

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

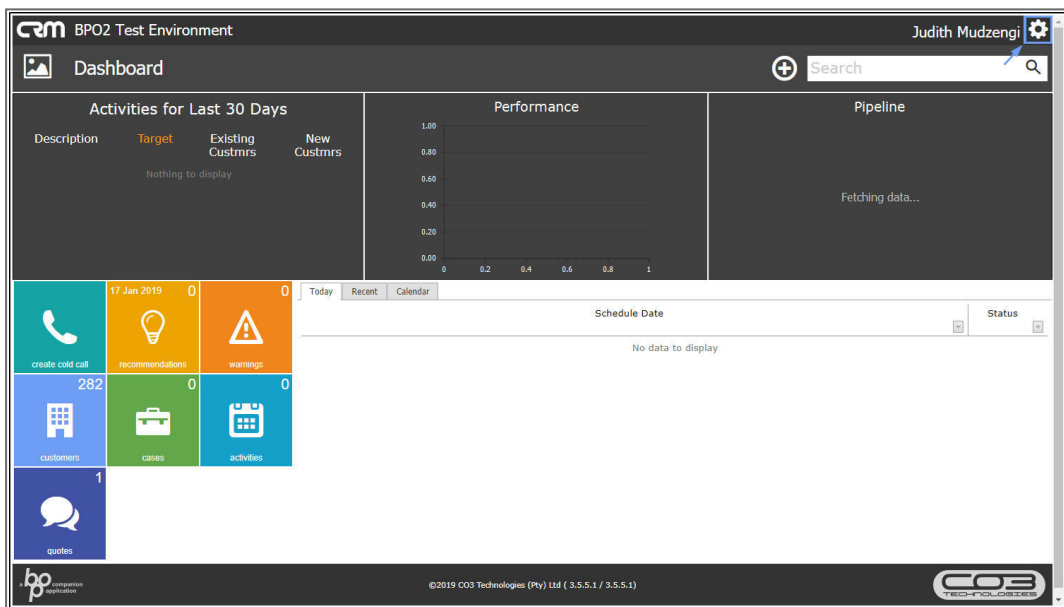
CRM SETTINGS

SALESMEN SETTINGS

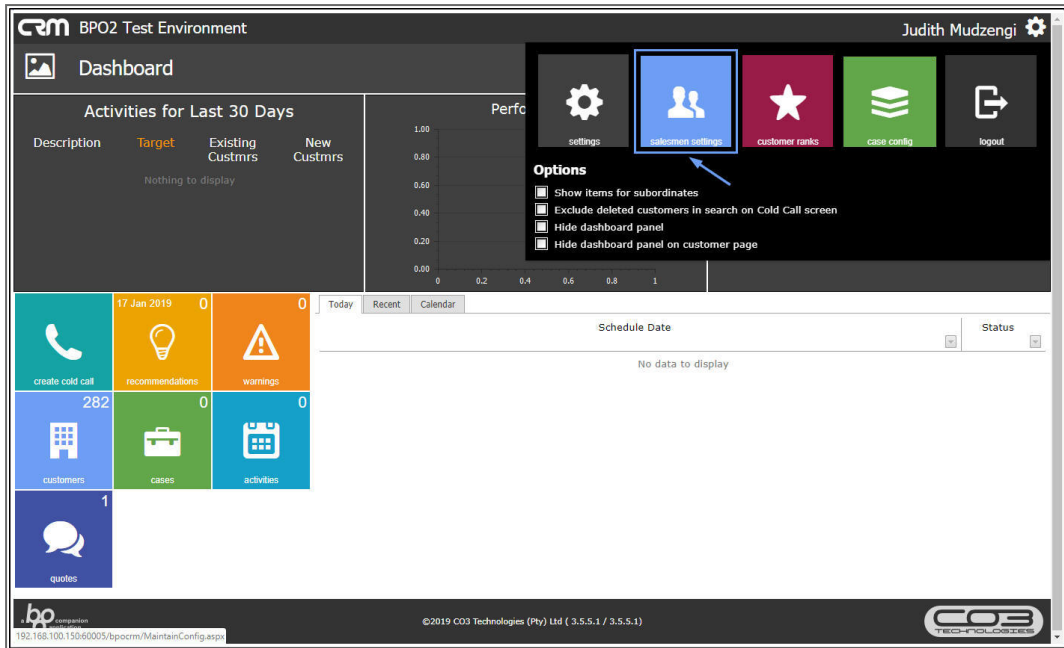
Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

CONFIGURE SALESMEN

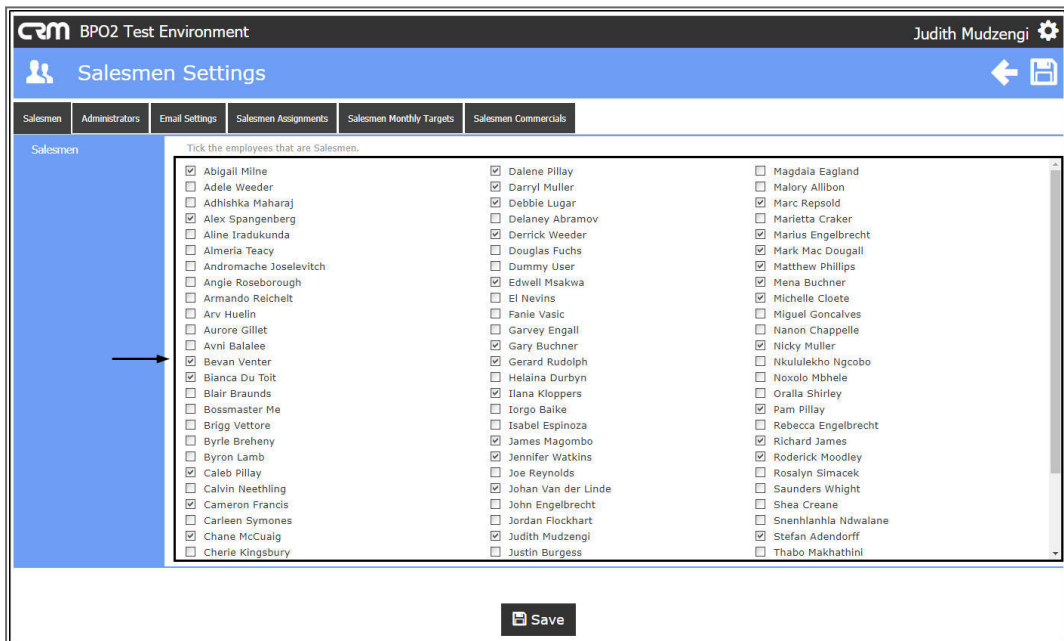
- Click on the **Settings** button to the right of your **UserName**.



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



- The **Salesmen Settings** screen will be displayed.



1. Within the **Salesmen** tab,
2. The **Salesmen** section lists all employees in the system.

3. Tick the **check boxes** for all the employees that are Salesmen.
4. Click on **Save**.

- **Note 1:** Remember to maximise your screen if you do not see the **Save** button.
- **Note 2:** Remember you can also use the **Save** icon at the top right of your screen to save changes.



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

The screenshot shows a CRM dashboard for a test environment. At the top, it says 'CRM BPO2 Test Environment' and 'Judith Mudzengi'. The main area is divided into several sections: 'Activities for Last 30 Days' with columns for Description, Target, Existing Custmrs, and New Custmrs; 'Performance' with a line chart; and 'Pipeline' with a 'Fetching data...' message. Below these are several tiles: 'create cold call' (0), 'recommendations' (17 Jan 2019, 0), 'warnings' (0), 'customers' (282), 'cases' (0), 'activities' (0), and 'quotes' (1). A 'Schedule Date' section shows 'No data to display'. The footer includes '©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)' and the CO3 logo.

CRM.003.002