



Process Documentation

Department:

Customer Support

Last Updated:

10/17/2024 8:59 AM

NAME OF PROCESS**Adding a New Sales Rep [RolePlay]****Use Case / Objectives**

Allow user to add a new sales rep for rentals and/or sales

Menu options to access:


Main Operations => Cross Application File => Sales Rep

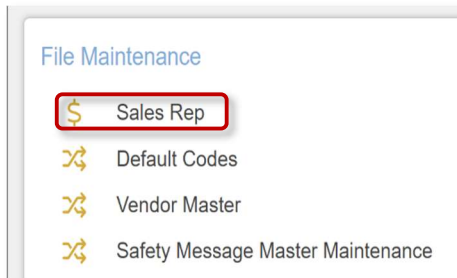
Reporting

- Open Contracts
- Revenue
- Utilization

Adding a New Sales Rep [RolePlay]

Process Steps

1. Log into the [Roleplay](#) environment using your credentials.
2. Click on the Cross Application File menu  and under the **File Maintenance** section, click on Sales Rep.



- a. The **Sales Rep Maintenance** screen opens.

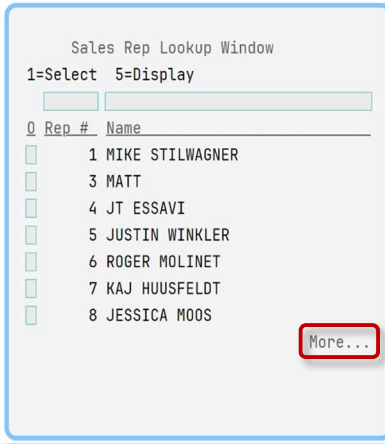


3. Click on the Sales Rep # field and either press F04 on the keyboard or click on the F04 Search bar on the screen.



4. The Sales Rep Lookup Window displays.

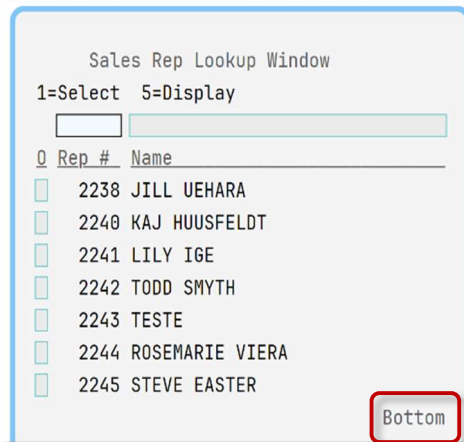
NOTE: On the bottom of the screen, it will show *More...* if there are additional records.



Sales Rep Lookup Window
1=Select 5=Display


0	Rep #	Name
<input type="checkbox"/>	1	MIKE STILWAGNER
<input type="checkbox"/>	3	MATT
<input type="checkbox"/>	4	JT ESSAVI
<input type="checkbox"/>	5	JUSTIN WINKLER
<input type="checkbox"/>	6	ROGER MOLINET
<input type="checkbox"/>	7	KAJ HUUSFELDT
<input type="checkbox"/>	8	JESSICA MOOS

5. Scroll down until *Bottom* displays and make note of the last *Rep #* listed.



Sales Rep Lookup Window
1=Select 5=Display

0	Rep #	Name
<input type="checkbox"/>	2238	JILL UEHARA
<input type="checkbox"/>	2240	KAJ HUUSFELDT
<input type="checkbox"/>	2241	LILY IGE
<input type="checkbox"/>	2242	TODD SMYTH
<input type="checkbox"/>	2243	TESTE
<input type="checkbox"/>	2244	ROSEMARIE VIERA
<input type="checkbox"/>	2245	STEVE EASTER

6. Click on the *Back option* . Either click on the *F6 key* or press the *F06 Add* option in the Display Functions menu.



Display Functions

F03 Exit

F04 Search

F06 Add

F10 Inquiry

F11 Maintenance

F12 Previous

- The **Sales Rep Maintenance** screen opens in Add Mode to enter new Sales Rep information.

9/10/24 11:32:56 Sales Rep Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Mode: **ADD**

Sales rep #:

Name: User profile:
 Address 1: Alt rep#:
 Address 2:
 City: State:
 Zip code: Fax #:
 Phone: Alt. phone:
 E-mail:
 Start date: 9/10/24 Termination date:
 Region:
 Territory: Location: DMO
 Commission %:
 Needs 1099: (Y/N)
 Region V.P.:
 District mgr:
 Sales mgr:
 Position:

- Enter data in the corresponding fields for the new Sales Rep and press enter.
 - Data appears as entered in the corresponding fields.
 - The user is returned to the **Sales Rep Maintenance** screen.

9/10/24 11:02:20 Sales Rep Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO

Sales rep #:

- Press F04 on the keyboard or click on the *F04 Search* bar on the screen to open the *Sales Rep Lookup Window*.
- Either scroll down or enter part of the user's name in the *Name Search* field to verify that your new Sales Rep was added to the system and that the Sales Rep number generated is the next number in the sequence.

Sales Rep Lookup Window

1=Select 5=Display

DAN

Rep #	Name
10	DANAS SALESREP