

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)

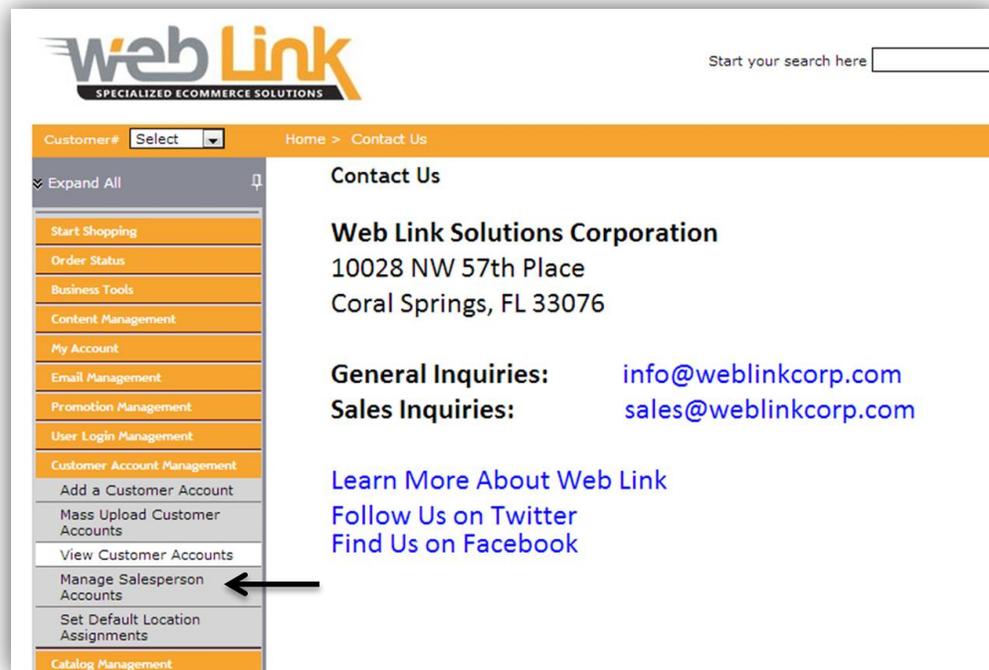


fig.1

- 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	Set as Primary Sales Person	
QA	12344	Set as Primary Sales Person	
New Salesman	12345	Set as Primary Sales Person	
1			

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)

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

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

Customer #	<input type="text" value="DEFAULT"/>
Gateway ID	<input type="text" value="DC01"/> ⓘ
Company Name	<input type="text" value="WebLink"/>
Default Salesman	<input type="text" value="Default Salesman"/> ↓ ←
Inventory settings	
Primary Location	<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 ---"/>
MCL Group Name	<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

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