Sales

Module Guide: Sales (Salesman List)

Module Location

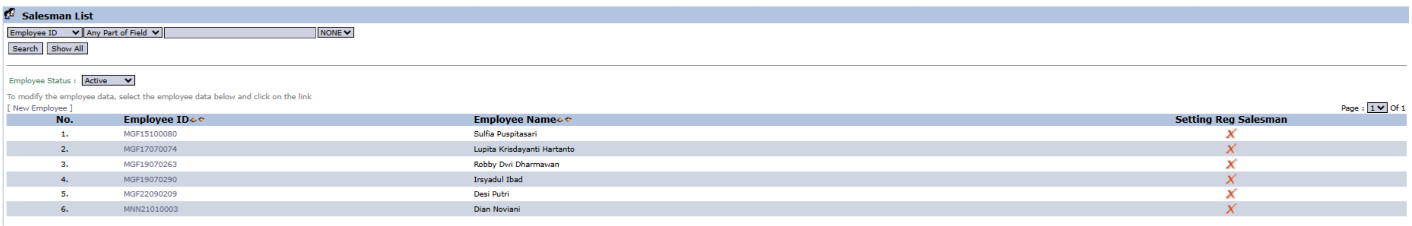
Sales > Customer > Sales

Module Objective

The **Sales (Salesman List)** module serves as the master data hub for managing all salespeople in the company. The list created and managed here will be used throughout all other modules (such as CRM and Sales) to assign the person responsible for customers, sales opportunities, and transactions.

1. Main View (Salesman List)

The main page of this module displays a list of all employees who have been designated as salesmen.


Salesman List

Employee ID | Any Part of Field | NONE

Search | Show All

Employee Status : Active

To modify the employee data, select the employee data below and click on the link

[New Employee]

Page : 1 Of 1

No.	Employee ID	Employee Name	Setting Reg Salesman
1.	MGF15100080	Sulfia Puspitasari	X
2.	MGF17070074	Lupita Krisdayanti Hartanto	X
3.	MGF19070263	Robby Dwi Dharmawan	X
4.	MGF19070290	Irsyadul Ibad	X
5.	MGF22090209	Desi Putri	X
6.	MNN21010003	Dian Noviani	X

View Explanation & Filters

This page is for viewing and managing all salesman data.

- **Filter**: You can search for a specific salesman using the search bar based on **Employee ID** or filter the list by **Employee Status** (for example, to only display those who are "Active").

- **Salesman List**: The table below displays all salesmen that match the filters.

Column Explanation

- **Employee ID**: The Employee ID Number of the salesman.

- **Employee Name**: The full name of the salesman.

- **Setting Reg Salesman**: This column likely indicates the status of advanced settings for the salesman. A red cross icon (X) could mean that other settings (such as region or target settings) have not yet been completed.

Button/Link Functions

- **New Employee**: A link to add a new employee to the salesman list.

2. Steps to Add a New Salesman

Step 1: Open the Entry Form

From the Main View, click the **New Employee** link to open the **Salesman | Add** form. 

Step 2: Fill in Employee and Access Details

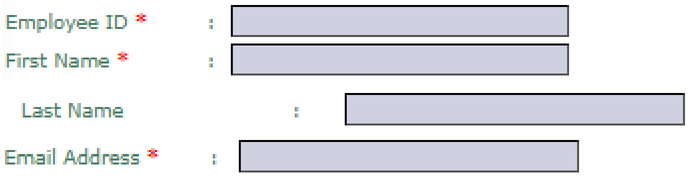
On the **Salesman | Add** form, fill in all the necessary information. Fields marked with `*` are mandatory.

- **Login Information:**

  - **User Name**: The username for logging into the system.

- **Status**: Select the user status, **Active** or **In Active**.

- **Personal Data:**
  - **Employee ID, First Name, Last Name, Gender, Email Address**, and other personal data.



- **Employment Information:**
  - **Employee Status**: The employment status, for example, "Permanent".

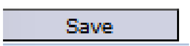
  - **Hire Date** and **Effective Date**.

- **Sales Settings (Important):**
  - **Is Person Sales**: Ensure you set this field to **'Yes'**. This is the key setting that marks this employee as a salesman.

  - **Leader Name**: Assign the superior or leader of the salesman.

Step 3: Save the Data

After all data has been filled in correctly, click the **Save** button in the bottom-left section to save the new salesman data.



Tips & Important Notes

- The salesman data set up here will appear as the choices for **"Account Officer"** or **"Sales Person"** in other modules like CRM Opportunity and Sales Order.
- Ensure you always keep the **Employee Status** up-to-date to prevent them from being incorrectly selected in transactions.

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