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

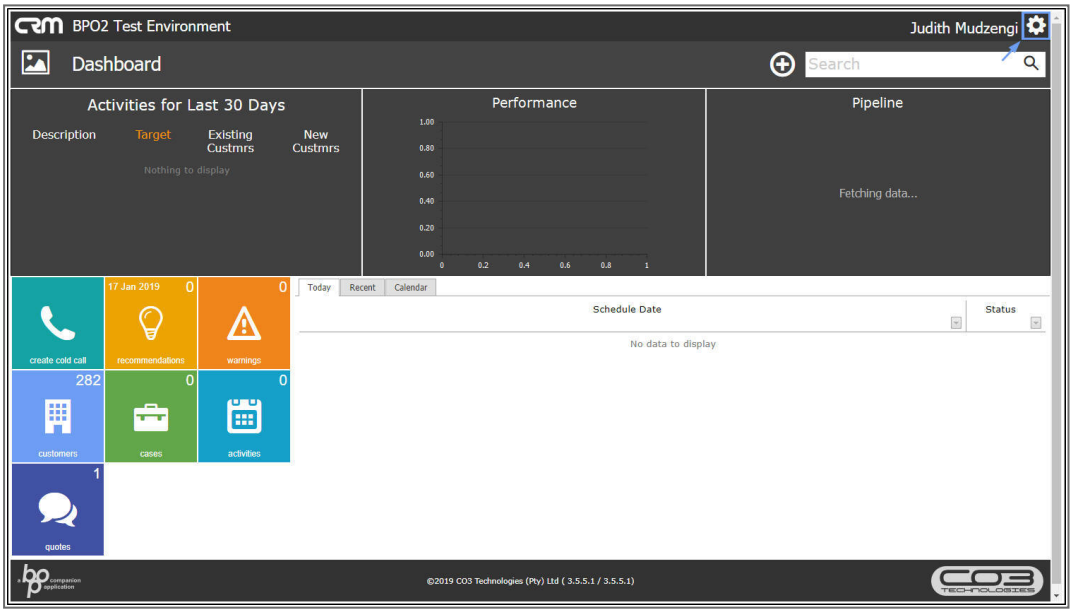
CRM SETTINGS

SALESMEN ASSIGNMENTS

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

SALESMEN SETTINGS – ASSIGNMENTS

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



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

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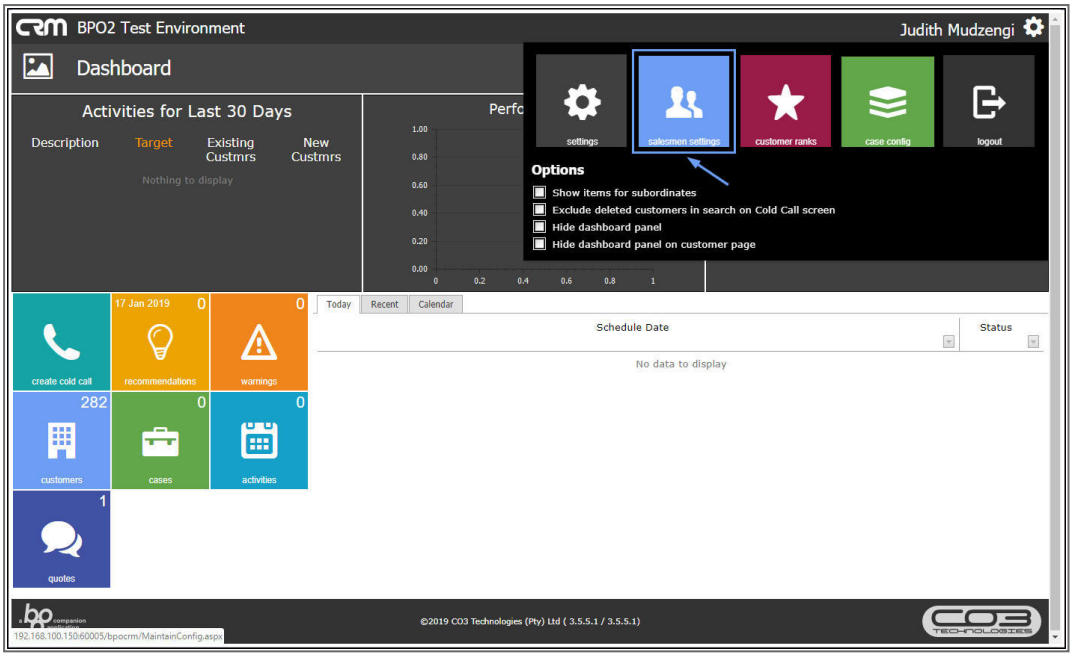
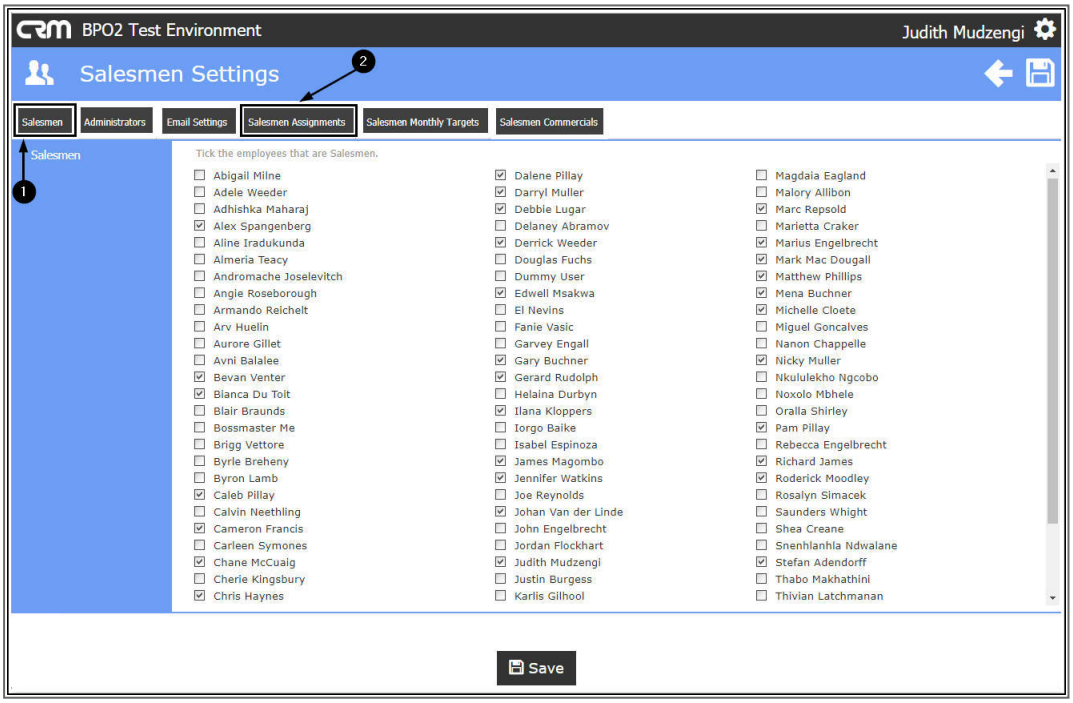


1. The **Salesmen** tab will be selected by default.
2. Click on the **Salesmen Assignments** tab.



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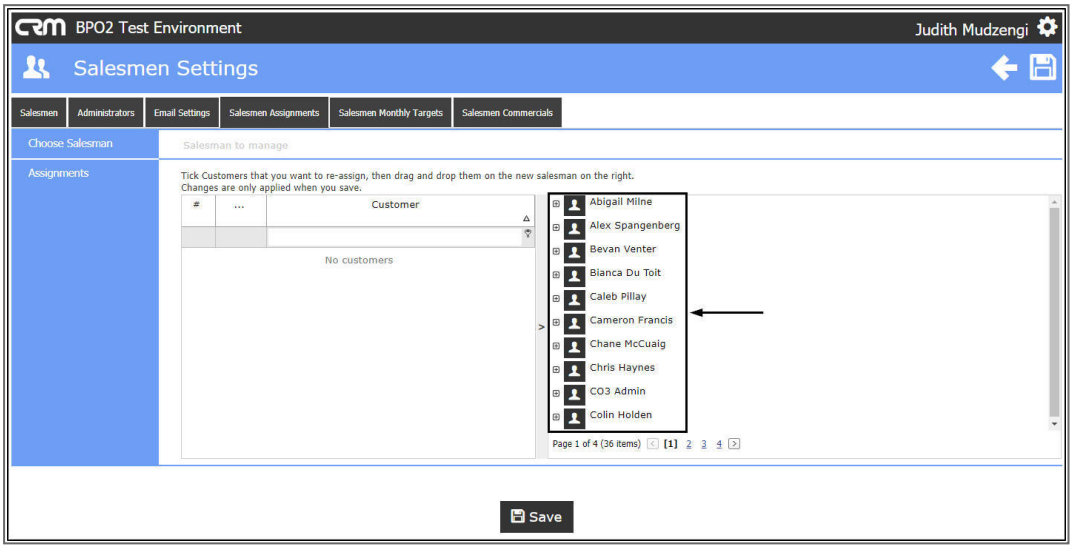
- The **Assignments** section will be displayed.
- The Salesmen list on the right hand side will show you a list of Salesmen.



VIEW CUSTOMERS LINKED TO A SALESMAN

- To view customers linked to a salesman (i.e. where the salesman is either the 'main salesman' or 'additional salesman'), click on the **Expand** button.

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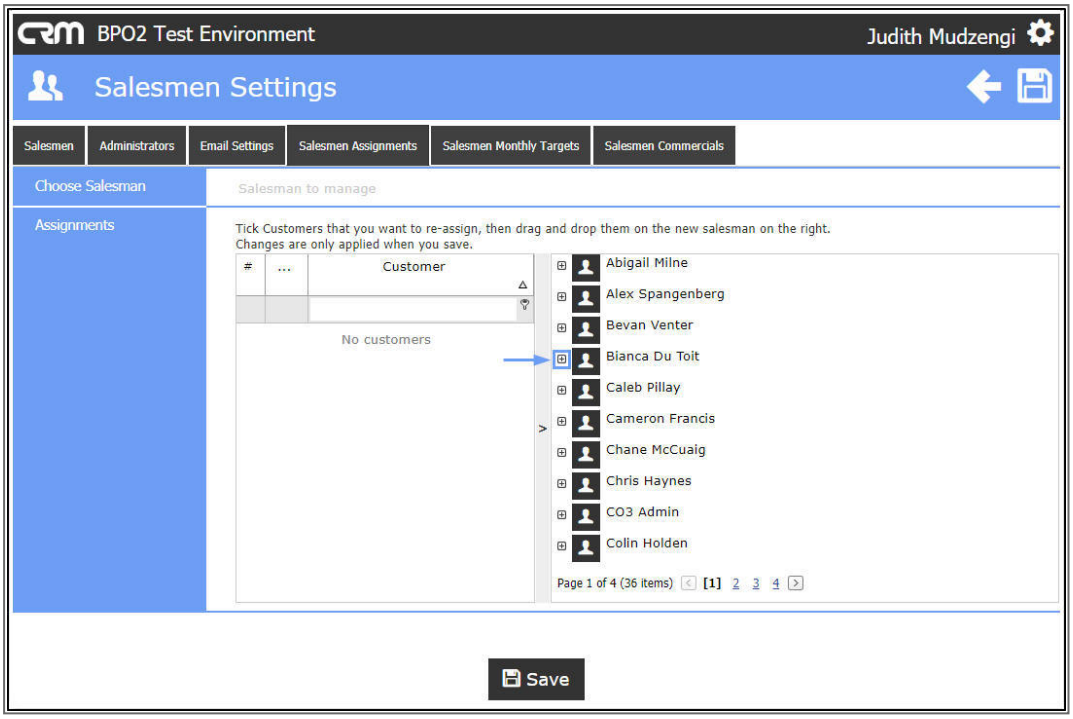

- A list of customers linked to the salesman will be displayed (i.e. where the salesman is either the 'main salesman' or 'additional salesman').

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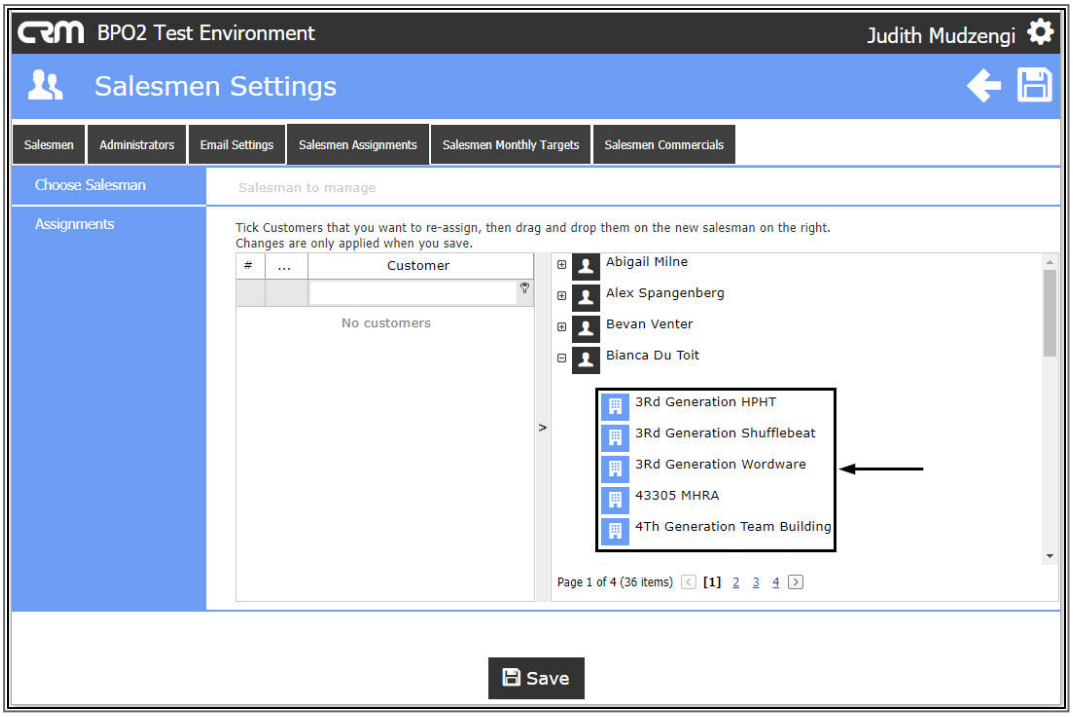

REASSIGN CUSTOMER TO ANOTHER SALESMAN

- If you need to you need to reassign a customer to another salesman, e.g. the salesman has left, or changed selling 'areas'.
    1. In the **Choose Salesman** field,
    2. click on the **down arrow** that pops up when you hover over the **Choose Salesman text box**.

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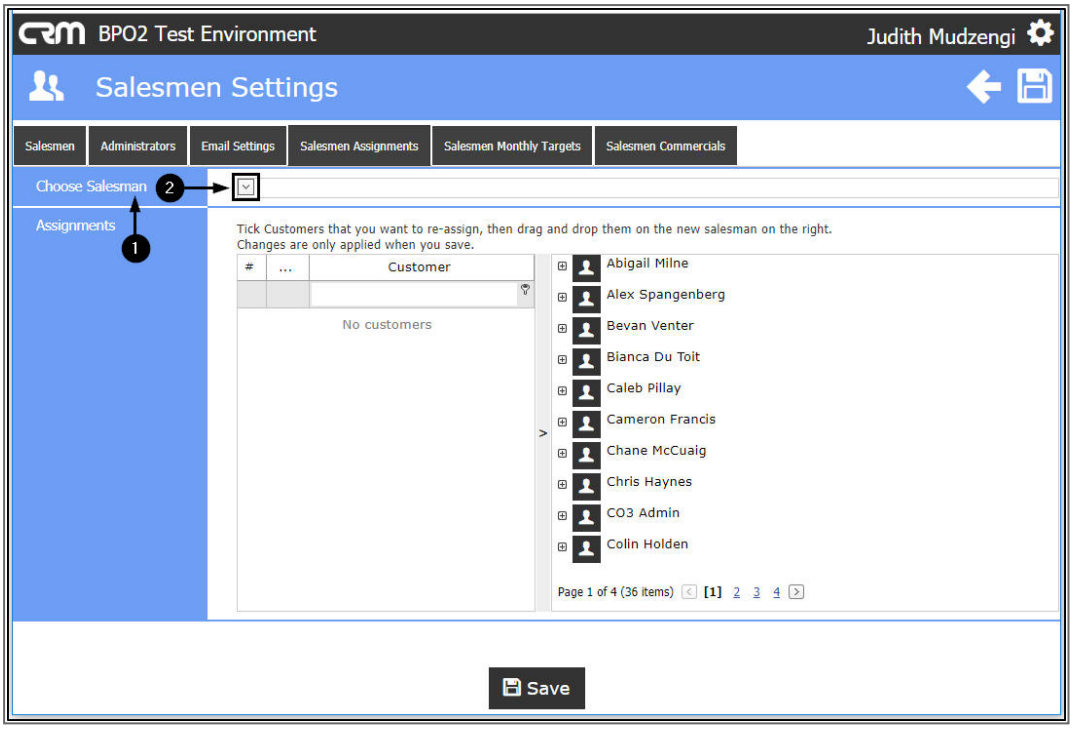
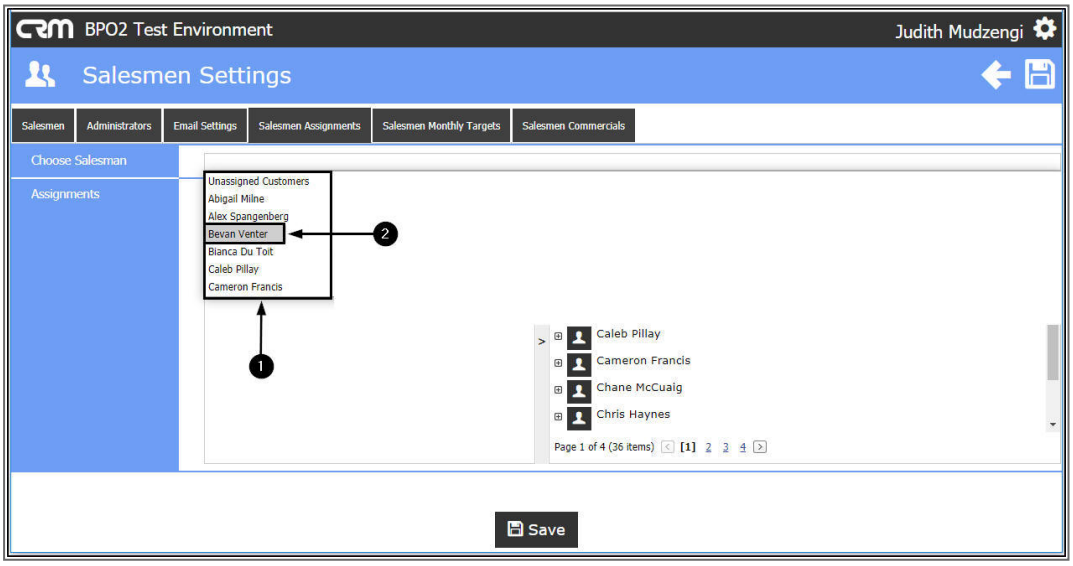


1. A **Salesmen drop-down menu** will be displayed.
2. Select the relevant salesman.
    - In this image, **Bevan Venter** has been selected.



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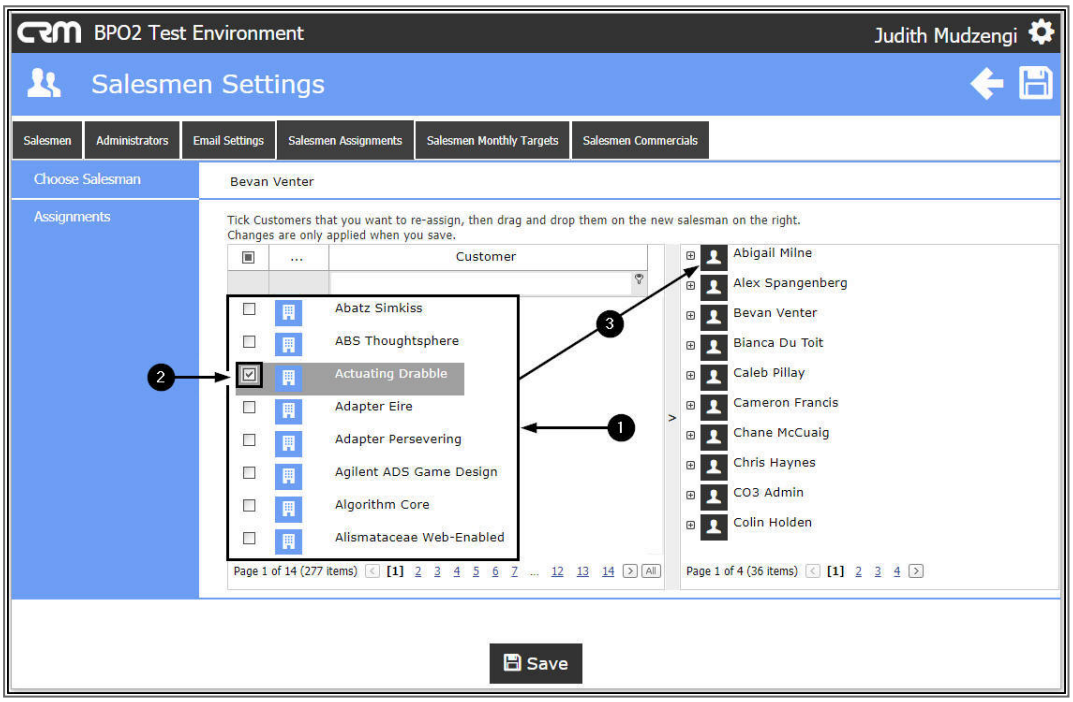
1. A list of customers will come up, where this salesman is the default salesman.
2. Select the customer(s) that need to be re-assigned, by ticking the **check box(es)**.
3. Drag and drop the customer(s) to the relevant Salesman. When reassigning a customer, all related cases, reminders and recommendations for the salesman are reassigned to the new salesman.
    - In this image, customer **Actuating Drabble** is being reassigned from **Bevan Venter** to **Abigail Milne**.



- The customer will no longer be displayed in the customers list of the previous salesman.
    - In this image, **Actuating Drabble** is no longer displayed in **Bevan Venter**'s customer list.

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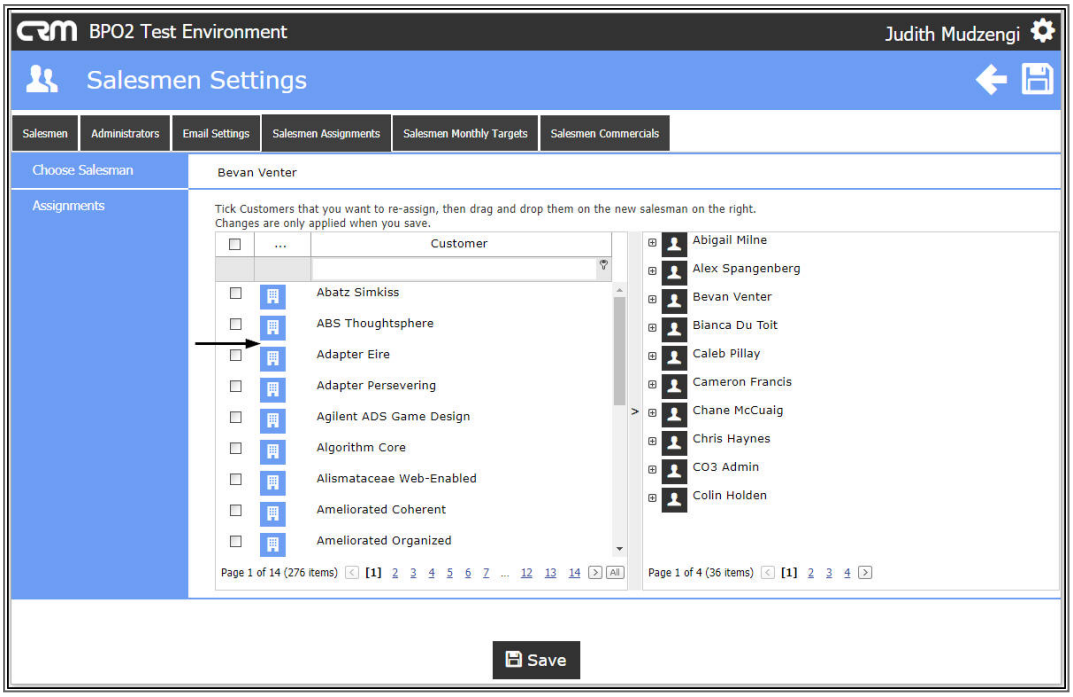

1. Click on the **Expand** button to view the current salesman's customers list.
2. The customer will now be displayed in the current salesman's customer list.
    - In this image, customer **Actuating Drabble** is now displayed in **Abigail Milne**'s customer list.
3. Click on **Save**.
    - **Note**: Remember to maximise the screen if you do not see the **Save** button.

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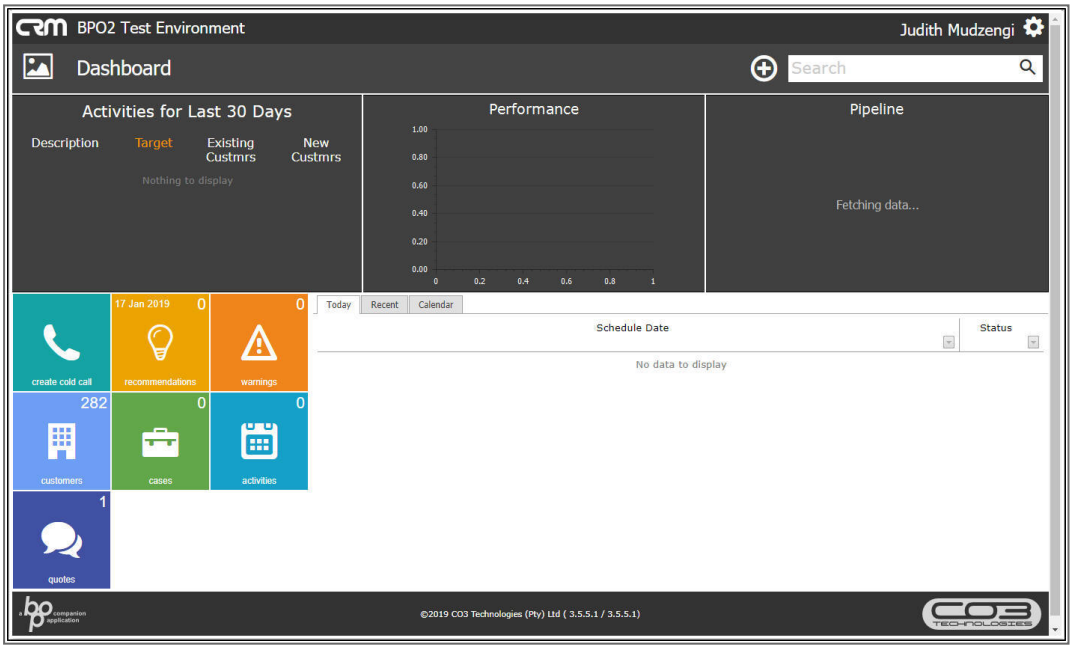
- You will return to the **Dashboard**.



CRM.003.009

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