

CRM SETTINGS

SALESMEN SETTINGS

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

CONFIGURE SALESMEN

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

CCM BPO2 Test Environment		Judith Mudzengi 🔅
🖾 Dashboard		🔂 Search
Activities for Last 30 Days	Performance	Pipeline
Description Target Existing New Custmrs Custmr		
Nothing to display		
	0.40	Fetching data
17 Jan 2019 0 0 Töday	0 0.2 0.4 0.6 0.8 1 Recent Calendar	
	Schedule Date	Status
S 🛛 🖉 📥 🗕	No data to disp	v v
create cold call recommendations warnings		-7
customers cases activities		
1		
quotes		
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P opplication		TECHNOLOSIES

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



Salesmen Settings

CCM BPO2 Test Environment	Judith Mudzengi 🌣 🕯
🖾 Dashboard	
Activities for Last 30 Days Description Target Existing New Custmrs Custmrs Nothing to display	Perfc 1.00 1.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
17 Jan 2019 0 0 Today	0.20 Hide dashboard panel on customer page 0.00 0 0.2 0.4 0.6 0.8 1 Recent Calendar
	Schedule Date Status
create cold cold recommendations warrings 282 0 0 Image: cold cold Image: cold cold cold cold cold cold cold cold	
quotes	
192.168.100.150:60005/bpocrm/MaintainConfig.aspx	©2019 CO3 Technologies (Phy) Ltd (3.5.5.1 / 3.5.5.1)

• The *Salesmen Settings* screen will be displayed.

Salesi	men Settings			+
lesmen Administrator	s Email Settings Salesmen Assignments Salesmen Mo	nthly Targets Salesmen Commercials		
	Tick the employees that are Salesmen.			
	🗹 Abigail Milne	Dalene Pillay	Magdala Eagland	
	Adele Weeder	Darryl Muller	Malory Allibon	
	Adhishka Maharaj	🗹 Debbie Lugar	Marc Repsold	
	Alex Spangenberg	Delaney Abramov	Marietta Craker	
	Aline Iradukunda	Derrick Weeder	Marius Engelbrecht	
	Almeria Teacy	Douglas Fuchs	Mark Mac Dougall	
	Andromache Joselevitch	Dummy User	Matthew Phillips	
	Angie Roseborough	Edwell Msakwa	Mena Buchner	
	Armando Reichelt	El Nevins	Michelle Cloete	
	Arv Huelin	Fanie Vasic	Miguel Goncalves	
	Aurore Gillet	Garvey Engall	Nanon Chappelle	
	Avni Balalee	Gary Buchner	Nicky Muller	
	Bevan Venter	Gerard Rudolph	Nkululekho Ngcobo	
	Bianca Du Toit	Helaina Durbyn	Noxolo Mbhele	
	Blair Braunds	🗹 Ilana Kloppers	Oralla Shirley	
	Bossmaster Me	Iorgo Baike	Pam Pillay	
	Brigg Vettore	Isabel Espinoza	Rebecca Engelbrecht	
	Byrle Breheny	James Magombo	Richard James	
	Byron Lamb	Jennifer Watkins	Roderick Moodley	
	Caleb Pillay	Joe Reynolds	Rosalyn Simacek	
	Calvin Neethling	Johan Van der Linde	Saunders Whight	
	Cameron Francis	John Engelbrecht	Shea Creane	
	Carleen Symones	Jordan Flockhart	Snenhlanhla Ndwalane	
	Chane McCuaig	Judith Mudzengi	Stefan Adendorff	
	Cherie Kingsbury	Justin Burgess	Thabo Makhathini	

- 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 <u>maximise</u> 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.

Salesm	en Settings		
lesmen Administrators	Email Settings Salesmen Assignments Salesmen Me	onthly Targets Salesmen Commercials	
Salesmen	Tick the employees that are Salesmen.		
	Abigail Milne	Dalene Pillay	Magdaia Eagland
0	Adele Weeder	Darryl Muller	Malory Allibon
	🗌 Adhishka Maharaj	Debbie Lugar	Marc Repsold
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	Aline Iradukunda	Derrick Weeder	Marius Engelbrecht
	Almeria Teacy	Douglas Fuchs	Mark Mac Dougall
	Andromache Joselevitch	Dummy User	Matthew Phillips
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	Arv Huelin	Fanie Vasic	Miguel Goncalves
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	🗌 Avni Balalee	Gary Buchner 3	Nicky Muller
	Bevan Venter	Gerard Rudolph	Nkululekho Ngcobo
0	Bianca Du Toit	Helaina Durbyn	Noxolo Mbhele
4	Blair Braunds	Ilana Kloppers	Oralla Shirley
	Bossmaster Me	Iorgo Baike	Pam Pillay
	Brigg Vettore	Isabel Espinoza	Rebecca Engelbrecht
	Byrle Breheny	James Magombo	Richard James
	Byron Lamb	Jennifer Watkins	Roderick Moodley
	Caleb Pillay	Joe Reynolds	Rosalyn Simacek
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	Chane McCuaig	Judith Mudzengi	Stefan Adendorff
	Cherie Kingsbury	Justin Burgess	Thabo Makhathini
	Chris Haynes	Karlis Gilhool	Thivian Latchmanan

• You will return to the *Dashboard*.



Salesmen Settings

CCM BPO2 Test Environment		Judith Mudzengi 🌣 î
🔀 Dashboard	🕀 🔙	arch 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 0.2 0.4 0.6 0.8 1	
17 Jan 2019 0 0 Today	Recent Calendar	(
🖌 🖓 🖾 🗕	Schedule Date	Status
create cold call recommendations warnings	No data to display	
customers cases activities		
quotes		
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