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Sales Person Search

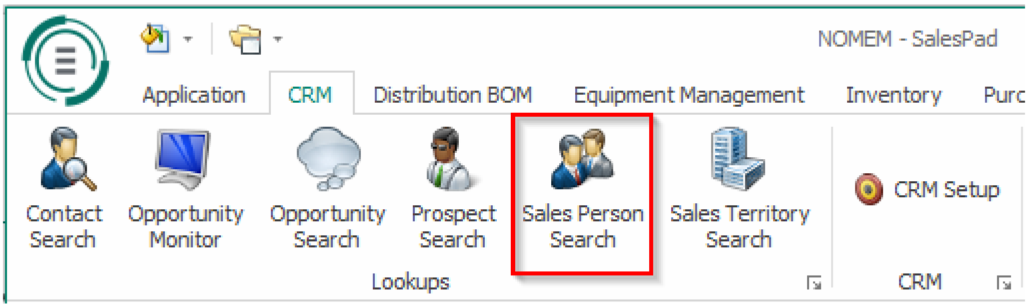
Megan De Freitas - 2024-11-22 - [CRM](#)

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.

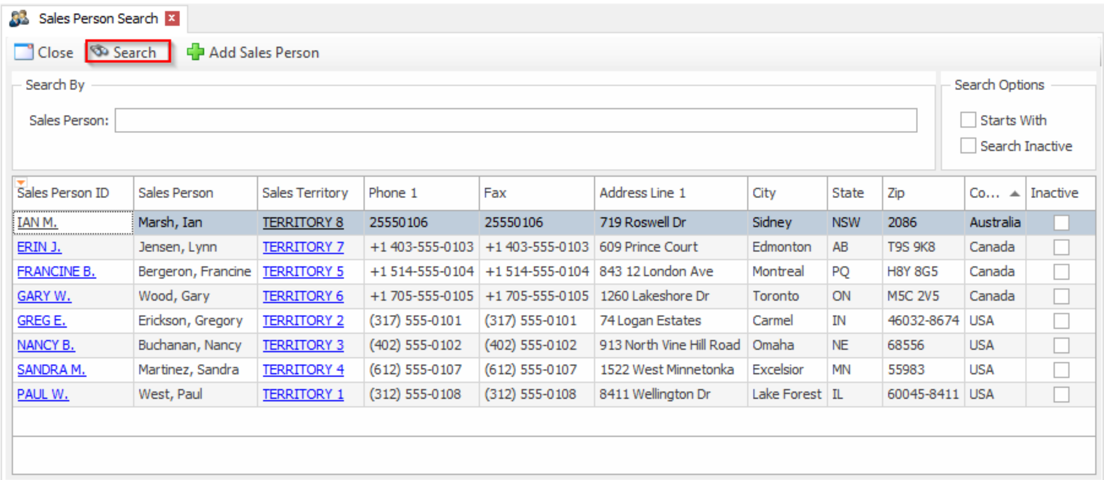
Sales Person Search

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



Usage

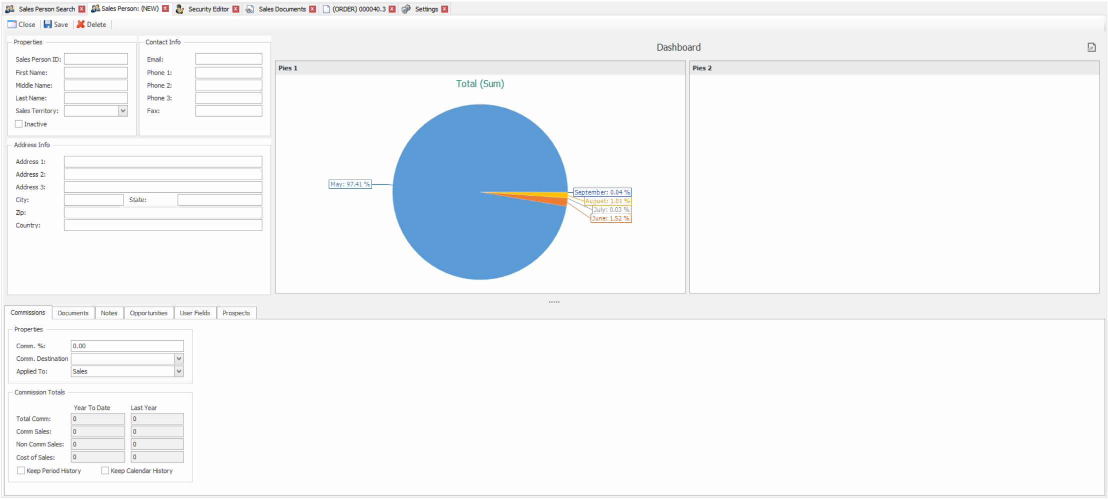
To perform a search for all of your Sales People, click the **Search** button at the top of the module. In the Search Options, you can select whether or not this search will go through inactive sales people as well. If you would like to limit the search to just one person, you can fill out the Sales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