



How to Create, Edit and Delete Agent

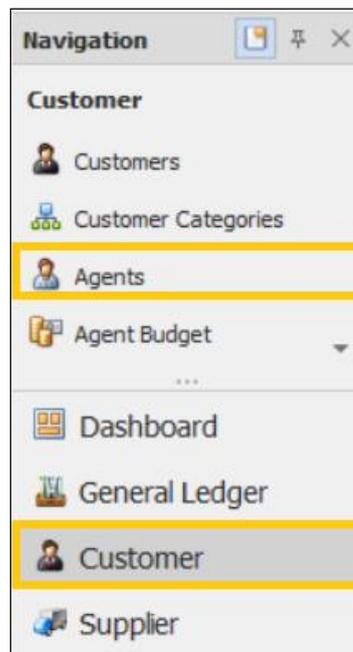
Overview:

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.

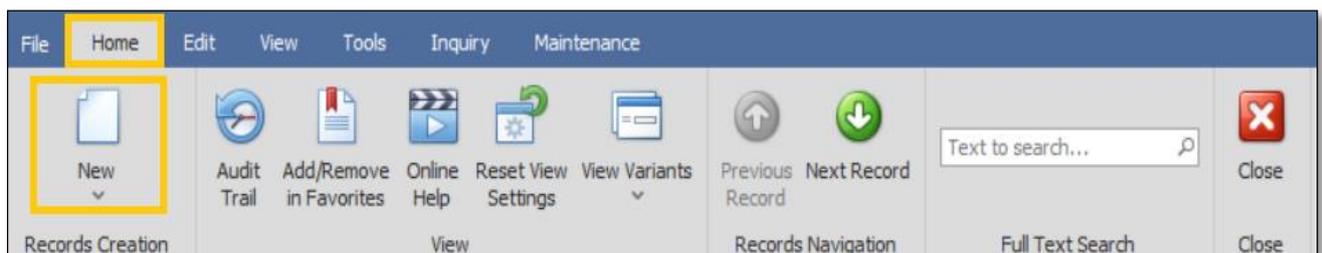
Procedure:

How to Create Agent

1. Go to the **Navigation pane > Customer > Agents**

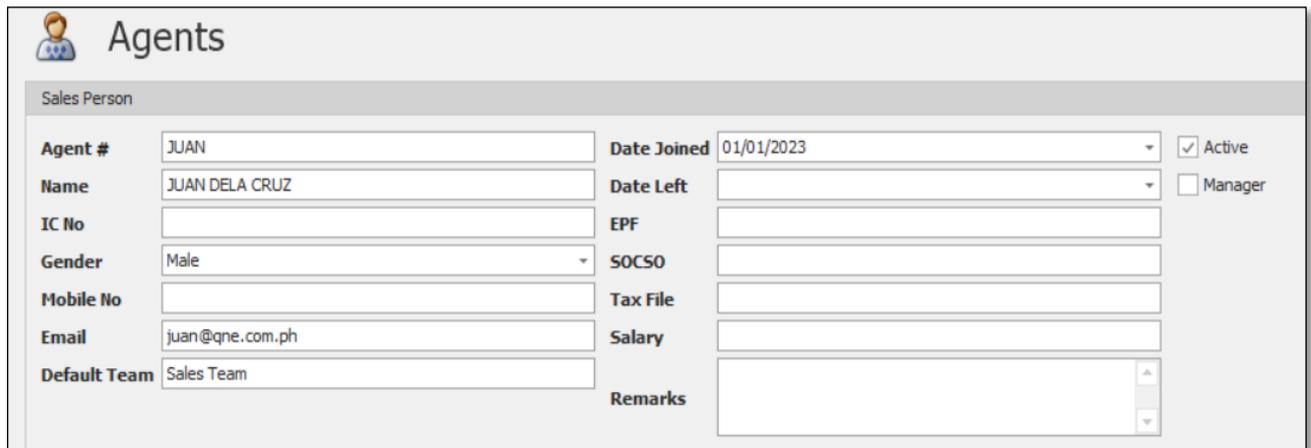


2. In Agents list view, click **New**

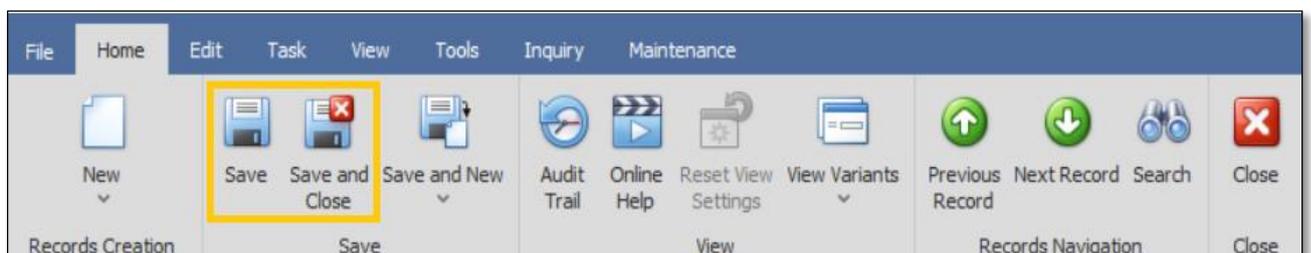


3. Supply the fields with data;

- 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
- Date Joined and Left (*Optional*)
- 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.
- IC No. and EPF (*Optional*)
- Gender (*Optional*)
- SOCSO (*Optional*)
- Mobile (*Optional*)
- Tax File (*Optional*)
- Email Address (*Optional*)
- Salary (*Optional*)
- Default Team (*Optional*)
- Default Team (*Optional*)
- Remarks (*Optional*)

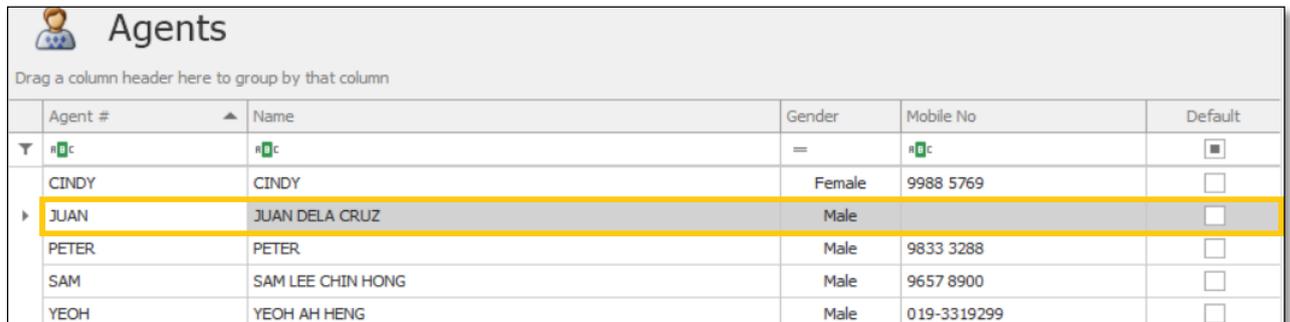


4. Once done, click **Save** or **Save and Close**.



How to Edit Agent

1. In Agent list view, **double click** the Agent



Agent #	Name	Gender	Mobile No	Default
CINDY	CINDY	Female	9988 5769	<input type="checkbox"/>
JUAN	JUAN DELA CRUZ	Male		<input type="checkbox"/>
PETER	PETER	Male	9833 3288	<input type="checkbox"/>
SAM	SAM LEE CHIN HONG	Male	9657 8900	<input type="checkbox"/>
YEOH	YEOH AH HENG	Male	019-3319299	<input type="checkbox"/>

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



Agents

Sales Person

Agent # Date Joined Active

Name Date Left Manager

IC No

Gender EPF

Mobile No SOCSO

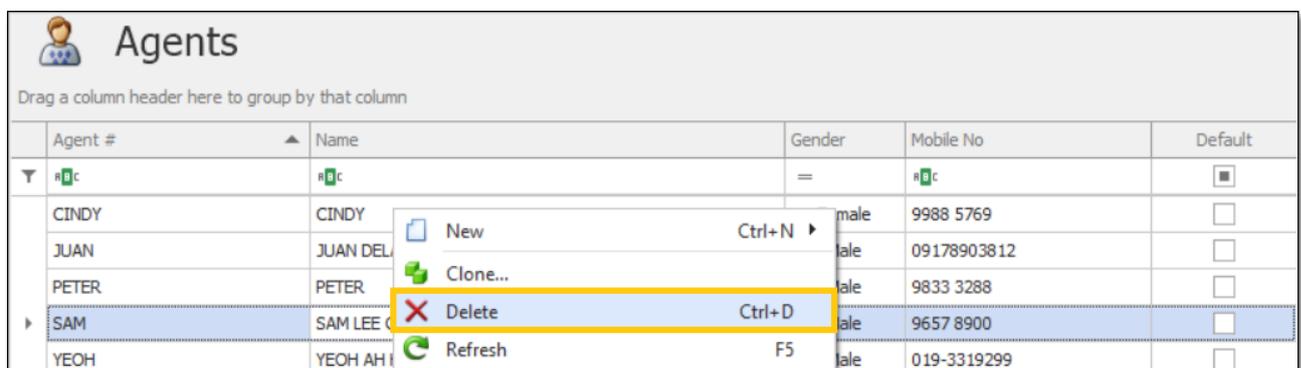
Email Tax File

Default Team Salary

Remarks

How to Delete Agent

1. In Agent List View, **right click** Agent then click **Delete**



Agent #	Name	Gender	Mobile No	Default
CINDY	CINDY	Female	9988 5769	<input type="checkbox"/>
JUAN	JUAN DELA CRUZ	Male	09178903812	<input type="checkbox"/>
PETER	PETER	Male	9833 3288	<input type="checkbox"/>
SAM	SAM LEE CHIN HONG	Male	9657 8900	<input type="checkbox"/>
YEOH	YEOH AH HENG	Male	019-3319299	<input type="checkbox"/>

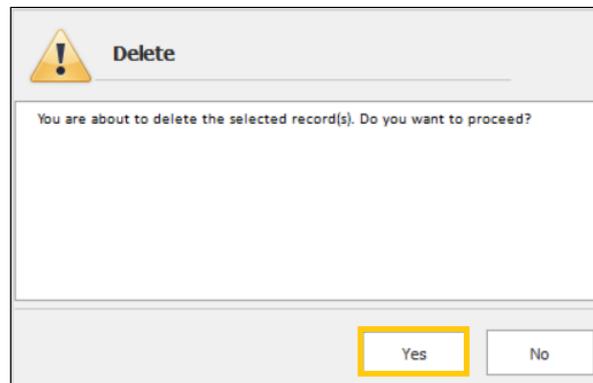
New Ctrl+N

Clone...

Delete Ctrl+D

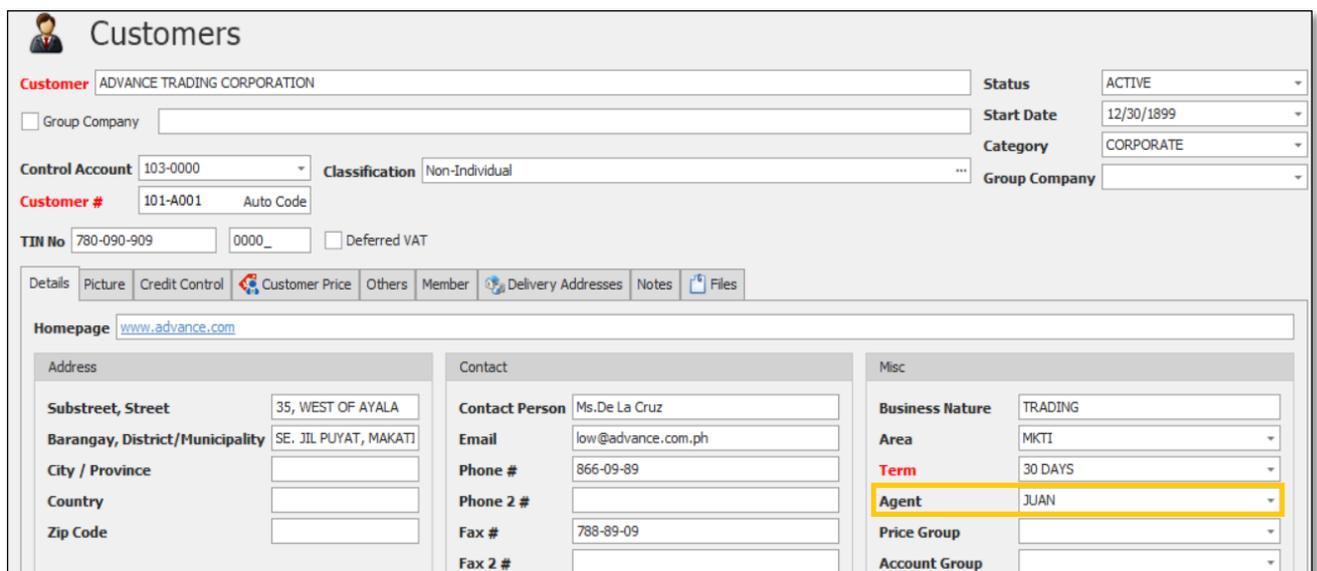
Refresh F5

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



Application:

Agent is now available for selection in Customer Maintenance and AR-Related Transaction Forms.



Customers

Customer ADVANCE TRADING CORPORATION **Status** ACTIVE

Group Company **Start Date** 12/30/1899

Control Account 103-0000 **Classification** Non-Individual **Category** CORPORATE

Customer # 101-A001 Auto Code **Group Company**

TIN No 780-090-909 0000_ Deferred VAT

Details Picture Credit Control Customer Price Others Member Delivery Addresses Notes Files

Homepage www.advance.com

Address	Contact	Misc
Substreet, Street 35, WEST OF AYALA	Contact Person Ms.De La Cruz	Business Nature TRADING
Barangay, District/Municipality SE. JIL PUYAT, MAKATI	Email low@advance.com.ph	Area MKTI
City / Province	Phone # 866-09-89	Term 30 DAYS
Country	Phone 2 #	Agent JUAN
Zip Code	Fax # 788-89-09	Price Group
	Fax 2 #	Account Group



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