



Sales Person Search

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Overview

Sales Person Search is a CRM module within SalesPad Desktop that allows users to search through their own Sales People. In this document, you will learn how to access Sales Person Search and how to use the search function, as well as how to add a Sales Person. Any relevant securities will be listed at the end of document.

Sales Person Search

To open the Sales Person Search module, select Sales Person Search from the CRM tab.



Usage

To perform a search for all of your Sales People, click the **Search** button at the top of the module. In the Search Options, you can select whether or not this search will go through inactive sales people as well. If you would like to limit the search to just one person, you can fill out the Sales Person field to search for their name.



Add Sales Person

To add a Sales Person from within Sales Person Search, click the **Add Sales Person** button. This will open up a blank Sales Person Card that you can modify and save. For more information on the Sales Person Card, see the Sales Person Card documentation.



Security and Application Settings

Sales Person Search - Allows the user to view and use Sales Person Search.

*Sales Person Card** - Allows the user to add a new user from Sales Person Search.

Note: Securities with an asterisk (such as *Dispatch Route Entry*) have sub-securities that are listed in the middle section of the Security field. Sub-security descriptions appear in the bottom section of the field. Review and customize these as desired.