

Creating AR Agents

1. The first step in creating an Agent is that you must have an **Agency** To do this, choose option **5** for *Agent Processing* in the **Accounts Receivable** main menu.
2. Next choose option **22** for *Agency Maintenance*.
3. Enter in the **Agency Code** you wish to assign.
 1. This Agency Code may be either alpha or numeric.
 1. If you want the system to assign the numeric code, simply enter a period "." to let the system assign the next sequential number available.
 2. If the Agency Code is a new code you are adding to the system, you will receive the prompt that the item is not on file. Choose the **Add** option to add the item.
 3. Type in the description for the Agency.
 4. Choose the **Update** option to finish adding the item.
 5. Next, choose option **21** from the **Agent Processing** menu for *Agent Maintenance*.
 6. Enter a period "." to let the system assign the next sequential number for the **Agent #**.
 7. You must fill in all the required fields in the *Agent Maintenance* The required fields are:
 1. **Last Name**
 2. **Status**
 1. Use **A** for active
 3. **Agency Code**
 6. This is the Agency Code as described in steps 1-6.
 4. **Statement Format**
 1. Enter a double question mark (??) and choose from the list.
 5. All other fields are optional and may be

filled in later if you choose by **Modifying** the record.

6. Make sure you choose the **Save** option to save the Agent you created.