

Sales Rep Group Link

This option allows you to link a sales representative to a specific item group when creating a sales document.

Creating a Sales Rep Item Group Template

This allows one to setup a template for Item groups to Sales Rep, this template is used to populate against the customer

Debtors > Configuration > Sales Rep Item group Template

Click "**Add**"

The screenshot shows the 'Sales Rep Item Group Template' configuration interface. On the left, the 'Debtors Module' is selected, and under 'Configuration', 'Sales Rep Item Group Template' is highlighted. The main area features a search bar, an 'Add' button (highlighted with a red box), and 'Edit' and 'Delete' buttons. Below these are input fields for 'Code' and 'Description'. At the bottom, a table displays the current configuration:

#	Code	Description	Active
1	Labels	Labels	1

- Add "**Code**"
- Add "**Description**"
- Click "**Save**"

Sales Rep Item Group Template setup

Code:General Sales

Description:General Sales

Active:☒

Page 0 of 0

Add

Edit

Delete

No data to display

#	Group Code	Group Name	Rep Name
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Save & Close

Save

Close

- Click "**Add**"
- Select "**Group Code**"
- Select "**Sales Rep**"

Sales Rep Item Group Template setup

Code: General Sales

Description: General Sales Active: ☒

Page 0 of 0 Add Edit Delete No data to display

#	Group Code	Group Name	Rep Name
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Group to Sales Rep setup

Item Group: HWARE - Hardware

Sales Rep: Malcolm

Save & New Save & Close Close

Save & Close Save Close

- Click "**Save & Close**" or "**Save & New**" to Save or add another Template

Sales Rep Item Group Template setup

Code:

General Sales

Description:

General Sales

Active:

☒

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Add

Edit

Delete

Displaying 1 - 1 of 1

#	Group Code	Group Name	Rep Name
1	HWARE	Hardware	MG

Save & Close

Save

Close

Activate the link between the Sales Rep and Item group

Debtors > Configuration > Debtor Setup

- Search for and open your customer
- Double-click on the customer record
- Click the **Standard** dropdown (top right of the screen)
- Select **Rep Code to Group Code**

Edit Debtor

Debtors Details

Attachment Memo Create Reminder Debtor Enquiry View Attachments Function Standard Alerts Close

Code : **ABC0010** Debtor Name : **ABC Company**

Details Address Contacts Account Details Gen Details Statutory Info

Code: ABC0010
 Name: ABC Company
 Trading As: 123 Co
 Short Name: ABC
 Commission: Dealer
 Contacts: John Doe
 Company Registration No: 2000/123456/23
 VAT No.: 123456789
 Website: www.abccompany.co.nz
 Print Statement: ☒ Email Statement: ☒
 Active: ☒ Is Head Office: ☐
 Sync To Mobile: ☒ Enforce Commission Rep.: ☐
 Debtor Image: abc-logo

Division: Executive Division E: ☐ Acc Manager: Malcolm Granville
 Region: E: ☐ Billing Group:
 Status: Partner:
 Category: Debtor Type: Debtor

Linked Brands List: BRICK,HARDWARE,MAKEUP,BEAUTY-DRK,PLUMBING,PUMPS,SUPP,AIRBNB,Daisy,ADMIN,CHOOKS,
 Linked Head Office: ,

Save & New Save & Close Save Close

Debtor Settings
 Company Profile Branches
 Branch Link (Tick Is Head Office first)
 Branch Ledger Accounts
 Linked Brands
 Support Task
 Linked Inventory
 Linked UOM
 PDF Password & SMS
 Rep Code to Group Code

Tick the "**Activate**" Box

Click "**Add**"

If this option is not active, the system will assign the default sales representative to the document.

When enabled, the sales document will check the customer and the stock item's group, then override the sales representative on the item line. This means each line item on the document can have a different rep code assigned.

Sales document will check customer, stock item on the group and then override the sales rep on the Item line

This means that per line item can have a different rep code

Function update

Function to update all document lines with sales reps based on group sales reps

Documents to have this rule:

- Quote
- Sales Order
- Invoice
- Credit note

AttachmentsMemoCreate ReminderQuote HistoryInfoFunctionsImportApproval Options

Quote

Quote DetailAddressExtrasLink

Quote Number: QT291

Debtors: 1234567

Debtors Name: Malcolm new company

Sales Rep: Dealer

Quote Date: 2025-05-27

Valid Until Date: 2025-06-03

Delivery Date: 2025-06-03

Quote Status:

Description:

Reference:

Order Number:

Currency View:

Exchange Rate:

Comment:

Items

Page 1 of 1

Paging

Add

Note

#	Seq. No	LS	Status	Type	Code	Description
1	1			Stock	PEN507	Pen Blue

Update sales rep lines to Group rules

DocsCus

Save

Close

Print Quote

Job Card

Service Card

T & Cs

Footer

Promotion Value: 0.0000

Clear Discount

Discount %: 0

Amt: 0.00

Service Month: May

Internal Contact: Malcolm Granville

Pricing Analysis

Margin %

Mark-up %

Cost Ex GST

Profit

23.0779

30.0000

58.3300

17.50

Total

Selling

Sub Total

Less Discount

Ex GST

GST

Inc GST

Deposit

75.83

0.00

75.83

11.38

87.21

0.00

Webatar quote update sales reps per line

Button added to update sales reps per line based on rules for customer for Item Group to Sales Rep

Webatar

Quote Details

Quote Items

Rep Lines

Discount

General Details

Show Deals

Quote Items

Special Items

Photos

Attachments

Email To Self

Order

Cancel

Line 1
PEN507
Pen Blue
Malcolm
5.00 x 3.00 15.20
Discount -
Total Including - 87.40

Tax - 11.40

5

Sales Rep

Checks the server and assigns the sales reps per line

Sub-Total:	15.20	Ex GST:	76.00
Less Discount:	0.00	GST:	11.40
Total Qty:	5.00	Total:	87.40

1.1.13 (2026-01-08)

Logged in as: Malcolm Granville

Sales rep per line

When the quote is created, the sales rep is taken from the general details default sales rep

Webatar

☰

Quote Details

←

Quote Item

✓

Item Accessories

General Details

Show Deals

Quote Items

Special Items

Photos

Attachments

Email To Self

Order

Cancel

Line Quantity:

5

−

+

Line Discount:

0

Total Excl: 76.00

Total Incl: 87.40

Warehouse:

Master Warehouse

GST:

01 Invoice GST

Sales Rep

Malcolm

Copy long description

Notes:

Quantity Query

✓

Value

0.4

0.2

−0.0

−0.2

−0.5

Warehouse

On Shelf

Reserved

1.1.13 (2026-01-08)

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