

# **CRM SETTINGS**

## **SALESMEN ASSIGNMENTS**

**Ribbon Access:** Webpage > http://[servername]:[portno]/BPOCRM/User.aspx

#### **SALESMEN SETTINGS - ASSIGNMENTS**

CCM BPO2 Test Environment	Judith Mudzengi 🔯			
🖾 Dashboard		🕀 Search		
Activities for Last 30 Days	Performance	Pipeline		
Description Target Existing New Custmrs Custmrs	0.80			
Nothing to display	0.60			
	0.40	Fetching data		
	0.20			
	0.00 0.2 0.4 0.6 0.8 1			
17 Jan 2019 0 0 Today Re	cent Calendar			
	Schedule Date	v v		
create cold call recommendations warnings	No data to disp	lay		
282 0 0				
customers cases activities				
1				
quotes				
62019 C03 Technologies (Pv) Ltd ( 3.5.5.1 / 3.5.1)				

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

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



CCM BPO2 Test Environment	Judith Mudzengi 🍄 🅯
🖾 Dashboard	
Activities for Last 30 Days Description Target Existing New Custmrs Custmrs Nothing to display	Perfc understanding to the set of the set
17 Jan 2019     0     0     Today       Create cold call     282     0     0       Castomers     caste     advises	0     0.2     0.4     0.5     0.4     1         Recent     Cilendar   Schedule Date       Schedule Date     Status   No data to display
custos 	62019 C03 Technologies (Phy) Ltd ( 3.5.5.1 / 3.5.5.1)

- 1. The *Salesmen* tab will be selected by default.
- 2. Click on the *Salesmen Assignments* tab.

CRM BPO2 Test E	nvironment		Judith Mudzengi 🕻	¥
🤽 Salesmer	n Settings		<del>+</del> E	a
Salesmen Administrators En	nail Settings Salesmen Assignments Salesmen M	Ionthly Targets Salesmen Commercials		
Salesmen	Trick the employees that are Salesmen.  Abigail Miline Adele Weeder Adhishka Maharaj Aline Iradukunda Almeria Teacy Andromache Joselevitch Angle Roseborough Armando Reichelt Arvy Huelin Aurore Gillet Avni Balalee Dense Koester	V Dalene Pillay     V Darryl Muller     V Debble Lugar     Delaney Abramov     Derrick Weeder     Douglas Fuchs     Dummy User     Edwell Msakwa     El Nevins     Fanie Vasic     Garvey Engall     V Gary Buchner     Cocord Duddebb	Magdaia Eagland Malory Allibon Marc Repsold Marietta Craker Marius Engelbrecht Mark Mac Dougali Mathew Phillips Mathew Phillips Machael Cloete Miguel Goncalves Nanon Chappelle Vicky Muller	•
	Bevan venter     Blanca bu Tolt     Blanc Braunds     Borsmaster Me     Brigg Vettore     Byrle Breheny     Byron Lamb     Caleb Pillay     Caleb Pillay     Carreno Francis     Carreno Francis     Carren Francis     Charle McCuaig     Cherie Kingsbury	Gerara Kudopin     Helaina Dudrpn     Ulana Kloppers     Iorgo Baike     Isabel Espinoza     James Magombo     Jannifer Watkins     Joe Reynolds     Johna Van der Linde     Johna Kan der Linde     Johna Kan der Linde     Johns Kan thereforden Flockhart     Jothan Kins Burgess     Karlis Gilhool	Noxolo Mbhele     Oralla Shirley     Pam Pillay     Rebecca Engelbrecht     Kichard James     Roderick Moodley     Sauders Whight     Shea Creane     Snenhlanhla Ndwalane     Sterlan Adendorff     Thabo Makhathini     Thiban Latchmanan	
		🗄 Save		



- The *Assignments* section will be displayed.
- The Salesmen list on the right hand side will show you a list of Salesmen.

CRM BPO2 Test	t Environment		Judith Mudzengi 🌣		
🤽 Salesm	en Settings		← 🗎		
Salesmen Administrators	Email Settings Salesmen Assignmen	s Salesmen Monthly Targets	Salesmen Commercials		
Choose Salesman	Salesman to manage				
Assignments	Tick Customers that you want Changes are only applied whe	to re-assign, then drag and dro	them on the new salesman on the right.		
	*	Customer	A bigail Mine Abigail Mine Alex Spangenberg		
		No customers	Bianca Du Tolt Caleb Pillay Caleb Pillay Cameron Frands Chane McCuaig Chane McCuaig Chane McCuaig Coll Admin Coll Holden Page 1 of 4 (36 items) C [1] 2 3 4 2		
	E Save				

### **VIEW CUSTOMERS LINKED TO A SALESMAN**

 To view customers linked to a salesman (i.e. where the salesman is either the 'main salesman' or 'additional salesman'), click on the *Expand* button.



CTM BPO	BPO2 Test Environment						Judith Mudzengi 🌣
🤽 Sal	🔱 Salesmen Settings						🔶 🗎
Salesmen Admini	istrators	Email Settings	Salesmen Assignments	Salesmen Monthly Targ	ets Sale	smen Commercials	
Choose Salesma	an	Salesm	ian to manage				
Assignments		Tick Cus	tomers that you want to i	re-assign, then drag and	d drop them	on the new salesman on the right.	
		# .	Custon		a         1         Abia           a         1         Alexan           a         1         Bev           a         1         Bev           a         1         Bev           a         1         Cala           a         1         Cala	gail Milne x Spangenberg ran Venter nca Du Toit eb Pillay neron Francis une McCuaig is Haynes 3 Admin in Holden 16 Items) ( <b>[1]</b> 2 3 4 )	
				🗎 Save	Э		

• A list of customers linked to the salesman will be displayed (i.e. where the salesman is either the 'main salesman' or 'additional salesman').



CCM BPO2 Test	Environment	Judith Mudzengi 🌣				
🤽 Salesm	🤽 Salesmen Settings 🔶 🗎					
Salesmen Administrators	Email Settings         Salesmen Assignments         Salesmen Monthly Targets         Salesmen Commercials					
Choose Salesman	Salesman to manage					
Assignments	Tick Customers that you want to re-assign, then drag and drop them on the new salesman on the right. Changes are only applied when you save.					
	No customers Bevan Venter Bianca Du Toit Bianca Du Toit Bi					
Save						

#### **REASSIGN CUSTOMER TO ANOTHER SALESMAN**

- If you need to you need to reassign a customer to another salesman, e.g. the salesman has left, or changed selling 'areas'.
  - 1. In the Choose Salesman field,
  - 2. click on the *down arrow* that pops up when you hover over the *Choose Salesman text box*.



CCM BPO2 Test E	CM BPO2 Test Environment				Judith Mudzengi 🌣	
🤽 Salesmer	🤽 Salesmen Settings					🔶 🗎
Salesmen Administrators Er	nail Settings Sal	esmen Assignments	Salesmen Monthly	Targets	Salesmen Commercials	
Assignments	Tick Customer Changes are o #	rs that you want to ro nly applied when yo Custorr No customers	e-assign, then drag u save. her Image: Constraint of the second	and dro () () () () () () () () () () () () () (	p them on the new salesman on the right. Abigail Milne Alex Spangenberg Bevan Venter Bianca Du Toit Caleb Pillay Cameron Francis Chane McCuaig Chris Haynes	
CO3 Admin CO3 Admin Colin Holden Page 1 of 4 (36 items) < [1] 2 3 4 3						

- 1. A *Salesmen drop-down menu* will be displayed.
- 2. Select the relevant salesman.
  - In this image, *Bevan Venter* has been selected.

CCM BPO2 Test Environment	Judith Mudzengi 🌣
3. Salesmen Settings	🔶 🗎
Salesmen     Administrators     Eniail Settings     Salesmen Assignments     Salesmen Monthly Targets     Salesmen Commercials       Choose Salesman     Unassigned Customers Abigal Milne Alex Spangenberg Bavan Venter Banca Du Tol Caleb Pillay Cameron Francis     2       Image: Caleb Pillay Caleb Pillay     Image: Caleb Pillay Cameron Francis       Image: Caleb Pillay Cameron Francis       Image: Caleb Pillay Cameron Francis	
a ₹ Chris Haynes Page 1 of 4 (36 items) < [1] 2 2 4 > ■ Save	



- 1. A list of customers will come up, where this salesman is the default salesman.
- Select the customer(s) that need to be re-assigned, by ticking the *check* box(es).
- 3. Drag and drop the customer(s) to the relevant Salesman. When reassigning a customer, all related cases, reminders and recommendations for the salesman are reassigned to the new salesman.
  - In this image, customer *Actuating Drabble* is being reassigned from *Bevan Venter* to *Abigail Milne*.

CCM BPO2 Test	CCM BPO2 Test Environment					
🤽 Salesmo	3 Salesmen Settings					
Salesmen Administrators	Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials					
Choose Salesman	Bevan Venter					
Assignments	Tick Customers that you want to re-assign, then drag and drop them on the new salesman on the right. Changes are only applied when you save.					
	Customer     Abigail Milne					
	Alex Spangenberg					
	Abatz Simkiss					
	ABS Thoughtsphere					
2-	Actuating Drabble					
	Adapter Eire					
	Adapter Persevering					
	Agilent ADS Game Design					
	Algorithm Core     Algorithm Core     CO3 Admin					
	Alismataceae Web-Enabled					
Page 1 of 14 (277 ttems) ( [1] 2 3 4 5 6 7 12 13 14 ) A Page 1 of 4 (36 items) ( [1] 2 3 4 )						
	🖺 Save					

- The customer will no longer be displayed in the customers list of the previous salesman.
  - In this image, *Actuating Drabble* is no longer displayed in *Bevan Venter*'s customer list.



CRM BPO2 Test E	Judith Mudzengi 🍳	
Salesmen Administrators E Choose Salesman	Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials Bevan Venter	
Assignments	Tick Customers that you want to re-assign, then drag and drop them on the new salesman on the right.         Changes are only applied when you save.         Image: Customer         Image:	Σ

- 1. Click on the *Expand* button to view the current salesman's customers list.
- 2. The customer will now be displayed in the current salesman's customer list.
  - In this image, customer *Actuating Drabble* is now displayed in *Abigail Milne*'s customer list.
- 3. Click on *Save*.
- Note: Remember to <u>maximise</u> the screen if you do not see the Save button.



CCM BPO2 Test	Environment	Judith Mudzengi 🌣
🤽 Salesme	en Settings	🔶 🗎
Salesmen Administrators	Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials	
Choose Salesman	Bevan Venter	
Assignments	Tick Customers that you want to re-assign, then drag and drop them on the new salesman on the right. Changes are only applied when you save. Customer Customer Abigail Milne	*
	Image: Constraint of the constraint	
	Save 3	

• You will return to the *Dashboard*.

CCM BPO2 Test Environment		Judith Mudzengi 🌣 🕯
🔀 Dashboard		Search Q
Activities for Last 30 Days	Performance	Pipeline
Description Target Existing New Custmrs Custmrs	0.80	
Nothing to display	0.60	Fetching data
	0.40	
	0.00 0 0.2 0.4 0.6 0.8 1	
17 Jan 2019 0 Today	Recent Calendar	
🔍 🖓 🔬 🗕	Schedule Date	Status V
create cold call recommendations warnings	no data to dis	spiay
Customers Cases activities		
quotes		
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