



How to Create, Edit and Delete Agent.

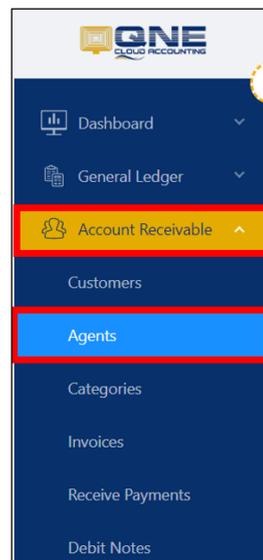
Overview:

Agent is a form where you can maintain the *Sales Person*, a person whose job is to sell products and services in the company. This function is useful for generating various reports related to Accounts Receivable.

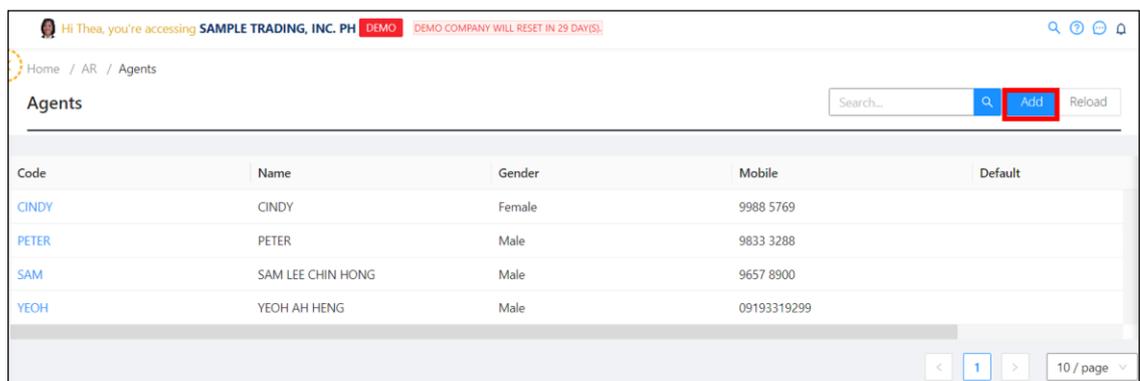
Procedure:

How to Create Agent

1. Go to the **Navigation pane > Account Receivable > Agents**



2. In the **Agent List View**, click **Add**



Hi Thea, you're accessing **SAMPLE TRADING, INC. PH** DEMO DEMO COMPANY WILL RESET IN 29 DAY(S)

Home / AR / Agents

Agents

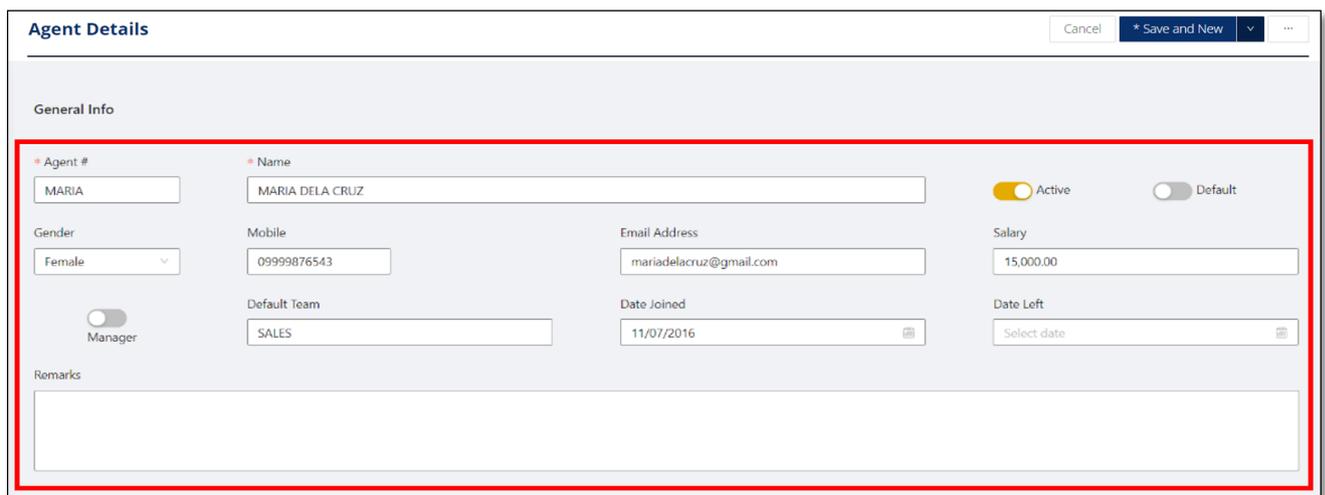
Search... Reload

Code	Name	Gender	Mobile	Default
CINDY	CINDY	Female	9988 5769	
PETER	PETER	Male	9833 3288	
SAM	SAM LEE CHIN HONG	Male	9657 8900	
YEOH	YEOH AH HENG	Male	09193319299	

< 1 > 10 / page

3. Supply the fields with data;

- Agent #: This is a compulsory field with maximum of 20 alphanumeric length
- Name: This is a compulsory field which you need to indicate the name of the Agent
- Active: This is a function to set if an Area is still used. If an Area will not be used anymore, disable the toggle to make as Inactive.
- Default
- Gender
- Mobile
- Email Address
- Salary
- Default Team
- Date Joined
- Date Left
- Remarks



Agent Details Cancel * Save and New ...

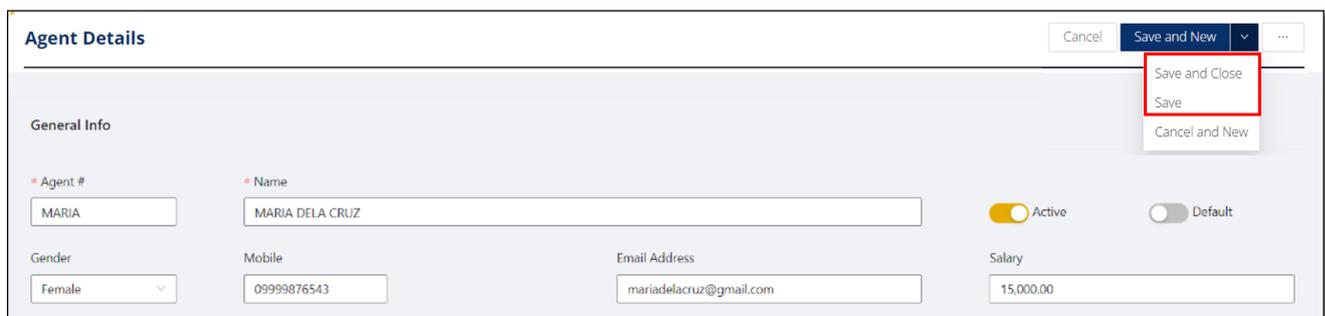
General Info

* Agent # * Name Active Default

Gender Mobile Email Address Salary

Manager Default Team Date Joined Date Left

Remarks

4. Once done, click *Save* or *Save and Close*.

Agent Details Cancel Save and New ...

General Info

* Agent # * Name Active Default

Gender Mobile Email Address Salary

Manager Default Team Date Joined Date Left

Remarks

Save and Close
Save
Cancel and New

How to Edit Agent

1. In Agent List View, **Select** the Agent then **click Code** to edit.

Code	Name	Gender	Mobile	Default	Action
CINDY	CINDY	Female	9988 5769		Delete
MARIA	MARIA DELA CRUZ	Male	09999876543		Delete
PETER	PETER	Male	9833 3288		Delete
SAM	SAM LEE CHIN HONG	Male	9657 8900		Delete
YEOH	YEOH AH HENG	Male	09193319299		Delete

2. Then Supply the Fields that needs to be edited. Once done, click **Save** or **Save and Close**.

Agent Details					
<div style="text-align: right;"> Cancel Save and New ... </div>					
General Info					
* Agent #	* Name			<input checked="" type="checkbox"/> Active	<input type="checkbox"/> Default
MARIA	MARIA DELA CRUZ				
Gender	Mobile	Email Address	Salary		
Female	09354876543	mariadelacruz@gmail.com	15,000.00		
<input type="checkbox"/> Manager	Default Team	Date Joined	Date Left		
	SALES	11/07/2016	Select date		
Remarks					
<div style="border: 1px solid #ccc; height: 30px;"></div>					

How to Delete Agent

1. In Agent List View, **Select** the Agent then **click Delete**

Code	Name	Gender	Mobile	Default	Action
CINDY	CINDY	Female	9988 5769		Delete
MARIA	MARIA DELA CRUZ	Female	09354876543		Delete
PETER	PETER	Male	9833 3288		Delete
SAM	SAM LEE CHIN HONG	Male	9657 8900		Delete
YEOH	YEOH AH HENG	Male	09193319299		Delete

2. When the confirmation message prompted, click **Yes**

Code	Name	Gender	Mobile	Default	Action
CINDY	CINDY	Female	9988 5769		Delete
MARIA	MARIA DELA CRUZ	Female	09354876543		Delete
PETER	PETER	Male	9833 3288		Delete
SAM	SAM LEE CHIN HONG	Male	9657 8900		Delete
YEOH	YEOH AH HENG	Male	09193319299		Delete

Are you sure you want to delete this record?

No Yes

Application:

Agents can now be used for customer maintenance.

Customer Details		Cancel		* Save and New		...	
* Customer Name	ADVANCE TRADING CORPORATION	* Terms	30 DAYS	Category	CORPORATE		
* Control Acc.	103-0000	* Customer Code	101-A001	* Currency	PHP	Agent	MARIA
TIN No.	780-090-909	Business Nature	TRADING	Website	www.advance.com	Area	MKTI
BIR Info	ADVANCE TRADING CORP.	Deferred VAT					



For further concerns regarding this matter, please contact support to assist you or create ticket thru this link <https://support.qne.com.ph>