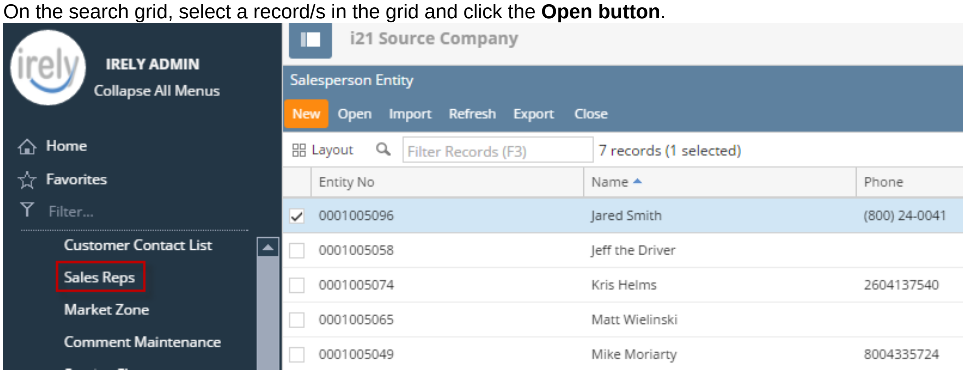
How to Open Salesperson record

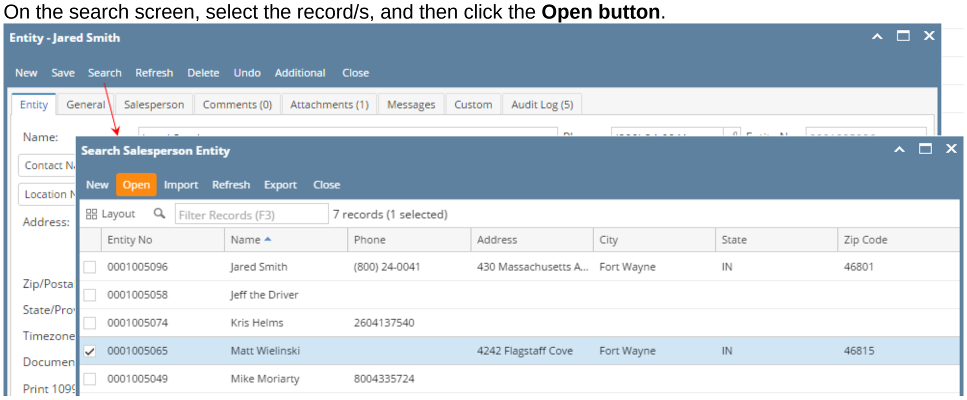
Via Menu

1. On **Sales folder**, click the **Sales Reps menu**. If there is no existing record yet, this will open the Create New Entity screen. If not, this will show the integrated search grid.
2. On the search grid, select a record/s in the grid and click the **Open button**.



Via Entity (Salesperson) screen

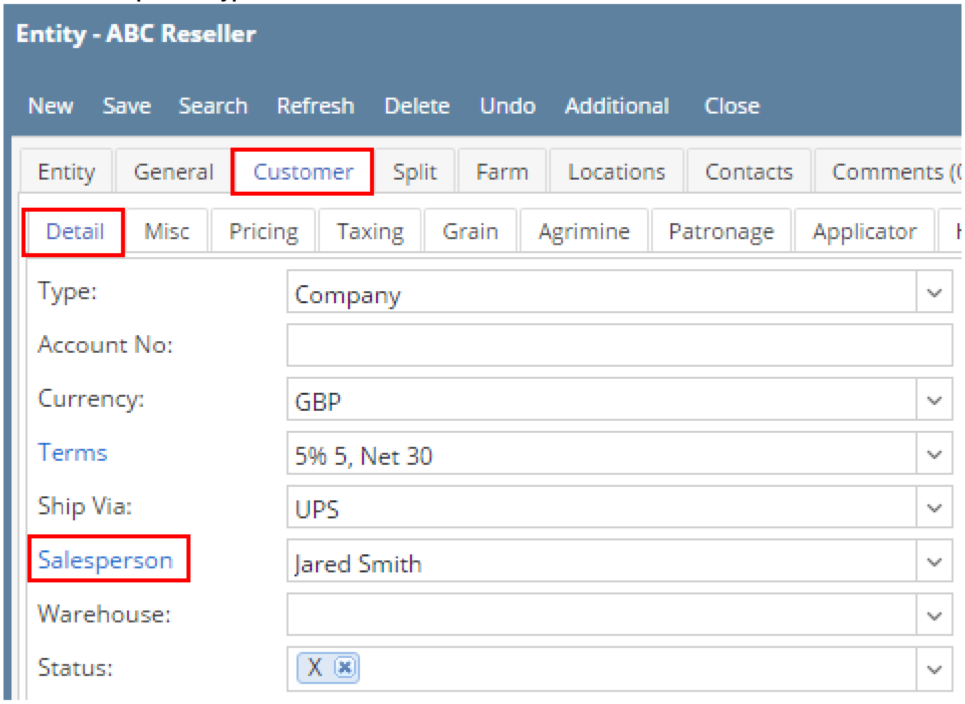
1. Open a salesperson record.
2. Click the **Search button**.
3. On the search screen, select the record/s, and then click the **Open button**.



Via Entity (Customer) screen

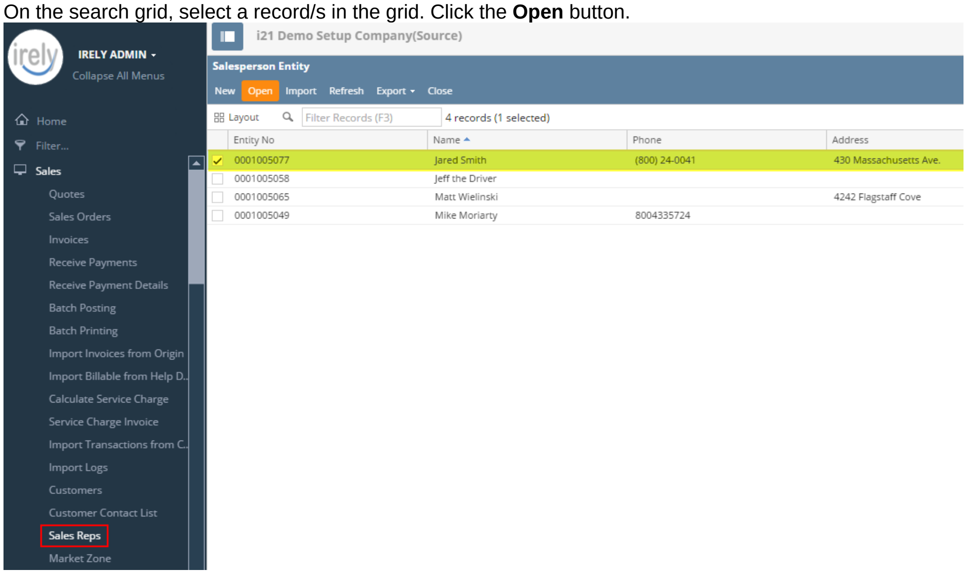
1. Open a customer record.
2. Navigate to **Customer tab | Detail tab**.

3. Click the **Salesperson hyperlink**.



Via Menu

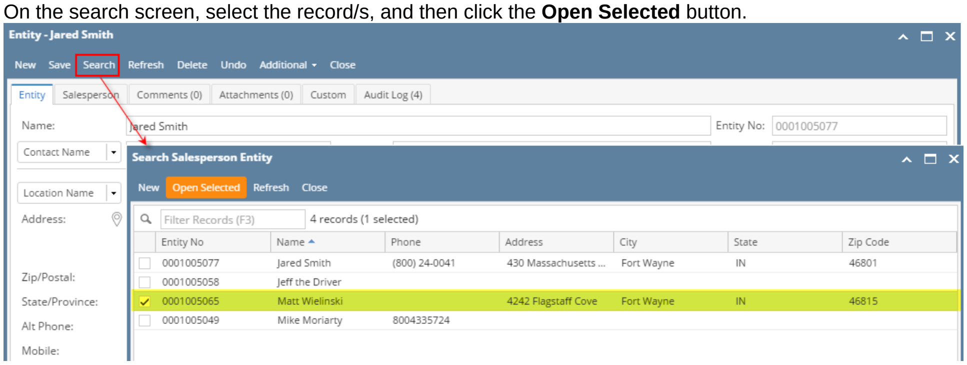
1. On **Sales folder**, click the **Sales Reps menu**. The **Salesperson Entity search grid** will be docked at the center panel.
2. On the search grid, select a record/s in the grid. Click the **Open** button.



Via Entity screen

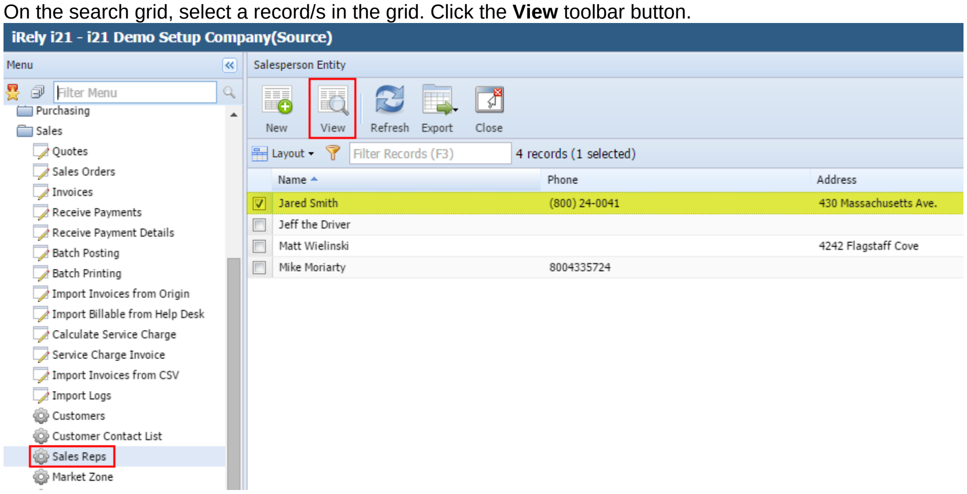
1. Open a salesperson record.
2. Click the **Search** button.

3. On the search screen, select the record/s, and then click the **Open Selected** button.



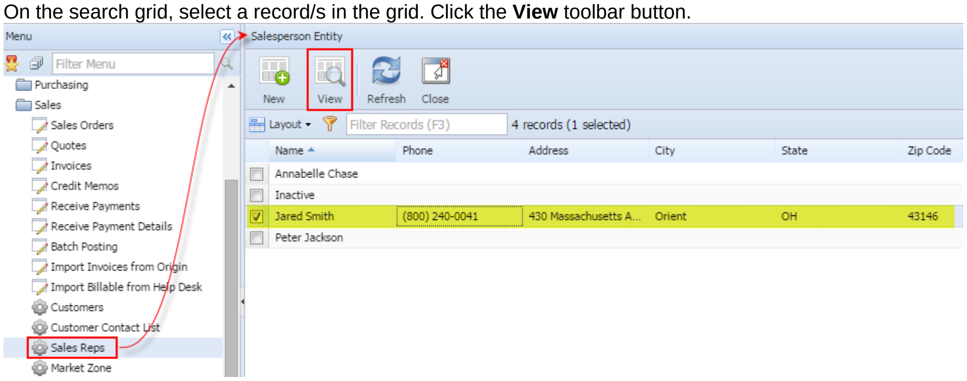
Via Menu

1. On **Sales folder**, click the **Sales Reps menu**. The **Salesperson Entity search grid** will be docked at the center panel.
2. On the search grid, select a record/s in the grid. Click the **View** toolbar button.



Via Menu

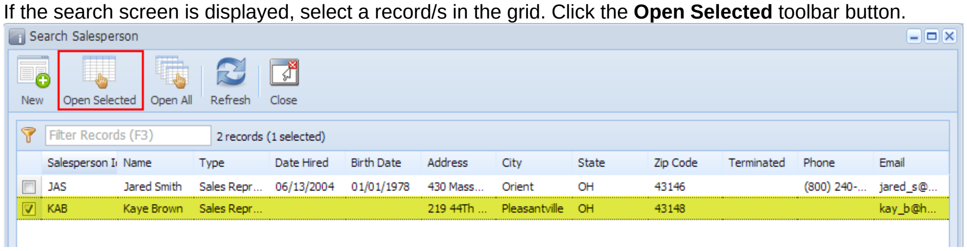
1. On **Sales folder**, click the **Sales Reps menu**. The **Salesperson Entity search grid** will be docked at the center panel.
2. On the search grid, select a record/s in the grid. Click the **View** toolbar button.



There are two ways to view a Salesperson screen.

Via Menu

1. On **Accounts Receivable > Maintenance**, double click the **Salesperson menu**. If there is no existing record, this will open a new Salesperson screen. Otherwise, the Search Salesperson screen will be displayed.
2. If the search screen is displayed, select a record/s in the grid. Click the **Open Selected** toolbar button.



Via Customer screen

1. Open a Customer record.
2. On **Detail tab**, click the **Salesperson ellipsis button**. If the Salesperson field is not blank, the button will open the Salesperson record assigned to the customer. However, if the field is blank, it will open a new Salesperson screen where you can enter a new record..