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 of which the customer should contact in case of a query.

The accounts team within each department is set up as the default but you can add your own details too.

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Step 1: Identifying the Salesperson Number

Each department is set up with a range of ten numbers, which must be manually entered in order for you to set up their departmental Salespersons. Carry out the step below, to locate your department’s range of numbers.

**a)** Select the list of values for the Salesperson name

- This will now open up the Salespersons dialogue box to enter your search criteria.
- Enter your two letter department code followed by the wildcard (%).
- Click ‘Find’.
Remember that it is possible for other users not to follow this procedure and use your numbers assigned. The system will notify you to advise you that the salesperson number is already in use, therefore you will have to select a different number.

b) Click on ‘Cancel’ and this will take you back to the resources screen.

Step 2: Creating the Salesperson

a) Click on ‘New’ in the Find Resources screen

b) Populate the following fields:

- **Category**: Click on the list of values and select ‘Other’.
- **Name**: Enter your two letter department code followed by hyphen and your name all in upper case.
- **Source Name**: This will default in from the Name field.

c) Click on the Receivables tab
d) Populate the following fields:

- **Operating Unit**: Will default in.
- **Salesperson Number**: Enter the number you have selected.
- **Sales Credit Type**: Click on the list of values and **No Sales Credit** will default in.

![Image of Resource screenshot]

```
<table>
<thead>
<tr>
<th>Operating Unit</th>
<th>Salesperson Number</th>
<th>Sales Credit Type</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cambridge University</td>
<td>963</td>
<td>No Sales Credit</td>
<td>17-FEB-2014</td>
</tr>
</tbody>
</table>
```

e) Using the scroll bar, scroll across to the end and click in the flex field which will populate the **Sales Rep Additional Information** box.

![Image of Resource screenshot]

```
<table>
<thead>
<tr>
<th>Operating Unit</th>
<th>Salesperson Number</th>
<th>Revenue Account</th>
<th>Receivable Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cambridge University</td>
<td>963</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

f) Populate the following fields:

- **Telephone Number**: Enter your direct dial number or departmental phone number.
- **Email Address**: Enter your email address or a departmental address.
- **Fax Number**: Your departmental fax number if you have one.

![Image of Resource screenshot]

```
<table>
<thead>
<tr>
<th>Telephone Number</th>
<th>Email Address</th>
<th>Fax Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>01233 765689</td>
<td><a href="mailto:ak9n6@admin.cam.ac.uk">ak9n6@admin.cam.ac.uk</a></td>
<td>01223 765689</td>
</tr>
</tbody>
</table>
```

g) Click ‘**OK**’ after details entered.

h) Click on **Save** and your Salesperson is now complete and ready to use when you start to raise your invoices.