



Customer Default Item Reps

Megan De Freitas - 2024-11-22 - Sales

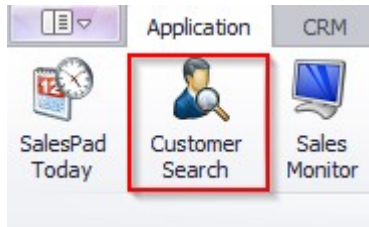
Overview

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

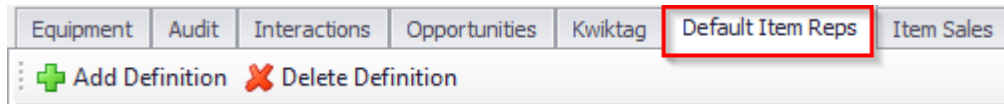
1. Go to Customer Search



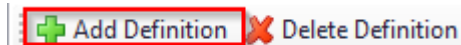
2. Pull up a Customer

Contact	Cust#	Cust Name
Frank Kwan		
Jean Smith		
Bob Fitz		
Tim Bradley		
Thomas Hammond	AARONFITZ	Aaron Fitz Electrical /...
Tom Jones		
Thomas Hanson		
Robert Fitz Jr.		

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



4. Click **Add Definition**



5. Add an Item Number or Item Class

The screenshot shows a dialog box with a table. The table has two columns: 'Item Number' and 'Item Class'. The 'Item Number' column contains the value 'HD-20'. The 'Item Class' column is empty. The table is highlighted with a red rectangular box.

Item Rep Definition ID	Item Number	Item Class
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.

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

6. Add a Sales Representative

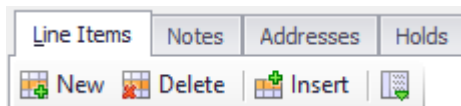
Item Rep Definition ID	Item Number	Item Class	Sales Rep ID	Customer Num
3	HD-20		GREG E.	AARONFIT0001

Putting on an Order

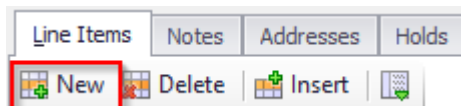
1. Click the **Order** button near the top of the Customer Tab



2. Go to Line Items when the order opens



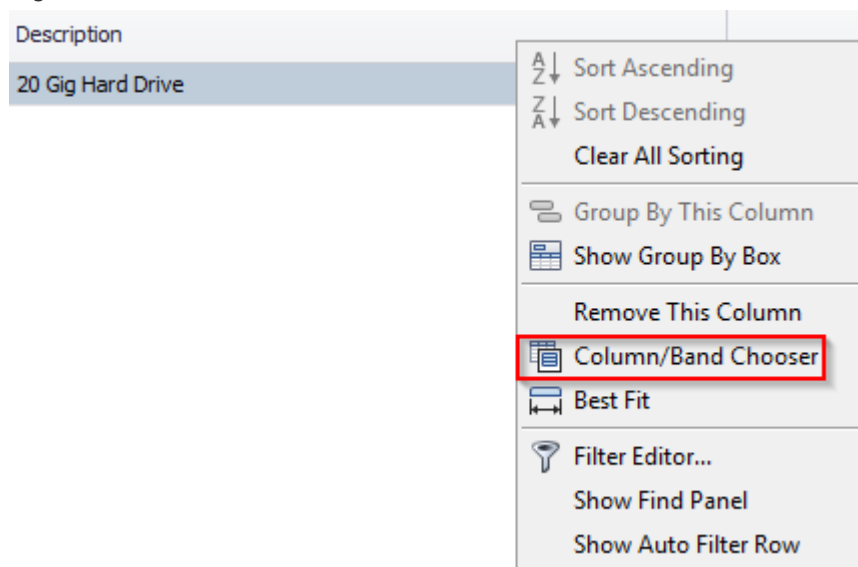
3. Click **New**



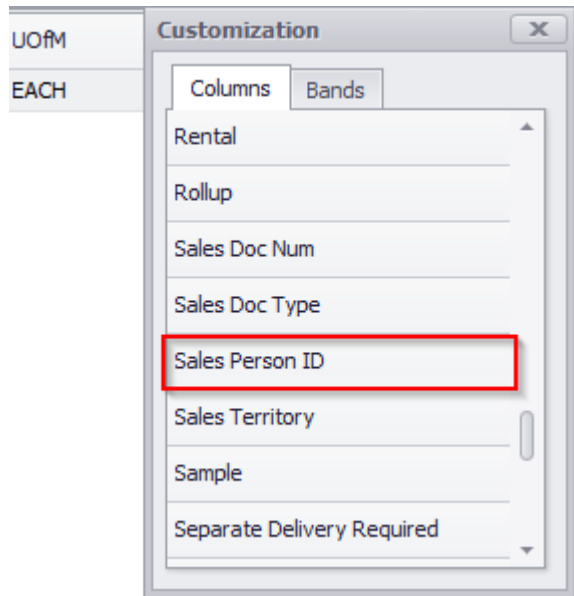
4. Add in your Item Number or Item Class and you will be able to see your Sales Representative

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.