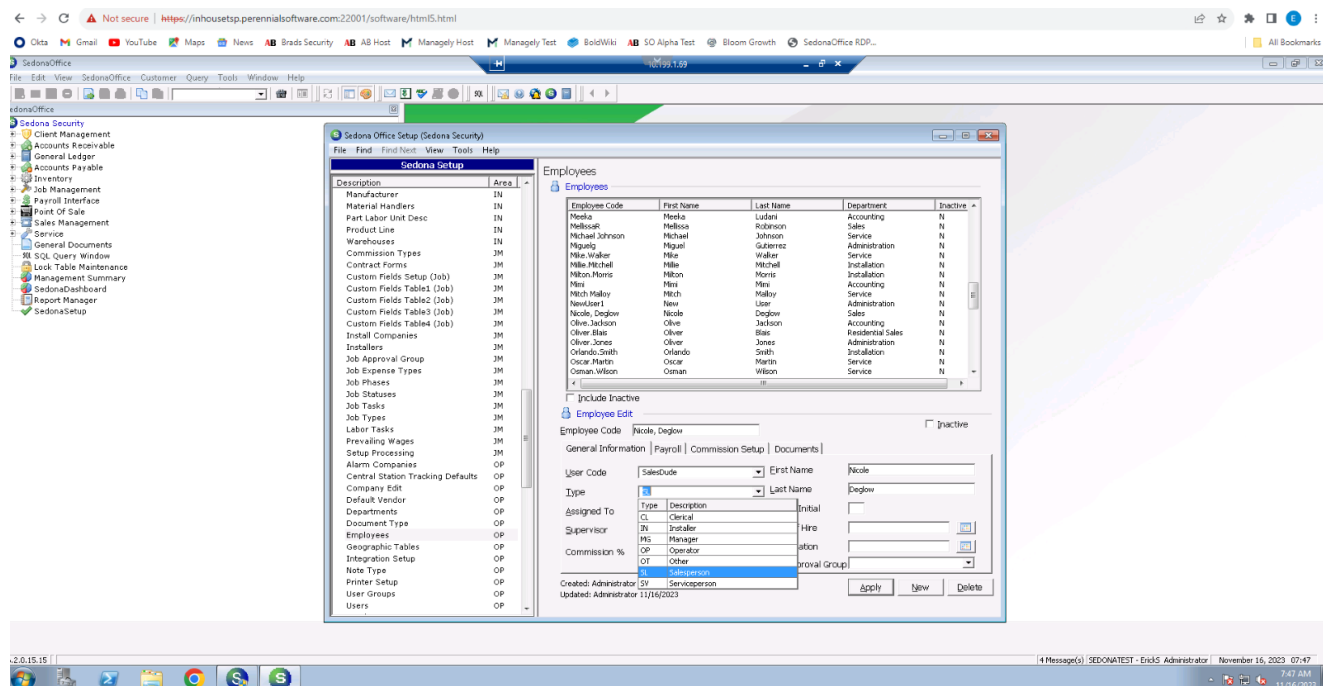


How to make a SO employee selectable in the SedonaOffice Salesperson dropdown in SA

04/29/2024 10:32 am EDT

When creating an employee in Sales Automation you will see a menu titled SedonaOffice Salesperson. The steps below will show you what needs setup so that the employee will appear in this drop-down.

- 1) Log into SedonaOffice and go into Sedona Setup
- 2) Go into Employees, click on the employee in question, and in the 'Type' drop-down select SL.



- 3) Go into Sales Automation, click on Setup, and then employees.
- 4) Click on the pencil icon to the right of the employee in question.
- 5) Click on the SedonaOffice Salesperson drop-down and the salesperson will be selectable.

SO AlphaTest

123 Testing Way
Canton, MI 48187

Lead: Name or Phone #

New Lead

New Quick Quote

New Proposal

Dashboard

Leads

Proposals

Calendar

Reports

Setup

Erick

Sales Automation

Support Center

Tasks

Logout

Edit Employee - Deglow, Nicole

CancelSave

Linked User: NDeglow - Deglow, Nicole

First Name: Nicole

Last Name: Deglow

Middle Initial:

Address:

Address

Address 2

CityStateZipPlus 4

Phone: (608) 279-6682ext.

Cell:

Text Notifications:Select Carrier:

Email: nicole.deglow@boldgroup.com

Employee Number:

Employee Since:

Job Title: DA BOSS

Description:

Technician:Salesperson:

Inactive:Inactive Date

Picture:

Upload:Select files...Drop files here to upload

SedonaOffice Salesperson:Select SedonaOffice Salesperson

SedonaOffice Tech:Select SedonaOffice Salesperson

Sales Quote:123456789025, 1234567890431
Smith, Liz
Bonnie, Bonnie
User, Tech
Lupo, Jeslynn
Deglow, Nicole

DepartmentsNotes

Add

Department

Nicole Deglow

1

1 - 1 of 1 items

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