

amasty

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

Guide for Sales Reps and Dealers for Magento 2

Provide better shopping experience with the enhanced customer service. Enable sales reps and dealers, effectively manage them and monitor their activity with this handy module.

- Provide customers with individual dealers
- Allow shoppers to select their dealers
- Equip frontend pages with dealer's information
- Check orders assigned to each dealer
- Utilize convenient email notification tool

Extension Configuration

To configure the extension, please go to **Stores → Configuration → Amasty Extensions → Sales Reps and Dealers**.

General

Default Dealer [global]	Frank Wilson	▼	All new orders will be assigned to this dealer except if a specific customer is already assigned to another dealer.
Send New Order Email to the Dealer [global]	Yes	▼	Indicate `Yes` to send a copy of the order email to the associated dealer.
Show Re-assign Fields [global]	Yes	▼	On the order view page in Backend.
Show From To [global]	Yes	▼	From whom to whom re-assigned order.
Show Author of Message [global]	Yes	▼	
Hide the `Manage Customers` tab [global]	No	▼	On the `Edit User` page (the `Edit Dealer` page).
Allow dealers to see all customers and orders [global]	No	▼	Indicate `Yes` to allow dealers to see all customers and orders in the system

Default Dealer — choose a dealer that will be assigned to all new customers by default;

Send New Order Email to the Dealer — choose **Yes** to enable sales reps to assign their orders to other reps;

Show Re-assign Fields — choose to display or hide the re-assigned fields in the backend;

Show From To — show or hide from whom to whom the order is re-assigned;

Show Author of Message — enable or disable the author of message display;

Hide the 'Manage Customers' tab — show or hide the **Edit User** page.

Allow dealers to see all customers and orders - indicate **Yes** to allow dealers to see all customers and orders in the system.

Then, please proceed to the **Re-assigned Order Notifications** section.

Re-assigned Order Notifications

Send Emails
[global]

Indicate `Yes` to send a notification about re-assigned order to the new and old dealers.

Dealer Can Assign Order to Other Dealers
[global]

Indicate `No` if you want dealer to assign orders to the store administrator only.

Admin Name
[global]

If an order assigned from a dealer to the store admin, email will be sent to this name.

Admin Email
[global]

If an order assigned from a dealer to the store admin, email will be sent to this address.

Email Sender
[store view]

Email Template
[store view]

Email template chosen based on theme fallback when "Default" option is selected.

Send Emails — enable this option to send notifications to both new and old dealers once an order is reassigned;

Dealer Can Assign Order to Other Dealers — choose **No** in this field and the dealer will be able to assign orders only to the store admins. If you choose **Yes** the dealer will be able to assign orders to other dealers;

Admin Name — specify the admin name that will receive an email notification;

Admin Email — when an order was re-assigned the assignee gets a notification to this email;

Email Sender — select the email sender;

Email Template — define the email template.

Next, expand the **Frontend** section.

Frontend

Allow Customers to select a Dealer on Registration <small>[store view]</small>	Yes	▼
Allow Customers to select a Dealer in Customer Account <small>[store view]</small>	Yes	▼
Show Dealer description at checkout <small>[store view]</small>	Yes	▼
Show Dealer description in customer dashboard <small>[store view]</small>	Yes	▼

Allow Customers to select a Dealer on Registration — enable or disable the customer's ability to select dealers on registration;

Allow Customers to select a Dealer in Customer Account — allow or disallow customers to select a dealer in their account;

Show Dealer description at checkout — enable this option to show dealer's description at checkout page;

Show Dealer description in customer dashboard — enable this option to show dealer's description in the customer's dashboard.

Creating Dealer Role

To create a user role for sales reps and/or dealers please go to **System → User Roles** and click the **Add New Role** button.

ROLE INFORMATION

Role Information

Role Name * Dealer

Current User Identity Verification

Your Password *

Fill in the **Role Name** and switch to the **Role Resources** tab.

ROLE INFORMATION

Role Info

Role Resources

Role Users

Amasty: Sales Reps and Dealers

Roles Resources

Resource Access Custom

Resources

- Dashboard
- Sales
 - Operations
 - Orders
 - Actions
 - Create
 - View
 - Send Order Email
 - Reorder
 - Edit
 - Cancel
 - Accept or Deny Payment
 - Capture
 - Invoice
 - Credit Memos
 - Hold
 - Unhold
 - Ship
 - Comment
 - Send Sales Emails
 - Invoices
 - Shipments
 - Credit Memos
 - Billing Agreements
 - Actions
 - View
 - Manage
 - Place Order Using Billing Agreements

When specifying the role resources, please be aware that the 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 but they will not be restricted.

Also, you may need to give dealers the access to **Stores → Settings → Configuration → Two Factor Auth** and **System → Permissions → Two Factor Auth** in cases when a dealer can't log in to the admin panel. If the access is given and dealers try to log in, they will get an email about the two-factor authentication configuring. After the configuration, they can log in successfully. Read more about the solutions in this case [here](#).

Role Users

Search [Reset Filter](#) 5 records found 20 per page 1 of 1

<input type="checkbox"/>	User ID	User Name	First Name	Last Name	Email	Status
<input type="checkbox"/>	1	admin	admin	admin	admin@example.com	Active
<input type="checkbox"/>	2	demouser	demouser	demouser	demouser@example.com	Active
<input checked="" type="checkbox"/>	3	dealer	Frank	Wilson	wilson@example.com	Active
<input checked="" type="checkbox"/>	4	sales rep	Lisa	Jones	jones@example.com	Active
<input checked="" type="checkbox"/>	5	sales representative	Loren	Holmes	holmes@example.com	Active

At the **Role Users** tab you can select users to assign this role to.

Amasty: Sales Reps and Dealers

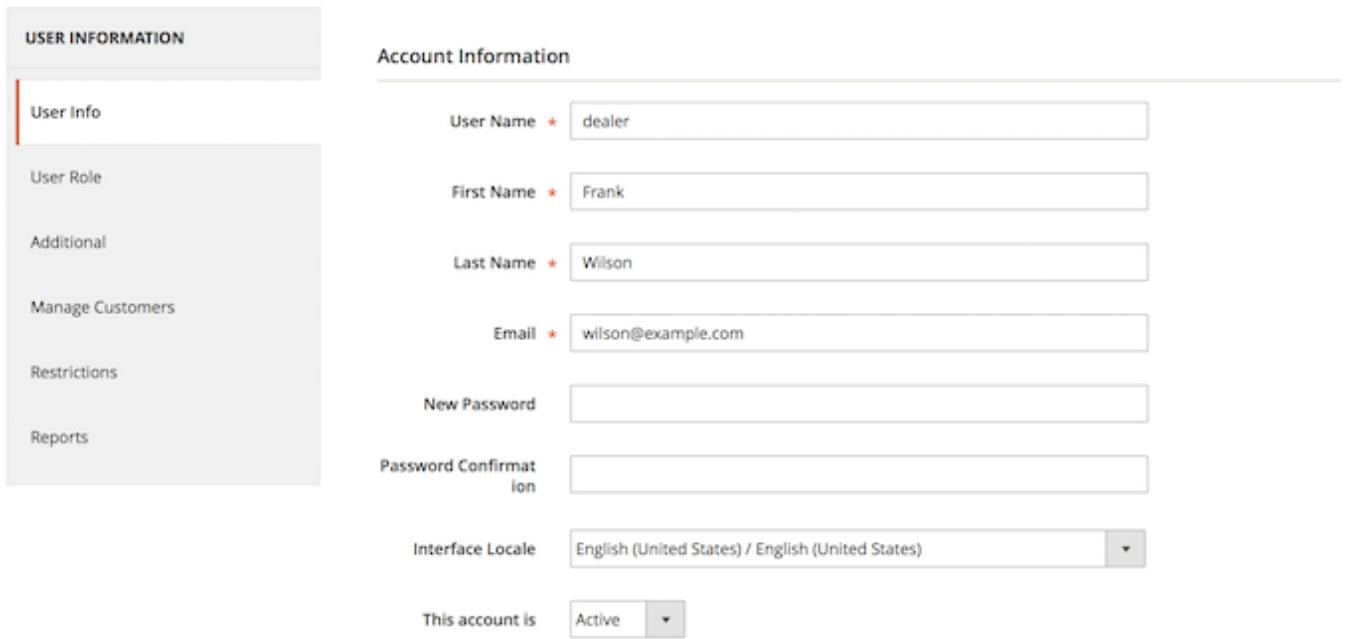
Is Dealer

Restrictions for viewing customers and orders will be applied for this role only.

At the **Amasty Sales Reps and Dealers** tab you can choose **Yes** to apply the dealer role restrictions to the user.

Creating Dealer User

Please go to **System → All Users** and click the **Add New User** button to create a user for the dealer role.



USER INFORMATION

- User Info
- User Role
- Additional
- Manage Customers
- Restrictions
- Reports

Account Information

User Name *

First Name *

Last Name *

Email *

New Password

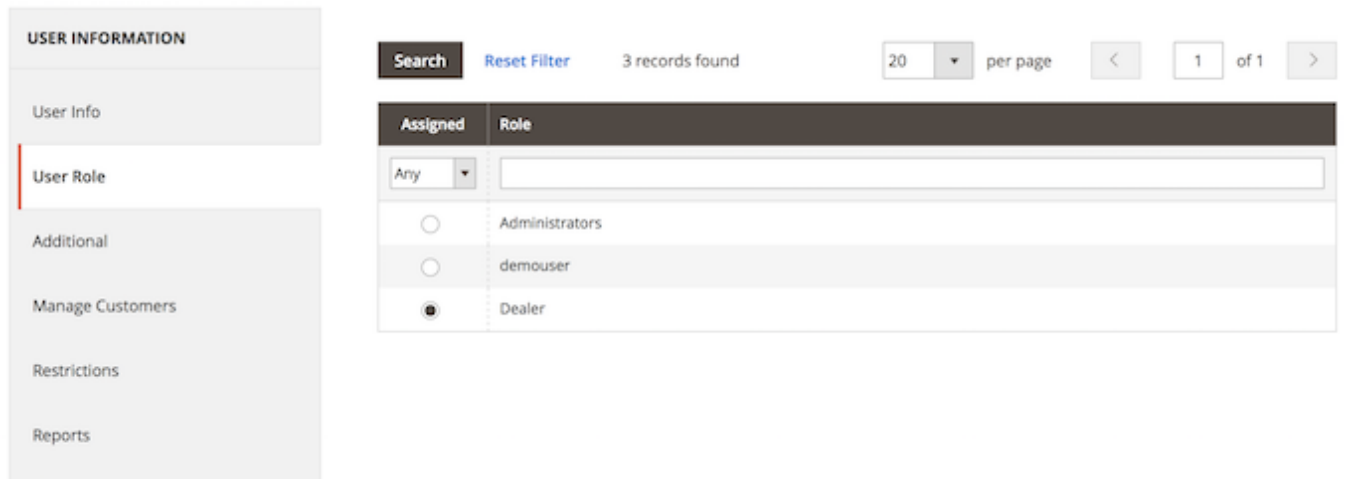
Password Confirmation

Interface Locale

This account is

At the **User Info** tab please specify the user details:

- User Name
- First Name
- Last Name
- Email



USER INFORMATION

- User Info
- User Role
- Additional
- Manage Customers
- Restrictions
- Reports

Search [Reset Filter](#) 3 records found 20 per page 1 of 1

Assigned	Role
<input type="text" value="Any"/>	<input type="radio"/> Administrators
	<input type="radio"/> demouser
	<input checked="" type="radio"/> Dealer

Then, switch to the **User Role** tab and select the corresponding dealer role that you created on the previous step.

USER INFORMATION

- User Info
- User Role
- Additional**
- Manage Customers
- Restrictions
- Reports

Additional Information

Dealer Description

Dealer
Name: Frank Wilson
City: Miami
e-mail: wilson@example.com
Frank is glad to offer a helping hand and improve your shopping experience.

Path: p = span = strong

At the **Additional** tab you can specify more info about the dealer/sales rep. This data 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 store admin user.

USER INFORMATION

- User Info
- User Role
- Additional
- Manage Customers**
- Restrictions
- Reports

Customers

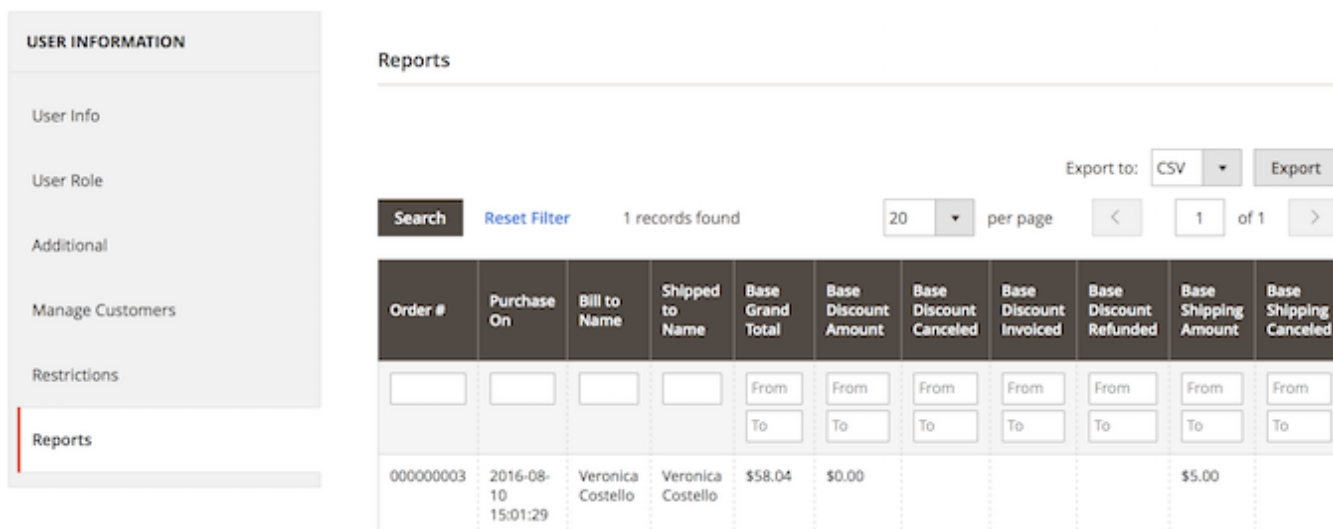
4 records found 20 per page 1 of 1

<input type="checkbox"/>	First Name	Last Name	Email	Status
<input type="checkbox"/>	Veronica	Costello	roni_cost@example.com	Active
<input checked="" type="checkbox"/>	Ray	Liam	ray.liam@example.com	Active
<input checked="" type="checkbox"/>	Destin	Blake	blake@example.com	Active
<input type="checkbox"/>	advanced	ideas	remus.munteanu@advancedideas.ro	Active

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



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.



At the **Reports** tab you can view all orders assigned to this dealer.

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 completed orders.

Emails Customization

To create specific emails with the required information, you can use the built-in email template **Dealer Assign**.

New Template

← Back Reset Convert to Plain Text Preview Template **Save Template**

Load Default Template

Template *


Template Information

Template Name *

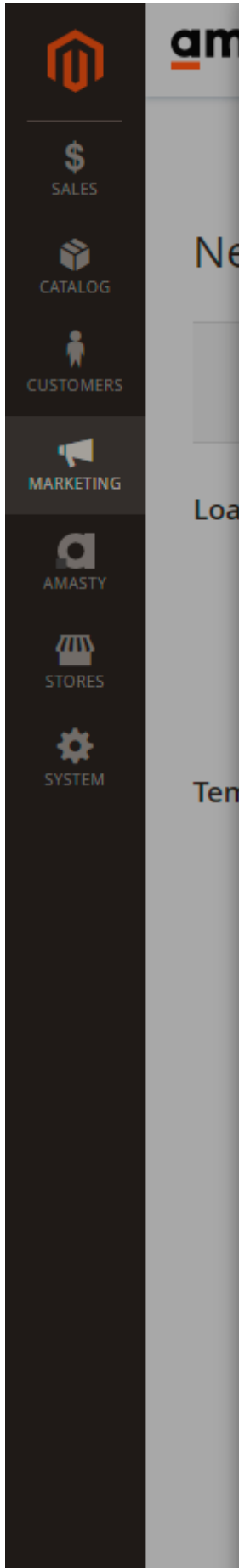
Template Subject *

Template Content *

- Amasty_Perm**
 - Dealer Assign
- Amazon_Payment**
 - Hard-declined Authorization
 - Soft-declined Authorization
- Magento_Checkout**
 - Payment Failed
- Magento_Contact**
 - Contact Form
- Magento_Customer**
 - Change Email
 - Change Email and Password
 - Forgot Password
 - New Account
 - New Account (Magento/luma)
 - New Account Confirmation Key
 - New Account Confirmed
 - New Account Without Password
- Magento_Directory**
 - Remind Password
 - Reset Password



Also, you can include dealer info in any order emails by adding the **Dealer Contact Name** variable.



Insert Variable...

Web

- Base URL
- Secure Base URL

Store Email Addresses / General Contact

- Sender Name
- Sender Email

Store Email Addresses / Sales Representative

- Sender Name
- Sender Email

Store Email Addresses / Customer Support

- Sender Name
- Sender Email

Store Email Addresses / Custom Email 1

- Sender Name
- Sender Email

Store Email Addresses / Custom Email 2

- Sender Name
- Sender Email

General / Store Information

- Store Name
- Store Phone Number
- Store Hours of Operation
- Country
- Region/State
- ZIP/Postal Code
- City
- Street Address
- Street Address Line 2
- VAT Number

Template Variables

- Customer Account URL
- Customer Name
- Order Comment
- Order Id
- Order Status
- Store Frontend Name
- Store Email
- Store Phone
- Store Hours
- Dealer Contact Name



Sorting and Filtering Orders by Dealer

Orders

demouser

Create New Order

Search by keyword

Filters Default View Columns Export

Actions 3 records found 20 per page 1 of 1

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Dealers	Action
<input type="checkbox"/> 000000003	Main Website Main Website Store Default Store View	Aug 10, 2016, 15:08:00 PM	Veronica Costello	Veronica Costello	\$58.04	\$58.04	Pending	Frank Wilson	View
<input type="checkbox"/> 000000002	Main Website Main Website Store Default Store View	Jun 24, 2016, 7:06:00 AM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete		View
<input type="checkbox"/> 000000001	Main Website Main Website Store Default Store View	Jun 24, 2016, 7:06:00 AM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing		View

Navigate to **Sales** → **Orders**. Here is the list of all placed orders that the main admin can see. The **Dealers** column is added to the grid, so the main admin can see which orders are assigned to what dealers, filter and sort orders by dealers.

Assigning Dealers for Orders

The screenshot shows the 'ORDER VIEW' interface. On the left is a sidebar menu with the following items: Information, Invoices, Credit Memos, Shipments, Comments History, and Assign Dealer (which is highlighted with a red vertical bar). The main content area is titled 'Assign Dealer'. It features a 'Dealer' dropdown menu currently showing 'Frank Wilson'. Below this is a 'Comment' text area. There is a checkbox labeled 'Notify Dealer by Email' which is currently unchecked. At the bottom of the main content area is a dark button labeled 'Submit Comment'.

To assign an order to a dealer please open Sales → Orders and edit a particular order. At the **Assign Dealer** tab you can select who will work on the order.

You can fill in the **Comment** field when assigning a dealer.

Managing Orders as a Dealer

On the **Orders Grid** dealer can see only the orders assigned to him or her by the admin user or a customer.

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

When a dealer is trying to create an order for any assigned customer he or she will be able to specify only the customer group selected by the store administrator.

Selecting a Dealer as a Customer

Choose a Dealer

Dealer

Frank Wilson



Create an Account

Customers can select a dealer during the registration process.

Also, customer can choose a dealer to work with.

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_2:sales_reps_and_dealers



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