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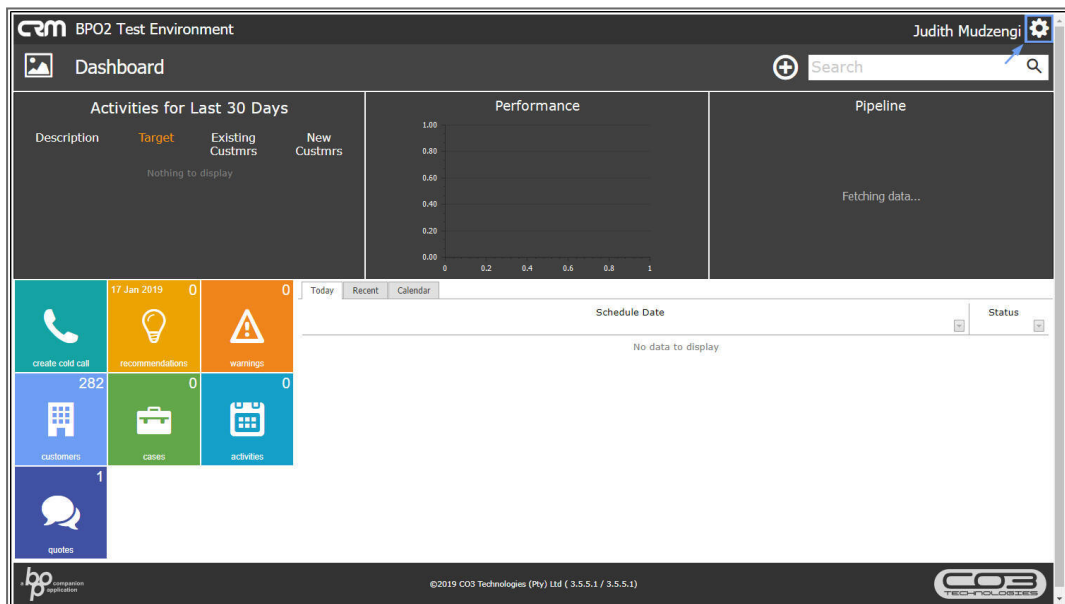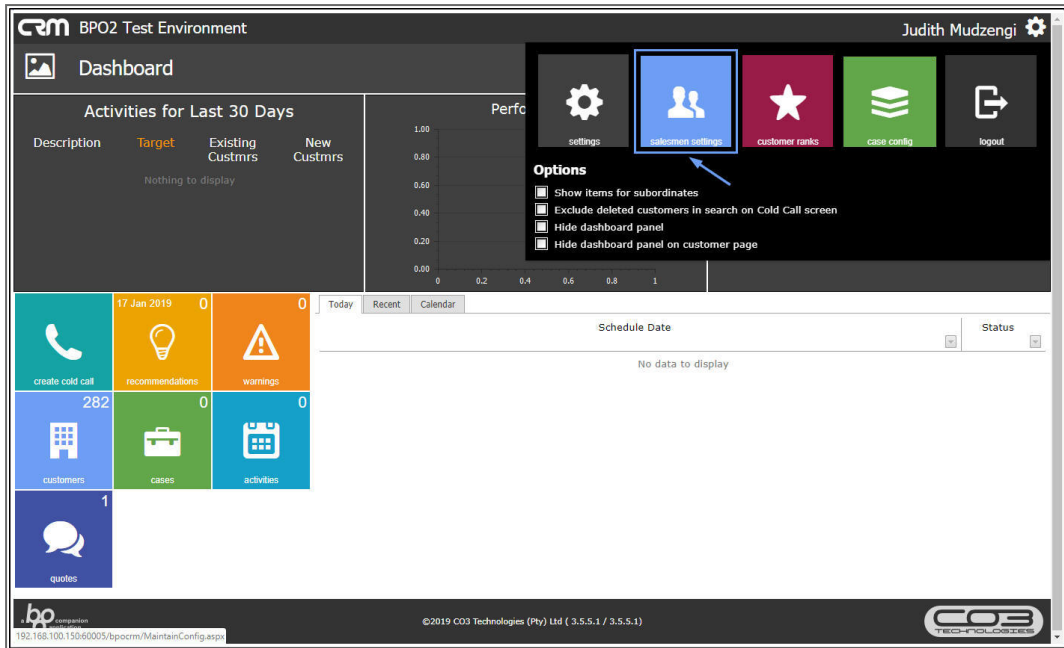
CRM SETTINGS

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).

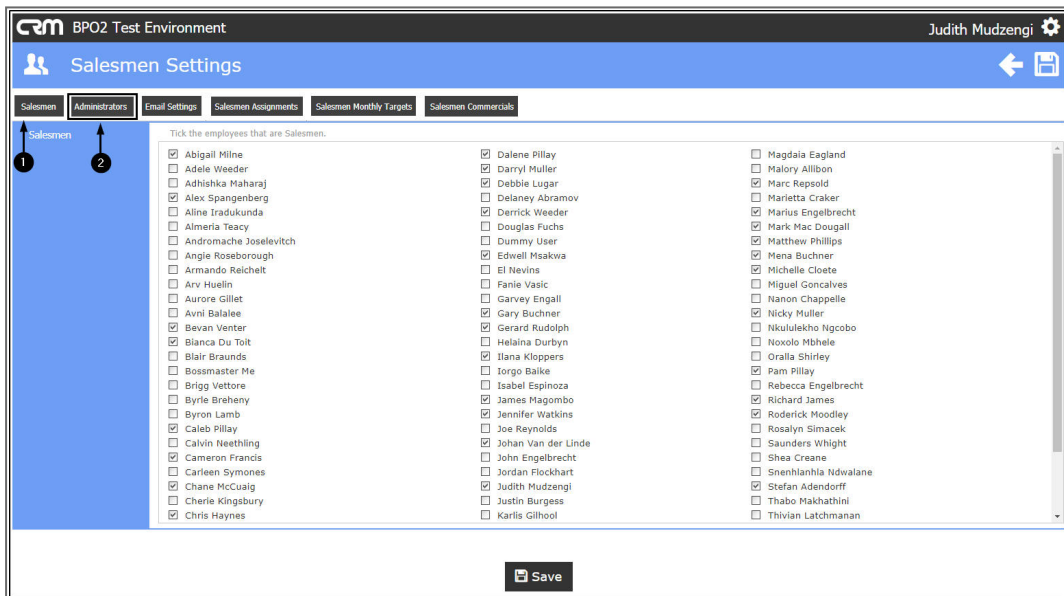**Ribbon Access:** Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx

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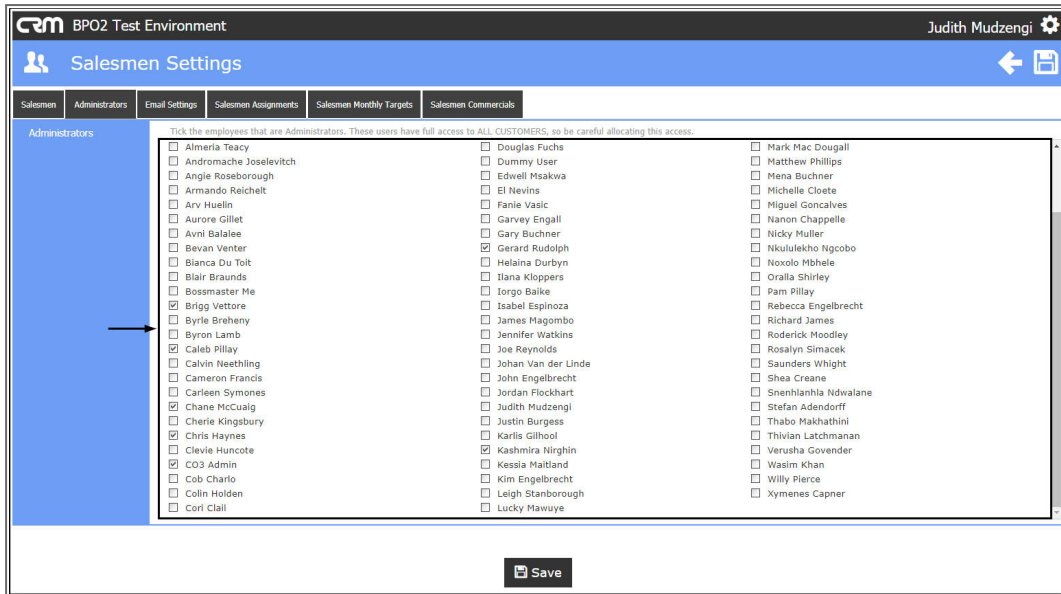- Click on the **Settings** button to the right of your **UserName**.

- 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.

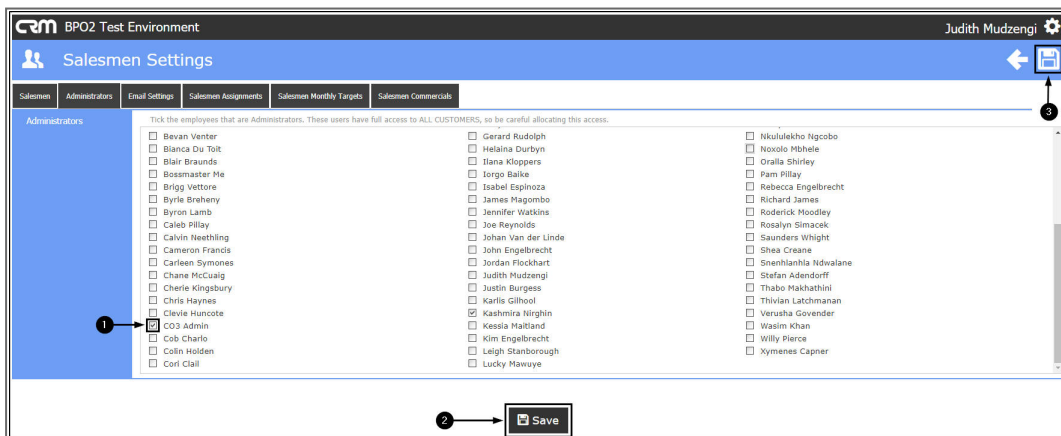- A list of all employees will be displayed in the **Administrators** section.

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**.

CRM.003.005