


Pricing is an important component to our business – set goals, and make plans to ensure a positive contribution

APPROVED SELLING FACTOR

All initial Approved Selling Factors uploaded to Salesforce Accounts. Guideline as follows;

- Account Manager (AM) or Sales Consultant can offer an addition 3% or less discount to a Quote / Order
- Greater than 3% and less than 5% requires Manager Approval for a Quote / Order
- Greater than 5% requires VP Sales Approval for a Quote / Order

If the factor on a Quote exceeds the Approval guideline a pop-up appears to Submit for Factor Approval

- In the Opportunity  SELECT – Change Selling Factor
- In the Pop-Up Box – Enter Factor and Reason
- Use Chatter on the Opportunity that has the Quote for any additional communication
- Manager and/or VP to Approve or Reject

SEE Sales Op Dashboard for Quotes Not Approved Report

NEW ACCOUNT SET UP

When setting up a New Account  Approved Selling Factor as follows;

B2B Dealer

- Requires Manager & VP Approval

B2B Direct

Volume Home Builder, Commercial and Manufactured Housing

- Requires Manager & VP Approval

Requires Approval if below;

- Custom Homebuilder | 27 Factor
- Contractor | 32 Factor

B2C Direct

Requires Approval if below;


- Consumer – Supply & Install | 38 Factor
- Consumer Supply | 32 Factor
- Consumer – New Home | 30 Factor

Enter your Selling Factor in Account set up – if Approval is required, an auto-email will be sent to the Approver.


FACTOR VARIANCE REPORTS

SEE Sales Performance | Accountability Dashboard

- Meet with your Manager to review your Monthly Factor Variance and YTD Factor Variance report
- Document new goals / actions – make plans for a positive variance

 Dashboard
Sales Performance | Accountability

ACCOUNT APPROVED FACTOR AND SALES DETAILS



Go to the Salesforce Account  select Details, go to Pricing Information

- Approved Selling Factor is listed
- Notes section will auto-document Change details and any other Notes entered regarding Account Pricing

Go to Sales Information

- YTD Factor Variance and YTD Factor Vs. LY Factor will be listed

CHANGE TO AN ACCOUNT APPROVED SELLING FACTOR

- In the Account  Click  and SELECT – Change Selling Factor
- In the Pop-Up Box – Enter Factor and Reason
- Use Chatter in the Account for any additional communication
- Manager and/or VP to Approve or Reject

Activity Details Chatter

▼ Pricing Information			
Approved Selling Factor	28.00%	Pricing Notes	
▼ Sales Information			
MTD Sales	\$34,802.74	YTD Factor	27.03
YTD Net	\$117,156.24	Variance - Approved Selling Factor	-3.48%
LY Net	\$272,915.62	LY Factor	27.38
		Variance - YTD v. LY Factor	-1.31%