

# Web Link Help File: Salesman Setup

## Abstract

- This help file will demonstrate how to register salesmen on the site and assign them to specific customer accounts.

## Procedure

- 1) Sign into the site as website administrator user.
- 2) The first step is to create a Salesman account. To do this select "Manage Salesperson Accounts" from the Customer Account Management menu. (fig. 1)



fig.1

- 3) Enter a Sales Person ID number and a Sales Person Name. The account can be set as the primary account if desired. Doing so will automatically assign this salesman to all customer accounts by default when they are created. When finished click the "Save" button to create the new salesman account. All currently active accounts are listed in the table below. (fig.2)

### Manage Salesperson Accounts

Sales Person ID   
Max 5 characters

Sales Person Name   
 This is a Primary Sales Person

→

Sales Person Name	Sales Person ID	Set as Primary Sales Person	
Default Salesman	0	<a href="#">Set as Primary Sales Person</a>	
QA	12344	<a href="#">Set as Primary Sales Person</a>	
New Salesman	12345	<a href="#">Set as Primary Sales Person</a>	
<b>1</b>			

fig.2

- 4) The next step is to create a login for the newly created salesman account. Select the "Register a Salesperson" option in the User Login Management menu. (fig.3)

**web Link**  
SPECIALIZED ECOMMERCE SOLUTIONS

Start your search here

Customer# **DEFAULT** Home > Contact Us

**Contact Us**

**Web Link Solutions Corporation**  
 10028 NW 57th Place  
 Coral Springs, FL 33076

**General Inquiries:** [info@weblinkcorp.com](mailto:info@weblinkcorp.com)  
**Sales Inquiries:** [sales@weblinkcorp.com](mailto:sales@weblinkcorp.com)  
**Support Inquiries:** [websupport@weblinkcorp.com](mailto:websupport@weblinkcorp.com)

[Learn More About Web Link](#)  
[Follow Us on Twitter](#)  
[Find Us on Facebook](#)

**User Login Management** (Menu items):  
 Register Wholesale or Retail User  
 Register an Internal User  
 Register Wholesale User  
 Edit User  
 Add a New User Security Role  
 Manage User Security Roles  
 Register a Salesperson  
 Manage User Preferences  
 Approve Pending User Logins  
 Customer Account Management

fig.3

- 5) The following page lists all active salesman accounts including the new account created. Click on the Salesperson Name to open the Registration page. Complete the form by entering name, email address, username and password. Click on the "create login" button to save the registration. (fig. 4 and 5)

## Register a Salesperson

Listed below are all Salesperson.

Click on Salesperson's name to see the details of the salesperson and to create Logins.

Salesperson Name	Salesperson ID	Business System Login
<a href="#">Default Salesman</a>	0	
<a href="#">QA</a>	12344	
<a href="#">New Salesman</a>	12345	
<a href="#">New Salesman Account</a> ←	123	

fig.4

## Register a Salesperson

Currently there are no Login(s) for this Salesperson

The Details of the Salesperson Selected is below:

**Salesperson Name** New Salesman Account  
**Business System Login**

### Create New Logins for the Salesperson

<b>First Name</b>	<input type="text" value="weblink"/>
<b>Last Name</b>	<input type="text" value="weblink"/>
<b>Email</b>	<input type="text" value="websupport@weblinkcor"/>
<b>User Name</b>	<input type="text" value="weblink"/>
<b>Password</b>	<input type="password" value="....."/>
<b>Confirm Password</b>	<input type="password" value="....."/>
	<input type="button" value="Create Login"/> <input type="button" value="Clear"/>

fig.5

- 6) Now that the salesman has been created it can be assigned to specific customer accounts. In this example the Default account has been chosen. This will allow the salesman to view and manage only these assigned accounts upon login to the site. From the Customer Account page select the desired salesman account from the Default Salesman drop down menu and click "update" at the bottom of the page. (fig. 6 and 7)

## Edit Customer

Fields in bold are mandatory.

### Customer settings

<b>Customer #</b>	<input type="text" value="DEFAULT"/>
<b>Gateway ID</b>	<input type="text" value="DC01"/> ⓘ
<b>Company Name</b>	<input type="text" value="WebLink"/>
<b>Default Salesman</b>	<input type="text" value="Default Salesman"/> ↓ ←
<b>Inventory settings</b>	
<b>Primary Location</b>	<input type="text" value="--- Location Default ---"/> ⓘ Suggested Shipment
Alternate Location1	<input type="text" value="MRS Test Location 1"/> Suggested Shipment <input type="text" value="--- Location Default ---"/>
Alternate Location2	<input type="text" value="MRS Test Location 2"/> Suggested Shipment <input type="text" value="--- Location Default ---"/>
<b>MCL Group Name</b>	<input type="text" value="main"/>
Catalog Plan	<input type="text" value="Test Plan"/>

fig.6

**AR Settings**

This customer has a different AR Location

This customer has a different AR customer number

**Shop Management System**

Mitchell

Lankar

fig.7

- 7) When a registered salesman user logs into the site they will be able to access and manage only those accounts that they have been assigned to. In this example the salesman can run a sales history report for the Default account as this is the only account assigned. (fig 8)

**Sales History**

You can view report by selecting any or none of the fields below. In case you haven't selected any field it will show all the records.

Date From:    
(mm/dd/yyyy)

To:    
(mm/dd/yyyy)

Web Process #

Account#  OR

Advanced options

Export To Excel / Print

Customer #	Customer Name	Order Date	Gateway #	Process #	PO #	Core Sales	Parts Total	Ship Charges	Sales Tax	Order Total
DEFAULT	Anonymous (Anonymous Anonymous)	10/15/2012	<u>17023</u>	743	TEST ORDER	\$0.00	\$5.75	\$0.00	\$0.00	\$5.75
DEFAULT	Dealer (Sample Customer)	10/19/2012	<u>17025</u>	744	***TEST ORDER***	\$0.00	\$2.43	\$24.00	\$0.12	\$26.55

fig.8