

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

# **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.

CCM BPO2 Test Environment		Judith Mudzengi 🔅
🖾 Dashboard		🕁 Search
Activities for Last 30 Days	Performance	Pipeline
Description Target Existing New Custmrs Custmrs	0.80	
Nothing to display	0.60	
	0.40	Fetching data
	0.20	
17 Jan 2019 0 0 Today R	0 0.2 0.4 0.6 0.8 1	
	Schedule Date	Status
create cold call recommendations warnings	No data to displa	ay
customens cases activities		
quotes		
Operation         @2019 C03 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1)		

- 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 0.00
17 Jan 2019 0 0 1764y	Hide dashboard panel on customer page           0.00         0.2         0.4         0.6         0.1           Recent         Calendar
	Schedule Date Status
create cold call     recommendations     warnings       282     0     0       cases     0     0       cases     activates	reo osta co uspilay
192.168.100.150.60005/bpocrnt/MaintainConfig.asps	©2019 C03 Technologies (Phy) Ltd ( 3.5.5.1 / 3.5.5.1)

#### • The Salesmen Settings screen will be displayed.

			Judith Mudzengi 📮
🤽 Salesmen S	Settings		← 🗄
Salesmen Administrators Email S	Settings Salesmen Assignments Salesme	en Monthly Targets Salesmen Commercials	
Salesmen	Tick the employees that are Salesmen.		
	Abigail Milne     Adiekik Abaraj     Alme Tradukunda     Almeria Teacy     Andromache Joselsvitch     Angie Roseborough     Armado Reichelt     Avri Balalee     Bevan Venter     Biaris Du Toit     Bordy Du Tanb     Caleb Pilay     Cahirin Kesthing     Caraeron Francis     Carlens Symones     Charle Kingsbury	<ul> <li>Dalene Pillay</li> <li>Darryl Muller</li> <li>Deelaney Abramov</li> <li>Derark Weeder</li> <li>Douglas Fuchs</li> <li>Dummy User</li> <li>Edveli Msakwa</li> <li>El Nevins</li> <li>Fanle Vasic</li> <li>Garvey Engali</li> <li>Garye Buchner</li> <li>Garvey Buchner</li> <li>Garve Buchner</li> <li>Garve Buchner</li> <li>Garve Buchner</li> <li>Jane Kloppers</li> <li>Iroigo Baike</li> <li>Isabel Espinoza</li> <li>Janes Magombo</li> <li>Janen Fwachdins.</li> <li>Joe Reymolds</li> <li>Johan Fuckhart</li> <li>Jordan Flockhart</li> <li>Justin Burgess</li> </ul>	Magdala Eagland Malory Allibon Marc Repsold Marc Repsold Marc Repsold Marles Engebrecht Marlus Engebrecht Marlus Engebrecht Marlus Engebrecht Marlus Engebrecht Marlus Miguel Goncalves Nanon Chappelle Nicky Muller Nicky Muller Nicky Muller Nicky Muller Nicky Muller Nicky Muller Naudos Mubele Oralla Shirley Pam Pillay Robecca Engebrecht Richard James Roderick Moodley Subac Sinaek Subac Sinaek Subac Sinaek Subac Sinaek Subac Andorff Thabe 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.



• You will return to the Dashboard.



## Salesmen Settings

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🔼 Dashboard		Search Q
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	0.20	
	0.00 0.2 0.4 0.6 0.8 1	
17 Jan 2019 0 0 Today	Recent Calendar Schedule Date	Status
	No data to display	
customers cases activities		
quotes		
	©2019 CO3 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1)	TEO-FOLOSIES

CRM.003.002

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