

How to Add a Driver type Salesperson

1. Open a new Salesperson screen. There are four ways to do this. Note that the New button will open the [Create New Entity](#) screen. You can either fill out this screen, or simply close it and proceed with the succeeding steps.
 - a. Via Menu: On **Sales folder**, click the **Sales Reps menu**. When the **Salesperson Entity search grid** is displayed, click the **New button**.
 - b. Via Entity screen | New button: On Entity (Salesperson) screen, click the **New button**.
 - c. Via Entity screen | Search button: On Entity (Salesperson) screen, click the **Search button**. When the **Search Salesperson Entity** screen is displayed, click the **New button**.
 - d. Via Entity tab | Customer tab: On Entity (Customer) screen, navigate to **Customer tab | Detail tab**. Click the **Salesperson hyperlink**. If the field is blank, the link will open a new Salesperson screen, else it will open the record of the salesperson assigned to the customer.
2. Fill out the **Entity tab fields**.
 - a. Enter the **Name**, **Contact Name**, **Location Name**, and **Timezone**. These are the required details in saving the record.
 - b. You can either enter the **Entity No** or let the system generate it for you upon saving the record.
 - c. Make sure that the **Entity Type** is set to **Salesperson**.
 - d. Fill out other details on Entity tab. You can be as detailed as you see necessary. Below is a sample record.

The screenshot shows the 'Entity - Jared Smith' form with the 'Entity' tab selected. The form contains the following fields and sections:

- Entity Information:** Name (Jared Smith), Phone ((800) 24-0041), Entity No (0001005096), Contact Name (Jared Smith), Email (jared_smith@homeapp.com), Mobile (), Location Name (Fort Wayne), Origination Date (3/23/2016), Address (430 Massachusetts Ave.), Zip/Postal (46801), City (Fort Wayne), State/Province (IN), Country (United States), Timezone (UTC-08:00 Pacific Time (US & Canada)), Document Delivery (), Print 1099 (), 1099 Name (), 1099 Form (), 1099 Type (), Federal Tax ID (), W9 Signed (), Internal Notes ().
- Contact Information:** + Insert, X Remove, Types, Type, Details.
- Entity Type:** + Insert, X Remove, Entity Type, Salesperson.

3. Navigate to **Salesperson tab** and fill out the fields.
 - a. Set **Type** to **Driver**. The **Dispatch panel** will be displayed on the right side of the screen.
 - b. Enter other necessary details. Refer to [Salesperson](#) | [Field Description](#) to help you in filling out the fields.

The screenshot shows the 'Entity - Jared Smith' form with the 'Salesperson' tab selected. The form contains the following fields and sections:

- General Information:** Type (Driver), Date Hired (6/14/2004), Birth Date (1/2/1978), Gender (Male), Territory (OH), Marital Status (Single), Spouse (), Active (checked).
- Employment History:** Terminated (), Reason ().
- Commission Details:** Commission (Subtotal), Percent (3.50%).
- Signature:** Signature File (jaredsmithsignature.png).
- Dispatch Panel:** Notification (Email), Message (This is a sample dispatch message).

4. **Save** the record once done.

1. Open a new Salesperson screen. There are four ways to do this. Note that the New button will open the [Create New Entity](#) screen. You can either fill out this screen, or simply close it and proceed with the succeeding steps.
 - a. Via Menu: On **Sales** folder, click the **Sales Reps** menu. When the **Salesperson Entity** search grid is displayed, click the **New** button.
 - b. Via Entity screen | New button: On Entity (Salesperson) screen, click the **New** button.
 - c. Via Entity screen | Search button: On Entity (Salesperson) screen, click the **Search** button. When the **Search Salesperson Entity** screen is displayed, click the **New** button.
 - d. Via Entity tab | Customer tab: On Entity (Customer) screen, navigate to **Customer tab | Detail tab**. Click the **Salesperson** hyperlink. If the field is blank, the link will open a new Salesperson screen, else it will open the record of the salesperson assigned to the customer.
2. Fill out the **Entity** tab fields.
 - a. Enter the **Name**, **Contact Name**, **Location Name**, and **Timezone**. These are the required details in saving the record.
 - b. You can either enter the **Entity No** or let the system generate it for you upon saving the record.
 - c. Make sure that the **Entity Type** is set to **Salesperson**.
 - d. Fill out other details on Entity tab. You can be as detailed as you see necessary. Below is a sample record.

The screenshot shows the 'Entity - Jared Smith' form with the 'Entity' tab selected. The form includes the following fields and sections:

- Name:** Jared Smith
- Phone:** (800) 24-0041
- Entity No:** 0001005096
- Contact Name:** Jared Smith
- Email:** jared_smith@homeapp.com
- Mobile:** 760-987-1234
- Location Name:** Fort Wayne
- Origination Date:** 03/23/2016
- Address:** 430 Massachusetts Ave.
- Zip/Postal:** 46801
- City:** Fort Wayne
- State/Province:** IN
- Country:** United States
- Timezone:** (UTC-12:00) International Date Line West
- Print 1099:** ☐ 1099 Name:
- 1099 Form:**
- 1099 Type:**
- Federal Tax ID:**
- W9 Signed:** ☐
- Internal Notes:**
- Contact Information:**
 - ☐ Type
 - ☐ Details
- Entity Type:**
 - ☐ Entity Type
 - ☐ Salesperson
- User Portal:**
 - Portal Access: ☐
 - Portal Admin:
 - User Role:

3. Navigate to **Salesperson** tab and fill out the fields. Refer to [Salesperson | Field Description](#) to help you in filling out the fields.

The screenshot shows the 'Entity - Jared Smith' form with the 'Salesperson' tab selected. The form includes the following fields and sections:

- Type:** Sales Representative
- Date Hired:** 06/14/2004
- Birth Date:** 01/02/1978
- Gender:** Male
- Territory:**
- Marital Status:** Single
- Spouse:**
- Active:** ☒
- Employment History:**
 - Terminated:** ☐
 - Reason:**
- Commission Details:**
 - Commission:** Subtotal
 - Percent:** 3.5%

If you are to create a Driver record, set Type to **Driver**. The **Dispatch** panel will then get displayed.

Entity - Jared Smith

New Save Search Refresh Delete Undo Additional Close

Entity Salesperson Comments (0) Attachments (0) Messages Custom Audit Log (1)

Type: Driver

Date Hired: 06/14/2004

Birth Date: 01/02/1978

Gender: Male

Territory

Marital Status: Single

Spouse:

Active: ☒

Employment History

Terminated: ☐

Reason:

Commission Details

Commission: Subtotal Percent: 3.50%

Dispatch

Notification:

Message:

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4. Save the record once done.

1. Open a new Salesperson screen. There are three ways to do this. Note that the New button will open the [Create New Entity](#) screen. You can either fill out this screen, or simply close it and proceed with the succeeding steps.
 - a. On **Sales** folder, click the **Sales Reps** menu. When the **Salesperson Entity** search grid is displayed, click the **New** button.

irely IRELY ADMIN Collapse All Menus

Home Filter...

Sales

- Quotes
- Sales Orders
- Invoices
- Receive Payments
- Receive Payment Details
- Batch Posting
- Batch Printing
- Import Invoices from Origin
- Import Billable from Help D.
- Calculate Service Charge
- Service Charge Invoice
- Import Transactions from C.
- Import Logs
- Customers
- Customer Contact List
- Sales Reps**

i21 Demo Setup Company(Source)

Salesperson Entity

New Open Import Refresh Export Close

Layout Filter Records (F3) 4 records

| Entity No | Name | Phone | Address |
|------------|-----------------|------------|---------------------|
| 0001005058 | Jeff the Driver | | |
| 0001005065 | Matt Wielinski | | 4242 Flagstaff Cove |
| 0001005049 | Mike Moriarty | 8004335724 | |

- b. On Entity (Salesperson) screen, click the **New** button.

Entity - Mike Moriarty

New Save Search Refresh Delete Undo Additional Close

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

- c. On Entity (Salesperson) screen, click the **Search** button. When the **Search Salesperson Entity** screen is displayed, click the **New** button.

Entity - Mike Moriarty

New Save **Search** Refresh Delete Undo Additional + Close

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

Name: Mike Moriarty Entity No: 0001005049

Contact Name: Mike Moriarty Email: mike.moriarty@irelv.com Phone: 8004335724

Location Name: Address: Zip/Postal: State/Province: Alt Phone: Mobile:

Search Salesperson Entity

New Open Selected Refresh Export + Close

Filter Records (F3) 4 records

| Entity No | Name | Phone | Address | City | State | Zip Code |
|-------------------------------------|-----------------|------------|---------------------|------------|-------|----------|
| <input type="checkbox"/> 0001005058 | Jeff the Driver | | | | | |
| <input type="checkbox"/> 0001005065 | Matt Wielinski | | 4242 Flagstaff Cove | Fort Wayne | IN | 46815 |
| <input type="checkbox"/> 0001005049 | Mike Moriarty | 8004335724 | | | | |

2. Fill out the **Entity** tab fields.

- a. Enter the **Name**, **Contact Name**, and **Location Name**. These are the required details in saving the record.
- b. You can either enter the **Entity No** or let the system generate it for you upon saving the record.
- c. Make sure that the **Entity Type** is set to **Salesperson**.

Entity - Jared Smith

New Save Search Refresh Delete Undo Additional + Close

Entity Salesperson Comments (0) Attachments (0) Custom Audit Log (2)

Name: Jared Smith Entity No:

Contact Name: Jared Smith Email: Phone:

Location Name: Jared Smith Address: Zip/Postal: City:

Entity Type

+ Insert X Remove

☐ Entity Type

☒ **Salesperson**

- d. Fill out other details on Entity tab. You can be as detailed as you see necessary. Below is a sample record.

Entity - Jared Smith

New Save Search Refresh Delete Undo Additional + Close

Entity Salesperson Comments (0) Attachments (0) Custom Audit Log (2)

Name: Jared Smith Entity No: 0001005077

Contact Name: Jared Smith Email: jared_smith@homeapp.com Phone: (800) 24-0041

Location Name: Fort Wayne Address: 430 Massachusetts Ave. Zip/Postal: 46801 City: Fort Wayne State/Province: IN Country: United States Alt Phone: Alt Email: Mobile: 760-987-1234 Fax: Website: Timezone: Internal Notes:

Entity Type

+ Insert X Remove

☐ Entity Type

☒ Salesperson

Page 1 of 1

3. Navigate to **Salesperson** tab and fill out the fields. Refer to [Salesperson](#) | Field Description to help you in filling out the fields.

The screenshot shows the 'Entity - Jared Smith' form with the 'Salesperson' tab selected. The form contains the following fields:

- Type: Sales Representative
- Date Hired: 06/14/2004
- Birth Date: 01/02/1978
- Gender: Male
- Territory:
- Marital Status: Single
- Spouse:
- Active: ☒
- Employment History: Terminated: , Reason:
- Commission Details: Commission: Subtotal, Percent: 0.00%

If you are to create a Driver record, set Type to **Driver**. The **Dispatch** panel will then get displayed.

The screenshot shows the 'Entity - Jared Smith' form with the 'Salesperson' tab selected. The 'Type' field is set to 'Driver'. The 'Dispatch' panel is displayed on the right side of the form.

Dispatch panel fields:

- Notification:
- Message:

4. **Save** the record once done.

1. Open a new Salesperson screen. There are three ways to do this.

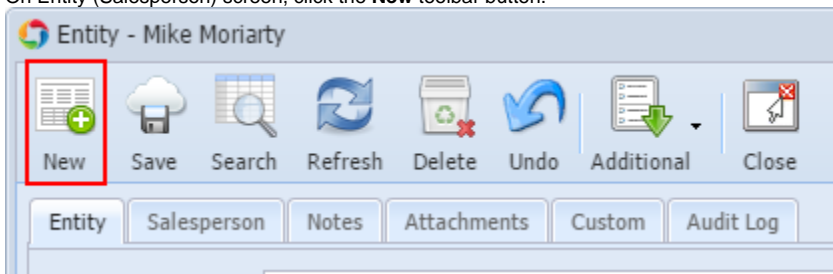
- a. On **Sales** folder, click the **Sales Reps** menu. When the **Salesperson Entity** search grid is displayed, click the **New** toolbar button.

The screenshot shows the iRely i21 - i21 Demo Setup Company(Source) interface. The 'Sales Reps' menu item is highlighted in the left sidebar. The 'Salesperson Entity' search grid is displayed on the right, showing 3 records. The 'New' button in the toolbar is highlighted with a red box.

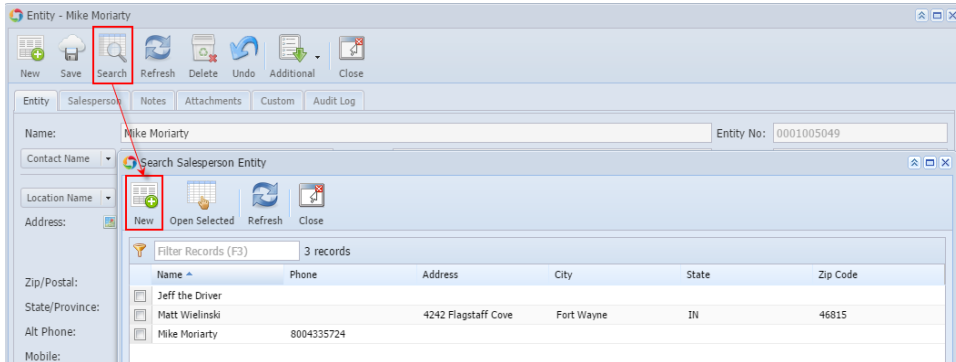
Salesperson Entity search grid:

| Name | Phone | Address |
|-----------------|------------|---------------------|
| Jeff the Driver | | |
| Matt Wielinski | | 4242 Flagstaff Cove |
| Mike Moriarty | 8004335724 | |

- b. On Entity (Salesperson) screen, click the **New** toolbar button.



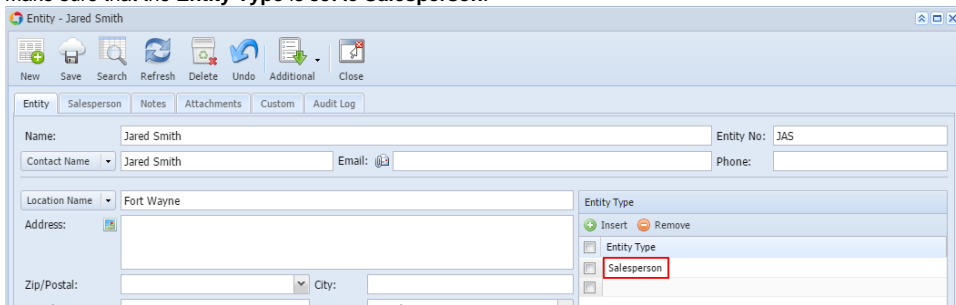
- c. On Entity (Salesperson) screen, click the **Search** toolbar button. When the **Search Salesperson Entity** screen is displayed, click the **New** toolbar button.



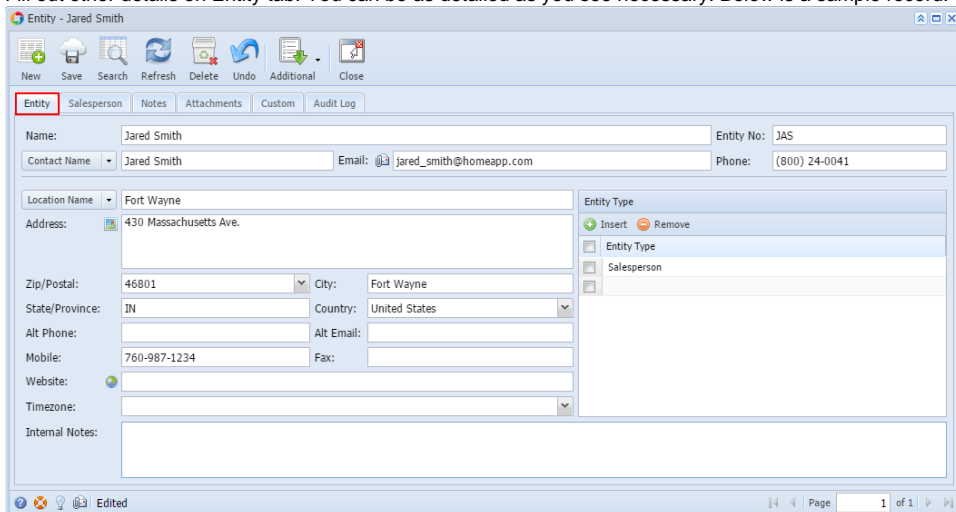
Note that the New button will open the [Create New Entity](#) screen. You can either fill out this screen or simply close it, and proceed with the following steps.

2. Fill out the **Entity** tab fields.

- a. Enter the **Name**, **Contact Name**, and **Location Name**. These are the required details in saving the record.
b. You can either enter the **Entity No** or let the system generate it for you upon saving the record.
c. Make sure that the **Entity Type** is set to **Salesperson**.



- d. Fill out other details on Entity tab. You can be as detailed as you see necessary. Below is a sample record.



3. Navigate to **Salesperson** tab and fill out the fields. Refer to [Salesperson](#) | Field Description to help you in filling out the fields.

The screenshot shows the 'Salesperson' tab of the 'Entity - Jared Smith' window. The 'Type' dropdown is set to 'Sales Representative'. Other fields include 'Date Hired' (06/14/2004), 'Birth Date' (01/02/1978), 'Gender' (Male), 'Territory', 'Marital Status' (Single), 'Spouse', 'Active' (checked), 'Employment History' (Terminated, Reason), and 'Commission Details' (Subtotal, Percent: 5.50%). The 'Dispatch' panel is not yet visible.

If you are to create a Driver record, set Type to **Driver**. The **Dispatch** panel will then get displayed.

The screenshot shows the 'Salesperson' tab with 'Type' set to 'Driver'. The 'Dispatch' panel is now visible on the right, containing 'Notification' and 'Message' fields. The 'Type' dropdown and the 'Dispatch' panel are highlighted with red boxes.

4. **Save** the record once done.

1. Open a new Salesperson screen. There are three ways to do this.

- a. On **Sales** folder, click the **Sales Reps** menu. When the **Salesperson Entity** search grid is displayed, click the **New** toolbar button.

The screenshot shows the 'Salesperson Entity' search grid. The 'Menu' on the left has 'Sales Reps' highlighted. The 'New' button in the toolbar is highlighted with a red box. The grid displays 3 records: Annabelle Chase, Inactive, and Peter Jackson.

- b. On Entity (Salesperson) screen, click the **New** toolbar button.

Entity - Annabelle Chase

Toolbar: New, Save, Search, Refresh, Undo, Additional, Close

Entity | Salesperson | Notes | Attachments

Name: Annabelle Chase

Contact Name: Annabelle Chase Email: [icon]

- c. On Entity (Salesperson) screen, click the **Search** toolbar button. When the **Search Salesperson Entity** screen is displayed, click the **New** toolbar button.

Entity - Annabelle Chase

Toolbar: New, Save, Search, Refresh, Undo, Additional, Close

Entity | Salesperson | Notes | Attachments

Name: Annabelle Chase Entity No: 0001005005

Contact Name: [dropdown]

Location Name: [dropdown]

Address: [icon]

Zip/Postal: [dropdown]

State/Province: [dropdown]

Alt Phone: [dropdown]

Mobile: [dropdown]

Search Salesperson Entity

Toolbar: New, Open Selected, Refresh, Close

Filter Records (F3) 3 records

| Name | Phone | Address | City | State | Zip Code |
|--|-------|---------|------|-------|----------|
| <input type="checkbox"/> Annabelle Chase | | | | | |
| <input type="checkbox"/> Inactive | | | | | |
| <input type="checkbox"/> Peter Jackson | | | | | |

2. Fill out the **Entity** tab fields.

- a. Enter the **Name**, **Contact Name**, and **Location Name**. These are the required details in saving the record.
- b. You can either enter the **Entity No** or let the system generate it for you upon saving the record.
- c. Make sure that the **Entity Type** is set to **Salesperson**.

Entity - Jared Smith

Toolbar: New, Save, Search, Refresh, Undo, Additional, Close

Entity | Salesperson | Notes | Attachments

Name: Jared Smith Entity No: JAS

Contact Name: Jared Smith Email: [icon] Phone: [dropdown]

Location Name: Fort Wayne

Address: [icon]

Entity Type

Insert Remove

Entity Type

Salesperson

- d. Fill out other details on Entity tab. You can be as detailed as you see necessary. Below is a sample record.

Entity - Jared Smith

Toolbar: New, Save, Search, Refresh, Undo, Additional, Close

Entity | Salesperson | Notes | Attachments

Name: Jared Smith Entity No: JAS

Contact Name: Jared Smith Email: jared_smith@homeapp.com Phone: (800) 240-0041

Location Name: Fort Wayne

Address: 430 Massachusetts Ave.

Zip/Postal: 43146 City: Orient

State/Province: OH Country: United States

Alt Phone: [dropdown]

Mobile: 760-987-1234 Fax: [dropdown]

Website: [icon]

Timezone: [dropdown]

Internal Notes: [text area]

Entity Type

Insert Remove

Entity Type

Salesperson

Edited

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3. Navigate to **Salesperson** tab and fill out the fields. Refer to [Salesperson](#) for the description of each field.

The screenshot shows the 'Salesperson' form with the following fields and values:

- Date Hired: 06/14/2004
- Birth Date: 01/02/1978
- Gender: Male
- Territory: (empty)
- Marital Status: Single
- Spouse: (empty)
- Active: ☒
- Employment History:
 - Terminated: (empty)
 - Reason: (empty)
- Commission Details:
 - Commission: Subtotal
 - Percent: 5.500000%

4. **Save** the record once done.

1. Open a new Salesperson screen. There are four ways to do this.

- a. On **Accounts Receivable > Maintenance**, double click the **Salesperson** menu. When the **Search Salesperson** screen is displayed, click the **New** toolbar button.

The screenshot shows the 'Search Salesperson' screen with the following toolbar buttons: New, Open Selected, Open All, Refresh, and Close. The 'New' button is highlighted with a red box.

- b. On Salesperson screen, click the **New** toolbar button.

The screenshot shows the 'Salesperson - Kaye Brown' screen with the following toolbar buttons: New, Save, Search, Delete, Undo, and Close. The 'New' button is highlighted with a red box.

- c. On Salesperson screen, click the **Search** toolbar button. When the **Search Salesperson** screen is displayed, click the **New** toolbar button.

The screenshot shows the 'Salesperson - Kaye Brown' screen with the following toolbar buttons: New, Save, Search, Delete, Undo, and Close. The 'Search' button is highlighted with a red box.

- d. On **Customer screen > Detail** tab, leave the Salesperson field blank and then click the **Salesperson** ellipsis button.

The screenshot shows the 'Customer - Home Dealers' screen with the 'Detail' tab selected. The 'Salesperson' field is highlighted with a red box. The form contains the following information:

- Customer No: 1000000001
- Name: Home Dealers
- Type: Company
- Contact: Sarah Lopez
- Phone: (781) 438-2033 x568
- Email: sarah.lopez@homedealers.com
- Locations: US
- Address: 18 Central St.
- Zip/Postal: 43320
- City: Edison
- State/Province: OH
- Country: United States
- Alt Phone: (515) 954-3542
- Alt Email: s_lopez@homedealers.co
- Mobile: (515) 954-3542
- Fax: (515) 954-3542
- Active: ☒
- PO Required: ☐
- Credit Hold: ☐
- Credit Limit: 0.00
- AR Balance: 0.00
- Account No: (empty)
- Tax No: (empty)
- Ship Via: UPS Ground
- Terms: 5% 5 NET 30
- Currency: USD
- Status: A
- Salesperson: (empty)
- Warehouse: (empty)
- Pricing: None
- Tax State: (empty)
- Tax Code: (empty)

2. Enter the **Salesperson ID**.

3. Enter other necessary details. You can be as detailed as you like. Refer to [Salesperson](#) for the description of each field.

The screenshot shows a web-based form titled "Salesperson - Jared Smith". The form has a toolbar at the top with icons for New, Save, Search, Delete, Undo, and Close. Below the toolbar are tabs for General, Notes, and Attachments. The General tab is active, displaying various fields for a salesperson named Jared Smith. The fields are organized into several sections: Personal Information (Salesperson, Name, Type, Title, Phone, Email), Address (Address, Zip/Postal, City, State/Province, Country, Mobile, Fax, Alt Phone, Internal Notes), Date and Gender (Date Hired, Birth Date, Gender), Marital Status (Marital Status, Spouse), and Commission Details (Commission, Percent). A small profile picture of Jared Smith is visible on the right side of the form. The bottom of the form shows a status bar with "Edited" and a page indicator "Page 1 of 1".

| | | | | | | | |
|-----------------|---------|------------------------|----------------|---------------|----------------------|-------------------------------------|----------|
| Salesperson: | JAS | Name: | Jared Smith | Type: | Sales Representative | | |
| Title: | Manager | Phone: | (800) 240-0041 | Email: | jared_s@homeapp.com | | |
| Address: | | 430 Massachusetts Ave. | Date Hired: | 06/14/2004 | Active: | <input checked="" type="checkbox"/> | |
| Zip/Postal: | | 43146 | City: | Orient | Birth Date: | 01/02/1978 | |
| State/Province: | | OH | Country: | United States | Territory: | | |
| Mobile: | | 760-987-1234 | Fax: | | Marital Status: | Single | |
| Alt Phone: | | | Alt Email: | | Spouse: | | |
| Internal Notes: | | | | | | Terminated: | |
| | | | | | | Reason: | |
| | | | | | | Commission Details | |
| | | | | | | Commission: | Subtotal |
| | | | | | | Percent: | 5.50% |



The **Dispatch** tab will only be displayed when Type is set to Driver.

4. **Save** the record once done.