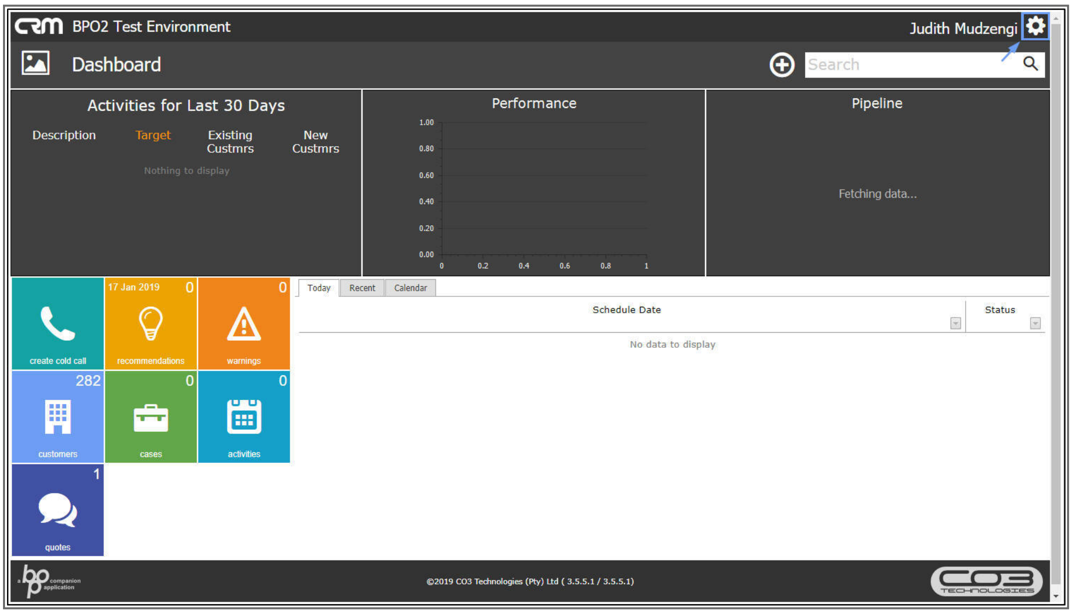
CRM SETTINGS

SALESMEN SETTINGS

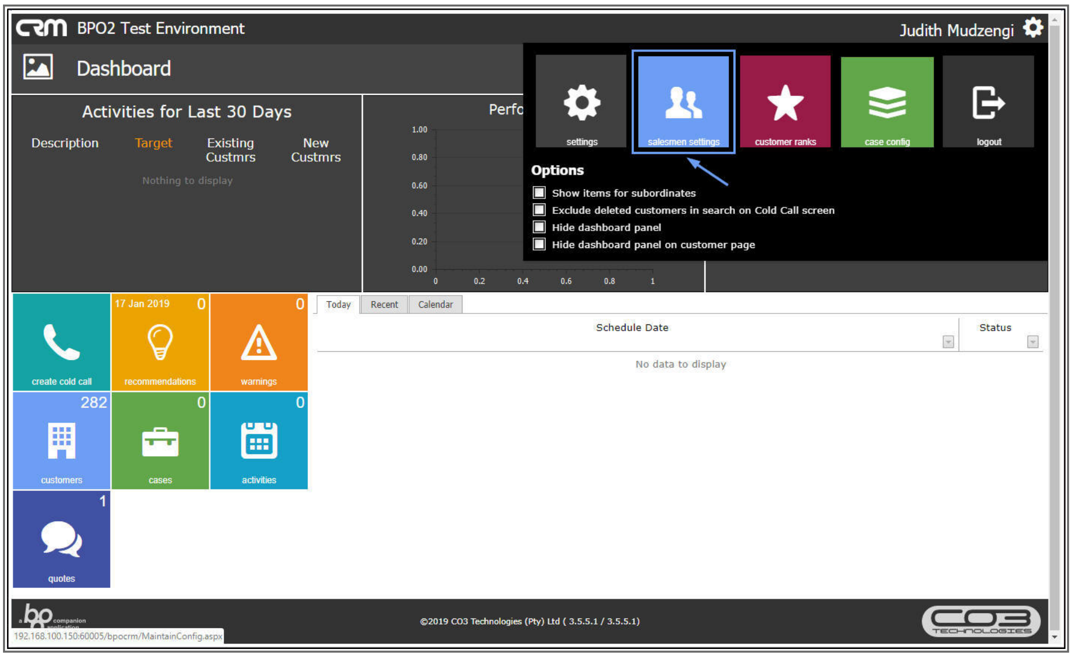
Ribbon Access: *Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx*

CONFIGURE SALESMEN

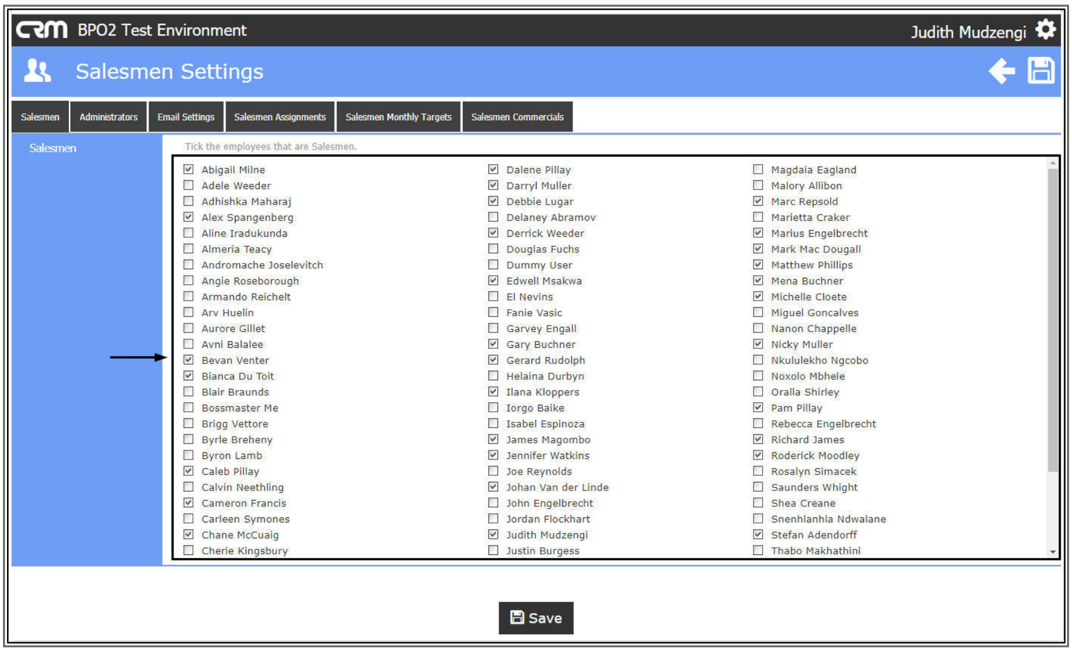
- Click on the ***Settings*** button to the right of your ***UserName***.



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



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

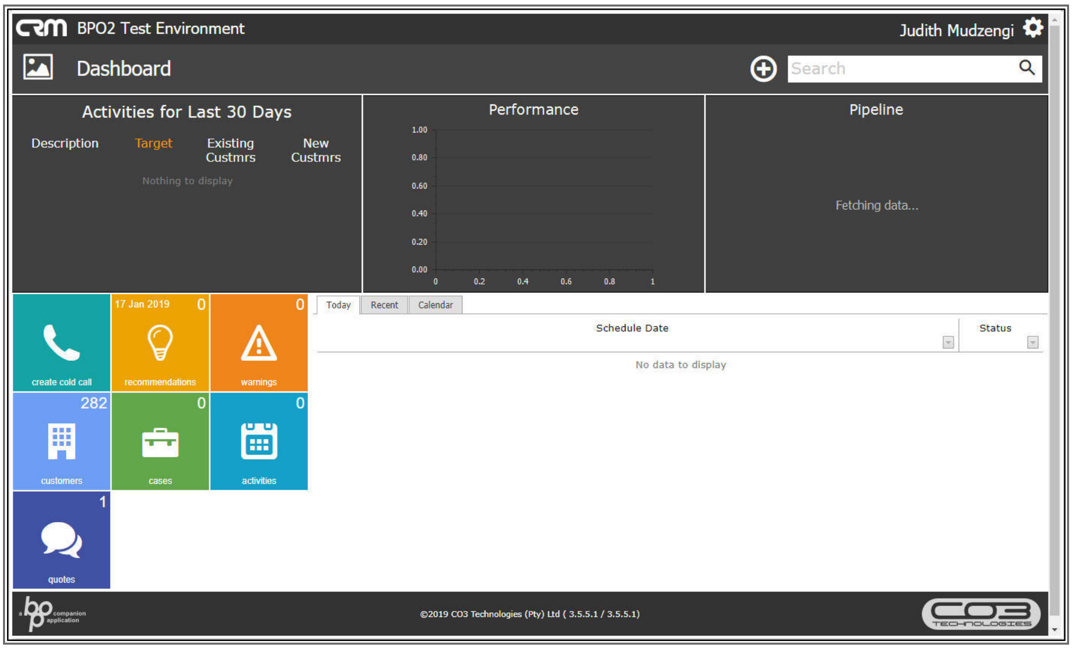


1. Within the ***Salesmen*** tab,
2. The ***Salesmen*** section lists all employees in the system.

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***.



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...
create cold call
17 Jan 2019
recommendations
warnings
282
customers
cases
activities
quotes
Today
Recent
Calendar
Schedule Date
Status
No data to display
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CRM.003.002