

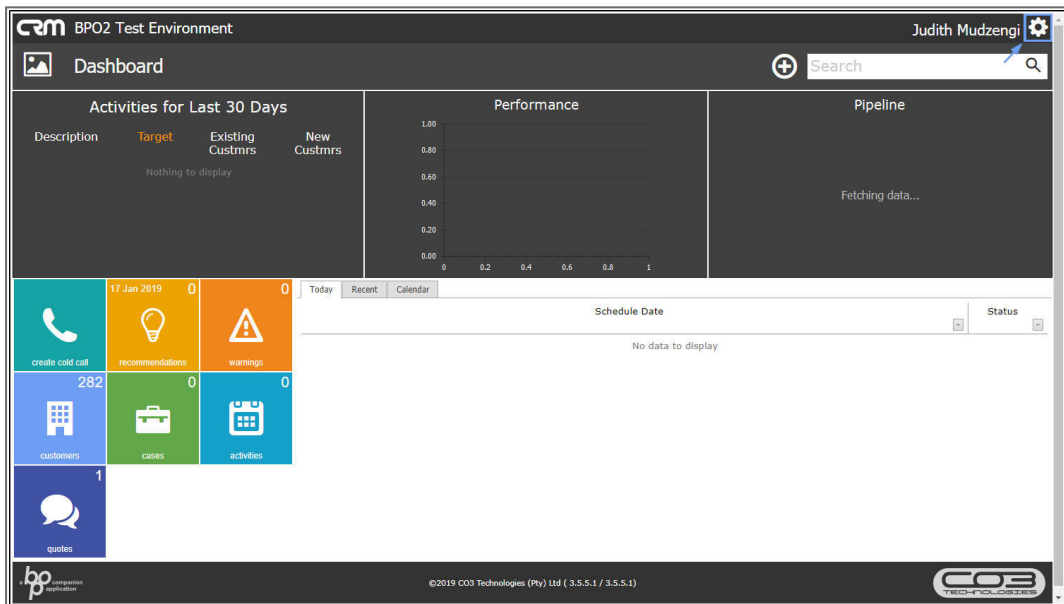
CRM SETTINGS

SALESMEN ASSIGNMENTS

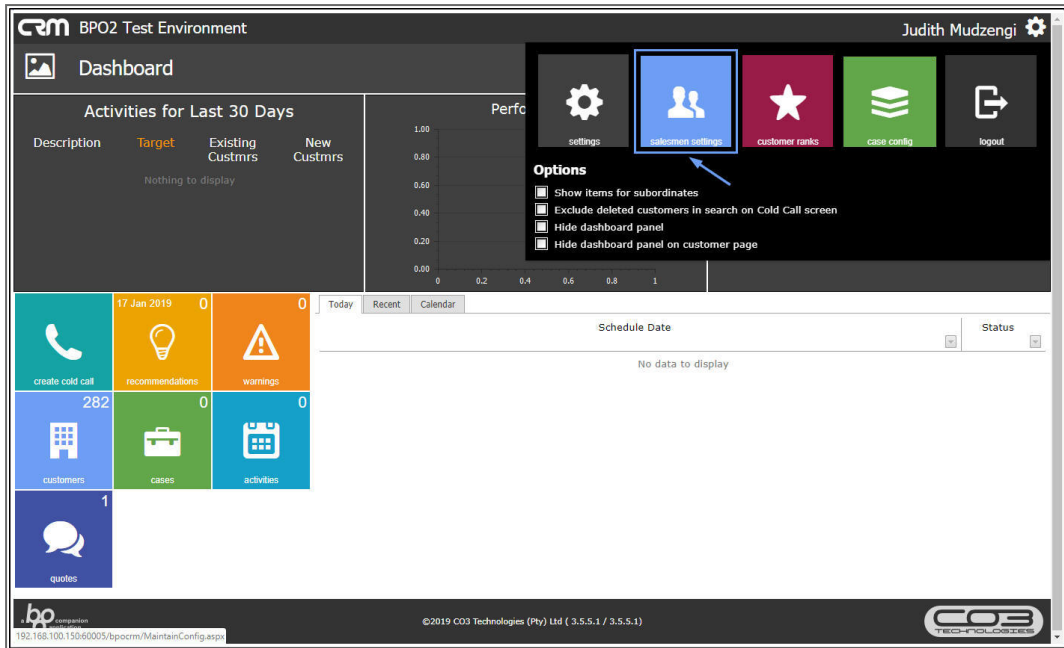
Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

SALESMEN SETTINGS – ASSIGNMENTS

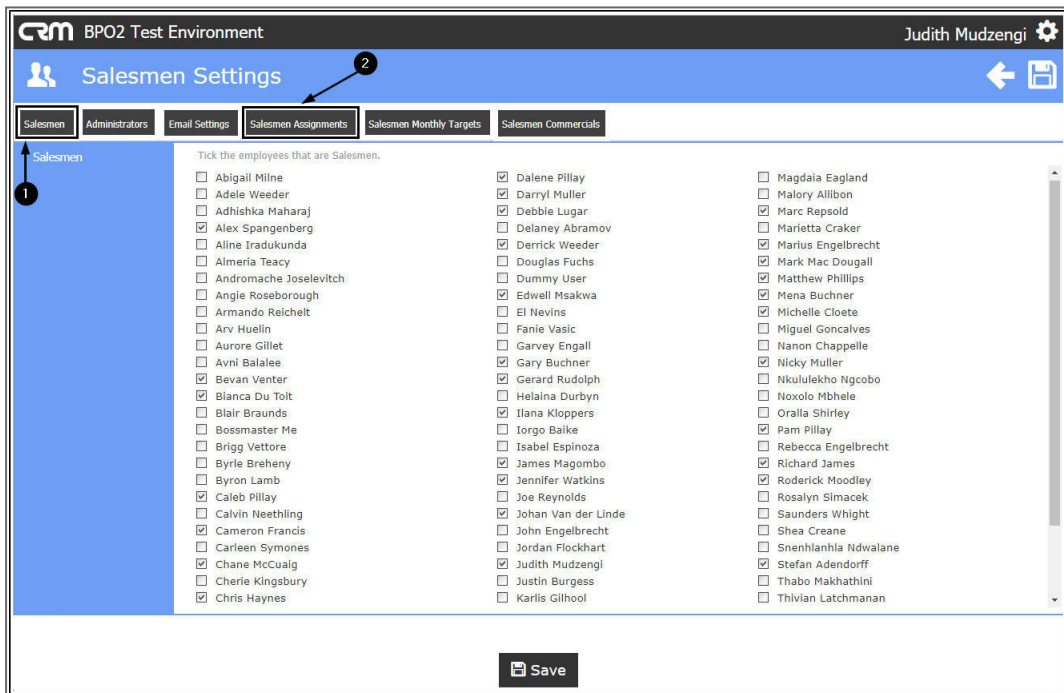
- Click on the **Settings** button to the right of your **UserName**.



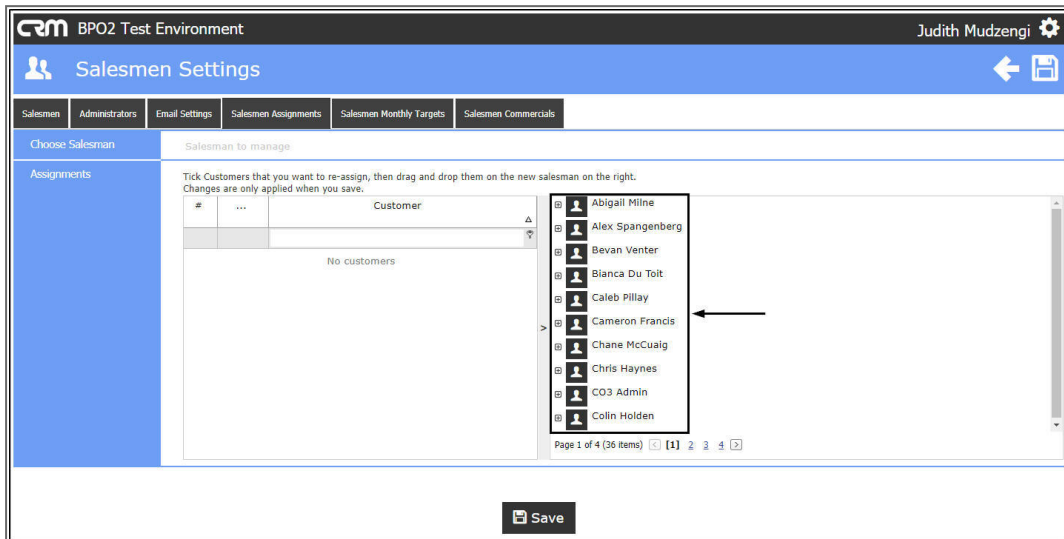
- The session **Options** page will pop up.
- Click on the **Salesmen Settings** tile.



1. The **Salesmen** tab will be selected by default.
2. Click on the **Salesmen Assignments** tab.

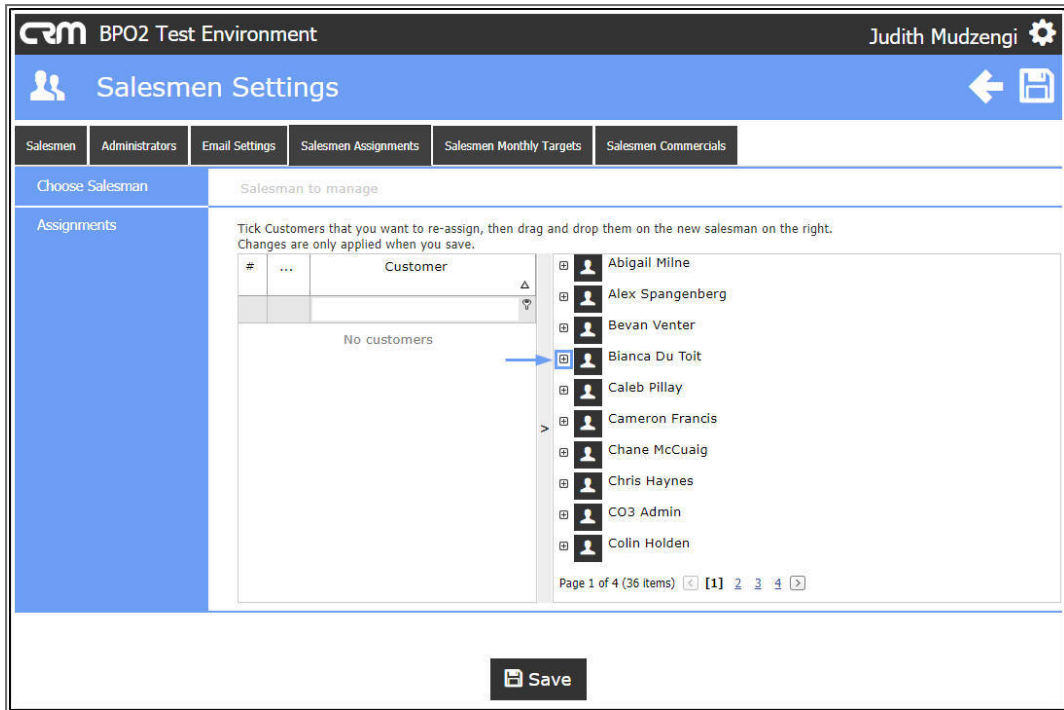


- The **Assignments** section will be displayed.
- The Salesmen list on the right hand side will show you a list of Salesmen.

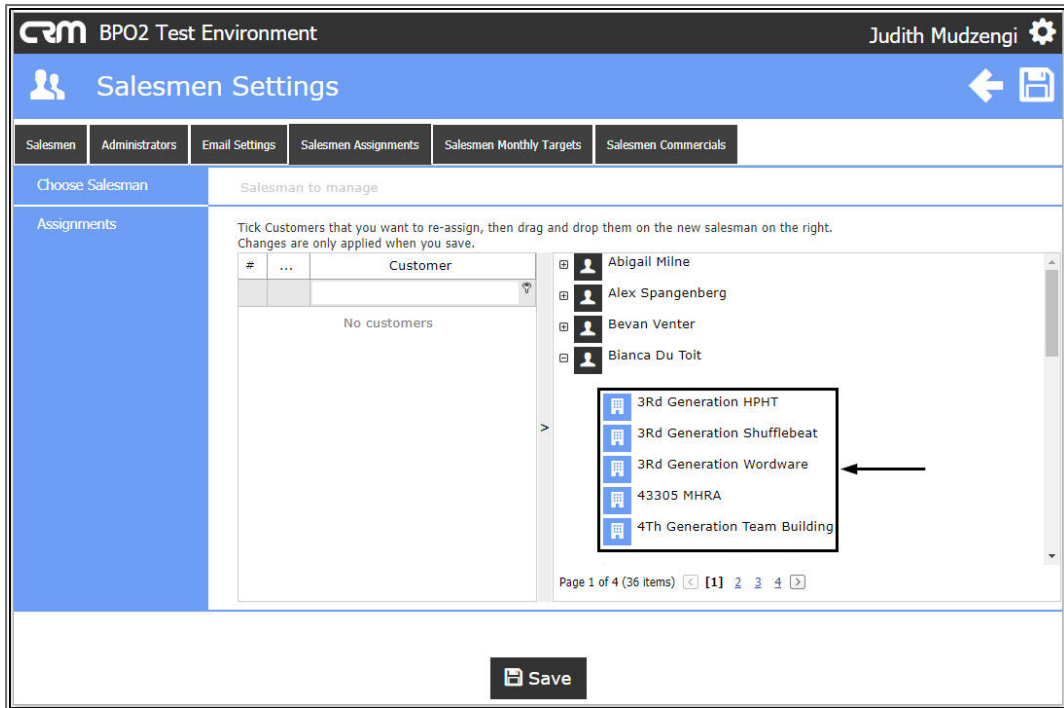


VIEW CUSTOMERS LINKED TO A SALESMAN

- To view customers linked to a salesman (i.e. where the salesman is either the 'main salesman' or 'additional salesman'), click on the **Expand** button.

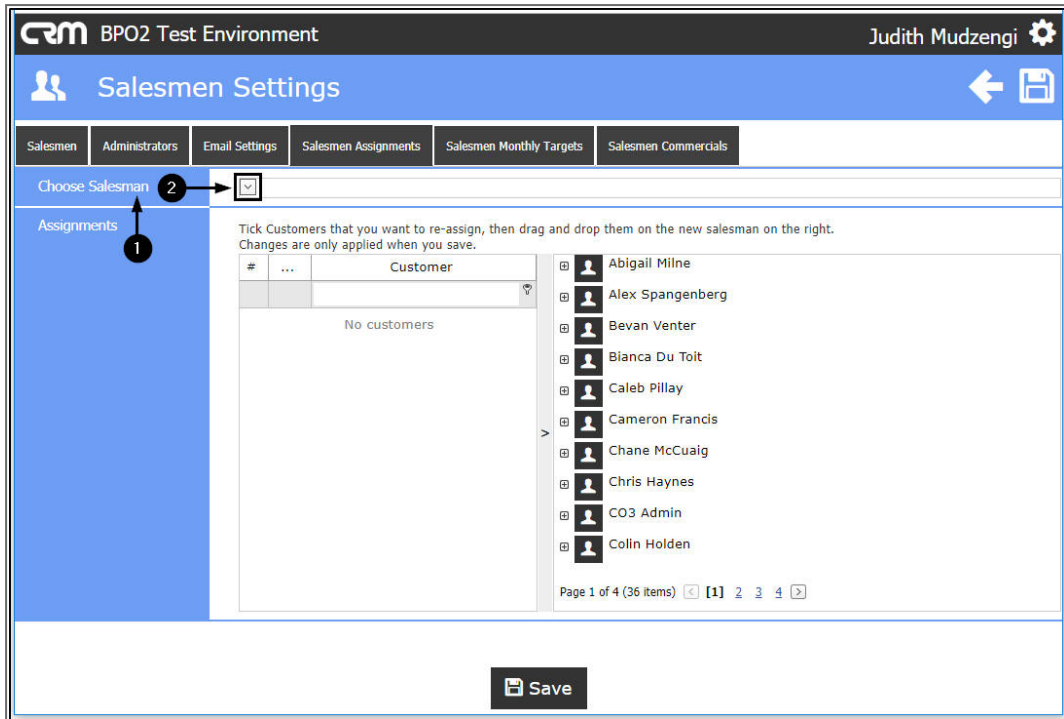


- A list of customers linked to the salesman will be displayed (i.e. where the salesman is either the 'main salesman' or 'additional salesman').



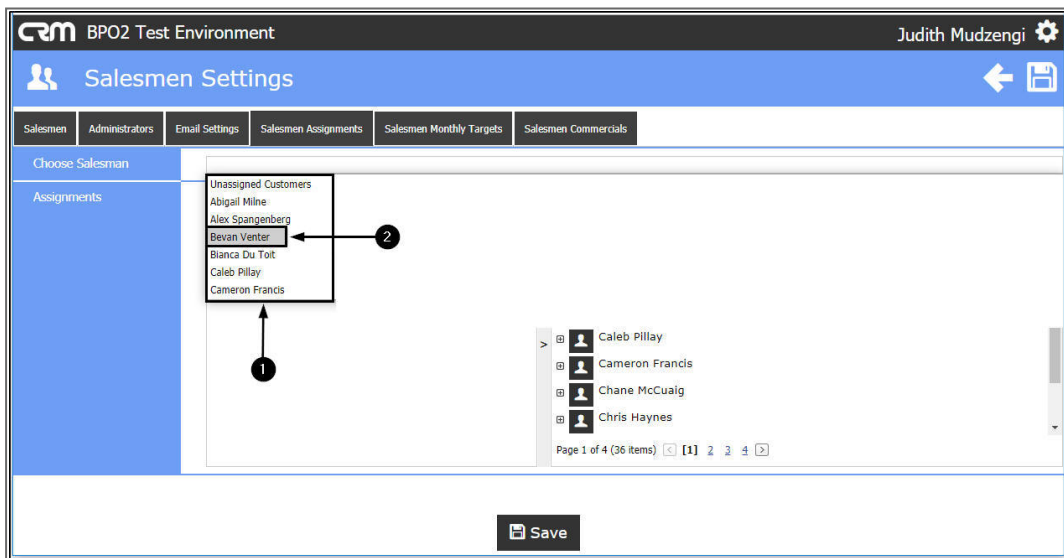
REASSIGN CUSTOMER TO ANOTHER SALESMAN

- If you need to you need to reassign a customer to another salesman, e.g. the salesman has left, or changed selling 'areas'.
 1. In the **Choose Salesman** field,
 2. click on the **down arrow** that pops up when you hover over the **Choose Salesman text box**.

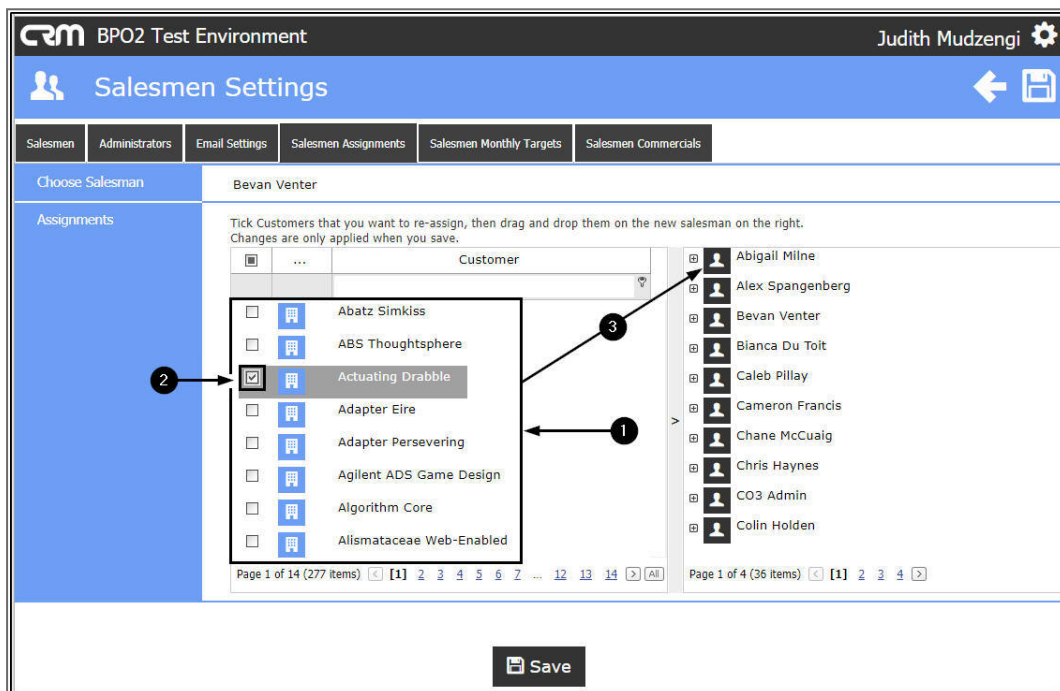


1. A **Salesmen drop-down menu** will be displayed.
2. Select the relevant salesman.

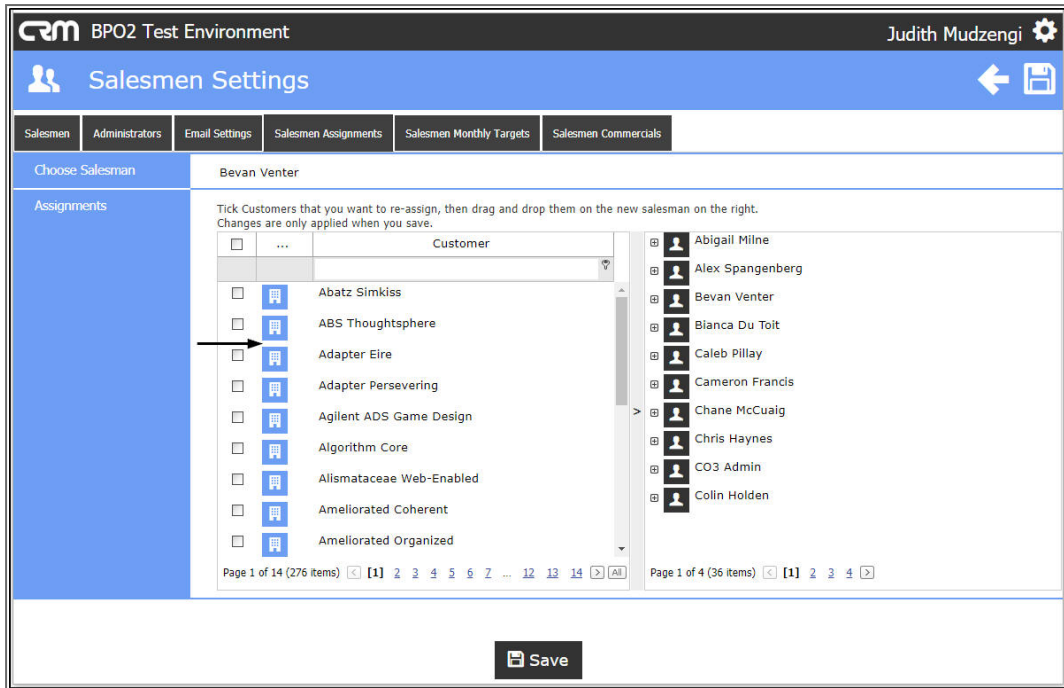
- In this image, **Bevan Venter** has been selected.



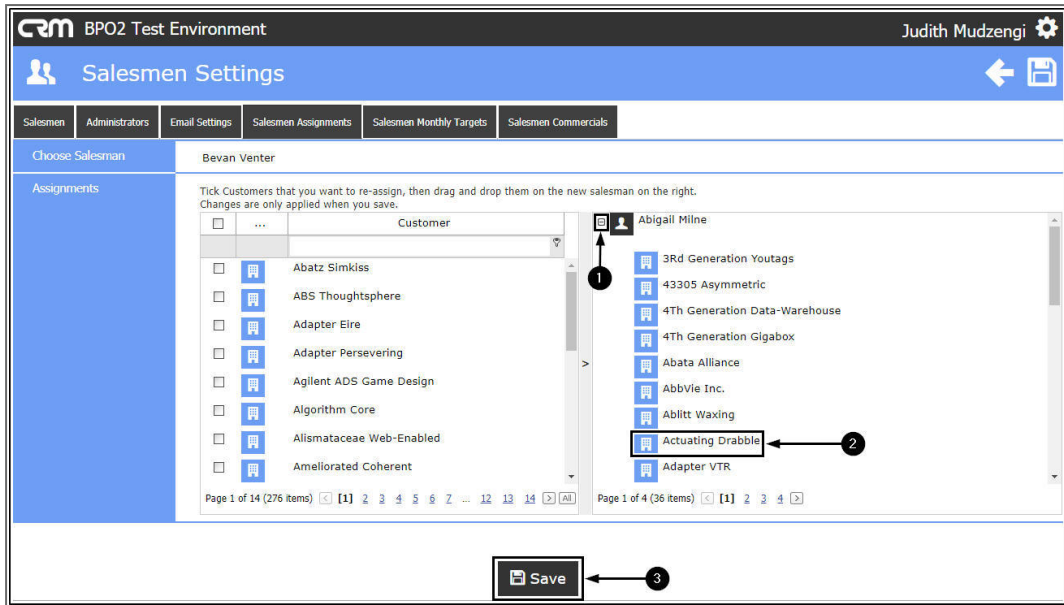
1. A list of customers will come up, where this salesman is the default salesman.
2. Select the customer(s) that need to be re-assigned, by ticking the **check box(es)**.
3. Drag and drop the customer(s) to the relevant Salesman. When re-assigning a customer, all related cases, reminders and recommendations for the salesman are reassigned to the new salesman.
 - In this image, customer **Actuating Drabble** is being re-assigned from **Bevan Venter** to **Abigail Milne**.



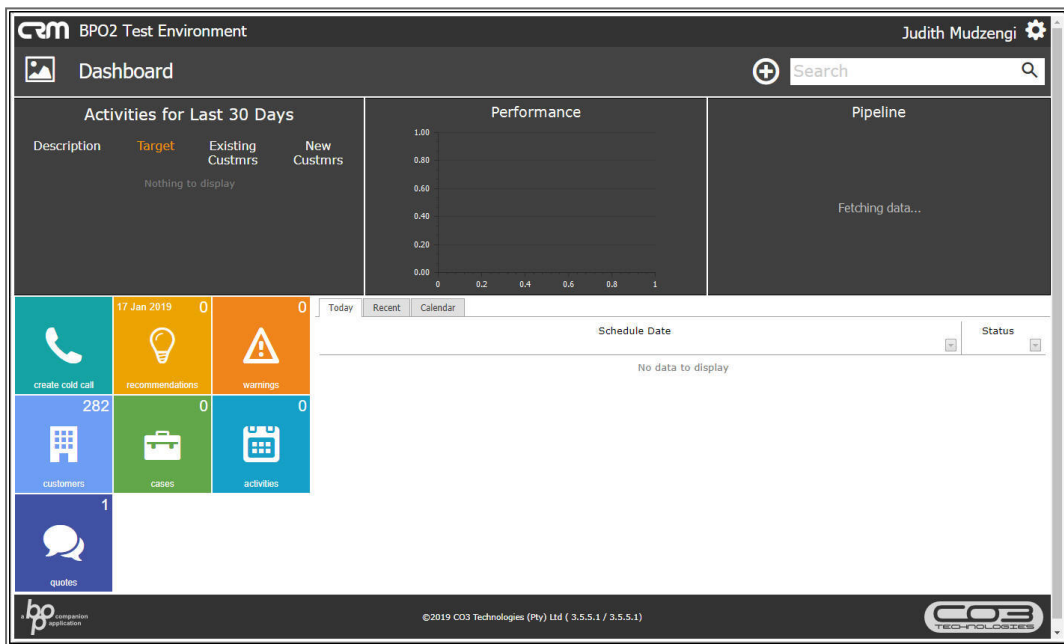
- The customer will no longer be displayed in the customers list of the previous salesman.
 - In this image, **Actuating Drabble** is no longer displayed in **Bevan Venter's** customer list.



1. Click on the **Expand** button to view the current salesman's customers list.
2. The customer will now be displayed in the current salesman's customer list.
 - In this image, customer **Actuating Drabble** is now displayed in **Abigail Milne's** customer list.
3. Click on **Save**.
 - **Note:** Remember to maximise the screen if you do not see the **Save** button.



- You will return to the *Dashboard*.



CRM.003.009

