



How to Create, Edit and Delete Agent.

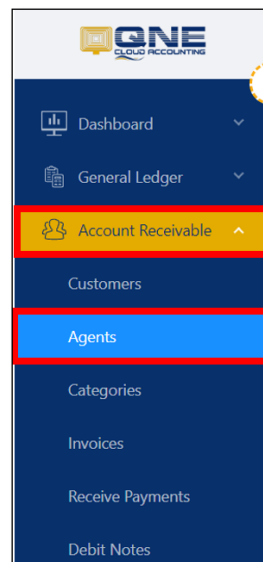
Overview:

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.

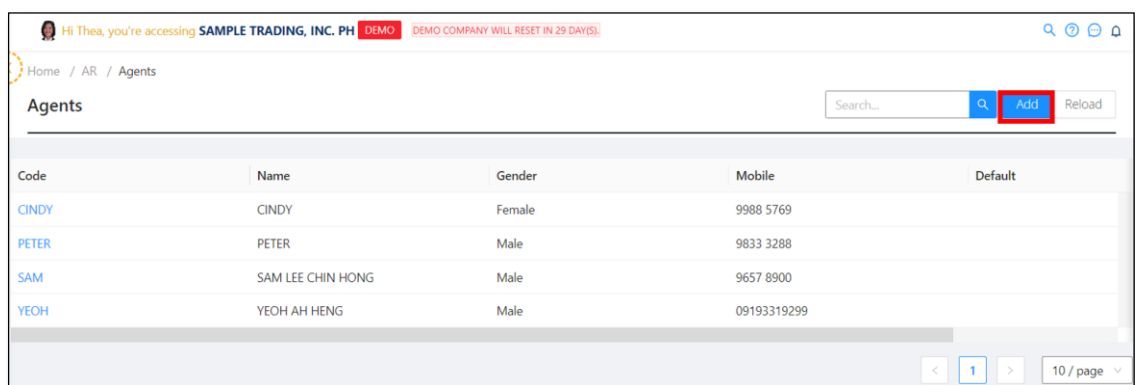
Procedure:

How to Create Agent

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

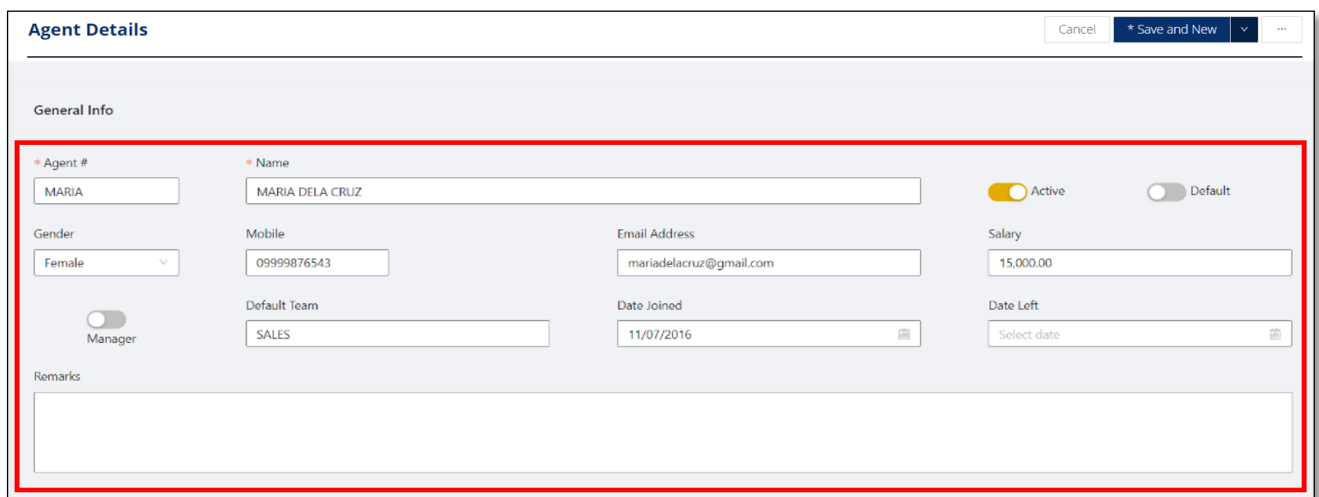


2. In the **Agent List View**, click **Add**

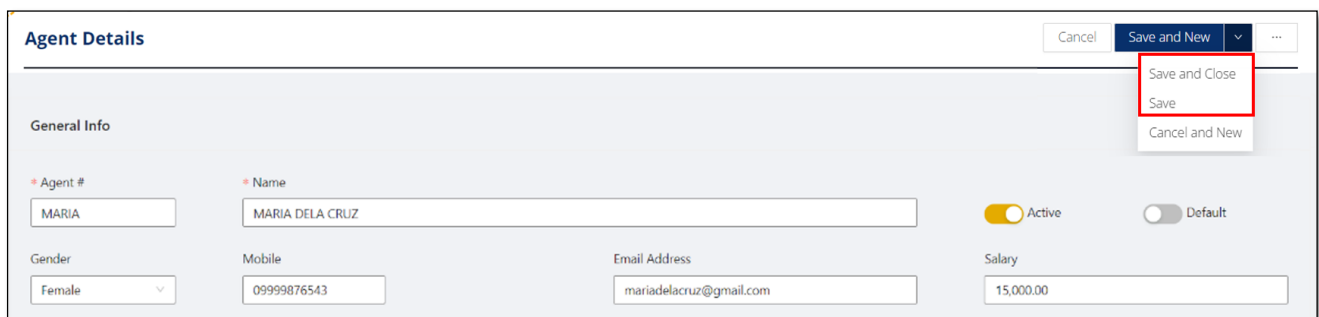


3. Supply the fields with data;

- 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



The screenshot shows the 'Agent Details' form. A red rectangle highlights the input fields for Agent #, Name, Gender, Mobile, Email Address, Salary, Default Team, Date Joined, Date Left, and the Remarks text area. The form includes a 'Manager' toggle switch and a 'Remarks' text area at the bottom. The top right corner has buttons for 'Cancel', 'Save and New', and a dropdown menu.

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

This screenshot shows the same 'Agent Details' form, but with the dropdown menu open. The menu options are 'Save and Close', 'Save', and 'Cancel and New'. The 'Save and Close' option is highlighted with a red rectangle. The form data is the same as in the previous screenshot.

How to Edit Agent

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

Agents					
Search...				Q	Add Reload
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**.

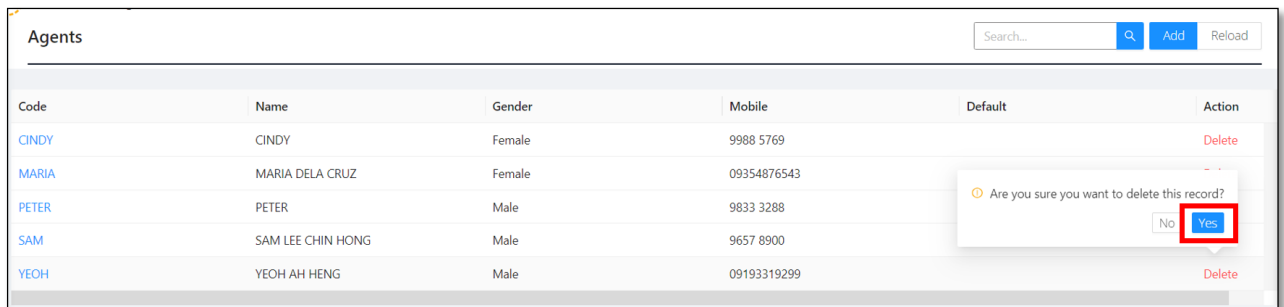
Agent Details									
Cancel				* Save and New	...				
General Info									
* Agent #	* Name								
MARIA	MARIA DELA CRUZ				<input checked="" type="checkbox"/> Active <input type="checkbox"/> Default				
Gender	Mobile	Email Address		Salary					
Female	09354876543	mariadelacruz@gmail.com		15,000.00					
<input type="checkbox"/> Manager	Default Team	Date Joined		Date Left					
	SALES	11/07/2016		Select date					
Remarks									

How to Delete Agent

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

Agents					
Search...				Q	Add Reload
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**

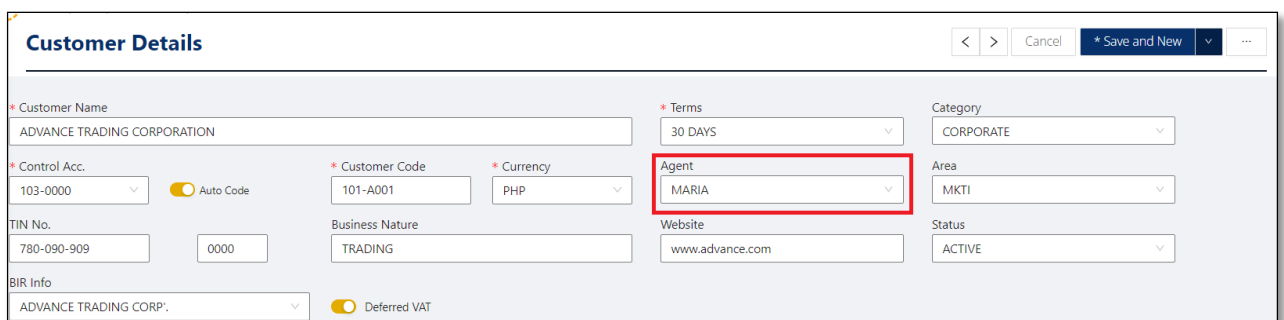


The screenshot shows a table titled "Agents" with columns: Code, Name, Gender, Mobile, Default, and Action. The table contains five rows of agent data. A confirmation dialog box is displayed over the table, asking "Are you sure you want to delete this record?". The dialog has two buttons: "No" and "Yes". The "Yes" button is highlighted with a red box.

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

Application:

Agents can now be used for customer maintenance.



The screenshot shows the "Customer Details" form. The form contains various fields for customer information. The "Agent" dropdown menu is highlighted with a red box, showing "MARIA" as the selected agent.

* Customer Name		* Terms	Category
ADVANCE TRADING CORPORATION		30 DAYS	CORPORATE
* Control Acc.	* Customer Code	* Currency	Agent
103-0000	101-A001	PHP	MARIA
TIN No.	Business Nature	Website	Area
780-090-909	TRADING	www.advance.com	MKT1
BIR Info	Status		ACTIVE
ADVANCE TRADING CORP.			



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