

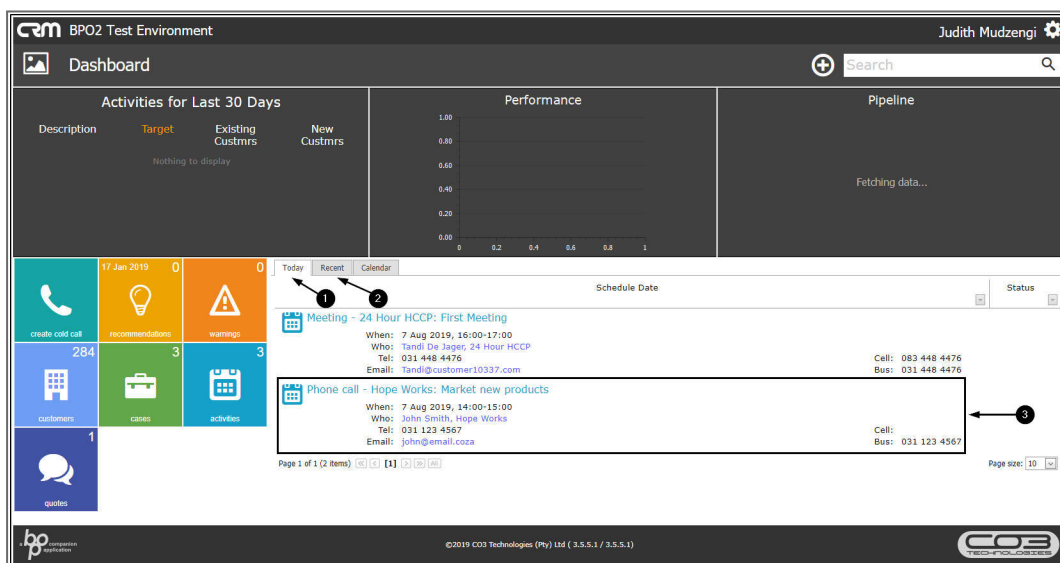
CRM CUSTOMERS

SALESMEN

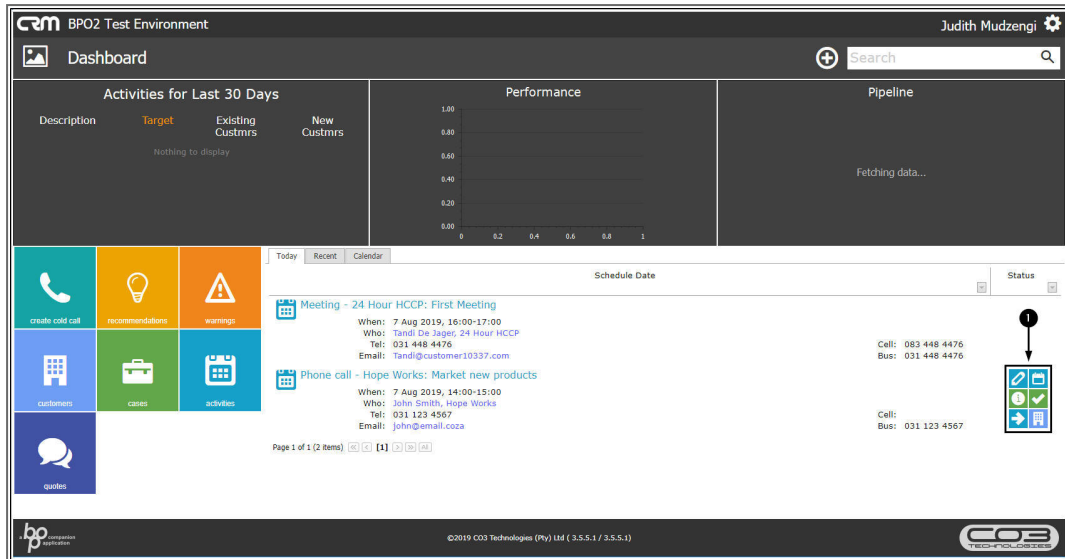
Salesmen will list all linked Salesmen for the selected customer.

Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

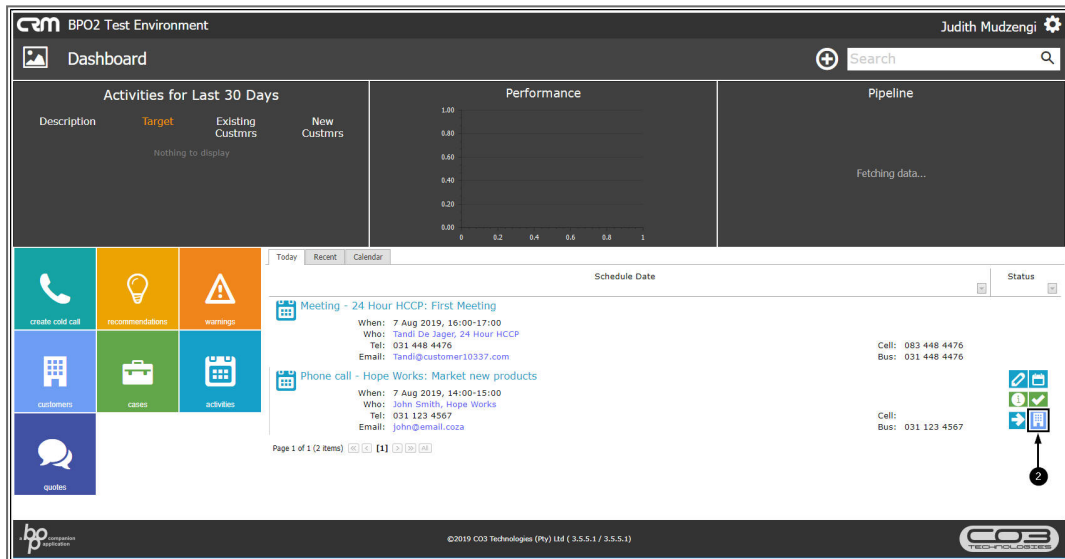
1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view salesmen for.



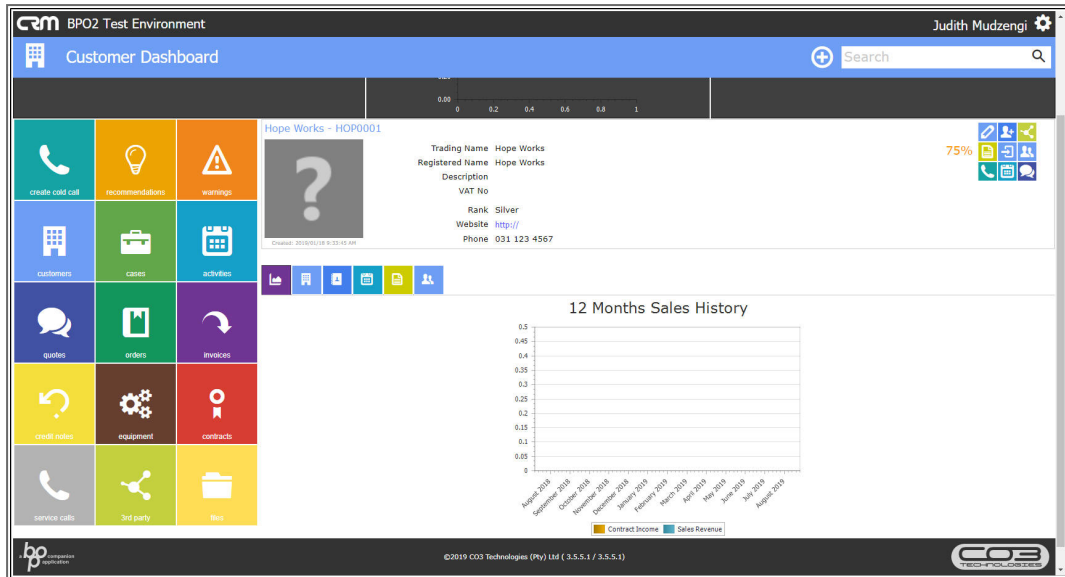
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



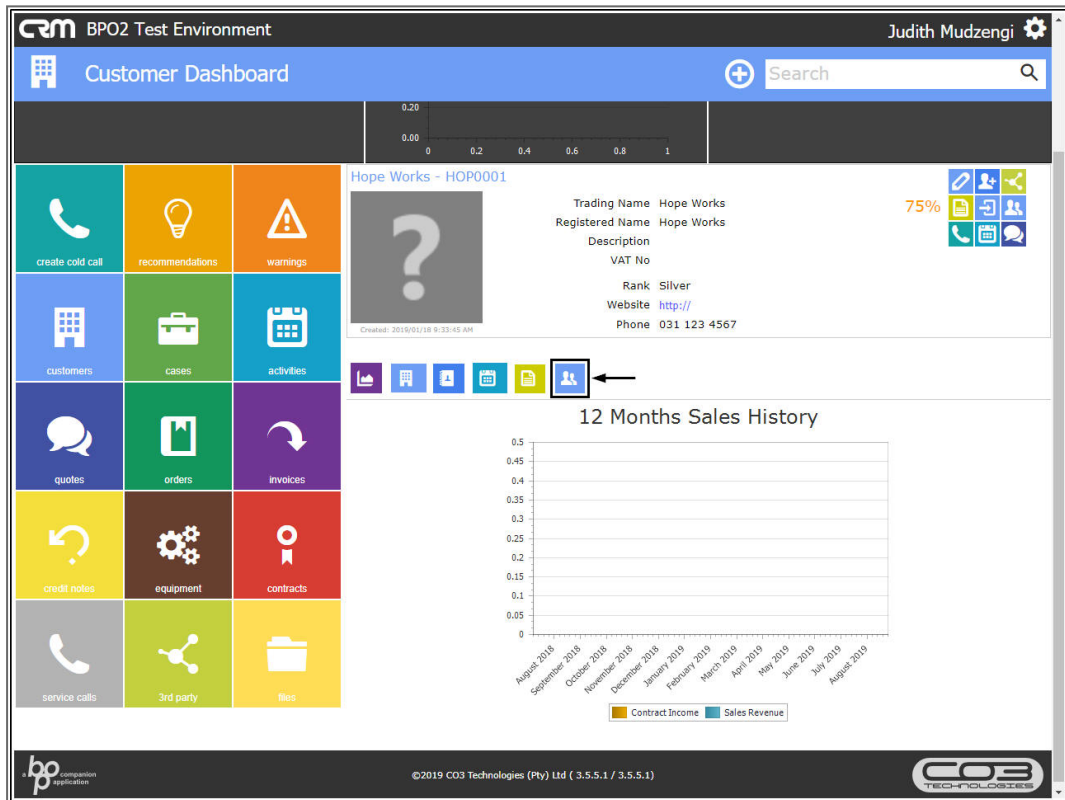
2. Click on the **View Customer** icon.



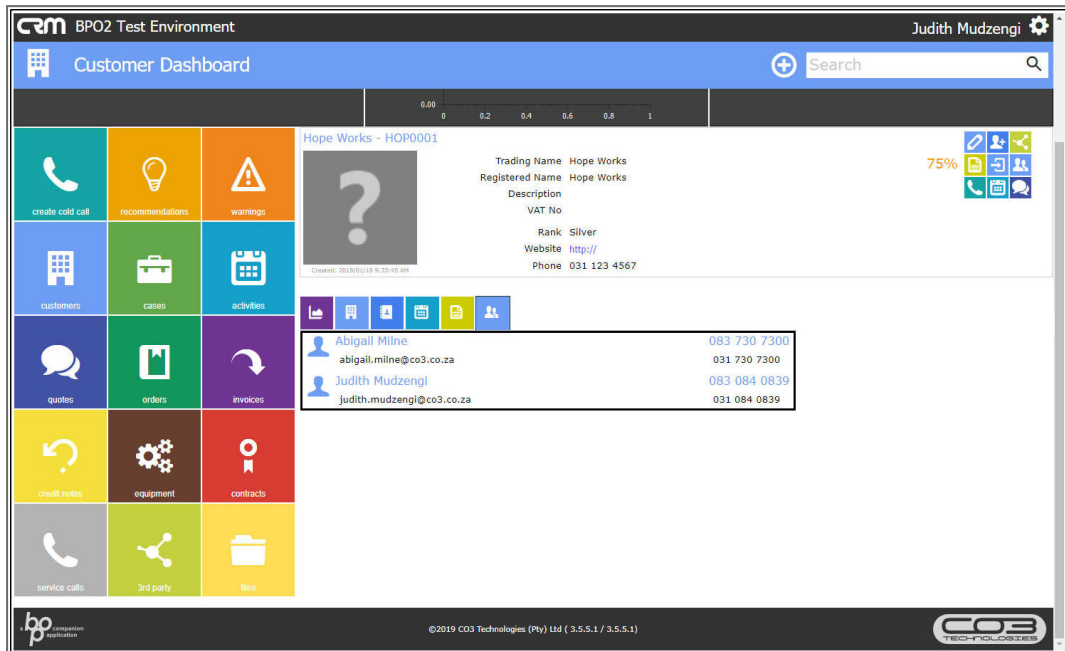
- The **Customer Dashboard** will be displayed.



- Click on the **Salesmen** icon.



- You can now view salesmen linked to this customer. If you want to make changes to the linked Salesmen, refer to Customer Details - **Maintain Customer Salesmen**.



CRM BPO2 Test Environment Judith Mudzengi

Customer Dashboard Search

Hope Works - HOP0001

Trading Name Hope Works
Registered Name Hope Works
Description
VAT No
Rank Silver
Website <http://>
Phone 031 123 4567

75%

Created: 2018/01/18 9:33:18 AM

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