# Sales Person Search

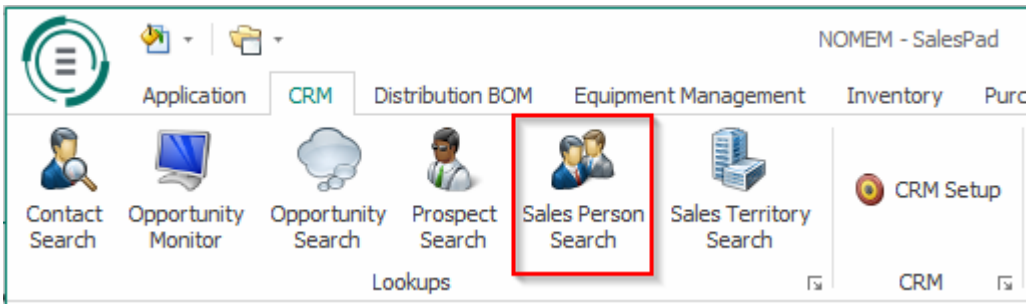
Cavallo Support - 2024-11-22 - CRM

**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.

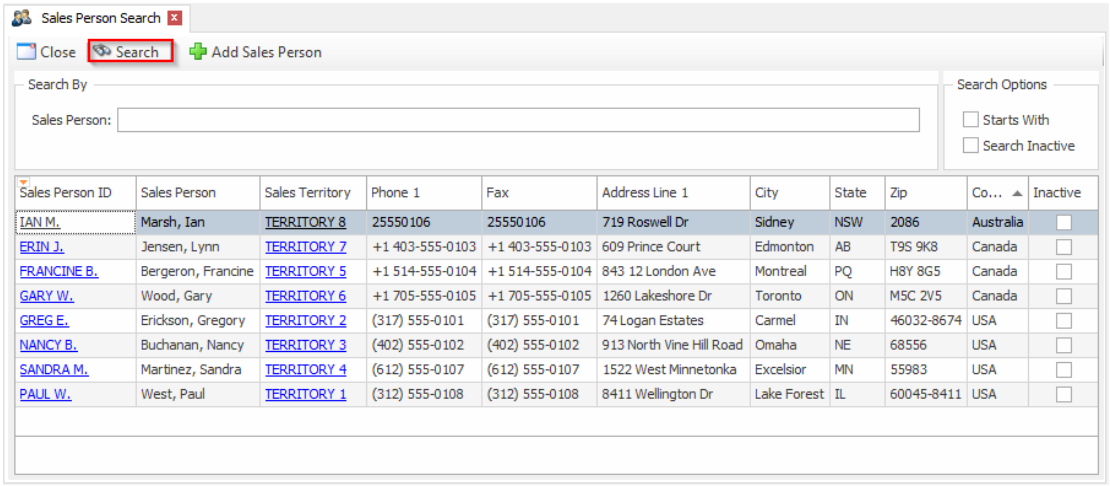
**Sales Person Search**

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




**Usage**

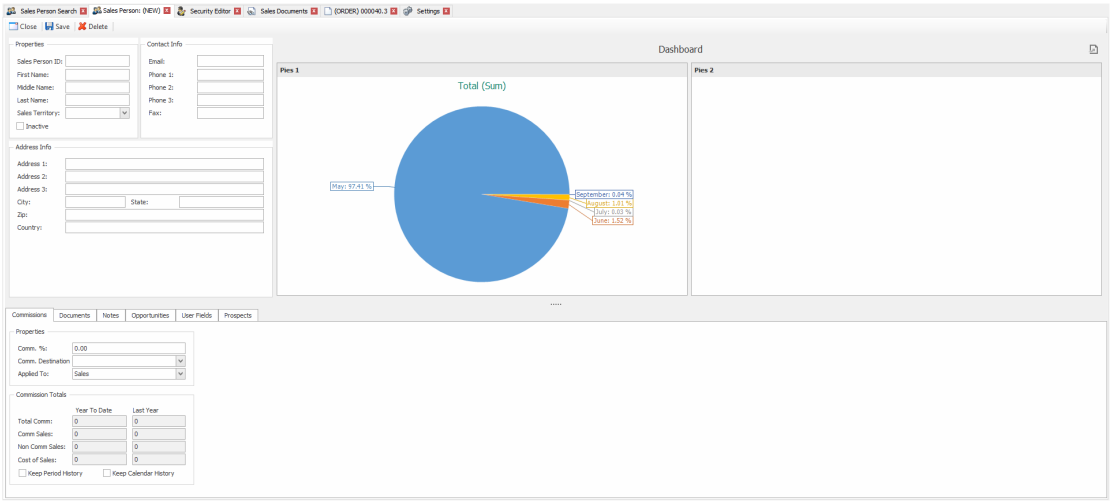
To perform a search for all of your Sales People, click the **Search** button at the top of the module. In the Search Options, you can select whether or not this search will go through inactive sales people as well. If you would like to limit the search to just one person, you can fill out the Sales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




| Sales Person ID | Sales Person | Sales Territory | Phone 1 | Fax | Address Line 1 | City | State | Zip | Co... | Inactive |
|---|---|---|---|---|---|---|---|---|---|---|
| IAN M. | Marsh, Ian | TERRITORY 8 | 25550106 | 25550106 | 719 Roswell Dr | Sidney | NSW | 2086 | Australia | |
| ERIN J. | Jensen, Lynn | TERRITORY 7 | +1 403-555-0103 | +1 403-555-0103 | 609 Prince Court | Edmonton | AB | T9S 9K8 | Canada | |
| FRANCINE B. | Bergeron, Francine | TERRITORY 5 | +1 514-555-0104 | +1 514-555-0104 | 843 12 London Ave | Montreal | PQ | H8Y 8G5 | Canada | |
| GARY W. | Wood, Gary | TERRITORY 6 | +1 705-555-0105 | +1 705-555-0105 | 1260 Lakeshore Dr | Toronto | ON | M5C 2V5 | Canada | |
| GREG E. | Erickson, Gregory | TERRITORY 2 | (317) 555-0101 | (317) 555-0101 | 74 Logan Estates | Carmel | IN | 46032-8674 | USA | |
| NANCY B. | Buchanan, Nancy | TERRITORY 3 | (402) 555-0102 | (402) 555-0102 | 913 North Vine Hill Road | Omaha | NE | 68556 | USA | |
| SANDRA M. | Martinez, Sandra | TERRITORY 4 | (612) 555-0107 | (612) 555-0107 | 1522 West Minnetonka | Excelsior | MN | 55983 | USA | |
| PAUL W. | West, Paul | TERRITORY 1 | (312) 555-0108 | (312) 555-0108 | 8411 Wellington Dr | Lake Forest | IL | 60045-8411 | USA | |

**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.