

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

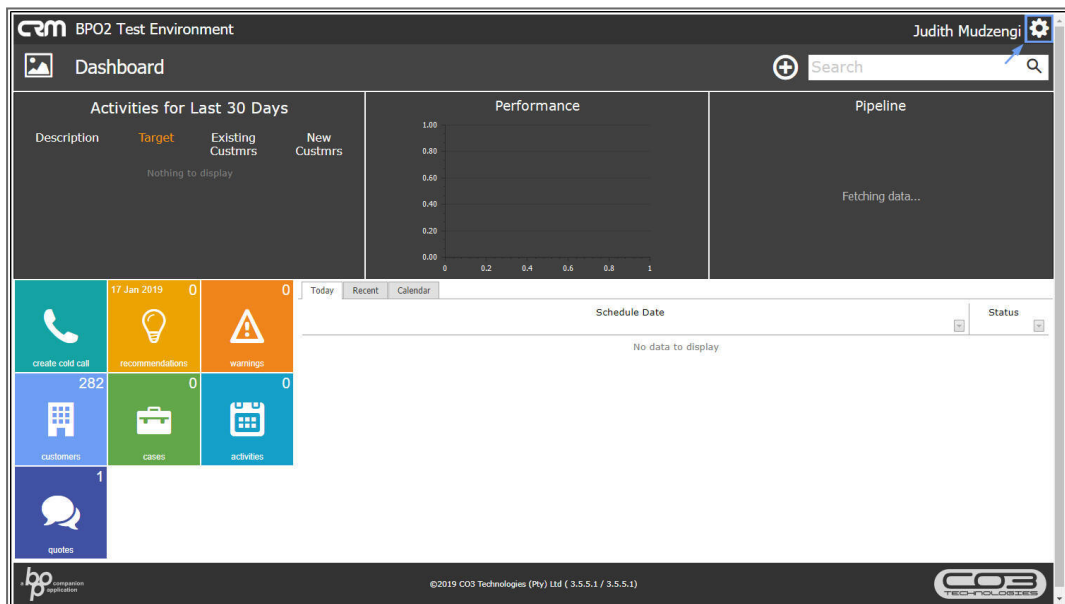
CRM SETTINGS

ADMINISTRATORS

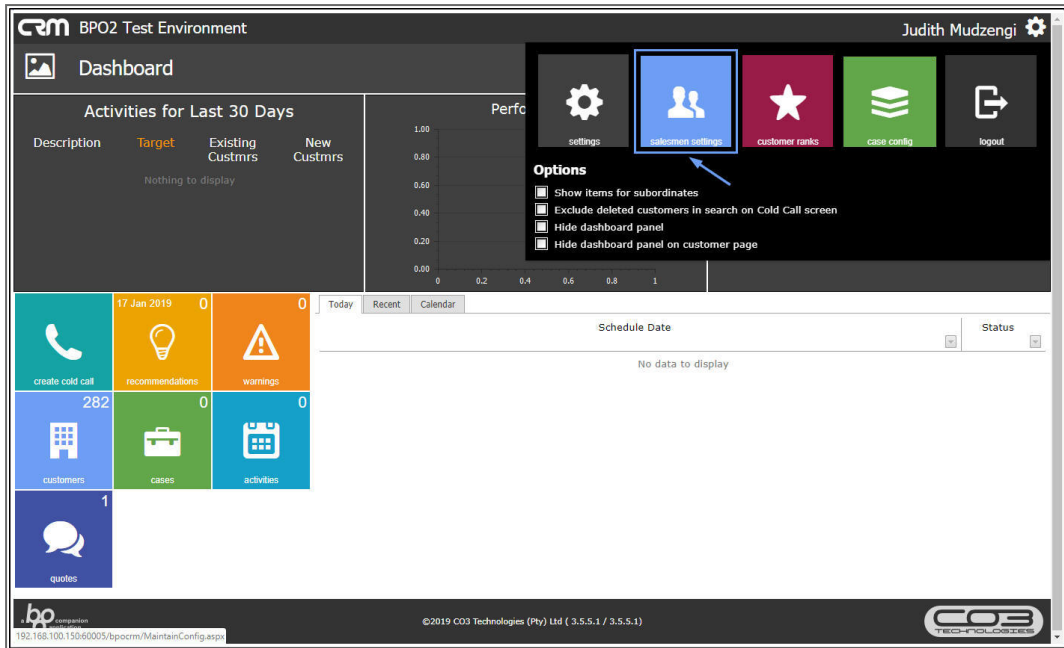
- The Administrator option is for clients where an employee will be creating Cases and Activities on behalf of the Salesman.
- You can select employees who have full access to all customers (be careful allocating this access).

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

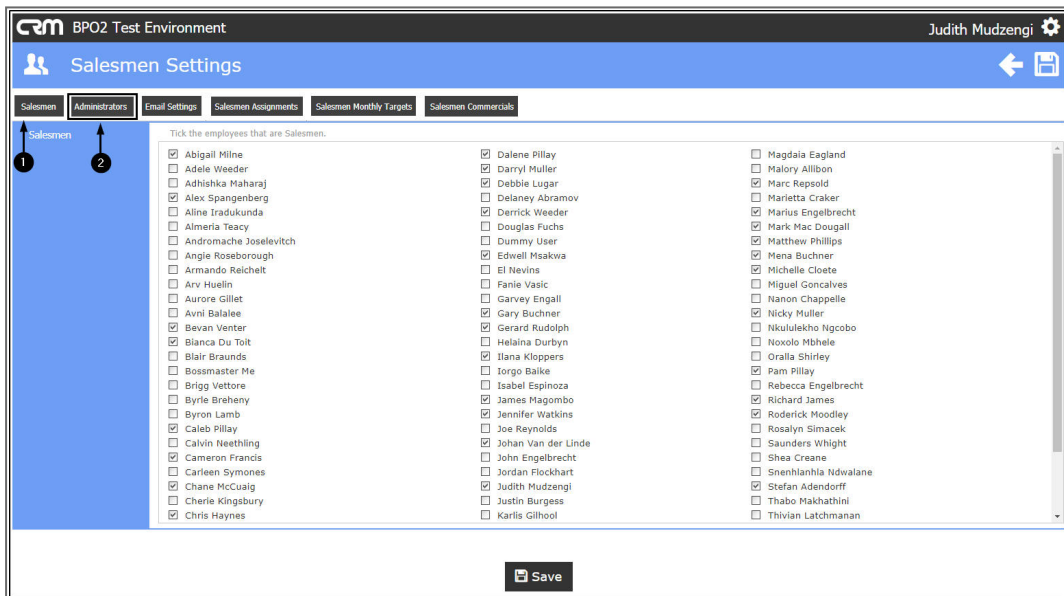
- Click on the **Settings** button to the right of your **UserName**.



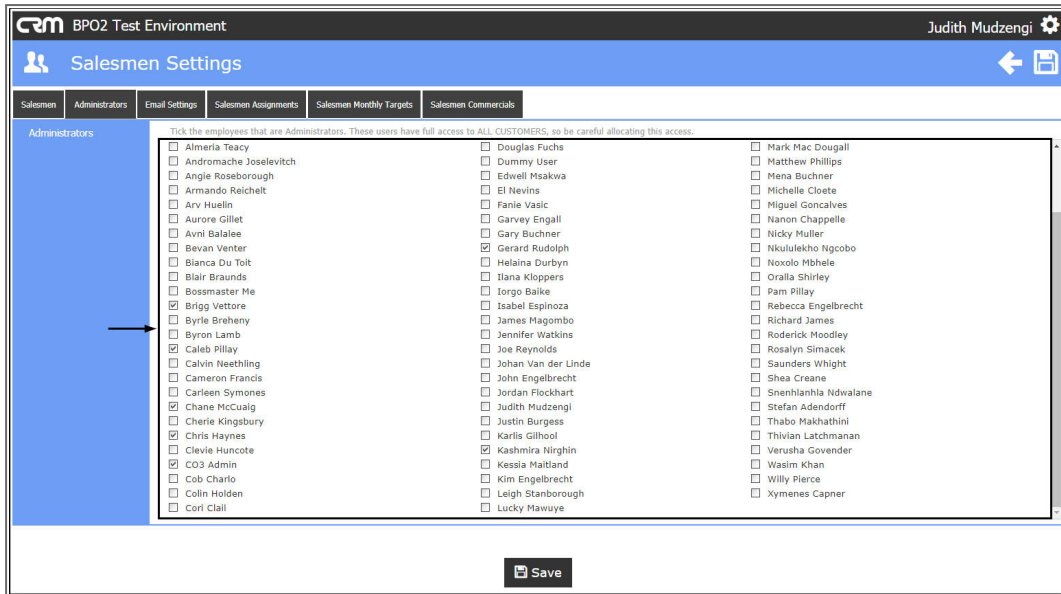
- The session **Options** page will pop up.
- Click on the **Salesmen Settings** tile.



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



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

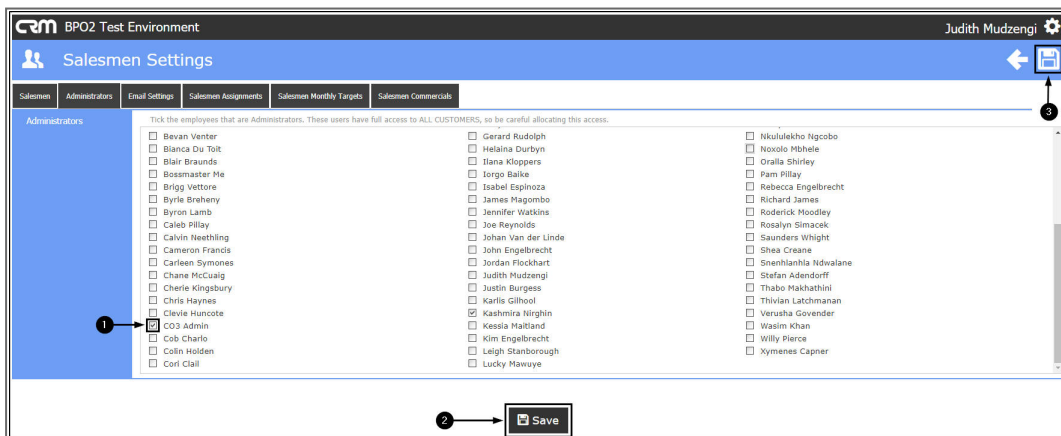


1. Click on the **checkbox(es)** to mark the relevant employee(s) as administrators.

- **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.



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

The screenshot shows a CRM dashboard for a BPO2 Test Environment. At the top, it displays the user name 'Judith Mudzengi' and a search bar. The main dashboard is divided into several sections:

- 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. The chart area is empty.
- Pipeline:** A section that says 'Fetching data...'.
- Summary Tiles:** A grid of colored tiles showing counts for various metrics:
 - create cold call: 0
 - recommendations: 0
 - warnings: 0
 - customers: 282
 - cases: 0
 - activities: 0
 - quotes: 1
- Schedule Date:** A section with tabs for 'Today', 'Recent', and 'Calendar'. It shows 'No data to display'.

At the bottom of the dashboard, there is a footer with the CO3 logo, the text '©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)', and a small 'bp' logo.

CRM.003.005