How-to Setup a Sales Rep in FocusPoint

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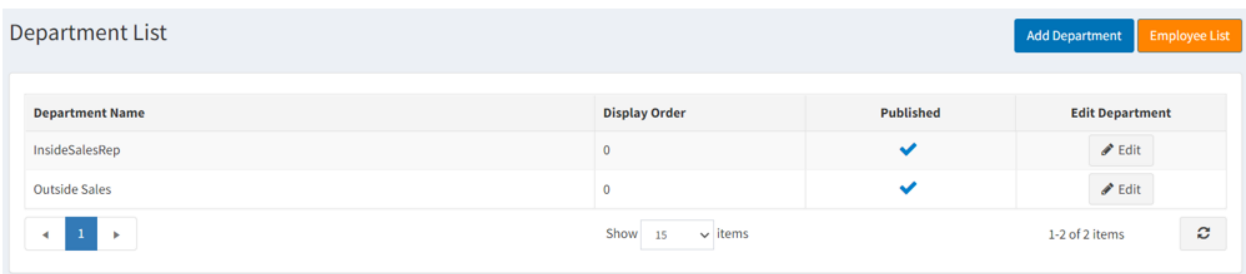
1. Department List

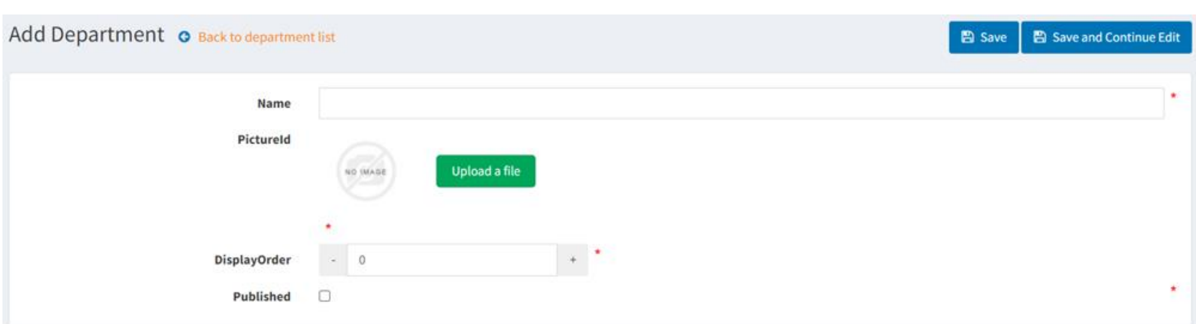
Department List is where all store departments are stored in FocusPoint. To manage the Department List, go to *Content Management > Department List*



2. Adding a new Department

Click the 'Add Department' button

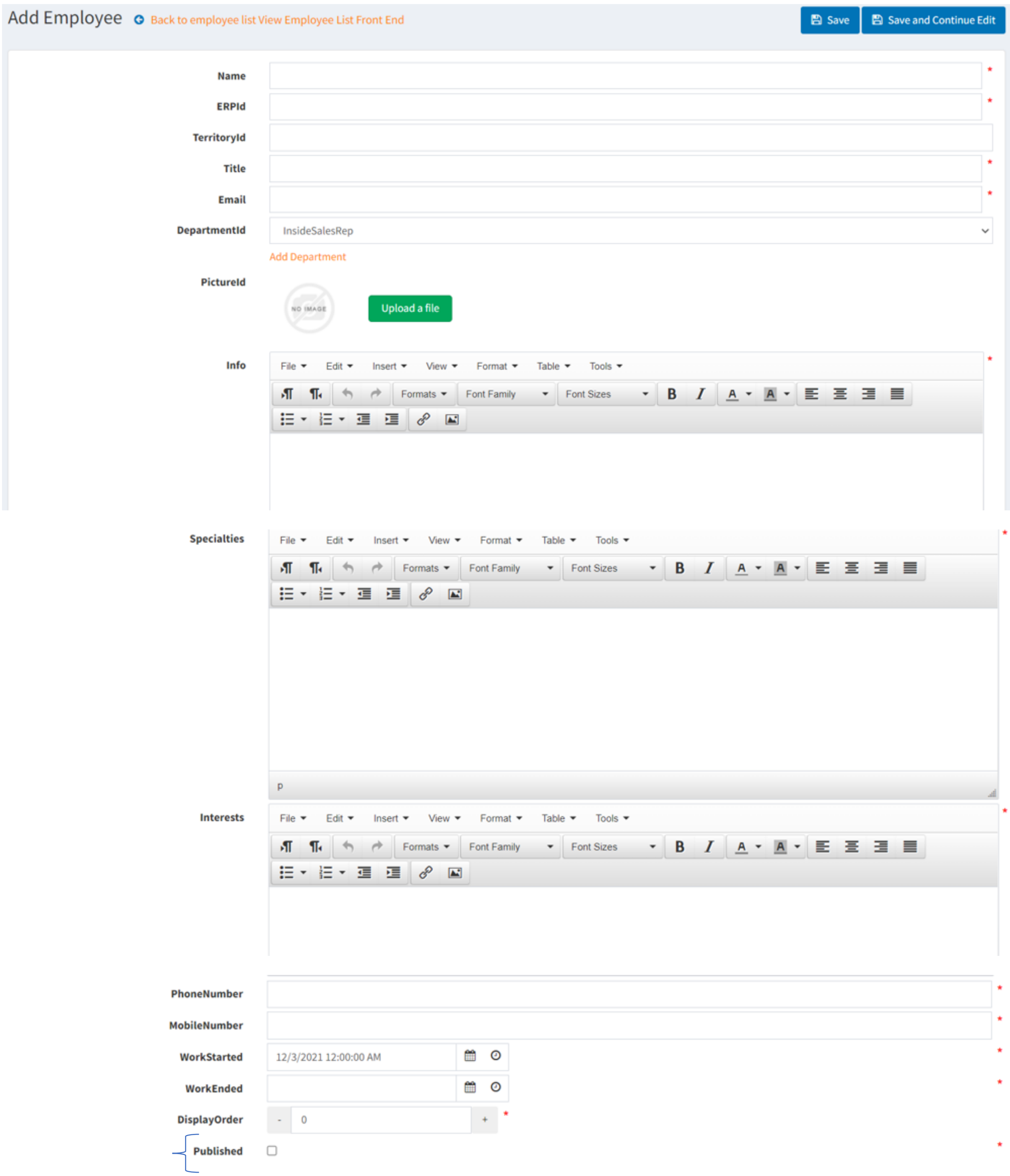
- Fill out Name field, i.e. Sales Reps (required)
- There is an option to add a PictureId to the department (not required)
- There is an option to set the display order in which it appears on FocusPoint
- To enable the department, check the box for Published
- Click Save at the top of the page



3. Add employees to the Employee List

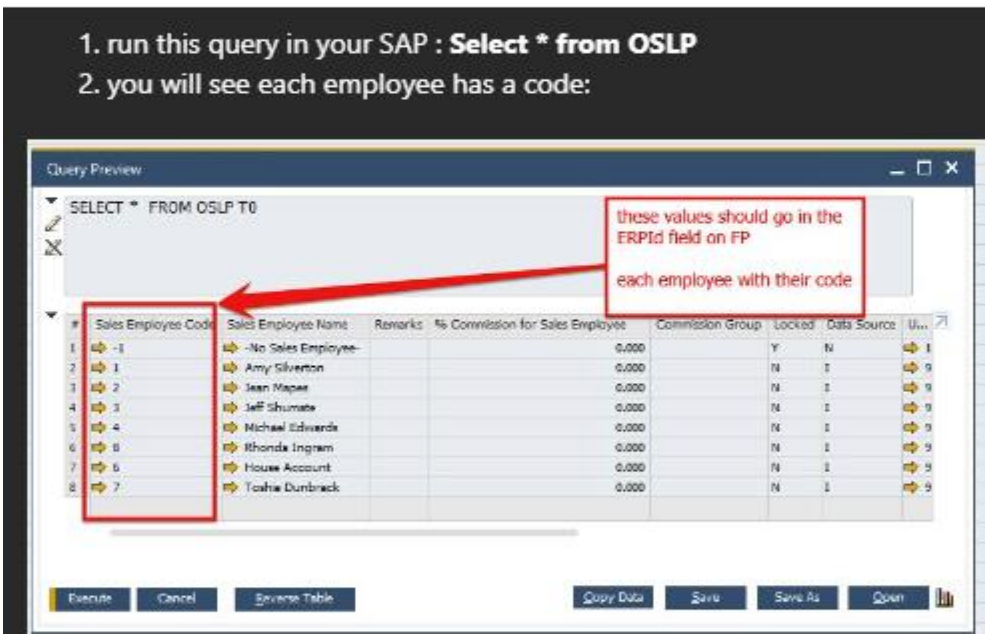
The Employee List is where all sales reps are stored in FocusPoint. To manage this list, go to *Content Management > Employee List*

- Click the Add Employee button to see the following details to complete:



- Enter Employee Name - required
- Enter ERPId (Employee ID) - required
- Enter TerritoryId (if applicable)
- Enter Job Title - required
- Enter Email address - required
- Select DepartmentId from dropdown list (to learn how to create a department list, click here)
- Enter additional employee info - optional
- Enter employee specialties - optional
- Enter employee interests - optional
- Enter employee phone number and mobile number - optional
- There is an option to enter date of work start and ended - optional
- **Check the box for Published to have the employee displayed on the site**
- Click the Save button at the top of the screen

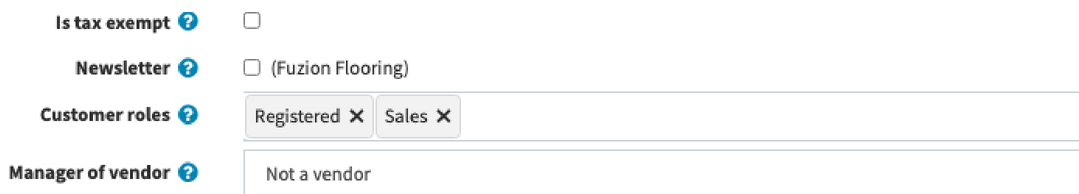
- For ERPid:



Once your employees have been added to the Employee List, you must also add them to the Customer List.

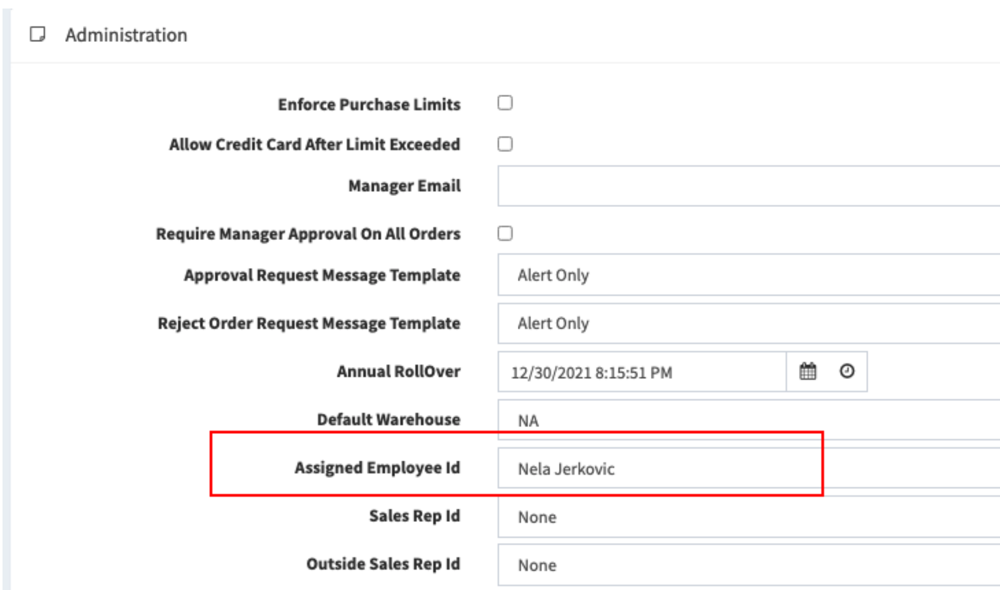
In addition to adding a 'Customer Role' i.e. "Sales" or "Reps" in your Customer Role table, sales employees must be added as a customer to the customer table in FocusPoint.

a. After adding your sales/reps to the customer list, be sure to add their designated customer role, i.e. 'Sales' or 'Reps'



b. ***Assigned Employee Id** - Select the Sales Rep employee's own name from the dropdown (i.e. If you are setting up a sales rep for Customer Name select their name from the dropdown)*

More information on our User Guide site: https://docs.focusedimpressions.com/employee-list



4. Additional Field Mapping is needed in SAP and FP.

To access this, you will go through *SAP Integration > Additional Field Mapping* and click to +Add New

<u>FP Mapping Details</u>

- SAP Field Name = SalesRepId (check in SAP first for this name)
  i. Note: this field must line up to the XML field name which comes from SAP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<AdditionalField id="SalesRepId" type="STRING">31</AdditionalField>
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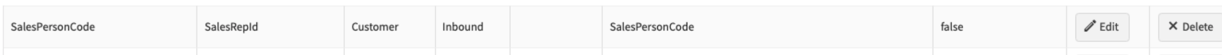
- FocusPoint Field Name = SalesRepId
- Entity Name = Customer
- Direction = Inbound
- Formula = SalesPersonCode

Here is what the completed field mapping information will appear after you edit the details in the new field.

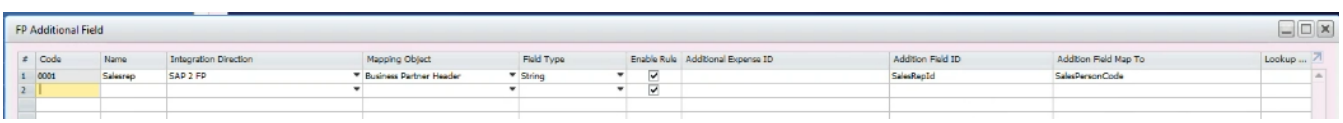


SalesPersonCode	SalesRepId	Customer	Inbound		SalesPersonCode	false	Edit	Delete

Within SAP, you will go to *Tools > User Defined Windows > MITI_Additional Field Mapping*

<u>SAP Mapping Details</u>

- Code: Enter any number, i.e. 0001
- Name: General name of the mapping information field
- Integration Direction: SAP 2 FP
- Mapping Object: Business Partner Header
- Field Type: Spring
- Enable Rule: this should be checked
- Additional Expenses ID: leave blank
- Addition Field ID: SalesRepId (Validate name per customer)
- Addition Field Map To: SalesPersonCode



FP Additional Field

#	Code	Name	Integration Direction	Mapping Object	Field Type	Enable Rule	Additional Expense ID	Addition Field ID	Addition Field Map To	Lookup ...
1	0001	Salesrep	SAP 2 FP	Business Partner Header	String	✓		SalesRepId	SalesPersonCode	
2						✓				

5. Web Enablement and Validation of BPs

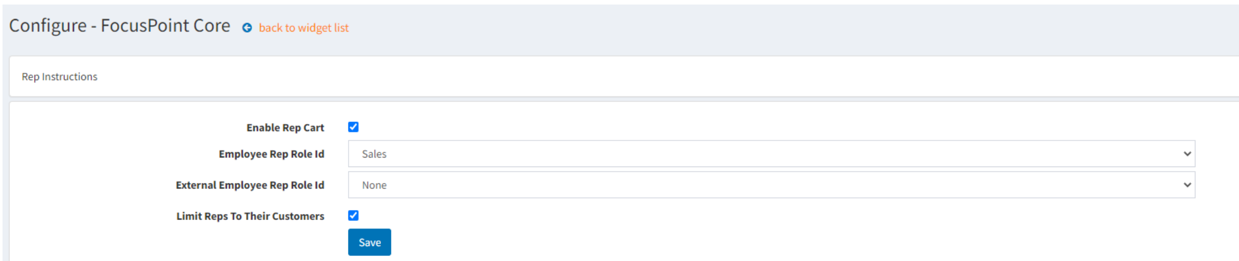
a. In SAP, you must also Web Enable and Web Validate any of the BP's that you want their Sales reps to be able

   i. Contacts within BPs must have email addresses in order to web-value and web-enable as "Yes" and push over to FocusPoint

6. Set Up Rep Carts in FocusPoint-For your Delivery Manager

- Lastly, your Delivery Manager will set the "Sales role" by going into FocusPoint > Administration > Rep Settings and select 'enable rep cart', add 'Sales' to Employee

Rep Role Id, and if you want to limit reps to their customers, they will enable the checkbox as well:



Please communicate when you are ready for them to do this.

More information about rep settings can be found here:
https://docs.focusedimpressions.com/focuspoint-administration-rep-settings

How To Setup: Sales Rep Places an Order in FocusPoint

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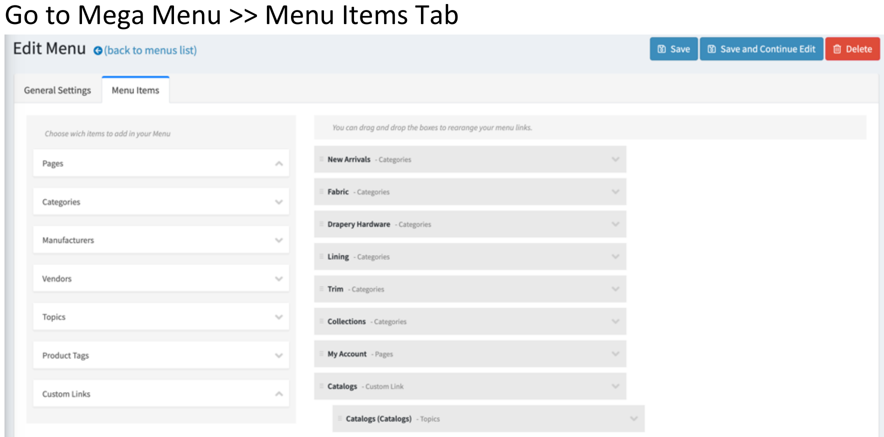
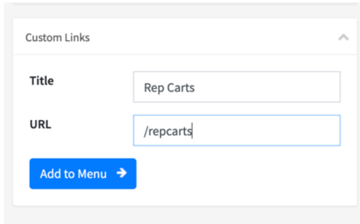
7. Adding Rep Carts to the Navigation

After you set up your Sales Rep Mappings in SAP and FocusPoint (See How-To Setup a Sales Rep in FocusPoint), the sales rep will then be able to place orders for their customers through front end impersonation. Step 1 is to add the Rep Carts link to the navigation bar.

a. Go to Mega Menu >> Menu Items Tab

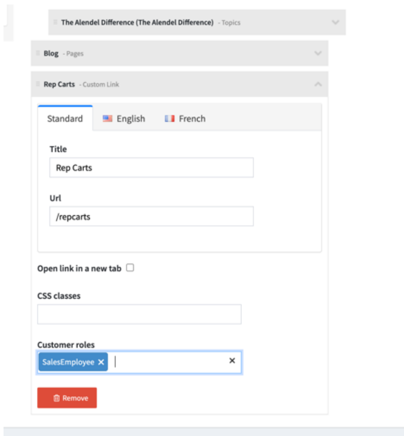


b. Add a new Custom Link



Title: Rep Carts
URL: /repcarts
Add to Menu

c. Once the Rep Carts link is over in the right menu column, open the accordion and add a customer role to the menu item



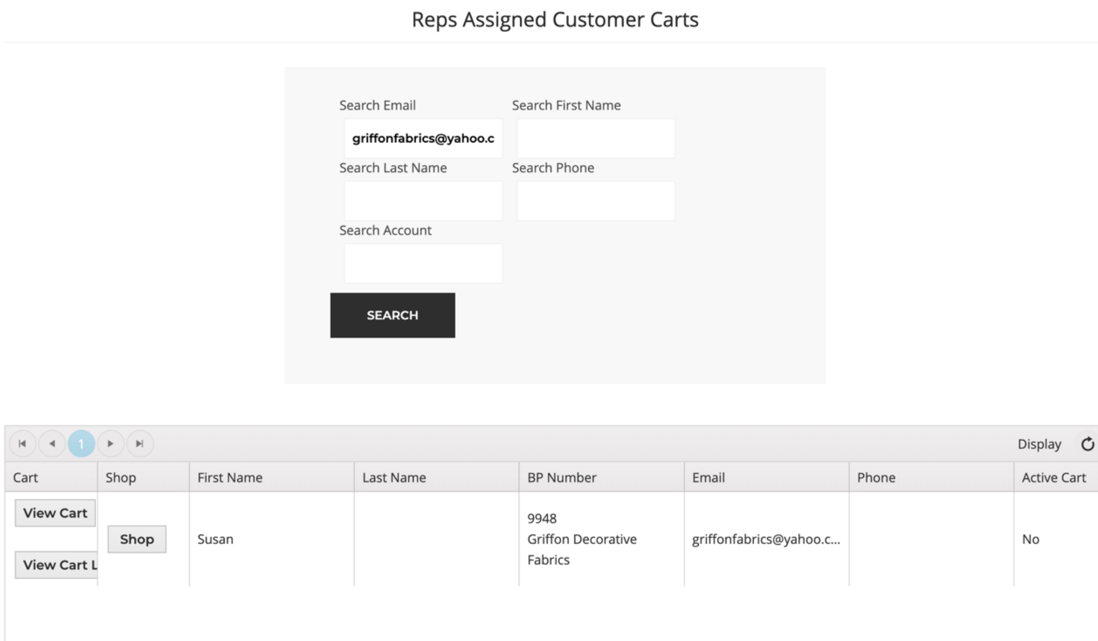
i. This will be the same role you used for the sales reps (ie. Sales / SalesEmployee)
ii. This will then restrict the menu item so this link is only seen by the sales reps

8. How Reps Place Orders for their Customers

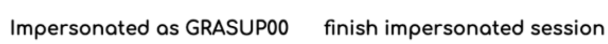
When a sales rep logs into your FocusPoint eCommerce site, they will go to the Rep Carts page (via the link in the menu)

Rep Carts - Shop

a. Search for the customer via email, Name, Phone or BP Account number



b. Click the Shop button to begin the impersonation session starting at the home screen, where you will see the customers products, pricing, addresses at checkout.
c. Either add items to the cart or place a full order for the customer
d. When finished be sure to hit “finish impersonation session” on the top header



Rep Carts - View Cart

a. Search for the customer via email, Name, Phone or BP Account number
b. Click view cart – this will take you directly into the customers cart
c. When finished be sure to hit “finish impersonation session” on the top header

Rep Carts - View Cart List

a. If a FocusPoint site uses multi cart functionality (the ability to have multiple carts with a save feature) you can view a customers cart list(s) by clicking “view cart list”
b. Search for the customer via email, Name, Phone or BP Account number
c. Click view cart list – this will take you directly into the customers cart list
d. Select a cart to edit or checkout with
e. When finished be sure to hit “finish impersonation session” on the top header