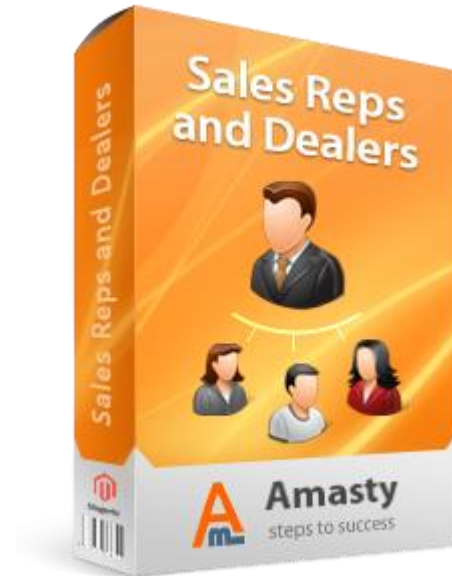


Sales Reps and Dealers



Magento Extension User Guide

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



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

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

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1. Create a role for sales reps and dealers

First of all it is needed to create a user role for sales representatives (and/or dealers)

The screenshot shows the Magento admin panel navigation menu. The 'System' menu is expanded, showing various options. The 'Add New Role' button is highlighted in orange. Below the 'Permissions' option, a sub-menu is visible with 'Users', 'Roles', and 'Sales Reps Settings' options. The 'Roles' option is highlighted in blue. The background shows a table with one record and a search bar.

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



1. Create a role for sales reps and dealers

Role Information

Role Info

Role Resources

Add New Role

Back

Reset

Save Role

Roles Resources

Resource Access

Custom

Resources

- Sales
 - Orders
 - Invoices
 - Shipments
 - Credit Memos
 - Terms and Conditions
- Transactions
 - Fetch
 - Recurring Profiles
- Billing Agreements
- Tax
- Dashboard
- External Page Cache
- Importing Module
- Catalog
- Customers
 - Manage Customers
 - Customer Groups
 - Online Customers
- Promotions
 - Shopping Cart Price Rules
 - Catalog Price Rules

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.



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

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

2. Configure the role

Roles + Add New Role

Page 1 of 1 pages | View 20 per page | Total 2 records found Reset Filter Search

ID ↑	Role Name
1	Administrators
5	Sales Reps/Dealers

After you've created the new role, please see what id it has.

Then go to System -> Configuration -> Sales Reps and Dealers. There please fill in the id of the role in 'Role ID' field and save configuration. You can specify more than one role for sale reps and dealers.

Save Config

Current Configuration Scope: Default Config

Configuration

AMASTY EXTENSIONS

Sales Reps and Dealers

General

Role ID: 6 [GLOBAL]
▲ Restrictions for viewing customers and orders will be applied for this role only.

Show Dealer description at checkout: Yes [GLOBAL]

Show Dealer description in customer dashboard: Yes [GLOBAL]

Send New Order Email to the Sales Rep: Yes
▲ Indicate "Yes" to send a associated sales rep.

Show Re-assign Fields: Yes [GLOBAL]
▲ On the order view page in Backend.

Show From To: Yes [GLOBAL]
▲ From whom to whom re-assigned order.

Show Author of Message: Yes [GLOBAL]

Specify the settings for order assigning.

You can define whether sales reps/dealers should receive copies of the order emails that go to customers assigned to them.



3. Create users for the role

After that please go to System -> Permissions -> Users to create users for the role.

Users

+ Add New User

Page 1 of 1 pages | View 20 per page | Total 3 records found

Reset Filter Search

ID	User Name	First Name	Last Name	Email	Status
1	admin	admin	admin	admin@example.com	Active
2	dealer	Dealer	Role	dealer@example.com	Active



3. Create users for the role

User Information

- User Info
- User Role**
- REST Role

Edit User 'Sales Reps'

[Back](#) [Reset](#) [Delete User](#) [Save User](#)

Page 1 of 1 pages | View 20 per page | Total 3 records found

[Reset Filter](#) [Search](#)

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

Assign the user to the role and save the user.



4. Assign customers to the users

Then please go to edit the user and you will see new tabs. At the 'Manage Customers' tab you can assign customers to the user.

Dashboard Sales **Log** Mobile Customers Promotions Newsletter CMS Reports **System** [Get help for this page](#)

User Information

Manage Customers

- Reports
- Restrictions
- Additional
- User Info
- User Role
- REST Role

Edit User 'dealer'

[Back](#) [Reset](#) [Delete User](#) [Save User](#)

Page of 1 pages | View per page | Total 3 records found [Reset Filter](#) [Search](#)

<input type="checkbox"/>	ID	Name	Email
<input type="text" value="Any"/>	From: <input type="text"/>	<input type="text"/>	<input type="text"/>
To: <input type="text"/>			
<input checked="" type="checkbox"/>	1	John Doe	john.doe@example.com
<input checked="" type="checkbox"/>	2	Jerome Welch	Jerome@example.com
<input type="checkbox"/>	3	Hugh Sander	hugh@example.com

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.



5. Orders placed by customers assigned to the users

User Information

- Manage Customers
- Reports
- Restrictions
- Additional
- User Info
- User Role
- REST Role

At the 'Reports' tab you can see the list of orders placed by customers assigned to this user.

Edit User 'dealer'

Page 1 of 1 pages | View 20 per page | Total 7 records found

Order #	Purchase On	Bill to Name	Shipped to Name	Order Total	Bought From	Status	Action
	From: <input type="text"/> To: <input type="text"/>			From: <input type="text"/> To: <input type="text"/>			
100000001	Apr 21, 2011 8:32:30 AM	Nancy Hilarison	Nancy Hilarison	\$1,109.99	Main Website Main Store English	Pending	View Order
100000004	Apr 21, 2011 9:01:01 AM	Nancy Hilarison	Nancy Hilarison	\$321.94	Main Website Main Store English	Pending	View Order
100000005	Apr 21, 2011 9:01:42 AM	Nancy Hilarison	Nancy Hilarison	\$739.98	Main Website Main Store English	Closed	View Order
100000009	May 18, 2011 4:41:31 AM	Nancy Hilarison	Nancy Hilarison	\$801.95	Main Website Main Store English	Pending	View Order
100000010	May 18, 2011 4:46:04 AM	Nancy Hilarison	Nancy Hilarison	\$755.00	Main Website Main Store English	Pending	View Order
100000012	May 18, 2011 8:56:38 AM	Nancy Hilarison	Nancy Hilarison	\$755.00	Main Website Main Store English	Pending	View Order
100000014	May 18, 2011 10:53:48 AM	Nancy	Nancy Hilarison	\$755.00	Main Website Main Store English	Complete	View Order

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.



6. Assign the users to a particular customer group

The screenshot shows the 'Edit User' interface for a user named 'dealer'. The top navigation bar includes 'Dashboard', 'Sales', 'Catalog', 'Mobile', 'Customers', 'Promotions', 'Newsletter', 'CMS', 'Reports', and 'System'. The 'System' tab is active. On the left, the 'User Information' sidebar has tabs for 'Manage Customers', 'Reports', and 'Restrictions'. The 'Restrictions' tab is selected, showing a dropdown menu for 'Allowed Customer Group' with options: 'All', 'General', 'Wholesale', 'Retailer', and 'QAAAA'. The 'All' option is currently selected. At the top right of the 'Edit User' form, there are buttons for 'Back', 'Reset', 'Delete User', and 'Save User'. Two callout boxes provide additional information: one points to the 'Restrictions' tab in the sidebar, and another points to the dropdown menu.

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.



6. Assign the users to a particular customer group

Create New Order for Helena Example in English

Cancel Submit Order

Order Currency: US Dollar

Customer's Current Activities

Update Changes

Shopping Cart (0)

No items

Items Ordered

Add Products

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
---------	-------	-----	----------	----------	--------------	--------

No ordered items

Account Information

Customer Group *

Retailer

Email

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 specified by the store administrator ([see page 10](#)).



7. Specify additional info about the dealer

Dashboard Sales Catalog Mobile Customers Promotions Newsletter CMS Reports **System** [Get help for this page](#)


User Information

- Manage Customers
- Reports
- Restrictions
- Additional**
- User Info
- User Role
- REST

Edit User 'dealer' [Back](#) [Reset](#) [Delete User](#) [Save User](#)

Additional

Dealer Description [Show / Hide Editor](#)



Dealer

Peter Parker

Path: p » strong

Send copy of email to

Comma separated list of email addresses

At the 'Additional' tab you can specify additional info about the dealer/sales rep. The info 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.



7. Specify additional info about the dealer

Furniture Electronics Apparel

MY ACCOUNT

Account Dashboard

Account Information

Address Book

My Orders

Billing Agreements

Recurring Profiles

My Product Reviews

My Tags

My Wishlist

My Applications

Newsletter Subscriptions

My Downloadable Products

My Dashboard

Hello, Helena Example!

From your My Account Dashboard you have the ability to view a snapshot of your recent account activity and update your account information. Select a link below to view or edit information.

ACCOUNT INFORMATION

Contact Information

[Edit](#)

Helena Example
helena@example.com
[Change Password](#)

Newsletters

[Edit](#)

You are currently not subscribed to any newsletter.

Address Book

[Manage Addresses](#)

DEFAULT BILLING ADDRESS

You have not set a default billing address.
[Edit Address](#)

DEFAULT SHIPPING ADDRESS

You have not set a default shipping address.
[Edit Address](#)

YOUR DEALER INFO

Dealer

State: USA

City: Miami

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



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

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

8. Dealers can see only customers assigned to them

Let's log in a 'dealer'.

All customers created by the user from admin panel are automatically assigned to this user.

Dashboard Sales Catalog Mobile **Customers** Promotions Newsletter CMS Reports System [Get help for this page](#)

Manage Customers

[+ Add New Customer](#)

Page 1 of 1 per page | Total 5 records found [Export to: CSV](#) [Export](#) [Reset Filter](#) [Search](#)

It is possible to filter 'Not Assigned' dealers on customer and order grids.

Select All Unselect All		0 items selected		Actions		Submit				
ID	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Website	Action
Any	From:	Fr:				All Cou		From:		
	To:							To:		
<input type="checkbox"/>	5	Frank Wilson	General	271933	83001	United States	Arizona	Dec 29, 2014 6:11:18 AM	Main Website	Edit
<input type="checkbox"/>	4	Frank Wilson	General	573630	32044	United States	Florida	Dec 29, 2014 6:07:23 AM	Admin	Edit
<input type="checkbox"/>	3	Frank Wilson	General	681540	71110	United States	Louisiana	Dec 17, 2013 4:47:40 AM	Main Website	Edit
<input type="checkbox"/>	2	Frank Wilson	General	432156	23456	United States	Arkansas	Dec 17, 2013 4:27:36 AM	Main Website	Edit
<input type="checkbox"/>	1	Frank Wilson	General	1234567	12345	United States	Arizona	Aug 30, 2007 4:23:13 PM	Main Website	Edit

On 'Manage Customers' page I can see only customers assigned to this user.



9. Dealers can see only the orders of their customers

Orders

[+ Create New Order](#)

Page 1

'dealer' user can see only the orders placed by customers assigned to him.

Total 6 records found | [New](#)

Export to: CSV [Export](#)

[Reset Filter](#) [Search](#)

[Order RSS](#)

Select Visible | Unselect Visible | 0 items selected Actions [Submit](#)

	Dealer	Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status
Any				From: <input type="text"/> To: <input type="text"/>			From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	
<input type="checkbox"/>	Frank Wilson	100000006	Main Website Main Store English	Sep 14, 2016 9:58:44 AM	Joe Brick	Joe Brick	\$154.99	\$154.99	Pendin
<input type="checkbox"/>	Frank Wilson	100000005	Main Website Main Store English	Dec 17, 2013 5:29:43 AM	Jerome Geren	Jerome Geren	\$2,694.95	\$2,694.95	Comple
<input type="checkbox"/>	Frank Wilson	100000004	Main Website Main Store English	Dec 17, 2013 5:16:42 AM	John Doe	John Doe	\$7,429.94	\$7,429.94	Pendin



10. The admin can see all list of orders

Orders

[+ Create New Order](#)

Page of 1 pages | View per page

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

Export to: [Export](#)

[Reset Filter](#) [Search](#)

[Order RSS](#)

Select Visible | Unselect Visible | 0 items selected Actions [Submit](#)

	Dealer	Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status
<input type="text" value="Any"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Frank Wilson	100000006	Main Website Main Store English	Sep 14, 2016 9:58:44 AM	Joe Brick	Joe Brick	\$154.99	\$154.99	Pendin
<input type="checkbox"/>	Frank Wilson	100000005	Main Website Main Store English	Dec 17, 2013 5:29:43 AM	Jerome Geren	Jerome Geren	\$2,694.95	\$2,694.95	Comple
<input type="checkbox"/>	Frank Wilson	100000004	Main Website Main Store English	Dec 17, 2013 5:16:42 AM	John Doe	John Doe	\$7,429.94	\$7,429.94	Pendin



11. Dealers place admin orders only for their customers

Sales Catalog Customers System Get help for this page

Create New Order Back

Please Select a Customer Create New Customer


Page 1 of 1 pages | View 20 per page | Total 4 records found Reset Filter Search

ID	Name	Email	Telephone	ZIP/Post Code	Country	State/Province	Signed Up From
					All Countries		
5	Helena Example	helena@example.com					English
4	Example Customer	customer@example.com					Admin
2	Jerome Welch	Jerome@example.com	432156	23456	United States	Arkansas	Admin
1	John Doe	john.doe@example.com					English


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




12. Sorting and filtering of orders by dealers

 **Magento Admin Panel**

Dashboard **Sales** Catalog Mobile Customers Promotions Newsletter CMS Reports System

 **Order has been successfully assigned**

pages | View per page | Total 1 records found |  [New Order RSS](#)

Select Visible | Unselect Visible | 0 items selected

	Dealer	Order #	Purchased From (Store)	Purchased On	Bill to Name
Any				From: <input type="text"/> To: <input type="text"/>	
<input type="checkbox"/>	Bill Smith	100000001	Main Website Main Store English	Feb 8, 2012 4:47:53 AM	john doe

'Dealer' column is added to the order grid, so the main admin can see which orders are assigned to what dealers, filter and sort orders by dealers.



13. Reassign dealers for orders

Order has been successfully assigned
Comment has been successfully added

To assign the order to dealer or to admin, please, open Admin Panel/Sales/Orders/Information.

Order # 100000005 | Dec 17, 2013 5:29:43 AM

Back Send Email Credit Memo Reorder

Order # 100000005 (the order confirmation email is not sent)		Account Information	
Order Date	Dec 17, 2013 5:29:43 AM	Customer Name	Jerome Welch
Order Status	Complete	Email	Jerome@example.com
Purchased From	Main Website Main Store English	Customer Group	General
		<input type="text"/>	
		Assign To	Frank Wilson
		<input type="checkbox"/> 2014-07-16 10:38:10 Assigned From Admin To Frank Wilson Admin: Please, consider the order.	

One can write a comment when assigning the order.



14. Reassignment notifications

Sales Reps and Dealers

Save Config

At the extension configuration page (System -> Configuration -> Sales Reps and Dealers) you can 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.

General	
Re-assigned Order Notifications	
Send Emails	Yes [GLOBAL] <small>▲ Indicate "Yes" to send a notification about re-assigned order to the new and old sales reps.</small>
Sales Rep Can Assign Order to Other Reps	Yes <small>▲ Indicate "No" if you want sales rep to assign orders to the store administrator only.</small>
Admin Email	noreply@example.com <small>▲ If an order assigned from a sales rep to the store admin, email will be sent to this address</small>
Email Sender	Sales Representative [GLOBAL]
Email Template	Sales Rep Notification Template (Default Temp [GLOBAL]

To enable sales reps to assign their orders to other reps, please choose "Yes" for this setting.

When an order was re-assigned the assignee get the notification from this email.

You can choose a template for notification. If you need the template can be edited.



15. Assign customers to dealers

Manage Customers

[+ Add New Customer](#)

Page 1 of 1 pages | View 20 per page | Total 5 records found

Export to: CSV [Export](#)

[Reset Filter](#) [Search](#)

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected

											Actions	
ID	Dealer	Name	Email	Group	Telephone	ZIP	Country	State/Province	Created	Modified	Website	Action
Any	From:						All Cou					
To:												
<input type="checkbox"/>	5	Frank Wilson	Helena Example	helena@example.com	General	271933	83001	United States	Arizona	Dec 29, 2014 6:11:18 AM	Main Website	Edit
<input type="checkbox"/>	4	Frank Wilson	Example Customer	customer@example.com	General	573630	32044	United States	Florida	Dec 29, 2014 6:07:23 AM	Admin	Edit
<input type="checkbox"/>	3	Frank Wilson	Hugh Sander	hugh@example.com	General	681540	71110	United States	Louisiana	Dec 17, 2013 4:47:40 AM	Main Website	Edit
<input type="checkbox"/>	2	Frank Wilson	Jerome Welch	Jerome@example.com	General	432156	23456	United States	Arkansas	Dec 17, 2013 4:27:36 AM	Main Website	Edit
<input type="checkbox"/>	1	Frank Wilson	John Doe	john.doe@example.com	General	1234567	12345	United States	Arizona	Aug 30, 2007 4:23:13 PM	Main Website	Edit

Submit

- Delete
- Subscribe to Newsletter
- Unsubscribe from Newsletter
- Assign a Customer Group
- Assign to Dealer

Admin user can assign customers to different dealers via mass action.



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

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

15. Assign customers to dealers

Customer Information

Customer View

Account Information

Addresses

Orders

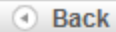
Billing Agreements

Recurring Profiles (beta)

Shopping Cart

Wishlist

 **Hugh Sander**

 Back

 Reset

 Log In as Customer

 Create Order

 Delete

Account Information

Associate to Website *

Main Website

Created From

Admin

Customer Group *

General

Disable Automatic Group Change Based on VAT ID

Dealer

Frank Wilson

Prefix

First Name *

Hugh

Middle Name/Initial

Last Name *

Sander

You can also select a dealer for the customer at the 'Account information' tab of the 'Customer information' page.



15. Assign customers to dealers

Customer Information

Customer View

Account Information

Addresses

Orders

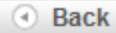
Billing Agreements

Recurring Profiles (beta)

Shopping Cart

Wishlist

 **Hugh Sander**

 Back

 Reset

 Log In as Customer

 Create Order

 Delete

Account Information

Associate to Website *

Main Website

Created From

Admin

Customer Group *

General

Disable Automatic Group Change Based on VAT ID

Dealer

Frank Wilson

Prefix

First Name *

Hugh

Middle Name/Initial

Last Name *

Sander

You can also select a dealer for the customer at the 'Account information' tab of the 'Customer information' page.



16. Add variable to e-mail template

Edit Email Template

[← Back](#)[Reset](#)[✖ Delete Template](#)[Convert to Plain Text](#)[Preview Template](#)[✔ Save Template](#)

Template Information

Template Name *

Sales Rep Order Notification Template

Template Subject *

{{var store.getFrontendName()}}: New Order # {{var order.increment_id}}

[Insert Variable...](#)

Template Content *

```
<!-- [ middle starts here] -->
<tr>
  <td valign="top">
    <h1 style="font-size:22px; font-weight:normal; line-height:22px; margin:0 0 11px 0;">Hello, {{htmlscape
var=$order.getCustomerName()}}</h1>
    <p style="font-size:12px; line-height:16px; margin:0;">
      Thank you for your order from {{var store.getFrontendName()}}.
      Once your package ships we will send an email with a link to track your order.
      You can check the status of your order by <a href="{{store url="customer/account/"}}
style="color:#1E7EC8;">logging into your account</a>.
      Your dealer is: {{var dealer.firstname}} {{var dealer.lastname}}.
      If you have any questions about your order please contact us at <a href="mailto:{{config
path='trans_email/ident_support/email'}}" style="color:#1E7EC8;">{{config path='trans_email/ident_support
/email'}}</a> or call us at <span class="nobr">{{config path='general/store_information/phone'}}</span> Monday -
Friday, 8am - 5pm PST.
    </p>
    <p style="font-size:12px; line-height:16px; margin:0;">Your order confirmation is below. Thank you again
for your business.</p>
  </td>
</tr>
```

Add `{{var dealer.firstname}}` and `{{var dealer.lastname}}` variables to an order e-mail templates and be sure that your customers always know the name of the dealer who is working with them.



16. Add variable to e-mail template

THANK YOU FOR YOUR ORDER FROM MADISON ISLAND.

Once your package ships we will send an email with a link to track your order. Your order summary is below. Thank you again for your business.

Order Questions?

Email: support@example.com

Your dealer: **Frank Wilson**

Your order #145000006

Placed on July 21, 2016 7:55:06 AM PDT



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

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

Thank you!

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

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

Your feedback is absolutely welcome!



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

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