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

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.