# Setting Up and Using Salesperson Records

A salesperson record includes information related to the individual salesperson, such as name, salesperson code, and territory.

It allows the management to credit the salesperson for the sales they make and track revenue generated by each salesperson.

The management uses the salesperson record to identify learning or performance improvement opportunities.

## Objectives

- Adding a Salesperson Record
- Editing a Salesperson Record
- Adding a Salesperson to a Customer Record
- Assigning Salespersons to POS Transactions

## Adding a Salesperson Record

Adding salesperson records helps the management keep track of their sales performance and allows them to credit the salesperson for their sales. Follow these steps to add salesperson records.

Follow the onscreen prompts to add a salesperson record. Select NEXT to begin the simulation.
Navigate the menu path to add a salesperson record. Under Main Menu > Customers > Setup > choose Salesperson.

Select the Add icon to add a salesperson record. A salesperson code is a unique code with letters and numbers given to a salesperson. Select the Code field. Enter AR101 in the Code field and press Enter.

Select the Name field. Enter the name as John Roe and press Enter. If a salesperson has an assigned territory, you can select it in the Sales Territory field. Select the Sales Territory field. Enter Seattle in the Sales Territory field and press Enter.

You can switch on the Assign Salesperson to Users/Clerks toggle to one or more Users and POS clerk. Select the Select Users/Clerks field. Type John in the Select Users/Clerks field and press Enter. Select John Doe from the results.

Here, you can switch on the Active toggle to enable the salesperson record. Select the Save icon to save your changes.

Good work adding the salesperson record! Select NEXT to continue to the next topic.

## Editing a Salesperson Record

If you want to edit, delete, and export the salesperson records, follow the steps to make the changes. Follow the onscreen prompts to edit a salesperson record. Select NEXT to begin the simulation.

Navigate the menu path to edit a salesperson record. Under Main Menu > Customers > Setup > choose Salesperson.

Here, you can see all the existing salesperson records. You can use the search function to find a particular salesperson record. Select the search field. Enter the name as John Roe and press Enter. Then select SEARCH.

Enable the checkbox next to the salesperson record you want to edit. Select the Edit icon. Make the necessary changes in the Salesperson page. For this example, let us add a Clerk in the Select Users/Clerks dropdown. Select the Select Users/Clerks field. Type John in the Select Users/Clerks field and press Enter.
Select John from the results. Select the Save icon to save your changes.

To export the salesperson record details to an Excel file, first enable the checkbox next to the salesperson record. Then select the Export to Excel icon. You will download the details in an Excel file.

To delete a salesperson record, enable the checkbox next to the salesperson record you want to delete. Select the Edit icon. Open the Actions dropdown menu. Choose Delete Salesperson to remove the salesperson record. Select YES in the confirmation window.

Nice work, you have successfully edited the salesperson record. Select NEXT to continue to the next topic.

## Adding a Salesperson to a Customer Record

Give salespersons who regularly work with specific customers credit for their sales by assigning them to the customer.

Follow the onscreen prompts to add a salesperson to a customer record. Select NEXT to begin the simulation.

Navigate the menu path to add a salesperson record. Under Main Menu > Customers > choose Customers.

Here you can see all the existing customers. You can use the filters to search for a particular customer. Select the search field. Enter the name as Jane Doe. Then select SEARCH.

Enable the checkbox next to the Jane Doe record. Select the Edit icon. Open the Salesperson dropdown. Choose John Roe from the dropdown results. Select the Save icon to save your changes.

Good work adding a salesperson to the customer record! Select NEXT to continue to the next topic.

## Assigning Salespersons to POS Transactions

By assigning salesperson to POS transactions, they get credit for their sales

Follow the onscreen prompts to assign a salesperson to a POS transaction. Select NEXT to begin the simulation.

Navigate the menu path to add a salesperson record. Under Main Menu > Sales > choose POS.

Select the customer search field. Enter Jane Doe in the search field and press Enter. Choose Jane Doe from the dropdown results. Select the Customer icon on the right-side panel. Open the Salesperson dropdown. Select John Roe from the dropdown results. You can now continue with your transaction as usual.

Nice work, you have successfully assigned a salesperson to a POS transaction. Select NEXT to continue to the next topic.

## Recap

With some initial setup, the salesperson record helps the management to credit the salesperson for the sales they make, and track revenue generated by each salesperson.

## About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

EPICOR

**Corporate Office**
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

**Latin America and Caribbean**
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

**Europe, Middle East and Africa**
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

**Asia**
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

**Australia and New Zealand**
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298