## 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 <u>OK</u> 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.

File HOME CONTACTS RESOURCES INVENTORY QUOTES PURCHASING ORDERS JOBS/SCHE	DULING			
Image: Construction	Edit F			
General Print QA More Info Auto Order Back Ord				
Period 1 (Shortest) (Default: 7 days): 7				
Period 2 (Default: 14 days): 14				
Period 3 (Default: 30 days): 30				
Period 4 (Default: 60 days): 60				
Period 5 (Longest) (Default: 90 days): 90				
Default Parts Auto Order setting				
OPast Due ONow O7 Days 14 Days 30 Days 60 Days 90 Days Overall				
Global Order Book Alert				
[2] Add SalesiD from Client (Sales Order)     [2] Add SalesiD from Client (Sales Order)				
[2] SalesID required in Client (Sales Order) [2] Cat(A) required in Sales Order				
[2] Add SalesID required in Client (Sales Order)				
<ul> <li>[3] Use Qty 0 entering new Parts (Factory Order), No Strikeou</li> </ul>				
[2] First Quote Required for Factory Order				
[2] Client Order No Kequired in Factory Order				
[2] Hansport required in Sales Order     [3] Use Pref / Avr Cost / Last Purchase Price for Sales Order (Cost Calculation MARGIN)				
Add Alert for "Freight" if Total Order Amount entered is less then ->> (only for Sales Order)				
[2] Export SQL				
[2] Use Client Name in Client Callup Sheet				
[2] No Negative Alloc SALES ORDER				
[2] Add QMS if Client Order canceled				
[2] Use Client Mat/Part Grp Discount (Sales Order) [3] Iak Tune entries of a Sales Order [3] Iak Tune entri				
[2] Job Type required in Pactory Order				
[2] Use Lot ID [2] Use Job Description from Quote				
[2] Use PRG/DXF     [2] Use Project from Quote				

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.

Sales Orde	r - <new entry=""></new>	[	- • ×
Order No: <u>Client Code:</u> Client Name:		Client Name: Del Contact , Phone No / Invoic	e Email 🖉
50156	ANTON -	TEST CLIENT FOR RENAME EMP CODE	*
Details Mo Date Entered 27/07/2018	ore Info         Attachments           I:         ABN:           III:         99 999 111 999           32	No: <ul> <li>Order</li> <li>Credit Note</li> <li>Normal</li> <li>Urgent</li> <li>Confirme</li> <li>Larry Moreton</li> <li>Shipping Address</li> <li>Pickup</li> </ul> <li>Interval of the second s</li>	d O Forecast
Client Order Job Info: F Job Desc:	No: Div: 2 Repairs	Sales ID: Cat(A): Job Type: 32	