Sales Rep

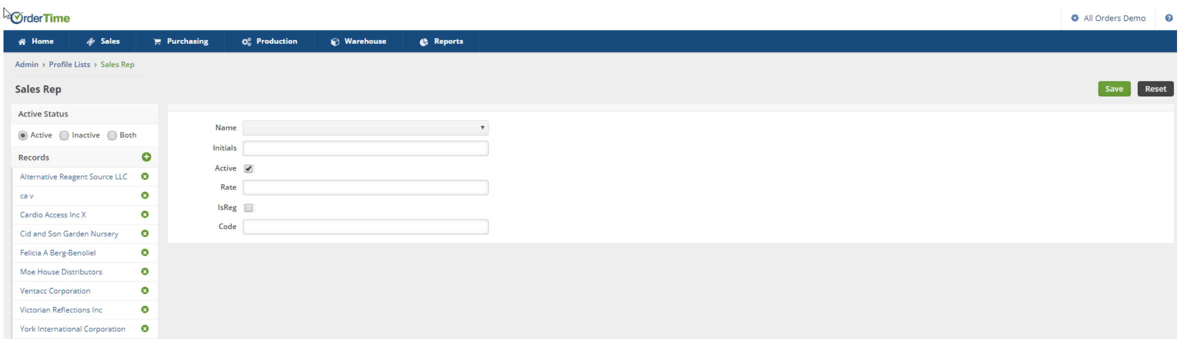
Last Modified on 01/26/2023 9:50 am EST

Overview

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

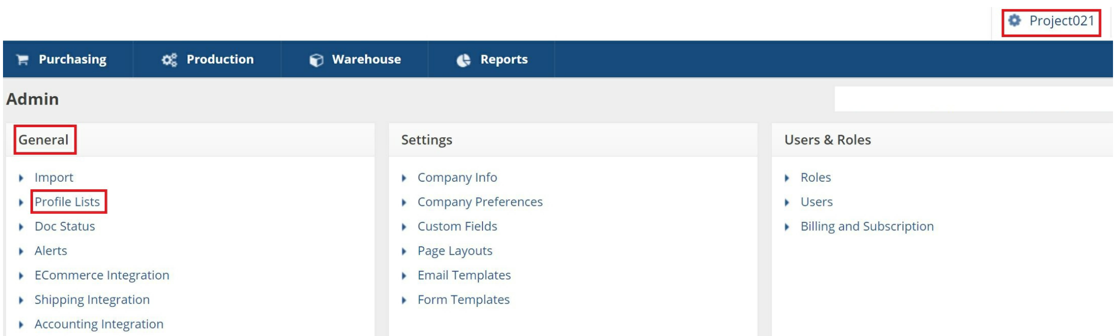
Assigning Sales Reps

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**.

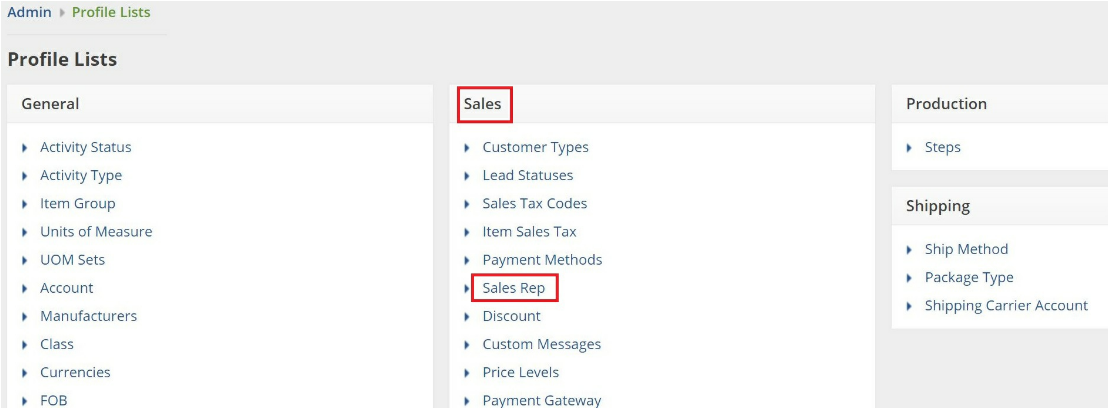


To access the Sales Rep setting:

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



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



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.