Multiple Salespeople in Agvance
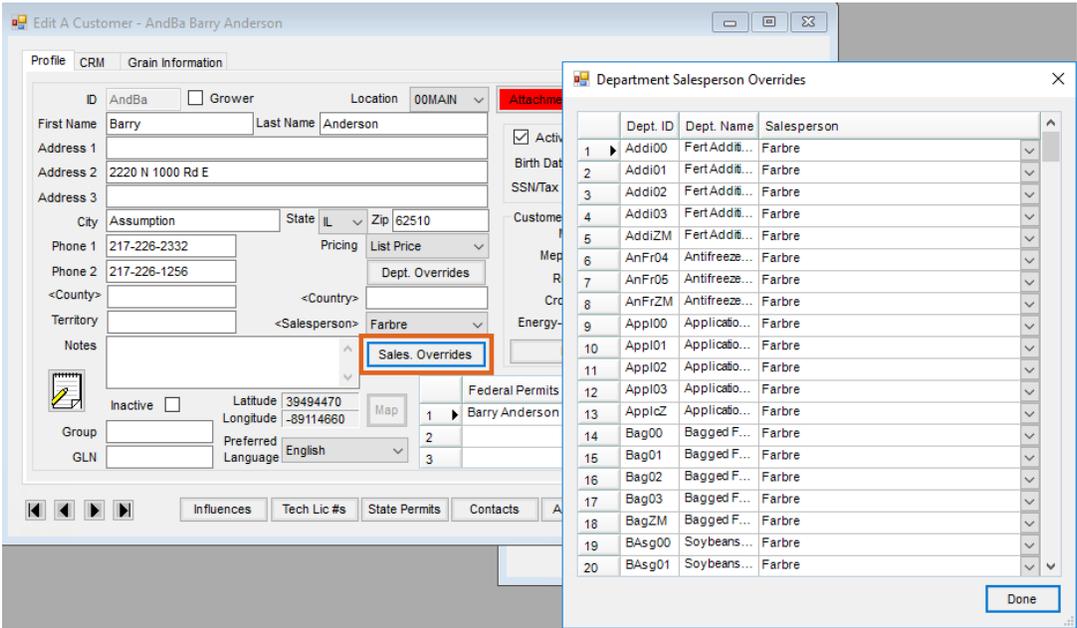
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Setup

By Customer By Department

Multiple Salespeople can be added to a Customer profile in Agvance.

Selecting **Sales. Overrides** on the Customer *Profile* tab opens the *Department Salesperson Overrides* window.

Here, all departments are listed with the Salesperson selected in the *Salesperson* field on the Customer profile defaulted for every department. An alternate Salesperson can be selected for each department from the drop-down.

Customer Ship To Address

Multiple salespeople can be set up per Ship To Address by going to the Customer profile and selecting**Addresses** then choosing **Sales. Override**.

Transaction Defaults

Delivery Tickets

Delivery Tickets will honor the multi-Salesperson setup when importing transactions, selecting the Ship To, or adding the first Product.

When adding a Delivery Ticket, the Salesperson based on selection on the *Profile* tab of the Customer profile will default based on the department housing the first Product listed on the transaction. Reordering lines will not affect the Salesperson.

> **Example:** If the first Product selected for the Delivery Ticket is from the Bagged Fert department and other line items are from the Small Seed department, the Salesperson set up for that customer for the Bagged Feed department will be chosen.

If a Ship To is selected, Agvance will look to the Salesperson set up for that address. If the Ship To gets changed to a Ship To with a different Salesperson, the Salesperson will also change.

The import of a Booking and Agrian rec defaulting the Salesperson from the source transaction are still honored rather than resetting to the default Salesperson for the first Product.

Blend Tickets and Plans

Blends and Plans support the ability to use the multi-Salesperson setup when adding Products, selecting a Ship To, or importing transactions.

When adding a Blend Ticket, the Salesperson based on selection on the *Profile* tab of the Customer profile will default based on the Department housing the first product listed on the transaction. Reordering lines will not affect the Salesperson.

> **Example:** If the first Product selected for the Blend Ticket is from the Dry Fertilizer department and other line items are from the Application department, the Salesperson set up for that Customer for the Dry Fertilizer department will be chosen.

If a Ship To is selected, Agvance will look to the Salesperson set up for that address. If the Ship To gets changed to a Ship To with a different Salesperson, the Salesperson will also change.

Sales Order

Sales Orders support the ability to use the multi-Salesperson setup when selecting a Ship To or adding the first Product to the transaction.

The hierarchy rules of the Salesperson assigned are as follows:

1. Ship To Department Override
2. Ship To
3. Customer Department Override
4. Customer Profile

Quick Ticket

Quick Tickets honor the multi-Salesperson setup when selecting the first Product for the transaction.

The hierarchy rules of the Salesperson assigned are as follows:

1. Customer Department Override
2. Customer Profile

Bookings

Bookings honor the multi-Salesperson setup when importing transactions or adding the first product to the transactions.

The hierarchy rules of the Salesperson assigned are as follows:

1. Customer Department Override
2. Customer Profile

When importing a Plan or Sales Order into a Booking, the Salesperson on the Plan is used. If there is no Salesperson on the Plan, the hierarchy rules are followed.

Invoices

Invoices honor the multi-Salesperson setup when adding the first Product to the Invoice or if changing the Ship To.

When adding an Invoice with no imports, the Salesperson is selected based on the following hierarchy:

1. Ship To Department Override
2. Ship To
3. Customer Department Override
4. Customer Profile

Importing Tickets

If the Salesperson is manually changed, Agvance will use what was manually selected. Changing the Ship To information causes Agvance to change the Salesperson on the transaction to use the hierarchy above.

If multiple tickets are imported and there are different salespeople on the tickets, a warning will display to indicate tickets with differing salespeople are being imported with the option to continue or cancel. The Salesperson should be reviewed for accuracy if continuing with the transaction.

Passport Import

The Gilbarco Passport Invoices import at *Accounting / Transfers / Import* honors the multi-department default Salesperson setup when importing these Invoices into Agvance. It will use the Grower if one exists and the department-level Salespeople for the Invoice by the first Product. This does not use Ship To information as that does not exist on the Invoices created. The *Default Salesperson uses hierarchy* option must be checked to use the multiple Salesperson rules.
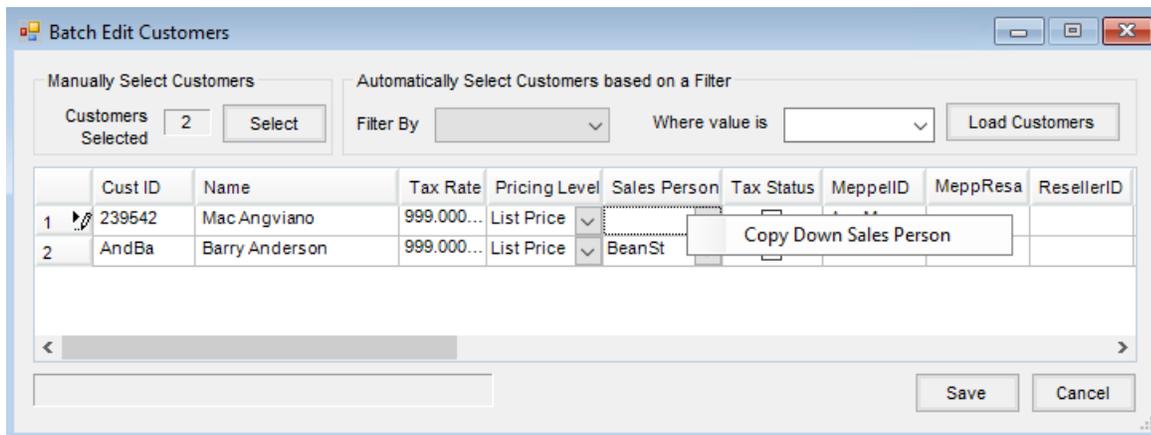
Admin Utilities Options

Admin Utilities can be found at *Hub / Utilities / Admin Utilities*.
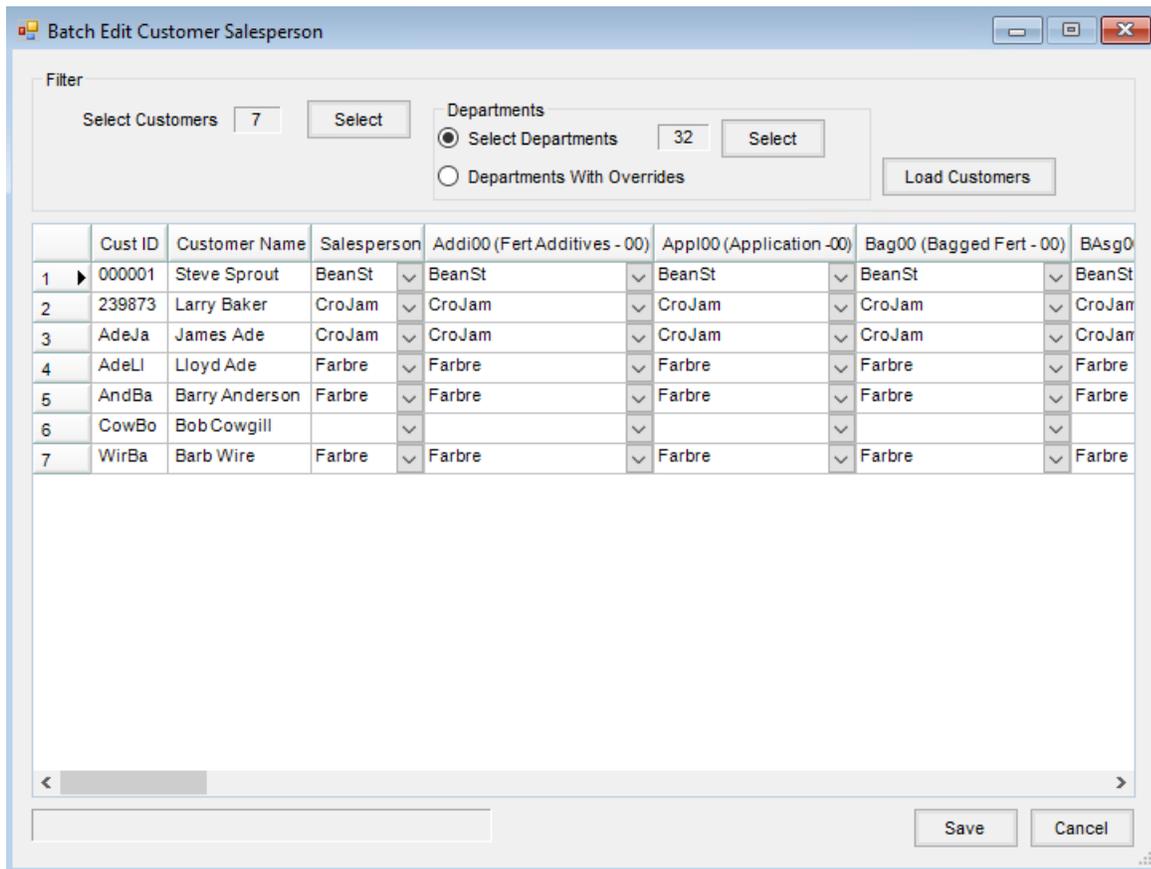
Add/Edit Salespeople on Customer

In Admin Utilities at *Hub / Batch Edit Customers,* a copy down option (right-clicking in the desired field) is available in the *Salesperson* column along with the ability to remove a Salesperson by choosing the blank option in the drop-down.

Batch Edit Customer Salesperson

In Admin Utilities, navigate to *Hub / Batch Edit Customer Salesperson* to assign multiple salespeople per department for selected customers.

Choose the appropriate customers and departments then choose **Load Customers** to populate the grid. A Salesperson can then be selected per customer per department. A copy down option (right-clicking in the desired field) is available as well along with the ability to remove a Salesperson by choosing the blank option in the drop-down.

Choose **Save** when done.