

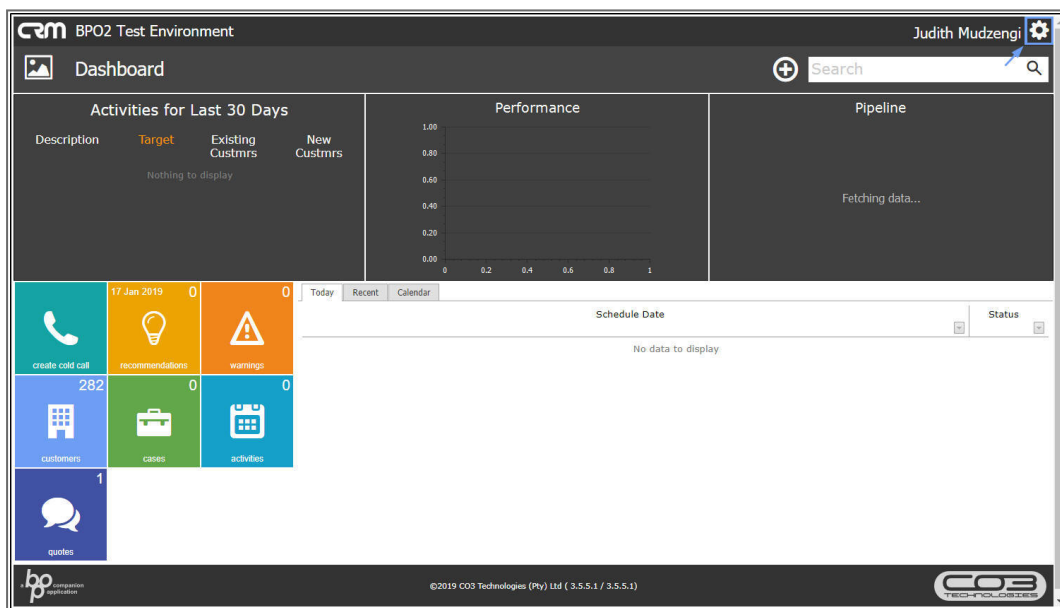
CRM SETTINGS

SALESMEN COMMERCIALS

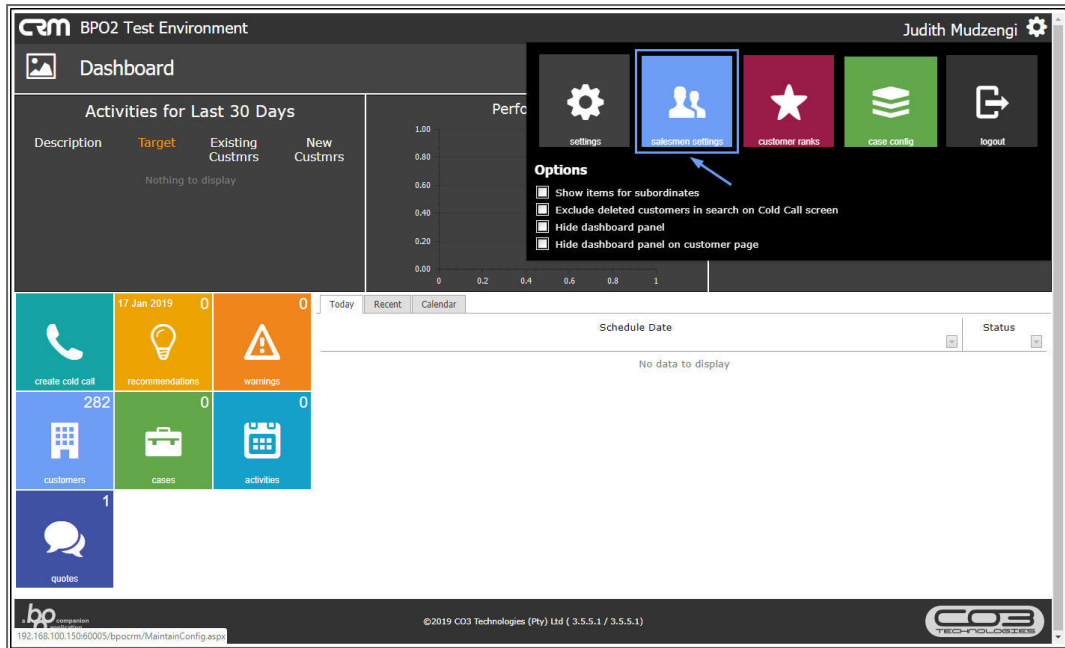
- The **Salesmen Commercials** option is for linking commercials created in **BPO** to salesmen in **CRM**.
- This will be used in **BPO Sales Studio** quotes to allocate individual salesman unit costs.

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

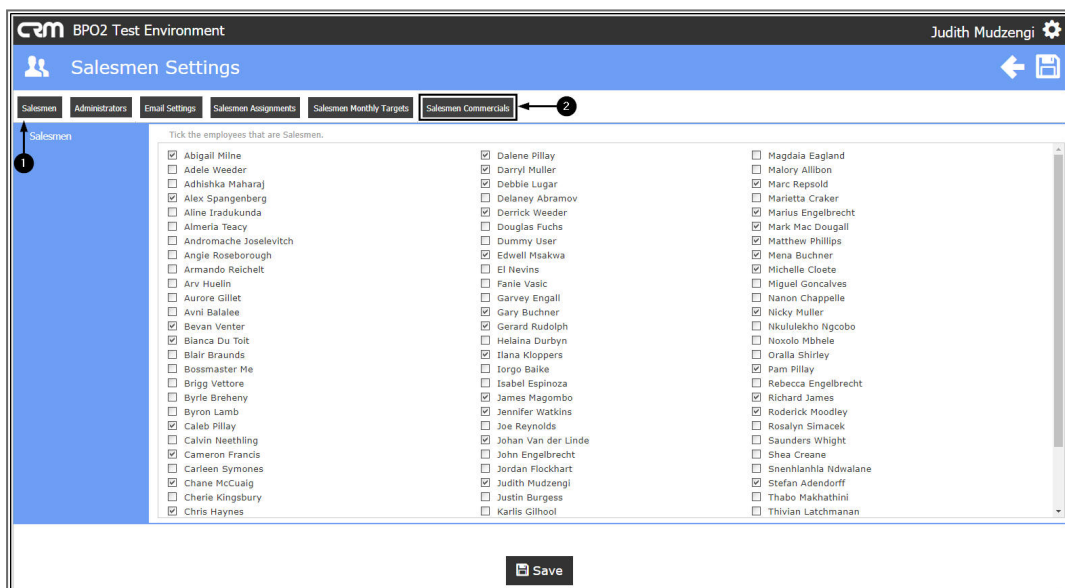
- Click on the **Settings** button to the right of your **UserName**.



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



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.

CRM BPO2 Test Environment Judith Mudzengi

Salesmen Settings

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials

Additional Options ☐ Apply changes to all salesmen

Commercials Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCualg	
Chris Haynes	ChrisH
CO3 Admin	
Colin Holden	ColinH
Dalene Pillay	DaleneP
Darryl Muller	PamP
Debbie Lugar	Marius
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	GerardR
Ilana Kloppers	Ilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	JohanV
Judith Mudzengi	JudithM
Kashmira Nirghin	KashmiraH
Kim Engelbrecht	kim
Lucky Mawaye	LuckyM

Save

Link A Commercial To A Salesman

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

CRM BPO2 Test Environment Judith Mudzengi

Salesmen Settings

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials

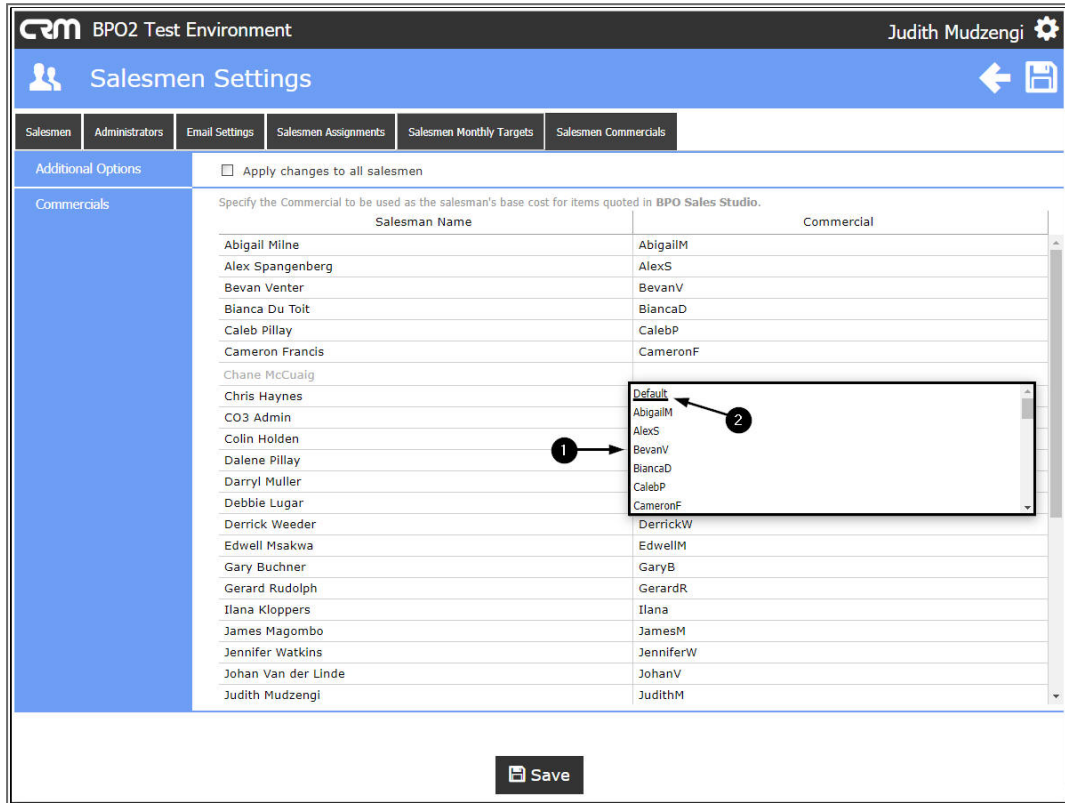
Additional Options ☐ Apply changes to all salesmen

Commercials Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Blanca Du Toit	BlancaD
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCualg	
Chris Haynes	ChrisH
CO3 Admin	
Colin Holden	ColinH
Dalene Pillay	DaleneP
Darryl Muller	PamP
Debbie Lugar	Marius
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	GerardR
Ilana Kloppers	Ilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	JohanV
Judith Mudzengi	JudithM

Save

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.



The screenshot shows the 'Salesmen Settings' interface with the 'Salesmen Commercials' tab selected. A table lists salesmen and their assigned commercial. A dropdown menu is open, showing a list of commercial options. The 'Default' option is selected, indicated by an arrow labeled '2'. Another arrow labeled '1' points to the 'Commercial' column header.

Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Bianca Du Toit	BiancaD
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCuaig	
Chris Haynes	Default
CO3 Admin	
Colin Holden	
Dalene Pillay	
Darryl Muller	
Debbie Lugar	
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	GerardR
Ilana Kloppers	Ilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	JohanV
Judith Mudzengi	JudithM

Save

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

CRM BPO2 Test Environment Judith Mudzengi

Salesmen Settings

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials

Additional Options ☐ Apply changes to all salesmen

Commercials Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Blanca Du Toit	BlancaD
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCuaig	Default
Chris Haynes	ChrisH
CO3 Admin	Default
Colin Holden	ColinH
Dalene Pillay	DaleneP
Darryl Muller	PamP
Debbie Lugar	Marius
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	GerardR
Ilana Kloppers	Ilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	JohanV
Judith Mudzengi	JudithM

Save

- You will return to the *Dashboard*.

CRM BPO2 Test Environment Judith Mudzengi

Dashboard Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Nothing to display			

Performance

Pipeline

Fetching data...

Today Recent Calendar

Schedule Date Status

No data to display

create cold call 282

recommendations 0

warnings 0

customers 282

cases 0

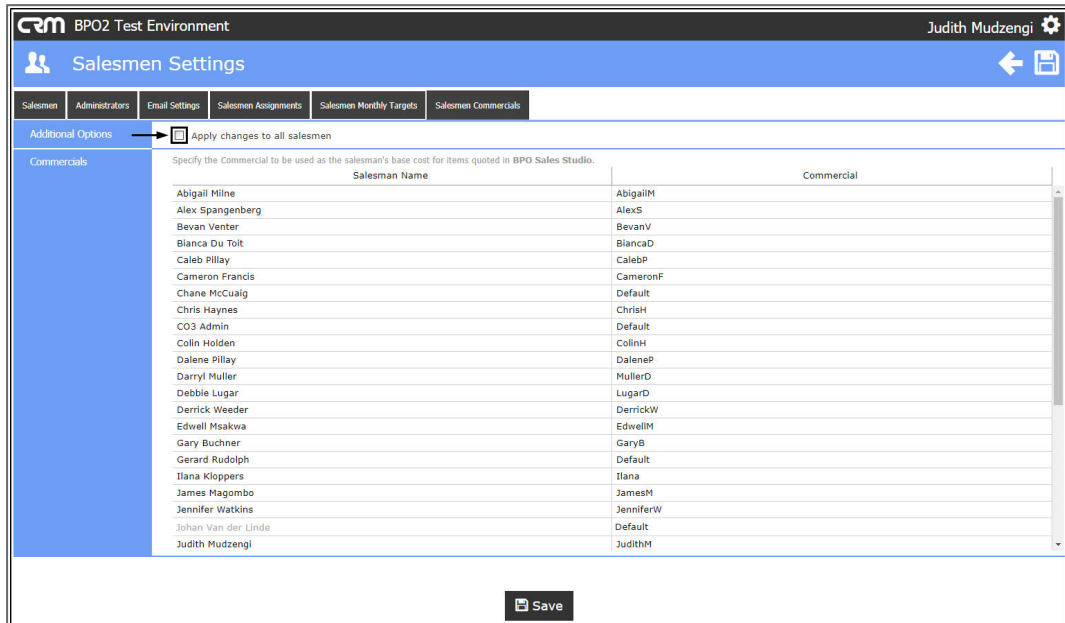
activities 0

quotes 1

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LINK A COMMERCIAL TO ALL SALESMEN

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



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Salesmen Settings

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials

Additional Options ☒ Apply changes to all salesmen


Commercials

Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Abigail Milne	AbigailIM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Blanca Du Toit	BlancaD
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCualig	Default
Chris Haynes	ChrisH
CO3 Admin	Default
Colin Holden	ColinH
Dalene Pillay	DaleneP
Darryl Muller	MullerD
Debbie Lugar	LugarD
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellIM
Gary Buchner	GaryB
Gerard Rudolph	Default
Ivana Kloppers	Ivana
James Mgombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	Default
Judith Mudzengi	JudithM

Save


- 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**.



BPO2 Test Environment



192.168.100.150:60005 says
Are you sure you want to apply any changes you make to all salesmen?
You cannot undo these changes.

OK

Cancel

Judith Mudzengi 


Salesmen Setting

Salesmen

Administrators

Email Settings

Salesmen Assignments

Salesmen Monthly Targets

Salesmen Commercials

Commercials

Additional Options


☐ Apply changes to all salesmen


Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.



Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Bianca Du Toit	BiancaD
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCuaig	Default
Chris Haynes	ChrisH
CO3 Admin	Default
Colin Holden	ColinH
Dalene Pillay	DaleneP
Darryl Muller	MullerD
Debbie Lugar	LugarD
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	Default
Iilana Kloppers	Iilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	Default
Judith Mudzenoi	JudithM

Save

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


BPO2 Test Environment

Judith Mudzengi


Salesmen Settings




Salesmen
Administrators
Email Settings
Salesmen Assignments
Salesmen Monthly Targets
Salesmen Commercials

Additional Options
1
☒ Apply changes to all salesmen

Commercials

Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Bianca Du Toit	BiancaD
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCuaig	Default
Chris Haynes	ChrisH
CO3 Admin	Default
Colin Holden	ColinH
Dalene Pillay	DaleneP
Darryl Muller	MullerD
Debbie Lugar	LugarD
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	Default
Ilana Kloppers	Ilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	Default
Judith Mudzengi	JudithM


 Save


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.


BPO2 Test Environment

Judith Mudzengi


Salesmen Settings



Salesmen
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Salesmen Monthly Targets
Salesmen Commercials


Additional Options

☒ Apply changes to all salesmen


Commercials

Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Bianca Du Toit	BiancaD
Caleb Pillay	Default
Cameron Francis	AbigailM
Chane McCualg	AlexS
Chris Haynes	BevanV
CO3 Admin	BiancaD
Colin Holden	CalebP
CameronF	CameronF
Dalene Pillay	DaleneP
Darryl Muller	MullerD
Debbie Lugar	LugarD
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	Default
Ilana Kloppers	Ilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	Default
Judith Mudzengi	JudithM

 Save


- 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.


 **BPO2 Test Environment**



192.168.100.150:60005 says

Are you sure you want to apply any changes you make to all salesmen?
You cannot undo these changes.

OK
Cancel

Judith Mudzengi 

 **Salesmen Settings**

Salesmen

Administrators

Email Settings

Salesmen Assignments

Salesmen Monthly Targets

Salesmen Commercials

Additional Options

Commercials


☒ Apply changes to all salesmen


Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.



Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Bianca Du Toit	BiancaD
Caleb Pillay	Default
Cameron Francis	AbigailM
Chane McCuaig	AlexS
Chris Haynes	BevanV
CO3 Admin	BiancaD
Colin Holden	CalebP
Dalene Pillay	CameronF
Darryl Muller	DaleneP
Debbie Lugar	MullerD
Derrick Weeder	LugarD
Edwell Msakwa	DerrickW
Gary Buchner	EdwellM
Gerard Rudolph	GaryB
Ilana Kloppers	Default
James Magombo	Ilana
Jennifer Watkins	JamesM
Johan Van der Linde	JenniferW
Judith Mudzengi	Default
	JudithM

Save

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


BPO2 Test Environment

Judith Mudzengi


Salesmen Settings



Salesmen
Administrators
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Salesmen Commercials

Additional Options

☒ Apply changes to all salesmen

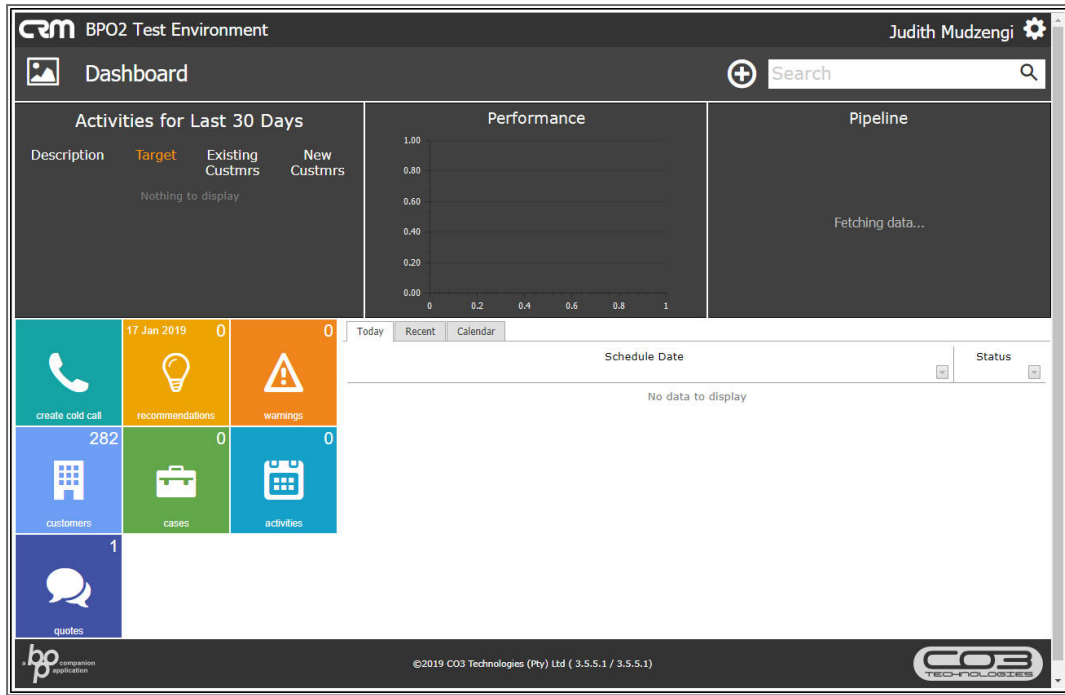
Commercials

Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Abigail Milne	Default
Alex Spangenberg	Default
Bevan Venter	Default
Blanca Du Toit	Default
Caleb Pillay	Default
Cameron Francis	Default
Chane McCualg	Default
Chris Haynes	Default
CO3 Admin	Default
Colin Holden	Default
Dalene Pillay	Default
Darryl Muller	Default
Debbie Lugar	Default
Derrick Weeder	Default
Edwell Msakwa	Default
Gary Buchner	Default
Gerard Rudolph	Default
Ilana Kloppers	Default
James Magombo	Default
Jennifer Watkins	Default
Johan Van der Linde	Default
Judith Mudzengi	Default


 Save


- You will return to the *Dashboard*.



EDIT A SALESMAN COMMERCIAL

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

 BPO2 Test Environment
 Judith Mudzengi

 Salesmen Settings

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Salesmen Monthly Targets

Salesmen Commercials

Additional Options

☐ Apply changes to all salesmen

Commercials

Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Blanca Du Toit	BlancaD
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCuaig	Default
Chris Haynes	Christ
CO3 Admin	Default
Colin Holden	ColinH
Dalene Pillay	DaleneP
Darryl Muller	PamP
Debbie Lugar	Marius
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	GerardR
Ilana Kloppers	Ilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	JohanV
Judith Mudzengi	JudithM

Save

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.

CRM BPO2 Test Environment

Judith Mudzengi

Salesmen Settings

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Salesmen Monthly Targets
Salesmen Commercials

Additional Options

☐ Apply changes to all salesmen


Commercials


Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.



Salesman Name	Commercial
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCuaig	Default
Chris Haynes	MenAB
CO3 Admin	MichelleC
Colin Holden	MullerD
Dalene Pillay	MullerN
Darryl Muller	PamP
Debbie Lugar	RoderickM
Derrick Weeder	StefanA
Edwell Msakwa	DerrickW
Gary Buchner	EdwellM
Gerard Rudolph	GaryB
Ilana Kloppers	GerardR
James Magombo	Ilana
Jennifer Watkins	JamesM
Johan Van der Linde	JenniferW
Judith Mudzengi	JohanV
	JudithM

Save

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


BPO2 Test Environment

Judith Mudzengi


Salesmen Settings



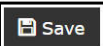
Salesmen
Administrators
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Salesmen Assignments
Salesmen Monthly Targets
Salesmen Commercials

Additional Options
☐ Apply changes to all salesmen

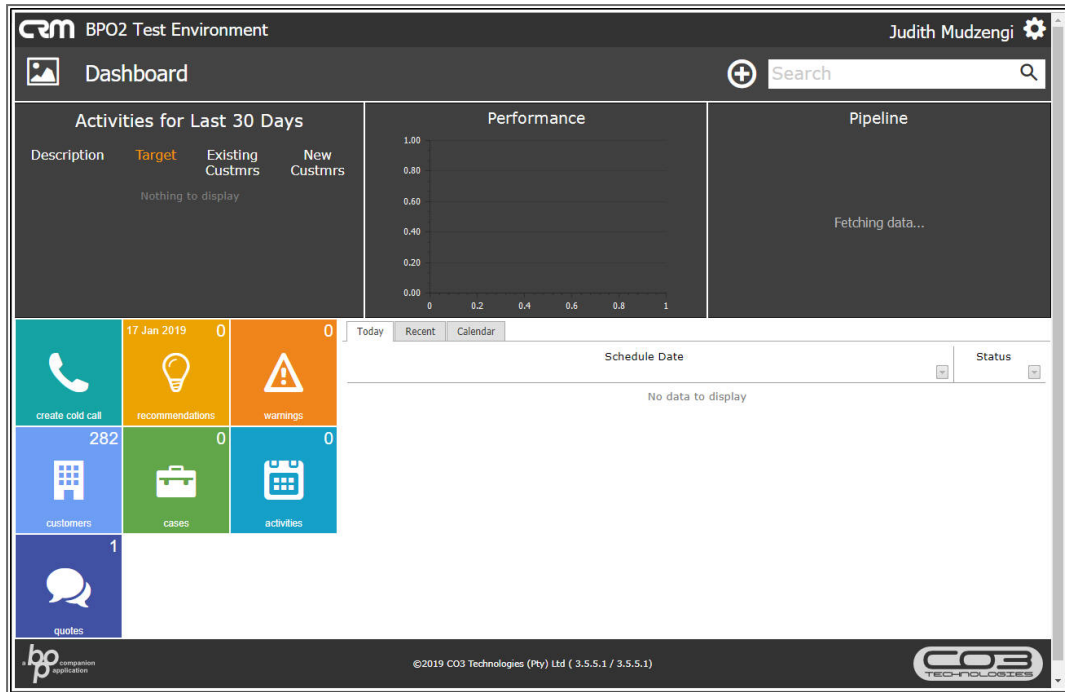
Commercials

Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Bianca Du Toit	BiancaD
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCuaig	PamP
Chris Haynes	ChrisH
CO3 Admin	Default
Colin Holden	ColinH
Dalene Pillay	DaleneP
Darryl Muller	PamP
Debbie Lugar	Marius
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	GerardR
Ilana Kloppers	Ilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	JohanV
Judith Mudzengi	JudithM



- You will return to the *Dashboard*.



CRM.003.010