



## Multiple Rep Order Process

Date: August 9, 2018

Written by: Paul Stewart – Director Sales & Marketing

Desert Aire rep agreement includes provisions for Split Rep Credit. Specifically, Engineering Credit; Destination Credit; & Order Credit have been defined for split credits. This document is intended to communicate the following:

1. Definitions
2. Split Credit Overview
3. Process for transferring ProjectAire selection to the Destination Rep for bidding/ordering
4. Process for compensating all reps involved in a Split Credit Order

### Definitions:

**Engineering Credit Sales Rep:** this is the sales rep that has worked with the engineer of record that is identified on the equipment schedule and plans. This engineer must be located in the sales rep's territory.

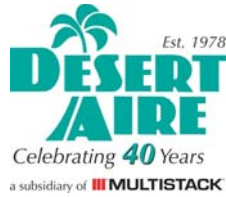
**Destination Credit Sales Rep:** this is the sales rep whose exclusive territory includes the location where the equipment will be installed & operated.

**Order Credit Sales Rep:** this is the sales rep whose exclusive territory includes the location where the purchasing contractor's office is located.

### Split Credit Overview

Desert Aire Rep Agreement indicates that the following Split Credit is to be used for projects that involve multiple sales rep firms.

- **Engineering Rep Credit:** 20% to 50% Profit Credit
  - 50% Engineering Credit is selected when Desert Aire is named as Basis of Design (BOD) or the performance listed on the schedule is from our selection
  - 20% Engineering Credit (Influence) is to be used when competitors are named as BOD but sales rep that calls on the engineer for the project secures Desert Aire as an approved provider for the project.
  - Desert Aire sales management reserves the right to establish Engineering Credit value.
- **Destination Rep Credit:** 20% Profit Credit
- **Order Rep Credit:** 30% Profit Credit



## ProjectAire Transfer Process

In order to secure Engineering Credit for a project that will be installed outside of the engineering sales rep territory the following should be completed:

1. Complete a ProjectAire selection that includes only the final equipment that has been approved by the engineer of record and is included on the equipment schedule. Include the Engineer contact details in ProjectAire on the Project Information page. Update the Project Status to **BUDGET**.
2. Identify the Destination for the project and the Desert Aire sales rep that supports the Destination location. This can be done by using Rep Locator or working with Desert Aire Region Manager.
3. Engineering Sales Rep to retain PDF of the Submittal & the Pricing Summary for the approved unit selections.
4. Advise the Desert Aire Region Manager of the ProjectAire ID # so that he can transfer the project to the Destination Sales Rep. Input on timing of bidding and suggested contractor discount would be valuable.
5. Desert Aire Region Manager will add Commission Split to Pricing Pages of ProjectAire and then transfer the project to the Destination Rep with details on the Engineering Rep and contact details (Name, phone, email).

It is recommended that the Engineering Rep and Destination Rep communicate regularly in order to share project status details. Missing the Bid Date would not be beneficial for anyone.

## ProjectAire Order Entry

When successful in securing the order for a Split Credit Project the Ordering Rep will need to follow these instructions for communicating split credits.

**Commission Order:** This is the preferred method for entering Split Credit Orders. The Rep Split details are entered on the General Setup Pricing Screen of ProjectAire. Use the **Production Instructions** box to detail split % and all reps involved. Desert Aire compensates all reps identified as part of standard Commission procedure.

**Buy Resell Order:** If a Buy Resell Order is preferred then the **Ordering Rep** must do the following:

- include the Rep Split details on the General Setup Pricing Screen
- enter the dollar value that each rep is to be compensated (Use the Special Price Adders screen)
- send a copy of their contractor purchase order to their Region Manager

Special Line Item Adders (does not qualify for rep margin or commission)			
Examples include credit card fee, expediting fee, special start-up fee, etc.			
Add new line item	Description	Net Adder	
	Rep Split Commission to be paid to ABC Sales for Eng Credit	3450	Clear This Line's Entry

## Multiple Rep Order Process



Desert Aire collects this amount on the Special Line Item Adder and then compensates each rep identified according to the value stated. If there are multiple reps involved then please enter each sales rep and compensation.

### Split Credit Orders & Sales Credit for Rep Quota

Desert Aire splits the sales revenue for all Split Credit Orders according to the Rep Split details approved for the order. For example, if the Rep Split is 50/50 between the Engineering Sales Rep and Order/Destination Rep then the Sales Bookings are split 50/50 as well.