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# **Customer Default Item Reps**

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#### Overview

The Customer Default Item Reps tab allows you to assign a item specific Sales Representatives for an individual Customer when an Item Number or Item Class is placed on a Sales Document.

#### Usage

Adding a Definition

2.	Go to Customer Searc Applicat SalesPad Today Pull up a Customer	h ion CRM er Sales Monitor					
	Contact	Cust#	Cust Name		*		
	Frank Kwan						
	Jean Smith						
	Bob Fitz						
	Tim Bradley		Aaron Eitz Ele	ectrical	,		
	Thomas Hammond	AAKONIIIU		cuicai	/		
	Tom Jones						
	Thomas Hanson						
	Robert Fitz Jr.						
3.	Click on Default Item	Reps on the p	ost specific ta	ıbs			
	Equipment Audit	Interaction	ns Opportu	nities	Kwiktag	Default Item Reps	Item Sales
	🕴 🖶 Add Definition	) 💢 Delete l	Definition				·
4.	Click Add Definition						
	👍 Add Definition	🛛 💢 Delete l	Definition				
5.	Add an Item Number	or Item Class					
	🕂 🕂 Add Definition	样 Delete [	Definition				
	Item Rep Definition	ID Item Numb	ber	Item C	lass		
		3 HD-20					

**Note:** Only an Item Number or an Item Class can be assigned to a Sales Representative. Both cannot be specified per Sales Representative.

Contract Pricing	Email Audit	Child Accounts	Equipment	Audit	Interactions	Opportunities	Kwiktag	Default Item Reps	Item Sales		${ \blacksquare } \rightarrow$
🕂 Add Definiti	on 💢 Delete	Definition									
Ttem F	ep Definition II	Item Number		It	em Class		Sales Rep I	ID	Customer I	Num	
	:	3 <u>HD-20</u>					GREG E.			0001	
udd a Sales Representative											

Ttem Rep Definition ID	Item Number	Item Class	Sales Rep ID	Customer Num
3	HD-20		GREG E. 👻	AARONFIT0001

#### Putting on an Order

1.	Click the <b>Order</b> button near the top of the Customer Tab							
		Quote 🔻	BLANK	ET ORDE	R 🝷 📄 In	voice 🔹	📄 Return	•
2.	Go to Line Item	ns when t	he order open	.S				
	Line Items	Notes	Addresses	Holds				
	🛃 New 🙀	Delete	📫 Insert					
3.	Click New							
	Line Items	Notes	Addresses	Holds				
	📑 New 🙀	Delete	📫 Insert					

4. Add in your Item Number or Item Class and you will be able to see your Sales Representative
Note: Make sure you have the Sales Representative column in the grid. If not follow these steps:
1. Right-click and select Column/Band Chooser

Description	
20 Gig Hard Drive	A Sort Ascending
-	Z↓ Sort Descending
	Clear All Sorting
	😑 Group By This Column
	🖶 Show Group By Box
	Remove This Column
	Column/Band Chooser
	🛱 Best Fit
	💡 Filter Editor
	Show Find Panel
	Show Auto Filter Row

2. Click Sales Person ID

UOfM	Customization x					
EACH	Columns Bands					
	Rental					
	Rollup					
	Sales Doc Num					
	Sales Doc Type					
	Sales Person ID					
	Sales Territory					
	Sample					
	Separate Delivery Required					

3. Drag into the grid

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### Security and Settings

## Security

Customer Default Item Reps - Allows users to access the Customer Default Item Reps tab on the Customer Card

## Settings

Default Line Item Rep By Item Number - Controls how line item sales reps are default in sales entry.