

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

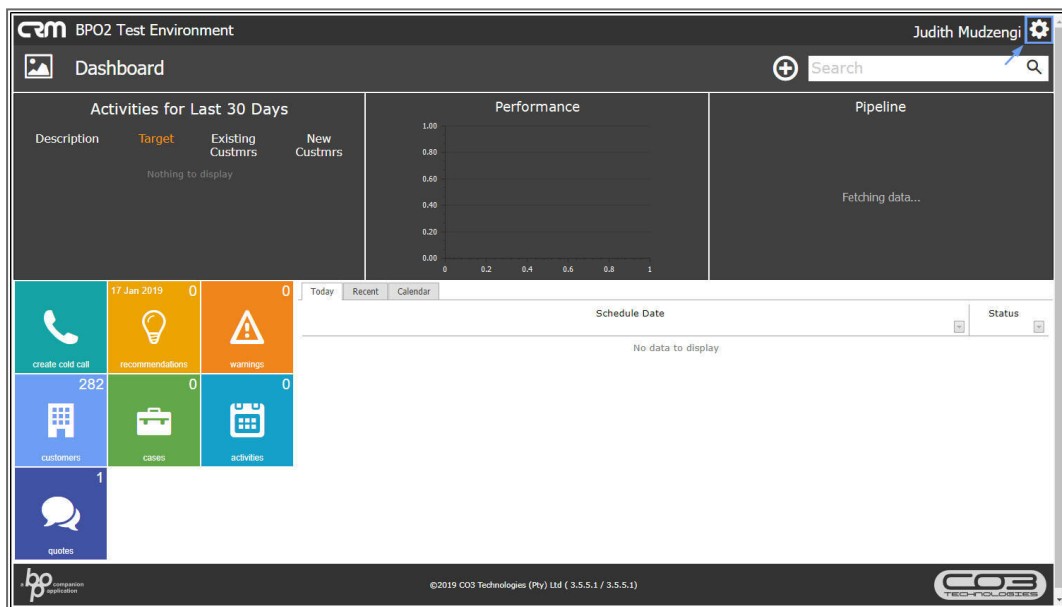
CRM SETTINGS

SALESMEN SETTINGS

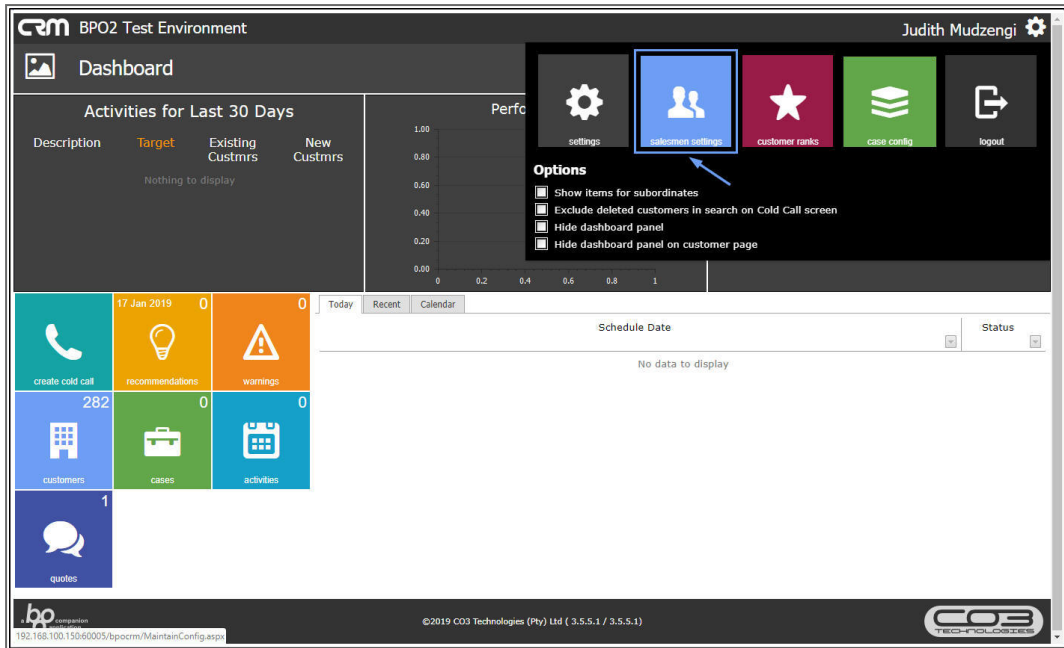
Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

CONFIGURE SALESMEN

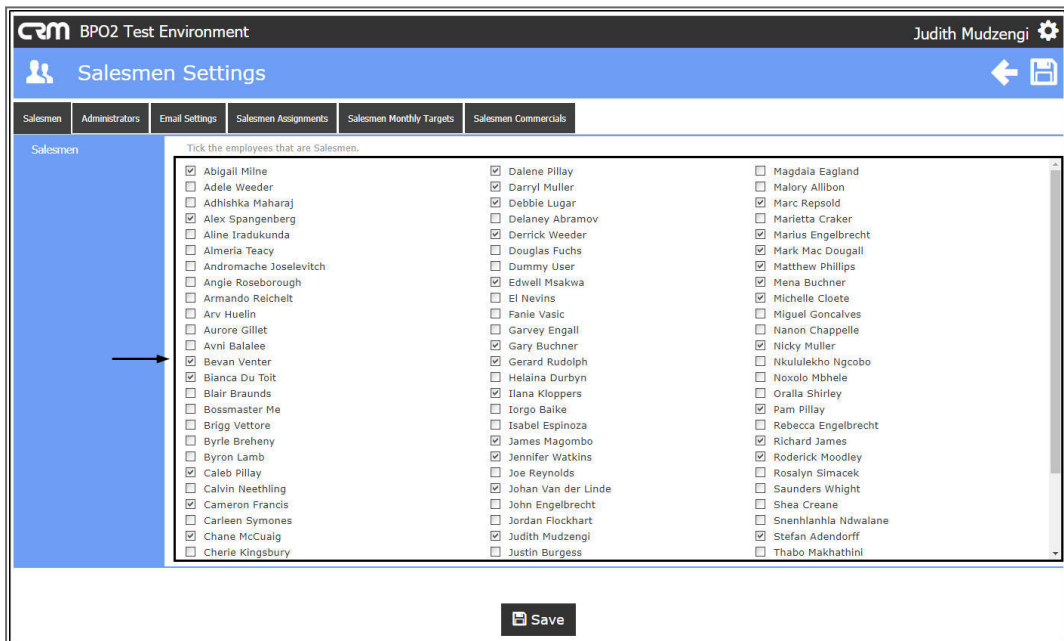
- Click on the **Settings** button to the right of your **UserName**.



- 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**.

The screenshot shows a CRM dashboard for a test environment. At the top, it says 'CRM BPO2 Test Environment' and 'Judith Mudzengi'. The main dashboard area is divided into several sections:

- Dashboard:** Includes a search bar and a 'Dashboard' title.
- Activities for Last 30 Days:** A table with columns for 'Description', 'Target', 'Existing Custmrs', and 'New Custmrs'. It currently shows 'Nothing to display'.
- Performance:** A line chart with a y-axis from 0.00 to 1.00 and an x-axis from 0 to 1. It is currently empty.
- Pipeline:** A section that says 'Fetching data...'.
- Summary Cards:** A grid of cards for 'create cold call', 'recommendations', 'warnings', 'customers' (282), 'cases', 'activities', and 'quotes' (1).
- Calendar:** A section for 'Schedule Date' with tabs for 'Today', 'Recent', and 'Calendar'. It shows 'No data to display'.

At the bottom, there is a footer with '©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)' and the CO3 TECHNOLOGIES logo.

CRM.003.002