

How to Add a Sales Representative 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' screen with the 'Entity' tab selected. The form contains the following fields and values:

- Name: Jared Smith
- Phone: (800) 24-0041
- Entity No: 0001005096
- Contact Name: Jared Smith
- Email: jared_smith@homeapp.com
- Mobile: (blank)
- 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: (blank)
- Print 1099: ☐ 1099 Name: (blank)
- 1099 Form: (blank)
- 1099 Type: (blank)
- Federal Tax ID: (blank)
- W9 Signed: (blank)
- Internal Notes: (blank)

On the right side, there are two sections: 'Contact Information' and 'Entity Type'. The 'Entity Type' section has a dropdown menu with 'Salesperson' selected.

3. Navigate to **Salesperson tab** and fill out the fields.

- a. Set **Type** to **Sales Representative**.
- 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' screen with the 'Salesperson' tab selected. The form contains the following fields and values:

- Type: Sales Representative
- Date Hired: 6/14/2004
- Birth Date: 1/2/1978
- Gender: Male
- Territory: OH
- Marital Status: Single
- Spouse: (blank)
- Active: ☒
- Employment History: Terminated: (blank), Reason: (blank)
- Commission Details: Commission: Subtotal, Percent: 3.50%
- Signature: Signature File: jaredsmithsignature.png

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
<input type="checkbox"/> 0001005058	Jeff the Driver		
<input type="checkbox"/> 0001005065	Matt Wielinski		4242 Flagstaff Cove
<input type="checkbox"/> 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 **Entity** 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

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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.

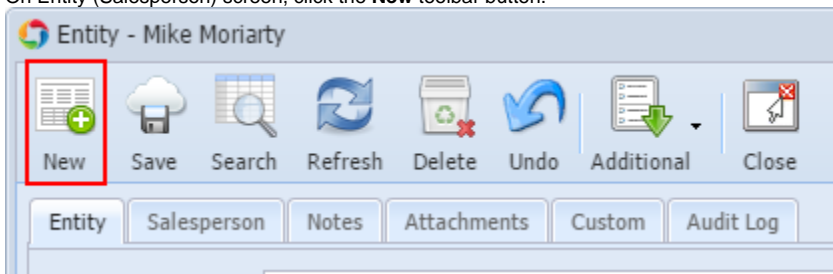
1. Open a new Salesperson screen. There are three ways to do this.
- On **Sales** folder, click the **Sales Reps** menu. When the **Salesperson Entity** search grid is displayed, click the **New** toolbar button.

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.

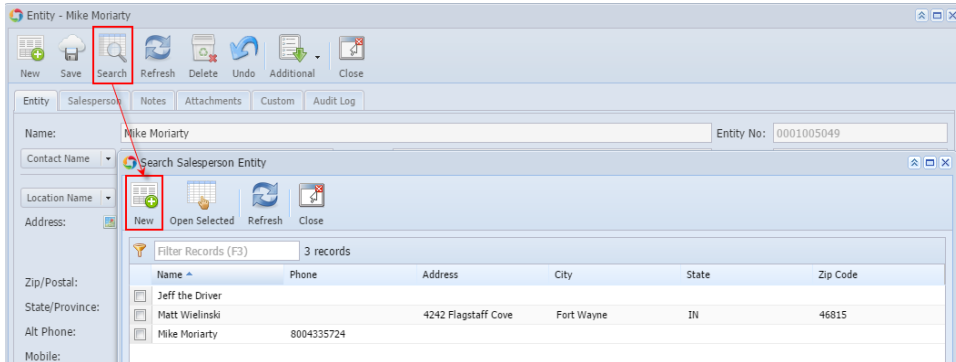
Salesperson Entity search grid:

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

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



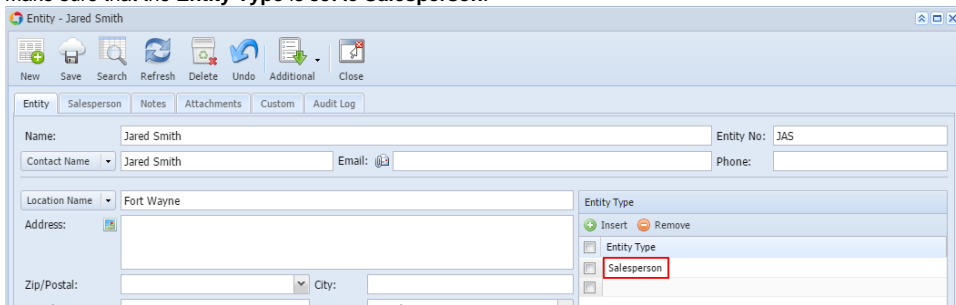
- c. On Entity (Salesperson) screen, click the **Search** toolbar button. When the **Search Salesperson Entity** screen is displayed, click the **New** toolbar button.



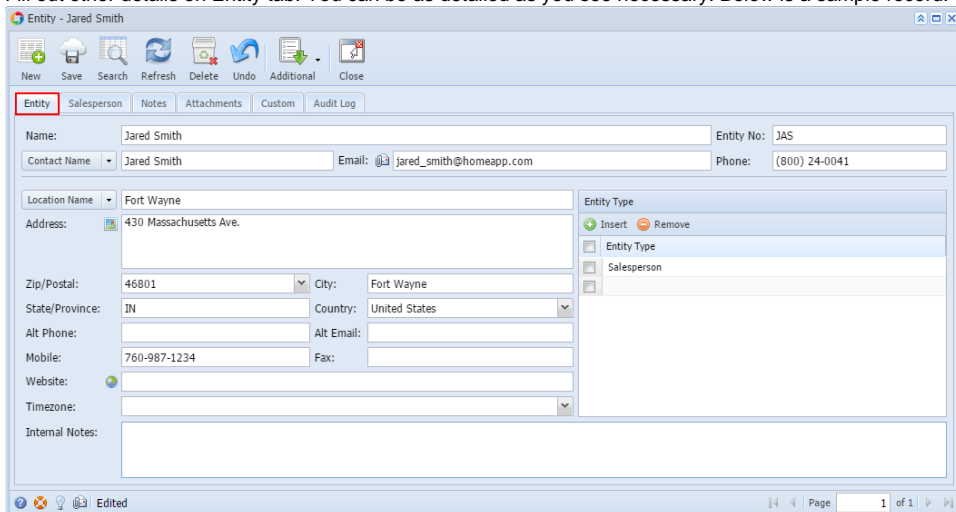
Note that the New button will open the [Create New Entity](#) screen. You can either fill out this screen or simply close it, and proceed with the following steps.

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.

Entity - Jared Smith

Entity **Salesperson** Notes Attachments Custom Audit Log

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: 5.50%

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

Entity - Jared Smith

Entity **Salesperson** Notes Attachments Custom Audit Log

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: 5.50%

Dispatch

Notification:

Message:

Page 1 of 1

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.

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) 3 records

Name	Phone	Address	City	State	Zip Code
<input type="checkbox"/> Annabelle Chase					
<input type="checkbox"/> Inactive					
<input type="checkbox"/> 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: [dropdown] 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]

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

Entity - Jared Smith

New Save Search Refresh Undo Additional Close

Entity **Salesperson** Notes Attachments

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: 5.500000%

Dispatch
Notification: Message:

Edited Page 1 of 1

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.

Search Salesperson

New Open Selected Open All Refresh Close

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

Salesperson - Kaye Brown

New Save Search Delete Undo Close

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

Salesperson - Kaye Brown

New Save Search Delete Undo Close

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

Customer - Home Dealers

New Save Search Delete Undo Additional Close

Detail Additional Locations Contacts Notes History Attachments Custom Messages Setup Additional Setup

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: Website: www.homedealers.com

Active: ☒ PO Required: ☐ Credit Hold: ☐
Credit Limit: 0.00 AR Balance: 0.00
Account No: Tax No:
Ship Via: UPS Ground Terms: 5% 5 NET 30
Currency: USD Status: A
Salesperson: Warehouse:
Pricing: None
Tax State: Tax Code:

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 for a salesperson named Jared Smith. The form is titled "Salesperson - Jared Smith" and has tabs for "General", "Notes", and "Attachments". The "General" tab is active. The form contains the following fields:

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

The form also includes a profile picture of Jared Smith and a status bar at the bottom indicating "Page 1 of 1".



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

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