

Warehouse Utilities

- Uni-Select SAX Reporting Setup

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Installer Customer Maintenance

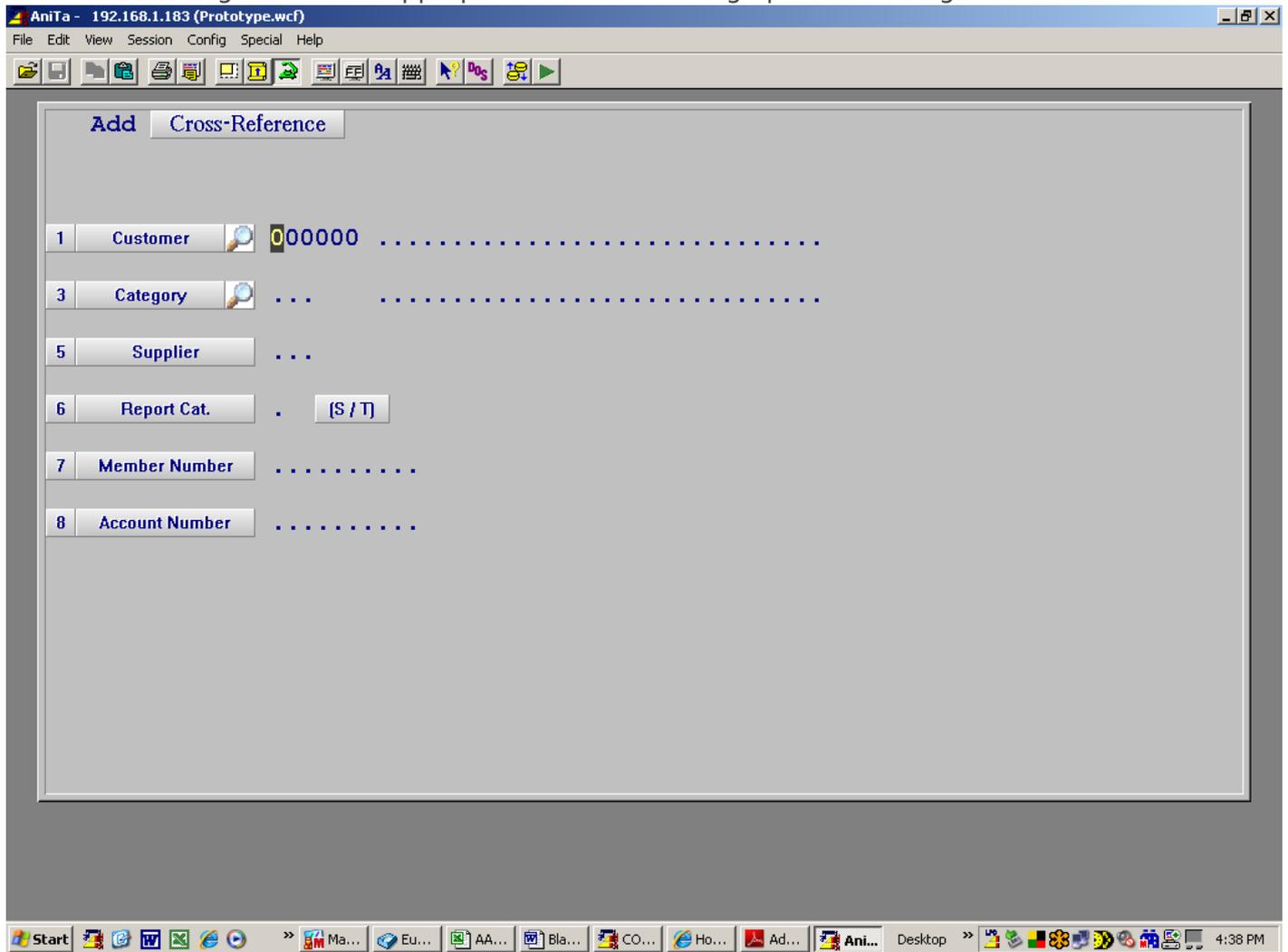
In order to provide the proper sales reporting for the SAX program some maintenance is required to identify the installers that have signed up for the program and which program they are enrolled in.

This new menu option is found via the following menu path. **Note** - This can only be initiated from the MAIN MENU.

Left Click the Uni-Select Logo on the button the the right of the Cursor at the bottom of the screen. From that menu take the following menu selections'

5. Uni-Select Installer Reporting... - -> 1. Installer Customer Maintenance

Select Add Change Delete as appropriate which will bring up the following screen.



Customer = Your A/R customer number for the installer

Category = Your category code for the product line. (This will automatically be converted to the Uni-Select supplier code when data is sent to Uni.)

An entry must be made for all product lines that are to be reported under the program for which installer reporting is being set up in this session. As you are making entries the fields will default to the previous entry made in that field

Report Cat. = **S** for SAX or **T** for the Specialist.

Member Number = Your Uni-Select member number in format 00-000.

Account Number = The Installers Uni-Select program account number

Installer Sales Reporting



The last selection determines which price the reported sales values are to be based on. The price levels shown for List and Jobber are controlled by the the setup of pricing structure in Billing Parameters Screen 1 field 41 for Jobber and List.

The Net option uses the price the items sold to the installer at, including any line discounts given at time of sale.