

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.

The screenshot shows the IRELY ADMIN interface. On the left sidebar, the 'Sales Reps' menu item is highlighted with a red box. The main content area displays the 'Salesperson Entity' search grid. The grid has columns for Entity No, Name, and Phone. The first record, Jared Smith (Entity No: 0001005096, Phone: (800) 24-0041), is selected. The grid also shows buttons for New, Open, Import, Refresh, Export, and Close.

Entity No	Name	Phone
<input checked="" type="checkbox"/> 0001005096	Jared Smith	(800) 24-0041
<input type="checkbox"/> 0001005058	Jeff the Driver	
<input type="checkbox"/> 0001005074	Kris Helms	2604137540
<input type="checkbox"/> 0001005065	Matt Wielinski	
<input type="checkbox"/> 0001005049	Mike Moriarty	8004335724

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.

The screenshot shows the 'Entity - Jared Smith' screen. The 'Search' button is highlighted with a red arrow. The search results grid is displayed, showing columns for Entity No, Name, Phone, Address, City, State, and Zip Code. The first record, Jared Smith (Entity No: 0001005096, Phone: (800) 24-0041, Address: 430 Massachusetts Ave, City: Fort Wayne, State: IN, Zip Code: 46801), is selected. The grid also shows buttons for New, Open, Import, Refresh, Export, and Close.

Entity No	Name	Phone	Address	City	State	Zip Code
<input checked="" type="checkbox"/> 0001005096	Jared Smith	(800) 24-0041	430 Massachusetts Ave	Fort Wayne	IN	46801
<input type="checkbox"/> 0001005058	Jeff the Driver					
<input type="checkbox"/> 0001005074	Kris Helms	2604137540				
<input type="checkbox"/> 0001005065	Matt Wielinski		4242 Flagstaff Cove	Fort Wayne	IN	46815
<input type="checkbox"/> 0001005049	Mike Moriarty	8004335724				

Via Entity (Customer) screen

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

- Click the **Salesperson** hyperlink.

Entity - ABC Reseller

New Save Search Refresh Delete Undo Additional Close

Entity General **Customer** Split Farm Locations Contacts Comments (0)

Detail Misc Pricing Taxing Grain Agrimine Patronage Applicator

Type: Company

Account No:

Currency: GBP

Terms: 5% 5, Net 30

Ship Via: UPS

Salesperson: Jared Smith

Warehouse:

Status: X

Via Menu

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

i21 Demo Setup Company(Source)

Salesperson Entity

New Open Import Refresh Export Close

Layout Filter Records (F3) 4 records (1 selected)

Entity No	Name	Phone	Address
<input checked="" type="checkbox"/> 0001005077	Jared Smith	(800) 24-0041	430 Massachusetts Ave.
<input type="checkbox"/> 0001005058	Jeff the Driver		
<input type="checkbox"/> 0001005065	Matt Wielinski		4242 Flagstaff Cove
<input type="checkbox"/> 0001005049	Mike Moriarty	8004335724	

Via Entity screen

- Open a salesperson record.
- Click the **Search** button.

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

Entity - Jared Smith

New Save Search Refresh Delete Undo Additional Close

Entity Salesperson Comments (0) Attachments (0) Custom Audit Log (4)

Name: Jared Smith Entity No: 0001005077

Contact Name

Location Name

Address:

Zip/Postal:

State/Province:

Alt Phone:

Mobile:

Search Salesperson Entity

New Open Selected Refresh Close

Filter Records (F3) 4 records (1 selected)

Entity No	Name	Phone	Address	City	State	Zip Code
<input type="checkbox"/> 0001005077	Jared Smith	(800) 24-0041	430 Massachusetts ...	Fort Wayne	IN	46801
<input type="checkbox"/> 0001005058	Jeff the Driver					
<input checked="" type="checkbox"/> 0001005065	Matt Wielinski		4242 Flagstaff Cove	Fort Wayne	IN	46815
<input type="checkbox"/> 0001005049	Mike Moriarty	8004335724				

Via Menu

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

iRely i21 - i21 Demo Setup Company(Source)

Menu Filter Menu

Purchasing

Sales

Quotes

Sales Orders

Invoices

Receive Payments

Receive Payment Details

Batch Posting

Batch Printing

Import Invoices from Origin

Import Billable from Help Desk

Calculate Service Charge

Service Charge Invoice

Import Invoices from CSV

Import Logs

Customers

Customer Contact List

Sales Reps

Market Zone

Salesperson Entity

New View Refresh Export Close

Layout Filter Records (F3) 4 records (1 selected)

Name	Phone	Address
<input checked="" type="checkbox"/> Jared Smith	(800) 24-0041	430 Massachusetts Ave.
<input type="checkbox"/> Jeff the Driver		
<input type="checkbox"/> Matt Wielinski		4242 Flagstaff Cove
<input type="checkbox"/> Mike Moriarty	8004335724	

Via Menu

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Menu Filter Menu

Purchasing

Sales

Sales Orders

Quotes

Invoices

Credit Memos

Receive Payments

Receive Payment Details

Batch Posting

Import Invoices from Origin

Import Billable from Help Desk

Customers

Customer Contact List

Sales Reps

Market Zone

Salesperson Entity

New View Refresh Close

Layout Filter Records (F3) 4 records (1 selected)

Name	Phone	Address	City	State	Zip Code
<input type="checkbox"/> Annabelle Chase					
<input type="checkbox"/> Inactive					
<input checked="" type="checkbox"/> Jared Smith	(800) 240-0041	430 Massachusetts A...	Orient	OH	43146
<input type="checkbox"/> Peter Jackson					

There are two ways to view a Salesperson screen.

Via Menu

- 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.
- If the search screen is displayed, select a record/s in the grid. Click the **Open Selected** toolbar button.

Search Salesperson

New Open Selected Open All Refresh Close

Filter Records (F3) 2 records (1 selected)

Salesperson Id	Name	Type	Date Hired	Birth Date	Address	City	State	Zip Code	Terminated	Phone	Email
<input type="checkbox"/> JAS	Jared Smith	Sales Repr ...	06/13/2004	01/01/1978	430 Mass...	Orient	OH	43146		(800) 240-...	jared_s@...
<input checked="" type="checkbox"/> KAB	Kaye Brown	Sales Repr ...			219 44Th ...	Pleasantville	OH	43148			kay_b@h...

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..

The screenshot shows the 'Customer - Home Dealers' window with the 'Detail' tab selected. The window contains various fields for customer information, including Customer No, Name, Type, Contact, Phone, Email, Locations, Address, Zip/Postal, City, State/Province, Country, Alt Phone, Alt Email, Mobile, Website, Active, PO Required, Credit Hold, Credit Limit, AR Balance, Account No, Tax No, Ship Via, Terms, Currency, Status, Salesperson, Warehouse, Pricing, Tax State, and Tax Code. The 'Salesperson' field is highlighted with a red box, and an ellipsis button is visible next to it.

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