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For more details see how the Sales Reps and Dealers extension works.

Guide for Sales Reps and Dealers for Magento 2

Provide better shopping experience with the enhanced customer service. Enable sales reps and dealers, effectively manage them and monitor their activity with this handy module.

- Provide customers with individual dealers
- Allow shoppers to select their dealers
- Equip frontend pages with dealer's information
- Check orders assigned to each dealer
- Utilize convenient email notification tool
- Compliance with WCAG 2.2 level AA requirements (for Luma and Hyvä Themes)

Magento 2 Sales Reps and Dealers extension is compatible with **Hyvä Theme** and **Hyvä Checkout**. You can find the **amasty/module-sales-reps-and-dealers-hyva** package for installing in composer suggest (Note: the compatibility is available as a part of an active product subscription or support subscription).
In **Sales Reps and Dealers FAQ** you can find answers to the most popular questions about the extension functionality.

Extension Configuration

To configure the extension, please go to **Stores→ Configuration → Amasty Extensions → Sales Reps and Dealers**.

General

Default Dealer [global]	Frank Wilson ▼
	All new orders will be assigned to this dealer except if a specific customer is already assigned to another dealer.
Send New Order Email to the Dealer [global]	Yes ▼
	Indicate `Yes` to send a copy of the order email to the associated dealer.
Show Re-assign Fields [global]	Yes ▼
	On the order view page in Backend.
Show From To [global]	Yes ▼
	From whom to whom re-assigned order.
Show Author of Message [global]	Yes ▼
Hide the `Manage Customers` tab [global]	No ▼
	On the `Edit User` page (the `Edit Dealer` page).
Allow dealers to see all customers and orders [global]	No ▼
	Indicate `Yes` to allow dealers to see all customers and orders in the system

Default Dealer — choose a dealer that will be assigned to all new customers by default;

Send New Order Email to the Dealer — choose **Yes** to enable sales reps to assign their orders to other reps;

Show Re-assign Fields — choose to display or hide the re-assigned fields in the backend;

Show From To — show or hide from whom to whom the order is re-assigned;

Show Author of Message — enable or disable the author of message display;

Hide the 'Manage Customers' tab — show or hide the **Edit User** page.

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Allow dealers to see all customers and orders - indicate **Yes** to allow dealers to see all customers and orders in the system.

Then, please proceed to the **Re-assigned Order Notifications** section.

Re-assigned Order Notifications

Send Emails [global] — Yes

Indicate `Yes` to send a notification about re-assigned order to the new and old dealers.

Dealer Can Assign Order to Other Dealers [global] — No

Indicate `No` if you want dealer to assign orders to the store administrator only.

Admin Name [global] — Admin

If an order assigned from a dealer to the store admin, email will be sent to this name.

Admin Email [global] — noreply@example.com

If an order assigned from a dealer to the store admin, email will be sent to this address.

Email Sender [store view] — Sales Representative

Email Template [store view] — Dealer Assign (Default)

Email template chosen based on theme fallback when "Default" option is selected.

Send Emails — enable this option to send notifications to both new and old dealers once an order is reassigned;

Dealer Can Assign Order to Other Dealers — choose **No** in this field and the dealer will be able to assign orders only to the store admins. If you choose **Yes** the dealer will be able to assign orders to other dealers;

Admin Name — specify the admin name that will receive an email notification;

Admin Email — when an order was re-assigned the assignee gets a notification to this email;

Email Sender — select the email sender;

Email Template — define the email template.

Next, expand the **Frontend** section.

Allow Customers to select a Dealer on Registration — enable or disable the customer's ability to select dealers on registration;

Allow Customers to select a Dealer in Customer Account — allow or disallow customers to select a dealer in their account;

Show Dealer description at checkout — enable this option to show dealer's description at checkout page;

Show Dealer description in customer dashboard — enable this option to show dealer's description in the customer's dashboard.

Creating Dealer Role

To create a user role for sales reps and/or dealers please go to **System → User Roles** and click the **Add New Role** button.

Fill in the **Role Name** and switch to the **Role Resources** tab.

When specifying the role resources, please be aware that the extension works only for orders and customers and its restrictions apply to 'Orders', 'Invoices', 'Shipments', 'Credit Memos' and 'Customers' sections. You can assign other resources to the role but they will not be restricted.

Also, you may need to give dealers the access to **Stores → Settings → Configuration → Two Factor Auth** and **System → Permissions → Two Factor Auth** in cases when a dealer can't log in to the admin panel. If the access is given and dealers try to log in, they will get an email about the two-factor authentification configuring. After the configuration, they can log in successfully. Read more about the solutions in this case here.

At the **Role Users** tab you can select users to assign this role to.

At the **Amasty Sales Reps and Dealers** tab you can choose **Yes** to apply the dealer role restrictions to the user.

Creating Dealer User

Please go to **System → All Users** and click the **Add New User** button to create a user for the dealer role.

At the **User Info** tab please specify the user details:

- User Name
- First Name
- Last Name
- Email

Then, switch to the **User Role** tab and select the corresponding dealer role that you created on the previous step.

At the **Additional** tab you can specify more info about the dealer/sales rep. This data will be displayed to assigned customers on the checkout page as well as on the customer account page.

This info can be added and edited only by store admin user.

At the **Manage Customers** tab you can assign customers to the dealer. The user will be able to see only these customers on the **Manage Customers** grid, only orders placed by these customers on the order grid, and documents (invoices, shipments, and credit memos) related to orders of these customers.

At the **Restrictions** tab you can assign the user to a particular customer group. By default users are assigned to all customer groups. If you assign a user to a certain group he or she will be able to add customers only to this group.

At the **Reports** tab you can view all orders assigned to this dealer.

It is possible to filter and sort orders on this grid. So, for example, if you pay commissions to sales reps/dealers based on complete orders, you can filter the list to show only completed orders.

Emails Customization

To create specific emails with the required information, you can use the built-in email template **Dealer Assign**.

New Template

← Back   Reset   Convert to Plain Text   Preview Template   **Save Template**

Load Default Template

Template *

Amasty_Perm
  Dealer Assign
Amazon_Payment
  Hard-declined Authorization
  Soft-declined Authorization
Magento_Checkout
  Payment Failed
**Magento_Contact**
  Contact Form
Magento_Customer
  Change Email
  Change Email and Password
  Forgot Password
  New Account
  New Account (Magento/luma)
  New Account Confirmation Key
  New Account Confirmed
  New Account Without Password
  Remind Password
  Reset Password
Magento_Directory

Template Information

Template Name *

Template Subject *

Template Content *

Also, you can include dealer info in any order emails by adding the **Dealer Contact Name** variable.
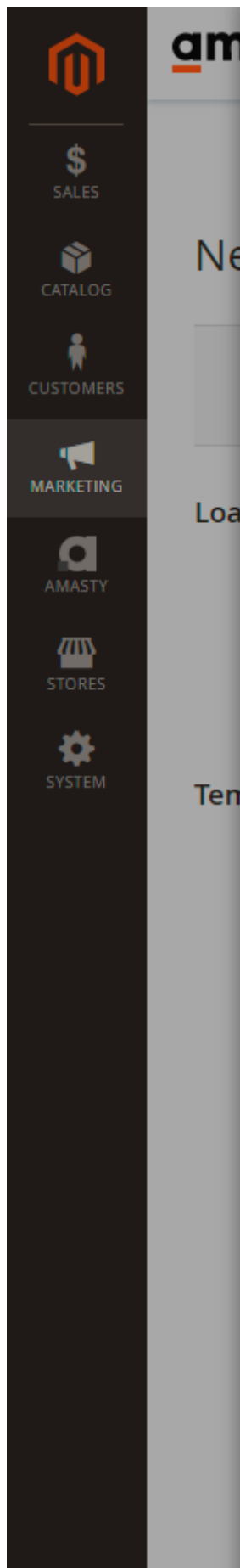
Insert Variable...

Web

Base URL

Secure Base URL

Store Email Addresses / General Contact

Sender Name

Sender Email

Store Email Addresses / Sales Representative

Sender Name

Sender Email

Store Email Addresses / Customer Support

Sender Name

Sender Email

Store Email Addresses / Custom Email 1

Sender Name

Sender Email

Store Email Addresses / Custom Email 2

Sender Name

Sender Email

General / Store Information

Store Name

Store Phone Number

Store Hours of Operation

Country

Region/State

ZIP/Postal Code

City

Street Address

Street Address Line 2

VAT Number

Template Variables

Customer Account URL

Customer Name

Order Comment

Order Id

Order Status

Store Frontend Name

Store Email

Store Phone

Store Hours

Dealer Contact Name

Sorting and Filtering Orders by Dealer

Navigate to **Sales → Orders**. Here is the list of all placed orders that the main admin can see. The **Dealers** column is added to the grid, so the main admin can see which orders are assigned to what dealers, filter and sort orders by dealers.

Assigning Dealers for Orders

To assign an order to a dealer please open Sales → Orders and edit a particular order. At the **Assign Dealer** tab you can select who will work on the order.

You can fill in the **Comment** field when assigning a dealer.

Managing Orders as a Dealer

On the **Orders Grid** dealer can see only the orders assigned to him or her by the admin user or a customer.

When creating an order from the admin panel, sales reps and dealers can only create orders for customers that are assigned to them.

When a dealer is trying to create an order for any assigned customer he or she will be able to specify only the customer group selected by the store administrator.

Selecting a Dealer as a Customer

Choose a Dealer

Dealer

Frank Wilson

Create an Account

Customers can select a dealer during the registration process.

Also, customer can choose a dealer to work with.

Find out how to install the Sales Reps and Dealers extension via Composer.