

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

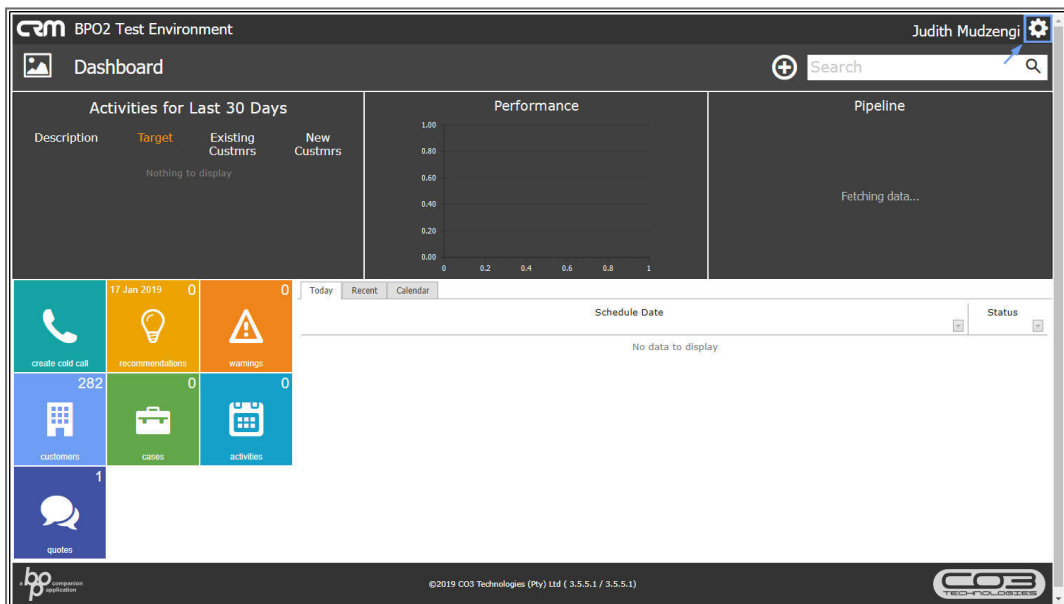
## CRM SETTINGS

### SALESMEN COMMERCIALS

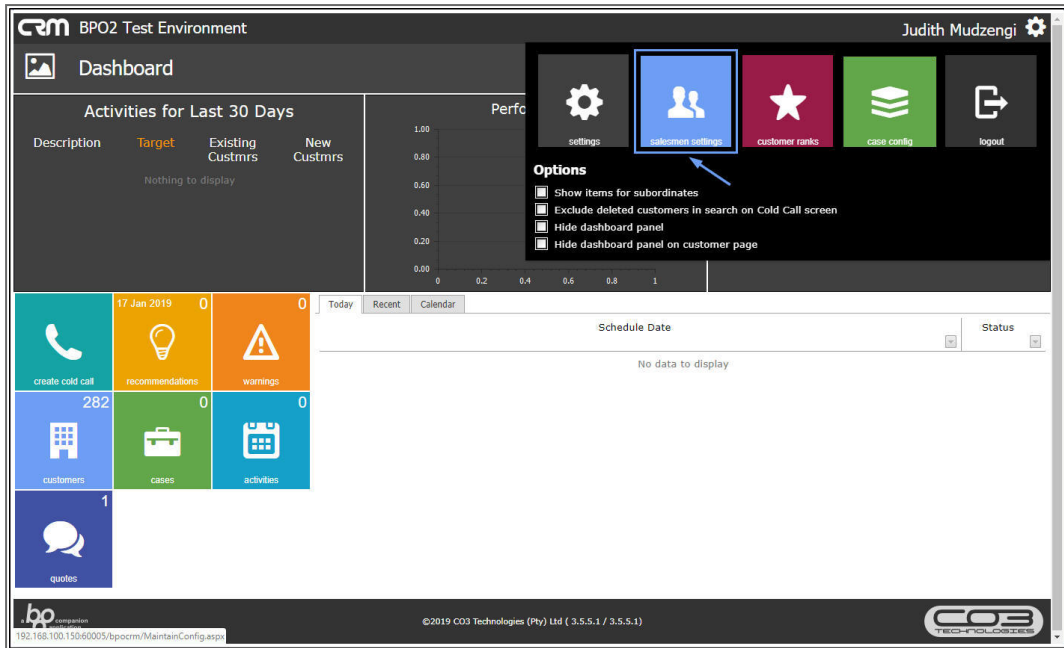
- The **Salesmen Commercials** option is for linking commercials created in **BPO** to salesmen in **CRM**.
- This will be used in **BPO Sales Studio** quotes to allocate individual salesman unit costs.

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

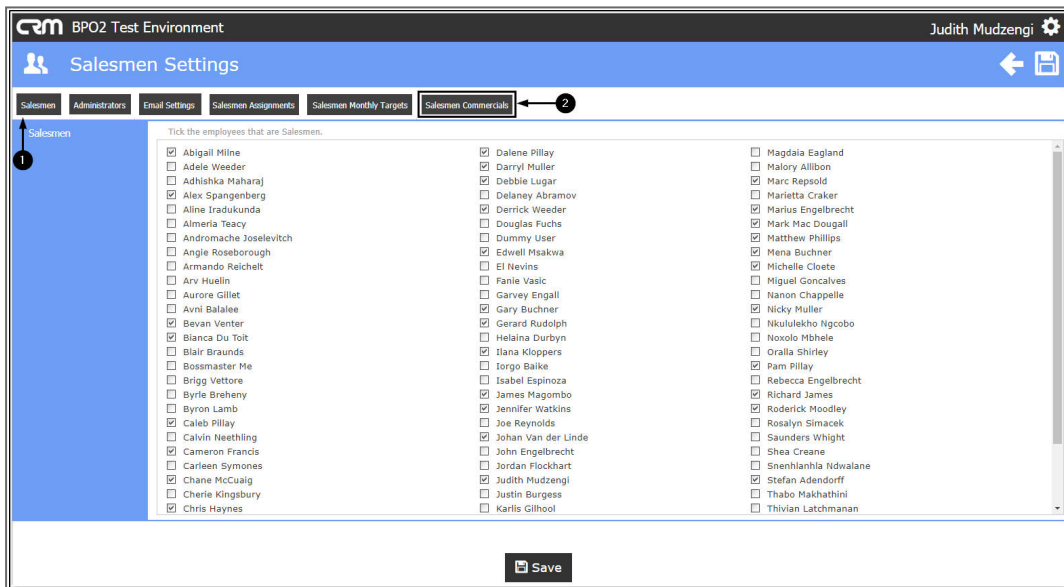
- Click on the **Settings** button to the right of your **UserName**.



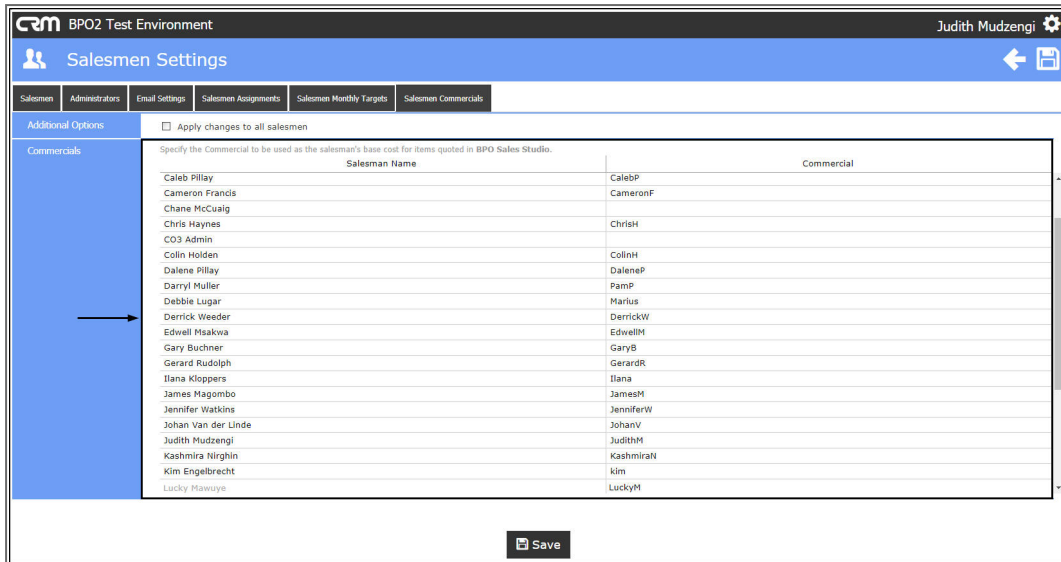
- The session **Options** page will pop up.
- Click on the **Salesmen Settings** tile.



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

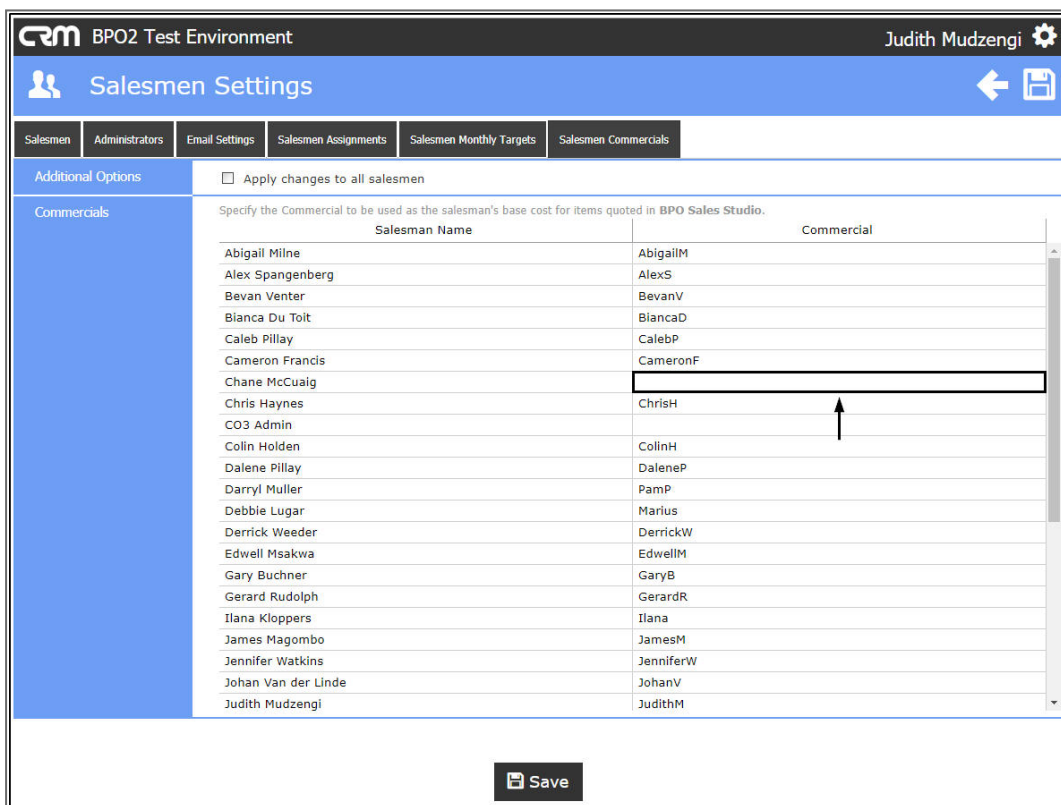


- A list of all salesmen with their respective commercials will be displayed.

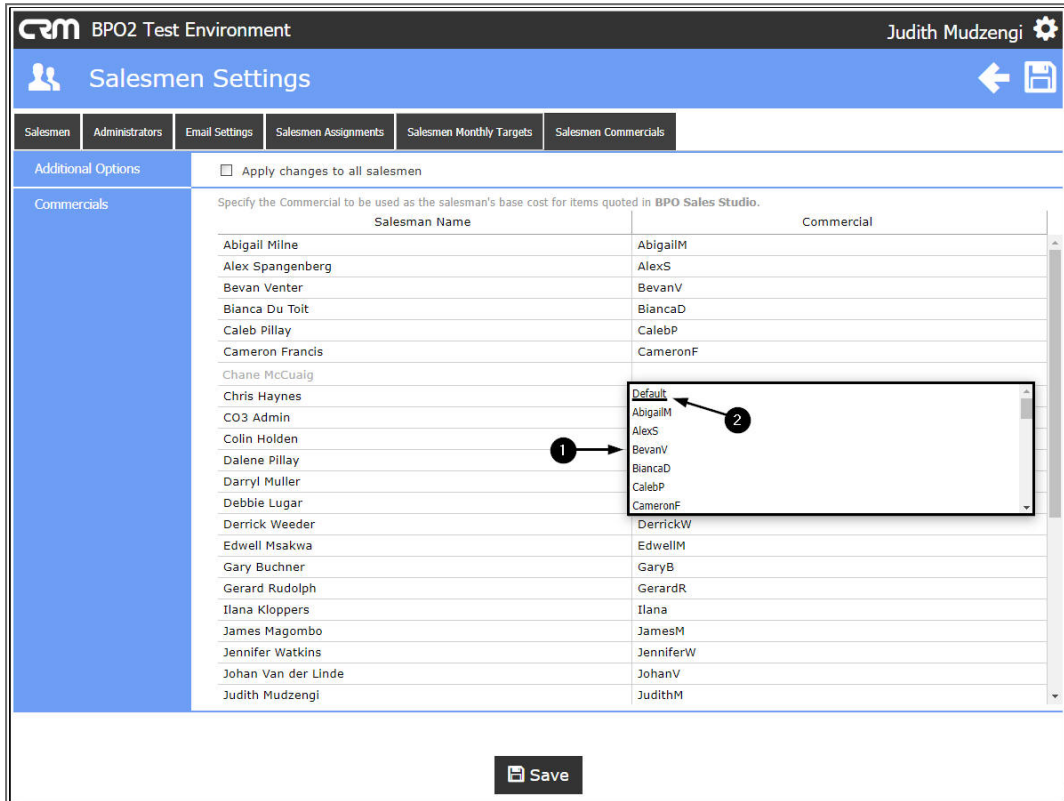


## Link A Commercial To A Salesman

- Click on the **Commercial** textbox of the Salesman you wish to link a commercial to.



1. A **menu** will be displayed.
  - **Note:** If the menu is not displayed, click on the **Commercial textbox** again.
2. Select the relevant commercial.
  - In this image, **Default** commercial has been selected.



1. The **Commercial textbox** will now be populated with the selected **Commercial**.
2. Click on the **Save** button or
3. **Save** icon.

CRM BPO2 Test Environment Judith Mudzengi

Salesmen Settings

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials

Additional Options  Apply changes to all salesmen

Commercials Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Bianca Du Toit	BiancaD
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCuaig	Default
Chris Haynes	ChrisH
CO3 Admin	Default
Collin Holden	CollinH
Dalene Pillay	DaleneP
Darryl Muller	PamP
Debbie Lugar	Marius
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	GerardR
Iilana Kloppers	Iilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	JohanV
Judith Mudzengi	JudithM

Save

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

CRM BPO2 Test Environment Judith Mudzengi

Dashboard

Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Nothing to display			

Performance

Pipeline

Fetching data...

Today Recent Calendar

Schedule Date Status

No data to display

create cold call 17 Jan 2019 0 0

recommendations 0 0

warnings 0 0

customers 282

cases 0

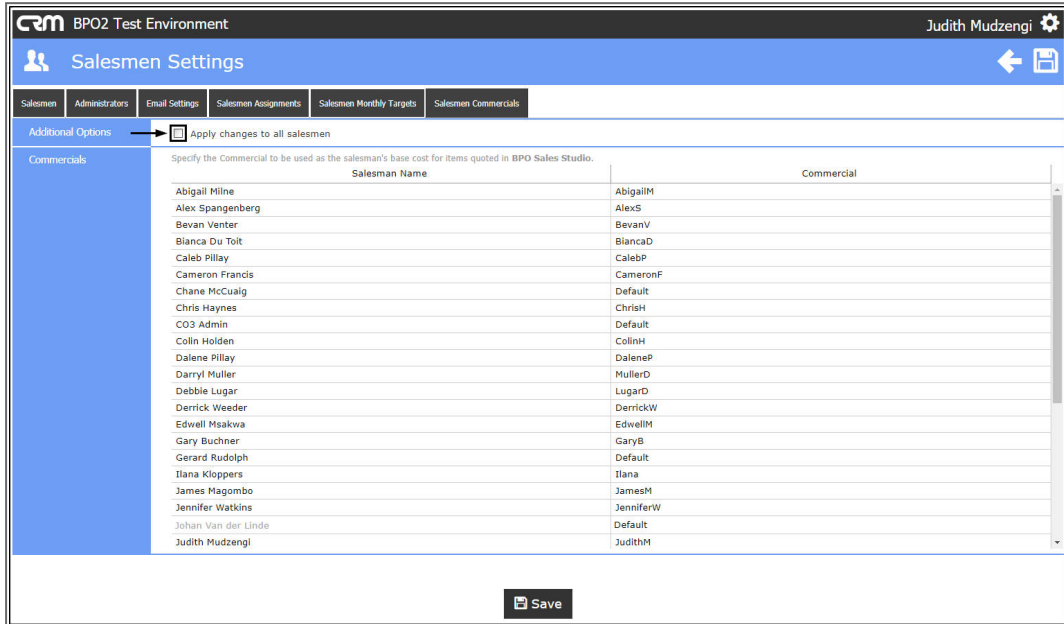
activities 0

quotes 1

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## LINK A COMMERCIAL TO ALL SALESMEN

- Click on the **Apply changes to all salesmen** checkbox.



- A message box will pop up asking you;
  - **Are you sure you want to apply any changes you make to all salesmen? You cannot undo the changes.**
- Click on **Ok**.

CRM BPO2 Test Environment

192.168.100.150:60005 says  
 Are you sure you want to apply any changes you make to all salesmen?  
 You cannot undo these changes.

Judith Mudzenzi

Salesmen Settings

Salesmen

Administrators

Email Settings

Salesmen Assignments

Salesmen Monthly Targets

Salesmen Commercials

Additional Options

Apply changes to all salesmen

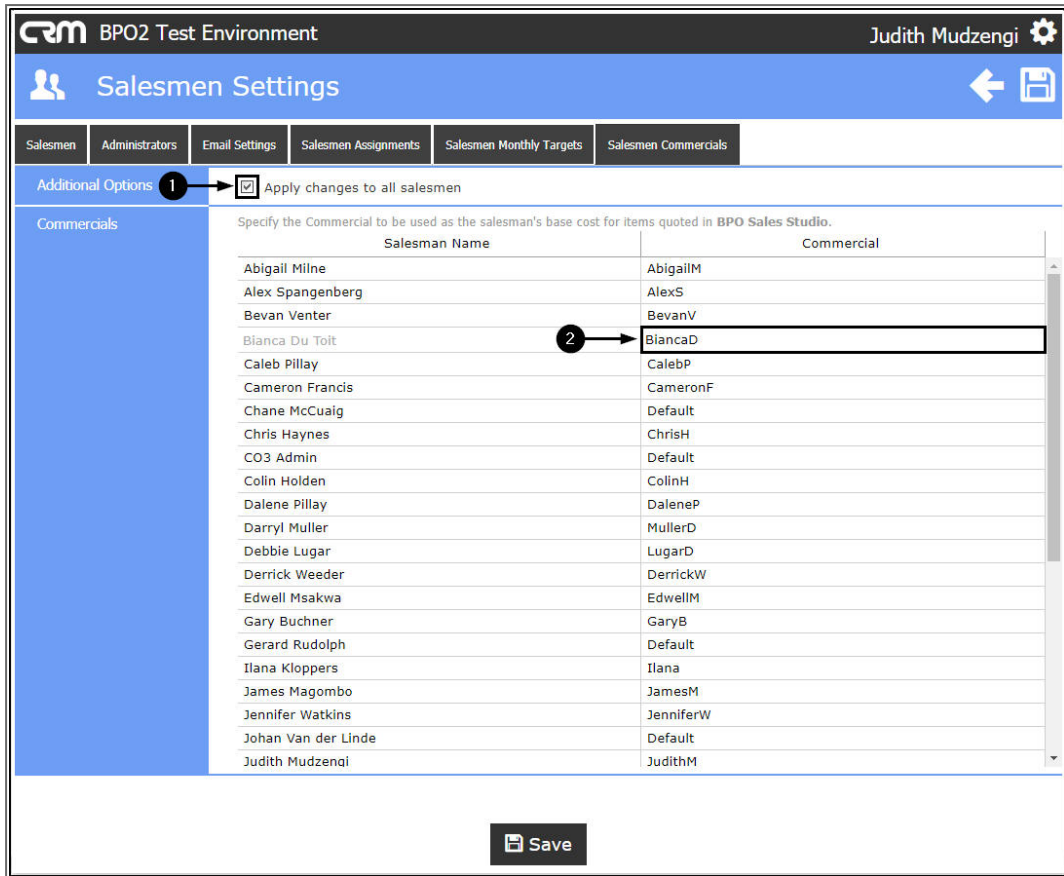
Commercials

Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Bianca Du Toit	BiancaD
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCuaig	Default
Chris Haynes	ChrisH
CO3 Admin	Default
Colin Holden	ColinH
Dalene Pillay	DaleneP
Darryl Muller	MullerD
Debbie Lugar	LugarD
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	Default
Ilana Kloppers	Ilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	Default
Judith Mudzenzi	JudithM

Save

1. The **Apply changes to all salesmen checkbox** will become marked.
2. Click on the **Commercial textbox** of any Salesman.



1. A **menu** will be displayed.
  - **Note:** If the menu is not displayed, click on the **Commercial textbox** again.
2. Select the relevant commercial.
  - In this image, **Default** commercial has been selected.



CRM BPO2 Test Environment Judith Mudzengi

## Salesmen Settings

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials

Additional Options  Apply changes to all salesmen

Commercials Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
Abigail Milne	AbigailM
Alex Spangenberg	AlexS
Bevan Venter	BevanV
Bianca Du Toit	BiancaD
Caleb Pillay	Default
Cameron Francis	AbigailM
Chane McCuaig	AlexS
Chris Haynes	BevanV
CO3 Admin	BiancaD
Colin Holden	CalebP
Dalene Pillay	CameronF
Darryl Muller	DaleneP
Debbie Lugar	MullerD
Derrick Weeder	LugarD
Edwell Msakwa	DerrickW
Gary Buchner	EdwellM
Gerard Rudolph	GaryB
Ilana Kloppers	Default
James Magombo	Ilana
Jennifer Watkins	JamesM
Johan Van der Linde	JenniferW
Judith Mudzengi	Default
	JudithM

Save

- A message box will pop up asking you;
  - **Are you sure you want to apply any changes you make to all salesmen? You cannot undo these changes.**
- Click on **Ok**,
- then click any where in the **Commercial** datagrid.

CRM BPO2 Test Environment

192.168.100.150:60005 says  
 Are you sure you want to apply any changes you make to all salesmen?  
 You cannot undo these changes.

Judith Mudzengi

👤 Salesmen Settings

Salesmen

Administrators

Email Settings

Salesmen Assignments

Salesmen Monthly Targets

Salesmen Commercials

Additional Options

Apply changes to all salesmen

Commercials

Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

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Bevan Venter	BevanV
Bianca Du Toit	BiancaD
Caleb Pillay	Default
Cameron Francis	AbigailM
Chane McCuaig	AlexS
Chris Haynes	BevanV
CO3 Admin	BiancaD
Colin Holden	CalebP
Dalene Pillay	CameronF
Darryl Muller	DaleneP
Debbie Lugar	MullerD
Derrick Weeder	LugarD
Edwell Msakwa	DerrickW
Gary Buchner	EdwellM
Gerard Rudolph	GaryB
Ilana Kloppers	Default
James Magombo	Ilana
Jennifer Watkins	JamesM
Johan Van der Linde	JenniferW
Judith Mudzengi	Default
	JudithM

Save

1. The selected **Commercial** will now be linked to all the salesmen.
2. Click on the **Save** button or
3. **Save** icon.

CRM BPO2 Test Environment Judith Mudzengi

## Salesmen Settings

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets **Salesmen Commercials**

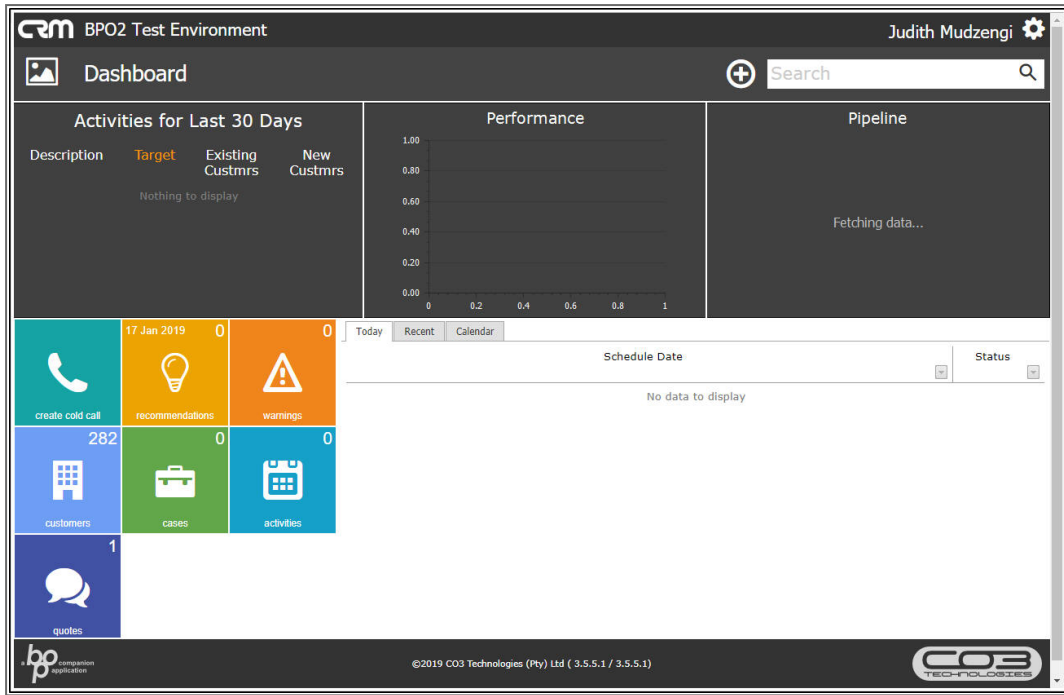
Apply changes to all salesmen

Commercials Specify the Commercial to be used as the salesman's base cost for items quoted in BPO Sales Studio.

Salesman Name	Commercial
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Alex Spangenberg	Default
Bevan Venter	Default
Bianca Du Toit	Default
Caleb Pillay	Default
Cameron Francis	Default
Chane McCuaig	Default
Chris Haynes	Default
CO3 Admin	Default
Colin Holden	Default
Dalene Pillay	Default
Darryl Muller	Default
Debbie Lugar	Default
Derrick Weeder	Default
Edwell Msakwa	Default
Gary Buchner	Default
Gerard Rudolph	Default
Ilana Kloppers	Default
James Magombo	Default
Jennifer Watkins	Default
Johan Van der Linde	Default
Judith Mudzengi	Default

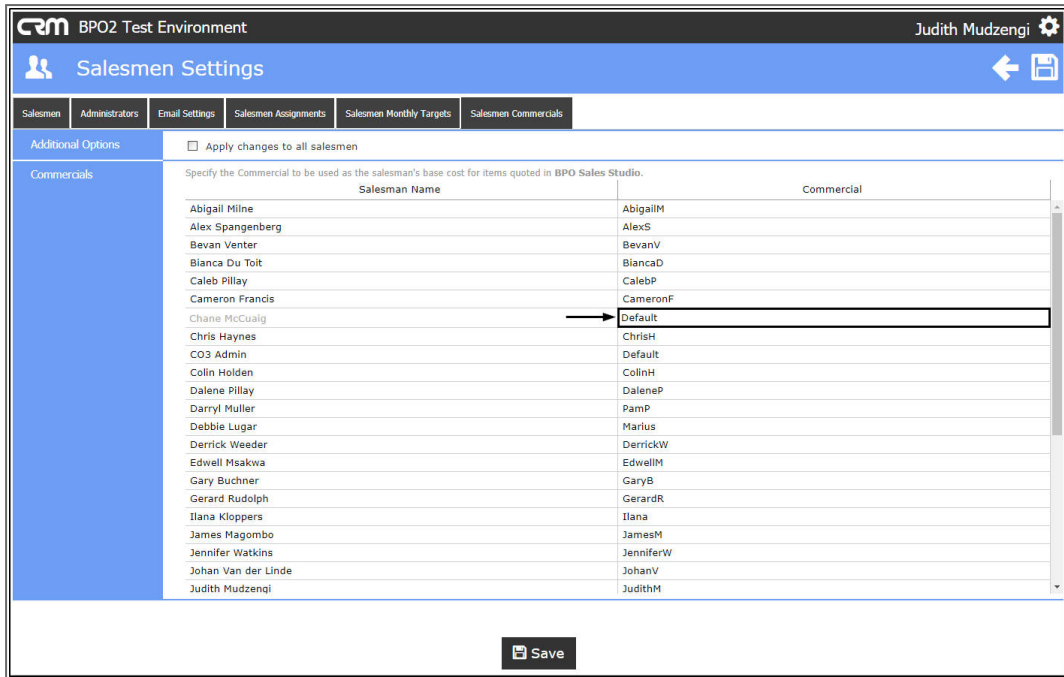
Save

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

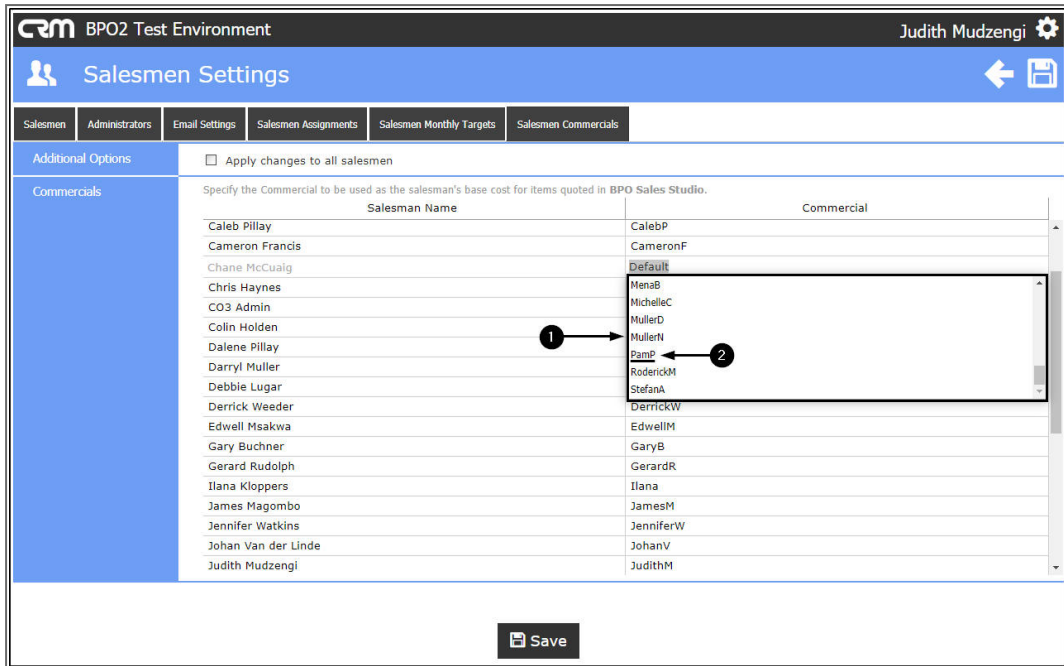


## EDIT A SALESMAN COMMERCIAL

- Click on the **Commercial textbox** of the Salesman you wish to edit the commercial for.



1. A **menu** will be displayed.
  - **Note:** If the menu is not displayed, click on the **Commercial textbox** again.
2. Select the relevant commercial.
  - In this image, **PamP** commercial has been selected.



1. The **Commercial** textbox will now be populated with the selected commercial.
2. Click on the **Save** button or
3. **Save** icon.

CRM BPO2 Test Environment Judith Mudzengi

**Salesmen Settings**

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials

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Bianca Du Toit	BiancaD
Caleb Pillay	CalebP
Cameron Francis	CameronF
Chane McCuaig	PamP
Chris Haynes	ChrisH
CO3 Admin	Default
Colin Holden	ColinH
Dalene Pillay	DaleneP
Darryl Muller	PamP
Debbie Lugar	Marius
Derrick Weeder	DerrickW
Edwell Msakwa	EdwellM
Gary Buchner	GaryB
Gerard Rudolph	GerardR
Ilana Kloppers	Ilana
James Magombo	JamesM
Jennifer Watkins	JenniferW
Johan Van der Linde	JohanV
Judith Mudzengi	JudithM

Save

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

The screenshot shows a CRM dashboard for a user named Judith Mudzengi. The dashboard is titled "CRM BPO2 Test Environment" and includes a search bar and a "Dashboard" tab. The main content area is divided into several sections:

- Activities for Last 30 Days:** A table with columns for "Description", "Target", "Existing Custmrs", and "New Custmrs". It currently displays "Nothing to display".
- Performance:** A line chart with a y-axis ranging from 0.00 to 1.00 and an x-axis with values 0, 0.2, 0.4, 0.6, 0.8, and 1. The chart area is currently empty.
- Pipeline:** A section that is currently displaying "Fetching data..."
- Summary Widgets:** A grid of six widgets 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 currently displays "No data to display".

The footer of the dashboard includes the CO3 Technologies logo, the text "©2019 CO3 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1)", and a small "bp" logo.

CRM.003.010