



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.

The 'Find Resources' dialog box contains several sections:

- Resource:** Number, Name, Start Date, Category, Transaction Number, End Date.
- Salesperson:** Number, Name (with a blue circle around the dropdown arrow), Receivables Flag, Sales Credit Type, Analyst.
- Service:** Support Site.
- Interaction Center:** Interaction Center.

Buttons at the bottom: Clear, New, Find.

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

The 'Salesperson' dialog box shows a search for 'PD%' in the 'Find' field. The results table is as follows:

Name	Number
PD	861
PD-Margaret Goddard	862
PD_Plant Sciences Accounts.	860

Buttons at the bottom: Find, OK, Cancel.

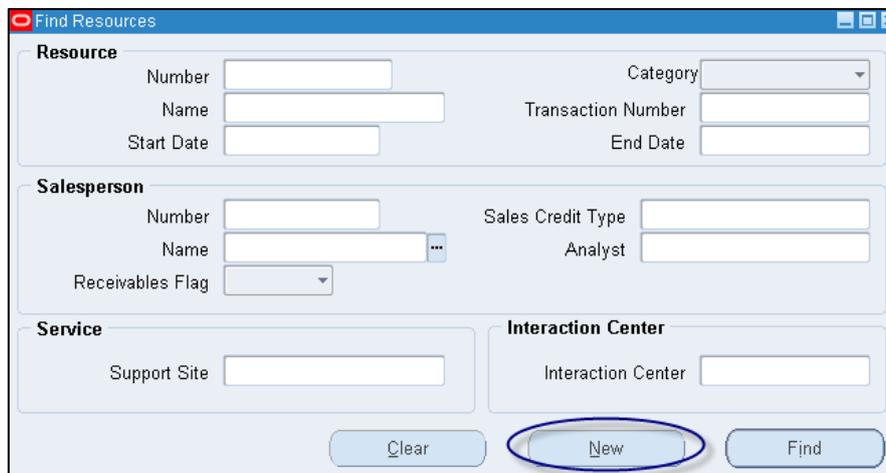
*In this example we can see that the range of numbers here are **860 – 869**. The next available number to use would be **863**.*

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.



The screenshot shows the 'Find Resources' dialog box with the following fields and buttons:

- Resource** section: Number, Name, Start Date, Category (dropdown), Transaction Number, End Date.
- Salesperson** section: Number, Name, Receivables Flag (dropdown), Sales Credit Type, Analyst.
- Service** section: Support Site.
- Interaction Center** section: Interaction Center.
- Buttons: Clear, **New** (circled in blue), Find.

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



The screenshot shows the 'Resource' screen with the following fields and buttons:

- Number, Category (highlighted in yellow), Organization.
- Name, Start Date (26-NOV-2014), End Date.
- Source Name, Identification Number, [] button.
- User Name, Transaction Number, View button.
- Bottom tabs: Roles, Groups, Teams, Service, Interaction Center, Compensation, Receivables, Miscellaneous.

- **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**

Sales Reps Additional Information

Telephone Number 01223 766589

Email Address AK596@ADMIN.CAM.AC.UK

Fax Number 01223 765898

OK Cancel Clear Help

- 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.