

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

CRM SETTINGS

ADMINISTRATORS

- The Administrator option is for clients where an employee will be creating Cases and Activities on behalf of the Salesman.
- You can select employees who have full access to all customers (be careful allocating this access).

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



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

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



CRM Administrators

BPO2 Test Environment	Judith Mudzengi 🍄
🖾 Dashboard	
Activities for Last 30 Days Description Target Existing New Custmrs Custmrs Nothing to display	Perfc
17 Jan 2019 0 0 Today Create cold call Image: call call call call call call call cal	Recent Calendar Schedule Date Status I
quates guates 192, 168,100,156,60005,bpocrn/MaintainConfig.aspx	@2019 C03 Technologies (Ptr) Ltd (3.5.5.1 / 3.5.5.1)

- 1. The **Salesmen** tab is selected by default.
- 2. Click on the **Administrators** tab.

CCM BPO2 Test Environment Judith Mudzeng			n Mudzengi 🌻	
🤽 Salesme	n Settings			🔶 🗎
Salesmen Administrators E	Email Settings Salesmen Assignments Salesmen Monthly	argets Salesmen Commercials		
Salesmen	Tick the employees that are Salesmen.			
• •	Abigail Milne Advisika Maharaj Advisika Maharaj Alake Spangenberg Aline Tradukunda Ameria Teacy Andromake Josefevitch Angle Roseborough Armanda Reichelt Avri Bulalee Avri Bulalee Bevan Venter Blanca Du Toit Bahar Erraunda Bossmaster Me Brigg Vetore Byrie Breheny Byron Lamb Carleen Syllaye Carleen Symones Charle KCuajg Cherie Kingsbury	Dalene Pillay Daryl Huller Darböle Lugar Debble Lugar Delaney Abramov Derrick Weeder Douglas Fuchs Dummy User El Nevins El Nevins Enie Vasic Garavey Engall Garay Buchner Garay Buchner Garay Buchner Garay Buchner Jana Koppers Iorogo Baike Jaams Majombo Jamms Majombo Johan Van der Linde Johan Van der Linde Johan Van der Linde Johan Vasic Bierecht Judra Hudzangl Judit Murgess Karlis Gilbod	Magdala Eagland Maiory Alliloon Marc Repold Maric Repold Marick Engelitencht Mark Mac Dougall Marken Mac Dougall Marken Mac Dougall Marken Mac Dougall Marken Mac Dougall Mathew Philips Meas Buchner Michelle Cloate Miguel Goncalves Nacky Mullar Nanon Chappelle Nicky Mullar Nakulukeko Ngozbo Noxolo Mbhele Oralla Shinfey Robenze Engelbrecht Richard James Roderix Moodley Snaely Simacek Sunders Whight Shea Creane Snenhanhla Hdwalane S Stefan Admoorff Tabo Makhathini Thvian Lacktomann	4

• A list of all employees will be displayed in the **Administrators** section.



en Administrators	Email Settings Salesmen Assignments Salesmen Monthly	Targets Salesmen Commercials		
	Tick the amployees that are Administrators. These us	tare have full access to ALL CLISTOMERS, so he careful allocating this access		
	Almeria Teacy	Douglas Fuchs	Mark Mac Dougall	
	Andromache Joselevitch	Dummy User	Matthew Phillips	
	Angle 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 McCualg	Judith Mudzengi	Stefan Adendorff	
	Cherie Kingsbury	Justin Burgess	Thabo Makhathini	
	Chris Haynes	Karlis Gilhool	Thivian Latchmanan	
	Clevie Huncote	🗹 Kashmira Nirghin	Verusha Govender	
	CO3 Admin	Kessia Maitland	Wasim Khan	
	Cob Charlo	Kim Engelbrecht	Willy Pierce	
	Colin Holden	Leigh Stanborough	Xymenes Capner	
	Cori Clail	Lucky Mawuye		

- 1. Click on the **checkbox(es)** to mark the relevant employee(s) as administrators.
 - Note: Some employees may be marked as administrators by default, if they are not administrators, unmark them by clicking on the marked checkbox.
- 2. Click on the **Save** button or
- 3. click on the **Save** icon.

CRM BPO2 Test	Environment			Judith Mudzengi 🌣
🤽 Salesme	en Settings			+ 🖪
Salesmen Administrators	Email Settings Salesmen Assignments Salesmen Monthly Ta	rgets Salesmen Commercials		
Administrators	Tick the employees that are Admentizates. These users Bears and the set of t	e heve fill access to ALL CUSTONEES, en la caneful allocationg this access.	Hisudishba Kigoba Hisudishba Kigoba Hisudishba King Pain Filiay Pain Filiay Robacc Engellerent: Richard James Rodekic Moddlay Roaalyn Simackk Sundern Whight Shea Crante Section Addreff Tabbo Makhathini Thivian Lacthmanan Versin Kana Wiji Pierce Wasim Khan Wiji Pierce Xymenes Capper	

• You will return to the **Dashboard**.



CRM Administrators

CCM BPO2 Test Environment Judith Mudzengi			
🔼 Dasht	board		Search Q
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			0.40
			0.00 0.2 0.4 0.6 0.8 1
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		<u>A</u> –	Schedule Date Status
create cold call	recommendations	warnings	no oata to uspiay
Lusioners 1	cases	activities	
\mathbf{Q}			
quotes			
a post companion application			©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)

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