

Salesperson

This screen is used to enter and maintain the salesperson and driver information.

Entity -

NewSaveSearchRefreshDeleteUndoAdditionalClose

EntityGeneralSalespersonComments (0)Attachments (0)MessagesCustomAudit Log (0)

Type:Driver

Date Hired:

Birth Date:

Gender:

Territory

Marital Status:

Spouse:

Active:☒

Employment History

Terminated:

Reason:

Commission Details

Commission:NonePercent:0.00%

Signature

Signature File:

Dispatch

Notification:

Message:

Edited

Page1 of 1

Field Description

Type - Select from the combo box list the salesperson type. The selections are Sales Representative and Driver. When Driver is selected, the Dispatch panel will be visible.

Date Hired - Enter the date the salesperson was hired.

Birth Date - Enter the birth date of the salesperson.

Gender - Select the salesperson's gender. The selections are Male and Female.

Territory - Select the territory that the salesperson will be assigned to. The combo box list will retrieved from the Territory records. If the territory you are looking for is not in the list, you will have to add it to [Territory](#) screen.

Marital Status - Select from the predefined list of statuses. The combo box selections are Single, Married, Widowed, Divorced, and Others.

Spouse - If applicable, enter the name of the salesperson's spouse.

Active - This check box is checked by default. Check this box to indicate that the salesperson is still active.

Terminated - If applicable, enter the date the salesperson has been terminated.

Reason - If the salesperson is already terminated, enter the reason for termination.

Commission - Select the commission of the salesperson. The combo box options are Subtotal, Gross Profit, Gross Sale, and None. Field will show None by default.

Percent - Enter the commission in terms of percent.

Signature File - Use this field to assign a digital signature file to the salesperson. Select from the list the appropriate file. The list will show the attached files on Attachments tab.

Notification - Select the type of notification the driver will get. The options are Text, Email, and Both. Note that this field is displayed only when Type is set to Driver.

Message - Enter the message notification that will be sent to the driver. Note that this field is displayed only when Type is set to Driver.

Pages

- [How to Add a Sales Representative type Salesperson](#)
- [How to Add a Driver type Salesperson](#)
- [How to Open Salesperson record](#)
- [How to Activate/Deactivate a Salesperson](#)
- [Territory](#)
 - [How to Add a Territory](#)

Entity - Salesperson

New Save Search Refresh Delete Undo Additional Close

Entity Salesperson Comments (0) Attachments (0) Custom Audit Log (0)

Type: Driver

Date Hired:

Birth Date:

Gender:

Territory:

Marital Status:

Spouse:

Active: ☒

Employment History

Terminated:

Reason:

Commission Details

Commission: None Percent: 0.00%

Dispatch

Notification:

Message:

Page 1 of 1

Field Description

Type - Select from the combo box list the salesperson type. The selections are Sales Representative and Driver. When Driver is selected, the Dispatch panel will be visible.

Date Hired - Enter the date the salesperson was hired.

Birth Date - Enter the birth date of the salesperson.

Gender - Select the salesperson's gender. The selections are Male and Female.

Territory - Select the territory that the salesperson will be assigned to. The combo box list will be retrieved from the Territory records. If the territory you are looking for is not in the list, you will have to add it to [Territory](#) screen.

Marital Status - Select from the predefined list of statuses. The combo box selections are Single, Married, Widowed, Divorced, and Others.

Spouse - If applicable, enter the name of the salesperson's spouse.

Active - This check box is checked by default. Check this box to indicate that the salesperson is still active.

Terminated - If applicable, enter the date the salesperson has been terminated.

Reason - If the salesperson is already terminated, enter the reason for termination.

Commission - Select the commission of the salesperson. The combo box options are Subtotal, Gross Profit, Gross Sale, and None. Field will show None by default.

Percent - Enter the commission in terms of percent.

Notification - Select the type of notification the driver will get. The options are Text, Email, and Both. Note that this field is displayed only when Type is set to Driver.

Message - Enter the message notification that will be sent to the driver. Note that this field is displayed only when Type is set to Driver.

This screen is used to enter and maintain the salesperson and driver information.

The screenshot shows a software application window titled "Entity". It has a menu bar with "New", "Save", "Search", "Refresh", "Delete", "Undo", "Additional", and "Close". Below the menu bar are tabs: "Entity", "Salesperson", "Notes", "Attachments", "Custom", and "Audit Log". The "Salesperson" tab is active. The form contains the following fields:

- Type: A dropdown menu with "Driver" selected.
- Date Hired: A text field with a calendar icon.
- Birth Date: A text field with a calendar icon.
- Gender: A dropdown menu.
- Territory: A text field with a search icon and a dropdown arrow.
- Marital Status: A dropdown menu.
- Spouse: A text field.
- Active: A checkbox that is checked.
- Employment History section:
 - Terminated: A text field with a calendar icon.
 - Reason: A text field.
- Commission Details section:
 - Commission: A dropdown menu with "None" selected.
 - Percent: A text field with "0.00%" entered.
- Dispatch section:
 - Notification: A dropdown menu.
 - Message: A large text area.

The bottom status bar shows "Edited" and a page indicator "Page 1 of 1".

Field Description

- Same fields above

This screen is used to enter and maintain the salesperson and driver information.

Entity -

New Save Search Refresh Undo Additional Close

Entity Salesperson Notes Attachments

Date Hired:

Birth Date:

Gender:

Territory:

Marital Status:

Spouse:

Active: ☒

Employment History

Terminated:

Reason:

Commission Details

Commission: Percent:

Dispatch

Notification:

Message:

Ready Page 1 of 1

Field Description

Date Hired - Enter the date the salesperson was hired.

Birth Date - Enter the birth date of the salesperson.

Gender - Select the salesperson's gender. The selections are Male and Female.

Territory - Select the territory that the salesperson will be assigned to. The combo box list will be retrieved from the territory records. Refer also to [Territory](#).

Marital Status - Select from the predefined list of statuses. The combo box selections are Single, Married, Widowed, Divorce, and Others.

Spouse - If applicable, enter the name of the salesperson's spouse.

Active - This check box is checked by default. Check this box to indicate that the salesperson is still active.

Terminated - If applicable, enter the date the salesperson has been terminated.

Reason - If the salesperson is already terminated, enter the reason for termination.

Commission - Select the commission of the salesperson. The combo box options are Subtotal, Gross Profit, Gross Sale, and None.

Percent - Enter the commission in terms of percent.

Dispatch Notification - Select the type of notification the driver will get. The options are Text, Email, and Both.

Text/Message - Enter the message notification that will be sent to the driver.

This screen is used to enter and maintain the salesperson and driver information.

Field Description

Salesperson - Enter a unique identifier you wish to create. This is a required field which allows a maximum of 3 characters only.

Name - Enter the full name of the salesperson.

Type - Select from the combo box list the salesperson type. The selections are Sales Representative and Driver. When Driver is selected, the Dispatch tab will be visible.

Title - Enter the title of the salesperson in the company.

Phone - Enter the primary phone number of the salesperson.

Email - Enter the primary email address of the salesperson. Click the [Email Sender](#) button to launch the default email client.

Address - Enter the primary Address of the salesperson. Click the [Address Mapper](#) to launch the Google Maps to a new tab of the default browser.

Zip/Postal - Select the primary zip code of the salesperson from the combo box list.

City - This field is auto-populated when a zip code is selected. However, you can edit this if necessary.

State/Province - This field is auto-populated when a zip code is selected. However, you can edit this if necessary.

Country - This field is auto-populated when a zip code is selected. However, you can edit this if necessary.

Mobile - Enter the mobile number of the salesperson.

Fax - Enter the fax number of the salesperson.

Alt Phone - Enter the secondary phone number and if applicable, its extension of the salesperson.

Alt Email - Enter the secondary email address of the salesperson.

Internal Notes - Enter any additional notes or info for the salesperson.

Date Hired - Enter the date the salesperson was hired.

Active - Check the button to activate the salesperson. Otherwise, deselect it. Inactive salespersons are not selectable on salesperson related combo box list.

Birth Date - Enter the birth date of the salesperson.

Gender - Select the salesperson's gender. The selections are Male and Female.

Territory - Select the territory that the salesperson will be assigned to. The combo box list will be retrieved from the territory records. Refer also to [Territory](#).

Marital Status - Select from the predefined list of statuses. The combo box selections are Single, Married, Widowed, Divorce, and Others.

Spouse - If applicable, enter the name of the salesperson's spouse.

Terminated - If applicable, enter the date the salesperson has been terminated.

Reason - If the salesperson is already terminated, enter the reason for termination.

Commission - Select the commission of the salesperson. The combo box options are Subtotal, Gross Profit, Gross Sale, and None.

Percent - Enter the commission in terms of percent.

Dispatch tab is visible only when the Type field on General tab is set to Driver.

Dispatch Notification - Select the type of notification the driver will get. The options are Text, Email, and Both.

Text/Message - Enter the message notification that will be sent to the driver.