

2004-104 - Setting up the Sales ID

Overview:

In the Client Details window the **Sales ID** field, is the name of the employee designated to oversee sales for that client, whereas the **Employee Name** field is the person who created the client record. Once set-up, the employee number will be displayed in the **Sales ID** field on all Sales and Factory Orders for that client.

To Set-Up the Sales ID

From the OPTO ribbon, select the 'Contacts' tab and **click** on the 'New/Edit Clients' icon to open the 'Clients Details' window. **Click** in the **Sales ID** field and **press <F2>** select the employee from the pop-up list. **Click** on **OK** and **press <TAB>** to display the name. To include the **Sales ID** in the Sales and Factory Orders by default, **click** on

'Parameters - ORDER BOOK' from the list extension, and then **click** on 'Parameters - ORDER' to display the window. **Click** on the "Auto Order" tab and **click** on the tick boxes as shown below. **Press <F9>** to save your settings.

A new Sales or Factory Order is created, and the **Emp No** field (1) is automatically populated with the employee number associated with the USER number of the person creating the order. The **Sales ID** field (2) is automatically filled with the employee who was set-up in the 'Client' window.

The screenshot shows a software window titled "Sales Order - <New Entry>". At the top, there are fields for "Order No:" (50156), "Client Code:" (ANTON), and "Client Name:" (TEST CLIENT FOR RENAME EMP CODE). Below this is a "Details" tab with various input fields. A red box labeled "1" highlights the "Emp No:" dropdown menu, which is set to "32". Another red box labeled "2" highlights the "Sales ID:" dropdown menu, also set to "32". Other fields include "Date Entered:" (27/07/2018), "ABN:" (99 999 111 999), "Div:" (2), "Cat(A):", "Job Type:" (TEST CLIENT FOR RENAME EMP CODE), "Job Info:" (Repairs), and "Job Desc:". There are also radio buttons for "Order", "Credit Note", "Normal", "Urgent", "Confirmed", and "Forecast", and checkboxes for "Shipping Address", "Pickup", and "OnHold".