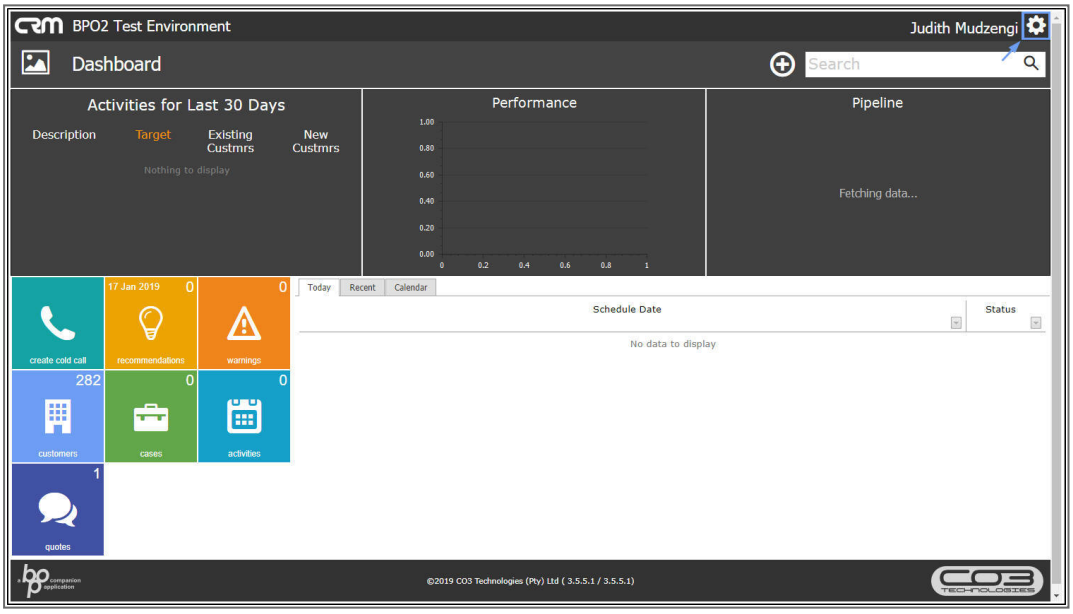
CRM SETTINGS

SALESMEN SETTINGS

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

CONFIGURE SALESMEN

- Click on the ***Settings*** button to the right of your ***UserName***.



- The session ***Options*** page will pop up.
- Click on the ***Salesmen Settings*** tile.

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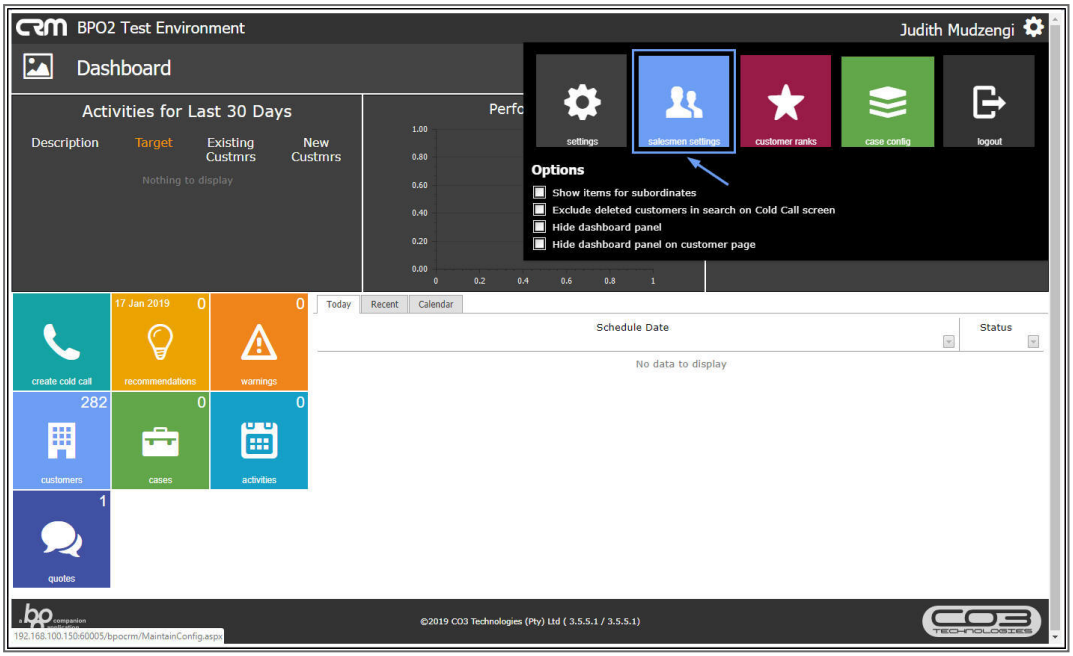
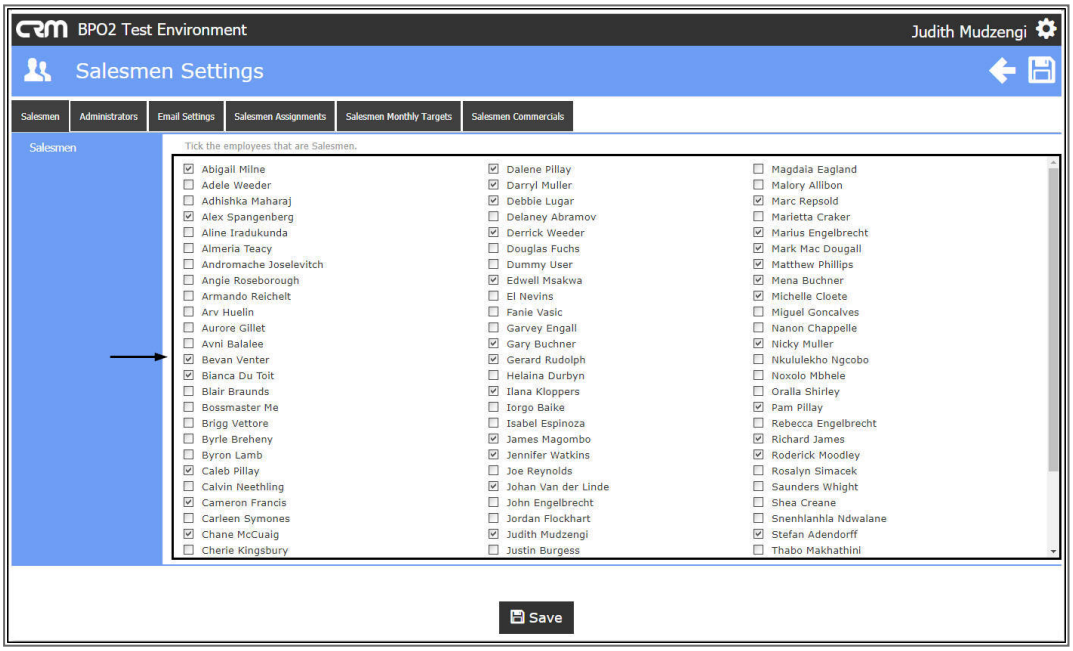


- The ***Salesmen Settings*** screen will be displayed.



1. Within the ***Salesmen*** tab,
2. The ***Salesmen*** section lists all employees in the system.

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3. Tick the ***check boxes*** for all the employees that are Salesmen.
4. Click on ***Save***.

- ***Note 1***: Remember to maximise your screen if you do not see the ***Save*** button.
- ***Note 2***: Remember you can also use the ***Save*** icon at the top right of your screen to save changes.

- You will return to the ***Dashboard***.

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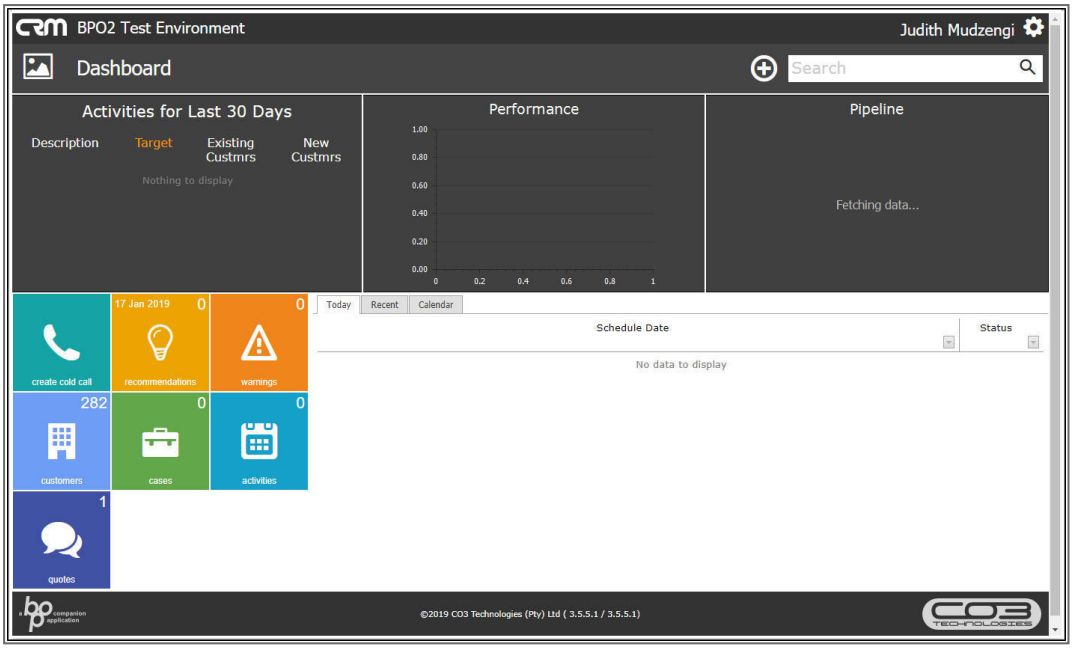

CRM.003.002

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