



How to Create, Edit and Delete Agent

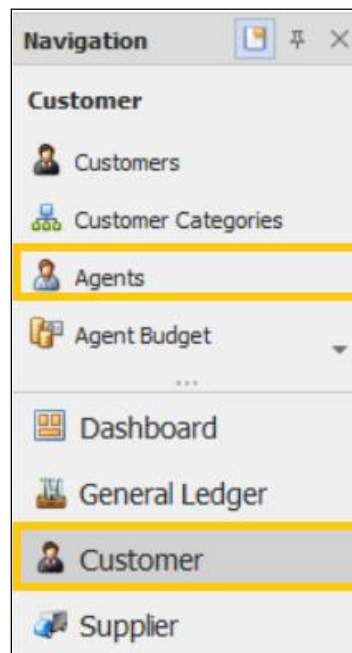
Overview:

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.

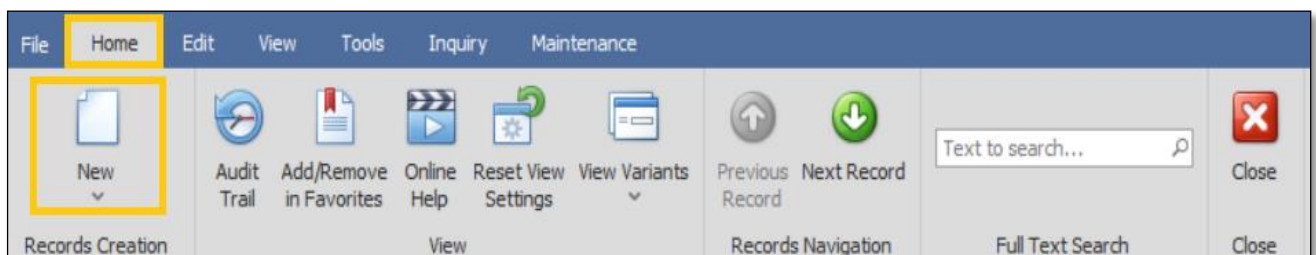
Procedure:

How to Create Agent

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

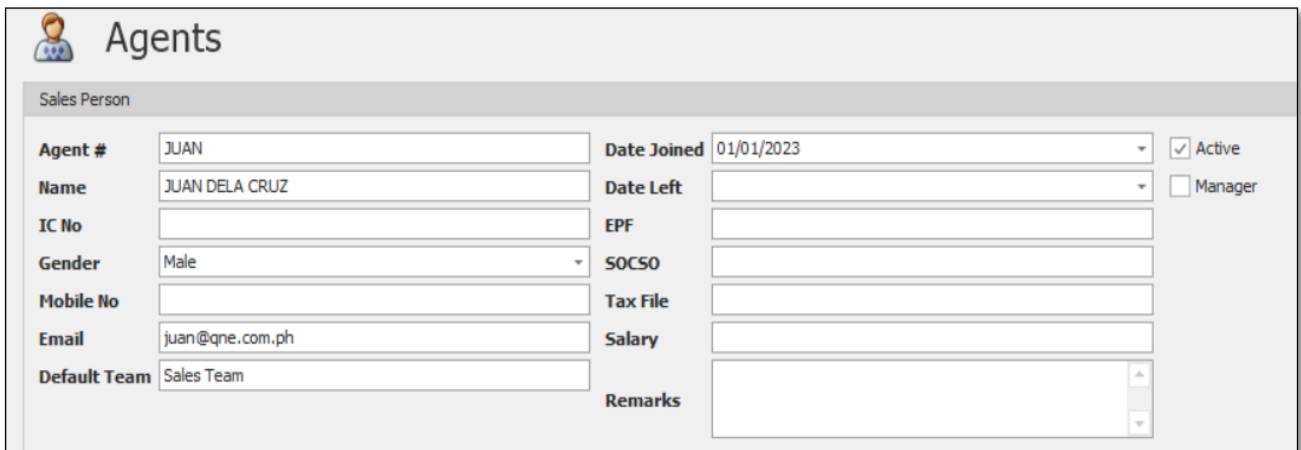


2. In Agents list view, click **New**

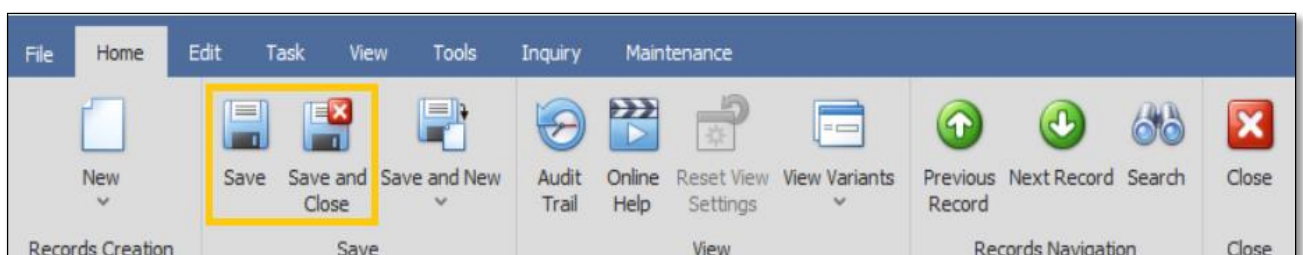


3. Supply the fields with data;

- 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*)

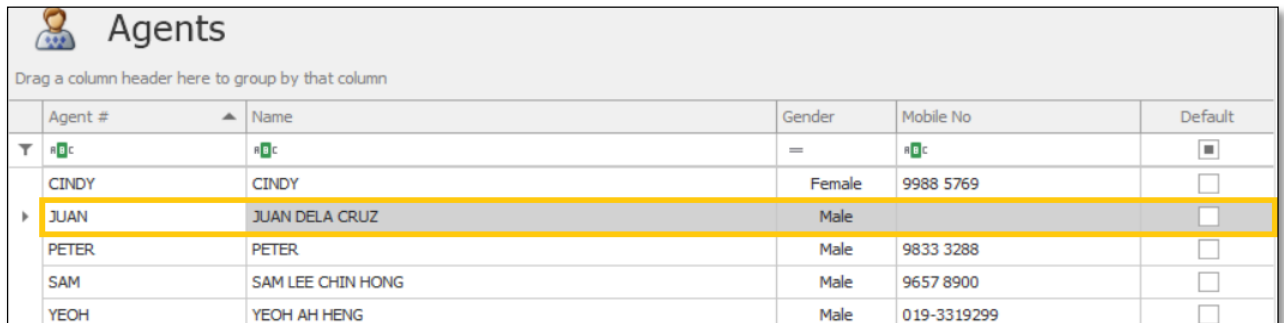


4. Once done, click **Save** or **Save and Close**.



How to Edit Agent

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

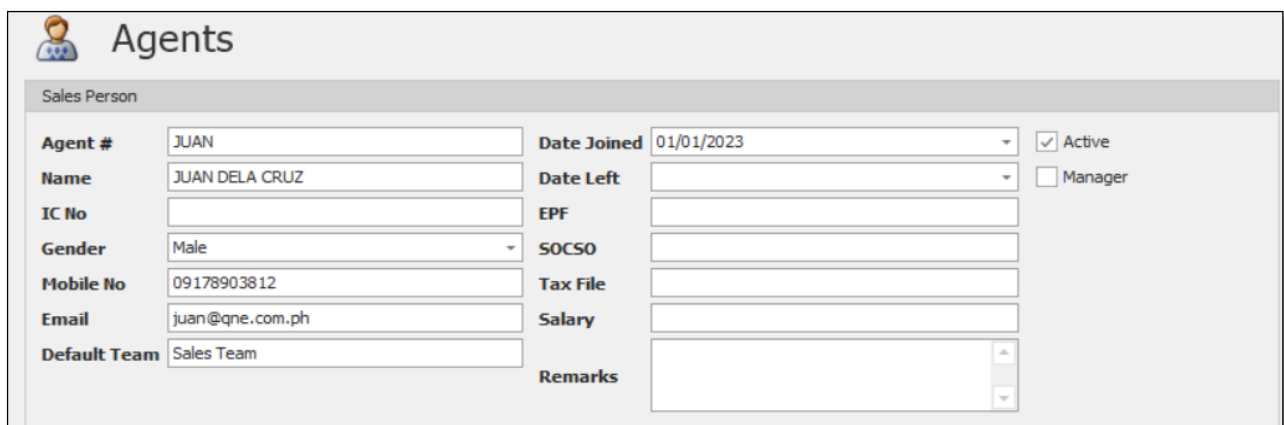


Agents

Drag a column header here to group by that column

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**.



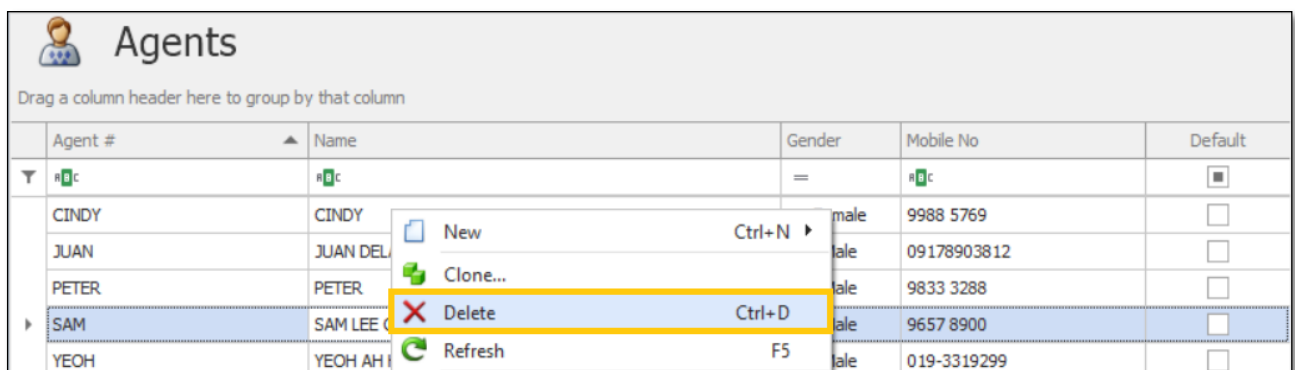
Agents

Sales Person

Agent #	JUAN	Date Joined	01/01/2023	<input checked="" type="checkbox"/> Active
Name	JUAN DELA CRUZ	Date Left		<input type="checkbox"/> Manager
IC No		EPF		
Gender	Male	SOCSSO		
Mobile No	09178903812	Tax File		
Email	juan@qne.com.ph	Salary		
Default Team	Sales Team	Remarks		

How to Delete Agent

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



Agents

Drag a column header here to group by that column

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"/>

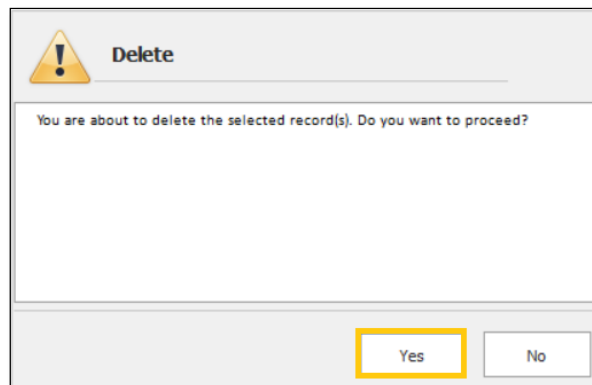
New Ctrl+N

Clone...

Delete Ctrl+D

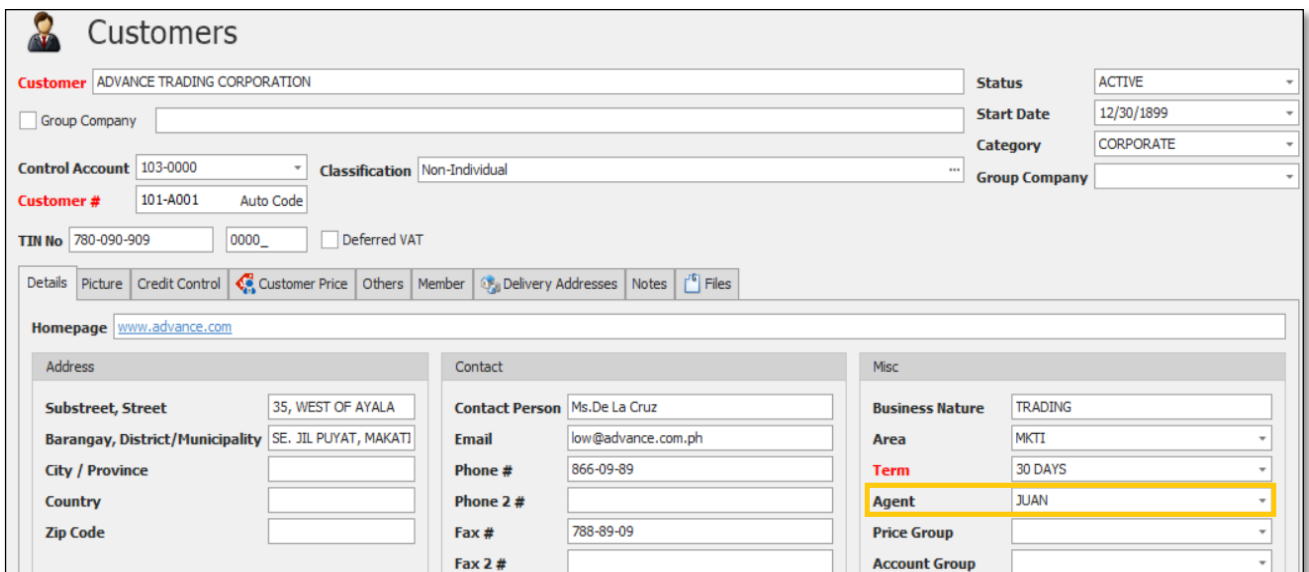
Refresh F5

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



Application:

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


 A screenshot of the "Customers" form in a software application. The form contains various fields for customer information. The "Agent" field in the "Misc" section is highlighted with a yellow border.

Customers	
Customer	ADVANCE TRADING CORPORATION
<input type="checkbox"/> Group Company	
Control Account	103-0000
Classification	Non-Individual
Customer #	101-A001 Auto Code
TIN No	780-090-909 0000_ <input type="checkbox"/> Deferred VAT
Status	ACTIVE
Start Date	12/30/1899
Category	CORPORATE
Group Company	
Details Picture Credit Control Customer Price Others Member Delivery Addresses Notes Files	
Homepage www.advance.com	
Address Substreet, Street 35, WEST OF AYALA Barangay, District/Municipality SE. JIL PUYAT, MAKATI City / Province Country Zip Code	Contact Contact Person Ms.De La Cruz Email low@advance.com.ph Phone # 866-09-89 Phone 2 # Fax # 788-89-09 Fax 2 #
Misc Business Nature TRADING Area MKTI Term 30 DAYS Agent JUAN Price Group 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>