

# Assigning Sales Rep to Customer by Address

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## Overview:

You have the ability to attach a Sales Rep to a Customers Address. This way if you have multiple addresses for a customer you can have a Sales Rep responsible for each.

## Solution:

To add a Sales Rep to a Customers Address you will open the Customer Profile and select the Address Tab. On the Address Tab Edit the Address.

The screenshot shows the 'Customer - Hansen Training' profile page. The 'Addresses' tab is selected and highlighted with a red box. Below the tabs is a table of addresses:

NAME	STREET	CITY	STATE/PROV./REG.	CONTACT	EMAIL	PHONE	SALES REP	ADDRESS ID	ACTIONS
Primary	4006 Jack James RD	Stuart	FL	888.651.3545			Jim Sales		<a href="#">Edit</a> <a href="#">Delete</a>
Secondary	123 apple st	hobe sound	FL						<a href="#">Edit</a> <a href="#">Delete</a>

Total Records: 2

Then you will switch to the Other tab and set your Sales Rep. Then select Save.

The screenshot shows the 'Add / Edit Address' dialog box overlaid on the customer profile page. The 'Other' tab is selected and highlighted with a red box. The 'Sales Rep' dropdown menu is also highlighted with a red box. The dialog box contains the following fields:

- Name: Secondary (dropdown)
- Is Primary:
- Active:
- Address: Other (selected), Custom (dropdown)
- Contact:
- Alt. Contact:
- Phone:
- Alt. Phone:
- Fax:
- Email:
- Website:
- Tax Code: Tax (dropdown)
- Tax Item: FL (dropdown)
- Location:
- Sales Rep:

Buttons: Save, Cancel

