

strategy *Live!*

Totally Internet Based Software

Agent Entry

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Adding Agents

Go to Administration > File Maintenance > Agents to add a new agent to the system. A list of all of the system's current agents will be displayed. Click the create button at the top of the list to enter a new agent.

Agent Information Tab

The Agent Information tab contains the contact information for the agent.

The screenshot shows the 'Agent Information' tab in a web browser window titled 'Agent Editing - Windows Internet Explorer'. The form contains the following fields:

Number	TRAVIS	Status	Available
Name	Travis Williams	Agent Type	Company Agent
Street	1234 Nantucket Ave	Company #	
Street 2			
City	Bentonville	State	AR
Phone	479-271-XXXX	Zip	72712
		Fax	479-271-XXXX
Comments			

Buttons: Save, Cancel

Settlement Information Tab

The Settlement Information tab contains the tax information and the rate calculation information for the agent.

The screenshot shows the 'Settlement Information' tab in a web browser window titled 'Agent Editing - Windows Internet Explorer'. The form contains the following fields:

Number	TRAVIS	Payroll Hold Flag	No
Federal ID-#/SSN			
A/P Information			
Name For 1099		1099?	No
		Days To Pay	30
Settlements			
	Rate	Charge Type	
Sales	5.000	Percent of Profit	
Booking	5.000	Percent of Profit	
Dispatch	5.000	Percent of Profit	

Buttons: Save, Cancel