

Sales Reps and Dealers for Magento 2



Magento Extension User Guide

Official extension page: [Sales Reps and Dealers for Magento 2](#)



User Guide: [Sales Reps and Dealers for Magento 2](#)

Support: <http://amasty.com/contacts/>

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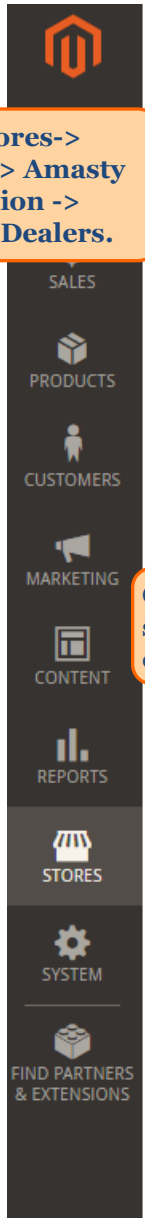
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1. Configure the dealer role

Configuration

Please, go to Stores-> Configuration -> Amasty Extensions section -> Sales Reps and Dealers.



Store View: Default Config ?

GENERAL
CATALOG
CUSTOMERS
ADVANCED
AMASTY EXTENSIONS
Sales Reps and Dealers

General

Choose a dealer that will be assigned to all new customers by default.

Default Dealer: Frank Wilson

All new orders will be assigned to this dealer except if a specific customer is already assigned to another dealer.

Choose 'Yes' to enable sales reps to assign their orders to other reps.

Send New Order Email to the Dealer: Yes

Yes

Indicate 'Yes' to send a copy of the order email to the associated dealer.

Show Re-assign Fields: Yes

Yes

On the order view page in Backend.

Display or hide re-assigned fields on the Backend.

Show From To: Yes

Yes

From whom to whom re-assigned order.

It's possible to show or hide from whom to whom the order is re-assigned.

It's possible to show or hide the 'Edit User' page.

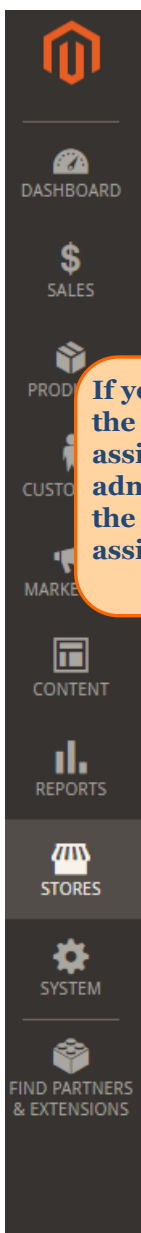
Hide the 'Manage Customers' tab: No

Show Author of Message: Yes

No

On the 'Edit User' page (the 'Edit Dealer' page).





Configuration

1. Configure the dealer role

Store View: Default Config ?

Setup email notifications for reassignment of dealers. Set 'Send Emails' to 'Yes' to send notifications to both new and old dealer once an orders is reassigned.

Re-assigned Order Notifications

If you choose 'No' in this field, 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.

GENERAL

SERVICES

ADVANCED

AMASTY EXTENSIONS

Sales Reps and Dealers

Send Emails Yes

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

Dealer Can Assign Order to Other Dealers No

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

Admin Name Admin

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

Admin Email noreply@example.com

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

When an order was re-assigned the assignee gets a notification to this email.

Email Sender Sales Representative

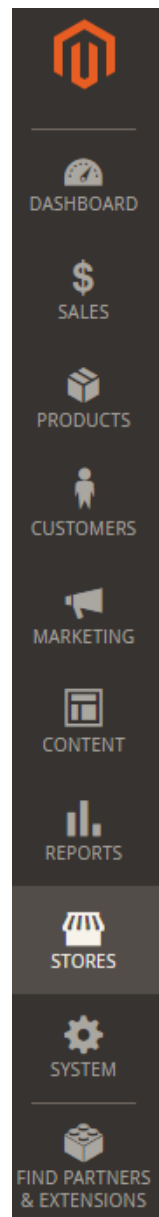
Select email sender and an appropriate notification template.

Email Template Dealer Assign (Default)

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



Configuration



Store View: Default Config ▾ ?

- GENERAL ▾
 - CATALOG ▾
 - CUSTOMERS ▾
 - SALES ▾
 - SERVICES ▾
 - ADVANCED ▾
 - AMASTY EXTENSIONS** ▲
- Sales Reps and Dealers

Specify Frontend options. You can allow customers to select a dealer during the registration as well as in the customer account. Choose where the Dealer description block will be displayed.

Frontend

- Allow Customers to select a Dealer on Registration ▾
- Allow Customers to select a Dealer in Customer Account ▾
- Show Dealer description at checkout ▾
- Show Dealer description in customer dashboard ▾



2. Create a role for sales reps and dealers

Create a user role for sales representatives (and/or dealers)

Roles

admin

Add New Role

Search

Reset Filter

3 records found

20

per

To create a user role for sales reps/dealers please go to System -> User Roles and click 'Add New Role' button.

ID	Role
1	Administrators
3	demouser
5	Dealer



2. Create a role for sales reps and dealers

Dealer

← Back

Delete Role

Reset

Save Role

ROLE INFORMATION

Role Info

Role Resources

Role Users

Amasty: Sales Reps and Dealers

Roles Resources

Resource Access

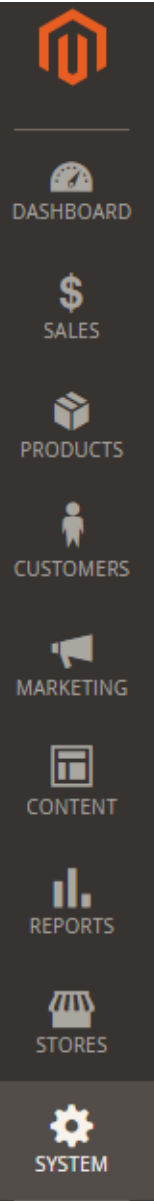
Custom ▼

Resources

- Dashboard
- Sales
- Operations
- Products
- Inventory
- Carts
- Manage carts
- Customers
- Marketing
- Promotions
- Communications
- SEO & Search
- Search Terms
- Site Map
- User Content
- My Account
- Content

When specifying the role resources, please be aware that our 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, however they will not be restricted.



2. Create a role for sales reps and dealers

Dealer admin

← Back Delete Role Reset **Save Role**

ROLE INFORMATION

- Role Info
- Role Resources
- Role Users**
- Amasty: Sales Reps and Dealers

Role Users

Search [Reset Filter](#) 3 records found

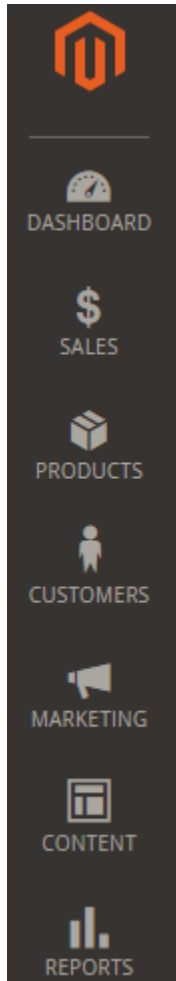
20 per page 1 of 1

<input type="checkbox"/>	User ID ↓	User Name	First Name	Last Name	Email	Status
Any	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	1	admin	admin	admin	admin@example.com	Active
<input type="checkbox"/>	2	demouser	demouser	demouser	demouser@example.com	Active
<input checked="" type="checkbox"/>	3	dealer	Frank	Wilson	wilson@example.com	Active

Specify users for the Dealer role.



2. Create a role for sales reps and dealers



Dealer

← Back Delete Role Reset **Save Role**

ROLE INFORMATION

- Role Info
- Role Resources
- Role Users
- Amasty: Sales Reps and Dealers**

Amasty: Sales Reps and Dealers

Is Dealer

Restrictions for viewing customers and orders will be applied for this role only.

Please choose 'Yes' to apply dealer role restrictions to the user.



3. Create users for the role

Users

After that please go to System -> All Users and click 'Add New User' to create users for the role.

Add New User

Search Reset Filter 5 records found 20 per page 1 of 1

ID	User Name	First Name	Last Name	Email	Status
1	admin	admin	admin	admin@example.com	Active
3	dealer	Frank	Wilson	wilson@example.com	Active
2	sales representative	Loren	Holmes	holmes@example.com	Active
4	sales rep	Lisa	Jones	jones@example.com	Active

- DASHBOARD
- SALES
- PRODUCTS
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES



3. Create users for the role

Frank Wilson

admin

← Back Delete User Reset Force Sign-In **Save User**

Assign the user to the role and click 'Save User'.

USER INFORMATION

User Info

User Role

Additional

Manage Customers

Restrictions

Search

Reset Filter

3 records found

20

per page

<

1

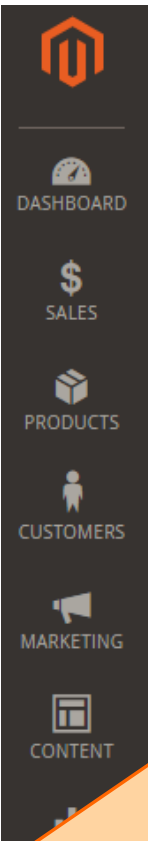
of 1

>

Assigned	Role
Any	
<input type="radio"/>	Administrators
<input type="radio"/>	demouser
<input checked="" type="radio"/>	Dealer



3. Create users for the role



Frank Wilson

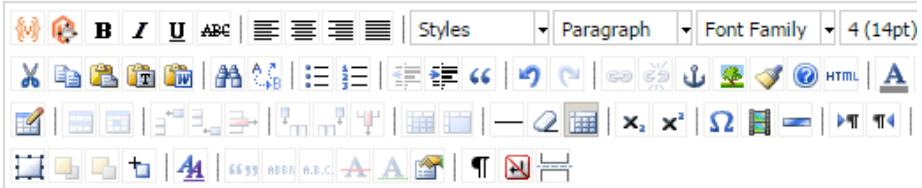
← Back Delete User Reset Force Sign-In **Save**

- USER INFORMATION**
- User Info
- User Role
- Additional**
- Manage Customers

Additional Information

Dealer Description

Show / Hide Editor



Name: Frank
Last Name: Wilson
e-mail: wilson@example.com
 Path: p » span

Send copy of email to

owner@example.com

Comma separated list of email addresses

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.

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



3. Create users for the role

Frank Wilson

- DASHBOARD
- SALES
- PRODUCTS
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES
- SYSTEM

← Back Delete User Reset Force Sign-In **Save User**

- USER INFORMATION
- User Info
- User Role
- Additional
- Manage Customers**
- Reports

At the 'Manage Customers' tab you can assign customers to the dealer.

Customers

Search [Reset Filter](#)

The user will be able to see only these customers on 'Manage Customers' grid, only orders placed by these customers on order grid and documents (invoices, shipments and credit memos) related to orders of these customers.

2 records found

<input type="checkbox"/>	First Name	Last Name	Email	Status
Any ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Lara	Midsen	Lara@example.com	Active
<input type="checkbox"/>	Kate	May	kate_may@example.com	Active



3. Create users for the role

Frank Wilson


← Back Delete User Reset Force Sign-In **Save User**

USER INFORMATION

User Info

User Role

Additional

Restrictions 

At the 'Restrictions' tab you can assign the user to a particular customer group.

Restrictions

Allowed Customer Group

General
Wholesale
Retailer

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.

Leave empty or select all to use any group.
The dealer can select from the groups above when creates a customer or an order.



DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM



3. Create users for the role

Frank Wilson

← Back Delete User Reset Force Sign-In

- DASHBOARD
- SALES
- PRODUCTS
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES
- SYSTEM
- FIND PARTNERS & EXTENSIONS

- USER INFORMATION
- User Info
- User Role
- Additional
- Manage Customers
- Restrictions
- Reports

Reports

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 complete orders.

Search Reset Filter

CSV

1 of 1

Bill to Name	Shipped to Name	Base Grand Total	Base Discount Amount	Base Discount Canceled	Base Discount Invoiced	Base Discount Refunded	Base Shipping Amount
<input type="text"/>	<input type="text"/>	From To	From To	From To	From To	From To	From To
John Nelson	John Nelson	\$41.00	\$0.00	\$0.00			\$5.00
John Nelson	John Nelson	\$41.00	\$0.00		\$0.00		\$5.00
Lena May	Lena May	\$77.00	\$0.00				\$0.00

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



4. Sort and filter order by dealers

Orders

Create New Order

This is the list of all placed orders that the main admin can see. '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

<input type="checkbox"/>	ID	↑	Purchase Point	Ship-to Name	Grand Total (Base)	Status	Action	Dealers
<input type="checkbox"/>	000000005		Main Website Main Website Store Default Store View	John Nelson	\$41.00	Pending	View	Frank Wilson
<input type="checkbox"/>	000000004		Main Website Main Website Store Default Store View	John Nelson	\$41.00	Canceled	View	Lara Midsen
<input type="checkbox"/>	000000003		Main Website Main Website Store Default Store View	John Nelson	\$41.00	Canceled	View	Frank Wilson
<input type="checkbox"/>	000000002		Main Website Main Website Store Default Store View	Veronica Costello	\$37.00	Complete	View	Lara Midsen
<input type="checkbox"/>	000000001		Main Website Main Website Store Default Store View	Veronica Costello	\$34.00	Processing	View	Frank Wilson



5. Assign dealers for orders

#000000003

← Back Cancel Send Email Hold Invoice Ship **Edit**

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Assign Dealer**

Dealer

Frank Wilson ▼

To assign the order to dealer please, open Sales->Orders and edit a particular order. On the 'Assign Dealer' tab you can select who will work on the order.

Comment

Please, consider this order.

One can write a comment when assigning the order.

Notify Dealer by Email

Submit Comment

- DASHBOARD
- SALES**
- PRODUCTS
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES
- SYSTEM



6. Dealers can see only orders assigned to them

Let's log in as a 'dealer'.

Orders

dealer

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

Create New Order

Search by keyword



Filters



Default View



Columns



Export

Select Items

3 records found

20

per page



1

of 1



<input type="checkbox"/>	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
<input type="checkbox"/>	000000004	Main Website Main Website Store Default Store View	Jul 18, 2016 11:53:33 AM	Ray Liam	Ray Liam	\$77.00	\$77.00	Pending	View
<input type="checkbox"/>	000000003-2	Main Website Main Website Store Default Store View	Jul 18, 2016 8:51:48 AM	Veronica Costello	Veronica Costello	\$41.00	\$41.00	Processing	View



7. Dealers place admin orders only for their customers

Create New Order in Default Store View

dealer

← Back

Please select a customer

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

Create New Customer

Search

Reset Filter

3 records found

20

per page

<

1

of 1

>

ID	Name	Email	Phone	ZIP/Post Code	Country	State/Province	Signed-up Point
					All Countries		
2	Ray Liam	ray.liam@example.com	516-375-9078	78690	United States	Texas	Default Store View
1	Veronica Costello	roni_cost@example.com	(555) 229-3326	49628-7978	United States	Michigan	Default Store View



7. Dealers place admin orders only for their customers

Create New Order for Frank Wilson (Dealer)

 dealer

Cancel

Submit Order

Items Ordered

Add Products

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Erika Running Short	\$45.00 <input type="checkbox"/> Custom Price*	1	\$45.00	\$0.00 <input checked="" type="checkbox"/> Apply	\$45.00	
SKU: WSH12-28-Green						
<input type="button" value="Configure"/>						
Total 1 product(s)		Subtotal:	\$45.00	\$0.00	\$45.00	

* - Enter custom price excluding tax

Account Information

* Group

Email

General ▲
Retailer

When being logged in as a 'dealer' you want to create the order for any customer assigned to you, you'll be able to specify only the customer group selected by the store administrator (see page 14).



8. Allow customers to select a dealer

First Name *

John

Last Name *

Doe

Email *

doe@example.com

Sign Up for Newsletter

Sign-in Information

Allow customers to select a dealer during the registration process.

Password *

.....

Confirm Password *

.....

Choose a Dealer

Dealer

Frank Wilson

Create an Account



8. Allow customers to select a dealer

Edit Dealer

Choose a Dealer

Dealer

Frank Wilson

Save

Customer can choose a dealer to work with.

Your Dealer Info

Dealer

Name: Frank Wilson

City: Miami

e-mail: wilson@example.com

Frank is glad to offer a helping hand and improve your shopping experience.

See the example of dealer information displayed on the frontend to the corresponding customers.



Thank you!

Should you have any questions or feature suggestions, please contact us at:

<http://amasty.com/contacts/>

Your feedback is absolutely welcome!

