

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

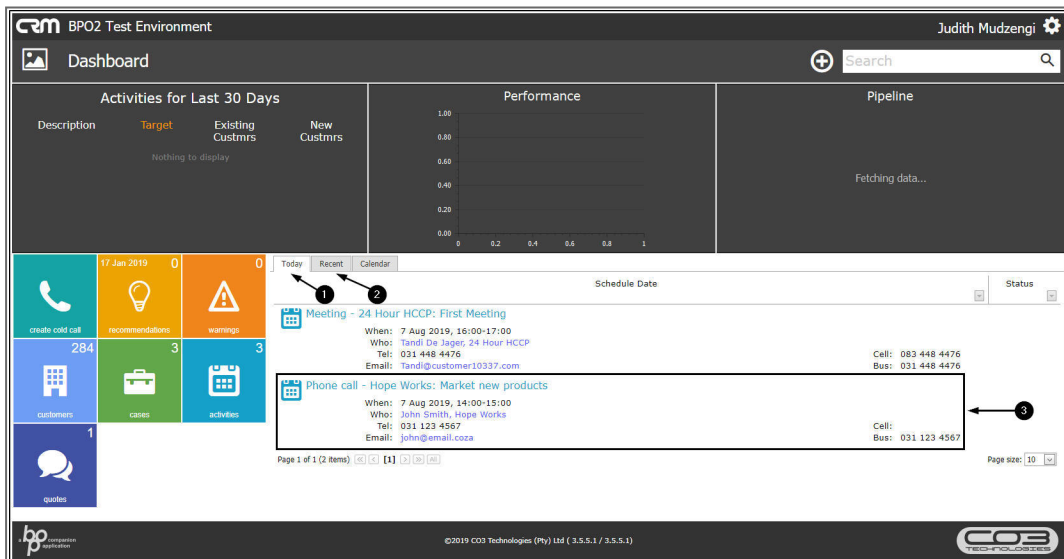
CRM CUSTOMERS

SALESMEN

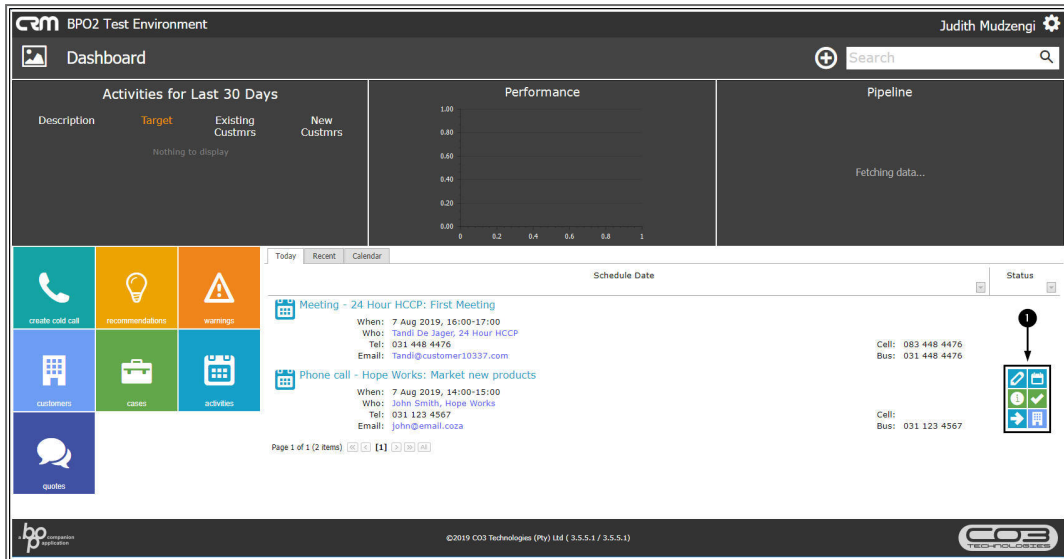
Salesmen will list all linked Salesmen for the selected customer.

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

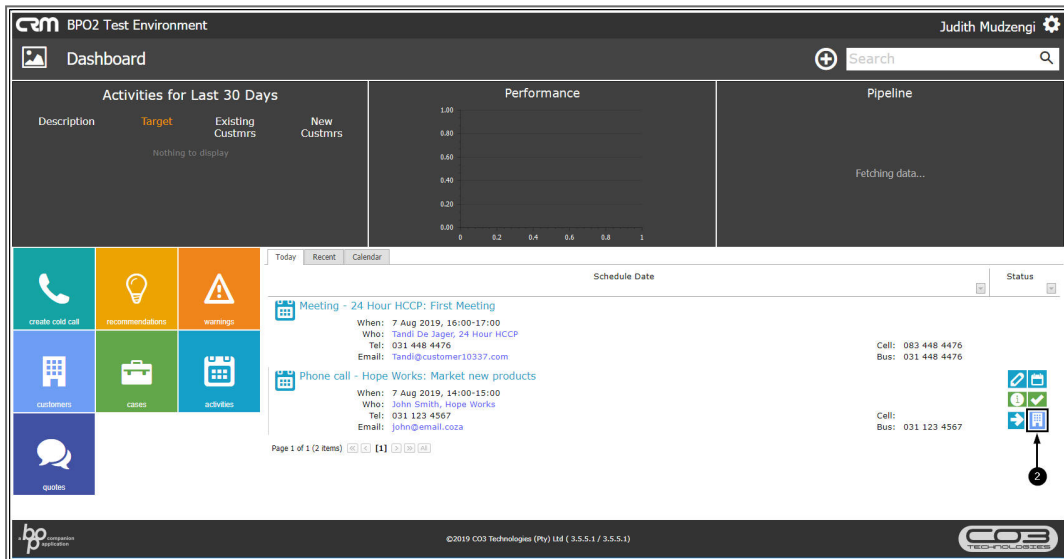
1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view salesmen for.



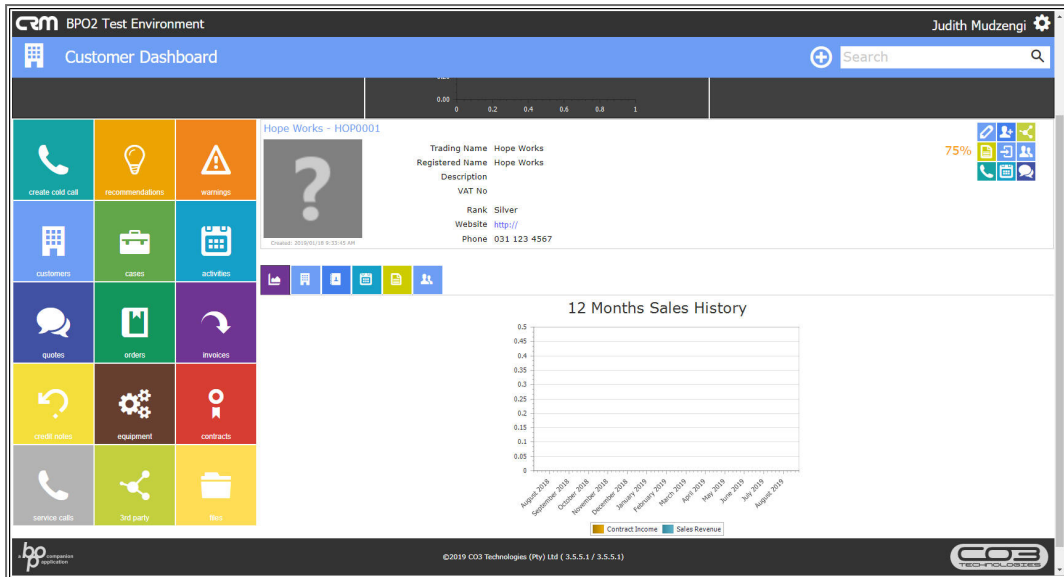
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



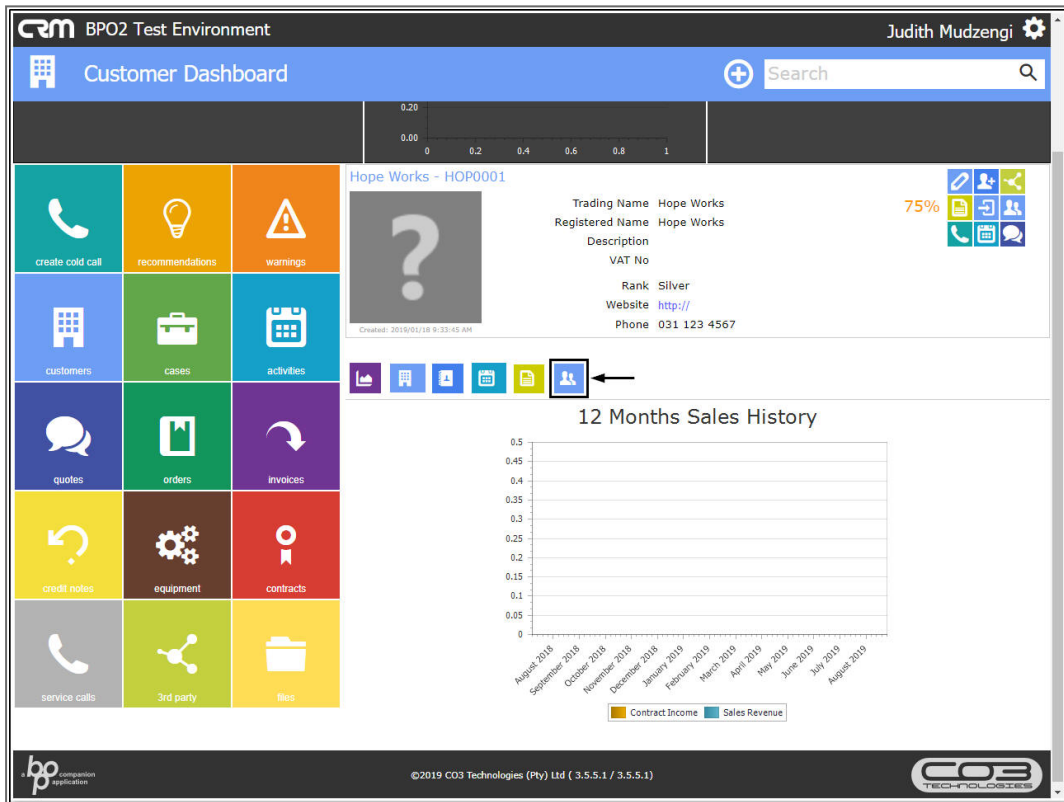
2. Click on the **View Customer** icon.



- The **Customer Dashboard** will be displayed.



- Click on the **Salesmen** icon.



- You can now view salesmen linked to this customer. If you want to make changes to the linked Salesmen, refer to Customer Details - **Maintain Customer Salesmen**.

The screenshot shows the CRM interface for a customer named 'Hope Works - HOP0001'. The dashboard includes a navigation grid on the left with icons for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area displays the customer's details, including a progress bar at 75%, a 'Created' timestamp, and a list of associated salesmen.

Trading Name	Hope Works
Registered Name	Hope Works
Description	
VAT No	
Rank	Silver
Website	http://
Phone	031 123 4567

Abigail Milne	083 730 7300
abigail.milne@co3.co.za	031 730 7300
Judith Mudzengi	083 084 0839
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