



Sales Analysis Run Instructions

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Table of Contents

About this document

Chapter 1 Introduction to Infor LX.....	11
Overview of Infor LX.....	11
Navigation.....	11
Menus.....	11
Dates.....	11
Attention key and quick access icon.....	12
Look-up features.....	12
Remembered keys.....	12
Standard online help features.....	12
Generic help text for line actions.....	13
Line actions.....	13
Generic help text for screen actions.....	14
Enter.....	14
Enter.....	14
Enter.....	14
F1=Help.....	15
F3=Exit.....	15
F4=Prompt.....	15
F5=Refresh.....	15
F6=Accept.....	15
F7=Backward.....	15
F8=Forward.....	15
F11=Fold.....	15
F12=Cancel.....	15
F23=More Actions.....	16
F24=More Keys.....	16
Generic help text for standard screens.....	16
Generic help text for list screens.....	16

Generic help text for filter screens.....	16
Generic help text for the run time parameter.....	16
Infor LX menus.....	17
ERPLX main menu.....	17
Configurable enterprise financials menu.....	17
Multi-mode manufacturing master menu.....	17
Supply chain management master menu.....	17
Cross-product application menu.....	17
Commonly used terms in Infor LX.....	18
Chapter 2 SAL Overview.....	21
General instructions.....	21
Application overview.....	21
Application Highlights.....	21
Other files that work in conjunction with Billing and Sales Analysis:.....	22
Application flow.....	22
Salesperson Maintenance.....	22
Commission Maintenance.....	22
Sales Inquiries.....	22
How-to Index.....	23
System parameters relevant to SAL.....	24
Chapter 3 Programs.....	25
Salesperson Master, SAL100D1.....	25
Add or select a salesperson.....	25
Add, maintain, delete, or view a salesperson.....	27
Salesperson master language override, SAL101D.....	29
Add or select an salesperson record.....	30
Filter options.....	30
Enter translated salesperson information.....	31
Salesperson List, SAL110D.....	32
Specify salespersons to list.....	32

Commission Rates, SAL120D1.....	33
Example.....	33
Add or select a commission rate structure.....	33
Maintain a sale commission rate structure.....	35
Commission Rates List, SAL125D.....	38
Select a commission rate.....	38
Salesperson Prospect X-Reference, SAL170D1.....	39
Add or select a salesperson-customer.....	40
Filter options.....	41
View cross-reference detail.....	42
Sales History, SAL300D.....	42
Specify company, item or salesperson.....	43
View customer sales details.....	45
View customer sales summary.....	47
View customer sales details, by item or class.....	49
View customer sales, by document number.....	50
View customer sales details, by order.....	52
View customer sales details, by shipments.....	54
View item sales.....	55
View item sales, by customer.....	56
View item sales, by shipment.....	57
View salesperson sales.....	58
View salesperson sales summary.....	59
View salesperson sales, by item.....	60
View salesperson sales, by class.....	61
View salesperson sales, by document number.....	62
View salesperson sales, by order number.....	63
View warehouse sales.....	65
Specify group sales analysis code.....	66
Month to Date Sales, SAL301D.....	67
View month to date sales.....	67

Group Sales Analysis Inquiry.....	67
View group sales information.....	68
View detailed group sales information.....	69
Salesperson Alpha Lookup, SAL310D.....	70
Specify a salesperson (SAL310D-01).....	70
Invoiced Purchase Orders, SAL315D.....	71
Specify the purchase order.....	71
View purchase order.....	72
Commission Generation, SAL600D.....	72
Generate commissions.....	73
Commission Payment List/Update, SAL610D.....	74
Determine the features of the report.....	74
Commission Maintenance, SAL620D1.....	75
Select a commission rate.....	76
Maintain a commission (SAL620D2-01).....	76
Appendix A Glossary.....	81

Index

About this document

How to read this document

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Chapter 1

Introduction to Infor LX



1

Overview of Infor LX

This topic contains information that pertains to all applications of the Infor LX product. This information enables you to perform the following tasks:

- Navigate through menus and screens
- Specify information in the fields on the screens
- Use the screen actions
- Access the online help text
- Become familiar with terms used throughout Infor LX

Navigation

The features described in the following paragraphs help you navigate within and between Infor LX screens and programs quickly and easily.

Menus

Use Infor LX menus to choose individual programs to process or view information. You can call individual applications directly from any menu.

Dates

Infor LX includes full support for dates up to and beyond the year 2000. Although most date fields display six characters, Infor LX stores the date as eight characters to include century information. Use Company Name and Date Format, SYS820, in the System Parameters Generation program, SYS800, to configure century dates and specify dates beyond 1999.

Attention key and quick access icon

The character-based user interface uses the attention key to directly access other programs, menus, and applications. On an Infor LX screen, press the Esc key.

The Webtop user interface uses the Quick Access icon to directly access programs. On an Infor LX screen, click the Quick Access icon.

You must have security authorization to use these features.

Look-up features

On the character-based user interface, a plus sign (+) indicates a prompt-capable field. Use F4 to display a look-up screen.

On the Webtop user interface, an arrow indicates a prompt-capable field. Click the arrow to display a look-up screen.

Most screens called from inquiry programs allow you to search for alphanumeric strings.

Remembered keys

Infor LX remembers certain key values, such as item number, salesperson, or container, in your workstation memory as you process information in certain programs. You can assign one of the following values to each field:

- 0. Infor LX automatically retrieves this value from remember key memory. Infor LX updates this value on a continual basis.
- 1. Infor LX automatically retrieves the value you specify in Display Remembered Keys, SYS080. It does not update the value from any other program.
- 2. Infor LX does not retrieve or update remembered key fields.

Use the Display Remembered Keys program, SYS080, to set up remembered keys.

Standard online help features

Many Infor LX programs display generic help text. Use F1 from within a field on the character-based user interface. Click the Show/Hide Help icon on the Webtop user interface. This generic help text includes help for standard line actions, standard screen actions, which are also called function keys or F keys, the run time parameter, and some screens types.

The information in the generic help text for line actions and screen actions in this document is not included in the help text for individual Infor LX programs and screens. If a line action or screen action other than those defined in the generic help text occurs in a program, the help text for that program describes the specific action.

Additional generic help text is stored in the SSARUNHT document for users of the character-based UI. You can print this document and the individual application run instructions, SSARUN01, SSARUN02, and so on, from the DOC menu on the IBM(R) iSeries(TM) in the character-based user interface.

Generic help text for line actions

Line actions

The following line actions are valid in numerous screens. They have the functions described in the following sections.

1=Create

Specify Create on the prompt line and a value in at least one key field to add new information to the file. The system displays maintenance screens on which you can specify the new data. The system prints the new data on the audit report.

Note: You cannot specify Create next to existing data.

1=Select

On a prompt screen, specify 1 to return the selected data to the original screen.

2=Revise

Specify Revise to change the information for a line. Specify 2 and a value in at least one key field or specify 2 next to a line. The audit report lists the change. If you specify Revise next to a line with inactive information, the system reactivates the information.

3=Copy

Specify Copy to copy existing information. You can specify 3 and a value for at least one key field or you can specify 3 next to a line. The system displays a maintenance screen on which you can specify new data and change existing data.

4=Delete

Specify Delete to deactivate the information on a line. You can specify 4 and a value in the key fields or you can specify 4 next to the line to delete. Use Revise to reactivate deleted information.

5=Display

Specify Display to view information. You can specify 5 and a value in the key fields or you can specify 5 next to a line.

6=Print

Specify Print to print information on the audit trail. You can specify 6 and a value in the key fields or you can specify 6 next to a line.

8=Position To

Specify Position To to move a line to the top of the list. You can specify 8 and a value in the key fields or you can specify 8 next to a line. The system repositions the list to begin with the requested line or, if the line does not exist, to the line that is next in sequence.

After you use the Position To feature, you can page down or you can use the Position To action with a different value, but you cannot page up. You can return to the top of the list if you specify Position To but do not specify a value in the key fields on the prompt line. On a prompt screen, display details matching the information you specified.

10=Search

On the top line of a prompt screen, use 10 and known field data to locate specific information.

Additional line actions

If a program contains additional line actions, see the line actions help text in that specific program for descriptions of those line actions.

Generic help text for screen actions

Many screen actions, also called F keys, perform the same function for every program or screen in Infor LX. Definitions for these screen actions follow.

Enter

Proceed to the next screen of a maintenance program. On the final screen, press Enter to update the file and return to the first screen of the program for additional maintenance activity.

Enter

Validate data in a screen. This function of Enter generally occurs in transaction programs that have an F6=Accept screen action, which saves the data on the screen.

Enter

Send the output from a report or listing program to an output queue for processing.

F1=Help

Display help text. This screen action applies to the character-based user interface only.

F3=Exit

Exit a program and do not record, update, or print the information you specified on the program screens.

F4=Prompt

Display a pop-up screen that lists existing values for the field. A plus (+) character denotes a prompt-capable field in the character-based user interface. In the Webtop user interface, the prompt-capable field has a small arrow that points to the right .

F5=Refresh

On a list screen, redisplay the screen to check the status of an executed function.

On a maintenance screen, redisplay the original values on the screen.

F6=Accept

Accept your changes and exit the program.

F7=Backward

Display previous lines, that is, those alphanumerically closer to A or those with earlier dates.

F8=Forward

Display additional lines, that is, those alphanumerically closer to Z or 9, or those with later dates.

F11=Fold

Display a folded view of the screen that contains additional information. Use F11 again to return the screen to its previous format.

F12=Cancel

Return to the previous screen and do not save values you specified on this screen. If you use F12 to return to a selection screen in a maintenance program, you cancel changes you made to any screens in the program.

F23=More Actions

Display additional line actions. If a screen has many screen actions, you may need to press F24 to see that there is an F23 action, which indicates that additional line actions are available.

F24=More Keys

Display additional function keys.

Generic help text for standard screens

Several categories of screens have identical functionality, though the content differs. These types of screens are explained in the following sections.

Generic help text for list screens

Many Infor LX programs contain screens with lists of information to specify for maintenance or inquiry. You have two options to specify the information to process on a list screen:

- Use the Act field and the key fields that appear at the top of the list.
- Specify a line action in the Act field of the line with the information you want to process.

After you make your entries, press Enter to perform the line action.

Generic help text for filter screens

Some Infor LX programs feature a filter screen, which you can access with F13. The filter screen enables you to filter the data to display. For example, if you use F13 in Warehouse Master Maintenance, INV110, you can display all records by warehouse or active records by warehouse or active records by description. Some filter screens provide sort or sequence options.

Generic help text for the run time parameter

Run Time Parameter (1,0):

Specify interactive to process the data in real time or batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Infor LX menus

This section describes the menus in Infor LX.

ERPLX main menu

The ERPLX Main Menu is the first of five master menus. You can access the four major Infor LX application groups from this menu:

- Configurable Enterprise Financials, CEF
- Multi-Mode Manufacturing, MMM
- Supply Chain Management, SCM
- Cross-Product Applications, XPA

Specify the abbreviated application group fast path code to access the master menu for the desired application group.

Configurable enterprise financials menu

Use the Configurable Enterprise Financials menu, CEF, to access Infor LX financial applications. Specify the application fast path code to access the desired application menu.

Multi-mode manufacturing master menu

Use the Multi-Mode Manufacturing master menu, MMM, to access Infor LX manufacturing applications. Specify the application fast path code to access the desired Infor LX application menu.

Supply chain management master menu

Use the Supply Chain Management master menu, SCM, to access Infor LX supply chain management applications. Specify the application fast path code to access the desired Infor LX application menu.

Cross-product application menu

Use the Cross Product Application menu, XPA, to access, analyze, and transmit information within Infor LX. Specify the application fast path code to access the desired Infor LX application menu.

Commonly used terms in Infor LX

Reference only

Reference only indicates that the system uses the information for the given field only for reference and does not use it for processing.

Extreme values by default

Some fields display extreme values by default. The system uses an alphanumeric or numeric extreme in these fields if you do not override the value. Use these default values, which are usually specified as ranges, to include all information in the range. The default values or any other values specified to designate a range do not have to be valid values in a database file.

(Y/blank)

If the screen displays (Y/blank) for a field, specify Y or Yes for a particular action to take place. Otherwise, leave the field blank. The screen displays (Y/N) if the field requires a Y or an N.

Ranges

Ranges refer to fields you can use to limit an inquiry or report or to display specific data. If there are multiple range fields in a program, you can tailor your inquiry or report to produce only the data you need.

Infor LX sorts the information alphanumerically. Therefore, the value in the *From* field must be a lower alphanumeric value than the value in the *To* field.

Infor LX usually inserts extreme values as defaults in the lower and upper fields. See the description for Extreme values by default. The entries you make in range fields do not have to be valid values in a database file.

Review the following suggestions to limit the information:

Specify the first value to include on the inquiry or report in the *From* field. Leave the *To* field blank to include all information to the end of the file. For example, you can print a report that starts with the customer number you specify in the *From* field and stops at the end of the Customer Master file.

Specify the last value to include on the inquiry or report in the *To* field. Leave the *From* field blank to start at the beginning of the file. For example, you can perform an inquiry that starts with the beginning of the Customer Master file and ends with the customer number you specify in the *To* field.

Specify the same value in both the *From* and *To* fields. For example, you can limit a display to one customer.

To include a group of items, specify a value in the *From* field and another value in the *To* field. For example, you can perform an inquiry that starts with the first of the month and ends with the last day of the month.

Alphanumeric

Alphanumeric refers to text that contains letters, letters and numbers together, and numbers arranged uniformly with special characters, such as dates in MM/DD/YY format. Infor LX sorts reports and inquiries in ascending alphanumeric order, unless indicated otherwise. Ascending order arranges items from the lowest value to the highest value. Alphanumeric text is sorted in ascending order according to the following rules:

- Special characters, such as \$, %, - (hyphen), comma, and period, come before all others
- Lowercase letters come before uppercase letters
- Uppercase letters come before numbers
- Numbers, that is, 0 through 9, come last

A/R, A/P

The documentation uses the abbreviations A/R and A/P to denote the terms accounts receivable and accounts payable, respectively. The abbreviations distinguish the terms from the corresponding program indicators of ACR, and ACP, which precede program numbers, for example, ACR500 and ACP150.

Ranges

Ranges refer to fields you can use to limit an inquiry or report or to display specific data. If there are multiple range fields in a program, you can tailor your inquiry or report to produce only the data you need.

Infor LX sorts the information alphanumerically. Therefore, the value in the *From* field must be a lower alphanumeric value than the value in the *To* field.

Infor LX usually inserts extreme values as defaults in the lower and upper fields. See the description for Extreme values by default. The entries you make in range fields do not have to be valid values in a database file.

Review the following suggestions to limit the information:

Specify the first value to include on the inquiry or report in the *From* field. Leave the *To* field blank to include all information to the end of the file. For example, you can print a report that starts with the customer number you specify in the *From* field and stops at the end of the Customer Master file.

Specify the last value to include on the inquiry or report in the *To* field. Leave the *From* field blank to start at the beginning of the file. For example, you can perform an inquiry that starts with the beginning of the Customer Master file and ends with the customer number you specify in the *To* field.

Specify the same value in both the *From* and *To* fields. For example, you can limit a display to one customer.

To include a group of items, specify a value in the *From* field and another value in the *To* field. For example, you can perform an inquiry that starts with the first of the month and ends with the last day of the month.

General instructions

This document is divided into the following sections:

- **Application overview:** This section provides a general description of the functions and highlights of the Sales Analysis application.
- **Application flow:** This section describes prerequisites to operate Sales and Commission Analysis, the sequence in which to run its programs, and its functions.
- **How-to index:** This section is an alphabetical list of Sales and Commission Analysis functions. Next to each function is the number of the program.
- **System parameters relevant to SAL:** This section discusses SAL system parameters that you set with the Parameter Generation program, SYS800, from the SYS Menu.

Application overview

Use the Sales Analysis application to maintain information about salespeople, to make extensive inquiries into sales history, and to maintain and process commissions. Use the Infor LX Information Retrieval program to generate reports.

The Sales Analysis application and the Billing application work together and you always install both. Read the documentation for the Billing application for more detailed information about that application.

Application Highlights

With the SAL application you can perform the following tasks:

- Establish and maintain information about salespeople.
- Make inquiries into salesperson information, sales history data (by customer, item, salesperson, and warehouse), and invoiced purchase orders.
- Establish and maintain rates of commission according to customer, item, and salesperson.

- Update the amount of the commission payable to salespeople.
- Print listings of salesperson information, commission rates, and commission payments.

Other files that work in conjunction with Billing and Sales Analysis:

- Accounts Receivable (Company, Profit center, Terms, Salesmen, Customer master)
- Configurable Order Management files (Customer Address master)
- Promotions and Deals files (Special Pricing)
- Sales Report Definition

Infor recommends that you design, build and test your sales reports as soon as possible, although the system can process sales information before you create reports. Infor LX maintains all the sales information automatically. This document does not describe how to define reports.

Application flow

Salesperson Maintenance

Create, view, revise, or delete salespeople with the Salesperson Master program, SAL100. The Salesperson Master file stores the salesperson's name, address, telephone number, and commission code.

Infor LX automatically posts all regular charge lines on invoices from the Billing product to the sales fields on the master files. The system summarizes special charge lines to the Invoice History file, SIH.

You can print a list of the contents of the Salesperson Master file, SSM, through the Salesperson List program, SAL110.

Commission Maintenance

Use Sales Commission Rates Maintenance, SAL120, to create commission code structures. You can create a commission code structure for a customer, an item, and up to three salespeople. The system stores commission rate information in the Sales Commission Rate file, SCR, and you can print the information in Commission Rates List, SAL125.

Sales Inquiries

The Sales Analysis application provides the following inquiries:

- Salesperson Alpha Lookup program, SAL310: Use this program to view identifying information about your sales staff from the Salesperson Master file, SSM.
- Sales History Inquiry, SAL300: Use this program to view information from the Sales History file. You can inquire into sales by: customer, item, salesperson, or warehouse. Several of

these inquiries allow you to display even more specific information such as a customer's sales history by item, or a summary of a salesperson's sales.

- Invoiced Purchase Orders, SAL315: Use this program to view a customer's purchase order history, including the invoice and order numbers associated with the P.O., as well as the profit margin, the invoiced amount minus its cost.

The system stores sales analysis data in the following files:

- Item Master, IIM: This file stores month-to-date and year-to-date amount sales, amount costs, and unit sales.
- Customer Master, RCM: This file stores the last twelve months' amount sales, with year-to-date and prior year-to-date sales.
- Salesperson Master, SSM: This file stores the last twelve months' amount sales, with year-to-date and prior year-to-date sales.
- Sales History, SSH: This file stores month-to-date and year-to-date sales amount, cost, and unit sales by item and customer.
- Transaction History, ITH: This file stores each shipment transaction with customer number, invoice number, quantity, scheduled date, and so forth.
- Invoice History, SIH: This file stores invoice header data such as total amount, customer number, order number, cost, total of special charges, and so forth.
- Invoice Line History, SIL: This file stores invoice line data such as amount, tax rates, commission codes, item and quantity.
- Warehouse Master, IWM: This file stores the last twelve months' amount sales, with year-to-date and prior year-to-date sales.
- Sales Detail, SSD: This file stores the last twelve months' unit sales by item and warehouse, with year-to-date and last year-to-date sales and cost data.

How-to Index

The following list provides a quick reference to the processes that you can perform in this application and the programs that you use for each process:

- Delete a salesperson - SAL100
- Enter a commission percentage - SAL120
- Enter a new salesperson - SAL100
- Generate commissions - SAL600
- Inquire on invoiced purchase orders - SAL315
- Inquire on sales history - SAL300
- Inquire on salespersons, by name - SAL310
- List commission payments - SAL610
- List commission rates - SAL125
- List the salesperson file - SAL110
- Maintain commission amounts payable - SAL620

- Maintain commission codes - SAL120
- Maintain commission payments - SAL610
- Maintain sales commission rates - SAL120
- Maintain salesperson files - SAL100
- Override date for exchange rate - SAL600
- Select a sales commission rate - SAL120
- Update a commission payment - SAL610
- View a list of salespeople - SAL100

System parameters relevant to SAL

You must set system parameters before you use SAL. To change or specify system parameters, use the Parameter Generation program, SYS800, from the SYS Menu. Use SAL System Parameters, SAL820D, to determine user-defined fields for group sales analysis purposes. Use Commission Processing Parameters, SAL821D, to establish the following parameters for commission processing:

- Whether to pay commissions based on specific items (invoice line level detail or based on an entire order)
- Whether to pay commissions when you invoice the customer or when the customer has paid the invoice in full
- Whether to pay the salesperson commissions for services performed (special lines on the invoice) or only for inventory items sold (regular lines on the invoice)

Salesperson Master, SAL100D1

Use the Salesperson Master program, SAL100D1, to maintain information about salespeople. You can maintain the salesperson's name and address information, and you can assign a commission code to the salesperson. The system uses this code in Commission Generation, SAL600, to determine which commission structure to apply to orders booked by this salesperson. The Salesperson Master file, SSM, stores salesperson information.

Access: SAL menu

Add or select a salesperson

Use the Salesperson Master Selection screen, SAL100D1-01, to add a new salesperson or to select a salesperson record to process.

Field descriptions - SAL100D1-01

Fields	Description
Line actions	The action codes described in the following section are available: 11=Prospect X-Reference Access SAL170D1-01 to display or maintain the customer cross-reference for this salesperson. This action code is available if CRMi is installed. 14=Language Override Display the Salesperson Master Language Override screen, SAL101D1-01. The list is positioned at the routing item that you selected on SFC101D1-01. Select a routing selection and the language for translation.

49=User Defined Fields

Access SYS109D1-01 to display or maintain user-defined data for this application.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 13)* in the overview information in this document.

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

11=Prospect X-Reference

Access SAL170D1-01 to display or maintain the customer cross-reference for this salesperson. This action code is available if CRMi is installed.

14=Language Override

Display the Salesperson Master Language Override screen, SAL101D1-01. The list is positioned at the salesperson record that you selected on SFC101D1-01. Select a salesperson record and the language for translation.

49=User Defined Fields

Access SYS109D1-01 to display or maintain user-defined data for this application.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 13)* in the overview information in this document.

**Salesperson Number
(6,0):**

Specify the number of the salesperson to maintain.

Screen actions - SAL100D1-01

Commands	Description
F13=Filters	Display the Filter Options screen to select between display of all records sorted by Salesperson, or only active records, sorted by Salesperson or by Salesperson Name.
F14=Language Overrides	Display the Salesperson Master Language Override screen, SAL101D-01, to select a salesperson record for translation.
F15=Toggle Language	Use F15=Toggle Language to switch between the salesperson record in the master file (base) language and in your language, assuming the salesperson information was translated into your language. All other line actions on this screen perform standard Infor LX functions. See <i>Generic help text for line actions (p. 13)</i> in the overview information in this document.

Add, maintain, delete, or view a salesperson

Use the Salesperson Master Maintenance screen to view, modify, or provide information for a salesperson.

Field descriptions - SAL100D2-01

Fields	Description
Company (3,0):	Specify the code of the company associated with this salesperson. The company determines the currency for the salesperson's commissions. The system pays salespeople in the company's default currency.
Salesperson Name (30,A):	Specify the name of the salesperson to maintain. The system displays this name on inquiries and prints the name on various reports. Note: The Salesperson Alpha Lookup program, SAL310, searches on the first character in this field. To perform searches later with the salesperson's last name, specify the last name first in this field, for example Doe, Jane.
Address Line 1 (50,A):	Specify the address for the salesperson.
Address Line 2 (50,A):	Specify the address for the salesperson.
Address Line 3 (50,A):	Specify the address for the salesperson.

Address Line 4 (50,A): Specify the address for the salesperson.

Address Line 5 (50,A): Specify the address for the salesperson.

Address Line 6 (50,A): Specify the address for the salesperson.

State (3,A): Specify the state for the salesperson.

Country (4,A): Specify the country code for the salesperson.

Postal Code (9,A): Specify the postal code for the salesperson.

Phone Number (25,A): Specify the phone number for the salesperson.

Fax Number (25,A): Specify the fax number for this salesperson.

E-Mail Address(80,A): Specify the e-mail address for this salesperson.

Commission Code (2,A): Specify the commission code for this salesperson. You can define commission codes for customers, items, and salespeople. These codes, or any combination of them, act as a group to determine sales commission rates in the Sales Commission Rates Maintenance program, SAL120. Infor LX carries the commission code throughout the order entry and billing processes into the invoice history file, SIH.

Note: In order entry and billing, the commission code associated with a salesperson number, not the salesperson number itself, determines the percentage commission. See Commission Rates Maintenance, SAL120, for more information.

Pay Comm by <Weight> (1,A): Specify a number to indicate whether the system pays commissions based on weight. Valid choice are:

1

Yes, generate commissions based on weight. When Infor LX generates commissions for DWM items, it uses the DWM dual unit of measure value <Weight> on the invoice line, not on the amount.

0

No, generate commissions in conjunction with rates set up on the Commission Rate file.

The system retrieves the actual commission rate from the Commissions Rate Maintenance file, Comm. Rate per DWM Pricing U/M, and multiplies it by the

DWM dual unit of measure value <weight> to calculate the commission payable.

Region Code (10,A): Specify the region code for this salesperson. The region code determines the region-specific attributes such as time zone and date and decimal formats for this salesperson.

Screen actions - SAL100D1-01

Commands	Description
F21=Language Overrides	Display the Salesperson Master Language Override screen, SAL101D-01, to select a salesperson record for translation.
F22=Toggle Language	Use F15=Toggle Language to switch between the salesperson record in the master file (base) language and in your language, assuming the salesperson information was translated into your language.
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Salesperson master language override, SAL101D

Use this program to enter the translation for salesperson descriptions. The screen lists existing records in the Salesperson Master Maintenance MLS file, SSX. See Auto Create Language Record, SYS091D, and Mass Create Language Records, SYS092D, for more information.

If you use the auto create feature, the list of salesperson records on the SAL101D-01 screen includes changes made in Salesperson Master Selection, SAL100D1. The new and updated records have status Review Required. When you translate the descriptions and press Enter, the status changes to Active.

If you did not auto-create the SSM records, use action 1=Create to create the records in this program. When you create a record in the language extension file, the system copies the record, in the master file (base) language, from the Salesperson Master file, SSM, to the SSX file. The record is then available for translation.

If you use the Infor Development Framework (IDF) you must create a blank Language record in SYS091D for File 021 and Language Code ***. SAL100D2 automatically creates and maintains this record. The blank Language record is not listed on SAL100D-01 and you cannot revise or delete it. To display or copy the record, enter action 5=Display or 3=Copy, specify the order class code and leave the language field blank.

Access:

- Menu SAL01
- Action 14=Language Override from the Order Class Maintenance screen, SAL100D1-01
- F14=Language Override from the Order Class Maintenance screen, SAL100D2-01
- F21=Language Override from the Order Class Maintenance screen, SAL100D2-01

Add or select an salesperson record

Use the Salesperson Master Language Override screen, SAL101D-01, to add or select a salesperson record to translate.

Field descriptions - SAL101D-01

Fields	Description
Line actions	All line actions on this screen perform standard Infor LX functions. See <i>Generic help text for line actions (p. 13)</i> in the overview information in this document.
Act (2,0):	Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.
Salesperson (6,0):	Specify the salesperson number to create or copy.
Language (3,A):	Specify the language to use in the translation.

Screen actions - SAL101D-01

Commands	Description
F13 = Filters	<p>Access the Filter Options screen to select from the following sequences:</p> <p>1=Salesperson/Language - Active</p> <p>2=Salesperson/Language - All</p> <p>3=Only Review Required Records</p> <p>All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

Filter options

Use the Filter Options screen to limit the list of order class records.

Field descriptions - Filter

Fields	Description
Filter Options (1,0):	Specify one of the following options to limit the list of records. 1=Salesperson/Language - Active 2=Salesperson/Language - All 3=Only Review Required Records
Language (3,A):	Specify a language to display only records for that language.

Screen actions - Filter

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Enter translated salesperson information

Use the Salesperson Information - Language Maintenance screen, SAL101D-03, to enter the translated description for the salesperson information that you selected on the previous screen.

The screen displays the salesperson address information, in master file (base) language, from the Salesperson Record master file, SSM. Enter the translation. When you press Enter, the system updates the Salesperson Record MLS file, SSX.

Field descriptions - SAL101D-03

Fields	Description
Salesperson Number (6,0):	If you are in Create or Copy mode, specify the salesperson number to create or copy.
Language Code (3,A):	If you are in Create or Copy mode, specify a language to use for translation.

Salesperson Name (30,A): Specify the salesperson name.

Salesperson Address (50,A): Specify the salesperson address information.

Screen actions - SAL101D-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Salesperson List, SAL110D

Use Salesperson List, SAL110D, to print a report of all salespeople in the Salesperson Master file, SSM. The system sorts the report numeric order by salesperson number.

Access: SAL menu

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the *Ranges* topic in the overview section of this document.

Specify salespersons to list

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the *Ranges* topic in the overview section of this document.

Field descriptions - SAL110D-01

Fields	Description
From Salesperson Number (6,0):	Specify a range of values to limit the salesperson numbers included in the report.
To Salesperson Number (6,0):	Specify a range of values to limit the salesperson numbers included in the report.

Screen actions - SAL110D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Commission Rates, SAL120D1

Use Commission Rates, SAL120D1, to maintain commission rate structures. Commission Generation, SAL600, uses commission rate structures to determine commissions. The system stores commission rate structures in the Sales Commission Rate file, SCR.

The system calculates a salesperson's commission based on the combination of the salesperson's commission code, the customer commission code, and the item commission code. The system can split a commission between as many as three salespeople.

The system uses the salesperson's commission code along with the customer and item commission codes to indicate the correct percentage or rate of commission. Use the Sales Commission Rates Maintenance screen, SAL120D2-01, to specify the commission rate or percentage.

Example

For example, you pay a salesperson, S2, commission on all orders booked for a particular customer, C1. Specify the salesperson code and the customer code on screen SAL120D1-01 and then proceed to the second screen, SAL120D2-01. Specify the percentage commission that salesperson S2 earns on every order booked for customer C1.

Now assume that you pay salesperson S2 a special commission rate for customer, C1 for sales of a new item, I3. You can create a new commission rate structure for this. When you enter the item code, I3, on the first screen along with customer commission code C1 and salesperson commission code S2, you create a new, different, structure. On SAL120D2-01 specify the commission percentage that you pay salesperson for sales of item I3.

If a commission code is set up only for a salesperson on screen SAL120D1-01, and not for a customer and item, the salesperson receives the commission rate established on screen SAL120D2-01 for all orders created with his or her commission code.

Access: SAL menu

Add or select a commission rate structure

Use the Sales Commission Rates Selection screen, SAL120D1-01, to add a new commission rate structure. or to revise, delete, display, or print an existing structure.

Definition with Wildcard

A wildcard (*) can be used to define or set up commission codes for groups of customers, items, and salespersons. There are two ways to define commission codes:

- Specify A* (for example) to define rates for any commission code that begins with A and is not already defined. For example, Item Commission Code "I1" applies for items specifically defined with that commission code. However, Item Commission Code "I*" applies for items defined with any item commission code starting with I that is not already defined.
- Specify *B (for example) to apply to a commission rate that ends with B that is not already defined.

When qualifying commission rates, the system considers specific code values first (for example, A1 or B2), then wildcard values.

Field descriptions - SAL120D1-01

Fields	Description
Customer Commission Code (2,A):	Specify the customer commission code for the commission rate structure to maintain. Assign customer commission codes to customers in IDF Customer.
Item Commission Code (2,A):	Specify the item commission code for the commission rate structure to maintain. Assign item commission codes to items in IDF Enterprise Item.
Salesperson 1 Commission Code (2,A):	Specify the commission code for a salesperson. You can specify up to three salespeople to share the commission. If you specify more than one salesperson commission code, you must specify a corresponding commission percentage for each salesperson on the next screen, SAL120D2-01.
Salesperson 2 Commission Code (2,A):	Specify the commission code for a salesperson. You can specify up to three salespeople to share the commission. If you specify more than one salesperson commission code, you must specify a corresponding commission percentage for each salesperson on the next screen, Sales Commission Rates Maintenance, SAL120D2-01.
Salesperson 3 Commission Code (2,A):	Specify the commission code for a salesperson. You can specify up to three salespeople to share the commission. If you specify more than one salesperson commission code, you must specify a corresponding commission percentage for each salesperson on the next screen, Sales Commission Rates Maintenance, SAL120D2-01.

Screen actions - SAL120D1-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Maintain a sale commission rate structure

After you specify a rate structure, use the Sales Commission Rates Maintenance screen, SAL120D2-01, to modify or specify rate information.

Examples of split commissions

Order Entry uses the procedures described below to calculate split commissions. If you do not specify values in the Commission Code fields in Order Entry, the system uses the salesperson's default commission code. You can override the default.

The first example describes two salespeople who split the commission on an order. The second example describes two salespeople who split the commission on an order by order line. The third example shows three salespeople who split the commission on an order.

Example 1

If two salespeople split the commission on an order, specify the salespeople on the order header pane. Specify the first salesperson and commission code in the Salesperson/CC field, and the second in the Split fields. The order in which you specify these two commission codes determines the percentage split.

The commission code, not the salesperson number, determines the Commission Percentage in the Commission Rates Maintenance program

Assume you have set up a commission rate structure in Commission Rates, SAL120, with the following information:

- No customer commission code.
- No item commission code.
- First salesperson's commission code is AA.
- Second salesperson's commission code is BB.
- No salesperson 3 commission code.

and the following rates on the Sales Commission Rates Maintenance screen, SAL120-02:

- Salesperson 1 Commission Percentage is 2.00
- Salesperson 2 Commission Percentage is 1.00
- No Salesperson 3 Commission percentage.

Specify the following information when you perform order entry: Specify the first salesperson number and commission code, AA, in the Salesperson/CC fields. Specify the second salesperson number and commission code, BB, in the Split fields.

Example 2

This example describes a commission by order line split between two salespeople. When two salespeople split the commission on only specific lines of an order, you specify the second salesperson's information on the folded lines of the order, not on the header screen. Assume you have set up a commission rate structure in Commission Rates, SAL120, with the following information:

- No customer commission code.
- No item commission code.
- First salesperson's commission code is AA.
- No salesperson 2 commission code.
- Third salesperson's commission code is BB.

and the following rates on the Sales Commission Rates Maintenance screen, SAL120-02:

- Salesperson 1 Commission Percentage is 2.00
- No Salesperson 2 Commission Percentage
- Salesperson 3 Commission Percentage is 1.00

Example 3

If three salespeople split commission on an order, specify information for the first two salespeople on the order header screen. Specify the first salesperson and commission code in the Salesperson/CC field, and the second in the Split fields. Then, use Fold to specify the third salesperson and the associated commission code on the individual lines of the order.

Assume you have set up a commission rate structure in Commission Rates, SAL120, with the following information:

- No customer commission code.
- No item commission code.
- First salesperson's commission code is AA.
- Second salesperson's commission code is BB
- Third salesperson's commission code is CC.

and the following rates on the Sales Commission Rates Maintenance screen SAL120-02:

- Salesperson 1 Commission Percentage is 2.00
- Salesperson 2 Commission Percentage is 1.00
- Salesperson 3 Commission Percentage is 0.50

Field descriptions - SAL120D2-01

Fields	Description
Salesperson 1 Commission Percentage (9,5):	Specify the percentage of commission that the system pays the salespeople for the customer, item, and commission codes displayed. A salesperson can receive a commission based totally on his or her own commission code as well. If you use more than one salesperson commission code, specify the corresponding percentages in the correct order. That is, the Salesperson 1 Commission Code must correspond to the Salesperson 1 Commission Percentage.
Salesperson 2 Commission Percentage (9,5):	Specify the percentage of commission that the system pays the salespeople for the customer, item, and commission code displayed. See the description for the previous field for more details.
Salesperson 3 Commission Percentage (9,5):	Specify the percentage of commission that the system pays the salespeople for the customer, item, and commission code displayed. See the description for the previous field for more details.
Commission Rate per DWM Pricing U/M	<p>Specify the rate to use to calculate the commission amount for salespersons that are paid commission by weight, rather than by the invoice line amount. If the item is a DWM item and the Pay Comm by <Weight> flag in the Salesperson Master Maintenance screen is set to 1=Yes, the system multiplies the weight on the invoice line by the rate in the Sales Commission Rates file to calculate the commission.</p> <p>You can also use the existing Commission Percentage rate with non-DWM items. If the Commission at Line Levels value in Commission Processing System Parameters, SAL821D, is set to 0=No, meaning that that commissions is calculated at the invoice header level, the commission by weight feature does not apply. In this case the system uses the percentage specified here to calculate commission based on the invoice header amount.</p>

Screen actions - SAL120D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Commission Rates List, SAL125D

Use Commission Rates List, SAL125D, to print reports of the commission rates stored in the Sales Commission Rates file, SCR, and maintained through the Sales Commission Rates Maintenance program, SAL120. The list is sorted by Customer, Item, and Salesperson Code.

Access: SAL menu

Select a commission rate

The Sales Commission Rates Listing screen, SAL125D-01, contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the *Ranges* topic in the overview section of this document.

Field descriptions - SAL125D-01

Fields	Description
From Customer Commission Code (2,A):	Specify a range of values to limit the customer commission codes to include in the list.
To Customer Commission Code (2,A):	Specify a range of values to limit the customer commission codes to include in the list.
From Item Commission Code (2,A):	Specify a range of values to limit the item commission codes to include in the list.
To Item Commission Code (2,A):	Specify a range of values to limit the item commission codes to include in the list.

- From Salesperson 1 Commission Code (2,A):** Specify a range of values to limit the salesperson commission codes to include in the list.
- To Salesperson Commission 1 Code (2,A):** Specify a range of values to limit the salesperson commission codes to include in the list.
- From Salesperson 2 Commission Code (2,A):** Specify a range of values to limit the salesperson commission codes to include in the list.
- To Salesperson 2 Commission Code (2,A):** Specify a range of values to limit the salesperson commission codes to include in the list.
- From Salesperson 3 Commission Code (2,A):** Specify a range of values to limit the salesperson commission codes to include in the list.
- To Salesperson 3 Commission Code (2,A):** Specify a range of values to limit the salesperson commission codes to include in the list.
- Run Time Parameter (1,A):** Specify interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - SAL125D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Salesperson Prospect X-Reference, SAL170D1

Use the Salesperson Prospect X-Reference, SAL170D1, to maintain a cross reference of a salesperson and the salesperson's customers that were converted from prospects in CRMi. To send a quote to a prospect in CRMi, you must assign an Infor LX customer to the quote.

When you create a quote for a prospect in CRMi, you can select the customer that most closely matches the characteristics of the CRMi prospect who desires a quote.

Access: SAL menu; SAL100D1-01, action code 11; ORD700D during quote creation

Add or select a salesperson-customer

If you enter this program during creation of a quote, select the customer that most closely matches the quote's requirements. If you enter this program from a menu, you can add a new salesperson and customer cross reference or view existing cross-reference records.

Use the input fields to reposition the list.

Field descriptions - SAL170D1-01

Fields	Description
Actions	All line actions on this screen perform standard Infor LX functions. See <i>Generic help text for line actions (p. 13)</i> in the overview information in this document.
Act (2,0):	Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. All line actions on this screen perform standard Infor LX functions. See <i>Generic help text for line actions (p. 13)</i> in the overview information in this document.
Salesperson (6,0):	Specify the number of the salesperson.
Customer (8,0):	Specify the number of a customer.
Company (3,0):	Specify the company number for this customer.
Currency (3,A):	Specify the currency code for this customer.
Country (4,A):	Specify the country code of this customer address.
State (3,A):	Specify the state or province of this customer address.
Tax Code (5,A):	Specify the customer tax code.

Screen actions - SAL170D1-01

Commands	Description
F13=Filters	Display the Filter Options screen to sort the display of cross-reference records.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 13)* in the overview information in this document.

Filter options

Use the Filter Options screen to limit the list of customer records.

Field descriptions - Filter

Fields	Description
Sequence (1,0):	Specify a sequence for the display of the cross-reference records: 1=Salesperson/Customer 2=Salesperson/Currency/Customer 3=Salesperson/Currency/Country/State/Customer 4=Salesperson/Tax Code/Customer 5=Salesperson/Tax Code/Country/State/Customer 6=Customer/Salesperson
Salesperson (6,0):	Specify a salesperson to display only records for that salesperson.
Company (3,0):	Specify a company to display only cross-reference records for that company.
Currency (3,A):	Specify a currency to display only cross-reference records for that currency.
Country Code (4,A):	Specify a currency to display only cross-reference records for that currency.
Filter options (1,0):	Specify a filter option: 1=Active Records Only 2=All Records

Screen actions - Filter

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

View cross-reference detail

Use the Salesperson Prospect X-Ref Detail screen, SAL170D2-01, to view the customer information.

Screen actions - SAL170D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Sales History, SAL300D

Use Sales History, SAL300D, to make sales history inquiries based on customer sales, item sales, salesperson sales, and warehouse sales. You can view the following sales information in these inquiries, although not all types of information apply to every type of inquiry:

- Detail information
- Sales item detail
- Item class detail
- Shipments detail
- Sales summary
- Invoice history
- Order history

Infor LX obtains sales information from the following files:

- Sales History, SSH,
- Invoice History, SIH
- Salesperson Master, SSM
- Customer Master, RCM
- Item Master, IIM
- Warehouse Master, IWM

- Transaction History, ITH

From Sales History you also can access the following inquiry programs:

- Customer Alpha Lookup, ACR310
- Item Alpha Lookup, INV350
- Salesperson Alpha Lookup, SAL310
- Group Sales Analysis Inquiry, SAL305
- Material Status Inquiry, INV300

Access: SAL menu, or BIL menu, or use F14 from Promotions and Deals Inquiry, PRO300-01, or use F15 from Customer Order Inquiry, ORD300-01, or use F15 from Quote Inquiry, ORD330-01, or use F15 from RMA Inquiry, ORD335-01.

Use the first screen to determine which inquiry Infor LX displays. You can make inquiries into sales history by Customer, Item, Salesperson, or Warehouse. Select only one inquiry at a time. The field in which you make an entry determines the inquiry to display.

Note: For customer, item, or salesperson inquiries, enter the number or the name of the customer, item, or salesperson. The system uses only one entry on the screen to make the inquiry. For example, if you specify a customer number and an item name, Infor LX displays only the customer inquiry.

Specify company, item or salesperson

Specify whether you want to view the sales history for a company, an item, a salesperson or a warehouse.

Field descriptions - SAL300D-01

Fields	Description
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Customer Number (8,0): Specify a customer number for a customer sales inquiry.

Customer Name (50,A): Specify the alpha search key of the desired customer. Capitalize the first letter of the customer alpha search key if it is capitalized in the Customer File. Infor LX searches for lower-case letters first, then upper-case letters.

If you specify a customer name or partial name and press Enter, Infor LX displays customer sales information for the first customer record most nearly matching your entry. If you specify a customer name and use F14, Infor LX opens Customer Alpha Lookup, ACR310, and displays the first customer record that matches your entry.

Infor LX ignores any value in this field if you specify a customer number.

Item Number (35,A): Specify an item number for an item sales inquiry.

Item Description (50,A): Specify an item description for the item inquiry. Infor LX ignores any value in this field if you specify an item number.

When you specify an item description or partial description and press Enter, Infor LX displays item sales information for the first item record most closely matching your entry.

Salesperson Number (6,0): Specify a salesperson number for a salesperson sales detail inquiry.

Salesperson Name (30,A): Specify a salesperson's name for the sales inquiry. Infor LX ignores any entry in this field if you specify a salesperson number.

If you specify a salesperson name or partial name and press Enter, Infor LX displays salesperson sales information for the first salesperson record most nearly matching your entry.

Warehouse (3,A): Specify a warehouse code for a warehouse sales inquiry.

Screen actions - SAL300D-01

Commands	Description
F14=Customer Alpha	Access Customer Alpha Lookup, ACR310, to review and select a customer number or name for the sales inquiry. Refer to the Accounts Receivable document for more information.
F15=Salesperson Alpha	Access Salesperson Alpha Lookup, SAL310, to review and select a salesperson number or name for the sales inquiry. Refer to the discussion of Salesperson Alpha Lookup, SAL310, for more information.
F17=Material Status	Access Material Status Inquiry, INV300, to review item information from the Item Master file, IIM. Refer to the Inventory document for more information.
F19=Product Groups Select	Display the Group Sales Analysis Inquiry selection window, WINGRP. Use Group Sales Analysis Inquiry, to limit the selection of data displayed on Group Sales Analysis screens, SAL305, to the Customer Group Sales Analysis and Item Group Sales Analysis codes that you select.
F20=Item Alpha	Access Item Alpha Lookup, INV350, to review and select an item number or description for the sales inquiry. Refer to the Inventory document for more information.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 14)* in the overview information in this document.

View customer sales details

Use the Customer Sales Detail Information screen, SAL320D-01, to view information about the sales for a specific customer.

Infor LX displays the Customer Sales Detail Information screen, SAL320D-01, if you specify a customer number or customer name on the Sales Inquiry Selection screen, SAL300-01, and press Enter.

The Customer Sales Detail Information screen displays the following information:

- Customer number and name
- Primary Salesperson number and name
- Company's number and name

The fields in the upper right corner of the screen summarize the following information:

- MTD Sales. This is the month-to-date sales (monetary) amount. On the detail screen, month-to-date sales includes inventory items, special lines and freight.
- YTD Sales. This is the current year-to-date sales (monetary) amount. The display only includes months in the current fiscal year. On the detail screen, month-to-date sales include inventory items, special lines and freight.
- Last YTD Sales. This is previous year-to-date sales (monetary) amount. This covers the same time period as the current year-to-date.

Field descriptions - SAL320D-01

Fields	Description
Sales MTD:	The Sales MTD includes: <ul style="list-style-type: none"> ■ Sales for the current month to date. ■ Sales for each of the previous twelve months ■ Sales for the average per month for the 13 months ($a + b / 13$).
Pct of Total:	This column shows the percentage of the thirteen-month sales total that the amount to the left represents.
Date Opened:	This is the date you established this customer on the Customer Master File, RCM, in IDF Customer.

- Avg Doc Size:** The Average Document Size is the average invoice amount for this customer, which Infor LX calculates on a moving average basis. Infor LX calculates the moving average as $0.9 \times (\text{Previous average size}) + .1 \times (\text{New invoice size}) = \text{New average invoice}$.
- Avg Pay Days:** The Average Payment Days is the average number of days the customer takes to pay an invoice, excluding credit memos. Infor LX calculates the average as $0.9 \times (\text{Previous average days}) + .1 \times (\text{New number of days}) = \text{New average days}$.
- Last Trans Date:** The Last Transaction Date is the last A/R transaction date (invoice, payment, debit, or credit).
- Last Pay Date:** This is the date of the customer's last payment.
- Last Pay Amt:** This is the amount of the customer's last payment.
- Terms code, description:** These two fields show the terms code and the description of the terms. Define the terms code and description in Terms Code Maintenance, ACR110. Assign the terms code to a customer in IDF Customer.
- Due Days:** Due Days is the number of days after the invoice date that the invoice is due. The default value comes from the Terms Code file, which you maintain in Customer Terms, ACR110.
- Discount Days:** Discount Days is the number of days after the invoice date that the discount is available. The default value comes from the Terms Code file, which you maintain in Customer Terms, ACR110.
- Discount Pct.:** This is the discount percentage that you can apply to this invoice, if the customer pays within the discount days range. The default value comes from the Terms Code file, which you maintain in Customer Terms, ACR110.
- Override Due Date:** You can override the terms in the Terms Code file in Customer Terms, ACR110. If you specify a different due date, the system shows that date here.

Screen actions - SAL320D-01

Commands	Description
F4=Prompt	Display a window with a graph that shows MTD Sales by Customer.
F14=Summary	Access the Customer Sales Summary screen, SAL320D-02. This screen displays month-to-date and year-to-date values for this customer's units sold (quantity), sales (monetary), cost, margin, and margin per unit, and, for DWM

items, the value equivalent to the units expressed in the DWM dual unit of measure <Wght>. month-to-date and year-to-date sales for the summary screen include inventory items only; return to the detail screen to include special lines and freight.

F16=Items

Access the Customer Sales Item Detail screen, SAL320D-03 and the Customer Sales Class Detail screen, SAL320D-04. For each item, these screens display month-to-date and year-to-date values for sales units (quantity), sales amount (monetary), and sales cost.

For DWM items, the screens display the value equivalent to the units expressed in the DWM dual unit of measure <Wght>.

F17=Documents

Access the Customer Sales Invoice History screen, SAL320D-05. This screen displays the following data, sorted by originating prefix and document number: the corresponding order number, document date, document type, total document amount, document cost, and document margin. If you fold this screen, Infor LX displays the salesperson number and name and the customer purchase order number.

F18=Orders

Access the Customer Sales Order History screen, SAL320D-06. This screen displays the following data, sorted by order number: originating prefix and document number, document date, document type, total document amount (monetary), document cost, and document margin.

F20=Shipments

Access the Customer Sales Shipment Detail screen, SAL320D-07. This screen displays the following information for each item: the order number, ship date, warehouse/location, ship quantity, and ship amount (monetary). If you fold this screen, Infor LX displays the item description and the lot number, if the item is lot controlled.

For DWM items, the screen also displays the DWM dual unit of measure value <Weight> that corresponds to the ship quantity.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 14)* in the overview information in this document.

View customer sales summary

Use the Customer Sales Summary screen, SAL320D-02, to display month-to-date and year-to-date values for this customer's units sold (quantity), sales (monetary), cost, margin, and margin per unit, and, for DWM items, the value equivalent to the units expressed in the DWM dual unit of measure <Wght>. month-to-date and year-to-date sales for the summary screen include inventory items only; return to the Customer Sales Detail Information screen, SAL320D-01 to view special lines and freight.

- The system computes the margin as: Sales - Cost = Margin

- The system computes the margin/unit as: $\text{Margin} / \text{Units} = \text{Margin/Unit}$

The fields on the first three lines of the screen are identical for all customer inquiry screens. See the information for Customer Sales Detail Information, SAL320D-01, for these field descriptions.

Field descriptions - SAL320D-02

Fields	Description
Summary Fields:	This screen has the following fields: <ul style="list-style-type: none"> ■ Units. This is the number of units sold to this customer. ■ <Weight>. For DWM items, this is the weight. ■ Sales. This is the monetary amount of sales to this customer. ■ Cost. This is the cost to the company. ■ Margin. This is the total margin for this item group, calculated as $\text{Sales} - \text{Cost} = \text{Margin}$. ■ Margin/Unit. This is the profit margin per unit sold of this item, calculated as $\text{Margin/Units} = \text{Margin/Unit}$.

Screen actions - SAL320D-02

Commands	Description
F16=Items	<p>Access the Customer Sales Item Detail screen, SAL320D-03 and Customer Sales Class Detail, SAL320D-04. For each item, these screens display month-to-date and year-to-date values for sales units (quantity), sales amount (monetary), and sales cost.</p> <p>For DWM items, they display the value equivalent to the units expressed in the DWM dual unit of measure <Wght>.</p>
F17=Documents	<p>Access the Customer Sales Invoice History screen, SAL320D-05. This screen displays the following data, sorted by originating prefix and document number: the corresponding order number, document date, document type, total document amount, document cost, and document margin. When you fold this screen, Infor LX displays the salesperson number and name as well as the customer purchase order number.</p>
F18=Orders	<p>Access the Customer Sales Order History screen, SAL320D-06. This screen displays the following data, sorted by order number: originating prefix and</p>

document number, document date, document type, total document amount (monetary), document cost, and document margin.

F20=Shipments

Access the Customer Sales Shipment Detail screen, SAL320D-07. This screen displays the following information for each item: the order number, ship date, warehouse/location, ship quantity, and ship amount (monetary). When you fold this screen, Infor LX displays the item description and the lot number, if the item is lot controlled.

For DWM items, the screen also displays the DWM dual unit of measure value <Weight> that corresponds to the ship quantity.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 14)* in the overview information in this document.

View customer sales details, by item or class

Use F16 from the Customer Sales Detail Information screen, SAL320D-01, to access Customer Sales Item Detail, SAL320D-03. Use F19 from this screen to display the Customer Sales Class Detail screen, SAL320D-04.

The fields on the first three lines of the screen are identical for all customer inquiry screens. See the information for the Customer Sales Detail Information screen, SAL320D-01, for these field descriptions.

Field descriptions - SAL320D-03 and SAL320D-04

Fields	Description
Sales information:	For each item or class, the center of this screen displays month-to-date and year-to-date values for sales units (quantity), sales amount (monetary), and sales cost. For DWM items, the system displays the MTD and YTD values with the DWM dual unit of measure equivalents in the MTD <Wght> and YTD <Wght> fields.

Screen actions - SAL320D-03 and SAL320D-04

Commands	Description
F14=Summary	Access the Customer Sales Summary screen, SAL320D-02. This screen displays month-to-date and year-to-date values for this customer's units sold (quantity), sales (monetary), cost, margin, and margin per unit, and, for DWM items, the value equivalent to the units expressed in the DWM dual unit of

measure <Wght>. Month-to-date and year-to-date sales for the summary screen include inventory items only; return to the detail screen to include special lines and freight.

F15=Detail

Return to the Customer Sales Detail Information screen, SAL320D-01.

F17=Documents

Access the Customer Sales Invoice History screen, SAL320D-05. This screen displays the following data, sorted by originating prefix and document number: the corresponding order number, document date, document type, total document amount, document cost, and document margin. If you fold this screen, Infor LX displays the salesperson number and name and the customer purchase order number.

F18=Orders

Access the Customer Sales Order History screen, SAL320D-06. This screen displays the following data, sorted by order number: originating prefix and document number, document date, document type, total document amount (monetary), document cost, and document margin.

F19= Switch

Switch back and forth between the Customer Sales Item Detail screen, SAL320D-03, and the Customer Sales Class Detail screen, SAL320D-04. The Customer Sales Item Detail screen displays the following data, sorted by item class: the month-to-date and year-to-date values for sales units (quantity), sales amount (monetary), and sales cost.

If you fold the screen for DWM items, Infor LX displays the DWM dual unit of measure equivalents in the MTD <Wght> and YTD <Wght> fields.

F20=Shipments

Access the Customer Sales Shipment Detail screen, SAL320D-07. This screen displays the following information for each item: the order number, ship date, warehouse/location, ship quantity, and ship amount (monetary). If you fold this screen, Infor LX displays the item description and the lot number, if the item is lot controlled.

For DWM items, the screen also displays the DWM dual unit of measure value <Weight> corresponding to the ship quantity.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 14)* in the overview information in this document.

View customer sales, by document number

Use the Customer Sales Invoice History screen, SAL320D-05, to display information about a customer's sales, sorted by document. You can fold the screen below to show additional information.

The fields on the first three lines of the screen are identical for all customer inquiry screens. See the information for the Customer Sales Detail Information screen, SAL320D-01, for these field descriptions.

The system displays the following additional fields:

- Customer: Infor LX displays a list of the sold-to customers associated with the selected sales history customer.
- Prefix: Infor LX displays the invoice prefix for each sold-to customer.
- Org Doc: Infor LX displays the original document (invoice) number for each sold-to customer.
- Order: Infor LX displays the order number for each sold-to customer.
- Doc Date: Infor LX displays the invoice date for each sold-to customer.
- Type: Infor LX displays the invoice type for each sold-to customer.
- Total Doc Amount: Infor LX displays the total monetary amount listed on the invoice for each sold-to customer.
- Document Cost: Infor LX displays the invoice cost for each sold-to customer.

Field descriptions - SAL320D-05

Fields	Description
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Document Information:	In the center of this screen Infor LX displays the following data by document number:
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- Corresponding order number
- Document date
- Document type
- Total document amount (monetary)
- Document cost
- Document margin

Screen actions - SAL320D-05

Commands	Description
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F11=Fold	Display additional fields. Infor LX displays the salesperson number and name, the customer purchase order number, and the assigned prefix and document number.
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F14=Summary	Access Customer Sales Summary, SAL320D-02. This screen displays month-to-date and year-to-date values for this customer's units sold (quantity), sales (monetary), cost, margin, and margin per unit, and, for DWM items, the value equivalent to the units expressed in the DWM dual unit of measure <Wght>. Month-to-date and year-to-date sales for the summary screen include inventory items only; return to the detail screen to include special lines and freight.
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F15=Detail	Return to the Customer Sales Detail Information screen, SAL320D-01.
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F16=Items Access the Customer Sales Item Detail screen, SAL320D-03, and the Customer Sales Class Detail screen, SAL320D-04. For each item, these screens display month-to-date and year-to-date values for sales units (quantity), sales amount (monetary), and sales cost.

F18=Orders Access Customer Sales Order History, SAL320D-06. This screen displays the following data, sorted by order number: originating prefix and document number, document date, document type, total document amount (monetary), document cost, and document margin.

F20=Shipments Access the Customer Sales Shipment Detail screen, SAL320D-07. This screen displays the following information for each item: the order number, ship date, warehouse/location, ship quantity, and ship amount (monetary). If you fold this screen, Infor LX displays the item description and the lot number, if the item is lot controlled.

For DWM items, the screen also displays the DWM dual unit of measure value <Weight> that corresponds to the ship quantity.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 14)* in the overview information in this document.

View customer sales details, by order

Use the Customer Sales Order History screen, SAL320D-06, to display information about a customer's sales, sorted by order number. Fold the screen to show additional information.

The fields on the first three lines of the screen are identical for all customer inquiry screens. See the information for the Customer Sales Detail Information screen, SAL320D-01, for these field descriptions.

The system displays the following additional fields:

- Customer. Infor LX displays a list of the sold-to customers associated with the selected sales history customer.
- Prefix. Infor LX displays the customer order prefix for each sold-to customer.
- Org Doc. Infor LX displays the original document (invoice) number for each sold-to customer.
- Order. Infor LX displays the order number for each sold-to customer.
- Doc Date. Infor LX displays the customer order date for each sold-to customer.
- Type. Infor LX displays the customer order type for each sold-to customer.
- Total Doc Amount. Infor LX displays the total monetary amount listed on the customer order for each sold-to customer.
- Document Cost. Infor LX displays the customer order cost for each sold-to customer.

Screen actions - SAL320D-06

Commands	Description
F11=Fold	Display additional fields. Infor LX displays the salesperson number and name and the customer purchase order number.
F14=Summary	Access the Customer Sales Summary screen, SAL320D-02. This screen displays month-to-date and year-to-date values for this customer's units sold (quantity), sales (monetary), cost, margin, and margin per unit, and, for DWM items, the value equivalent to the units expressed in the DWM dual unit of measure <Wght>. Month-to-date and year-to-date sales for the summary screen include inventory items only; return to the detail screen to include special lines and freight.
F15=Detail	Return to the Customer Sales Detail Information screen, SAL320D-01.
F16=Items	<p>Access the Customer Sales Item Detail screen, SAL320D-03 and the Customer Sales Class Detail screen, SAL320D-04. For each item, these screens display month-to-date and year-to-date values for sales units (quantity), sales amount (monetary), and sales cost.</p> <p>For DWM items, the screens display the value equivalent to the units expressed in the DWM dual unit of measure <Wght>.</p>
F17=Documents	Access the Customer Sales Invoice History screen, SAL320D-05. This screen displays the following data, sorted by originating prefix and document number: the corresponding order number, document date, document type, total document amount, document cost, and document margin. If you fold this screen, Infor LX displays the salesperson number and name and the customer purchase order number.
F20=Shipments	<p>Access the Customer Sales Shipment Detail screen, SAL320D-07. This screen displays the following information for each item: the order number, ship date, warehouse/location, ship quantity, and ship amount (monetary). If you fold this screen, Infor LX displays the item description and the lot number, if the item is lot controlled.</p> <p>For DWM items, the screen also displays the DWM dual unit of measure value <Weight> corresponding to the ship quantity.</p> <p>All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

View customer sales details, by shipments

Use the Customer Sales Shipments Detail screen, SAL320D-07, to display information about a customer's sales, sorted by shipment number. Fold the screen to show additional information.

The fields on the first three lines of the screen are identical for all customer inquiry screens. See the information for the Customer Sales Detail Information screen, SAL320D-01, for these field descriptions.

The system displays the following additional fields:

- Customer. Infor LX displays a list of the sold-to customers associated with the selected sales history customer.
- Item. Infor LX displays a list of the items shipped on orders for the sold-to customer.
- Order. Infor LX displays the order number for each item.
- Ship Date. Infor LX displays the ship date for each item.
- Warehouse. Infor LX displays the ship-from warehouse for each item.
- Location. Infor LX displays the warehouse location for each item.
- Ship Qty. Infor LX displays the quantity of the item that was shipped for each order. For DWM items, it also displays the value equivalent to the Ship Qty in the DWM dual unit of measure <Weight>.
- Ship Amount. Infor LX displays the monetary amount of each shipment.

Screen actions - SAL320D-07

Commands	Description
F11=Fold	Display additional fields. Infor LX displays the item description and the lot number if the item is lot controlled. If this is a DWM item, Infor LX displays the ship quantity expressed in the DWM dual unit of measure <Weight>.
F14=Summary	Access the Customer Sales Summary screen, SAL320D-02. This screen displays month-to-date and year-to-date values for this customer's units sold (quantity), sales (monetary), cost, margin, and margin per unit, and, for DWM items, the value equivalent to the units expressed in the DWM dual unit of measure <Wght>. Month-to-date and year-to-date sales for the summary screen include inventory items only; return to the detail screen to include special lines and freight.
F15=Detail	Return to the Customer Sales Detail Information screen, SAL320D-01.
F16=Items	Access the Customer Sales Item Detail screen, SAL320D-03 and the Customer Sales Class Detail screen, SAL320D-04. For each item, these screens display month-to-date and year-to-date values for sales units (quantity), sales amount (monetary), and sales cost.

For DWM items, the screens display the value equivalent to the units expressed in the DWM dual unit of measure <Wght>.

F17=Documents

Access the Customer Sales Invoice History screen, SAL320D-05. This screen displays the following data, sorted by originating prefix and document number: the corresponding order number, document date, document type, total document amount, document cost, and document margin. If you fold this screen, Infor LX displays the salesperson number and name and the customer purchase order number.

F18=Orders

Access the Customer Sales Order History screen, SAL320D-06. This screen displays the following data, sorted by order number: originating prefix and document number, document date, document type, total document amount (monetary), document cost, and document margin.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 14)* in the overview information in this document.

View item sales

If you specify an item name or item number on the Sales Inquiry Selection screen, SAL300D-01, and press Enter, Infor LX displays the Item Sales Information screen, SAL340D-01. You can view summary information about item sales on this screen.

The system displays the following fields:

- Item number.
- Item description.
- Item Class and description.
- Item type code.
- Unit/Meas. This is the stocking unit of measure for this item.
- MTD Sales. This is the current month-to-date monetary sales amount for this item
- YTD Sales. This is the year-to-date monetary sales amount for this item.

Note: This includes only months in the current fiscal year.

The remainder of the screen summarizes the following month-to-date and year-to-date information:

- Units. This is the number of units sold, in stocking unit of measure.
- <Weight>. For DWM items, this is the value equivalent to the quantity in the DWM dual unit of measure.
- Sales. This is the monetary amount of sales of this item.
- Cost. This is the cost to the company of this item
- Margin. This is the total margin for this item group, calculated as Sales - Cost = Margin.

- **Margin/Unit.** This is the profit margin per unit sold of this item, calculated as $\text{Margin/Units} = \text{Margin/Unit}$.

Note: Sales figures by salesperson include freight charges on detail screens. The Sales History Inquiry, summary screen, excludes freight charges.

Screen actions - SAL340D-01

Commands	Description
F19=Customers	<p>Access the Item Sales Customer Detail screen, SAL340D-02, which displays the following data, sorted in customer number sequence: the customer name, month-to-date and year-to-date sales units, sales amount (monetary), and sales cost.</p> <p>For DWM items, the screen also displays the DWM dual unit of measure equivalents in the MTD <Wght> and YTD <Wght> fields.</p>
F20=Shipments	<p>Access the Item Sales Shipments Detail screen, SAL340D-03, which displays the following information: the customer number and order number, the ship date, warehouse/location, ship quantity, and ship amount (monetary).</p> <p>All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

View item sales, by customer

Use the Item Sales Customer Detail screen, SAL340D-02 to display items sales information sorted by customer.

The fields on the first three lines of the screen are identical for all item inquiry screens. See the information for the Item Sales Information screen, SAL340D-01, for these field descriptions.

The fields in the center of the screen include the customer name, month-to-date sales units, sales amount (monetary), and sales cost (monetary) followed by another line with the customer's name and the year-to-date sales units, sales amount (monetary), and sales cost (monetary).

For DWM items, the screen also displays the DWM dual unit of measure equivalents in the MTD <Wght> and YTD <Wght> fields.

Screen actions - SAL340D-02

Commands	Description
F14=Summary	Return to the Item Sales Information screen, SAL340D-01.
F20=Shipments	<p>Access the Item Sales Shipments Detail screen, SAL340D-03, which displays the following information: the customer number and order number, the ship date, warehouse/location, ship quantity, and ship amount (monetary).</p> <p>All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

View item sales, by shipment

Use the Item Sales Shipments Detail screen, SAL340D-03, to view information about item sales, sorted by shipment.

The fields on the first three lines of the screen are identical for all item inquiry screens. See the information for the Item Sales Information screen, SAL340D-01, for these field descriptions.

Field descriptions - - SAL340D-03

Fields	Description
Shipment information:	The system displays the following information for each shipment for this item: the customer number and order number, the ship date, warehouse/location, ship quantity, and ship amount (monetary).

Screen actions - SAL340D-03

Commands	Description
F4=Prompt	Display a window with a graph that shows MTD sales by salesperson.
F11=Fold	<p>Display additional fields. If you fold this screen, Infor LX displays customer name, lot number, if the item is lot-controlled, and the promotion number, if a promotion exists. The system displays a Y in the Promotion field if a promotion applies to the order line.</p> <p>For DWM items, the folded screen also displays the value equivalent to the ship quantity in the DWM dual unit of measure.</p>

F14=Summary

Return to the Item Sales Detail Summary screen, SAL340D-01.

F19=Customers

Access the Item Sales Customer Detail screen, SAL340D-02, which displays the following data, sorted in customer number sequence: the customer name, month-to-date and year-to-date sales units, sales amount (monetary), and sales cost.

For DWM items, the screen displays the DWM dual unit of measure equivalents in the MTD <Wght> and YTD <Wght> fields.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 14)* in the overview information in this document.

View salesperson sales

If you specify a salesperson's number or name on the Sales Inquiry Selection screen, SAL300D-01, and press Enter, Infor LX displays the Salesperson Sales Detail Information screen, SAL350D-01. You can view details about a salesperson's sales by month.

The system repeats the following fields on all of the salesperson inquiry screens:

- Salesperson number and name.
- MTD Sales. the current month-to-date monetary sales amount for this salesperson.
- YTD Sales. the current year-to-date monetary sales amount for this salesperson. This includes only the months in the current fiscal year.
- Last YTD Sales. the last year-to-date monetary sales amount for this salesperson, for the same period as this year.

The system displays the following fields on the Sales Inquiry Selection screen, SAL300D-01:

- Sales MTD: This is the salesperson's month-to-date monetary amount of sales for the current month and for each of the previous 12 months.
- Average Sales. This is the salesperson's average sales per month, for the past 13 months, calculated as: $(\text{Current sales MTD} + \text{previous 12 months' sales}) / 13$.
- PCT of Total. This column displays the percentage of the thirteen-month sales total that the amount to the left represents.

Note: Sales figures by salesperson include freight charges on detail screens. The Sales History Inquiry summary screen excludes freight charges.

Screen actions - SAL350D-01

Commands	Description
F14=Summary	Access the Salesperson Sales Summary screen, SAL350D-02, which displays month-to-date and year-to-date values for units sold (quantity), sales (monetary), cost, margin, and margin per unit.
F16=Items	Access the Salesperson Sales Item Detail screen, SAL350D-03. You can access the Salesperson Sales Class Detail screen, SAL350D-04, from this screen with F19. For each item, these screens display month-to-date and year-to-date values for sales units (quantity), sales amount (monetary), and sales cost.
F17=Documents	Access the Salesperson Sales Invoice History screen, SAL350D-05, which displays the following data by originating prefix and document number: the corresponding order number, document date, document type, total document amount (monetary), document cost, and document margin. If you fold this screen, Infor LX displays the salesperson number and name and the customer purchase order number.
F18=Orders	<p>Access the Salesperson Sales Order History screen, SAL350D-06, which displays the following data, by order number: document number, document date, document type, total document amount (monetary), document cost, and document margin.</p> <p>All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

View salesperson sales summary

Use the Salesperson Sales Summary screen, SAL350D-02, to view month-to-date and year-to-date summary information about a salesperson's sales.

The fields on the first four lines of the screen are identical for all salesperson inquiry programs. See the field descriptions for the Salesperson Sales Detail Information screen.

The system displays the following on this screen:

- Units sold. This is the Month-To-Date and Year-To-Date number of units sold.
- Sales amount (monetary). This is the Month-To-Date and Year-To-Date monetary amount of sales.
- Cost. This is the Month-To-Date and Year-To-Date
- Margin. Month-To-Date and Year-To-Date
- Margin/Unit. Month-To-Date and Year-To-Date

Screen actions - SAL350D-02

Commands	Description
F15=Detail	Return to the Salesperson Sales Detail Information screen, SAL350D-01.
F16=Items	Access the Salesperson Sales Item Detail screen, SAL350D-03. You can access Salesperson Sales Class Detail, SAL350D-04 from this screen with F19. For each item, these screens display month-to-date and year-to-date values for sales units (quantity), sales amount (monetary), and sales cost.
F17=Documents	Access the Salesperson Sales Invoice History screen, SAL350D-05, which displays the following data by originating prefix and document number: the corresponding order number, document date, document type, total document amount (monetary), document cost, and document margin. When you fold this screen, Infor LX displays the salesperson number and name and the customer purchase order number.
F18=Orders	<p>Access the Salesperson Sales Order History screen, SAL350D-06, which displays the following data, by order number: document number, document date, document type, total document amount (monetary), document cost, and document margin.</p> <p>All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

View salesperson sales, by item

Use the Salesperson Sales Item Detail screen, SAL350D-03, to view month-to-date and year-to-date summary information about a salesperson's sales, sorted by item.

The fields on the first four lines of the screen are identical for all salesperson inquiry programs. See the field descriptions for the Salesperson Sales Detail Information screen.

The system displays the following information on this screen for each item sold:

- Item number and description
- Sales units. This is the number of units of the item sold, Month-To-Date and Year-To-Date.
- Sales Amount. This is the monetary value of the units sold, Month-To-Date and Year-To-Date.
- Sales Cost

Screen actions - SAL350D-03

Commands	Description
F14=Summary	Access the Salesperson Sales Summary screen, SAL350D-02, which displays month-to-date and year-to-date values for units sold (quantity), sales (monetary), cost, margin, and margin per unit.
F15=Detail	Access the Salesperson Sales Detail Information screen, SAL350D-01.
F17=Documents	Access the Salesperson Sales Invoice History screen, SAL350D-05, which displays the following data by originating prefix and document number: the corresponding order number, document date, document type, total document amount (monetary), document cost, and document margin. If you fold this screen, Infor LX displays the salesperson number and name and the customer purchase order number.
F18=Orders	Access the Salesperson Sales Order History screen, SAL350D-06, which displays the following data, by order number: document number, document date, document type, total document amount (monetary), document cost, and document margin.
F19=Switch	<p>Access the Salesperson Sales Detail Information by Class screen, SAL350D-04, which displays the class number and description with the month-to-date and year-to-date sales units, sales amount (monetary), and sales cost (monetary) for each class of items sold.</p> <p>All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

View salesperson sales, by class

Use the Salesperson Sales Class Detail screen, SAL350D-04, to view month-to-date and year-to-date summary information about a salesperson's sales, sorted by class.

The fields on the first four lines of the screen are identical for all salesperson inquiry programs. See the field descriptions for the Salesperson Sales Detail Information screen.

The system displays the following information on this screen for each item sold:

- Item class and description
- Sales units. This is the number of units of the item sold, Month-To-Date and Year-To-Date.
- Sales Amount. This is the monetary value of the units sold, Month-To-Date and Year-To-Date.
- Sales Cost

Screen actions - SAL350D-04

Commands	Description
F14=Summary	Access the Salesperson Sales Summary screen, SAL350D-02, which displays month-to-date and year-to-date values for units sold (quantity), sales (monetary), cost, margin, and margin per unit.
F15=Detail	Access the Salesperson Sales Detail Information screen, SAL350D-01.
F18=Orders	Access the Salesperson Sales Order History screen, SAL350D-06, which displays the following data, by order number: document number, document date, document type, total document amount (monetary), document cost, and document margin.
F19=Switch	Access the Salesperson Sales Item Detail screen, SAL350D-03, which displays the class number and description with the month-to-date and year-to-date sales units, sales amount (monetary), and sales cost (monetary) for each class of items sold.
F17=Documents	<p>Display the Salesperson Sales Invoice History screen, SAL350D-05. This screen displays the following data by originating prefix and document number: the corresponding order number, document date, document type, total document amount (monetary), document cost, and document margin. If you fold this screen, Infor LX displays the salesperson number and name and the customer purchase order number.</p> <p>All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

View salesperson sales, by document number

Use the Salesperson Sales Invoice History screen, SAL350D-05, to view information about a salesperson's sales, sorted by document number.

The system displays the following information by originating prefix and document number: the corresponding order number, document date, document type, total document amount (monetary), document cost, and document margin.

The fields on the first four lines of the screen are identical for all salesperson inquiry programs. See the field descriptions for the Salesperson Sales Detail Information screen.

Additional fields on Salesperson Sales Invoice History, SAL350D-05, are as follows.

- Customer. Infor LX displays a list of the sold-to customers associated with the selected salesperson.

- Prefix. Infor LX displays the invoice prefix for each sold-to customer.
- Org Doc. Infor LX displays the original document (invoice) number for each sold-to customer.
- Order. Infor LX displays the order number for each sold-to customer.
- Doc Date. Infor LX displays the invoice date for each sold-to customer.
- Type. Infor LX displays the invoice type for each sold-to customer.
- Total Doc Amount. Infor LX displays the total monetary amount listed on the invoice for each sold-to customer.
- Document Cost. Infor LX displays the document (invoice) cost for each sold-to customer.

Screen actions - SAL350D-05

Commands	Description
F11=Fold	Display additional fields. If you fold this screen, Infor LX displays the customer number and name, the customer purchase order number, and the document margin.
F14=Summary	Access the Salesperson Sales Summary screen, SAL350D-02, which displays month-to-date and year-to-date values for units sold (quantity), sales (monetary), cost, margin, and margin per unit.
F15=Detail	Access the Salesperson Sales Detail Information screen, SAL350D-01.
F16=Items	Access the Salesperson Sales Item Detail screen, SAL350D-03. You can access Salesperson Sales Class Detail, SAL350D-04 from this screen with F19. For each item, these screens display month-to-date and year-to-date values for sales units (quantity), sales amount (monetary), and sales cost.
F18=Orders	<p>Access the Salesperson Sales Order History screen, SAL350D-06, which displays the following data, by order number: document number, document date, document type, total document amount (monetary), document cost, and document margin.</p> <p>All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

View salesperson sales, by order number

Use the Salesperson Sales Order History screen, SAL350D-06, to view information about a salesperson's sales, sorted by order number.

The fields on the first four lines of the screen are identical for all salesperson inquiry programs. See the field descriptions for the Salesperson Sales Detail Information screen.

Additional fields on Salesperson Sales Invoice History, SAL350D-05, are as follows.

- Customer. Infor LX displays a list of the sold-to customers associated with the selected salesperson.
- Prefix. Infor LX displays the order prefix for each sold-to customer.
- Org Doc. Infor LX displays the original document (invoice) number for each sold-to customer.
- Order. Infor LX displays the order number for each sold-to customer.
- Doc Date. Infor LX displays the order date for each sold-to customer.
- Type. Infor LX displays the order type for each sold-to customer.
- Total Doc Amount. Infor LX displays the total monetary amount listed on the order for each sold-to customer.
- Document Cost. Infor LX displays the document (invoice) cost for each sold-to customer.

Field descriptions - SAL350D-06

Fields	Description
Order information:	<p>In the center of the screen, Infor LX displays the following information in order number sequence for each order:</p> <ul style="list-style-type: none"> ■ Order Number and Type ■ Document Number and Date ■ Total Document Amount ■ Document Cost

Screen actions - SAL350D-06

Commands	Description
F11=Fold	Display additional fields. Infor LX displays the Customer Number and Name associated with the order.
F14=Summary	Access the Salesperson Sales Summary screen, SAL350D-02, which displays month-to-date and year-to-date values for units sold (quantity), sales (monetary), cost, margin, and margin per unit.
F15=Detail	Access the Salesperson Sales Detail Information screen, SAL350D-01.
F16=Items	Access the Salesperson Sales Item Detail screen, SAL350D-03. You can access Salesperson Sales Class Detail, SAL350D-04 from this screen with

F19. For each item, these screens display month-to-date and year-to-date values for sales units (quantity), sales amount (monetary), and sales cost.

F17=Documents

Access the Salesperson Sales Invoice History screen, SAL350D-05, which displays the following data by originating prefix and document number: the corresponding order number, document date, document type, total document amount (monetary), document cost, and document margin. If you fold this screen, Infor LX displays the salesperson number and name and the customer purchase order number.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 14)* in the overview information in this document.

View warehouse sales

Use the Warehouse Sales Information screen, SAL360D-01, to view information that summarizes month-to-date and year-to-date sales.

The fields on the Warehouse Sales Information screen are as follows.

- Warehouse Code and Name. This field displays the warehouse whose sales information appears on the screen.
- MTD Sales. This field displays the current month-to-date monetary sales amount from this warehouse.
- YTD Sales. This field displays the current year-to-date monetary sales amount from this warehouse. This includes only the months in the current fiscal year.
- Last YTD Sales. This field displays the last year's year-to-date monetary sales amount from this warehouse, for the same period as this year.
- Sales MTD. The fields in this column display the month-to-date monetary amount of sales from this warehouse for the current month and each of the previous 12 months.
- PCT of Total. This fields in this column displays the percentage of the thirteen-month sales total that the amount to the left represents.
- Average Sales. This field displays the salesperson's average sales per month, for the 13 months, calculated as (Current sales MTD + previous 12 months' sales)/13.

Screen actions - SAL360D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Specify group sales analysis code

Use the Group Sales Analysis Inquiry window, WNGPRD, to limit the selection of data displayed on Group Sales Analysis screens, SAL305, to the Customer Group Sales Analysis and Item Group Sales Analysis codes that you select.

You use System Parameters Maintenance, SAL820D-01, to define the item and customer group sales field headings and their codes that the system uses here.

Field descriptions - WINGRPD

Fields	Description
XXXX1 through XXXX5 (5,A):	In place of XXXXn, Infor LX displays the Customer Group Sales Analysis field headings defined in System Parameters Maintenance, SAL820D-01. Specify a Customer Group Sales Analysis code for one of the categories.
YYYY1 through YYYY5 (5,A):	In place of YYYYn, Infor LX displays the Item Group Sales Analysis field headings defined in System Parameters Maintenance, SAL820D-01. Specify an Item Group Sales Analysis code for one of the categories.

Screen actions - WINGRPD

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Month to Date Sales, SAL301D

This screen provides a graphic representation of month-to-date sales by salesperson or by customer. The system displays the data with both a bar graph and numeric values.

The system displays the sales information with the most current month's data first.

Access: Use F4 from SAL320D-01, Customer Sales Detail Information, or, use F4 from SAL350D-01, Salesperson Sales Detail Information.

View month to date sales

Use Month to Date Sales, SAL301D, to see a graph that shows the month-to-date sales.

Screen actions - SAL301D

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Group Sales Analysis Inquiry

This program displays month-to-date and year-to-date sales information for the Item Group Sales Analysis and Customer Group Sales Analysis categories you defined in IDF Enterprise Item, and IDF Customer. Define the headings for the categories in System Parameters Generation, SAL820D-01.

Access: Use F19 from Sales History, SAL300D-01.

View group sales information

Use the Group Sales Analysis screen, SAL305D-01, to view summary information about the sales for the groups you selected.

Field descriptions - SAL305D-01

Fields	Description
SCRf1 through SCRf5 (5,X):	<p>In place of SCRfN, Infor LX displays the customer group sales analysis and item group sales analysis field headings that you defined in System Parameters Generation, SAL820D-01, followed by the values you specified on the Group Sales Analysis Inquiry window.</p> <p>Infor LX displays the following month-to-date and year-to-date totals:</p> <ul style="list-style-type: none"> ■ Number of units sold, in stocking unit of measure ■ Sales amount, in base currency ■ Item cost, in base currency ■ Margin ■ Margin/Unit
SIRf1 through SIRf5 (5,X):	<p>In place of SIRfN, Infor LX displays the customer group sales analysis and item group sales analysis field headings you defined in System Parameters Generation, SAL820D-01, followed by the values you selected on the Group Sales Analysis Inquiry window.</p> <p>Infor LX displays the following month-to-date and year-to-date totals:</p> <ul style="list-style-type: none"> ■ Number of units sold, in stocking unit of measure ■ Sales amount, in base currency ■ Item cost, in base currency ■ Margin ■ Margin/Unit

Screen actions - SAL305D-01

Commands	Description
F14	Display the Group Sales Analysis Detail screen, SAL305D-02.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 14)* in the overview information in this document.

View detailed group sales information

Use the second Group Sales Analysis screen, SAL305D-02, to view details about the sales for the groups you selected.

Field descriptions - SAL305D-02

Fields	Description
SCRF1 through SCRF5 (5,X):	<p>In place of SCRFn and SIRFn, Infor LX displays the customer group sales analysis and item group sales analysis field headings you defined in System Parameters Generation, SAL820D-01, followed by the values you selected on the Group Sales Analysis Inquiry window.</p> <p>Infor LX displays month-to-date totals for the following fields, along with separate detail for each of the preceding twelve months and an average for that twelve month period:</p> <ul style="list-style-type: none"> ■ Number of units sold, in stocking unit of measure ■ Sales amount, in base currency ■ Item cost, in base currency ■ Margin ■ Margin Percent
SIRF1 through SIRF5 (5,X):	<p>In place of SCRFn and SIRFn, Infor LX displays the customer group sales analysis and item group sales analysis field headings you defined in System Parameters Generation, SAL820D-01, followed by the values you selected on the Group Sales Analysis Inquiry window.</p> <p>Infor LX displays month-to-date totals for the following fields, along with separate detail for each of the preceding twelve months and an average for that twelve month period:</p> <ul style="list-style-type: none"> ■ Number of units sold, in stocking unit of measure ■ Sales amount, in base currency ■ Item cost, in base currency ■ Margin ■ Margin Percent

Screen actions - SAL305D-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Salesperson Alpha Lookup, SAL310D

Use Salesperson Alpha Lookup, SAL310D, to display information from the Salesperson Master file. The information includes the salesperson's name, number, telephone number, and address.

If you access this program from another program, for example, Sales History, SAL300, you can use the Select option to transfer salesperson data back to the original program. The salesperson data is stored in the Salesperson Master file, SSM, and maintained through the Salesperson Master Maintenance program, SAL100.

Access: SAL menu, or use F15 from the Sales Inquiry Selection screen, SAL300D-01.

Specify a salesperson (SAL310D-01)

Specify information to look up a salesperson in the file.

Field descriptions - SAL310D-01

Fields	Description
Name (30,A):	Specify the name of the salesperson for whom you are searching. After you press Enter, Infor LX displays the salesperson information beginning with the name you specified. Note: Infor LX searches for the first characters of the value you specify in the Salesperson Name field in the Salesperson Master Maintenance program, SAL100. For example, if you specified Bob Jones, put Bob in this name field, not Jones.
Select :	Specify X in the first column of the line that corresponds to the salesperson whose information you want to transfer to another program. This option only applies if you accessed this program from another program. Otherwise, you may only view the lines displayed on the screen.

Screen actions - SAL310D-01

Commands	Description
F11=Fold	<p>Display additional address fields for each salesperson. Use F11 again to return the display to one line for each salesperson.</p> <p>All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

Invoiced Purchase Orders, SAL315D

Invoiced Purchase Orders, SAL315, displays information about purchase orders. The system displays the invoices that resulted from customer orders that filled the purchase orders. The system displays the information sorted by invoice number, and then by order numbers. The information includes the invoiced amount, invoice cost, and the invoice margin.

Access: SAL menu

Specify the purchase order

Specify the purchase order for which you want history. You must specify both the customer number and the customer purchase order.

Field descriptions - SAL315D-01

Fields	Description
Customer Number (8,0):	Specify the number of the customer whose purchase orders you want to view.
Customer Purchase Order (23,A):	Specify the customer's purchase order number.

Screen actions - SAL315D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

View purchase order

Use the Customer Purchase Order History Inquiry screen, SAL315D-02, to view information about a specific purchase order. The system displays the following fields:

- Customer number and name
- Customer purchase order number
- Order
- Document Date
- Type
- Document Amount
- Document Cost
- Salesperson

Screen actions - SAL315D-02

Commands	Description
F11=Fold	Fold the screen and display the salesperson name and number. Use F11 again to return the screen to the original format. All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Commission Generation, SAL600D

Use Commission Generation, SAL600D, to calculate commissions. The Pay Commission upon Payment parameter on the Commission Processing Parameters screen, SAL821D-01, determines which orders to include in the commission generation. The commission system parameters indicate whether to pay commissions when you invoice orders, or when the customer pays the invoice in full.

After the system determines which invoices are eligible for commission generation, the system applies the appropriate commission rate. The system retrieves the commission rate from the commission rates

file, SCR, which you maintain in Commission Rates Maintenance, SAL120. The commission rate applied to the invoice depends on the customer, item, and salesperson commission codes found on the order header. If none of these commission codes exist on the order header, the system pays no commissions on this invoice. However, the system does create a record with a 0 commission, which you can change later.

The system stores commissions generated by this program in the commission work file, SCW, until you update the Salesperson Master file in Commission Payment List/Update, SAL610. You can generate commissions as many times as you want until you run the Commission Payment List/Update program.

Access: SAL menu

Generate commissions

Use Commissions Generation, SAL600D-01, to generate commissions and decide whether to override the date for the exchange rate.

Field descriptions - SAL600D-01

Fields	Description
Do you want to generate commissions? (1,A):	Specify 1 to run the program and generate commissions. If you specify 0, the program does not run and you return to the Sales and Commission Analysis menu, SAL.
Override Date for Exchange Rate (6,0):	<p>You can specify a date to use to calculate the exchange rate for a commission, instead of the current date. The system uses the spot exchange rate on the date you specify to determine the commission. The system uses this rate to convert transaction currency amounts to base currency amounts. Infor LX pays commissions in the base currency, the currency of the company with which the salesperson is associated.</p> <p>If you leave this field blank, the system uses the current date to access the spot exchange rate.</p>

Screen actions - SAL600D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Commission Payment List/Update, SAL610D

Use Commission Payment List/Update, SAL610D, to generate reports of the commission payments that result after you run Commission Generation, SAL600D. At this point, the system does not update the commission files. You can print this listing, in summary or detail format, as many times as you want.

Only if you indicate Y in the first field (Y = List and Update File) does the system write the data in the sales commission work file, SCW, to the Salesperson Master file, SSM, and change the record ID from CW to CP in the Sales Commission Work file.

The report sorts by company, by salesperson number, and then by invoice number. The report shows the invoice amount in both transaction and base currencies. The report shows the commission amount only in base currency, the currency of the company with which the salesperson is associated. You pay the salesperson in the base currency.

The detail report contains the original document prefix and number, document line, date, customer number and name, document amount, commission amount, sales type, commission code, commission percent, item number, and order number. The summary report contains the original document prefix and number, date, customer number and name, document amount, and commission amount and sales and commission totals by salesperson.

Note: The system displays the prefix number only if you set the Company/Prefix Document Sequencing field in the Billing System Parameters to 1.

Access: SAL menu

Determine the features of the report

Specify whether you want a detailed or a summary report, whether you want to automatically update the master file after you generate the report, and whether you want to generate the report in batch or interactive mode.

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

 Field descriptions - SAL610D-01

Fields	Description
Commission Payment List/Update (1,A):	Specify Y to print the commission payment listing and update the Salesperson Master file, SSM. Specify N to print the listing but not update the file. Infor recommends that you specify N to create the report and review the report for accuracy and then use Y to run the report and update the Salesperson Master file.
Report in Detail (1,A):	Specify Y to print the listing in detail format. Specify N to print the listing in summary format.
Run Time Parameter (1,A):	Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - SAL610D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Commission Maintenance, SAL620D1

Use Commission Maintenance, SAL620D1, to view and change commission payment amounts. This program displays amounts in the Commission Work Record, SCW, that you generated with Commission Generation, SAL600D. When you are satisfied with the commission amount, save the amount to the Salesperson Master file, SSM, with Commission Payment List/Update, SAL610. You cannot alter a commission after you save the commission to the Salesperson Master file, SSM.

To update a commission payment, you must know the salesperson number and the invoice number on which the commission was paid. If you have set up your Commission System Parameters to pay commissions at the Line Level instead of the Header Level, you must also know the invoice line number on which the commission was paid. For more information, see System Parameters Generation, SYS800.

You can update the commission amounts only in the salesperson's company currency.

Access: SAL menu

Select a commission rate

Use the Commission Selection screen, SAL620D1-01, to specify which commission rate to view or change.

Field descriptions - SAL620D1-01

Fields	Description
Salesperson Number (6,0):	Specify the number of the salesperson whose commission amount to maintain.
Prefix (2,A):	Specify the prefix for the document on which the system calculated the commission. This system displays this field only if the Company/Prefix Document Sequencing field in the Billing System Parameters is 1.
Document Number (8,0):	Specify the document number on which the system calculated the commission.

Screen actions - SAL620D1-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Maintain a commission (SAL620D2-01)

After you select which salesperson and invoice to maintain, use Commission Maintenance, SAL620D2-01 to specify a new commission amount.

Most fields on this screen are display-only fields with information about this commission payment. You can only change the last field, Commission Amount. This screen displays the following information:

- Salesperson number and name
- Document Number
- Document Line Number
- Order Number/Line
- Company/Profit Center
- Customer Number/Name
- Salesperson Level
- Item Number

- Amount (Trans/Base). This is the amount of the invoice in the transaction currency, and then in the base currency, if the transaction and base currencies are different. The currency's three-letter abbreviation follows the amount.
- For a DWM item, Infor LX also displays information on how the system calculates the commission amount. The additional fields are the DWM dual unit of measure, the weight, and the Commission Rate per DWM U/M value from the Commission Rate file.
- Commission Percentage. This is the commission percentage, taken from the rate structure defined in Commission Rate Maintenance, SAL120. The system multiplies the invoice Amount (Trans/Base) by the Commission Percentage to calculate the commission Amount.
- Amount. This is the commission amount, in the salesperson's company currency.

Field descriptions - SAL620D2-01

Fields	Description
Salesperson Number	Infor LX displays the number of the salesperson whose commission amount you want to maintain.
Salesperson Name	Infor LX displays the name of the salesperson.
Prefix	Infor LX displays the prefix for the document on which the system calculated the commission. This field displays only if the Company/Prefix Document Sequencing field in the Billing System Parameters is 1.
Document Number	Infor LX displays the document number on which the system calculated the commission.
Document Type	Infor LX displays the type of document on which the system calculated the commission.
Document Line Number	Infor LX displays the line number of the document to maintain.
Document Year	Infor LX displays the last two digits of the year the document was created.
Order Number	Infor LX displays the order number on which the system calculates the commission.
Order Line Number	Infor LX displays the order line number.
Company	Infor LX displays the code of the salesperson's company.
Profit Center	Infor LX displays the code of the salesperson's profit center.
Customer Number	Infor LX displays the customer number from the order.

Customer Name	Infor LX displays the name of the customer.
Salesperson Level	Infor LX displays the level of the Salesperson: 1=Primary, 2=Secondary, 3=Tertiary.
Item Number	Infor LX displays the item number for the line on which the system calculated the commission.
Item Description	Infor LX displays the description of the item from the Item Master file.
Amount (Trans):	Infor LX displays the amount of the invoice in transaction currency, then in base currency, only if the transaction and base currencies are different. The currency's three-letter acronym follows the amount.
Amount (Base)	Infor LX displays the amount of the invoice in base currency, only if the transaction and base currencies are different. The currency's three-letter acronym follows the amount.
Commission Rate per DWM U/M	For DWM items, Infor LX displays the rate per DWM unit of measure from the Commission Rate file.
<Weight> (DWM Unit of Measure value)	For DWM items, Infor LX displays the value on the commission that was calculated from the invoice line in the DWM dual unit of measure <Weight>.
DWM Dual Measure Value	For DWM items, Infor LX displays the DWM unit of measure from the invoice line.
Commission Percentage:	Infor LX displays the commission percentage. The system applies the commission percentage to the base currency amount of the invoice, in the preceding field, to arrive at the Amount in the next field. The system gets the commission percentage from the rate structure defined in Commission Rate Maintenance, SAL120.
(Commission) Amount:	Infor LX displays the commission amount in the salesperson's company currency.
Commission Code for Customer:	Infor LX displays the commission code for the customer.
Commission Code for Item:	Infor LX displays the commission code for the item.
Commission Code for Slsprsn1:	Infor LX displays the commission code for salesperson 1.
Commission Code for Slsprsn2:	Infor LX displays the commission code for salesperson 2.

Commission Code for Slsprsn3: Infor LX displays the commission code for salesperson 3.

Commission Amount (15,2): If you want to change this commission payment, specify the new amount in this field. Note that this is a commission amount, and not a percentage.
You must enter the amount in the currency used by the salesperson's company. The system indicates this currency to the right of this field .

Screen actions - SAL620D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Appendix A

Glossary



Ranges

Ranges refer to fields you can use to limit an inquiry or report or to display specific data. If there are multiple range fields in a program, you can tailor your inquiry or report to produce only the data you need.

Infor LX sorts the information alphanumerically. Therefore, the value in the *From* field must be a lower alphanumeric value than the value in the *To* field.

Infor LX usually inserts extreme values as defaults in the lower and upper fields. See the description for Extreme values by default. The entries you make in range fields do not have to be valid values in a database file.

Review the following suggestions to limit the information:

Specify the first value to include on the inquiry or report in the *From* field. Leave the *To* field blank to include all information to the end of the file. For example, you can print a report that starts with the customer number you specify in the *From* field and stops at the end of the Customer Master file.

Specify the last value to include on the inquiry or report in the *To* field. Leave the *From* field blank to start at the beginning of the file. For example, you can perform an inquiry that starts with the beginning of the Customer Master file and ends with the customer number you specify in the *To* field.

Specify the same value in both the *From* and *To* fields. For example, you can limit a display to one customer.

To include a group of items, specify a value in the *From* field and another value in the *To* field. For example, you can perform an inquiry that starts with the first of the month and ends with the last day of the month.

Index

(Y/blank), 18

A/R, A/P, 19

Alphanumeric, 19

Extreme values by default, 18

Ranges, 18, 19, 81

Reference only, 18

system parameter, 24
