HOW TO CREATE SALES REPS

Sales reps are an important part of the revenue stream for many businesses. AdvancePro has built in sales rep tools allowing you to track sales and commissions for your reps. AdvancePro also offers a sales rep web portal, allowing your reps to present products and book sales while visiting client sites.

Creating Sales Reps

1. Click on "Sales Reps > Add New Sales Rep"

2. Enter the sales rep information

a. "Sales Rep Name" is the only required field
b. Select the "Email Customer Order/Modification" checkbox to send the sales rep an email when their customers make or modify orders
c. If you use QuickBooks®, indicate whether the sales rep is an employee or a vendor. AdvancePro will export to QuickBooks as specified. You can also re-export this sales rep to QuickBooks if anything changed.
d. Assign a commission rate to your sales rep.
   i. Commission On Order Total Amount calculates the commission based on the customer order total. (For example, 10% of a $100 sale would result in $100*0.10=$10 commission for the sales rep)
   ii. Commission on Order Total Commission calculates the commission based on the commission. (for example, 10% of a $100 sale would result in $100*0.10*0.10=$1.00

3. Click "Save & Next" to access the "Assign Customers" screen and assign customers to the sales rep

4. If you have an AdvancePro Sales Rep Portal, click "Save & Next" to access the "Login Info" tab, from which you can create login credentials for your sales reps.

You can also:

      a.   Select "Enable as B2B Sales Rep" to allow this rep to access the web portal

      b.   Allow the sales rep to change prices on the web

Sales Rep Portal

1. Click on "Web > Sales Reps > Sales Rep Settings"
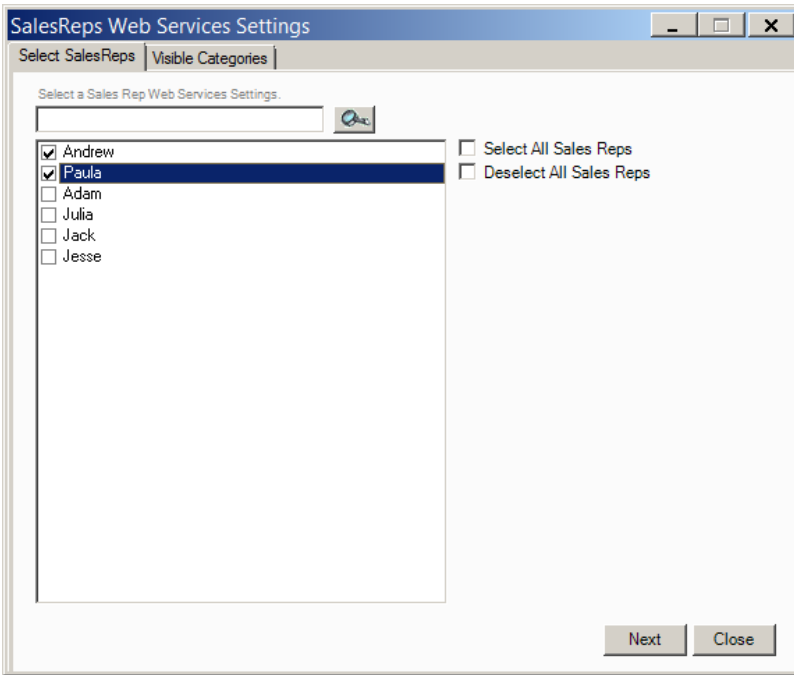
2.   Select the sales rep or reps that you would like to create web settings for

2.   After clicking "Next", you can specify which categories of product the sales rep can access on the web portal. Click "Save & Close"