Setting up Sales Persons

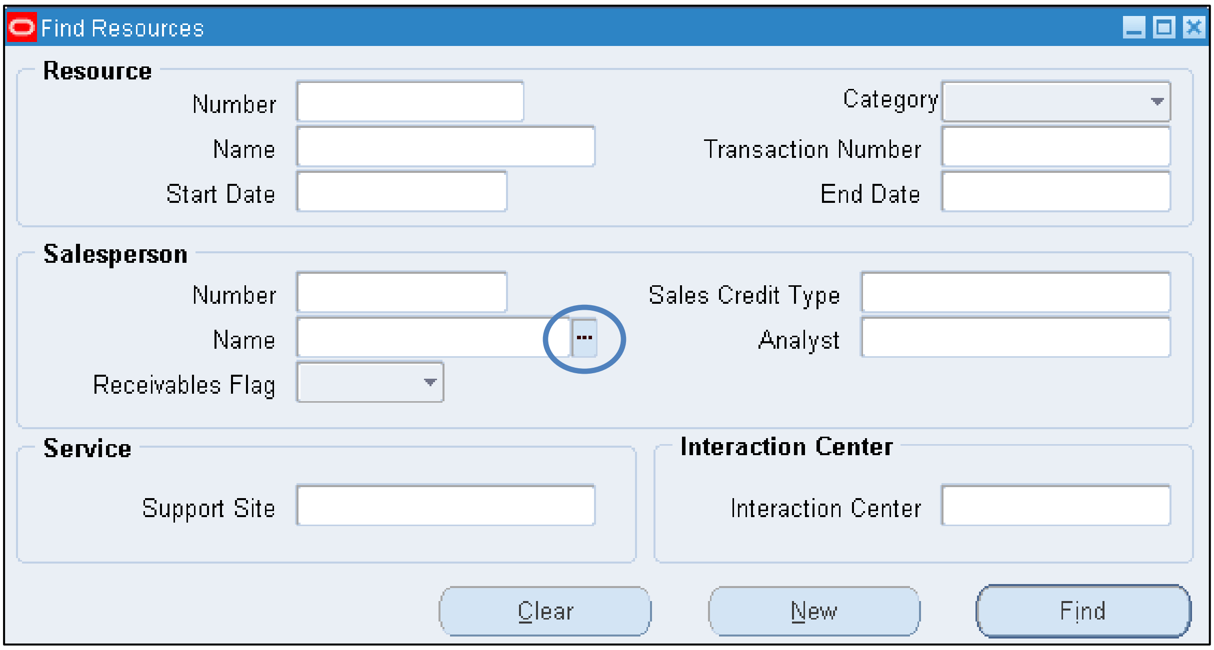
The ‘Sales Person’ is usually the person who raises the invoice or credit note. Contact details of the sales person will print out on the top of each invoice/credit note, providing details to the customer should they need to contact in case of a query.

The accounts team within each department is set up as the default but you can add individual details too. Each department is set up with a range of ten numbers, which must be manually entered in order for you to set up departmental Salespersons.

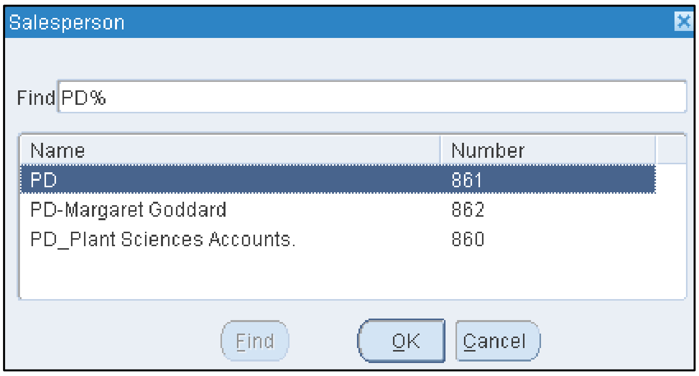
Step 1: Identifying the Salesperson Number

Responsibility: **CAPSA AR Supervisor / U.F.S AR Manager**
Navigate to: **Set up → Salesperson**

a) Click in to the **List of Values** in the **Name** field.



b) Enter your **department code** followed by the **wildcard (%)** and click **Find.**



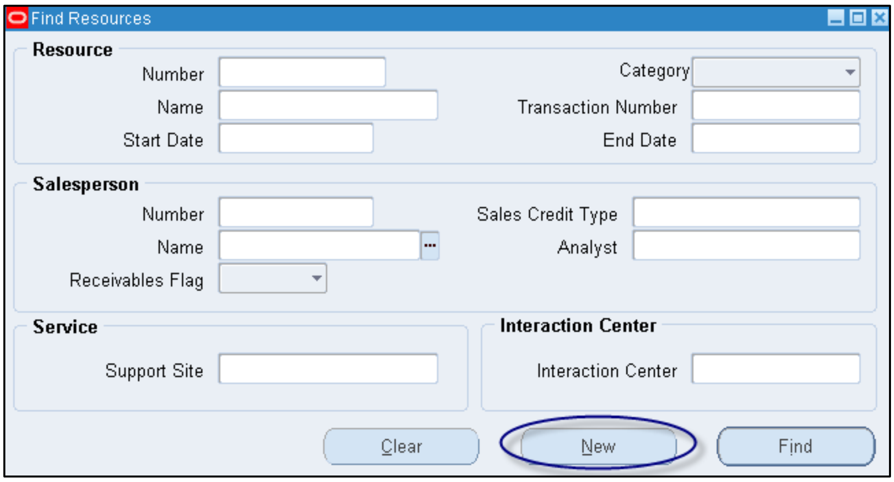
*In this example we can see that the range of numbers here are **860 – 869**. The next available number to use would be **863**.*

Remember that it is possible for other users not to follow this procedure and use your departmental numbers. The system will notify you if the salesperson number is already in use, therefore you will have to select a different number.

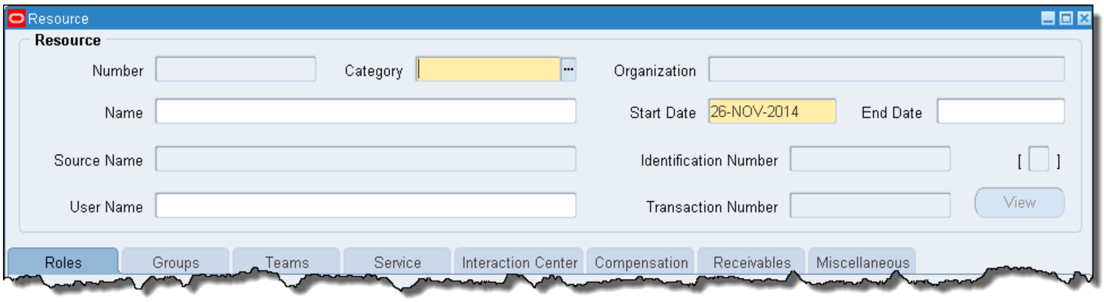
c) Click on **Cancel** to go back to the **Find Resources** screen.

Step 2: Creating the Salesperson

d) Click on **New** in the ***Find Resources*** screen.



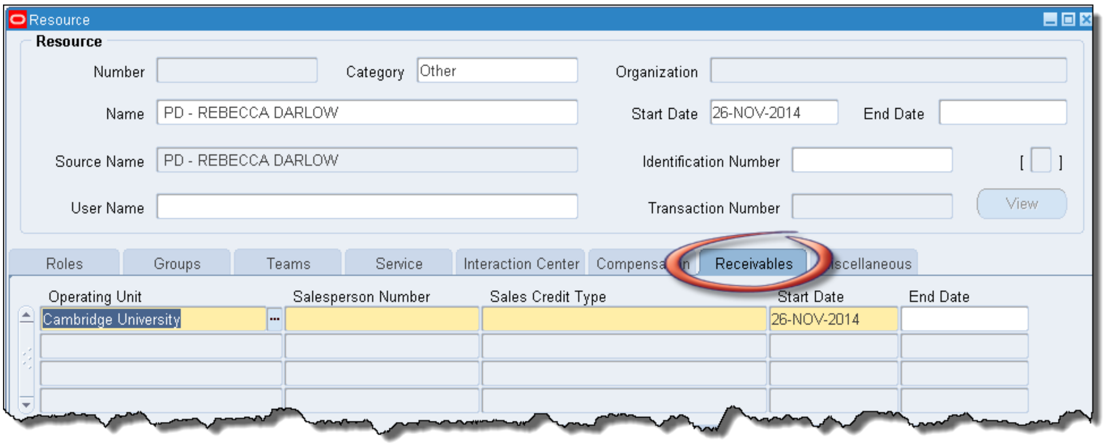
e) The ***Resource*** screen displays where the following fields need populating:



- **Category** — Select **Other** from the list of values
- **Name** — Enter your **two letter department code** followed by **space**, **hyphen**, **space** and **your name all in upper case**

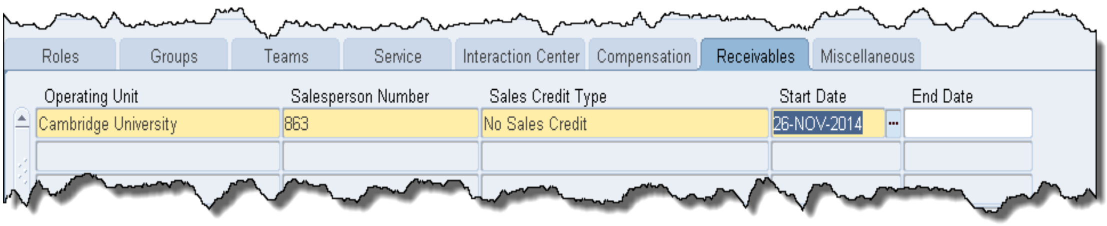
Step3: Receivable tab

f) Click on the **Receivables** tab.



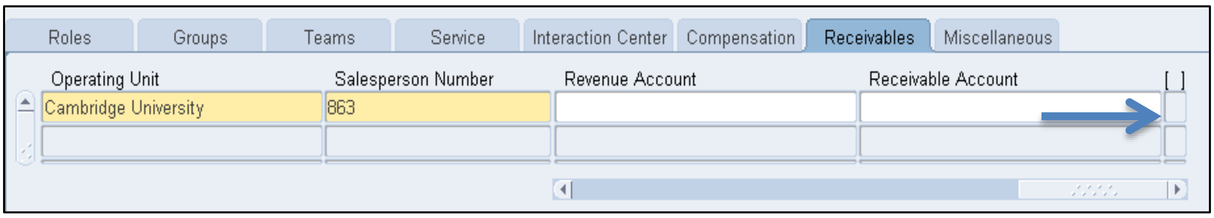
g) Populate the following fields:

- **Operating Unit** will default in as Cambridge University.
- **Salesperson Number** – enter the number identified from step 1.
- **Sales Credit Type** – click on the list of values and **No Sales Credit** will default in**.**

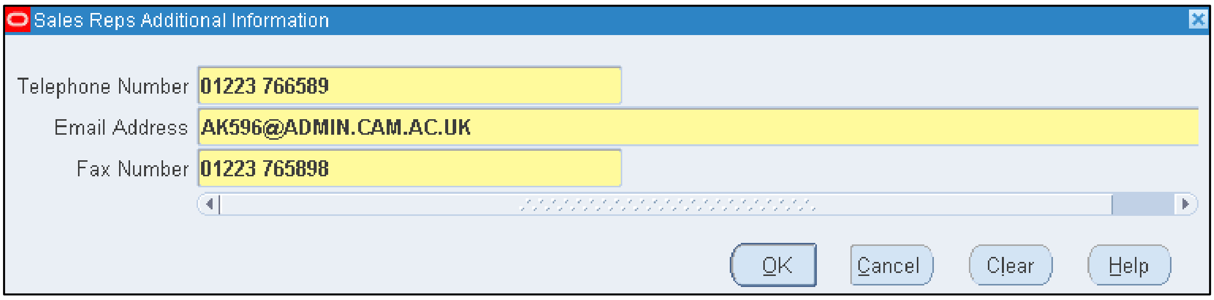


Step 4: Additional Information

- Using the scroll bar, scroll to the end and click in the flex field which will display the **Sales Rep Additional Information** box.



- Populate the following fields:
  - **Telephone Number**
  - **Email Address**
  - **Fax Number**



a) Click **OK.** — The system will return to previous window and default into the next available line, click back into the line created.

b) **Save** — The Salesperson is now complete and ready to use when raising invoices/credit memos.