Customer Default Item Reps

Cavallo Support - 2024-11-22 - Sales

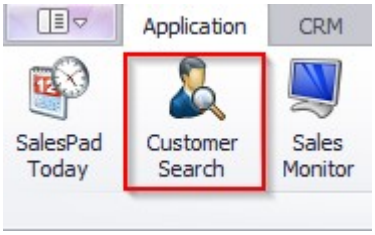
Overview

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

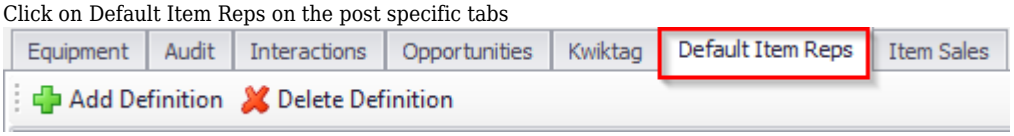
1. Go to Customer Search



2. Pull up a Customer



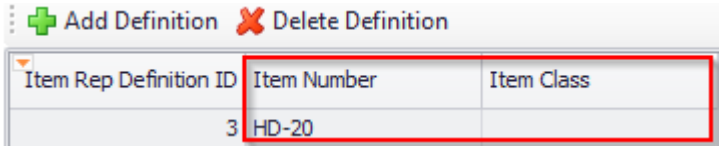
3. Click on Default Item Reps on the post specific tabs



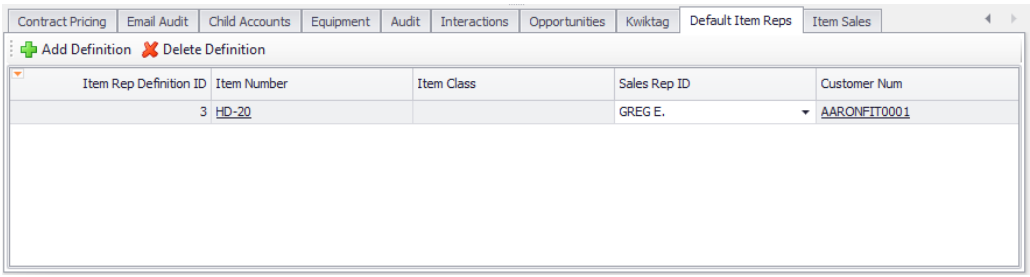
4. Click **Add Definition**



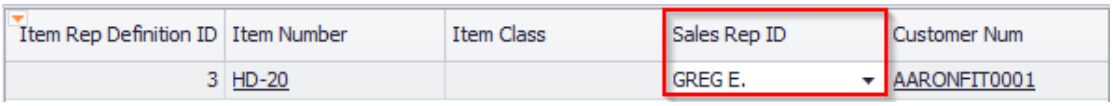
5. Add an Item Number or Item Class



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

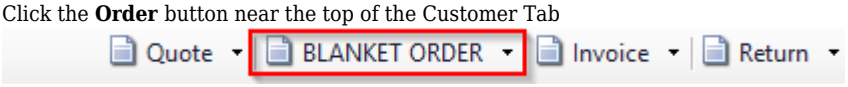


6. Add a Sales Representative

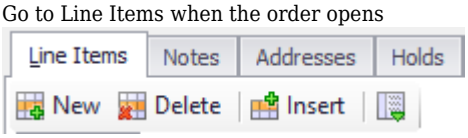


Putting on an Order

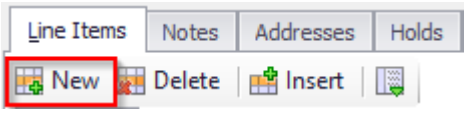
1. Click the **Order** button near the top of the Customer Tab



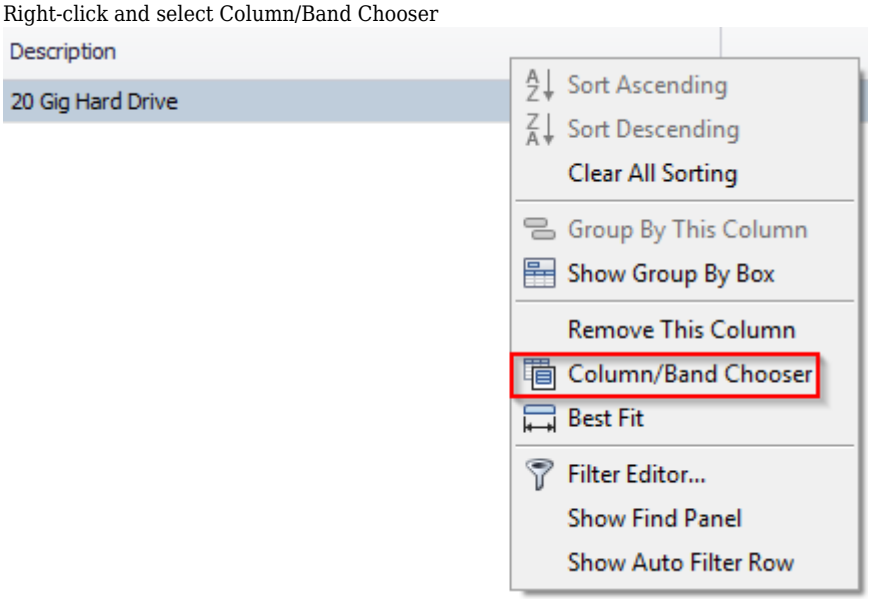
2. Go to Line Items when the order opens



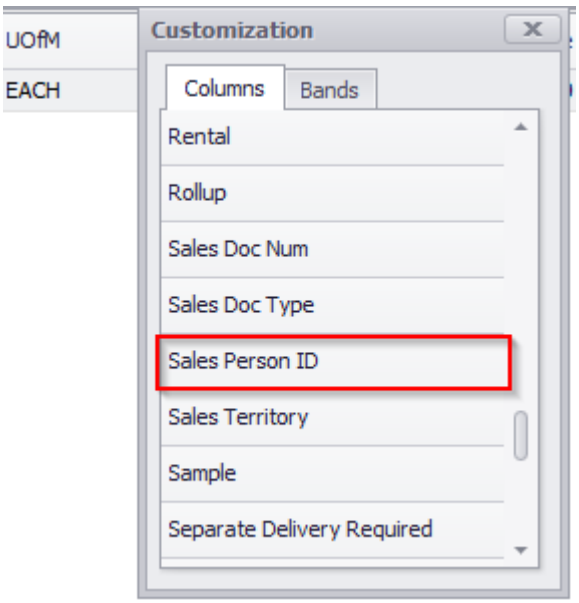
3. Click **New**



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.