

October 2010

Tip of the Month

Printing Salesperson Name, Phone Number, and Email on Quotes and Invoices

You can easily configure the system to have your salesperson's name, phone number, cell number, and even email address print on quotes and invoices. This is a simple and effective way to make it easier for customers to reach the person who assisted them.

From IntelliDealer, navigate to Configuration >> CRM >> Profile >> Salespeople. You will need to edit each of your salespeople (Figure 1) to add additional contact info such as phone number, cell number and email address.

Figure 1

Salespeople

Code: AB

Name: Andy Bernard

Search Location: 01

Phone Number: (555)111-2222

Cell Number: (555)333-4444

Email Address: bernard@chasetractor.com

Active for System:

Save Copy Save & Next Close

The next step is to configure your Invoice and Quote messages. From IntelliDealer, navigate to Configuration >> General Ledger >> General >> Invoice/Quote Messages. You will need to configure the message using a special format that uses variables in order to have the salesperson information printed on the quote/invoice (Figure 2). The variables tell the system where in the message to insert the contact info. The pound symbol (#) determines how many characters of the field to print.

Figure 2

Select Location: 01 London Ont

Parts Invoice Message

Your parts advisor today was: &SMN#####
Cell: &CEL#####
Email: &EML#####

Save Close

The variables that can be used are:

- &SMN = Salesperson Name
- &PHN = Salesperson Phone Number
- &CEL = Salesperson Cell Number
- &EML = Salesperson Email Address

After the setup is complete, your quotes and invoices will now print with the contact info in the message (Figure 3).

Figure 3

Customer Picked Up	London Ontario	CNNYYY							
	08/20/10 15:36:54 (O)	01							
	SMITH007 000 0000000	B20317							
Joe Smith									
101 Maple Drive									
London, ON									
		AB							
ORDER#: 265566									
Your parts advisor today was: Andy Bernard									
Cell: (555)111-2222									
Email: bernard@chasetractor.com									
Part#	DESCRIPTION	Bin	ORD	ISS	SHP	B/O	UTT	Price	Amount
AA22837	SEAL KIT	026951	2	2	2			94.62	189.24
T19044E	OIL FILTER E	026951	2	2	2			2.33	4.66
	BINS: TEST								
								TOTAL CASH	193.90