

Permanent customer self assignment on iOS/Android

How is this feature going to help you?

Enable field users to self-assign customers permanently and temporarily.

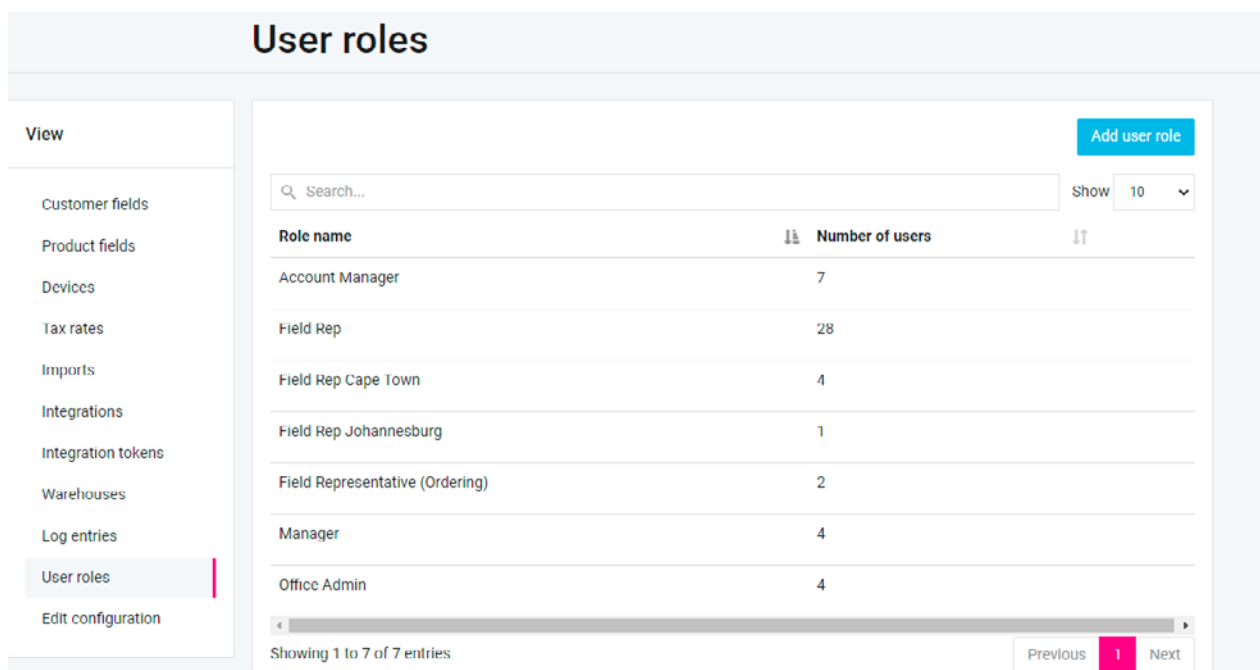
How does it work?

If the self-assign customers setting key/switch is disabled, the user should see the second message directly (This customer is not assigned to you. Please contact your manager for more info) when tapping on a self-assign customer instead of "No and Yes" prompt.

If the setting is enabled the user will be able to choose to either permanently or temporarily assign the customer to their profile.

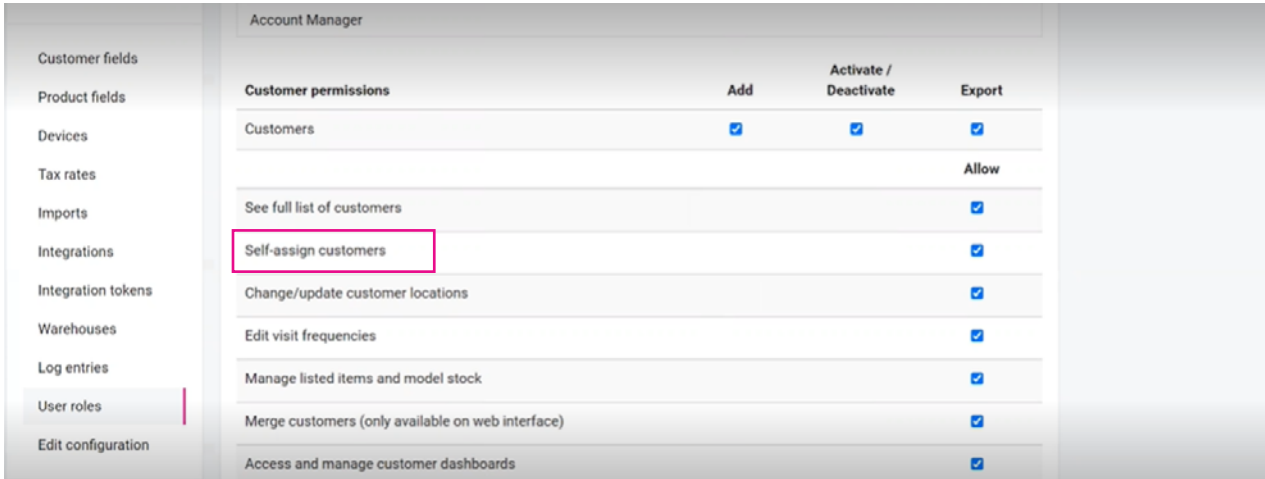
How to give access using permissions

1. Access the user roles



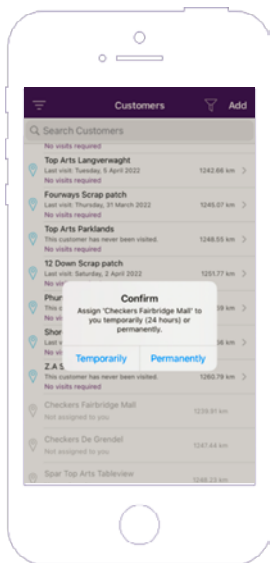
Role name	Number of users
Account Manager	7
Field Rep	28
Field Rep Cape Town	4
Field Rep Johannesburg	1
Field Representative (Ordering)	2
Manager	4
Office Admin	4

2. Ensure the permission to self-assign is allowed



The screenshot shows the 'Account Manager' interface with a table of permissions. The 'Self-assign customers' row is highlighted with a red box. The table has columns for 'Add', 'Activate / Deactivate', and 'Export'. The 'Export' column has an 'Allow' label at the top right.

Customer permissions	Add	Activate / Deactivate	Export
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
See full list of customers			<input checked="" type="checkbox"/>
Self-assign customers			<input checked="" type="checkbox"/>
Change/update customer locations			<input checked="" type="checkbox"/>
Edit visit frequencies			<input checked="" type="checkbox"/>
Manage listed items and model stock			<input checked="" type="checkbox"/>
Merge customers (only available on web interface)			<input checked="" type="checkbox"/>
Access and manage customer dashboards			<input checked="" type="checkbox"/>



3. Once the permission is granted the field user will now be able to see two options when self-assigning a customer on the field application

In order for this feature to fully function the mobile device requires to be fully connected to the internet. If you're not connected you will receive an error message.

Please note:

If a manager user has permission to apply changes, they will be able to set these changes under the user role settings
Account Managers will have full access to apply these changes

Get in Touch

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