How to Create, Edit and Delete Agent.

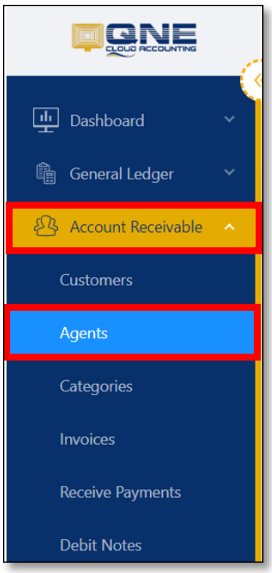
Overview:

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.

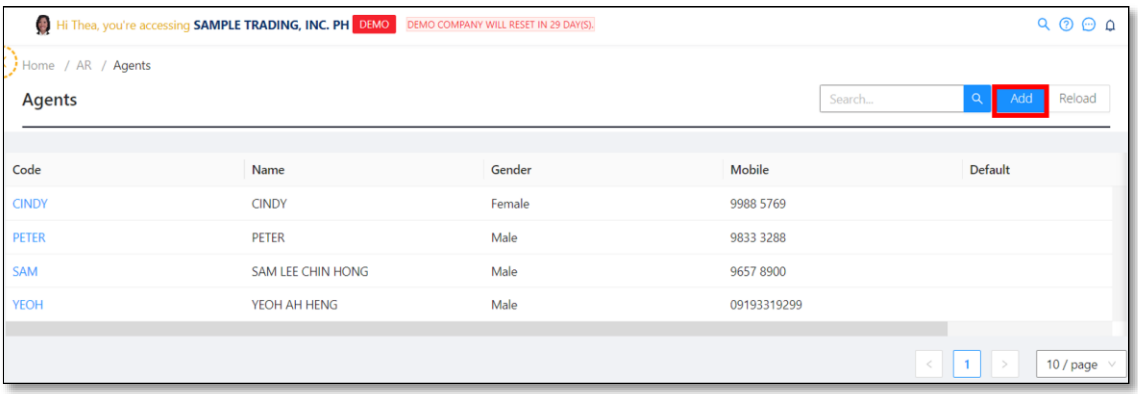
Procedure:

How to Create Agent

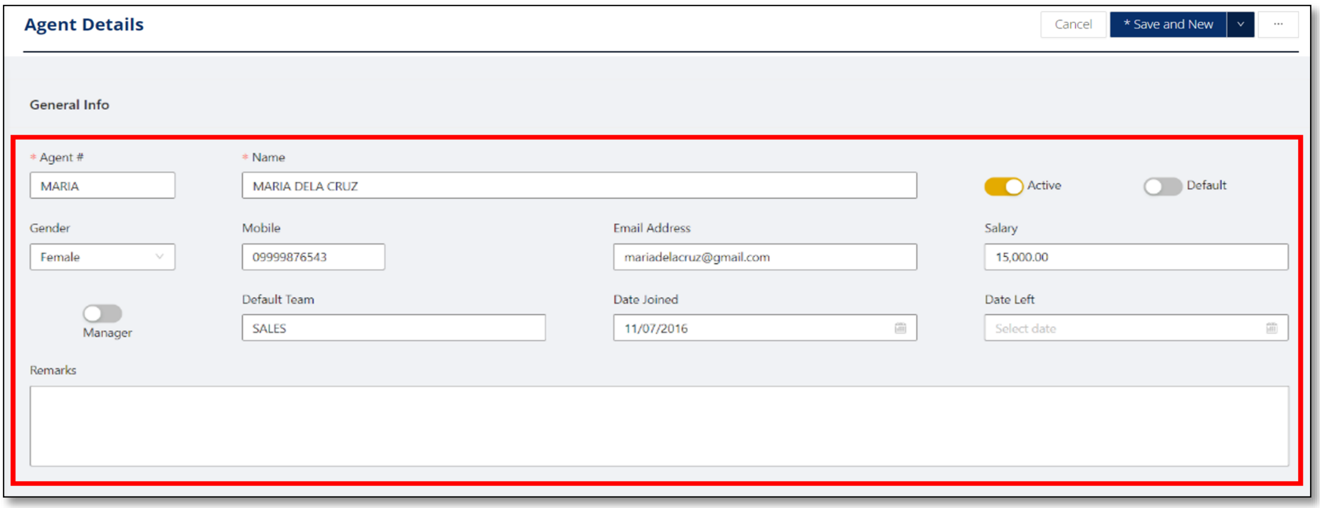
1. Go to the **Navigation pane** > **Account Receivable > Agents**



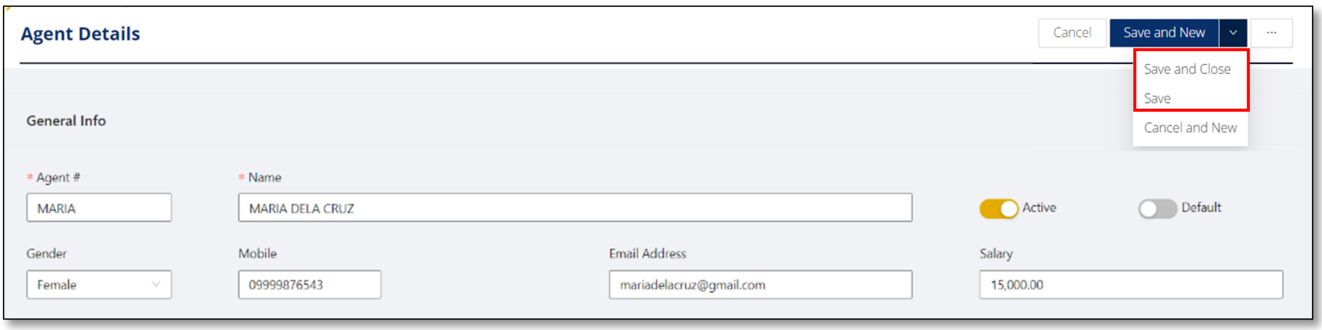
2. In the **Agent List View**, click ***Add***



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

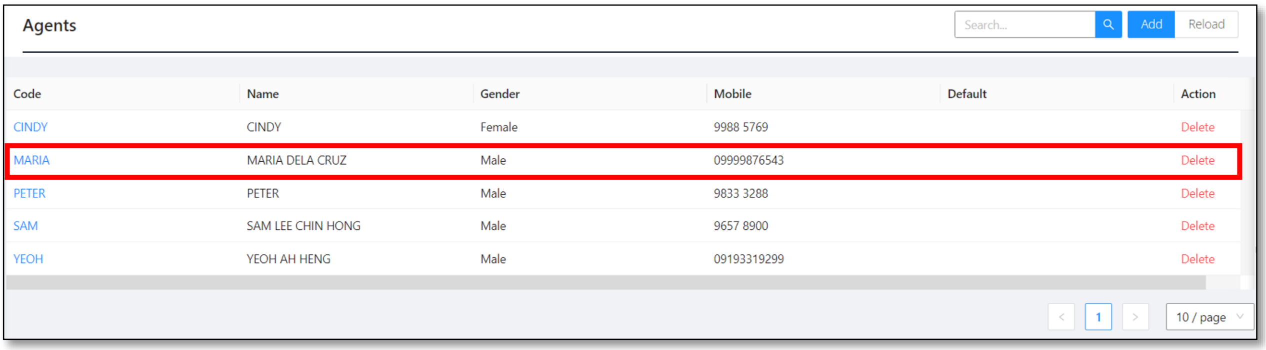


4. Once done, click ***Save*** or ***Save and Close.***

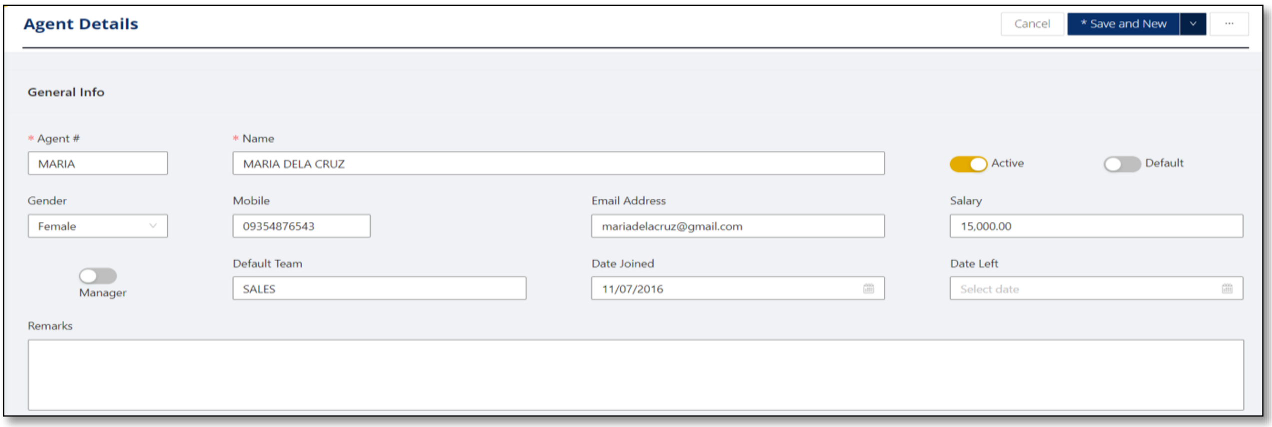


How to Edit Agent

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

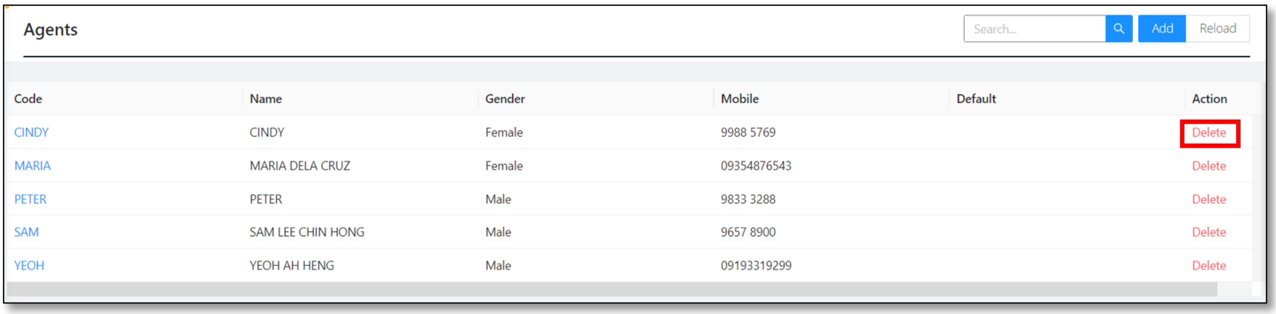


2. Then Supply the Fields that needs to be edited. Once done, click ***Save*** or ***Save and Close.***

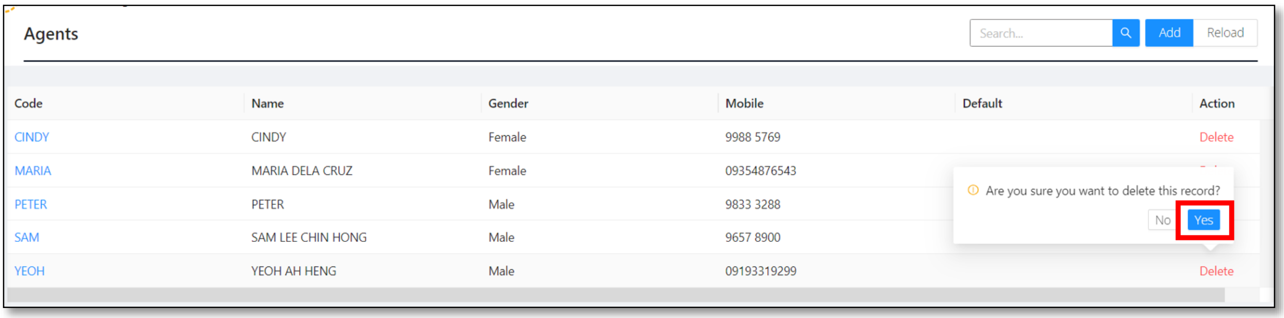


How to Delete Agent

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

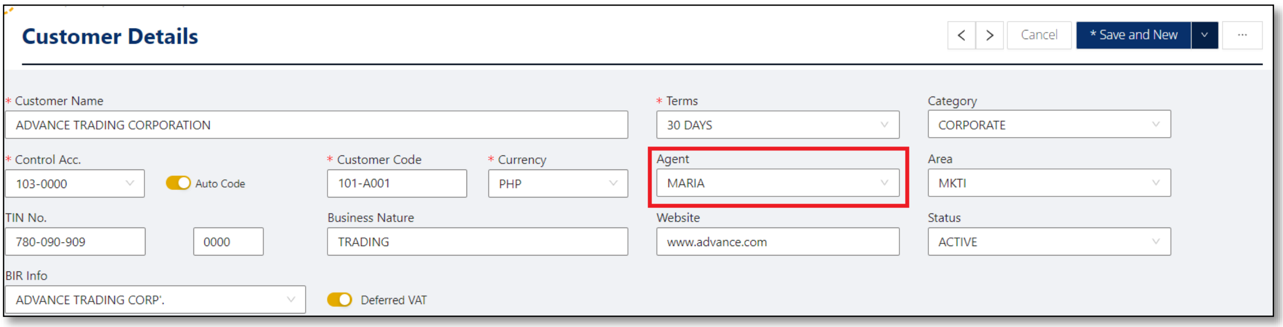


2. When the confirmation message prompted, click *Yes*



Application:

Agents can now be used for customer maintenance.



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