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)

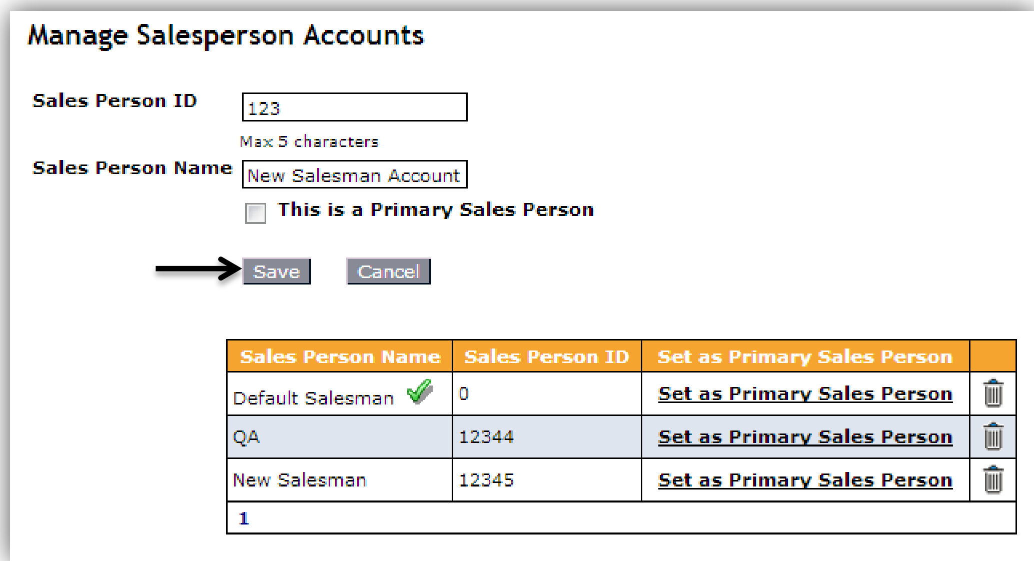
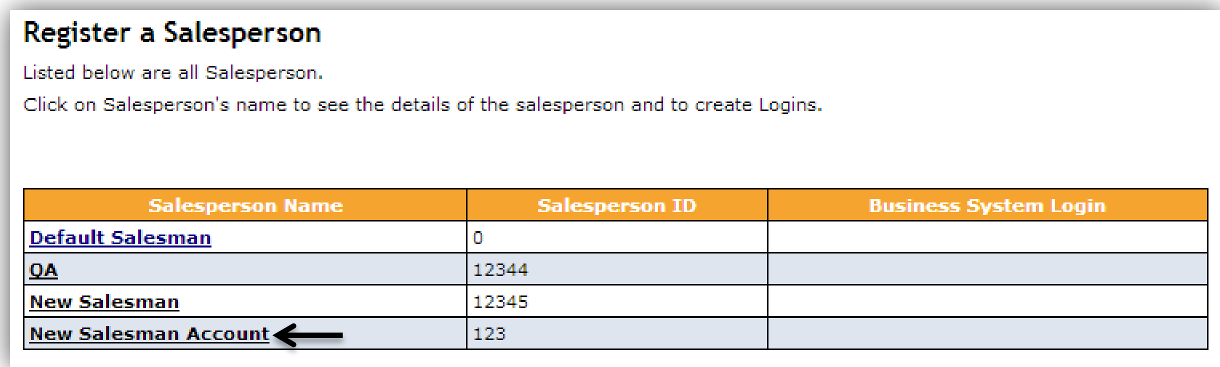


fig.2

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)

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
Default Salesman	0	
QA	12344	
New Salesman	12345	
New Salesman Account	123	

fig.4

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)

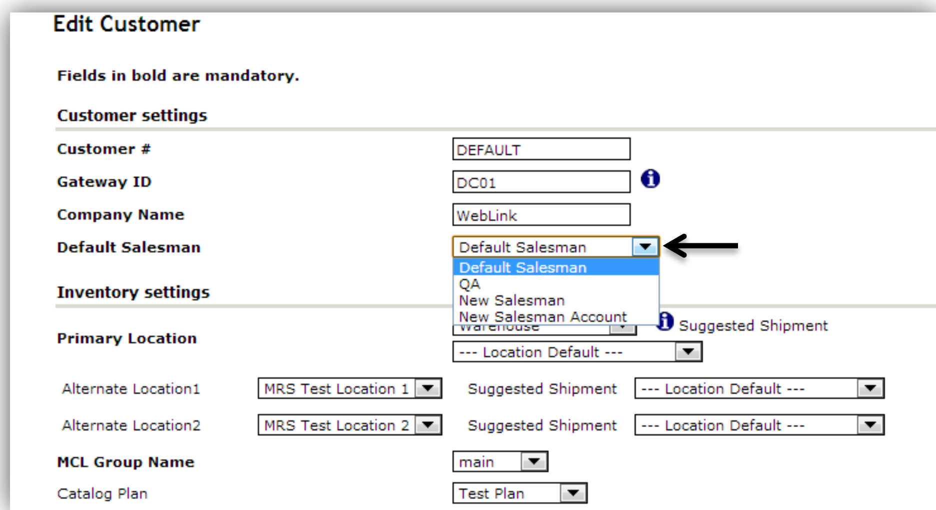


fig.6

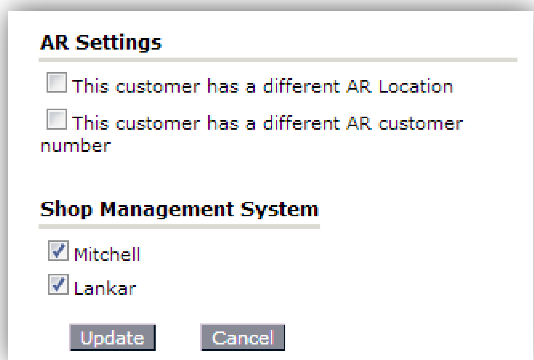
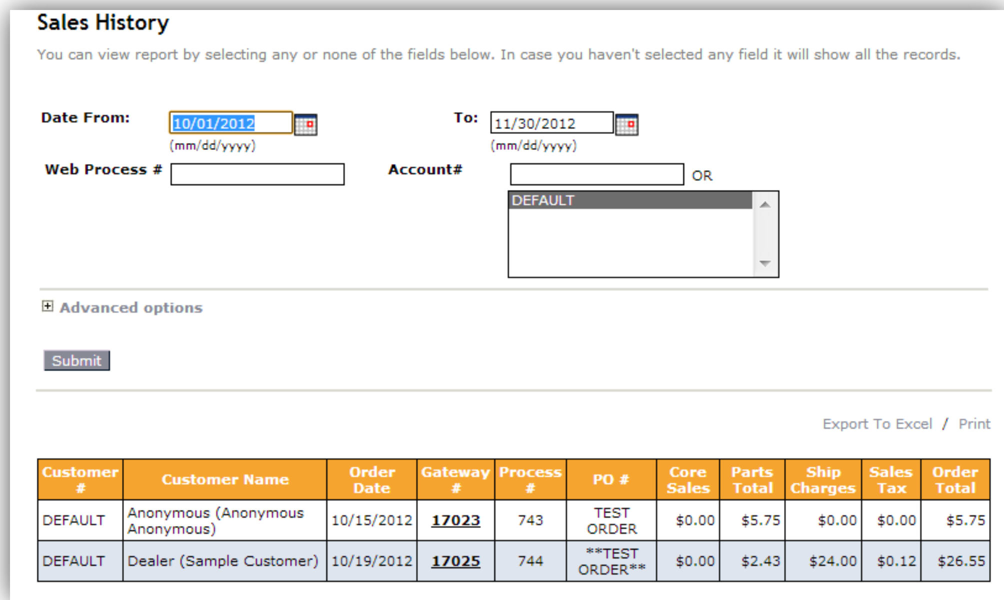


fig.7

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)



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	17023	743	TEST ORDER	$0.00	$5.75	$0.00	$0.00	$5.75
DEFAULT	Dealer (Sample Customer)	10/19/2012	17025	744	**TEST ORDER**	$0.00	$2.43	$24.00	$0.12	$26.55

fig.8