Salespeople

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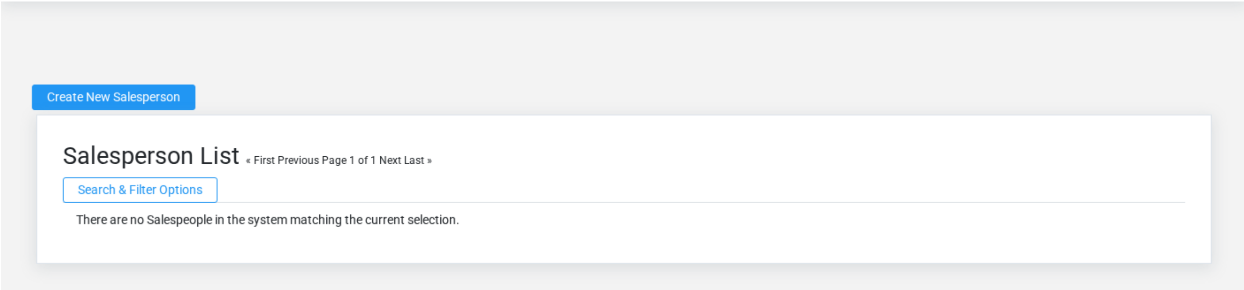
Purpose and when to use this record



The Salespeople overview screen in the Brisk documentation demo.

Connect sales activity to the responsible salesperson for assignment, customer service, and commission reporting.

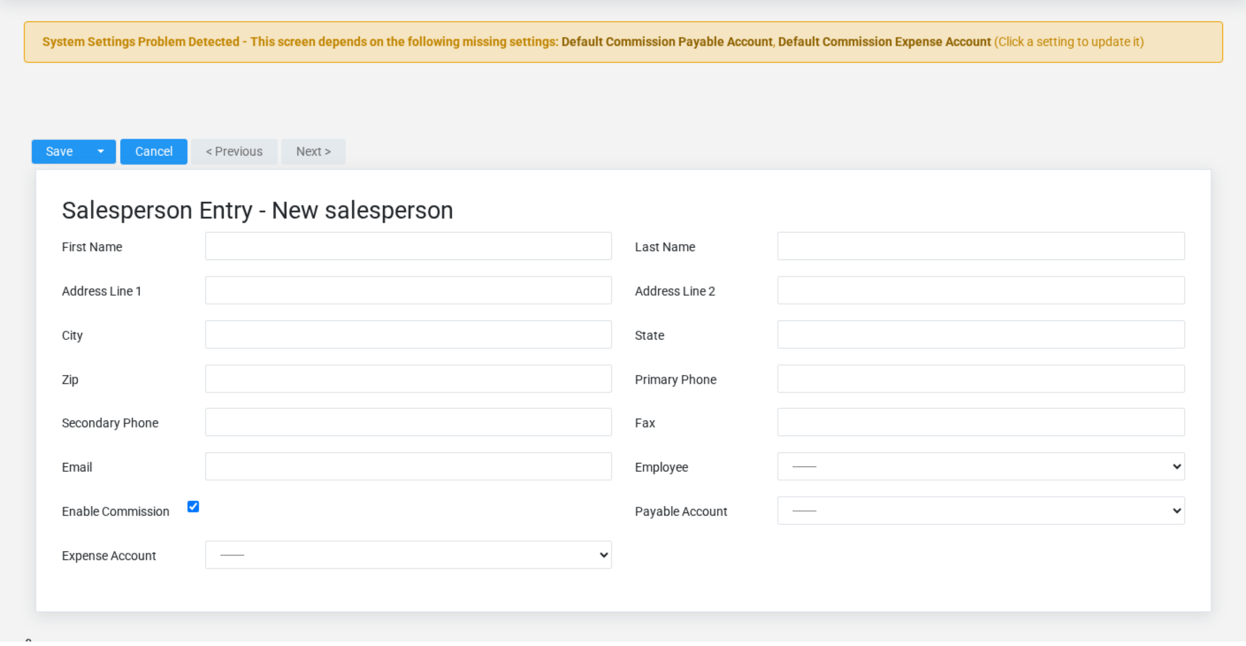
At a glance

- **Identify it by: First Name**, and **Last Name**.
- **Check its business context: Employee**, **Payable Account**, and **Expense Account**.
- **Why care:** These master records supply defaults and choices to later transactions. Correct duplicates and inactive records before staff build more activity on the wrong record.

Before you begin

You need the Brisk permission for the action you are taking on salespeople. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Create a salesperson



The Salespeople create screen in the Brisk documentation demo.

Create a salesperson only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Employee**, **Payable Account**, and **Expense Account**.
2. Enter the required identifying and operational values: **First Name**, **Last Name**, **Address Line 1**, **City**, **State**, and **Zip**, plus the remaining screen fields.
3. Review **Enable Commission** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the salesperson, then confirm **First Name**, and **Last Name** on its detail page before continuing.

After saving: Verify **Employee**, **Payable Account**, and **Expense Account** on the detail page, then continue the management workflow only when those values agree with the source document and actual work performed.

Delete a salesperson

Delete this salesperson only when it was entered by mistake and no downstream history depends on it. Use a reversal, void, credit, counter-adjustment, or status correction for a real event that later changed.

Before confirming, check for related **Commission Payments**, **Customers**, **Foodservice Tables**, **Quotes**, and **Sales**, plus the remaining screen fields. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **First Name**, and **Last Name**. After confirmation, return to the Salespeople list and make sure only the intended salesperson was removed.

Review salesperson details

Use the detail page as the shared record of what this salesperson currently means. Verify **First Name**, **Last Name**, **Address Line 1**, and **Address Line 2** before relying on it for a decision.

Follow **Employee**, **Payable Account**, and **Expense Account** to determine whether the issue is on this salesperson or on one of those linked records.

Next check: Verify **Employee**, **Payable Account**, and **Expense Account** on the detail page, then continue the management workflow only when those values agree with the source document and actual work performed.

Edit an existing salesperson

Edit this salesperson to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

1. Open the detail page. Compare **Employee**, **Payable Account**, and **Expense Account** with the supporting document or approved request.
2. Recheck **Payable Account**, and **Expense Account**. These values are most likely to change future transactions, defaults, assignment, pricing, and reporting.
3. Save the change, return to the list, and confirm that the salesperson now appears under the expected **First Name**, and **Last Name**.

After the change: Verify **Employee**, **Payable Account**, and **Expense Account** on the detail page, then continue the management workflow only when those values agree with the source document and actual work performed.

Fields and business rules

Brisk stores 15 user-relevant fields for this salesperson, including 3 linked-record selections and 0 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
First Name	Yes	The first name recorded for this salesperson.

Field	Required	What it controls
Last Name	Yes	The last name recorded for this salesperson.
Address Line 1	Yes	The address line 1 recorded for this salesperson.
Address Line 2	No	The address line 2 recorded for this salesperson.
City	Yes	The city recorded for this salesperson.
State	Yes	The state recorded for this salesperson.
Zip	Yes	The zip recorded for this salesperson.
Primary Phone	Yes	The primary phone recorded for this salesperson.
Secondary Phone	No	The secondary phone recorded for this salesperson.
Fax	No	The fax recorded for this salesperson.
Email	No	The email recorded for this salesperson.
Employee	No	Link this salesperson to an employee record.
Enable Commission	No	Disabling this option will stop this salesperson from earning any commission.
Payable Account	No	Sets the GL account to which this commission payable transactions post for this salesperson.
Expense Account	No	Sets the GL account to which this commission expense transactions post for this salesperson.

What happens next

Verify **Employee**, **Payable Account**, and **Expense Account** on the detail page, then continue the management workflow only when those values agree with the source document and actual work performed.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **First Name**, **Last Name**, **Address Line 1**, **City**, **State**, and **Zip**, plus the remaining screen fields and any message beside the field. A required related record may also be inactive or unavailable to your role.

- **The values look right but the result is wrong:** Open **Employee**, **Payable Account**, and **Expense Account** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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