

Sales Rep

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Overview

A Sales Rep is used to categorize sales by a Sales Person or Customer Service Representative (CSR).

Assigning Sales Reps

1. A Sales Rep must be first assigned to either a **Vendor** or an **Employee** or Other Name. Once added, you select it as the Name of the Sales Rep from the drop down menu.
2. This will cause the **Initials** field to automatically generate. If you would like to assign the Rep your own Initials, feel free to click the **Initials** field and change it as desired.
3. Select if the Sales Rep is **Active**.

The screenshot shows the OrderTime web interface for configuring a Sales Rep. The top navigation bar includes Home, Sales, Purchasing, Production, Warehouse, and Reports. The breadcrumb trail is Admin > Profile Lists > Sales Rep. The page title is 'Sales Rep' with 'Save' and 'Reset' buttons. On the left, there is a sidebar with 'Active Status' (Active, Inactive, Both) and a list of records with green status icons. The main form area contains fields for Name (a dropdown menu), Initials, Active (checked), Rate, IsReg (unchecked), and Code.

To access the Sales Rep setting:

1. Click on the **Gear** icon on the top right of the screen.
2. Under **General** category, click **Profile List**.

The screenshot shows the OrderTime Admin settings page. The top navigation bar includes Purchasing, Production, Warehouse, and Reports. The user is logged in as 'Project021'. The 'Admin' section is expanded, showing three categories: 'General', 'Settings', and 'Users & Roles'. Under 'General', the 'Profile Lists' option is highlighted with a red box. Under 'Settings', there are options for Company Info, Company Preferences, Custom Fields, Page Layouts, Email Templates, and Form Templates. Under 'Users & Roles', there are options for Roles, Users, and Billing and Subscription.

3. Under the **Sales** category, click **Sales Rep**.

Admin > Profile Lists

Profile Lists

- General
 - Activity Status
 - Activity Type
 - Item Group
 - Units of Measure
 - UOM Sets
 - Account
 - Manufacturers
 - Class
 - Currencies
 - FOB
- Sales**
 - Customer Types
 - Lead Statuses
 - Sales Tax Codes
 - Item Sales Tax
 - Payment Methods
 - Sales Rep**
 - Discount
 - Custom Messages
 - Price Levels
 - Payment Gateway
- Production
 - Steps
- Shipping
 - Ship Method
 - Package Type
 - Shipping Carrier Account

4. If you have set up *ANY* Custom Fields, they will appear under the Sales Rep Active selection box. Enter the information into the Custom Fields, as required. Click **Save** when you are done.

Admin > Profile Lists > Sales Rep

Sales Rep

Active Status: Active Inactive Both

Records:

Service Provider 1

Name:

Initials:

Active: