

# Adminware™ for ISP — Agents

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## 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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### Index

Introduction	1
Procedure	2
Buttons	3
Jump/find	4
Fields	5
Employees	7
Contacts	7
Notes	8
Commission	8
Report	9

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Adding a new agent to *Adminware™* is straightforward:

- ① open the Agents module. This can be either from the Main Switchboard or via the Toolbar.
  - \* Agents module button from Main Switchboard: 
  - \* 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 **I**nsert | **N**ew **R**ecord 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.

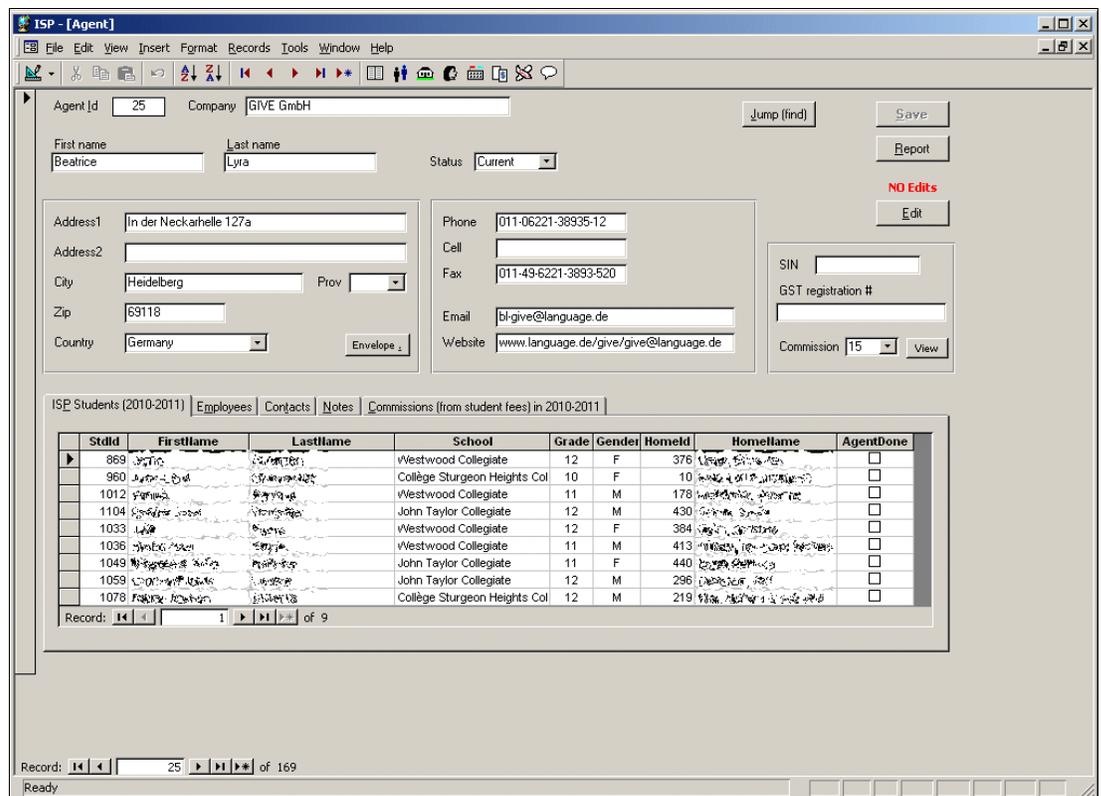


Figure 5  
Agents screen

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 **StdId** field will move you to the selected entry in the student module.

## Buttons

The various buttons found on the Agents form.



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.



The **Report** 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.



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.

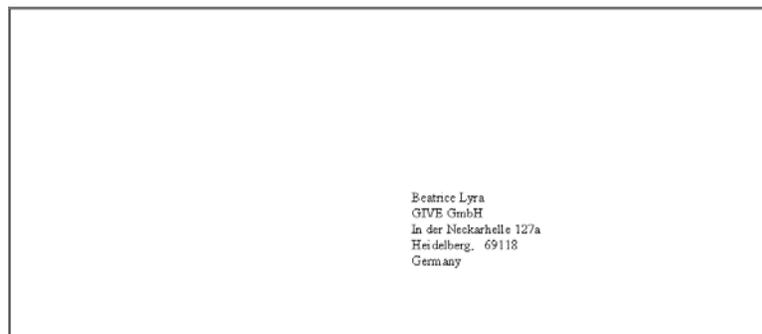


When adding a new agent record, this button has no effect.



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

This will preview the address on the screen.



## Jump/Find

Jump (find)

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

Use the **Jump (find)** button to select and move to the desired agent.

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 International E. V.	Bohm-Laubhold	Ingrid	Koln	Germany	86
Orbis Turismo Ltda.	Downer	Noel	Golanja-Go	Brazil	108
ORBIT CONSULTANT CO., LT	CHEN	NICOLE	Taipei	Taiwan	124
Overseas Edu. Inc.	Troes	Rosa Maria	Vancouver	Canada	173
Penprapa Advisory Study Abi	Vudhivate	Penprapa	Nonthaburi, North	Thailand	134
Persona Grata (PG)	Gryshina	Alena	Moscow	Russia	121
Petra Jude	Kim	Hyeyoung	Bad Neuenahr-Ahr	Germany	101
Power Education	Kim	Hyeyoung	Seoul	South Korea	159
Prolink Overseas Studies Con	Leung	Daniel	Kiun Tong Kowloo	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 **Go To ...** button to move to the selected company.

GoTo GIVE GmbH

*Filter:*

Find...  
Company: [ ] Last name: [ ] First name: [ ] Country: [ ] Filter

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

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

The fields are listed in the order they appear as you **Tab** through the screen.

Agent Id The Agent Id is automatically assigned by *Adminware*<sup>TM</sup>, in numerical sequential order. This number cannot be modified. Agent Id

This number is used by *Adminware* to relate data from the various other tables.

Company The full company name of the agent. Company

First name Enter the agent's first name. First name

Last name Enter the agent's last name. Last name

Status Define the current status of this agent. This is useful to group and organize your agents. Status

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

Address2 Enter a second line of an address, if required. Address2

City Enter the city for this agent. City

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. Prov

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

Zip The zip code for this agent. Zip

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.

A dropdown menu with the label 'Country' and the selected value 'Brazil'.

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.

A form with five input fields: Phone (011-7495 730 2082), Cell (empty), Fax (011-7-495-253-9017), Email (irina@parta.org), and Website (http://www.parta.org).

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.

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***

SIN The agent's Social Insurance Number.

GST registration # The GST registration # for this agent.

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

A form with three input fields: SIN (empty), GST registration # (empty), and Commission (15). There is a 'View' button next to the Commission field.

## Employees

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)

Emplo	Lastname	Firstname	Position	Address1	Address2	City	Prov	Zip
1			Commercial supervisor			Sao Paulo		
2			Director of Operations	apps, docs, Hs, flights	EXISTING STUDENTS			
3			Produce Manager	Fairs, trainings orientat				
5			TO MAIN EMAIL ABC	SPECIFIC PERSON				
8				Campinas				
9								
10								

**Figure 31**  
Agent | Employees

## Contacts

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.

CDate	ContactForm	Reason	StId	Notes
05-May-10	E-mail received	First contact		

**Figure 32**  
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

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

Ilsan Branch Office  
Rm 706 Nobless BD, 66-1 Juyeobdong, Ilsangu, Koyang city, Kyunggido, Korea  
Tel: 82-31-925-7411  
Fax: 82-31-922-3305

Added by...  
04-Nov-10 AH

**Figure 33**  
Agent | Notes

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)

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.

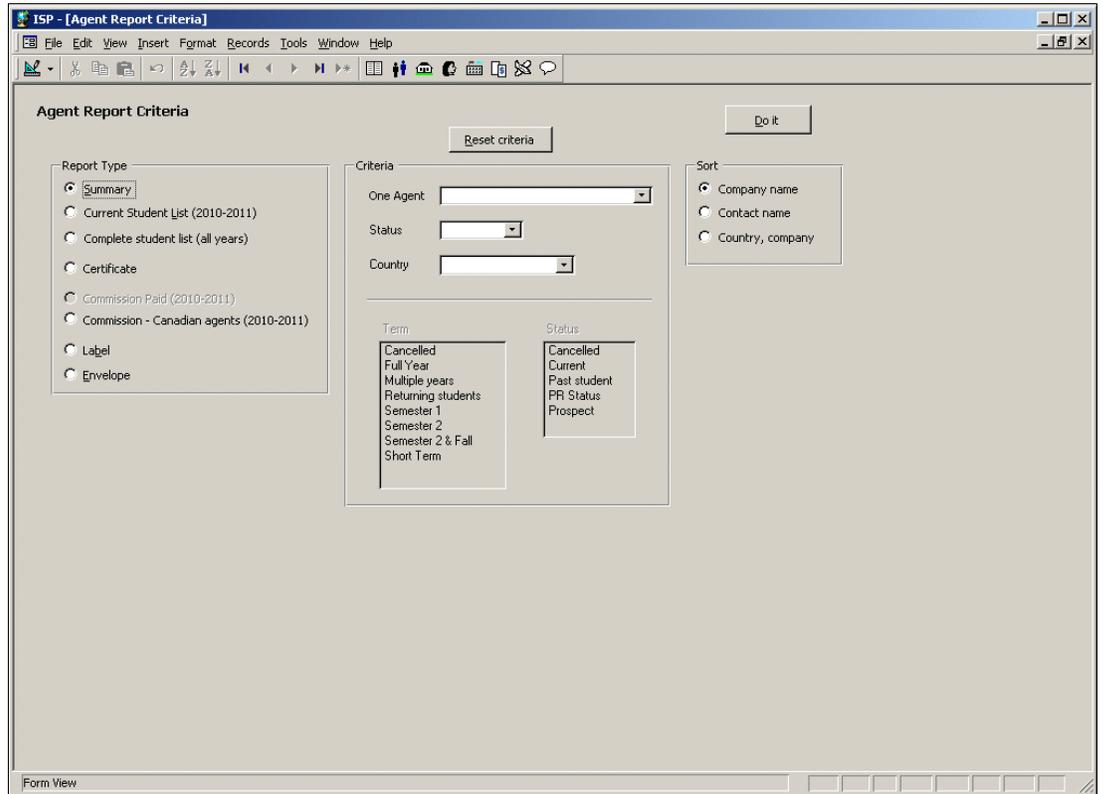
Double-clicking on the **StdId** field will move you to the selected entry in the student module.

StdId	Firstname	Lastname	TranDate	Amount	PayType	Comment
966			28-Sep-10		Internal transaction	
966			23-Sep-10		Internal transaction	applied to tuition. Homes:
966			23-Sep-10		Internal transaction	homestay
966			23-Sep-10		Internal transaction	health insurance
959			27-Aug-10		Internal transaction	
965			28-Sep-10		Internal transaction	
1001			27-Aug-10		Internal transaction	
968			28-Sep-10		Internal transaction	
967			28-Sep-10		Internal transaction	

Record: 1 of 23

**Figure 34**  
Agent | Commissions

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



**Figure 35**  
Agents report screen