

# 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"



## Sales Reps

Sales Rep Info	EDI & Sales Reports
Add New Sales Rep	Sales Reports
Edit Sales Rep	
View All Sales Reps	

2. Enter the sales rep information

SalesRep: Watson, Andrew

Sales Rep Info | Assign Customers | Login Info

Edit Sales Rep details  Sales Rep is Inactive

Sales Rep Name: Andrew Watson  
Mr/Ms/... First Name M.I. Last Name

Company/Branch Name: Great Gift  Email Customer Order/Modification

Date of Birth: 7/ 1/1990

**Company Info**

Phone: 800 970-9071 Cell Phone:   
Code Number Ext.

Fax:   
Code Number Ext. Email: awatson@greatgift.ca

Address: 1661 Flint Rd

City: Toronto

State: N/A State Other: ON

Zip Code: M3J 2W8 Country: Canada

**QuickBooks Settings**

Re-Export to QB

Select Sales Rep Type:  
 Employee  
 Vendor

QB Initials: AW

**Additional Information**

Notes:   
Commission %: 10  
 None  
 Commission On Order Total Amount  
 Commission On Order Total Commission

Save & Close Save & Next Close

- 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

The screenshot shows a software window titled "SalesRep: Watson, Andrew". It has three tabs: "Sales Rep Info", "Assign Customers", and "Login Info". The "Assign Customers" tab is active. Below the tabs, there is a text prompt: "Select all Customers you wish to associate to this Sales Rep." Underneath, there is a section titled "Associate Customers" with a search box and a magnifying glass icon. Below the search box, there are two buttons: "Select All" and "De-Select All". A list of customers follows, each with a checkbox:

- Babas Electronics
- BUYCO
- Demo Customer1
- Demo Customer2
- Demo Customer3
- Demo Customer4
- Demo Customer5
- Elaine Bennett
- H.E. Pennypacker
- Jerry Seinfeld
- Kel Varnson
- POS Customer

At the bottom of the window, there are three buttons: "Save & Close", "Save & Next", and "Close".

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.

SalesRep: Watson, Andrew

Sales Rep Info | Assign Customers | Login Info

NOTE: for web use only

**Login Information**

Username

Password

Re enter Password

Enable as B2B SalesRep

Allow to change Price on web

Save Done

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”

### Great Gift Demo

B2B Web Services | B2C Web Services | Sales Reps



# Sales Force Portal

Sales Rep Settings

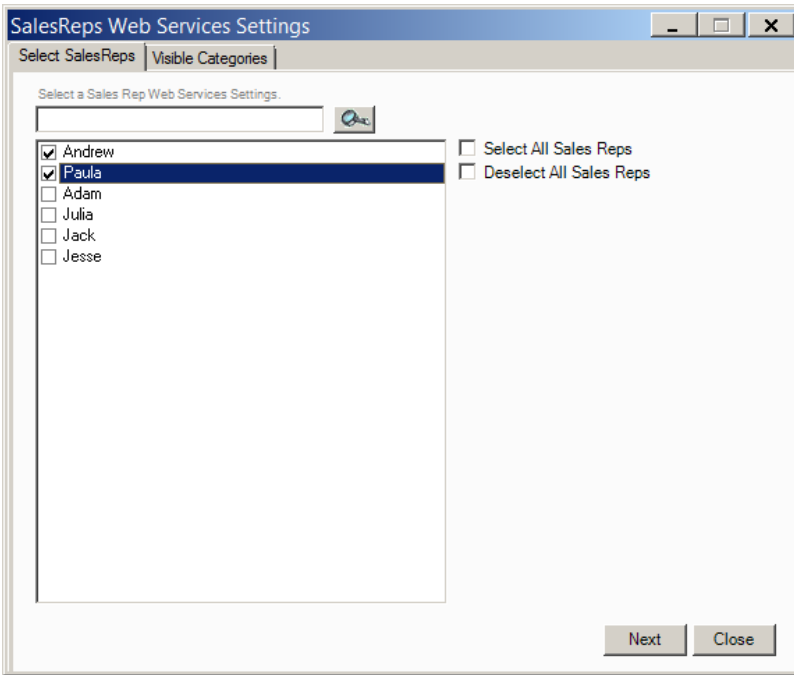


**Synchronize Data**



**Upload Images**

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"

