Assigning Sales Rep to Customer by Address

Last Modified on 08/13/2021 1:28 pm EDT

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.

Sales > Customers > Custo	omer							Created B	y Jason Swan 11/3/2020 2:51 PM Mi	odified By Jason Swan 2/25/2021 2:29 PM		
Customer - Hansen		MERGE										
General		Primary Ship Address			Bill Address				Other			
Company Hanser Primary Contact Hanser Email Website	n Training n	HANSEN TRAINING 4005 JACK JAMES RD STUART, FL 34997 UNITED STATES			HANSEN TRAINING 333 MEADOW ST STUART, FL 194966 UNITED STATES				Price Level Terms Type Retail Sales Rep Jim Sales			
Note Edit												
Sales Order Addr	resses Ship Docs/Returns Quote	es Contacts Att	achments Custom	Open Activitie	Activity History	Items Sold	Carts	Purchase Orde	ers Payments/Refunds	Internal Notes		
* 0 2										O Add		
NAME ^	STREET	СІТҮ	STATE/PROV./REG.	co	NTACT	EMAIL	PHONE	SALES RE	P ADDRESS ID	ACTIONS		
Primary	4006 Jack James RD	Stuart	FL 88		8.651.3545			Jim Sales		C 0		
Secondary	123 apple st	hobe sound	FL	Total Rev	ords: 2					8		

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

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Create New -	Sales + Customer	s → Customer									Created By Jaso	n Swan 11/3/2020 2:51 PM N	Aodified By Jason Swan	2/25/2021 2
Open Full List	Customer - H	ansen Training	EDIT	CHECK CREDIT LIMIT	MERGE									
Recent Records	General Primary Ship Address Bill Address								ddress		Othe	er		
A Hansen Training	Company Hansen Training Primary Contact Hansen Email			Add / Edit Address ×						×	Price Level Terms Type Retail			
Dean Zanetti CR-0002	Website		_	Na	me Secon	ndary	Is Primary		Active 🗹			Sales Rep Jim Sales		
	Note Edit			Address	Other	Custom								
£ 130	Sales Order	Addresses	Ship Do		Contact						Purchase Orders	Payments/Refunds	Internal Notes	
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	NAME ^	STREET			Alt. Phone						SALES REP	ADDRESS ID	A	CTIONS
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	Secondary	123 ap;	ole st		Email								G	30
					Website									
					Tax Code	Tax		*						
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