99999999**.
12. At the `Accept / Delete / Exit or #` prompt, enter **A** to accept (save) the settings for the current employee, or enter **E** to exit without saving.

    To return to one of the numbered fields in the screen, enter **1**, **2**, **3**, or **4**.
13. At the Employee # field, enter another employee number to repeat the setup procedure at step 4, or press **Enter** to return to the CPD menu.

Generating the Parts Sales Commission Data and Report

Use the Calculate and Report routines on the CPD menu to generate the parts-sale commission data used in the productivity report, and to print the report itself.

Calculating the Commission Balances

To generate the data used in the Counter Person Productivity report:

1. Log on to your *name*-I account and enter **CPD** at the Function Code field.
2. At the `CPD Menu Function` prompt, enter **CCP**.
3. At the `Run This Function Now or Later` prompt:
   - Enter **N** to run the calculation immediately,

     -OR-
   - Enter **L** to run the calculation at a specified time. Enter a time value (in *HH:MM* format, including the colon) for the system to process the commission data.

   Important! *If you use the Later option, the screen remains locked in the CPD/CCP function until the selected time arrives and the calculation runs.* ***Use the Later option with caution.***
4. The program returns you to the CPD application menu. Press **Enter** to exit to the Function Code field.

Creating the Commission Report

To create the Counter Person Productivity report:

1. Log on to your *name*-I account and enter **CPD** at the Function Code field.
2. At the `CPD Menu Function` prompt, enter **RCP**.

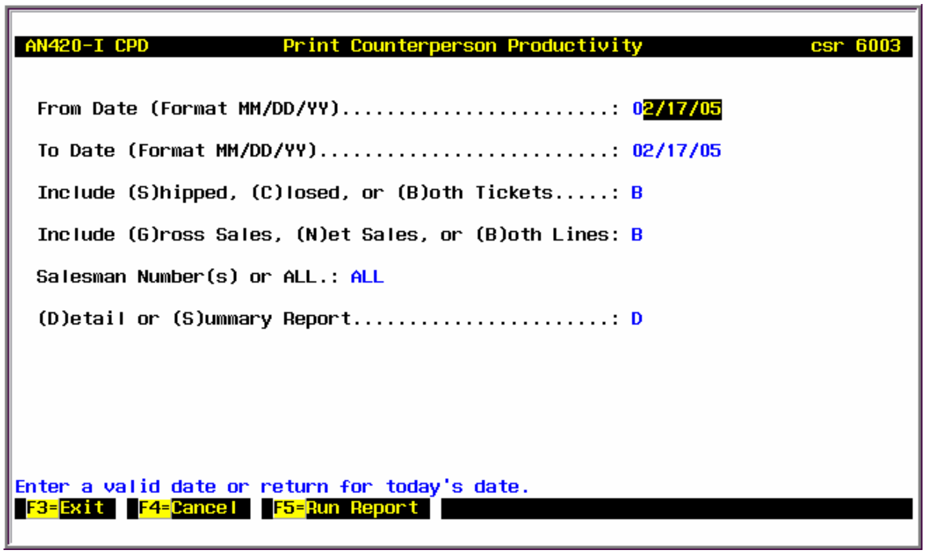

Figure 6. Counter Person Productivity Report Definition Screen

3. In the first two fields, enter the starting and ending dates for the report range.
4. Enter **S** to display only sales of shipped parts on the report, **C** to display only parts sales on closed orders, or **B** to display both types of tickets.
5. Enter **G** to display parts sales with gross profit figures, **N** to display net sales figures, or **B** to display both gross and net sales figures (in separate lines) on the report.
6. At the Salesman Number prompt, enter one or more salesman numbers for the counter persons you want to list on the report, separating each number with spaces.

   -OR-

   Enter **ALL** to display all the salespersons (that have been set up in the SPC routine) on the report.
7. Enter **D** to use the detail format, or **S** to use the summary format.
8. Press **F5=Run Report**.
9. At the Print Destination dialog box, choose Terminal to send the report to the screen, or choose one of the printer output options.
10. Use the company selection list to choose a company for the report, and then press **Enter**.

REPORT: BRCP — RUN DATE: 03 MAR 2005
PAGE: 10 — PARTS DEPARTMENT — RUN TIME: 04:42:46PM
COMPANY NUMBER: 420
C O U N T E R M A N   P R O D U C T I V I T Y   R E P O R T

		---- RETAIL ----		-- WHOLESALE ---		- CUSTOMER RO --		- WARRANTY RO --		- INTERNAL RO --		---- TOTALS ----	
SLSMN	DATE	SALES	CNT	SALES	CNT	SALES	CNT	SALES	CNT	SALES	CNT	SALES	CNT
4580	01/14/05	14	1	184	1	32	9					230	11
Net		10	1	17	1	3	9					29	11
4580	01/17/05	59	7	399	12					23	1	482	20
Net		37	7	5	12					2	1	44	20
4580	01/18/05			6,010	10							6,010	10
Net				256	10							256	10
4580	01/19/05					35	2					35	2
Net						15	2					15	2
4580	01/20/05			429	14							429	14
Net				18	14							18	14
4580	01/21/05							42	1			42	1
Net								12	1			12	1
4580													

Figure 7. Counter Person Productivity Report (example data)

Each of the five central column headings on the report indicates the daily sum of parts sales (SALES), and the number of parts (CNT), for each salesperson selected for the report.

11. (Screen output only) Press **Enter** to see each screen of the report until you return to the CPD menu.