Sales Rep Change on Processed document

System allows one to change the Sales Rep on processed invoices and completed quotes.

To make the change you go to the processed document searches.

Invoices

Debtors Module > Analysis > Document History

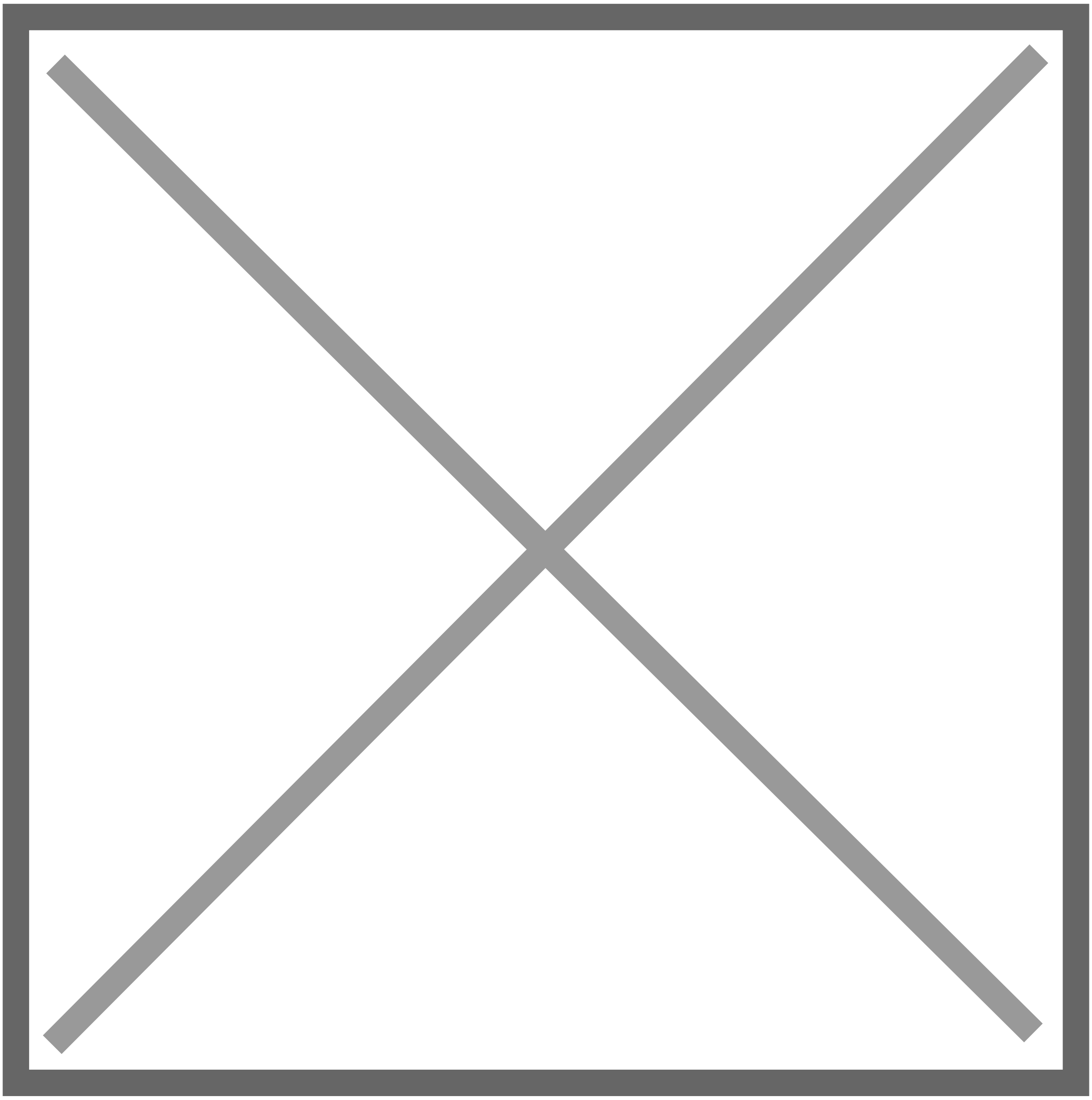
Quotes

Debtors Module > Analysis > New Quote Search

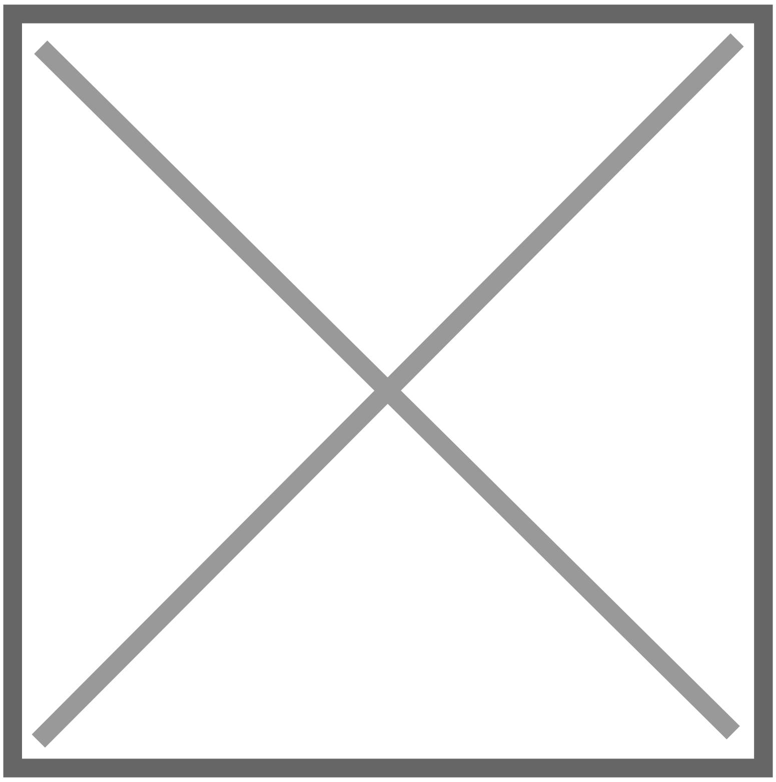
Find the invoice that you want to change the rep.

Edit the document and go to the section for Sales Rep

You will notice a Question mark next to the Sales Rep



After clicking on the Question mark, change the rep and click on save



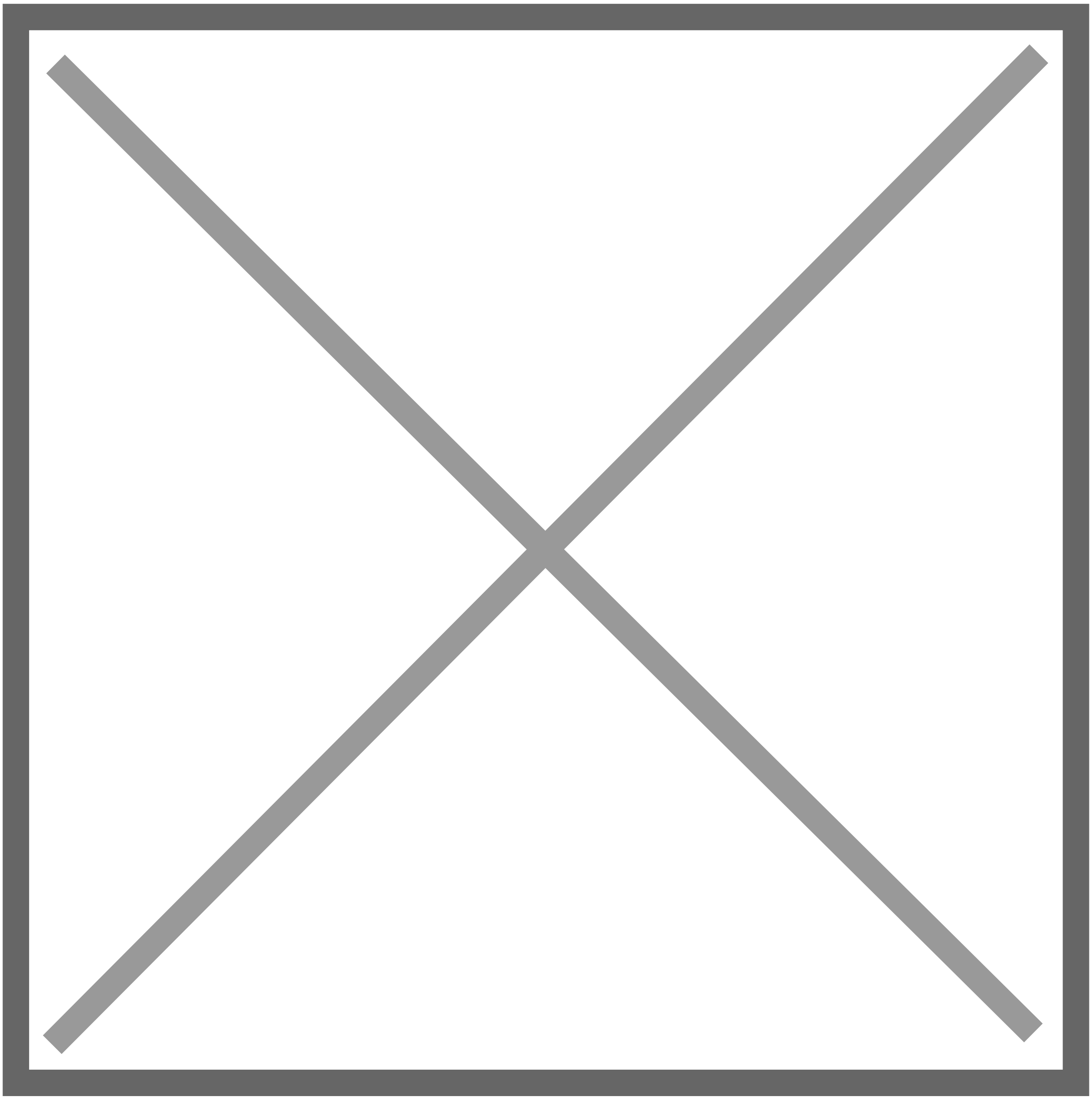
Sales rep is now updated.

User Audit trail

We keep a user audit log of all changes.

Go to System Configuration > Reports > User Access Report

Search for the user



The same process works for quotes that have been completed

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