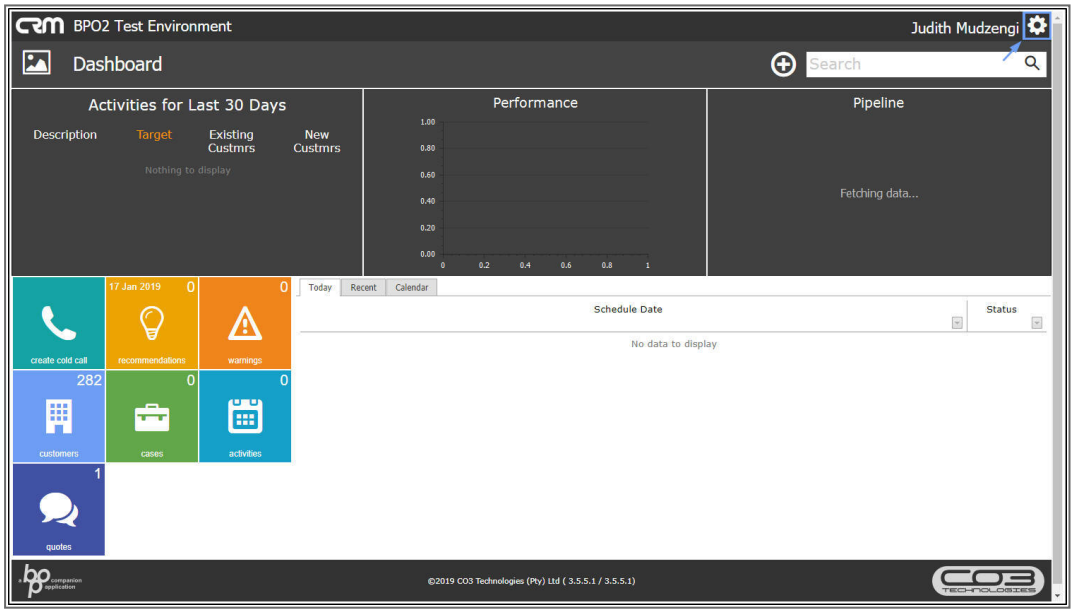
CRM SETTINGS

SALESMEN COMMERCIALS

- The ***Salesmen Commercials*** option is for linking commercials created in ***BPO*** to salesmen in ***CRM***.
- This will be used in ***BPO Sales Studio*** quotes to allocate individual salesman unit costs.

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

- 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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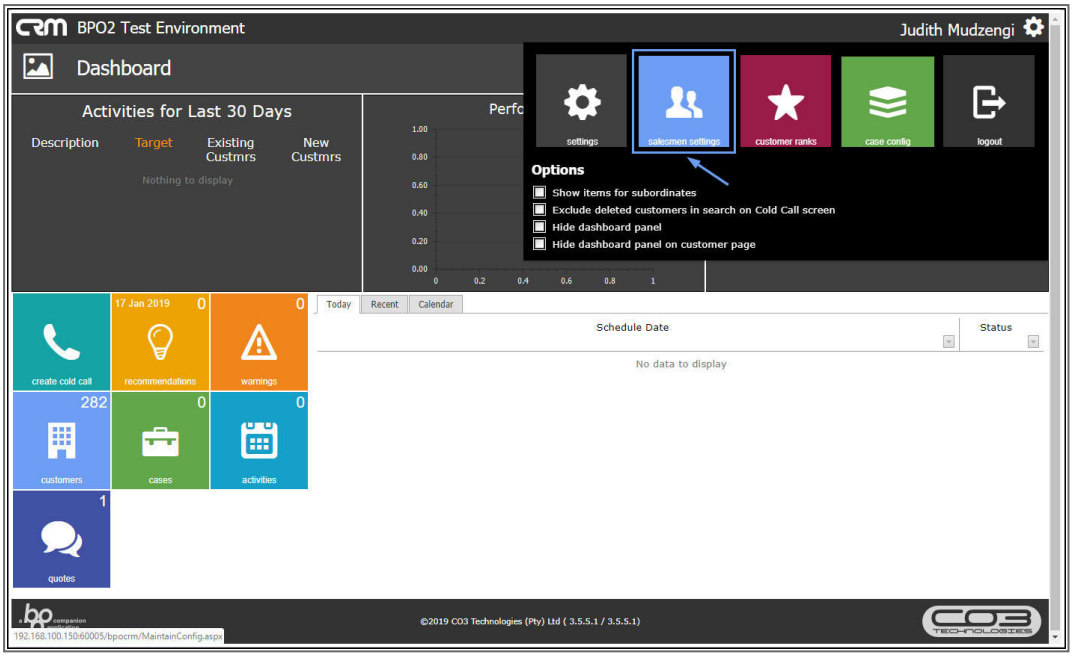
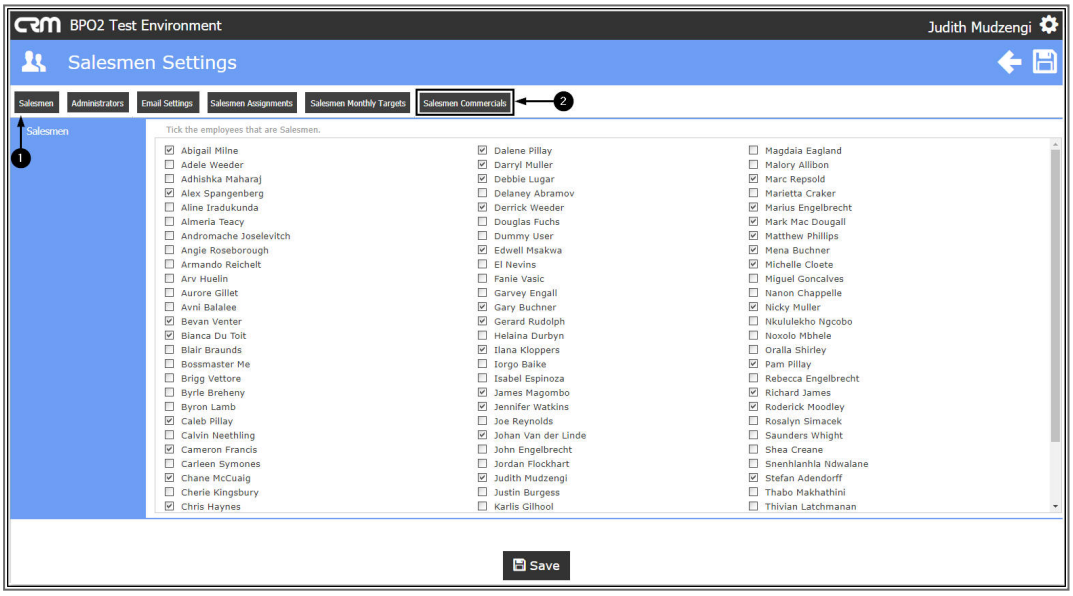


1. The ***Salesmen*** tab is selected by default.
2. Click on the ***Salesmen Commercials*** tab.



- A list of all salesmen with their respective commercials will be displayed.

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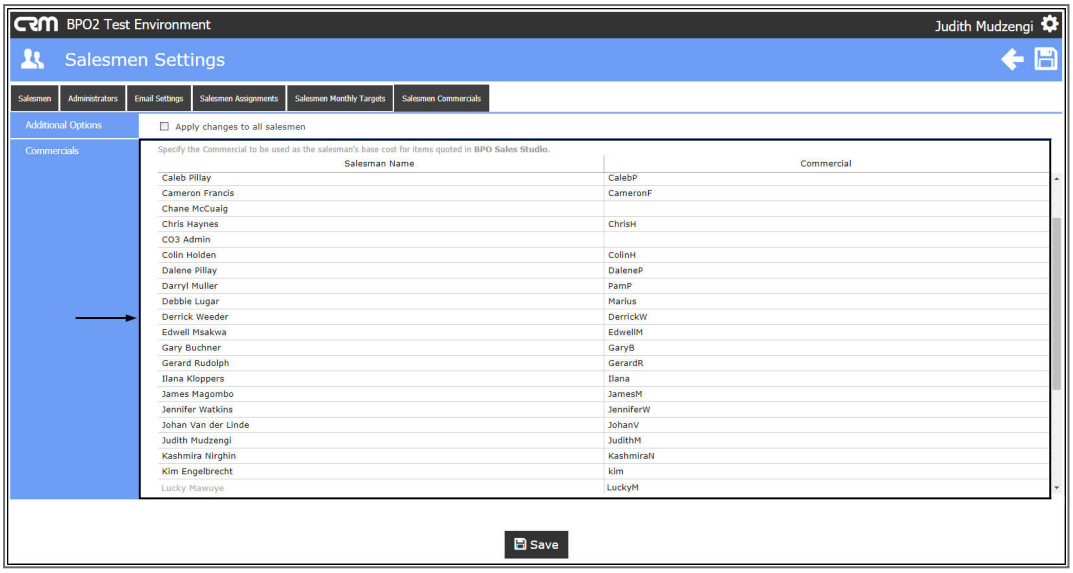
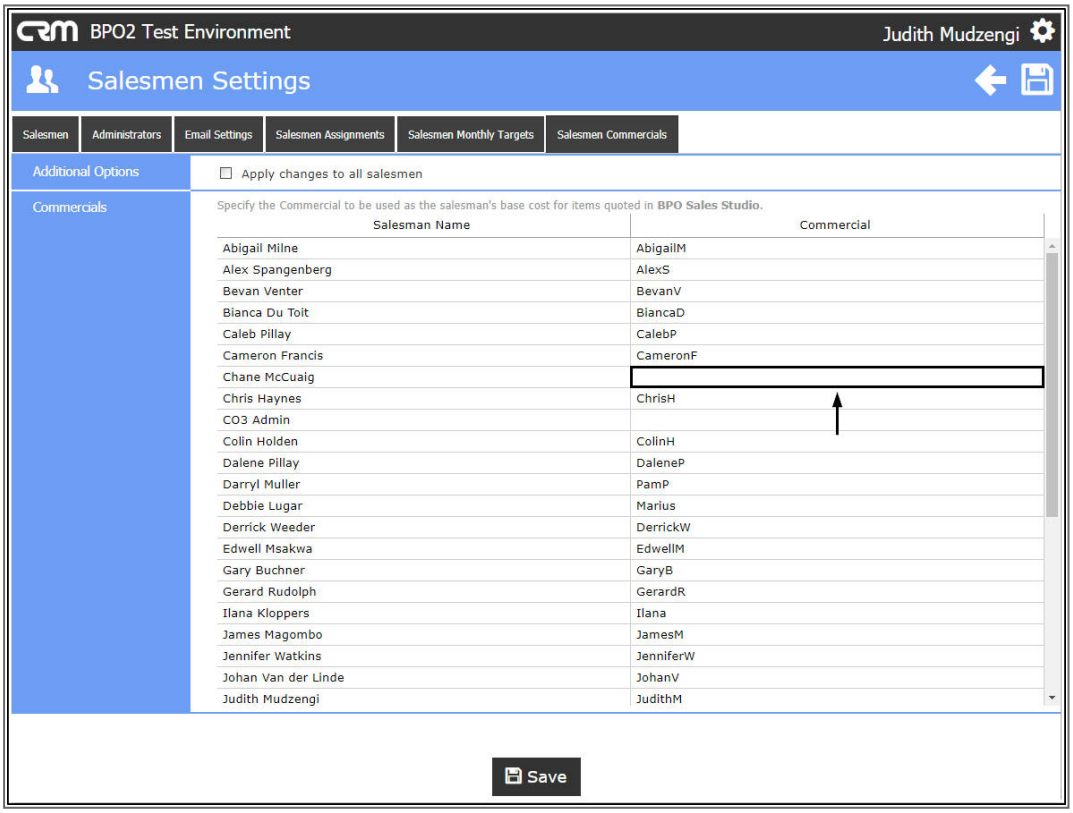


Link A Commercial To A Salesman

- Click on the ***Commercial textbox*** of the Salesman you wish to link a commercial to.



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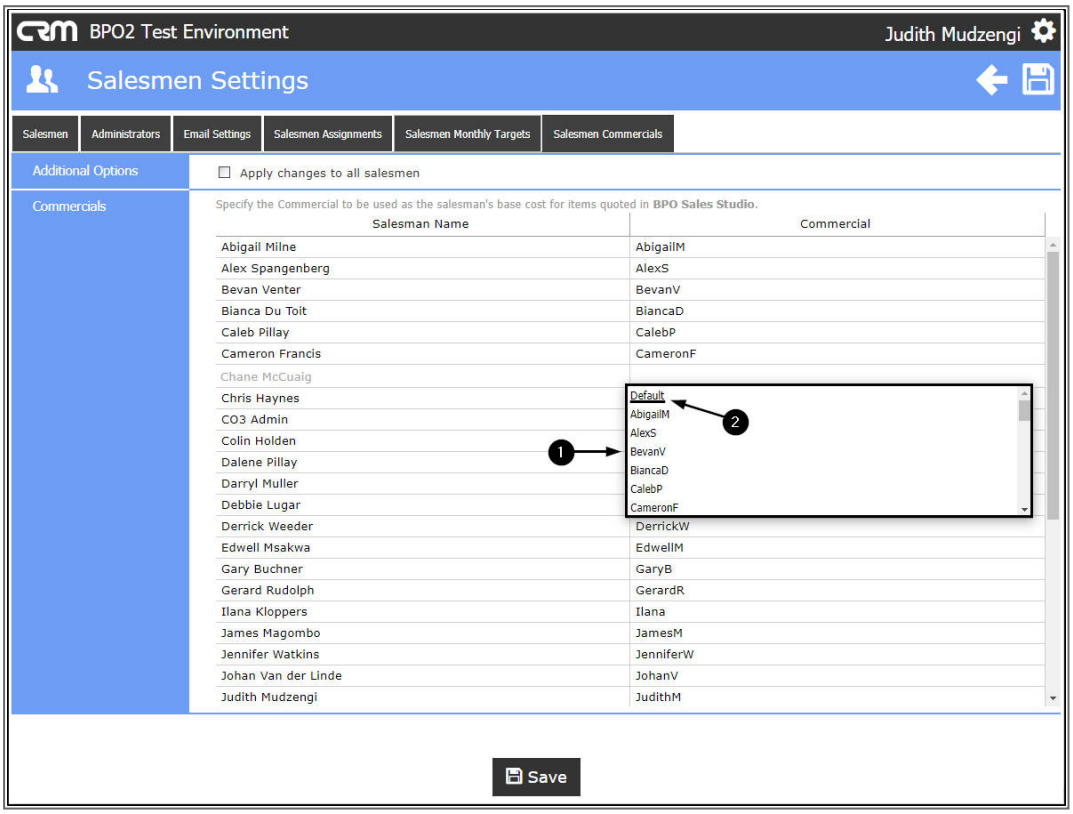
1. A ***menu*** will be displayed.
    - ***Note***: If the menu is not displayed, click on the ***Commercial textbox*** again.
2. Select the relevant commercial.
    - In this image, ***Default*** commercial has been selected.



1. The ***Commercial textbox*** will now be populated with the selected ***Commercial***.
2. Click on the ***Save*** button or
3. ***Save*** icon.

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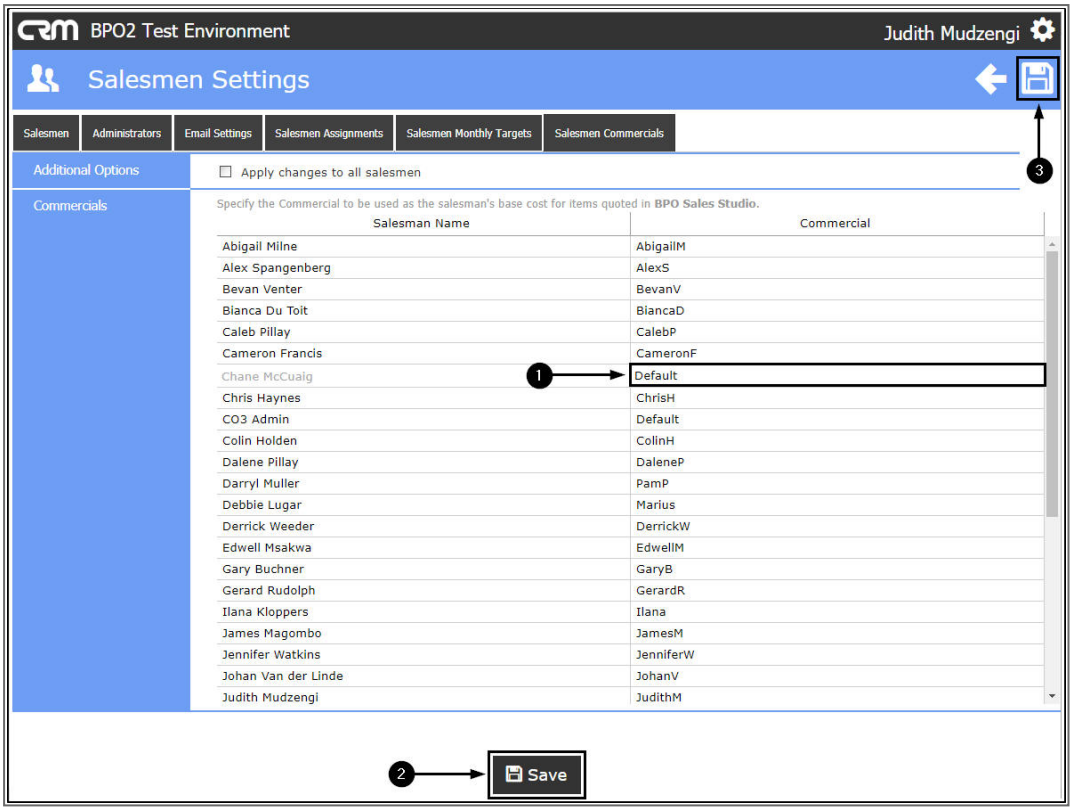
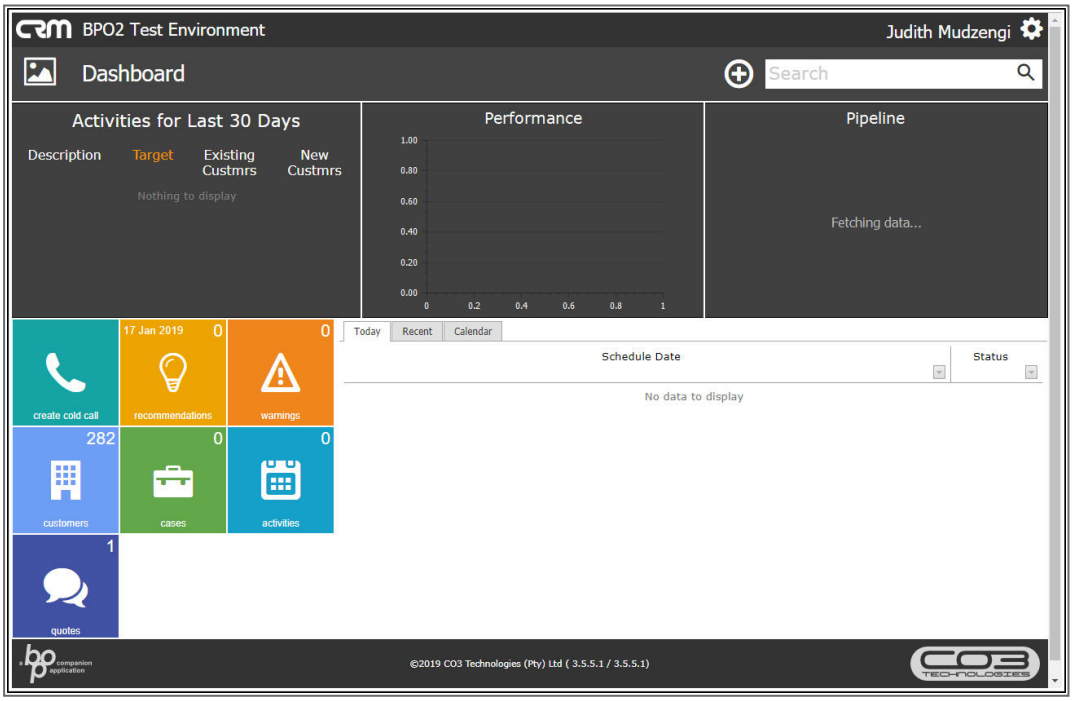


- You will return to the ***Dashboard***.



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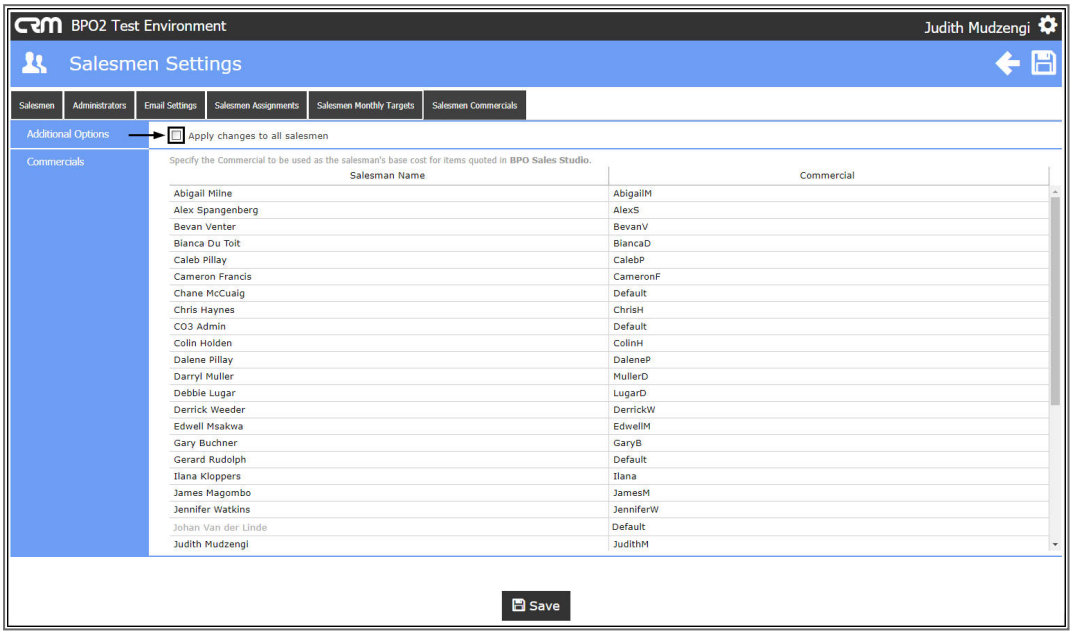
LINK A COMMERCIAL TO ALL SALESMEN

- Click on the ***Apply changes to all salesmen checkbox***.



- A message box will pop up asking you;
  - ***Are you sure you want to apply any changes you make to all salesmen? You cannot undo the changes.***
- Click on ***Ok***.

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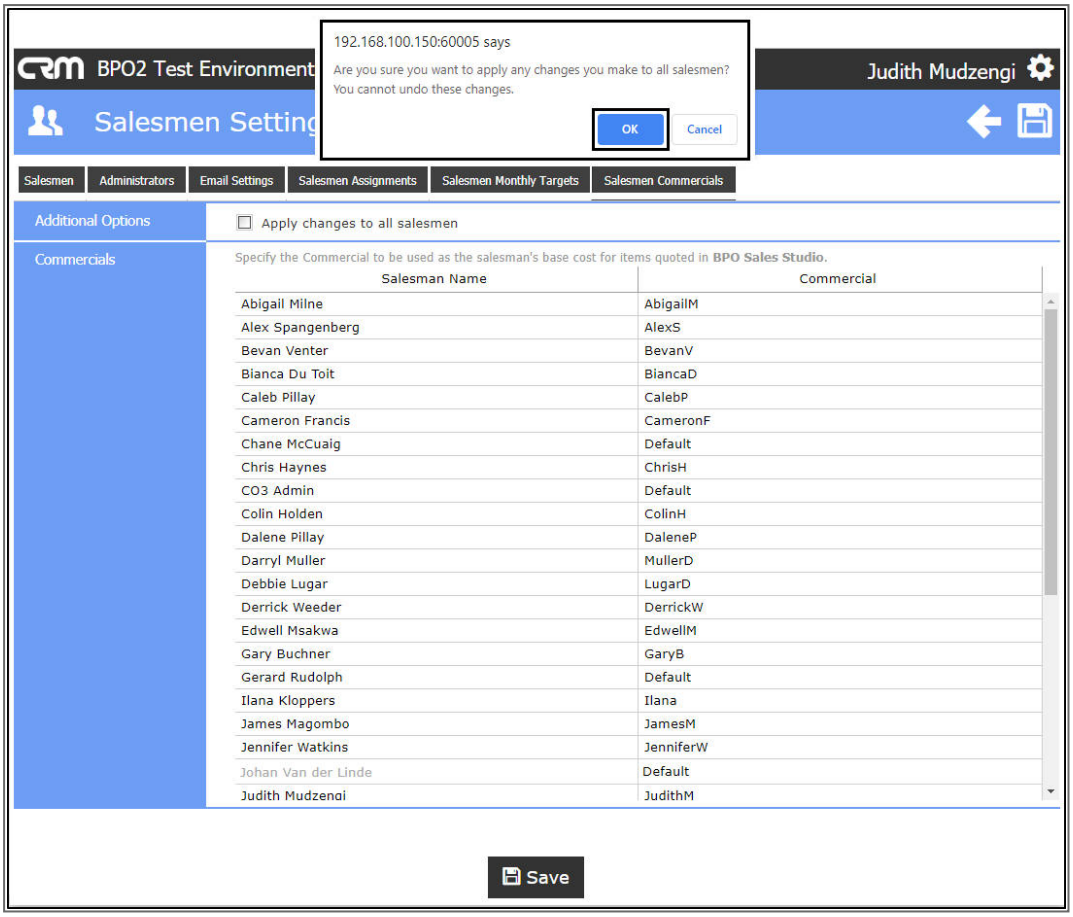

1. The ***Apply changes to all salesmen checkbox*** will become marked.
2. Click on the ***Commercial textbox*** of any Salesman.

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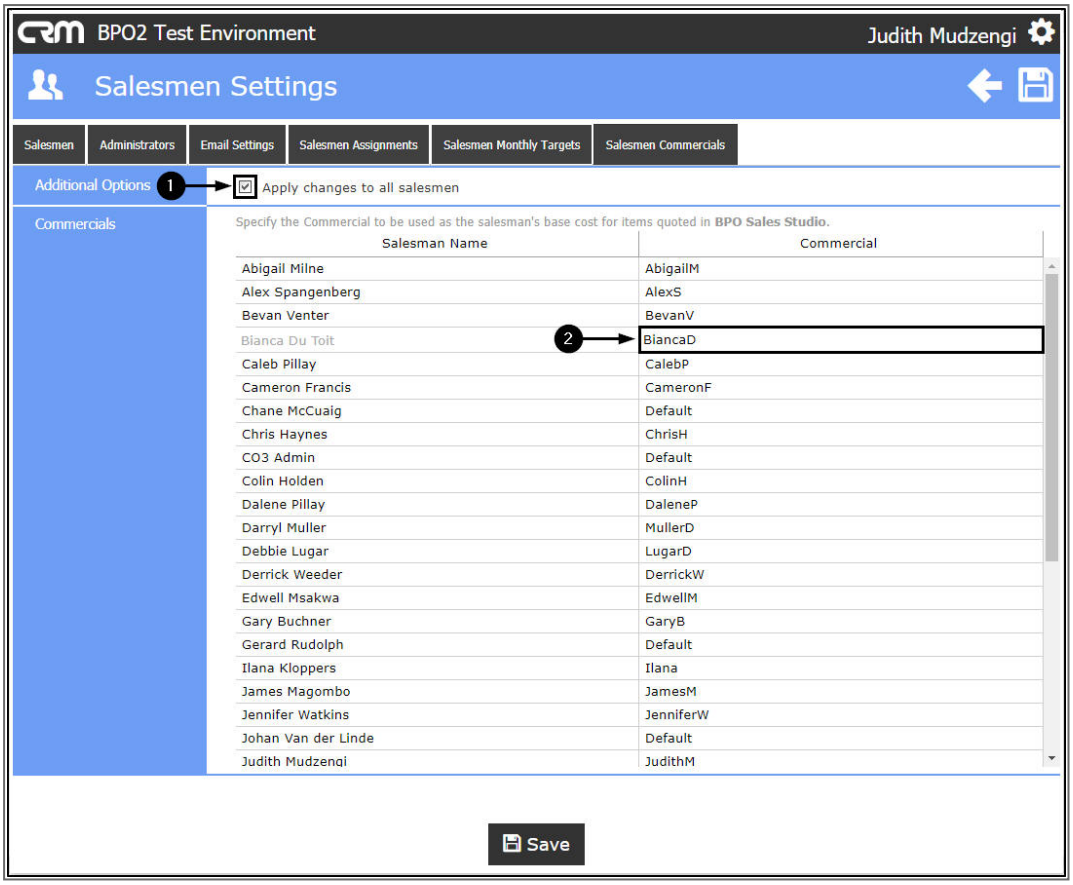

1. A ***menu*** will be displayed.
    - ***Note***: If the menu is not displayed, click on the ***Commercial textbox*** again.
2. Select the relevant commercial.
    - In this image, ***Default*** commercial has been seleccted.

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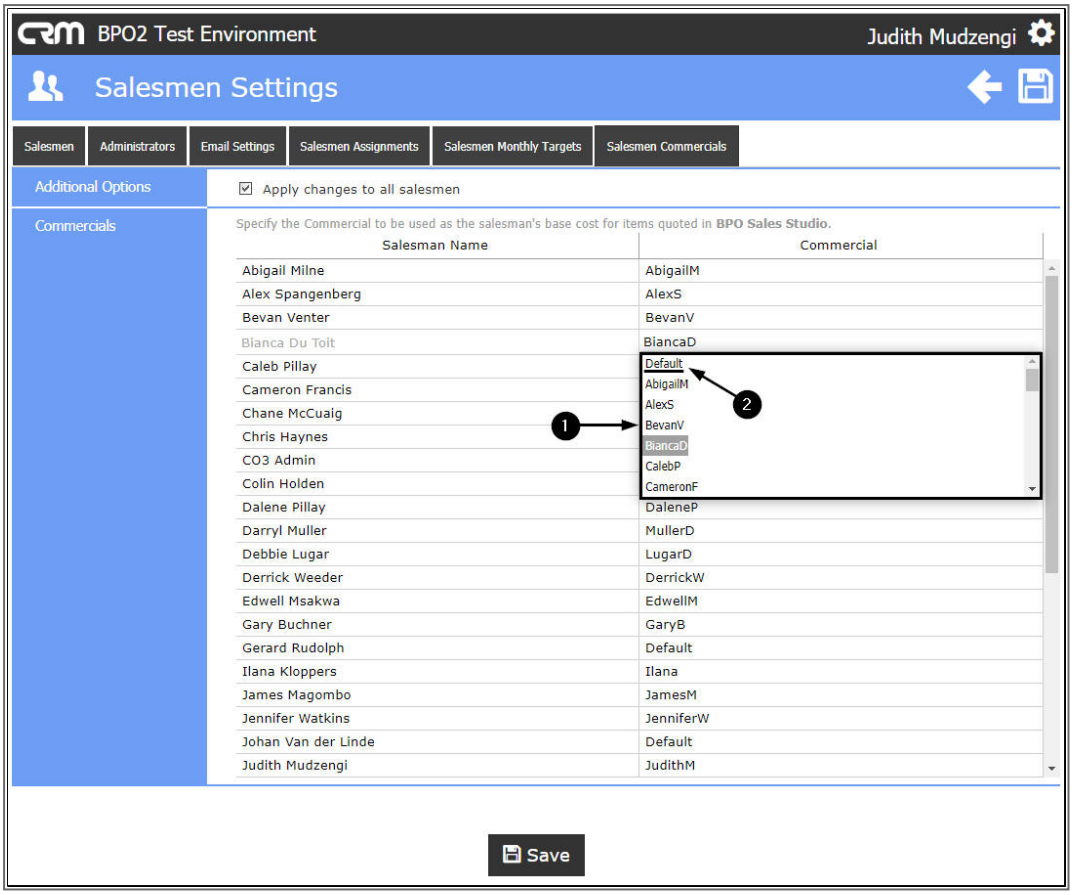

- A message box will pop up asking you;
    - ***Are you sure you want to apply any changes you make to all salesmen? You cannot undo these changes.***
- Click on ***Ok***,
- then click any where in the ***Commercial*** datagrid.

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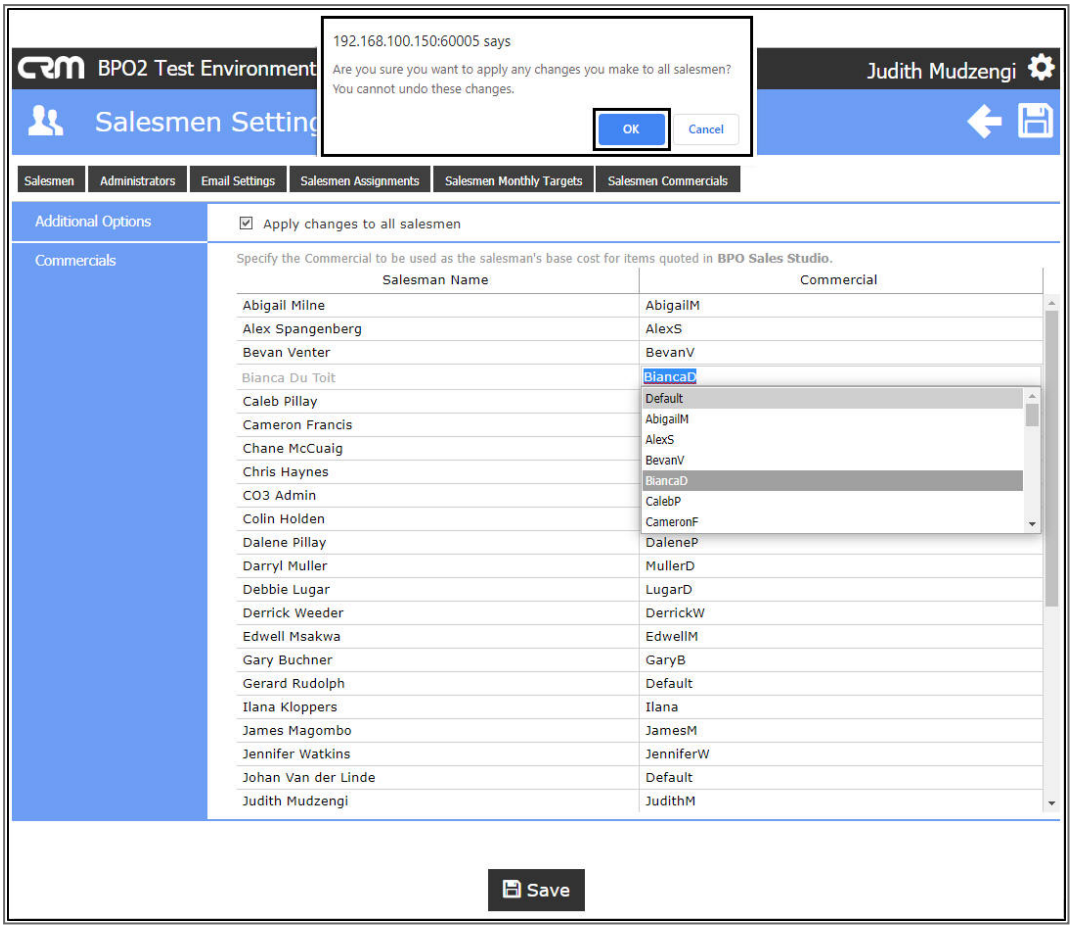

1. The selected ***Commercial*** will now be linked to all the salesmen.
2. Click on the ***Save*** button or
3. ***Save*** icon.

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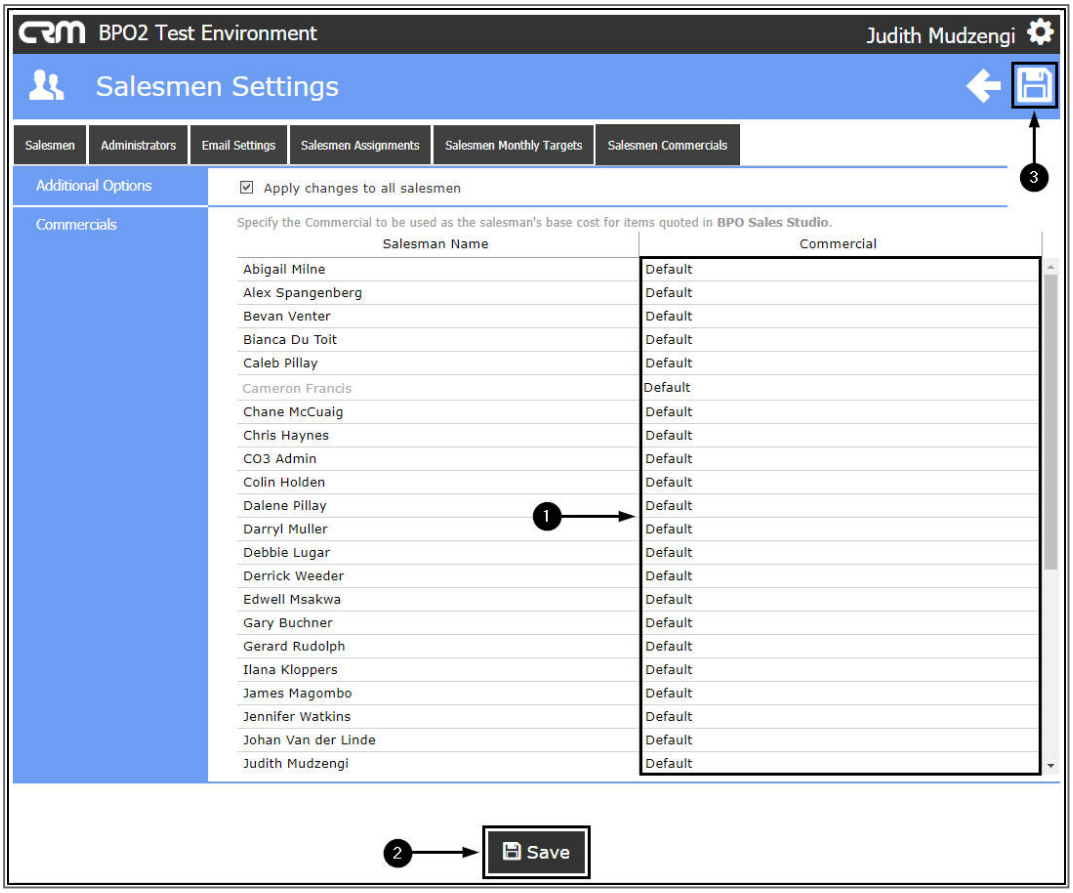

- You will return to the ***Dashboard***.

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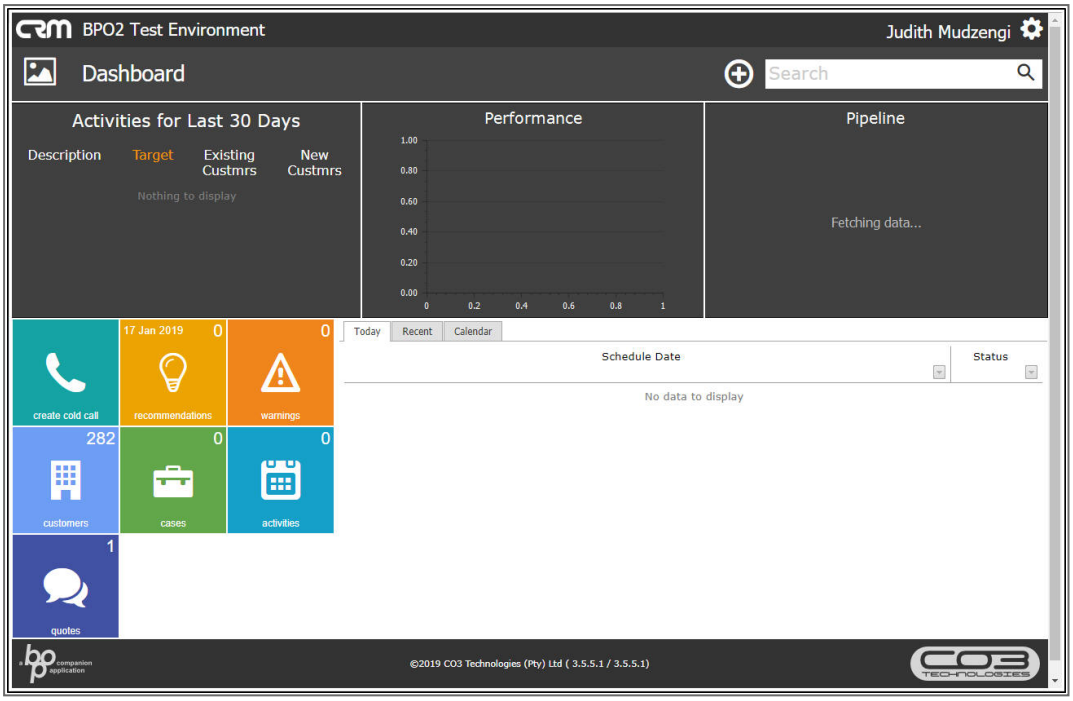

EDIT A SALESMAN COMMERCIAL

- Click on the ***Commercial textbox*** of the Salesman you wish to edit the commercial for.

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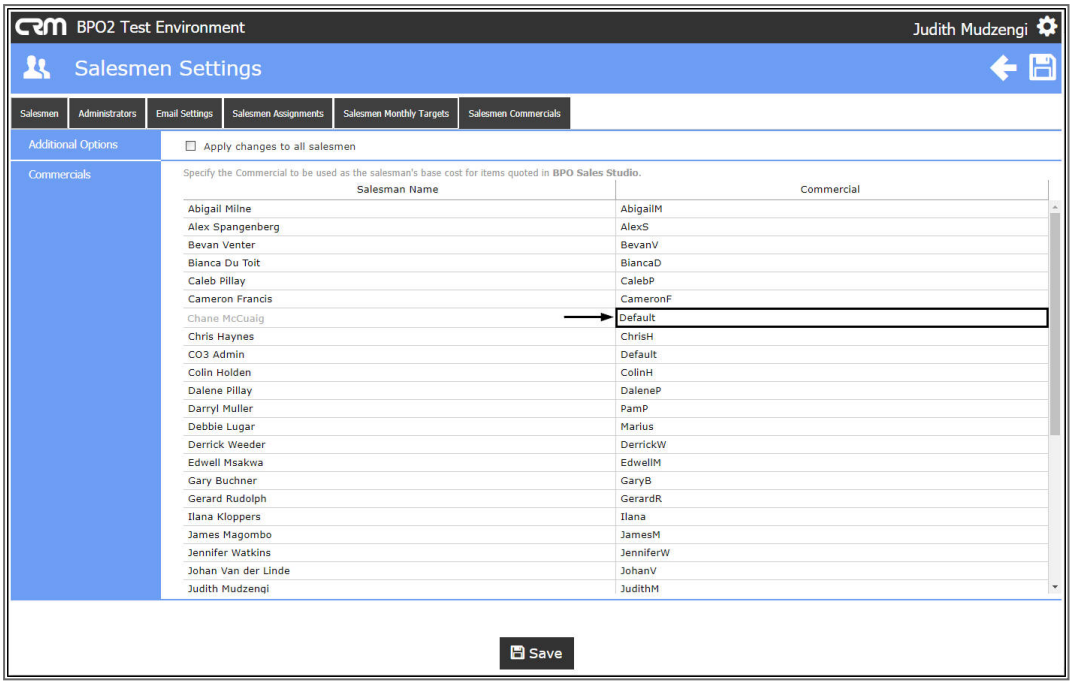

1. A ***menu*** will be displayed.
    - ***Note***: If the menu is not displayed, click on the ***Commercial textbox*** again.
2. Select the relevant commercial.
    - In this image, ***PamP*** commercial has been selected.

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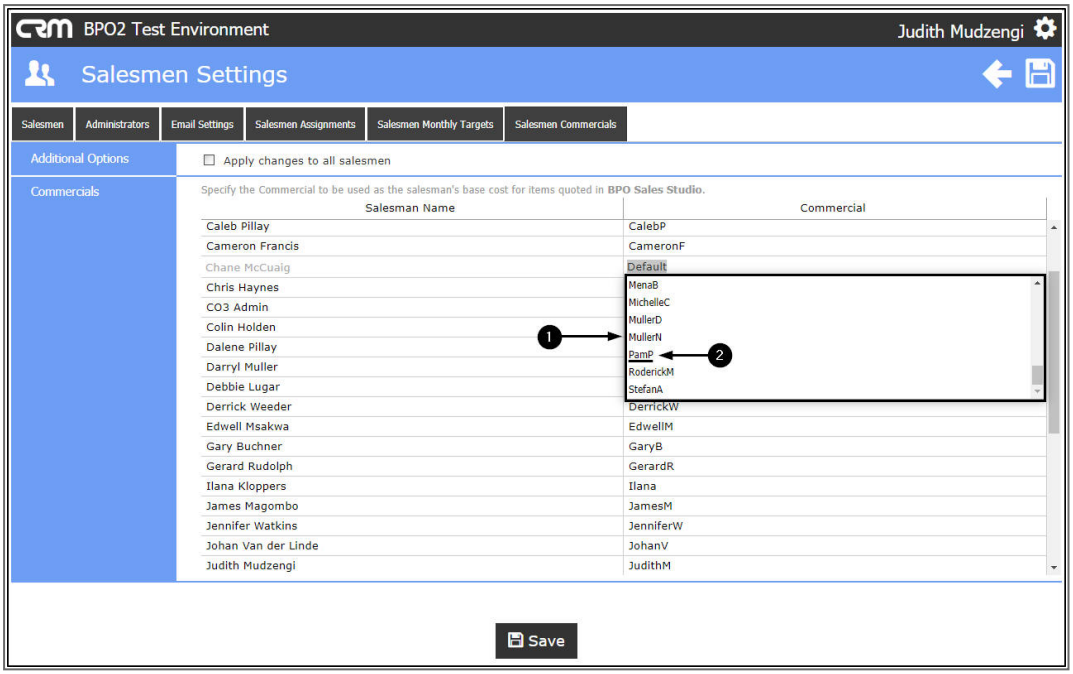

1. The ***Commercial textbox*** will now be populated with the selected commercial.
2. Click on the ***Save*** button or
3. ***Save*** icon.

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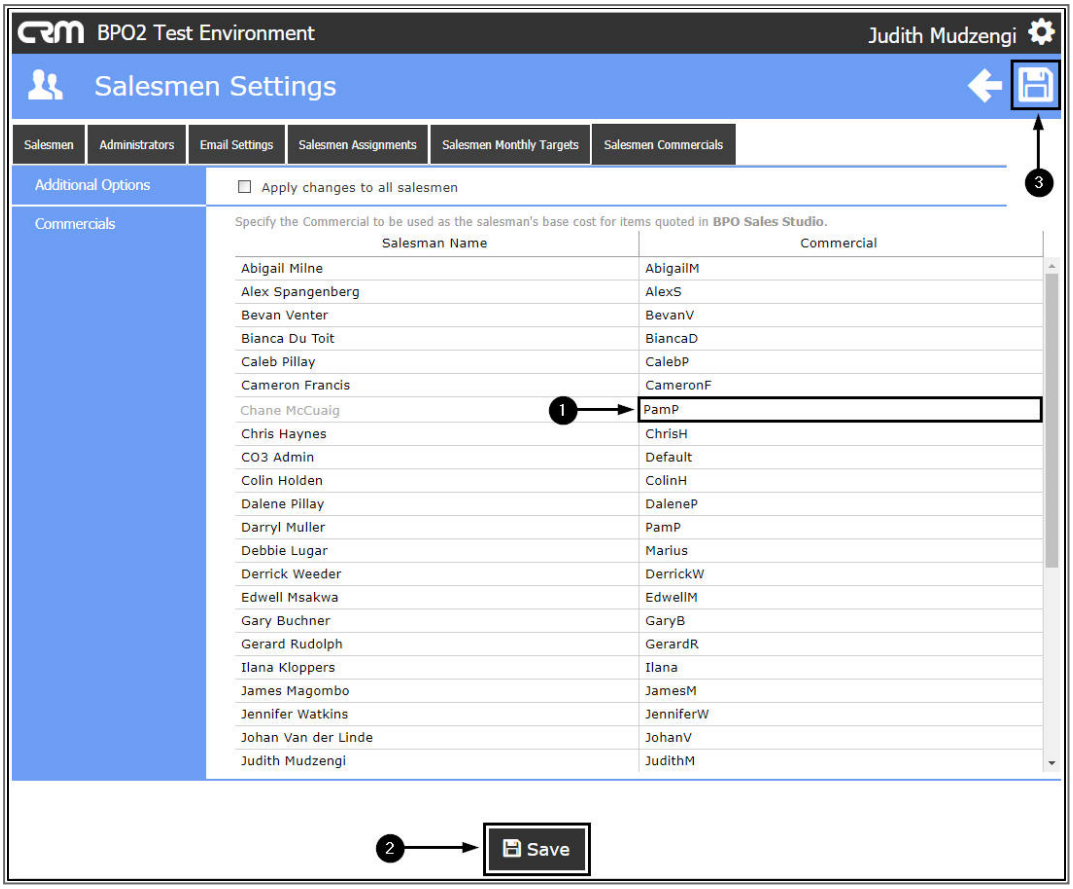

- You will return to the ***Dashboard***.

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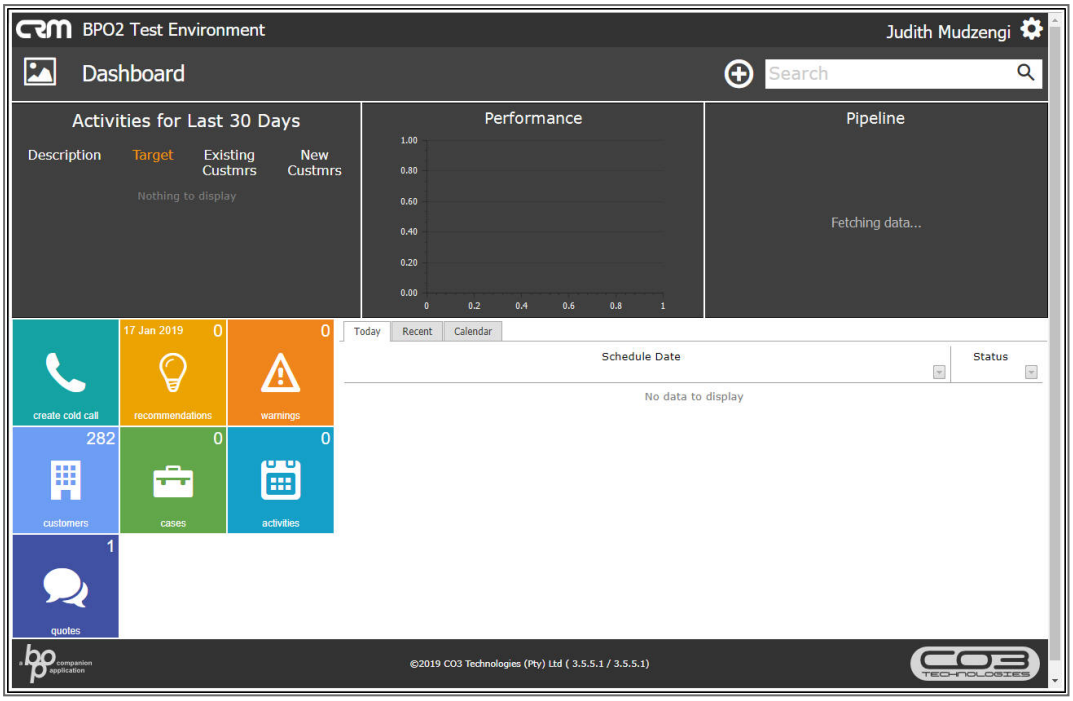

CRM.003.010

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