

**A**masty

For more details see the [Sales Reps and Dealers](#) extension page.

## 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

### Extension Configuration

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

## General

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

**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.

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

## Re-assigned Order Notifications

**Send Emails**  
[global]

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

**Dealer Can Assign Order to Other Dealers**  
[global]

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

**Admin Name**  
[global]

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

**Admin Email**  
[global]

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

**Email Sender**  
[store view]

**Email Template**  
[store view]

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.

## Frontend

<b>Allow Customers to select a Dealer on Registration</b> <small>[store view]</small>	Yes	▼
<b>Allow Customers to select a Dealer in Customer Account</b> <small>[store view]</small>	Yes	▼
<b>Show Dealer description at checkout</b> <small>[store view]</small>	Yes	▼
<b>Show Dealer description in customer dashboard</b> <small>[store view]</small>	Yes	▼

**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.

The screenshot shows the 'Add New Role' configuration page. On the left is a sidebar with a 'ROLE INFORMATION' tab selected, containing links for 'Role Info', 'Role Resources', 'Role Users', and 'Amasty: Sales Reps and Dealers'. The main content area is titled 'Role Information' and features a 'Role Name' input field with the value 'Dealer'. Below this is a section for 'Current User Identity Verification' with a 'Your Password' input field.

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

**ROLE INFORMATION**

Role Info

**Role Resources**

Role Users

Amasty: Sales Reps and Dealers

### Roles Resources

Resource Access: Custom

Resources

- Dashboard
- Sales
  - Operations
    - Orders
      - Actions
        - Create
        - View
        - Send Order Email
        - Reorder
        - Edit
        - Cancel
        - Accept or Deny Payment
        - Capture
        - Invoice
        - Credit Memos
        - Hold
        - Unhold
        - Ship
        - Comment
        - Send Sales Emails
- Invoices
- Shipments
- Credit Memos
- Billing Agreements
  - Actions
    - View
    - Manage
    - Place Order Using Billing Agreements

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.

**ROLE INFORMATION**

Role Info

Role Resources

**Role Users**

Amasty: Sales Reps and Dealers

### Role Users

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<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
<input checked="" type="checkbox"/>	4	sales rep	Lisa	Jones	jones@example.com	Active
<input checked="" type="checkbox"/>	5	sales representative	Loren	Holmes	holmes@example.com	Active

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

The image shows a sidebar on the left with a 'ROLE INFORMATION' header and three menu items: 'Role Info', 'Role Resources', and 'Role Users'. The 'Role Users' item is highlighted with a red vertical bar. Below the sidebar, the main content area is titled 'Amasty: Sales Reps and Dealers'. It features an 'Is Dealer' label followed by a dropdown menu with 'Yes' selected. Below this, a note states: 'Restrictions for viewing customers and orders will be applied for this role only.'

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.

The image shows a sidebar on the left with a 'USER INFORMATION' header and seven menu items: 'User Info', 'User Role', 'Additional', 'Manage Customers', 'Restrictions', and 'Reports'. The 'User Info' item is highlighted with a red vertical bar. The main content area is titled 'Account Information' and contains a form with the following fields: 'User Name' (value: dealer), 'First Name' (value: Frank), 'Last Name' (value: Wilson), 'Email' (value: wilson@example.com), 'New Password', 'Password Confirmation', 'Interface Locale' (value: English (United States) / English (United States)), and 'This account is' (value: Active).

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

- User Name
- First Name

- Last Name
- Email

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

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

Additional Information

Dealer Description Show / Hide Editor

**Dealer**  
Name: Frank Wilson  
City: Miami  
e-mail: wilson@example.com  
*Frank is glad to offer a helping hand and improve your shopping experience.*

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.



**Customers**

Search [Reset Filter](#) 4 records found 20 per page 1 of 1

<input type="checkbox"/>	First Name	Last Name	Email	Status
<input type="checkbox"/>	Veronica	Costello	roni_cost@example.com	Active
<input checked="" type="checkbox"/>	Ray	Liam	ray.liam@example.com	Active
<input checked="" type="checkbox"/>	Destin	Blake	blake@example.com	Active
<input type="checkbox"/>	advanced	ideas	remus.munteanu@advancedideas.ro	Active

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.

**Restrictions**

Allowed Customer Group

- General
- Wholesale
- Retailer

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

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.

Order #	Purchase On	Bill to Name	Shipped to Name	Base Grand Total	Base Discount Amount	Base Discount Canceled	Base Discount Invoiced	Base Discount Refunded	Base Shipping Amount	Base Shipping Canceled
000000003	2016-08-10 15:01:29	Veronica Costello	Veronica Costello	\$58.04	\$0.00				\$5.00	

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

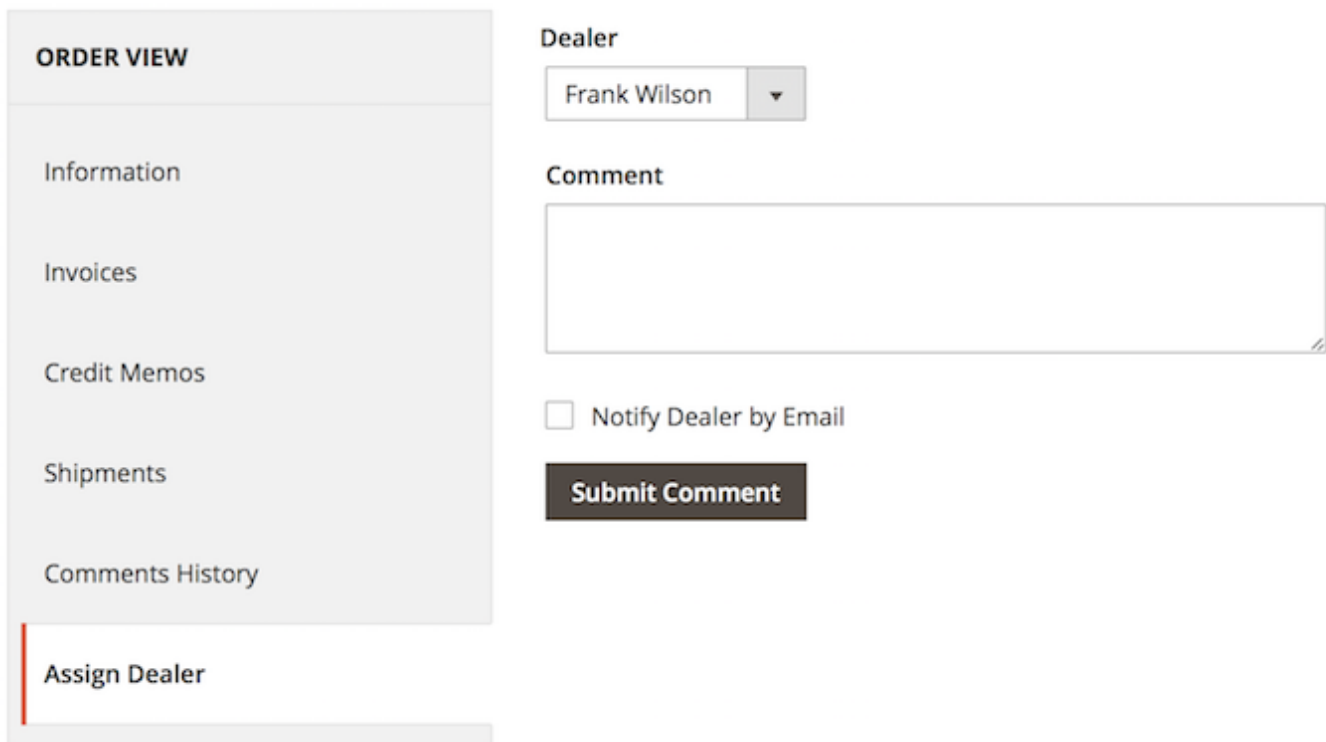
It is possible to filter and sort orders on this grid. So, for example, if you pay commissions to sales reps/dealers based on complete orders, you can filter the list to show only completed orders.

## Sorting and Filtering Orders by Dealer

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Dealers	Action
000000003	Main Website Main Website Store Default Store View	Aug 10, 2016, 15:08:00 PM	Veronica Costello	Veronica Costello	\$58.04	\$58.04	Pending	Frank Wilson	<a href="#">View</a>
000000002	Main Website Main Website Store Default Store View	Jun 24, 2016, 7:06:00 AM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete		<a href="#">View</a>
000000001	Main Website Main Website Store Default Store View	Jun 24, 2016, 7:06:00 AM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing		<a href="#">View</a>

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



The screenshot displays the 'Assign Dealer' interface in Magento 2. On the left, a sidebar menu under the heading 'ORDER VIEW' contains several options: 'Information', 'Invoices', 'Credit Memos', 'Shipments', 'Comments History', and 'Assign Dealer'. The 'Assign Dealer' option is highlighted with a red vertical bar. The main content area on the right features a 'Dealer' dropdown menu with 'Frank Wilson' selected. Below this is a 'Comment' text area, a checkbox labeled 'Notify Dealer by Email', and a 'Submit Comment' button.

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

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Dealer

Frank Wilson



[Create an Account](#)

Customers can select a dealer during the registration process.

Also, customer can choose a dealer to work with.

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Find out how to install the Sales Reps and Dealers extension via [Composer](#).

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