Customer Default Item Reps

Megan De Freitas - 2024-11-22 - Sales
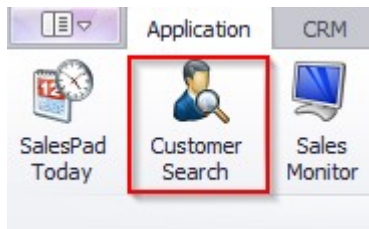
Overview

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.

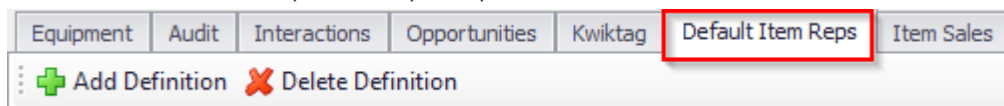**Usage**

Adding a Definition

1. Go to Customer Search
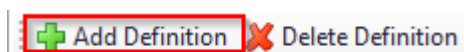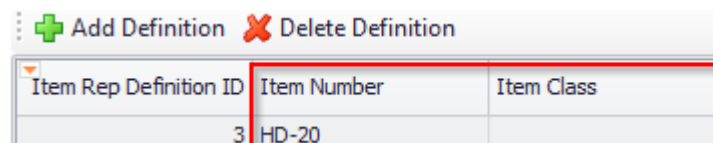

2. Pull up a Customer

3. Click on Default Item Reps on the post specific tabs

4. Click **Add Definition**

5. Add an Item Number or Item Class

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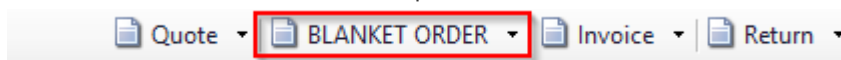
6. Add a Sales Representative

Putting on an Order

1. Click the **Order** button near the top of the Customer Tab

2. Go to Line Items when the order opens
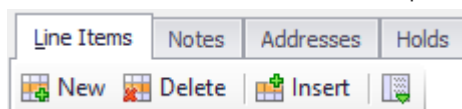
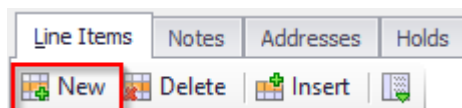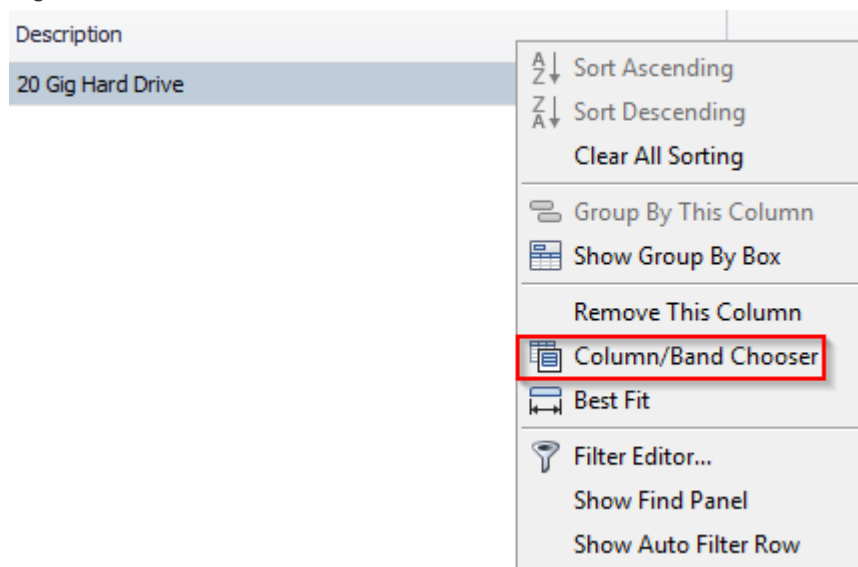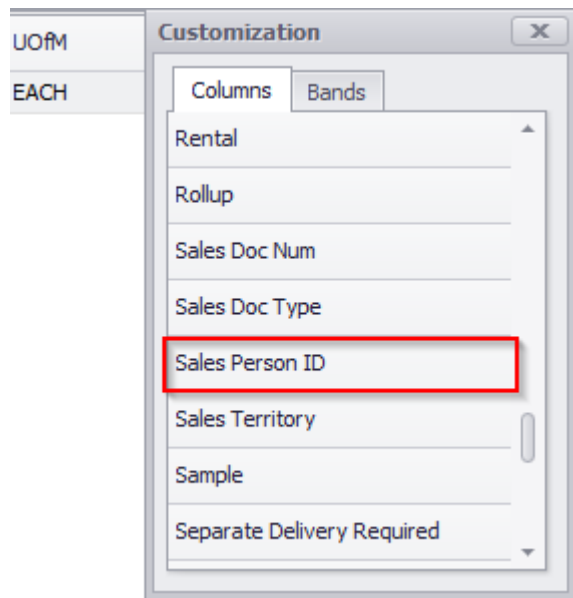
3. Click **New**

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

   2. Click Sales Person ID

3. Drag into the grid

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.