

amasty

For more details see the [Sales Reps and Dealers](#) extension page.

Guide for Sales Reps and Dealers

Benefit from a wide network of sales reps and dealers. Assign customer groups to a particular sales reps and dealers to let them manage only their part of your store audience. On top of that, the extension provides you with a convenient set of tools to control sales reps and dealers.

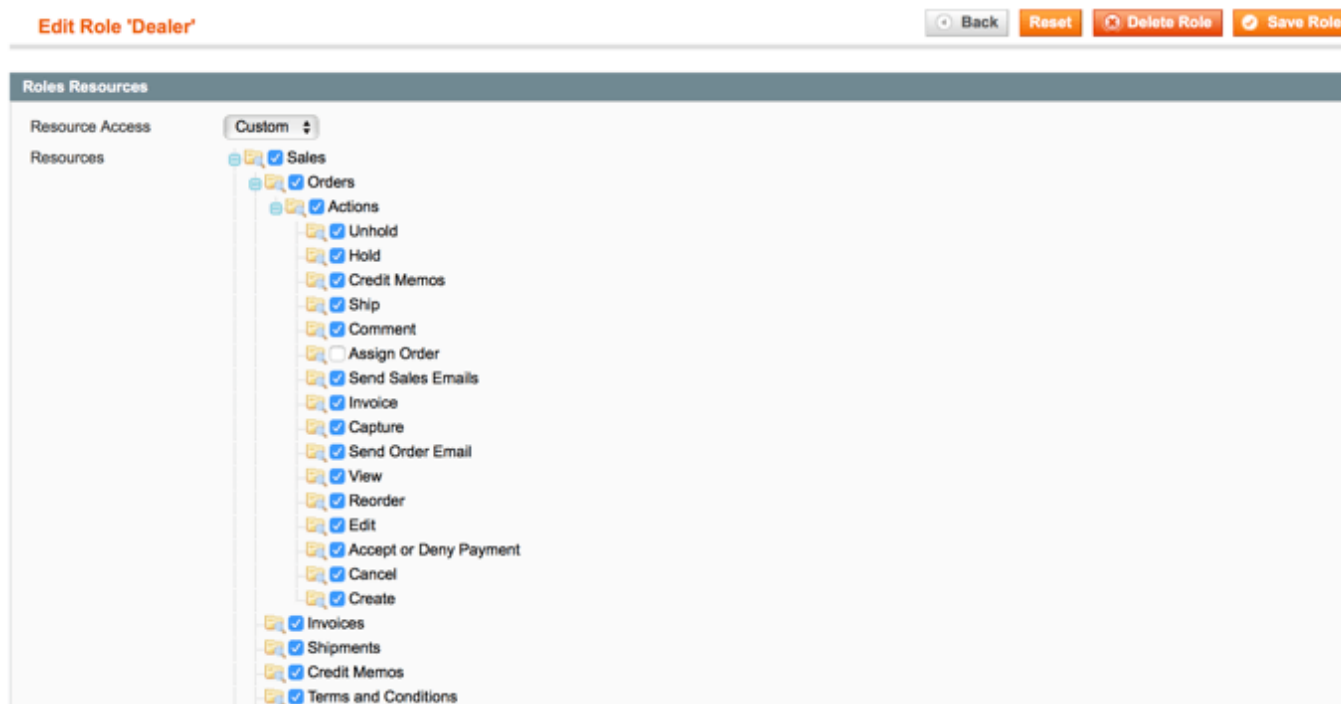
- Distribute customers between sales reps and dealers
- Allow reps to manage orders only for their customers
- Assign individual dealers to important customers
- Control your sales reps and dealers using built-in tools

Extension Configuration

First of all you need to create a user role for sales representatives and dealers. Navigate to **Admin panel** → **System** → **Permissions** → **Roles** and press the **Add New Role** button.

Raise customer service and shopping experience to the new level with the return merchandise authorization system to establish the efficient [RMA request](#) process.

Then, specify the role resources.



When specifying the role resources, please be aware that our extension works only for orders and customers and its restrictions apply to 'Orders', 'Invoices', 'Shipments', 'Credit Memos' and 'Customers' sections. You can assign other resources to the role, however they will not be restricted.

Roles + Add New Role

Page of 1 pages | View per page | Total 3 records found Reset Filter Search

ID ↑	Role Name
1	Administrators
6	Dealer

After you've created the new role, please see what ID it has and proceed to the next step.

General settings

Go to **System → Configuration → Sales Reps and Dealers**. Fill in the ID of the role in the **Role ID** field and save configuration. You can specify more than one role for sale reps and dealers.

General		
Role ID	<input type="text" value="6"/>	[GLOBAL]
	▲ Restrictions for viewing customers and orders will be applied for this role only.	
Default Dealer	<input type="text" value="No"/>	[STORE VIEW]
	▲ All new orders will be assigned to this dealer except if a specific customer is already assigned to another dealer.	
Send Notification to a Dealer about New Order	<input type="text" value="Yes"/>	[GLOBAL]
Email Sender	<input type="text" value="General Contact"/>	[GLOBAL]
Email Template	<input type="text" value="Amasty Sales Reps New Order Notification Tem"/>	[GLOBAL]
Show Re-assign Fields	<input type="text" value="Yes"/>	[GLOBAL]
	▲ On the order view page in Backend.	
Show From To	<input type="text" value="Yes"/>	[GLOBAL]
	▲ From whom to whom re-assigned order.	
Show Author of Message	<input type="text" value="Yes"/>	[GLOBAL]
Hide the `Manage Customers` tab	<input type="text" value="No"/>	[GLOBAL]
	▲ On the `Edit User` page (the `Edit Dealer` page).	
Show All Customers	<input type="text" value="No"/>	[GLOBAL]
	▲ Allow dealers to see all customers.	
Show All Orders	<input type="text" value="Yes"/>	[GLOBAL]
	▲ Allow dealers to see all orders.	
Assign Order by Customer in the Backend	<input type="text" value="No"/>	[GLOBAL]
	▲ If set to Yes, the extension will try assign order by customer, otherwise to creator as usual.	

Also, from here you can configure the following settings:

Default Dealer — set the default dealer to assign all new orders to. Excepting the cases when a customer is already assigned to another dealer;

Send New Order Email to the Dealer — enable this option to send a copy of the order email to the associated dealer;

Show Re-assign Fields — enable this option to show this field on the order view page in backend;

Show From To — enable this option to display from whom to whom the order was re-assigned.

Show Author of Message — activate to show the author of message;

Hide the `Manage Customers` tab — enable to hide the edit user page;

Show All Customers — enable this option to show all customers;

Show All Orders - select **Yes** to let dealers see all orders;

Assign Order by Customer in the Backend — set to **Yes** to try assigning order by customer, otherwise the order will be assigned to creator as usual.

Create users for the role

Next, navigate to **System** → **Permissions** → **Users** to create users for the role.

Users [+ Add New User](#)

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ID	User Name	First Name	Email	Status
1	admin	admin	admin@example.com	Active
2	dealer	Frank	dealer@example.com	Active
3	demouser	demo	demouser@example.com	Active

Hit the **Add New User** button and fill in the required **User Info**. Then, on the **User Role** tab assign the user to the role and save the user.

Assign customers to the users

Edit the created user once again to see new tabs added by the extension.

User Information [Back](#) [Reset](#) [Delete User](#) [Save User](#)

Manage Customers [Reset Filter](#) [Search](#)

Page 1 of 1 pages | View 20 per page | Total 6 records found

ID	Name	Email	Dealer
1	John Doe	john.doe@example.com	Frank Wilson
2	Jerome Welch	Jerome@example.com	Frank Wilson
3	Hugh Sander	hugh@example.com	Frank Wilson
4	Example Customer	customer@example.com	Frank Wilson
5	Helena Example	helena@example.com	Frank Wilson
6	Polly Ivanovich	customer@ddb.com	Frank Wilson

At the **Manage Customers** tab you can assign customers to the user.

The user will be able to see only these customers on the 'Manage Customers' grid, only orders placed by these customers on the order grid and documents (invoices, shipments and credit memos) related to orders of these customers.

Order #	Purchase On	Bill to Name	Shipped to Name	Base Grand Total	Base Discount Amount	Base Discount Canceled	Base Discount Invoiced	Base Discount Ref
100000004	2013-12-17 13:16:42	John Doe	John Doe	7429.9400	0.0000			
100000005	2013-12-17 13:29:43	Jerome Geren	Jerome Geren	2694.9500	0.0000		0.0000	
100000006	2016-09-14 16:58:44	Joe Brick	Joe Brick	154.9900	0.0000			
100000007	2017-04-05 15:05:22	Polly Ivanovich	Polly Ivanovich	114.9900	0.0000			

At the **Reports** tab you can see the list of orders placed by customers assigned to this user.

It is possible to filter and sort orders on this grid. So, for example, if you pay commissions to sales reps/dealers based on complete orders, you can filter the list to show only complete orders.

Allowed Customer Group *

- All
- General
- Wholesale
- Retailer
- QAAAA

At the **Restrictions** tab you can assign the user to a particular customer group.

By default users are assigned to all customer groups. If you assign a user to a certain group, he or she will be able to add customers only to this group.

Hence, when being logged in as a dealer and tried to create the order for any customer assigned to you, you'll be able to specify only the customer group set by the store administrator.

Dealer Description

Dealer

State: USA

Path: h3

Send copy of email to

At the **Additional** tab you can specify additional info about the dealer/sales rep. The info will be displayed to assigned customers on the checkout page as well as on the customer account page.

This info can be added and edited only by a store admin user.

Log in as a dealer

When logged in as a dealer, all customers created by the user from the admin panel are automatically assigned to this user. Also, it is possible to filter 'Not Assigned' dealers on customer and order grids.

Manage Customers Add New Customer

Page 1 of 1 pages | View 20 per page | Total 6 records found | Export to: CSV | Export | Reset Filter | Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected | Actions | Submit

ID	Dealer	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Website	Action
6	Frank Wilson	Polly Ivanovich	customer@dddb.com	General	45634 643	46436	United States	Alaska	Apr 5, 2017 8:05:22 AM	Main Website	Edit
5	Frank Wilson	Helena Example	helena@example.com	General	271933	83001	United States	Arizona	Dec 29, 2014 6:11:18 AM	Main Website	Edit
4	Frank Wilson	Example Customer	customer@example.com	General	573630	32044	United States	Florida	Dec 29, 2014 6:07:23 AM	Admin	Edit
3	Frank Wilson	Hugh Sander	hugh@example.com	General	681540	71110	United States	Louisiana	Dec 17, 2013 4:47:40 AM	Main Website	Edit
2	Frank Wilson	Jerome Welch	Jerome@example.com	General	432156	23456	United States	Arkansas	Dec 17, 2013 4:27:36 AM	Main Website	Edit
1	Frank Wilson	John Doe	john.doe@example.com	General	1234567	12345	United States	Arizona	Aug 30, 2007 4:23:13 PM	Main Website	Edit

On the **Manage Customers** page you can see only customers assigned to this user.

When creating an order from the admin panel, sales reps and dealers can only create orders for customers that are assigned to them.

The **Dealer** column is added to the order grid, so the main admin can see which orders are assigned to what dealers, filter and sort orders by dealers.

Reassign dealers to orders

To assign the order to dealer or to admin, please open **Admin Panel → Sales → Orders → Information**.

Order # 100000007 | Apr 5, 2017 8:05:22 AM

Back Edit Cancel Send Email Hold Invoice Ship Reorder

Order # 100000007 (the order confirmation email was sent)	
Order Date	Apr 5, 2017 8:05:22 AM
Order Status	Pending
Purchased From	Main Website Main Store English
Placed from IP	213.184.226.82

Account Information	
Customer Name	Polly Ivanovich
Email	customer@dddb.com
Customer Group	General
Assign To	Frank Wilson
2017-04-05 16:11:44 Assigned From Admin To Frank Wilson	

One can write a comment when assigning the order.

Reassignment notifications

Go to **System** → **Configuration** → **Sales Reps and Dealers** → **Re-assigned Order Notifications** to setup email notifications for reassignment of dealers.

Sales Reps and Dealers

Save Config

General		
Re-assigned Order Notifications		
Send Emails	Yes	[GLOBAL]
▲ Indicate 'Yes' to send a notification about re-assigned order to the new and old dealers.		
Dealer Can Assign Order to Other Dealers	No	[GLOBAL]
▲ Indicate 'No' if you want dealer to assign orders to the store administrator only.		
Admin Email	noreply@example.com	[GLOBAL]
▲ If an order assigned from a dealer to the store admin, email will be sent to this address.		
Email Sender	Sales Representative	[GLOBAL]
Email Template	Amasty Sales Reps Notification Template (Defal	[GLOBAL]
Frontend		
Other		

Send Emails — set to **Yes** to send notifications to both new and old dealer once an orders is reassigned;

Dealer Can Assign Order to Other Dealers — set to **Yes** to let dealers assign orders to the other dealers or **No** to assign orders to the store administrator only;

Admin Email — fill in the admin email;

Email Sender — specify the email sender;

Email Template — define the email template.

To make sure that customers know the name of their dealers you can add these variables to the email template:

```
{{var dealer.firstname}} {{var dealer.lastname}}
```

Assign customers to dealers

Admin user can assign customers to different dealers via mass action.

Dealer	Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Action
Frank Wilson	10000007	Main Website Main Store English	Apr 5, 2017 8:05:22 AM	Polly Ivanovich	Polly Ivanovich	\$114.99	\$114.99	Pending	View
Frank Wilson	10000006	Main Website Main Store English	Sep 14, 2016 9:58:44 AM	Joe Brick	Joe Brick	\$154.99	\$154.99	Pending	View
Frank Wilson	10000005	Main Website Main Store English	Dec 17, 2013 5:29:43 AM	Jerome Geren	Jerome Geren	\$2,694.95	\$2,694.95	Complete	View
Frank Wilson	10000004	Main Website Main Store English	Dec 17, 2013 5:16:42 AM	John Doe	John Doe	\$7,429.94	\$7,429.94	Pending	View
	10000003	Main Website Main Store English	Dec 17, 2013 5:03:44 AM	Jerome Welch	Jerome Welch	\$6,299.93	\$6,299.93	Pending	View
	10000002	Main Website Main Store English	Dec 17, 2013 4:56:00 AM	Hugh Sander	Hugh Sander	\$5,806.84	\$5,806.84	Complete	View
	10000001	Main Website Main Store English	Dec 17, 2013 4:51:55 AM	John Doe	John Doe	\$1,084.98	\$1,084.98	Pending	View

Go to **Customers → Manage Customers**, select multiple customers and choose the **Assign to Dealer** action from the dropdown menu.

Customer Information

- Customer View
- Account Information**
- Addresses
- Orders
- Billing Agreements
- Recurring Profiles (beta)
- Shopping Cart
- Wishlist

Helena Example Back Reset Log In as Customer Create Order

Account Information

Associate to Website *

Created From

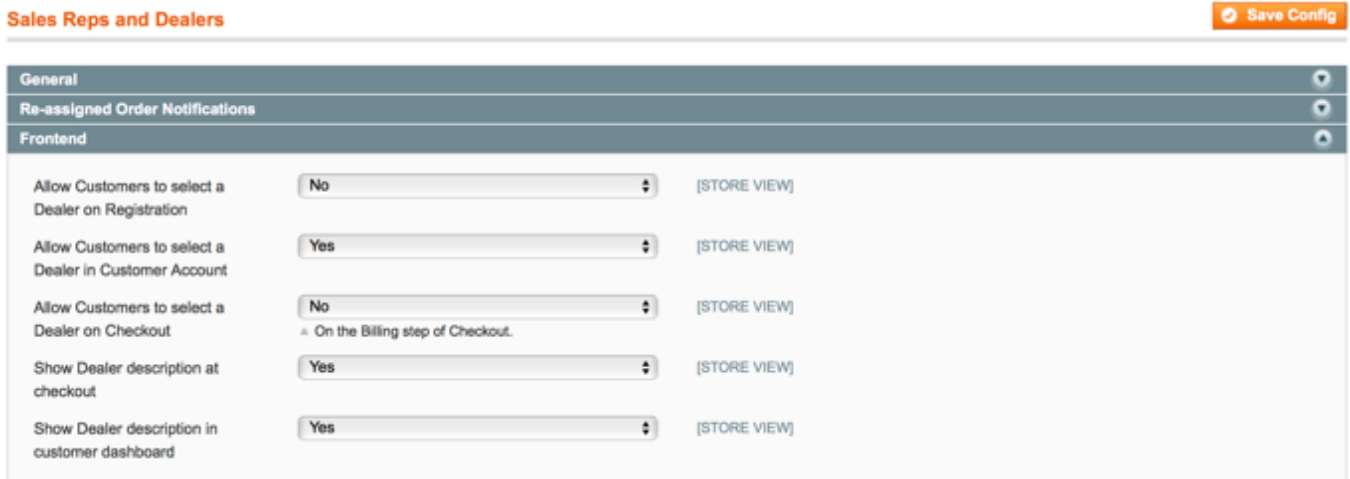
Customer Group * Disable Automatic Group Change Based on VAT ID

Dealer

Prefix

You can also select a dealer for the customer at the **Account information** tab of the **Customer information** page.

Additional extension settings



The screenshot shows the 'Sales Reps and Dealers' configuration page. At the top right, there is a 'Save Config' button. The page is divided into sections: 'General', 'Re-assigned Order Notifications', and 'Frontend'. The 'Frontend' section is active and contains five settings, each with a dropdown menu and a '[STORE VIEW]' link:

Setting	Value	Link
Allow Customers to select a Dealer on Registration	No	[STORE VIEW]
Allow Customers to select a Dealer in Customer Account	Yes	[STORE VIEW]
Allow Customers to select a Dealer on Checkout	No	[STORE VIEW]
Show Dealer description at checkout	Yes	[STORE VIEW]
Show Dealer description in customer dashboard	Yes	[STORE VIEW]

At the **System → Configuration → Sales Reps and Dealers → Frontend** section you can modify the frontend behavior of the extension. Enable or disable the following options to add or remove the appropriate functionality:

- Allow Customers to select a Dealer on Registration;
- Allow Customers to select a Dealer in Customer Account;
- Allow Customers to select a Dealer on Checkout;
- Show Dealer description at checkout;
- Show Dealer description in customer dashboard.

Find out how to install the Sales Reps and Dealers extension via [Composer](#).

From:

<https://stg.amasty.net/docs/> - **Amasty Extensions FAQ**

Permanent link:

https://stg.amasty.net/docs/doku.php?id=magento_1:sales_reps_and_dealers



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