

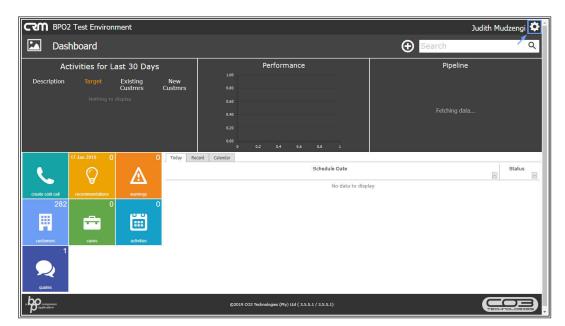
We are currently updating our site; thank you for your patience.

## **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]:[portno]/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.



## **CRM** Administrators

CCM BPO2 Test Environment	Judith Mudzengi 🍄
🖾 Dashboard	
Activities for Last 30 Days Description Target Existing New Custmrs Custmrs Nothing to display	Perfc
17 Jan 2019     0     0     Today       Create cold cold     0     0     0       282     0     0     0       Costomers     cases     activities	Recent Calendar Schedule Date Status I
quates quates 192, 168, 100, 156, 60005, hpp.ccm//MaintainConfig.aspx	@2019 C03 Technologies (Ptr) Ltd ( 3.5.5.1 / 3.5.5.1)

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

Research Salesmen S	bettings			🔶 🗧 🗄
Salesmen Administrators Email Se	ttings Salesmen Assignments Salesmen Monthly Ta	Salesmen Commercials		
Salesmen	ick the employees that are Salesmen.			
	] Abjaji Milne ] Abjaji Milne ] Adlei Weeder ] Adlei Kaka Maharaj ] Alinei Kadukana ] Alinei Tadukunda ] Alinei Tadukunda ] Anironacha Dosellevitch ] Aniro Roseborough ] Armanda Reichelt ] Arni Kellen ] Arranda Reichelt ] Arranda Reichelt ] Arranda Reichelt ] Arranda Sallete ] Beana Venter ] Beana Du Toit ] Beara Du Toit ] Beara Sundis ] Beara Sallete ] Bear	Dalark Huller     Dalark Huller     Deble Lugar     Deble Lugar     Deble Lugar     Delanek Ahrmov     Derrick Wedder     Durglas Fuchs     Durmmy User     Edwell Msakwa     Elweins     Eneivel Msakwa     Garrey Engali     Garrey Engali     Garrey Buchner     Gerard Rudolph     Hellana Durbyn     Ilana Kloopers     Ianak Hagombo     Janes Hagombo     Janes Hagombo     Janes Hagombo     Jonenfler Watkins     Joce Reynolds     John Engebrecht     Jordan Fisckhart     Judn Hurzengl     Judn Hurzengl     Judn Hurzengl     Judn Hurgeng     Judn Hurgeng	Magdaia Eagland Malory Allbon Marc Rappold Marc Rappold Marc Rappold Marc Craker Maritus Engelbracht Mark Mac Dougall Matthew Philips Mana Buchner Miguel Goncalves Nacholic Cloate Miguel Goncalves Nicky Muller Ni	

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



CM BPO2 Test Environment				th Mudzengi
🐫 Salesme	n Settings			🔶 🗧
alesmen Administrators E	mail Settings Salesmen Assignments Salesmen Monthly	Targets Salesmen Commercials		
		sers have full access to ALL CUSTOMERS, so be careful allocating this ac		
	Almeria Teacy	Douglas Fuchs	Mark Mac Dougall	
	Andromache Joselevitch	Dummy User	Matthew Phillips	
	Angle Roseborough	Edwell Msakwa	Mena Buchner	
	Armando Reichelt	El Nevins	Michelle Cloete	
	Arv Huelin	Fanie Vasic	Miguel Goncalves	
	Aurore Gillet	Garvey Engall	Nanon Chappelle	
	Avni Balalee	Gary Buchner	Nicky Muller	
	Bevan Venter	Gerard Rudolph	Nkululekho Ngcobo	
	Bianca Du Toit	Helaina Durbyn	Noxolo Mbhele	
	Blair Braunds	Ilana Kloppers	Oralla Shirley	
	Bossmaster Me	Iorgo Baike	Pam Pillay	
	Brigg Vettore	Isabel Espinoza	Rebecca Engelbrecht	
	Byrle Breheny	James Magombo	Richard James	
	Byron Lamb	Jennifer Watkins	Roderick Moodley	
	Caleb Pillay	Joe Reynolds	Rosalyn Simacek	
	Calvin Neethling	Johan Van der Linde	Saunders Whight	
	Cameron Francis	John Engelbrecht	Shea Creane	
	Carleen Symones	Jordan Flockhart	Snenhlanhla Ndwalane	
	Chane McCuaig	Judith Mudzengi	Stefan Adendorff	
	Cherie Kingsbury	Justin Burgess	Thabo Makhathini	
	Chris Haynes	Karlis Gilhool	Thivian Latchmanan	
	Clevie Huncote	🗹 Kashmira Nirghin	Verusha Govender	
	CO3 Admin	Kessia Maitland	Wasim Khan	
	Cob Charlo	Kim Engelbrecht	Willy Pierce	
	Colin Holden	Leigh Stanborough	Xymenes Capner	
	Cori Clail	Lucky Mawuye		

- 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.

CRM BPO2 Test	Environment			Judith Mudzengi 🌣
🤽 Salesme	en Settings			← 🖪
Salesmen Administrators	Email Settings Salesmen Assignments Salesmen Monthly Ta	rgets Salesmen Commercials		â
Administrators	Tick the employees that are Admentators. These user      Bearn for the second s	e heve fill access to ALL CUSTONEES, en la caneful allocationg this access.	Husuksho Higobo     Husuksho Higobo     Husuk Nihke     Orjali Shiring     Pan Nilay     Pan Nilay     Roback Engelbereht     Robard James     Robard James     Robard James     Social Shiring     So	

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



## **CRM** Administrators

CCM BPO2 Test Environment		Judith Mudzengi 🍄 🅯
🔼 Dashboard	6	Search Q
Activities for Last 30 Days	Performance	Pipeline
Description Target Existing New Custmrs Custmrs	0.80	
Nothing to display	0.60	Fetching data
	0.20	
17 Jan 2019 0 0	0.00 0 0.2 0.4 0.6 0.8 1 Today Recent Calendar	
	Schedule Date	Status
create cold call recommendations warnings	No data to displa	Ŷ
customers cases activities		
quotes	©2019 C03 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1)	

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