

Sales Agent Maintenance 

Home 

Home

Nevada Jones, Inc - Henderson [Sales Orders](#) > [SO12345](#) > Customer: Nevada Jones, Inc - Henderson: Authorized to Charge List

NVj001 • Ship-to Seq #1

## Customer: Nevada Jones, Inc - Henderson

546 2nd Ave, Henderson NV, 89002  
(555) 402 - 9117 • sales@NVjones.com

Primary Contact: Brian Wilson  
(555) 402 - 9117 • bwilson@NVjones.com

Sales Agent: Sarah Smith

### Individuals Authorized to Charge

[+ Add Individual](#)

<input type="checkbox"/>	Name :	Job Title :
	John Smith	Corporate Sales
	Sarah Carter	Corporate Sales
	Ben Stark	Corporate Sales
	Jen Piper	Corporate Sales
	Drake Adams	Corporate Sales
	Eric Mills	Corporate Sales
	Frank Loyd	Corporate Sales

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Home

Customers X

Customers

## Customers

## Search Criteria

Customer ID

Level to View

Seq #

Search

## Search Results



<input type="checkbox"/> Customer ID :	Customer Name :	Address 1 :	Address 2 :	City :	State :
<input type="checkbox"/> NVj001	Nevada Jones, Inc	123 Center Way		Northridge	NV

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Home X Data Files X Sales Agent Maintenance X

Data Files > Sales Order Settings > Sales Agents

## Sales Order Settings



### Sales Agents

## Sales Agent Maintenance

### Search Criteria

Search by

Sales Agent ID  First Name  Last Name

#### Sales Agent ID

**Search**

### Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Action :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	
<input type="checkbox"/> 12346	Constantine	John	JCONST	
<input checked="" type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN	
<input type="checkbox"/> 12345	Isley	Pamela	POISON	
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA	

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Bruce Wayne

BWAYNE • 12347

**Sales Agent ID (required)**

12347

**Notification User ID**

Placeholder



**Printed ID (required)**

BWAYNE

**Department**

Hardware

**First Name**

Bruce

**Social Security Number**

.....

**Last Name**

Wayne

**Remarks**

Placeholder

**Address 1**

Placeholder

**Address 2**

Placeholder

**City**

Gotham

**State**

IL

Home

Nevada Jones, Inc - Henderson

Customers &gt; Customer: Nevada Jones, Inc - Henderson: Quotes/Orders- Item Order History

Customer Info

Credit Profile

Quotes/Orders

Quotes

Sales Orders

Item Order History

Invoices

Payments

Doc Storage

NVj001 • Ship-to Seq #1

## Customer: Nevada Jones, Inc - Henderson

546 2nd Ave, Henderson NV, 89002

(555) 402 - 9117 • sales@NVjones.com

Primary Contact: Brian Wilson

(555) 402 - 9117 • bwilson@NVjones.com

Sales Agent: Sarah Smith

### Item Order History

Search by

 Item  Product Group  SO ID

Major From

To

Minor From

To

All

All

All

All

Since

01/25/23

 Include credit memos Include group items

Search

### Search Results

 Show costs Show detail view

Add to New Quote

Add to New Sales Order

<input type="checkbox"/>	Invoiced Date :	Tran ID :	Item :	Discount :	Dimension :	Shipment # :	Invoiced Qty :	Qty UOM :	Action :
<input type="checkbox"/>	06/22/22	373	KP-Item-1			1	0.5000	EA	
<input type="checkbox"/>	06/22/22	371	KP-Item-SL		1X6X08	1	3.0000	BF	
<input type="checkbox"/>	06/22/22	363	KP-Item-3	10.00%		1	15.0000	EA	
<input type="checkbox"/>	06/22/22	355	KP-Item-1			1	10.0000	EA	
<input type="checkbox"/>	06/22/22	355	KP-Item-3			1	5.0000	EA	
<input type="checkbox"/>	06/22/22	351	Item-SG		36"X96"	1	1.0000	SF	

## Sales Agent Maintenance

### Search Criteria

Search by

Sales Agent ID  First Name  Last Name

#### Sales Agent ID

Search

Show Active Only

### Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Action :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	
<input type="checkbox"/> 12346	Constantine	John	JCONST	
<input type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN	
<input type="checkbox"/> 12345	Isley	Pamela	POISON	
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA	

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#### Sales Agent ID (required)

Placeholder

#### Notification User ID

Placeholder



#### Printed ID (required)

Placeholder

#### Department

Placeholder

Active

#### Social Security Number

000-000-0000

#### First Name

Placeholder

#### Remarks

Placeholder

#### Last Name

Placeholder

#### Address 1

Placeholder

#### Address 2

Placeholder

#### City

Placeholder

#### State

Placeholder

#### ZIP

#### Country

## Sales Agent Maintenance

### Search Criteria

Search by

Sales Agent ID  First Name  Last Name

#### Sales Agent ID

Search

Show Active Only

### Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Action :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	
<input type="checkbox"/> 12346	Constantine	John	JCONST	
<input checked="" type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN	
<input type="checkbox"/> 12345	Isley	Pamela	POISON	
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA	

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Sales Agent ID (required)

12347

Notification User ID

Placeholder



Printed ID (required)

BWAYNE

Department

Hardware

Active

Social Security Number

.....

First Name

Bruce

Remarks

Placeholder

Last Name

Wayne

Address 1

Placeholder

Address 2

Placeholder

City

Gotham

State

IL

ZIP

Country

Home X Data Files X Sales Agent Maintenance X

Data Files &gt; Sales Order Settings &gt; Sales Agent Maintenance

## Sales Agent Maintenance

+ Create Sales Agent

## Search Criteria

Search by

Sales Agent ID

Search for

12

Search

 Show Active Only

## Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :	Action :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	✓	Omaha	
<input type="checkbox"/> 12346	Constantine	John	JCONST	✓	N	Edit
<input type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	✓	G	Delete
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	✓	Gotham	
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	✓	Gotham	
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN		Gotham	
<input type="checkbox"/> 12345	Isley	Pamela	POISON		Gotham	
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA		Gotham	

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Home X Data Files X Sales Agent Maintenance X

Data Files &gt; Sales Order Settings &gt; Sales Agent Maintenance

## Sales Agent Maintenance

+ Create Sales Agent

## Search Criteria

Search by

Search for

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Search

 Show Active Only

Sales Agent ID

First Name

Last Name

	Last Name :	First Name :	Printed ID :	Active :	City :	Action :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	✓	Omaha	
<input type="checkbox"/> 12346	Constantine	John	JCONST	✓	New Yo	
<input type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	✓	Gotham	
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	✓	Gotham	
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	✓	Gotham	
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN		Gotham	
<input type="checkbox"/> 12345	Isley	Pamela	POISON		Gotham	
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA		Gotham	

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## Create Sales Agent



**Sales Agent ID (required)**

Placeholder

**Printed ID (required)**

Placeholder

Active

**First Name**

Placeholder

**Last Name**

Placeholder

**Address 1**

Placeholder

**Address 2**

Placeholder

**Notification User ID**

Placeholder



**Department**

Placeholder

**Social Security Number**

000-000-0000

**City**

Placeholder

**State**

Placeholder

**ZIP**

Placeholder

**Country**

Placeholder



**Email**

hello@batman.com

**Phone extension**

Placeholder

**Remarks**

Placeholder

Cancel

Save

## Edit Sales Agent



Sales Agent ID (required)

12367

Printed ID (required)

TSUTTON

Active

First Name

Tamara

Last Name

Sutton

Address 1

Placeholder

Address 2

Placeholder

Notification User ID

Placeholder



Remarks

Placeholder

Department

Roofing

Social Security Number

000-000-0000

City

Placeholder

State

Placeholder

ZIP

Placeholder

Country

Placeholder



Email

tsutton@buildingsupply.com

Phone extension

Placeholder

Delete

Cancel

Save

Home X Data Files X Sales Agent Maintenance X

Data Files &gt; Sales Order Settings &gt; Sales Agent Maintenance

## Sales Agent Maintenance

+ Create Sales Agent

## Search Criteria

Search by

Sales Agent ID

Search for

12

Search

 Show Active Only

## Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	✓	Omaha
<input type="checkbox"/> 12346	Constantine	John	JCONST	✓	New York City
<input type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	✓	Gotham
<input checked="" type="checkbox"/> 12348	Gordon	Barbara	BGORDO	✓	Gotham
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	✓	Gotham
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN		Gotham
<input type="checkbox"/> 12345	Isley	Pamela	POISON		Gotham
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA		Gotham

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Home X Data Files X Sales Agent Maintenance X

Data Files &gt; Sales Order Settings &gt; Sales Agent Maintenance &gt; Edit Sales Agent: Bruce Wayne

## Sales Agent Maintenance

Edit Sales Agent  Active

Sales Agent ID (required)

12358

Printed ID (required)

BGORDON

Address 1

Placeholder

Address 2

Placeholder

Email

hello@batman.com

Social Security Number

000-000-0000

First Name

Barbara

Last Name

Gordon

City

Gotham

State

IL

ZIP

Placeholder

Country

Placeholder

Phone extension

Placeholder

Notification User ID

Placeholder

Department

Hardware

Remarks

Placeholder

Delete

Close

Save

## Sales Agent Maintenance

### Search Criteria

Search by

Sales Agent ID  First Name  Last Name

#### Sales Agent ID

Search

Show Active Only

### Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Action :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	⋮
<input type="checkbox"/> 12346	Constantine	John	JCONST	⋮
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	⋮
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	⋮
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN	⋮
<input type="checkbox"/> 12345	Isley	Pamela	POISON	⋮
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA	⋮
<input type="checkbox"/> 12345	Kent	Clark	SUPER	⋮

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#### Sales Agent ID (required)

Placeholder

#### Notification User ID

Placeholder



#### Printed ID (required)

Placeholder

#### Department

Placeholder

Active

#### Social Security Number

000-000-0000

#### First Name

Placeholder

#### Remarks

Placeholder

#### Last Name

Placeholder

#### Address 1

Placeholder

#### Address 2

Placeholder

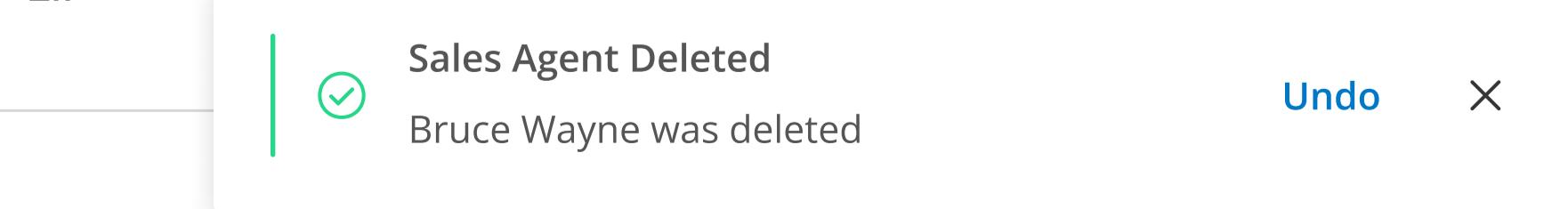
#### City

Placeholder

#### State

Placeholder

#### ZIP



Undo



Home X Data Files X Sales Agent Maintenance X

Data Files &gt; Sales Order Settings &gt; Sales Agent Maintenance

## Sales Agent Maintenance

+ Create Sales Agent

## Search Criteria

Search by

Sales Agent ID

Search for

12

Search

 Show Active Only

## Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	✓	Omaha
<input type="checkbox"/> 12346	Constantine	John	JCONST	✓	New York City
<input checked="" type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	✓	Gotham
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	✓	Gotham
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	✓	Gotham
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN		Gotham
<input type="checkbox"/> 12345	Isley	Pamela	POISON		Gotham
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA		Gotham

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Delete

Edit

## Sales Agent Maintenance

[+ Create Sales Agent](#)

## Search Criteria

Search by

Sales Agent ID

Search for

12

Search

 Show Active Only

## Search Results

⋮

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :	Edit
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	✓	Oma	Delete
<input type="checkbox"/> 12346	Constantine	John	JCONST	✓	New York City	
<input checked="" type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	✓	Gotham	
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	✓	Gotham	
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	✓	Gotham	
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN		Gotham	
<input type="checkbox"/> 12345	Isley	Pamela	POISON		Gotham	
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA		Gotham	
<input type="checkbox"/> 12345	Kent	Clark	SUPER	✓	Metropolis	
<input type="checkbox"/> 12345	Lane	Lois	LLANE	✓	Metropolis	

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## Sales Agent Maintenance

[+ Create Sales Agent](#)

## Search Criteria

Search by

Sales Agent ID

Search for

12

Search

 Show Active Only

## Search Results

[Delete](#) [Edit](#)

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	✓	Omaha
<input type="checkbox"/> 12346	Constantine	John	JCONST	✓	New York City
<input checked="" type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	✓	Gotham
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	✓	Gotham
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	✓	Gotham
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN		Gotham
<input type="checkbox"/> 12345	Isley	Pamela	POISON		Gotham
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA		Gotham
<input type="checkbox"/> 12345	Kent	Clark	SUPER	✓	Metropolis
<input type="checkbox"/> 12345	Lane	Lois	LLANE	✓	Metropolis

## Edit Sales Agent

Active

**Sales Agent ID** (*required*)

Placeholder

**Printed ID** (*required*)

Placeholder

**First Name**

Placeholder

**Last Name**

Placeholder

**Address 1**

Placeholder

**Address 2**

Placeholder

**City**

Placeholder

**State**

Placeholder

**ZIP**

Placeholder

**Country**

Placeholder



**Email**

hello@batman.com

**Delete**

**Continue**

## Sales Agent Maintenance

[+ Add Sales Agent](#)

## Search Criteria

Search by

Sales Agent ID

Search for

12

 Show Active Only[Search](#)

## Search Results

⋮

<input type="checkbox"/>	Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :	State :	Department :
	12345	Kopecky	Missie	MKOPEK	✓	Omaha	NE	Roofing
	12346	Constantine	John	JCONST	✓	New York City	NY	Siding
	12347	Wayne	Bruce	BWAYNE	✓	Gotham	IL	Hardware
	12348	Gordon	Barbara	BGORDO	✓	Gotham	IL	Lumber
	12345	Greyson	Richard	RGREY	✓	Gotham	IL	Siding
	12345	Quinzel	Harleen	HQUINN		Gotham	IL	Exterior Siding
	12345	Isley	Pamela	POISON		Gotham	IL	Roofing
	12345	Nigma	Edward	ENIGMA		Gotham	IL	Lumber
	12345	Kent	Clark	SUPER	✓	Metropolis	NY	Lumber
	12345	Lane	Lois	LLANE	✓	Metropolis	NY	Siding

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## Edit Sales Agent

Active

**Sales Agent ID** (*required*)

Placeholder

**Printed ID** (*required*)

Placeholder

**First Name**

Placeholder

**Last Name**

Placeholder

**Address 1**

Placeholder

**Address 2**

Placeholder

**City**

Placeholder

**State**

Placeholder

**ZIP**

Placeholder

**Country**

Placeholder



**Email**

hello@batman.com

**Delete**

**Continue**

## Sales Agent Maintenance

+ Add Sales Agent

## Search Criteria

Search by

Sales Agent ID

Search for

12

 Show Active Only

Search

## Search Results

⋮

<input type="checkbox"/>	Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :	State :	Department :	Delete
<input type="checkbox"/>	12345	Kopecky	Missie	MKOPEK	✓	Omaha	NE	Roofing	
<input type="checkbox"/>	12346	Constantine	John	JCONST	✓	New York City	NY	Siding	
<input type="checkbox"/>	12347	Wayne	Bruce	BWAYNE	✓	Gotham	IL	Hardware	
<input checked="" type="checkbox"/>	12348	Gordon	Barbara	BGORDO	✓	Gotham	IL	Lumber	
<input type="checkbox"/>	12345	Greyson	Richard	RGREY	✓	Gotham	IL	Siding	
<input type="checkbox"/>	12345	Quinzel	Harleen	HQUINN		Gotham	IL	Exterior Siding	
<input type="checkbox"/>	12345	Isley	Pamela	POISON		Gotham	IL	Roofing	
<input type="checkbox"/>	12345	Nigma	Edward	ENIGMA		Gotham	IL	Lumber	
<input type="checkbox"/>	12345	Kent	Clark	SUPER	✓	Metropolis	NY	Lumber	
<input type="checkbox"/>	12345	Lane	Lois	LLANE	✓	Metropolis	NY	Siding	

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Home X Data Files X Sales Agent Maintenance X

Data Files &gt; Sales Order Settings &gt; Sales Agent Maintenance &gt; Edit Sales Agent: Bruce Wayne

## Edit Sales Agent

Sales Agent ID (required)

Printed ID (required)

Last Name

Address 1

ZIP

Country

Department

Email

Social Security Number

 Active

First Name

Address 2

City

State

Phone extension

Notification User ID

Remarks

Close

Save

## Sales Agent Maintenance

+ Add Sales Agent

## Search Criteria

Search by

Sales Agent ID

Search for

12

 Show Active Only

Search

## Search Results

⋮

<input type="checkbox"/>	Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :	State :	Department :
	12345	Kopecky	Missie	MKOPEK	✓	Omaha	NE	Roofing
	12346	Constantine	John	JCONST	✓	New York City	NY	Siding
	12347	Wayne	Bruce	BWAYNE	✓	Gotham	IL	Hardware
	12348	Gordon	Barbara	BGORDO	✓	Gotham	IL	Lumber
	12345	Greyson	Richard	RGREY	✓	Gotham	IL	Siding
	12345	Quinzel	Harleen	HQUINN		Gotham	IL	Exterior Siding
	12345	Isley	Pamela	POISON		Gotham	IL	Roofing
	12345	Nigma	Edward	ENIGMA		Gotham	IL	Lumber
	12345	Kent	Clark	SUPER	✓	Metropolis	NY	Lumber
	12345	Lane	Lois	LLANE	✓	Metropolis	NY	Siding

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# Delete

## Sales Agent Maintenance

[+ Add Sales Agent](#)

## Search Criteria

Search by

Sales Agent ID

Search for

12

 Show Active Only

Search

## Search Results

⋮

<input type="checkbox"/>	Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :	State :	Department :
	12345	Kopecky	Missie	MKOPEK	✓	Omaha	NE	Roofing
	12346	Constantine	John	JCONST	✓	New York City	NY	Siding
	12347	Wayne	Bruce	BWAYNE	✓	Gotham	IL	Hardware
	12345	Greyson	Richard	RGREY	✓	Gotham	IL	Siding
	12345	Quinzel	Harleen	HQUINN		Gotham	IL	Exterior Siding
	12345	Isley	Pamela	POISON		Gotham	IL	Roofing
	12345	Nigma	Edward	ENIGMA		Gotham	IL	Lumber
	12345	Kent	Clark	SUPER	✓	Metropolis	NY	Lumber
	12345	Lane	Lois	LLANE	✓	Metropolis	NY	Siding
	12345	Kyle	Selena	CATLADY		Gotham	IL	Exterior Siding

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## Add Sales Agent



Active

**Sales Agent ID (required)**

**Printed ID (required)**

Placeholder

Placeholder

**First Name**

Placeholder

Placeholder

**Address 1**

Placeholder

**Address 2**

Placeholder

**City**

Placeholder

**State**

XX

**ZIP**

Placeholder

**Country**

XX



**Email**

Placeholder

**Phone extension**

Placeholder

**Notification User ID**

Placeholder



**Department**

Placeholder

**Remarks**

Placeholder

Cancel

Save

## Add Sales Agent



Active

**Sales Agent ID (required)**

100011

**Printed ID (required)**

BSMITH

**First Name**

Bill

**Last Name**

Smith

**Address 1**

3005 S 67th St

**Address 2**

Suite 44

**City**

Trenton

**State**

NJ

**ZIP**

07001

**Country**

USA



**Email**

bsmith@builders.com

**Phone extension**

902

**Notification User ID**

BSMITH



**Department**

Siding

**Remarks**

Bill has a good relationship with Trinity Supply from his previous job

Cancel

Save

## Sales Agent Maintenance

[+ Add Sales Agent](#)

## Search Criteria

Search by

Sales Agent ID

Search for

12

 Show Active Only[Search](#)

## Search Results

⋮

<input type="checkbox"/>	Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :	State :	Department :
	100011	Smith	Bill	BSMITH	✓	Trenton	NJ	Siding
	12346	Constantine	John	JCONST	✓	New York City	NY	Siding
	12347	Wayne	Bruce	BWAYNE	✓	Gotham	IL	Hardware
	12345	Greyson	Richard	RGREY	✓	Gotham	IL	Siding
	12345	Quinzel	Harleen	HQUINN		Gotham	IL	Exterior Siding
	12345	Isley	Pamela	POISON		Gotham	IL	Roofing
	12345	Nigma	Edward	ENIGMA		Gotham	IL	Lumber
	12345	Kent	Clark	SUPER	✓	Metropolis	NY	Lumber
	12345	Lane	Lois	LLANE	✓	Metropolis	NY	Siding
	12345	Kyle	Selena	CATLADY		Gotham	IL	Exterior Siding

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## Sales Agent Maintenance

[+ Add Sales Agent](#)

## Search Criteria

Search by

Sales Agent ID

Search for

12

 Show Active Only[Search](#)

## Search Results

⋮

<input type="checkbox"/>	Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :	State :	Department :
	100011	Smith	Bill	BSMITH	✓	Trenton	NJ	Siding
	12346	Constantine	John	JCONST	✓	New York City	NY	Roofing
	12347	Wayne	Bruce	BWAYNE	✓	Gotham	IL	Hardware
	12345	Greyson	Richard	RGREY	✓	Gotham	IL	Siding
	12345	Quinzel	Harleen	HQUINN		Gotham	IL	Exterior Siding
	12345	Isley	Pamela	POISON		Gotham	IL	Roofing
	12345	Nigma	Edward	ENIGMA		Gotham	IL	Lumber
	12345	Kent	Clark	SUPER	✓	Metropolis	NY	Lumber
	12345	Lane	Lois	LLANE	✓	Metropolis	NY	Siding
	12345	Kyle	Selena	CATLADY		Gotham	IL	Exterior Siding

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Home X Data Files X Sales Agent Maintenance X

Data Files &gt; Sales Order Settings &gt; Sales Agent Maintenance

## Sales Agent Maintenance

+ Create Sales Agent

## Search Criteria

Search by

Sales Agent ID

Search for

12

 Show Active Only

Search

## Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	✓	Omaha
<input type="checkbox"/> 12346	Constantine	John	JCONST	✓	New York City
<input type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	✓	Gotham
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	✓	Gotham
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	✓	Gotham
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN		Gotham
<input type="checkbox"/> 12345	Isley	Pamela	POISON		Gotham
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA		Gotham

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Home X Data Files X Sales Agent Maintenance X

Data Files &gt; Sales Order Settings &gt; Sales Agent Maintenance

## Sales Agent Maintenance

+ Create Sales Agent

## Search Criteria

Search by

Sales Agent ID

Search for

12

Search

## Search Results

 Show Active Only

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Active :	City :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	✓	Omaha
<input type="checkbox"/> 12346	Constantine	John	JCONST	✓	New York City
<input type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	✓	Gotham
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	✓	Gotham
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	✓	Gotham
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN		Gotham
<input type="checkbox"/> 12345	Isley	Pamela	POISON		Gotham
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA		Gotham

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## Add Sales Agent



Sales Agent ID (required)

Placeholder

Address 2

Placeholder

Notification User ID

Placeholder

Printed ID (required)

Placeholder

City

Placeholder

State

Placeholder

Department

Placeholder

Active

First Name

Placeholder

ZIP

Placeholder

Country

Placeholder

Remarks

Placeholder

Last Name

Placeholder

Email

hello@batman.com

Address 1

Placeholder

Phone extension

Placeholder

Cancel

Save

## Sales Agent Maintenance

### Search Criteria

Search by

Sales Agent ID  First Name  Last Name

#### Sales Agent ID

Search

Show Active Only

### Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Action :
<input type="checkbox"/> 007	Bond	James	DOUBLEO	
<input type="checkbox"/> 12346	Constantine	John	JCONST	
<input type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN	
<input type="checkbox"/> 12345	Isley	Pamela	POISON	
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA	

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ZIP

Sales Agent ID (required)

Placeholder

Notification User ID

Placeholder



Printed ID (required)

Placeholder

Department

Placeholder

Active

First Name

Placeholder

Social Security Number

000-000-0000

Last Name

Placeholder

Remarks

Placeholder

Address 1

Placeholder

Address 2

Placeholder

City

Placeholder

State

Placeholder



Sales Agent Created

Agent James Bond was created

Undo



## Add Sales Agent



Active

**Sales Agent ID (required)**

**Printed ID (required)**

**First Name**

Placeholder

**Last Name**

Placeholder

**Address 1**

Placeholder

**Address 2**

Placeholder

**City**

Placeholder

**State**

Placeholder

**ZIP**

Placeholder

**Country**

Placeholder



**Email**

hello@batman.com

**Phone extension**

Placeholder

**Notification User ID**

Placeholder



**Department**

Placeholder

**Social Security Number**

.....

**Remarks**

Placeholder

Cancel

Save

## Add Sales Agent



Active

**Sales Agent ID (required)**

Placeholder

**Printed ID (required)**

Placeholder

**First Name**

Placeholder

**Last Name**

Placeholder

**Address 1**

Placeholder

**Address 2**

Placeholder

**City**

Placeholder

**State**

XX

**ZIP**

Placeholder

**Country**

XX



**Email**

Placeholder

**Phone extension**

Placeholder

**Notification User ID**

Placeholder



**Department**

Placeholder

**Social Security Number**

.....

**Remarks**

Placeholder

Cancel

Save

## Add Sales Agent



Active

**Sales Agent ID (required)**

**Printed ID (required)**

Placeholder

Placeholder

**First Name**

Placeholder

**Last Name**

Placeholder

**Address 1**

Placeholder

**Address 2**

Placeholder

**City**

Placeholder

**State**

XX

**ZIP**

Placeholder

**Country**

XX



**Email**

Placeholder

**Phone extension**

Placeholder

**Notification User ID**

Placeholder



**Department**

Placeholder

**Remarks**

Placeholder

Cancel

Save

## Add Sales Agent



Active

**Sales Agent ID (required)**

**Printed ID (required)**

Placeholder

Placeholder

**First Name**

Placeholder

**Last Name**

Placeholder

**Address 1**

Placeholder

**Address 2**

Placeholder

**City**

Placeholder

**State**

XX

**Email**

Placeholder

**ZIP**

Placeholder

**Country**

XX



**Phone extension**

Placeholder

**Notification User ID**

Placeholder



**Department**

Placeholder

**Remarks**

Placeholder

Cancel

Save

## Edit Sales Agent



Active

Sales Agent ID (*required*)

12346

Printed ID (*required*)

JCONST

First Name

John

Last Name

Constantine

Address 1

Address 2

City

New York City

State

NY

ZIP

10002

Country

USA



Email

jconstantine@builders.com

Phone extension

999

Notification User ID

jconst



Department

Siding

Remarks

Cancel

Save

## Edit Sales Agent



Active

Sales Agent ID (*required*)

12346

Printed ID (*required*)

JCONST

First Name

John

Last Name

Constantine

Address 1

Address 2

City

New York City

State

NY

ZIP

10002

Country

USA



Email

jconstantine@builders.com

Phone extension

999

Notification User ID

jconst



Department

Roofing

Remarks

Cancel

Save

## Sales Agent Maintenance

### Search Criteria

Search by

Sales Agent ID  First Name  Last Name

#### Sales Agent ID

Search

Show Active Only

### Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Action :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	
<input type="checkbox"/> 12346	Constantine	John	JCONST	
<input checked="" type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN	
<input type="checkbox"/> 12345	Isley	Pamela	POISON	
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA	

Per page

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Page

Sales Agent ID (required)

12347

Notification User ID

Placeholder



Printed ID (required)

BATMAN

Department

Hardware

Active

Social Security Number

.....

First Name

Bruce

Remarks

Placeholder

Last Name

Wayne

Address 1

Placeholder

Address 2

Placeholder

City

Gotham

State

IL

ZIP

Country

Download

Download

Delete

Save

## Sales Agent Maintenance

### Search Criteria

Search by

Sales Agent ID  First Name  Last Name

#### Sales Agent ID

Search

Show Active Only

### Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Action :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	
<input type="checkbox"/> 12346	Constantine	John	JCONST	
<input checked="" type="checkbox"/> 12347	Wayne	Bruce	BATMAN	
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN	
<input type="checkbox"/> 12345	Isley	Pamela	POISON	
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA	

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1



Sales Agent ID (required)

12347

Notification User ID

Placeholder



Printed ID (required)

BATMAN

Department

Hardware

Active

Social Security Number

.....

First Name

Bruce

Remarks

Placeholder

Last Name

Wayne

Address 1

Placeholder

Address 2

Placeholder

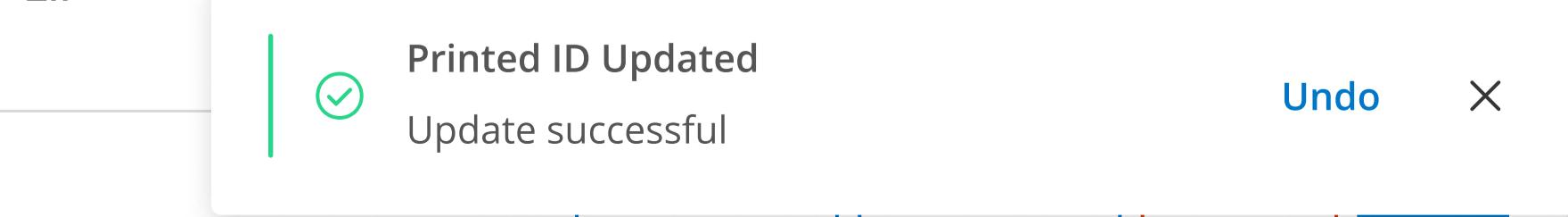
City

Gotham

State

IL

ZIP



Undo



## Sales Agent Maintenance

### Search Criteria

Search by

Sales Agent ID  First Name  Last Name

#### Sales Agent ID

Search

Show Active Only

### Search Results

<input type="checkbox"/> Sales Agent ID :	Last Name :	First Name :	Printed ID :	Action :
<input type="checkbox"/> 12345	Kopecky	Missie	MKOPEK	
<input type="checkbox"/> 12346	Constantine	John	JCONST	
<input type="checkbox"/> 12347	Wayne	Bruce	BWAYNE	
<input type="checkbox"/> 12348	Gordon	Barbara	BGORDO	
<input type="checkbox"/> 12345	Greyson	Richard	RGREY	
<input type="checkbox"/> 12345	Quinn	Harleen	HQUINN	
<input type="checkbox"/> 12345	Isley	Pamela	POISON	
<input type="checkbox"/> 12345	Nigma	Edward	ENIGMA	

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Page

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Sales Agent ID (required)

007

Notification User ID

Placeholder



Printed ID (required)

DOUBLEO

Department

Placeholder

Active

Social Security Number

000-000-0000

First Name

James

Remarks

Placeholder

Last Name

Bond

Address 1

Placeholder

Address 2

Placeholder

City

Placeholder

State

Placeholder

ZIP

Country

Home

Nevada Jones, Inc - Henderson

Customers &gt; Customer: Nevada Jones, Inc - Henderson: Quotes/Orders- Item Order History

Customer Info

Credit Profile

Quotes/Orders

Quotes

Sales Orders

Item Order History

Invoices

Payments

Doc Storage

NVj001 • Ship-to Seq #1

## Customer: Nevada Jones, Inc - Henderson

546 2nd Ave, Henderson NV, 89002

(555) 402 - 9117 • sales@NVjones.com

Primary Contact: Brian Wilson

(555) 402 - 9117 • bwilson@NVjones.com

Sales Agent: Sarah Smith

### Item Order History

Search by

 Item  Product Group  SO ID

Major From

To

Minor From

To

00

06

All

All

Since

01/25/23

 Include credit memos Include group items

Search

### Search Results

 Show costs Show detail view

Add to New Quote

Add to New Sales Order

<input type="checkbox"/>	Invoiced Date :	Tran ID :	Item :	Discount :	Dimension :	Shipment # :	Invoiced Qty :	Qty UOM :	Action :
<input type="checkbox"/>	06/22/22	373	KP-Item-1			1	0.5000	EA	
<input type="checkbox"/>	06/22/22	371	KP-Item-SL		1X6X08	1	3.0000	BF	
<input type="checkbox"/>	06/22/22	363	KP-Item-3	10.00%		1	15.0000	EA	
<input type="checkbox"/>	06/22/22	355	KP-Item-1			1	10.0000	EA	
<input type="checkbox"/>	06/22/22	355	KP-Item-3			1	5.0000	EA	
<input type="checkbox"/>	06/22/22	351	Item-SG		36"X96"	1	1.0000	SF	

Home

Customers X

Customers

## Customers

## Search Criteria

Customer ID

Search customers

Level to View

Sold-to

Seq #

Search

## Search Results

⋮

Customer ID : Customer Name : Address 1 : Address 2 : City : State :

No Results

To view results, first enter your desired search criteria and  
click 'Search.'

Roles per page

25 ▾

1-25 of 47 roles

Page

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