Adminware[™] for ISP — Agents

Introduction

The Agents module is used to record detailed information about each agent that you have contact with.

In order to assign an agent to a student (on the Student screen), the agent must first exist in the agent module.

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Procedure

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- ① open the Agents module. This can be either from the Main Switchboard of via the Toolbar.
 - * Agents module button from Main Switchboard: Agents
 - * Agents icon on Toolbar: 🚱
- 2 add a new record. There are three options:
 - * click the New record button at the bottom left of the screen:
 - * click the New record icon on the Toolbar: **>***
 - * select **Insert** | **New Record** from the pull-down menu.
- ③ fill in the appropriate data in the desired fields. See page 5 for a list of fields and relevant data.

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Agents screen

The list of students shown in the Student list on the bottom part of the screen is based on the current school year only and is based on "up-to-the-minute" data. It cannot be modified on this screen; you must move to the student module to add or edit this information.

Double-clicking on the **Stdld** field will move you to the selected entry in the student module.

Buttons

The various buttons found on the Agents form.

<u>S</u>ave <u>S</u>ave

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The **Save** button becomes "enabled" when the current entry has being modified. That is, as soon as a change is made to any of the specific Agent fields, the Save button will enable and be clickable.

Clicking the Save button will Save any changes.

If you move from one agent entry to another, the data is automatically saved, regardless of whether you have clicked the Save button.

<u>R</u>eport

The **<u>Report</u>** button will open the Agents Report form. See page 9 for full details.

Any data for the current agent is automatically saved when the Report button is selected.

No Edit <u>E</u>dit

Editing! Stop <u>E</u>dit When you first open the Agents module, the default setting for making changes to the data is "No editing", for safety purposes. That is, you must click the Edit button in order to make modifications to the current entry.

Once the Edit button has been clicked, the Editing mode remains 'on' until you stop editing.

When adding a new agent record, this button has no effect.

Envelope $_{\pm}$

The **Envelope** <u>.</u> button is used to generate a standard size 10 envelope for the current agent.

This will preview the address on the screen.

Beatrice Lyra GIVE GmbH In der Neckarhelle 127a Heidelberg, 69118 Germany

Jump/Find

In order to modify a specific agent's data, the agent must be displayed on the screen.

Jump (find)

Use the <u>J</u> ump (fir	d) button	to select	and move	to the	desired	agent
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	<u>G</u> o To	⊆lose			Sort Company
Find Company Las	st name	First name	Country	<u>Filter</u>	C Agent name
election	-				
Company	LastName	FirstName	City	Country	AgentId 🔺
O'let Canada	Oullette	Dean	Goyang-city, Gyun	South Korea	9
Onnuri Emigration Corp	Park	Juah	Seoul	South Korea	117
Open Door InternationalE.V.	Bohm-Laubhold	Ingrid	Koln	Germany	86
Drbis Turismo Ltda.	Downer	Noel	Goiania-Go	Brazil	108
ORBIT CONSULTANT CO., LT	CHEN	NICOLE	Taipei	Taiwan	124
Overseas Ed. Inc.	Troes	Rosa Maria	Vancouver	Canada	173 -
Penprapa Advisory Study Abi	Vudhivate	Penprapa	Nonthaburi, Nontha	Thailand	134
Persona Grata (PG)	Gryshina	Alena	Mosow	Russia	121
Petra Jude			Bad Neuenahr-Ahrı	Germany	101
Power Education	Kim	Hyeyoung	Seoul	South Korea	159
Prolink Overseas Studies Con	Leung	Daniel	Kwun Tong Kowlooi	Hong Kong	175
Quoc Anh International Educ-	Trung	Phan Quang	Hanoi	Vietnam	131
Red Leaf S.L.	Castillo	Ruben	Madrid	Spain	136
Red River Study	Wang	Chun-Hsiao (Darren)	Taipei	Taiwan	73 🗸

Click on the company to select it, then press the **<u>Go</u>To** ... **<u>GoTo GIVE GmbH</u>** button to move to the selected company.

Filter:

Find				<u>F</u> ilter
Company	Last name	First name	Country	
				•

Enter sample data that you wish to find in either the **Company, Last name, First name or Country** criteria fields and **Filter**. A selected list of agents matching the criteria will be displayed.

Company name filter:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z	all
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Click on the first letter of the company name you wish to find along the bottom of the dialog box. Only those agents starting with the selected letter will be displayed.

Agent Fields

	Agent Id	The Agent Id is automatically assigned by <i>Adminware</i> TM , in numerical Agent Id 25 sequential order. This number cannot be modified.
		This number is used by Adminware to relate data from the various other tables.
(Company	The full company name of the agent. Company GIVE GmbH
F	irst name	Enter the agent's first name. First name Beatrice
Ι	Last name	Enter the agent's last name.
	Status	Define the current status of this agent. This is useful to group and organize your agents.
		You are limited to selecting an item from this list. The three choices are:
		Current Active Past
		Current and Active are essentially the same thing; you can decide which word best describes your needs.
Address	Address1	Enter the address for this agent. Address1 27 Nguyen Trung Truc, 2nd Floor
	Address2	Enter a second line of an address, if required. Address2 Centro Empresarial Itaigara
	City	Enter the city for this agent. City Salvador Bahai
	Prov	This is a user-defined field that displays a list of allowable values in a drop-down list. You are limited to selecting an item from this list.
		If you require a new province/state that is not showing in the current list of allowable values, you will need to <i>add</i> a new province/state to the list via the Look-up Tables module.
	Zip	The zip code for this agent. Zip 04001-003
		Lowercase letters are converted to uppercase when you leave the

field. In addition, if exactly 6 characters are entered, a space is automatically inserted into the middle.

Country The country for this agent.

This is a user-defined field that displays a list of allowable

values in a drop-down list. You are limited to selecting an item from this list.

If you require a new country that is not showing in the current list of allowable values, you will need to *add* a new country to the list via the Look-up Tables module.

Phone The phone number for this agent.

If exactly 7 digits are entered into the phone number, a dash will automatically be inserted when you leave the field.

Cell The cell number for this agent.

If exactly 7 digits are entered into the fax number, a dash will automatically be inserted when you leave the field.

Phone	011-7495 730 2082
Cell	
Fax	011-7-495-253-9017
Email	irina@parta.org
Website	http://www.parta.org

Brazil

-

Country

Fax The fax number for this agent.

If exactly 7 digits are entered into the fax number, a dash will automatically be inserted when you leave the field.

Email The general contact e-mail address for this agent.

As you exit this field, a check is made to ensure the validity of the information that was entered. For example, every e-mail address must have the @ symbol.

Website The website for this agent.

Invoicing

SINThe agent's Social Insurance Number.GST registration #The GST registration # for this agent.

SIN
GST registration #
Commission 15 💽 View

Commission The default value for commission. Four default values are provided in the drop-down list but you can enter any value you require.

Employees

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List the individual employees working at this agency.

As you add a new entry, you must assign the EmpNo. A sequential value is suggested, but you can skip numbers if desired. Each EmpNo must be unique for this agency.

(You can have an EmpNo = 1 for this agency and a number 1 for another agency, but you cannot have two number 1's for the same agency)

ISP Students (2010-2011)	E <u>m</u> ployees	Contacts	Notes	Commissions (from student fees) in 2010-2011

E	mpNo	LastName	FirstName	Position	Address1	Address2	City	Prov	Zi
	1 3			Commercial supervis		Sao Paulo			
	2 \$		1.1.1	Director of Operation	apps, docs. Hs, flight:	EXISTING STUDENTS			
	3	George		Produce Manager	Fairs,trainings orienta				
	5 (1.1	TO MAIN EMAIL ABO	SPECIFIC PERSON				
	8		1999		Campinas				
	9								
	10 (H-sex.							
*									
Reco	ord: 🚺	€ 1 ▶	▶ ▶ ▶ * of 7	•					Þ

Figure 31



Contacts

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If desired you can make a notation of each contact you had with this agency. This would be useful to provide a history of contacts, particularly in a multi-person office where several of your staff may be dealing with the same agency.

ISE	Students (2010	2011) Employees Contac	ots <u>N</u> otes <u>C</u> ommissions (f	irom student l	iees) in 2010-2011	
_						-
	CDate	ContactForm	Reason	Stdld	Notes	
	05-May-10	E-mail received	First contact			
3	÷					
			-6.4			1
11	ecora: 14 4		OF 1			



Agent | Contacts

The **ContactForm** and **Reason** fields are user-defined field that displays a list of allowable values in a drop-down list. You are limited to selecting an item from this list.

If you require a new entry that is not showing in the current list of allowable values, you will need to *add* the new entry to the list via the Look-up Tables module.

Notes

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A single, "memo"-type field allows you to enter as much free-form information as you desire about this agency.

ISP Students (2010-2011) Employees Contacts Notes Commissions (from student fees) in 2010-2011	
Ilsan Branch Office Rm 706 Nobless BD. 66-1 Juyeobdong, Ilsangu, Koyang city, Kyunggido,Korea Tet 82-31-925-7411 Fax: 82-31-922-3305 Added by Modified by 04Nov-10 by	



The **Added/by...** and **Modified/by...** fields in the lower right corner record the date and staff member who made the initial addition of this agency and last modification.

Commissions (from student fees)

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This tab lists the commission data found for any student from the current year where specific accounting fee data has been recorded. The data cannot be modified on this screen.

Double-clicking on the **Stdld** field will move you to the selected entry in the student module.

dld Firs	stName	LastName	TranDate	Amount	РауТуре	Comment	
966			28-Sep-10	Sec. A.	Internal transaction		
966	100		23-Sep-10		Internal transaction	appllied to tuition. Home:	
966	18	10 . F.	23-Sep-10		Internal transaction	homestay	
966 🦓 👯 🦾	47. S 	An	23-Sep-10	. /2	Internal transaction	health insurance	
959	433	63 2 6	27-Aug-10	100	Internal transaction		
965	Ĕ		28-Sep-10		Internal transaction		
1001 🕵 👘 👘			27-Aug-10	1.20	Internal transaction		
968	6		28-Sep-10		Internal transaction		
967 -			28-Sep-10		Internal transaction		-

Figure 34 Agent | Commissions

Report

All Agent reports are selected and generated from the Agent Report module.



