We are currently updating our site; thank you for your patience.

CRM SETTINGS

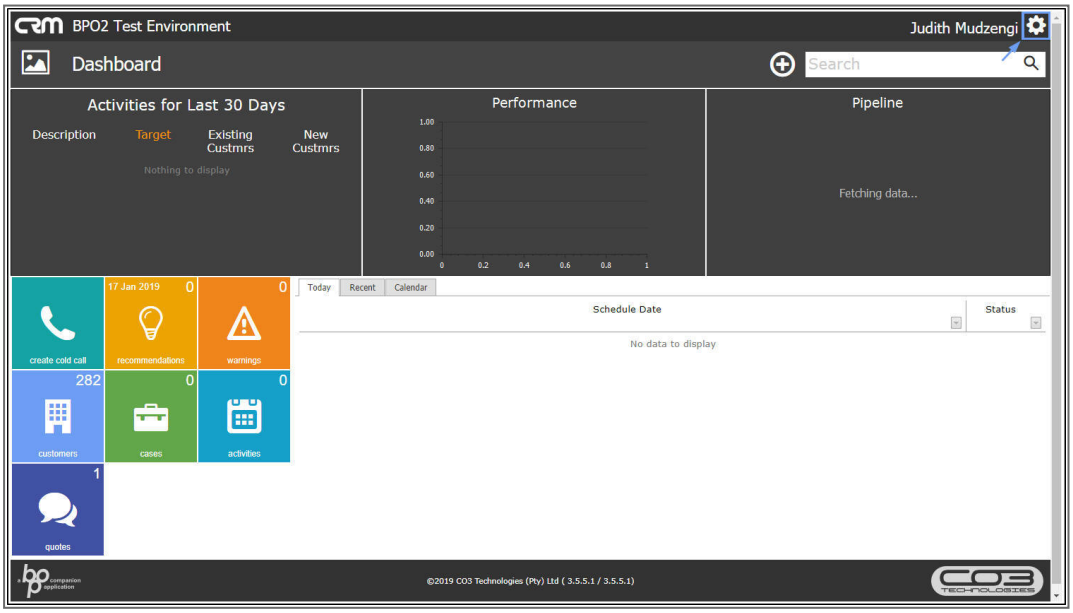
SALESMEN TARGETS

- Salesman Targets are required for the Activity Target vs Actual (Salesman Target Types and default value for Salesman Activity Target vs Actual chart) and Sales Performance Charts (Sales Performance chart - Salesman Target defaults) in BPOCRM.
- When a new salesman is created, the salesman targets will be configured with the defaults as set up on the target types.
- Salesman Targets can be updated per salesman, or globally across multiple salesmen.

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

---

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



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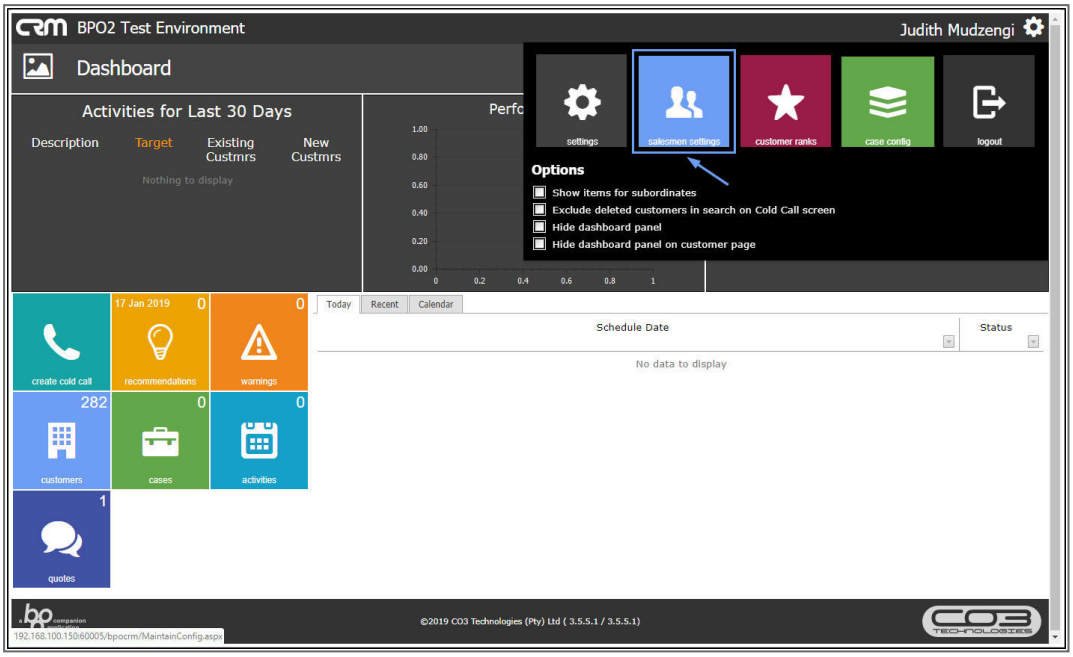
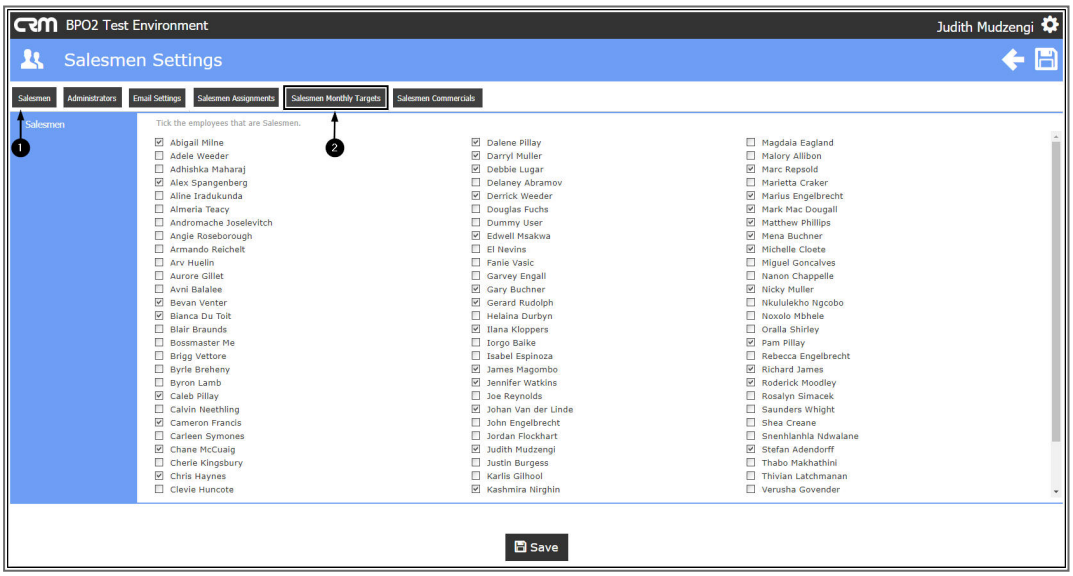
- The session **Options** page will pop up.
- Click on the **Salesmen Settings** tile.



1. The **Salesmen** tab is selected by default.
2. Click on the **Salesman Monthly Targets** tab.



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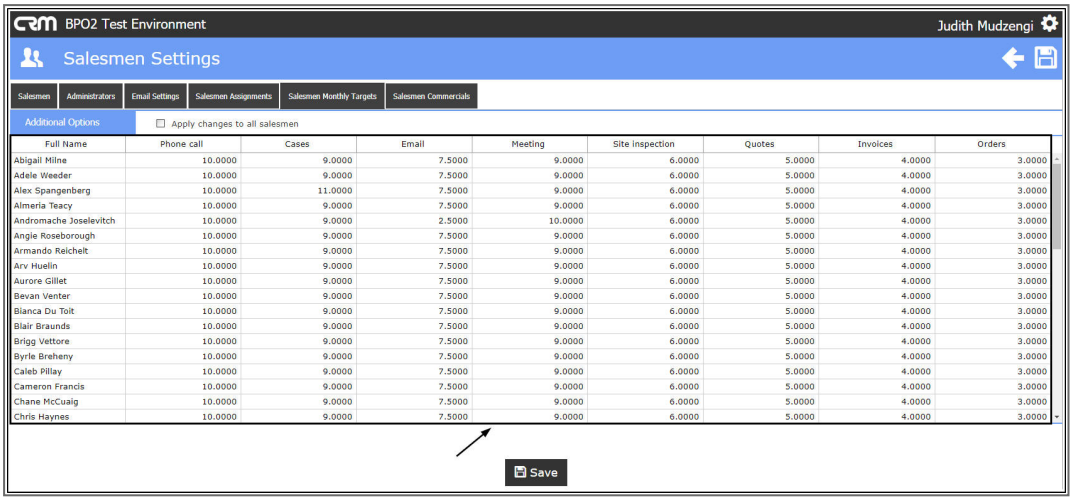
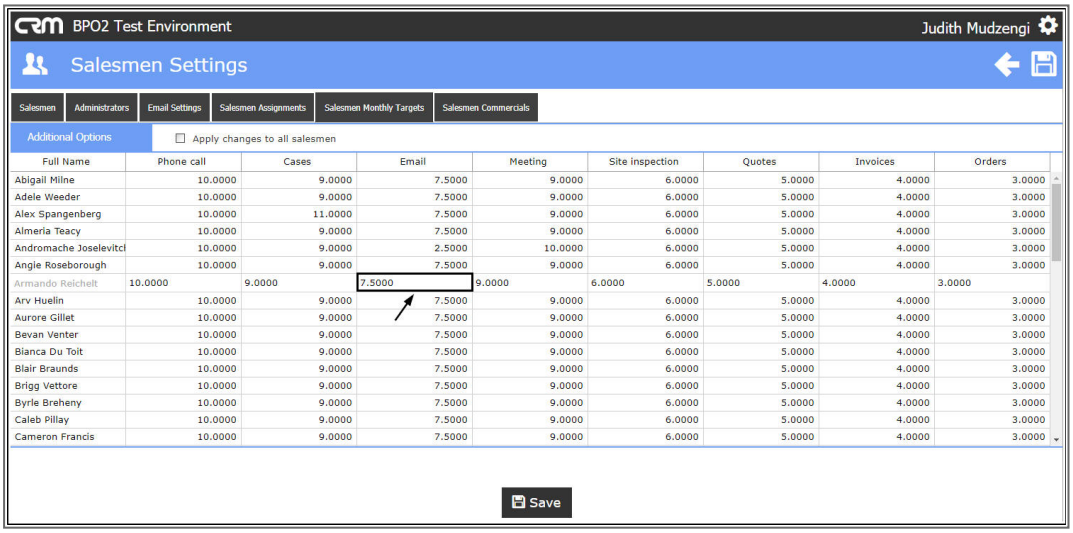
- A list of Salesmen with their Targets will be displayed.



UPDATING INDIVIDUAL SALESMAN TARGETS

- You can update an individual salesman's target.
- Click on the **textbox** of the salesman's target you wish to update.



- Update the value.

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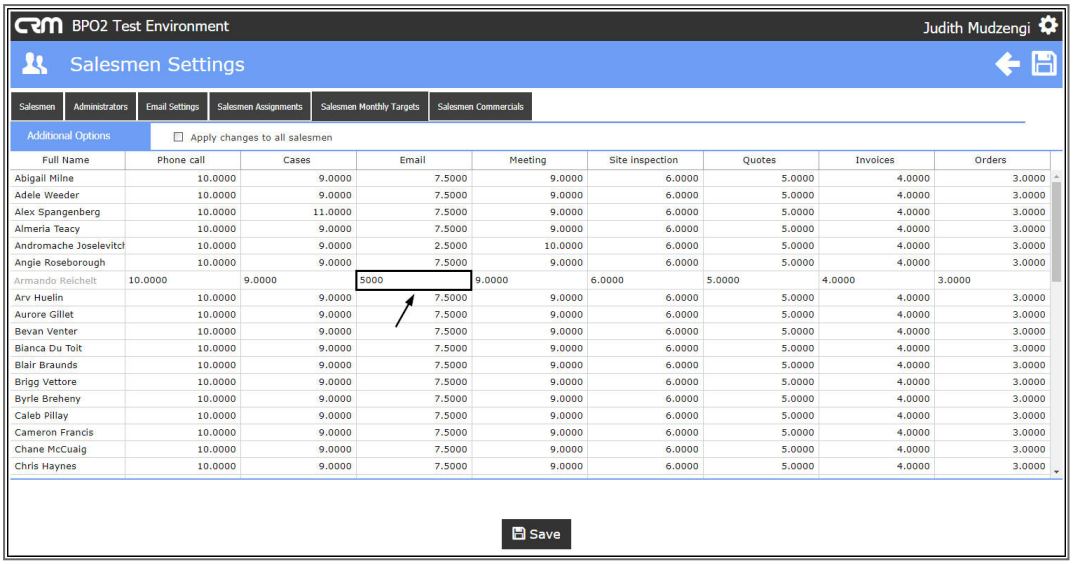
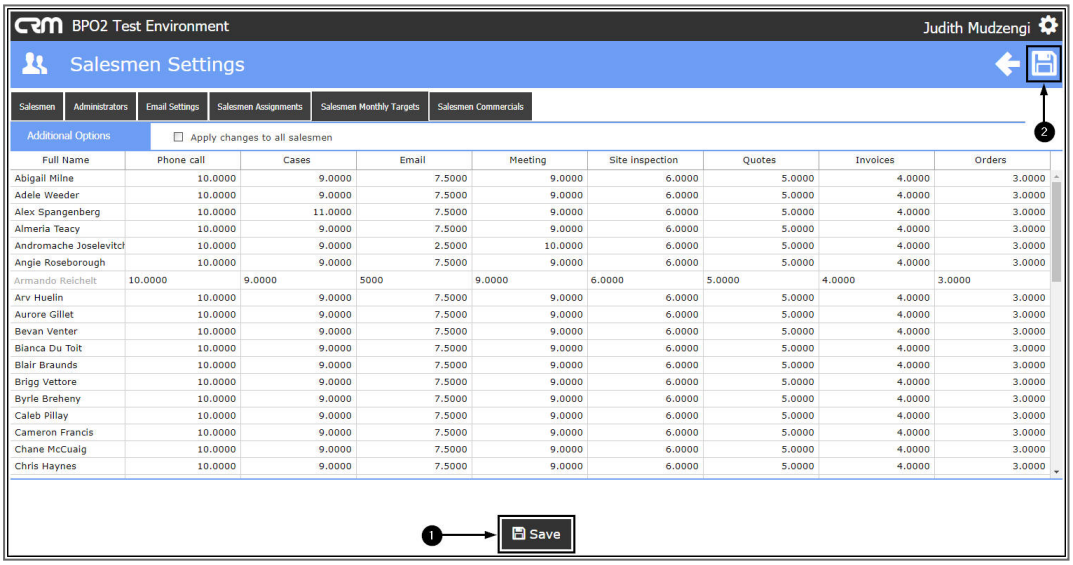


1. When you have completed the required changes, click on the **Save** button or
2. **Save** icon.



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

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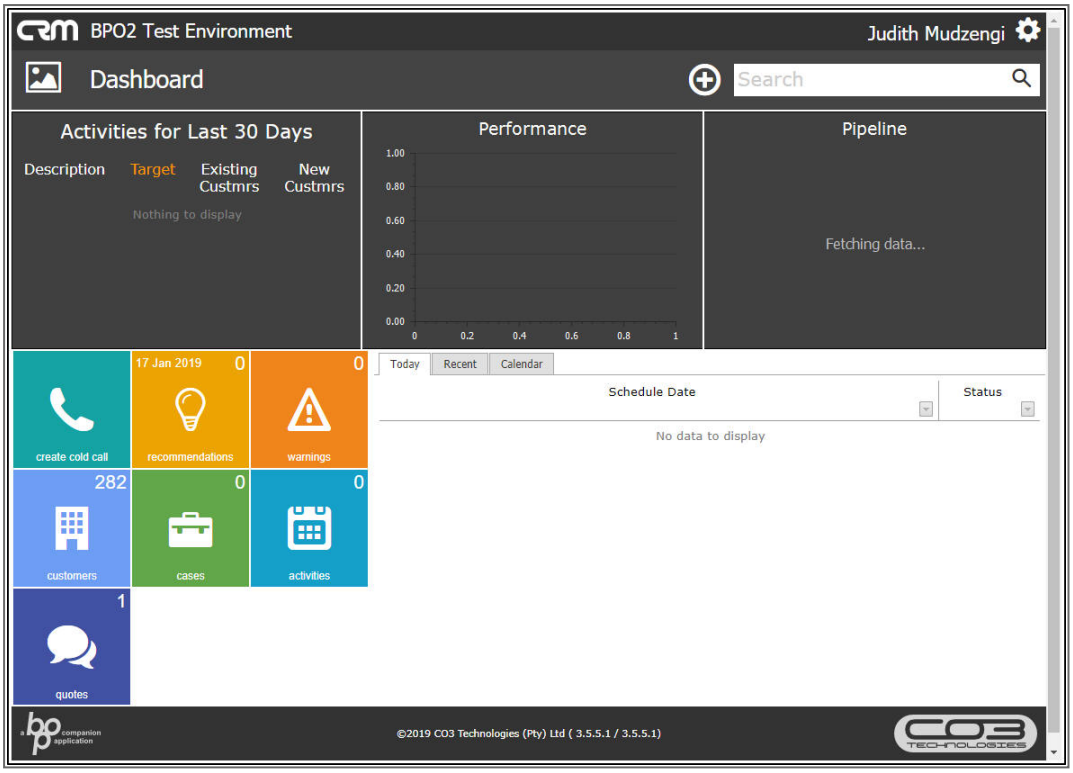

APPLYING CHANGES ACROSS MULTIPLE SALESMEN

- If you want your changes to be applied across multiple salesmen, click on the **Apply changes to all salesmen checkbox**.

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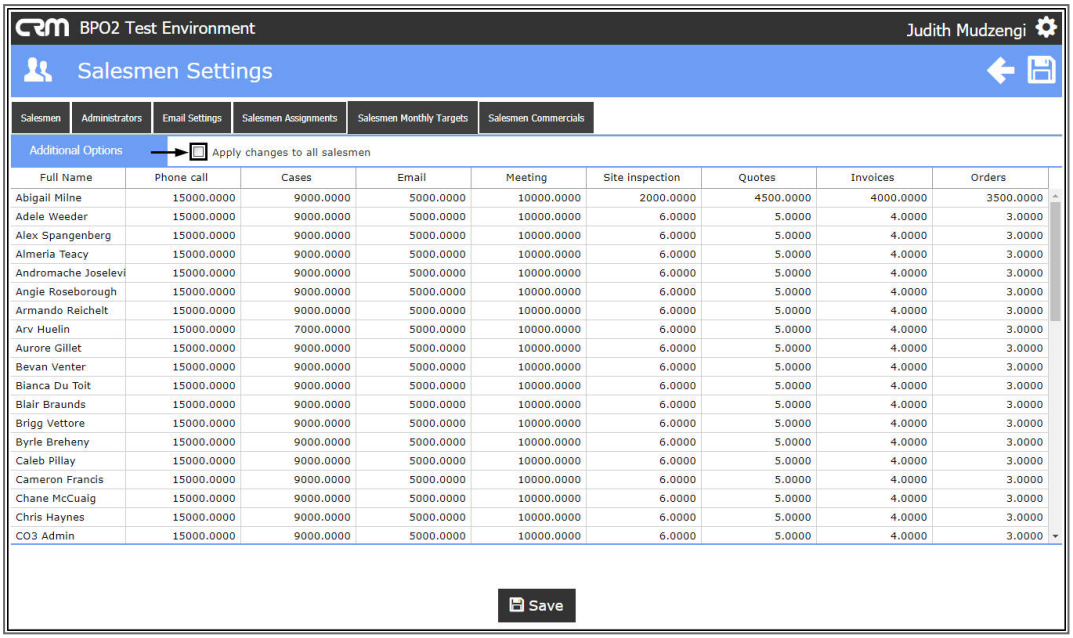
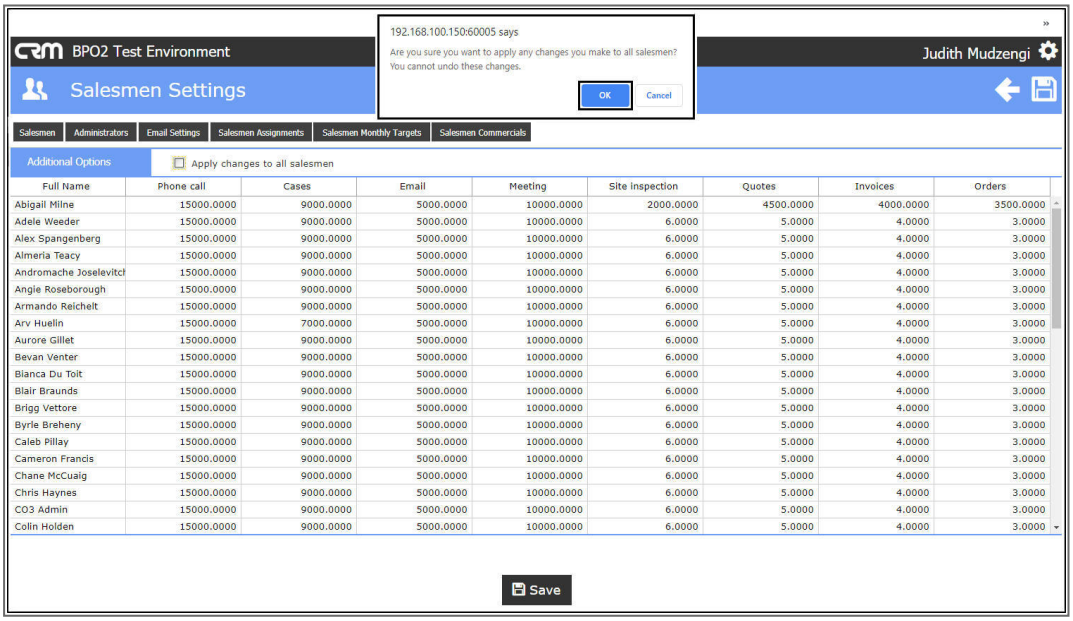


- A message box will pop up asking you;
    - **Are you sure you want to apply any changes you make to all salesmen? You cannot undo these changes.**
- Click on **Ok**.



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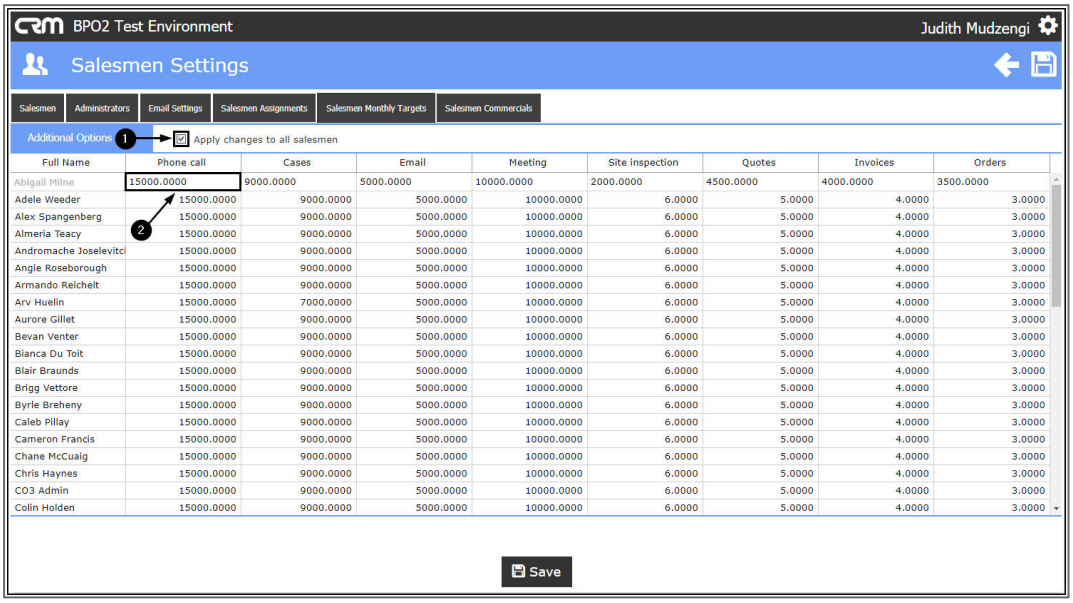
1. The **Apply changes to all salesmen checkbox** will become marked.
2. Click on any **textbox** of the Target type you wish to update.



Full Name	Phone call	Cases	Email	Meeting	Site inspection	Quotes	Invoices	Orders
Abigail Milne	15000.0000	9000.0000	5000.0000	10000.0000	2000.0000	4500.0000	4000.0000	3500.0000
Adele Weeder	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Alex Spangenberg	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Almeria Teacy	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Andromache Joselevitch	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Angie Roseborough	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Armando Reichelt	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Arv Huelin	15000.0000	7000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Aurore Gillet	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Bevan Venter	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Bianca Du Toit	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Blair Braunds	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Brigg Vettore	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Byrle Breheny	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Caleb Pillay	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Cameron Francis	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Chane McCuaig	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Chris Haynes	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
CO3 Admin	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Colin Holden	15000.0000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000

1. Make the relevant changes and click away from the **textbox**.
2. 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.**
3. Click on **Ok**.

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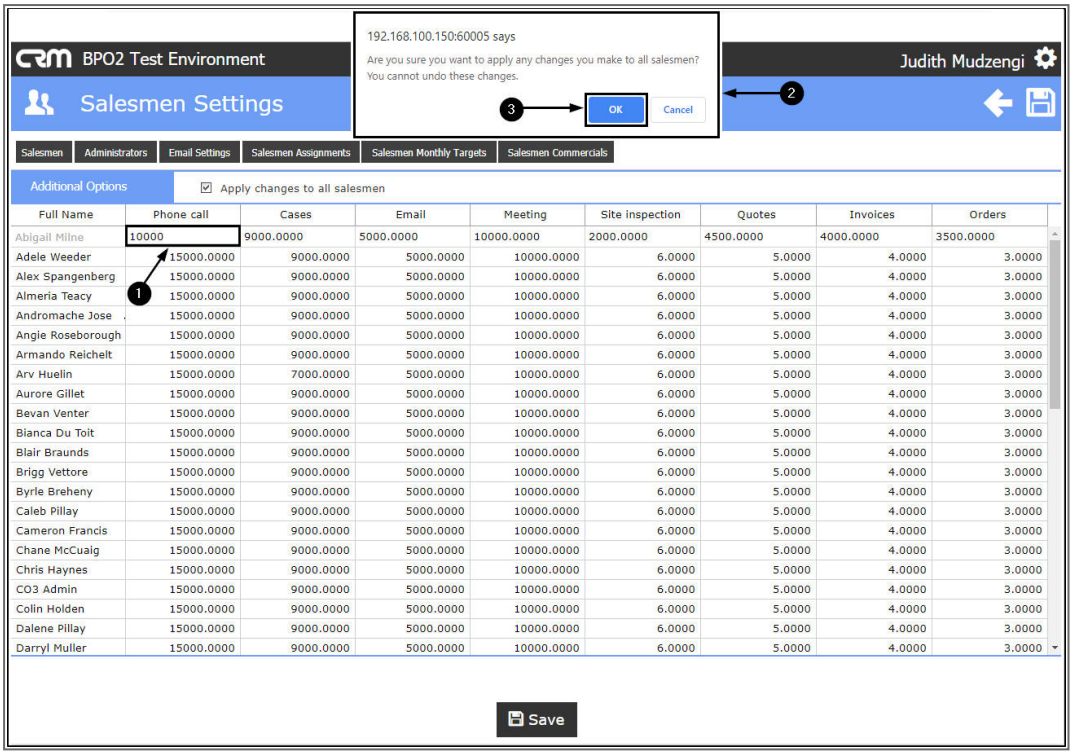
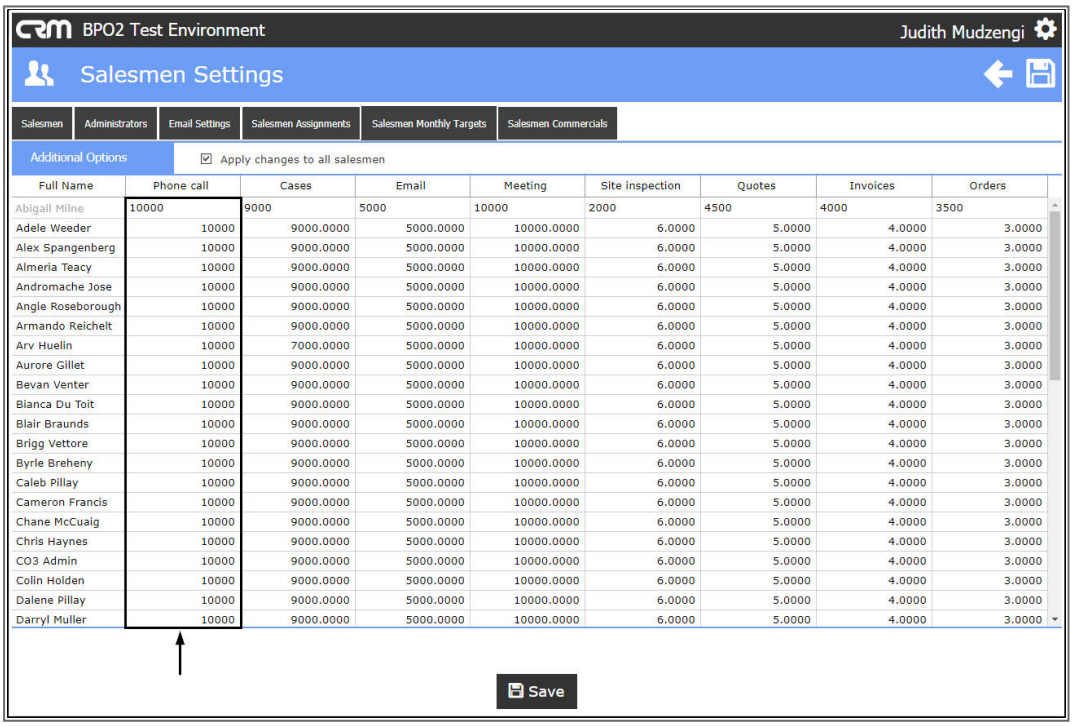


- The changes will be applied across all salesmen.



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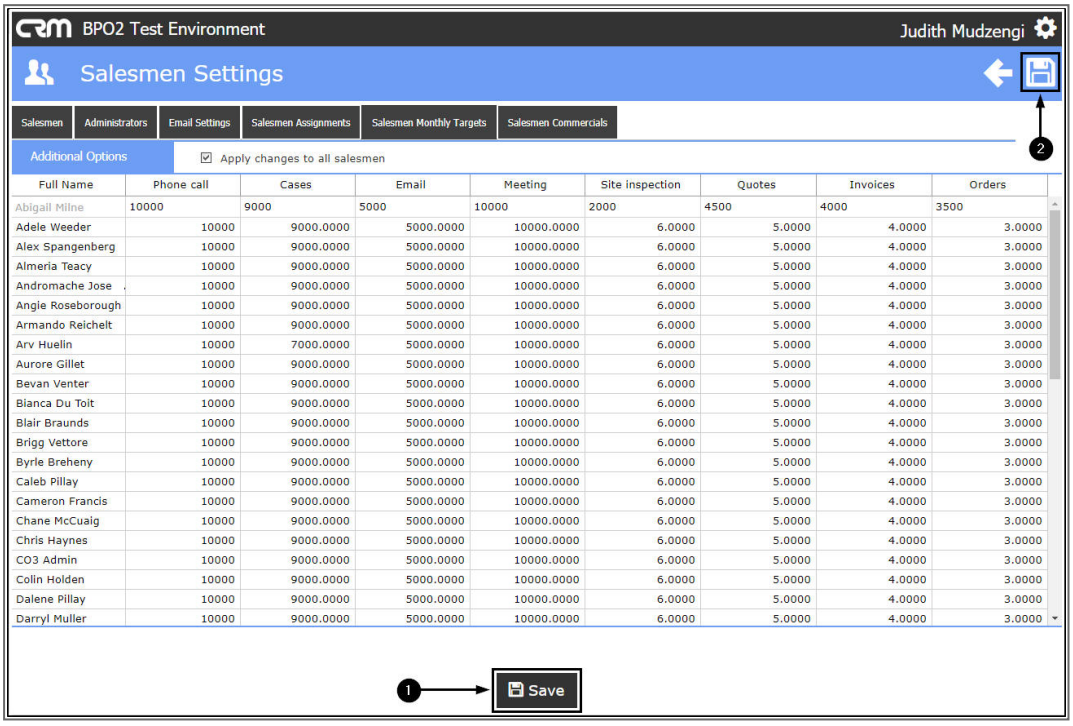
- Once you are done with all updates,
  1. click on the **Save** button or
  2. **Save** icon.



Full Name	Phone call	Cases	Email	Meeting	Site inspection	Quotes	Invoices	Orders
Abigail Milne	10000	9000	5000	10000	2000	4500	4000	3500
Adele Weeder	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
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Almeria Teacy	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Andromache Jose	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Angie Roseborough	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Armando Reichelt	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Arv Huelin	10000	7000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Aurore Gillet	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Bevan Venter	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Bianca Du Toit	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Blair Braunds	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Brigg Vettore	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Byrle Breheny	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Caleb Pillay	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Cameron Francis	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Chane McCuaig	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Chris Haynes	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
CO3 Admin	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Colin Holden	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Dalene Pillay	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000
Darryl Muller	10000	9000.0000	5000.0000	10000.0000	6.0000	5.0000	4.0000	3.0000

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

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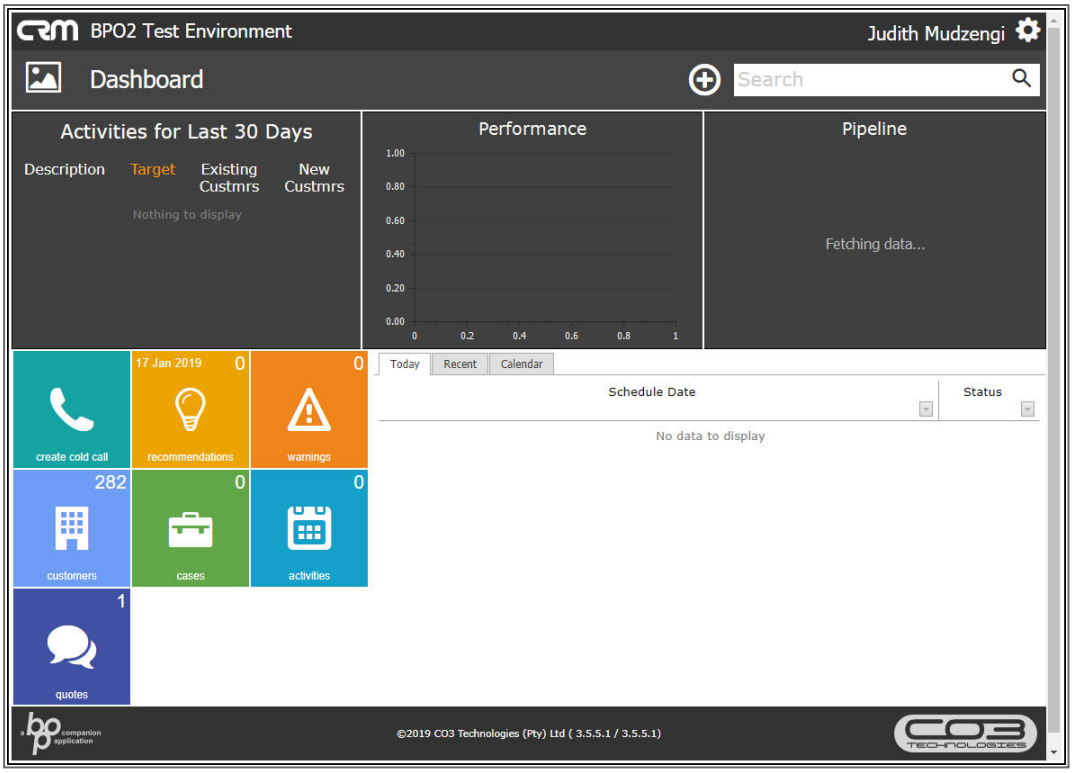

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