

User Guide

1. Overview

As its name suggests, [Magento 2 Sales Rep extension \(https://bsscommerce.com/magento-2-sales-rep-extension.html\)](https://bsscommerce.com/magento-2-sales-rep-extension.html), allows creating a team of sales representatives to keep in touch with specific customers in terms of orders and quotes.

Keep scrolling down to figure out how our solution works, especially for the B2B business.

2. How Does It Work?

General

Enable [global] Yes Version 1.0.0

Sales Rep Email Config

Email Sender [store view] Sales Representative

Send Email Copy to [store view] johndoe.salesrep@abc.com
Separate multiple emails with a comma

Assign Sales Rep to Customer [store view] Assign Sales Rep to Customer (Default)
Email template chosen based on theme fallback when "Default" option is selected.

Unassign Sales Rep to Customer [store view] Unassign Sales Rep to Customer (Default)
Email template chosen based on theme fallback when "Default" option is selected.

Enable Sales Rep and Set up email notifications

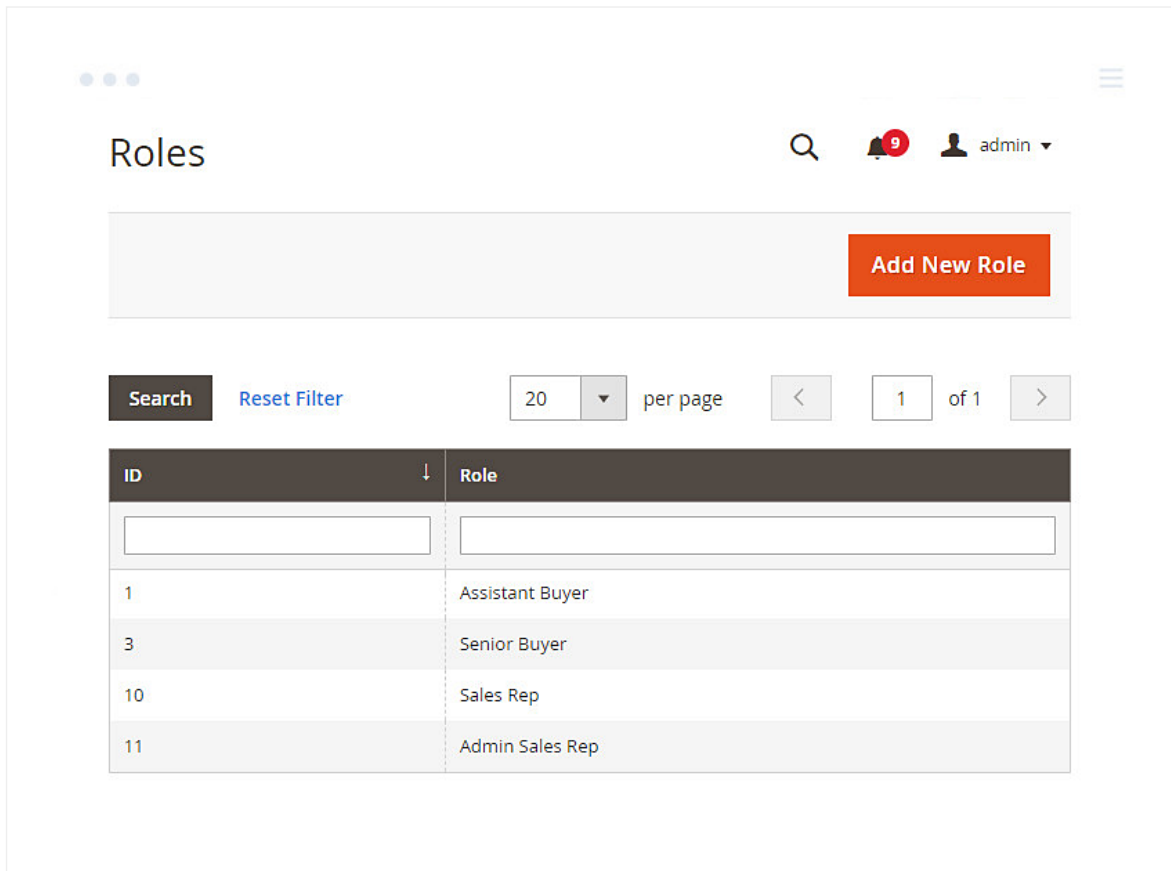
Please go to **Stores => Configurations => Sales Rep.**

First off, set **Enable** to **Yes** so that the store admin can start creating new sales representatives per customer.

In the **Sales Rep Email Config**:

- **Email Sender:** Pick up a sender you have created in advance.
- **Send Email Copy to:** Enter multiple emails separated by a comma. We suggest sending email copies of "Assign Sales Rep to Customer" and "Unassign Sales Rep to Customer" emails to your sales rep so that they can get updated in real-time.
- **Assign Sales Rep to Customer:** Choose an available template, for example, our built-in "Assign Sales Rep to Customer (Default)" template.
- **Unassign Sales Rep to Customer:** Choose an available template, for example, our built-in "Unassign Sales Rep to Customer (Default)" template.

2.1. Create roles of Sales Rep



Create the roles of sales rep

When this extension is installed completely, there are NO created roles of the admin sales rep and sales rep. Hence, the admin needs to create the new role first before assigning a user as a sales rep.

Follow the below guide:

Navigate to **Systems => Permissions => User Roles.**

Simply put, choose **Add New Role.**

Add the new role of Sales rep

Under **Role Information:**

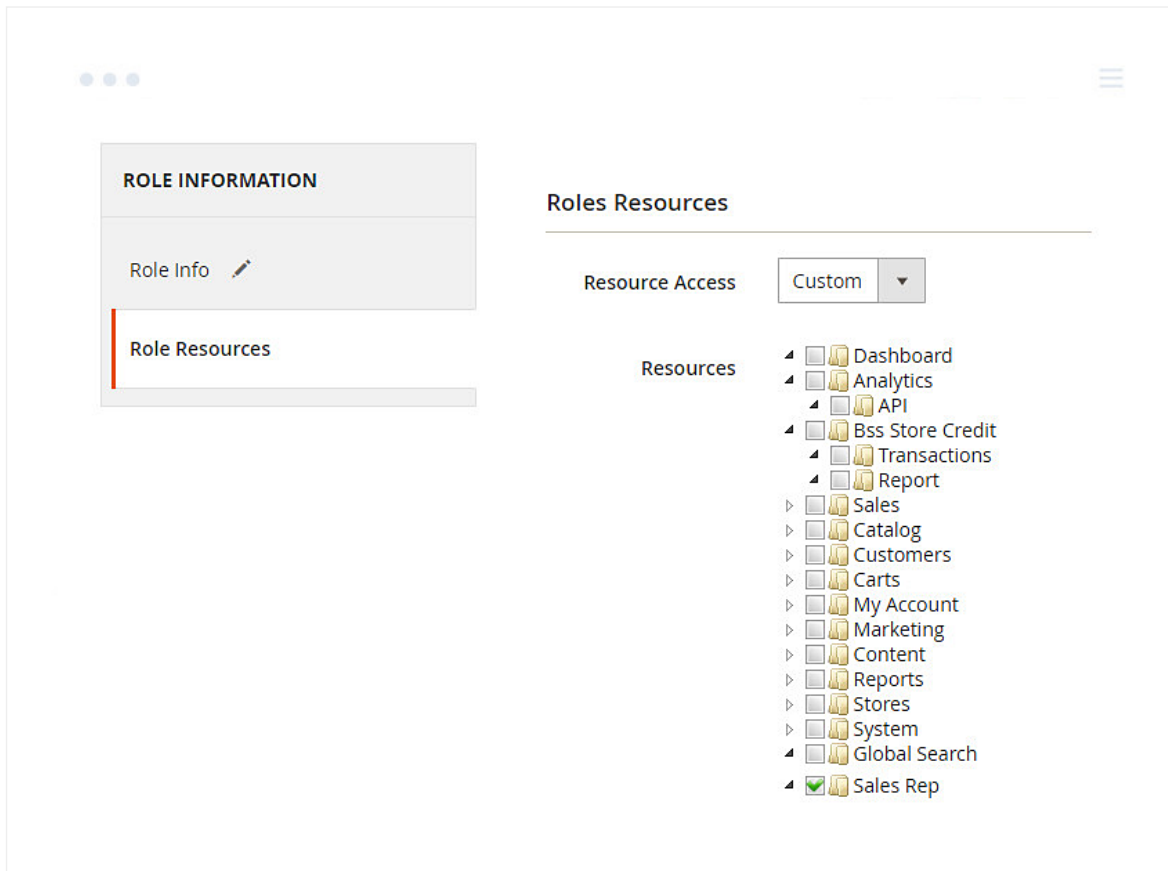
- **Role Name:** Enter a role for easy management
- **Sales Rep Role:** Choose either **Admin Sales Rep** or **Sales Rep**

+ **Sales Rep:** Users with this role can access a tab in the admin panel to manage customers, orders, and quotes assigned to them.

+ **Admin Sales Rep:** Users with this role can manage customers, orders, and quotes assigned to all sales representatives.

- **Your Password:** Enter the login password to confirm the action

Under **Role Resources:**



Assign resources to the role

Tick on **Sales Rep** resource, then users with the role can access the **Customers, Orders, and Quotes** grids assigned to them.

Notes:

+ The Quotes resource is only shown if you install the [Magento 2 Request for Quote extension \(https://bsscommerce.com/magento-2-request-for-quote-extension.html\)](https://bsscommerce.com/magento-2-request-for-quote-extension.html).

+ We have developed the **Sales Rep** resources with all information required by a sales rep to manage their customers.

	Permissions	Non-permissions
Sales Rep Role	<ul style="list-style-type: none"> - Viewing information of assigned customers in Customers, Orders, and Quotes grids - Updating information of the assigned customers - Managing Orders and Quotes created by the customer - Creating a new order for the customer 	<ul style="list-style-type: none"> - Creating a new customer - Creating and updating a new email template - Assigning the customer to a new sales rep
Admin Sales Rep Role	<ul style="list-style-type: none"> - Viewing information of customers assigned to all sales reps in Customers, Orders, and Quotes grids 	<ul style="list-style-type: none"> - Creating a new customer, order, or sales rep - Managing the customers, orders, and quotes

Sales Rep permissions

+ You can also assign Sales Rep users to other resources.

+ When a customer is assigned to another sales rep, orders and quotes assigned the former sales rep will remain under the control of that sales rep rather than of the new one.

Save the new role and click back on the created role, the **Role Users** session will appear.

Under **Role Users**, choose available users or create a new one later.

Role Users

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

<input type="checkbox"/>	ID	User Name ↓	First Name	Last Name	Email	Status
<input type="checkbox"/>						
<input checked="" type="checkbox"/>	1	admin	admin	admin	dev@gmail.com	Active
<input type="checkbox"/>	2	Staphanie	Staphanie	Greene	staphanie.salesrep@abc.com	Active
<input type="checkbox"/>	3	John	John	Doe	john.doe.salesrep@abc.com	Active
<input type="checkbox"/>	4	Tai	Tai	Chen	tai.chen.salesrep@abc.com	Active
<input type="checkbox"/>	5	Scarlette	Scarlette	Nguyen	scarlette.ng.salesrep@abc.com	Active
<input type="checkbox"/>	6	Rosie	Rosie	Hana	rosie.admin.salesrep@abc.com	Active

Assign users to a role

2.2. Create users of Sales Rep roles

Users

Search [Reset Filter](#) 20 per page 1 of 1 Add New User

ID	User Name ↓	First Name	Last Name	Email	Role	Status
<input type="checkbox"/>						
1	admin	admin	admin	dev@gmail.com	Administrators	Active
2	Staphanie	Staphanie	Greene	staphanie.salesrep@abc.com	Sales Rep	Active
3	John	John	Doe	john.doe.salesrep@abc.com	Sales Rep	Active
4	Tai	Tai	Chen	tai.chen.salesrep@abc.com	Sales Rep	Active
5	Scarlette	Scarlette	Nguyen	scarlette.ng.salesrep@abc.com	Sales	Active
6	Rosie	Rosie	Hana	rosie.admin.salesrep@abc.com	Admin Sales Rep	Active

Manage all users in the grid

Navigate to **Systems => Permissions => All Uses**. Choose **Add New User**.

The screenshot shows the user profile page for Stephanie Greene. At the top, there is a search icon, a notification bell with '9', and a user profile icon labeled 'admin'. Below this is a navigation bar with buttons: Back, Delete User, Reset, Force Sign-In, and a prominent Save User button. The main content area is titled 'Account Information' and contains several form fields: User Name (Stephanie), New Password (masked), First Name (Stephanie), Password Confirmation (masked), Last Name (Greene), Interface Locale (English (United States)), and Email (stephanie.salesrep@abc.com). There is also a dropdown for 'This account is' set to 'Active'. At the bottom, there is a 'Current User Identity Verification' section with a 'Your Password' field (masked).

Create a new sales rep user

Under **User Info**, fill in the user's information and enter your password to confirm the action.

The screenshot shows the role assignment section of the user profile page for Stephanie Greene. On the left, there is a sidebar with 'USER INFORMATION' and three options: 'User Info', 'User Role' (which is selected and has a pencil icon), and 'Additional Information'. The main content area has a 'Search' button, a '20 per page' selector, and a pagination indicator '1 of 1'. Below this is a table with two columns: 'Assigned' and 'Role'. The 'Assigned' column has a dropdown menu currently set to 'Any'. The 'Role' column lists four options: Assistant Buyer, Senior Buyer, Sales Rep (which is selected with a radio button), and Admin Sales Rep.

Assigned	Role
Any	<input type="text"/>
<input type="radio"/>	Assistant Buyer
<input type="radio"/>	Senior Buyer
<input checked="" type="radio"/>	Sales Rep
<input type="radio"/>	Admin Sales Rep

Assign a role to the user

Under **User Role**, pick up an available role, in this case, either **Sales Rep** or **Admin Sales Rep**.

The screenshot shows a user profile for Stephanie Greene. At the top, there are navigation options: Back, Delete User, Reset, Force Sign-In, and a prominent Save User button. The profile is divided into two main sections: USER INFORMATION and Additional Information. The USER INFORMATION section includes fields for User Info and User Role. The Additional Information section features a 'Show / Hide Editor' button and a WYSIWYG text editor. The editor contains the following text: **Name:** Stephanie Greene, **Email:** stephanie.salesrep@abc.com, **Phone:** +12345xxxx, and a paragraph: "Stephanie has 5 years of experience in supporting and resolving issues of customers when it comes to orders, quotes, and transactions. She is now of your service." The editor is powered by TINY.

Add information to the sales rep user

Under **Additional Information**, you can add information to the sales rep user in WYSIWYG editor. This information will be visible under My Account of the customer.

2.3. Assign customers to sales rep users

<input type="checkbox"/>	ID	Name	Email	Group	Sales Rep	Action
<input type="checkbox"/>	2	Patrick Lee	patrick@gmail.com	General		Edit
<input type="checkbox"/>	36	Pham Huong	huongttptt@bsscommerce.com	General		Edit
<input type="checkbox"/>	13	Xiao Lin	xiao.lin@gmail.com	General	Tai	Edit
<input type="checkbox"/>	11	Halu Song	hailuuphl@gmail.com	General	Scarlette	Edit
<input type="checkbox"/>	19	Oswaldo Hirthe	hskiles@horsestore.com	Wholesale	Tai	Edit
<input type="checkbox"/>	3	Brixton Fan	fanie.brixton.321@gmail.com	Wholesale	Stephanie	Edit
<input type="checkbox"/>	1	Veronica Costello	ronj_cost@example.com	Wholesale	Stephanie	Edit
<input type="checkbox"/>	45	Florian Marty	florian@jokercorp.com	Wholesale	Stephanie	Edit

Customers under the store admin's view

At first, all customers are recorded in the **Customer** grid and available under the admin store's view.

In this grid, the store admin can assign a customer to a specific Sales Rep user by going to the customer edit page.

← Back Delete Customer ... Force Sign-In Save and Continue Edit **Save Customer**

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- ...
- Sales Representative**
- Store Credit

Sales Representative

Sales Representative: Stephanie

Information

Name: Stephanie Greene
Email: stephanie.salesrep@abc.com
Phone: +12345xxx

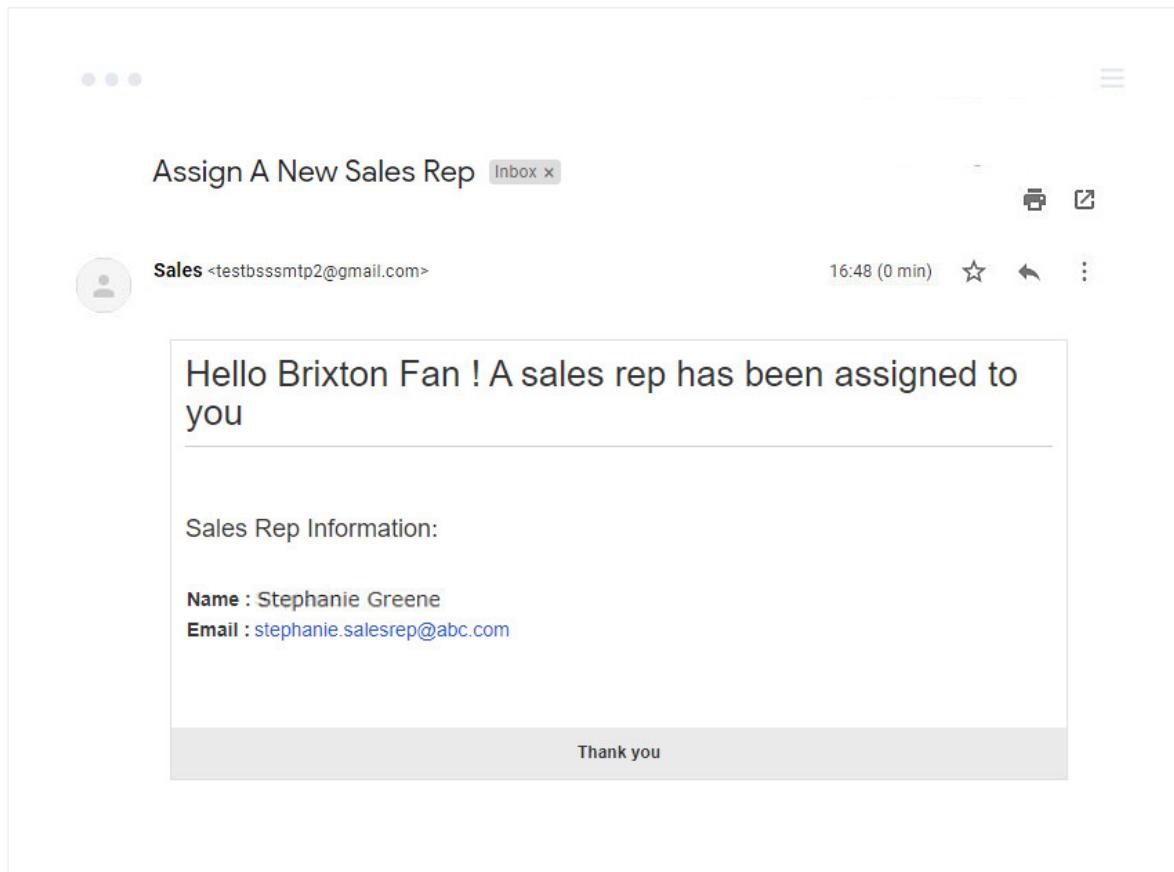
Stephanie has 5 years of experien in supporting and resolving issues of customers when it comes to orders, quotes, and transactions. She is now of your service.

[Edit](#)

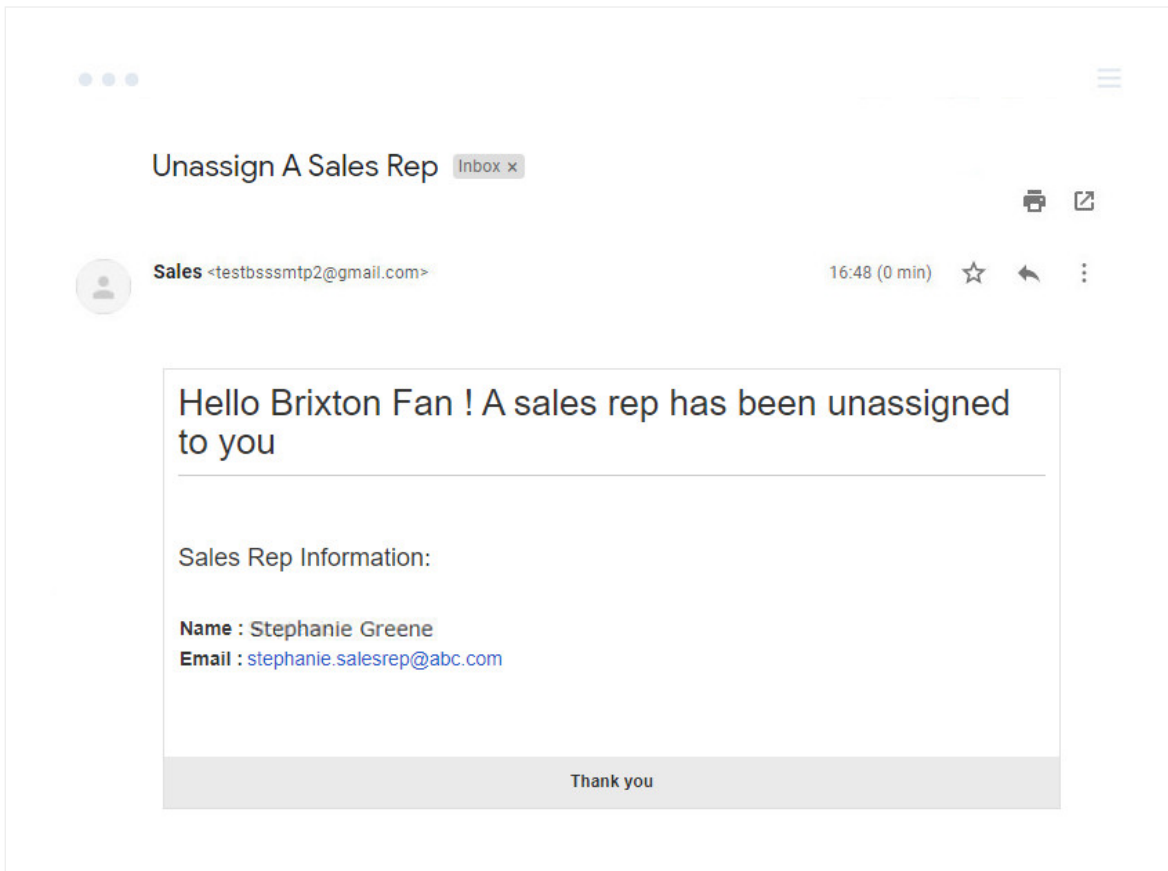
Scroll down to the **Sales Rep** tab to assign the Sales Rep user to the customer. The information of that user is shown accordingly.

2.4. Notify the customers

When a Sales Rep user is assigned or unassigned to a customer. The email notifications will be sent to the customers and the CC email (say, the sales rep users.)

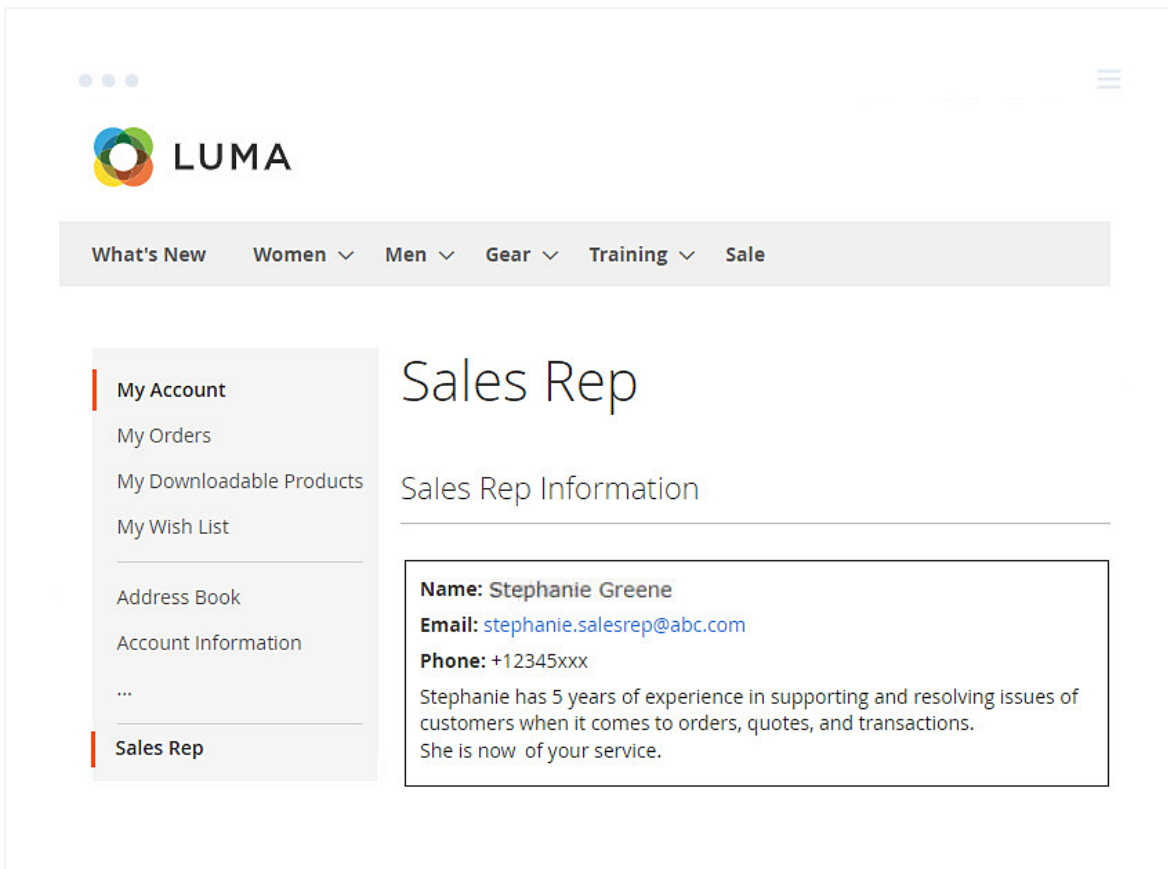


and ...



2.5 My Account Dashboard, Sales Rep user's view, and Admin Sales Rep user's view

2.5.1 My Account Dashboard

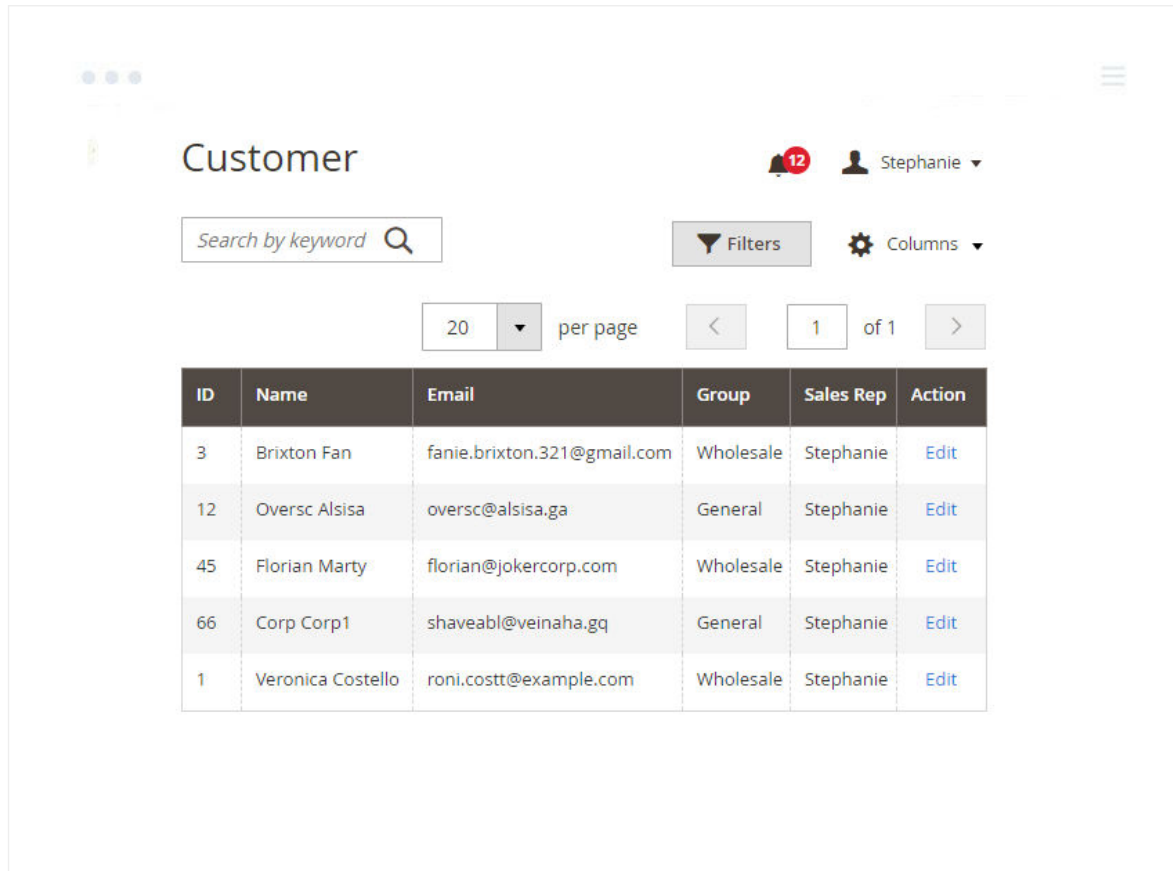


When a sales rep user is successfully assigned to a customer. She/He now can check the information of the sales rep user under **My Account**.

2.5.2. Sales Rep user's view

As we mentioned, the Sales Rep user now can access the information of assigned customers and take actions accordingly.

In the **Customers** grid:



The screenshot shows a web interface for a 'Customer' grid. At the top, there is a search bar with the placeholder text 'Search by keyword' and a magnifying glass icon. To the right of the search bar are buttons for 'Filters' and 'Columns'. Below the search bar, there is a pagination control showing '20' in a dropdown menu followed by 'per page', and '1 of 1' with left and right navigation arrows. The main content is a table with the following data:

ID	Name	Email	Group	Sales Rep	Action
3	Brixton Fan	fanie.brixton.321@gmail.com	Wholesale	Stephanie	Edit
12	Oversc Alsis	oversc@alsisa.ga	General	Stephanie	Edit
45	Florian Marty	florian@jokercorp.com	Wholesale	Stephanie	Edit
66	Corp Corp1	shaveabl@veinaha.gq	General	Stephanie	Edit
1	Veronica Costello	roni.costt@example.com	Wholesale	Stephanie	Edit

Customers under Sales Rep user's view

In the **Orders** grid:

Orders 12 Stephanie

[Create New Order](#)

Search by keyword

Actions per page of 1

<input type="checkbox"/>	ID	...	Bill-to Name	Ship-to Name	Grand Total (Base)	Status	Sales Rep	Action
<input type="checkbox"/>	00005	...	Jang Chou	Test Developer	\$40.00	Complete	Stephanie	View
<input type="checkbox"/>	00004	...	mark mcnatt	mark mcnatt	\$27.40	Pending	Stephanie	View
<input type="checkbox"/>	00003	...	Veronica Costello	Veronica Costello	\$53.71	Pending	Stephanie	View
<input type="checkbox"/>	00002	...	Dav Nguyen	Veronica Costello	\$39.64	Closed	Stephanie	View
<input type="checkbox"/>	00001	...	Veronica Costello	Veronica Costello	\$36.39	Processing	Stephanie	View

Orders under Sales Rep user's view

In the **Quotes** grid:

Manage Quote 12 Stephanie

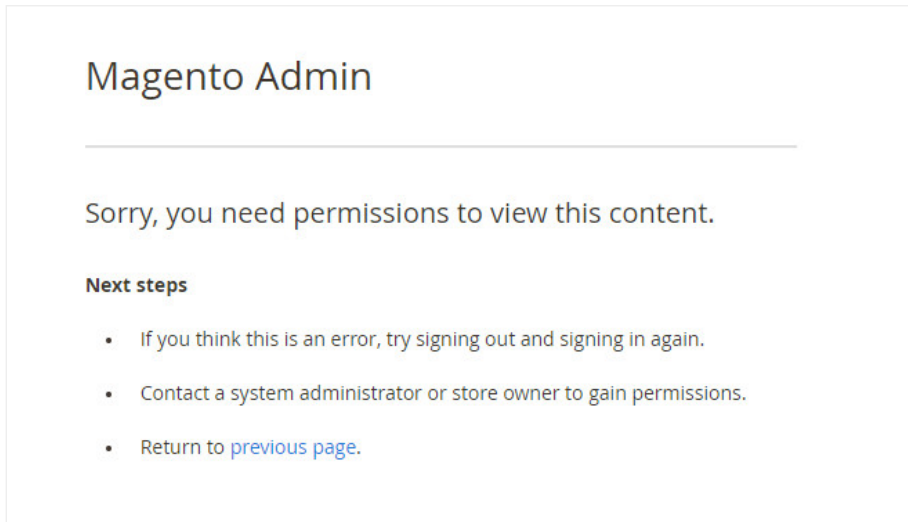
<input type="checkbox"/>	Status	Total	Customer Email	...	Expiry Date	Sales Rep	Action
<input type="checkbox"/>	Closed	\$119.00	juhamiet@gmail.com	...	May 8, 2020 7:00:00 AM	Stephanie	Edit
<input type="checkbox"/>	Ordered	\$40.00	sbtestdeveloper@gmail.com	...	May 6, 2020 7:00:00 AM	Stephanie	Edit
<input type="checkbox"/>	Updated	\$177.00	thanhnt@bsscommerce.com	...	May 6, 2020 7:00:00 AM	Stephanie	Edit
<input type="checkbox"/>	Updated	\$40.00	mark@gmail.com	...	Jan 10, 2020 7:00:00 AM	Stephanie	Edit
<input type="checkbox"/>	Updated	\$383.88	roni_cost@example.com	...	May 6, 2020 7:00:00 AM	Stephanie	Edit
<input type="checkbox"/>	Updated	\$297.28	roni_cost@example.com	...	Jan 8, 2020 7:00:00 AM	Stephanie	Edit
<input type="checkbox"/>	Resubmitted	\$394.70	roni_cost@example.com	...	Jan 8, 2020 7:00:00 AM	Stephanie	Edit
<input type="checkbox"/>	Closed	\$618.13	roni_cost@example.com	...	Jan 8, 2020 7:00:00 AM	Stephanie	Edit

Quotes under Sales Rep user's view

2.5.3 Admin Sales Rep user's view

The Admin Sales Rep user can also access the information of customers assigned to all sales reps. However, they can only view the information and can't take further action.

Please note that the Admin Sales Rep users can not create or view customers, orders, and quotes. When clicking on **Create New Order** or on action **View/Edit**, the Admin Sales Rep users are redirected to an error page.



Error page

In the **Customers** grid:

<input type="checkbox"/>	ID	Name	Email	Group	Sales Rep	Action
<input type="checkbox"/>	13	Xiao Lin	xiao.lin@gmail.com	General	Tai	Edit
<input type="checkbox"/>	11	Halu Song	hailuuphl@gmail.com	General	Scarlette	Edit
<input type="checkbox"/>	19	Oswaldo Hirthe	hskiles@horsestore.com	Wholesale	Tai	Edit
<input type="checkbox"/>	3	Brixton Fan	fanie.brixton.321@gmail.com	Wholesale	Stephanie	Edit
<input type="checkbox"/>	1	Veronica Costello	roni_cost@example.com	Wholesale	Stephanie	Edit
<input type="checkbox"/>	45	Florian Marty	florian@jokercorp.com	Wholesale	Stephanie	Edit

Customers under Admin Sales Rep user's view

In the **Orders** grid:

Orders

12 Rosie

Create New Order

Search by keyword

Filters Columns

Actions

ID	Bill-to Name	Ship-to Name	Grand Total (Base)	Status	Sales Rep	Action
00005	Jang Chou	Test Developer	\$40.00	Complete	John Doe	View
00004	mark mcnatt	mark mcnatt	\$27.40	Pending	Tai Chen	View
00003	Veronica Costello	Veronica Costello	\$53.71	Pending	Stephanie	View
00002	Dav Nguyen	Veronica Costello	\$39.64	Closed	Stephanie	View
00001	Veronica Costello	Veronica Costello	\$36.39	Processing	John Doe	View

Orders under Admin Sales Rep user's view

In the **Quotes** grid:

Manage Quote

12 Rosie

Filters Columns

Status	Total	Customer Email	Expiry Date	Sales Rep	Action
Pending	\$119.00	hailuuphl@gmail.com	May 8, 2020 7:00:00 AM	Scarlette	Edit
Pending	\$40.00	xiao.lin@gmail.com	May 6, 2020 7:00:00 AM	Tai	Edit
Updated	\$177.00	thanhnt@bsscommerce.com	May 6, 2020 7:00:00 AM	Stephanie	Edit
Updated	\$40.00	mark@gmail.com	Jan 10, 2020 7:00:00 AM	Stephanie	Edit
Updated	\$383.88	roni_cost@example.com	May 6, 2020 7:00:00 AM	Stephanie	Edit
Updated	\$297.28	roni_cost@example.com	Jan 8, 2020 7:00:00 AM	Stephanie	Edit
Resubmitted	\$394.70	roni_cost@example.com	Jan 8, 2020 7:00:00 AM	Stephanie	Edit
Closed	\$618.13	roni_cost@example.com	Jan 8, 2020 7:00:00 AM	Stephanie	Edit

Quotes under The Admin Sales Rep user's view

3. API Support

BSS is now providing several API heads to help you use our extension better & faster!

3.1 GraphQL API

Documented by this sheet: <https://docs.google.com/spreadsheets/d/15Ag4zkzZgVVGyxX81YpPa4-CpClIeW2VePfs7dTqVWg/edit#gid=1352792312>
(<https://docs.google.com/spreadsheets/d/15Ag4zkzZgVVGyxX81YpPa4-CpClIeW2VePfs7dTqVWg/edit#gid=1352792312>)

3.2 RESTful API

Check out this document and learn how to run API for Magento 2 Sales Rep extension:

<https://docs.google.com/spreadsheets/d/15Ag4zkzZgVVGyxX81YpPa4-CpClIeW2VePfs7dTqVWg/edit#gid=634616155>
(<https://docs.google.com/spreadsheets/d/15Ag4zkzZgVVGyxX81YpPa4-CpClIeW2VePfs7dTqVWg/edit#gid=634616155>)

Updated on March 31, 2022