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

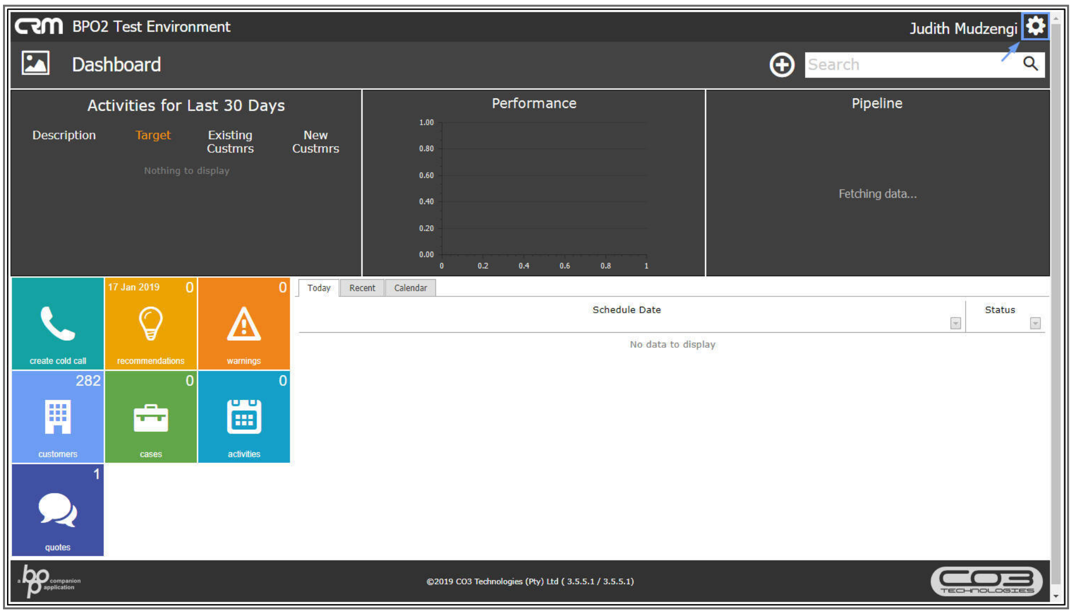
CRM SETTINGS

ADMINISTRATORS

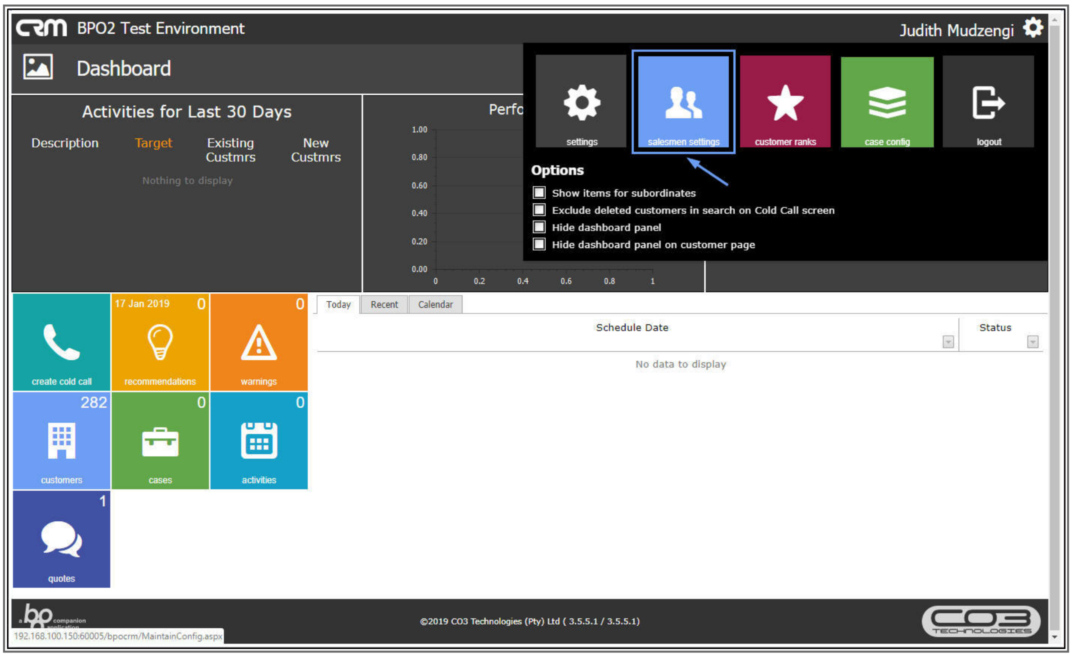
- The Administrator option is for clients where an employee will be creating Cases and Activities on behalf of the Salesman.
- You can select employees who have full access to all customers (be careful allocating this access).

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

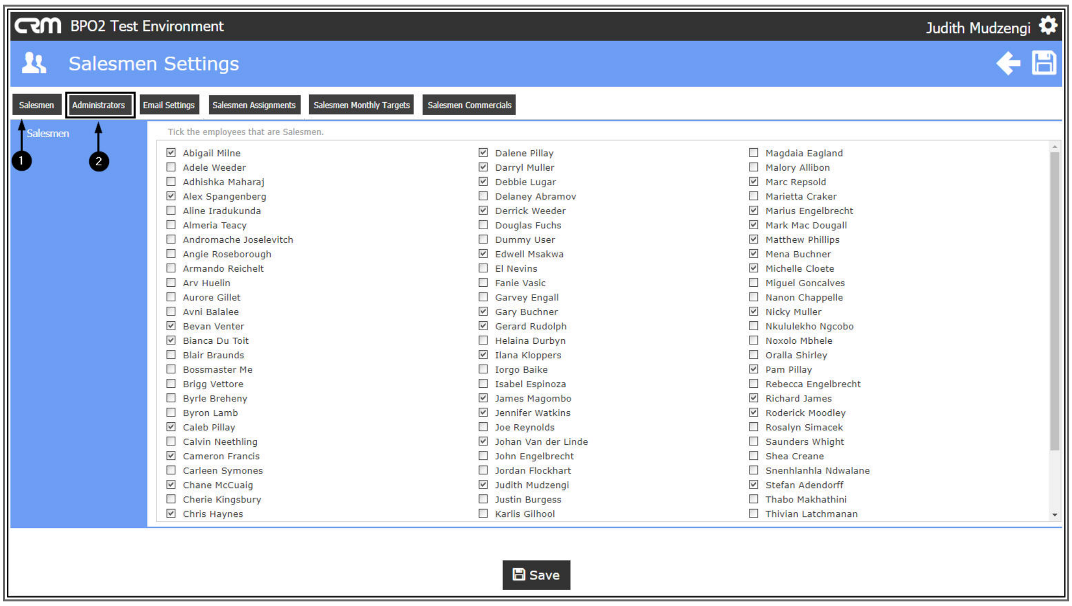
- Click on the **Settings** button to the right of your **UserName**.



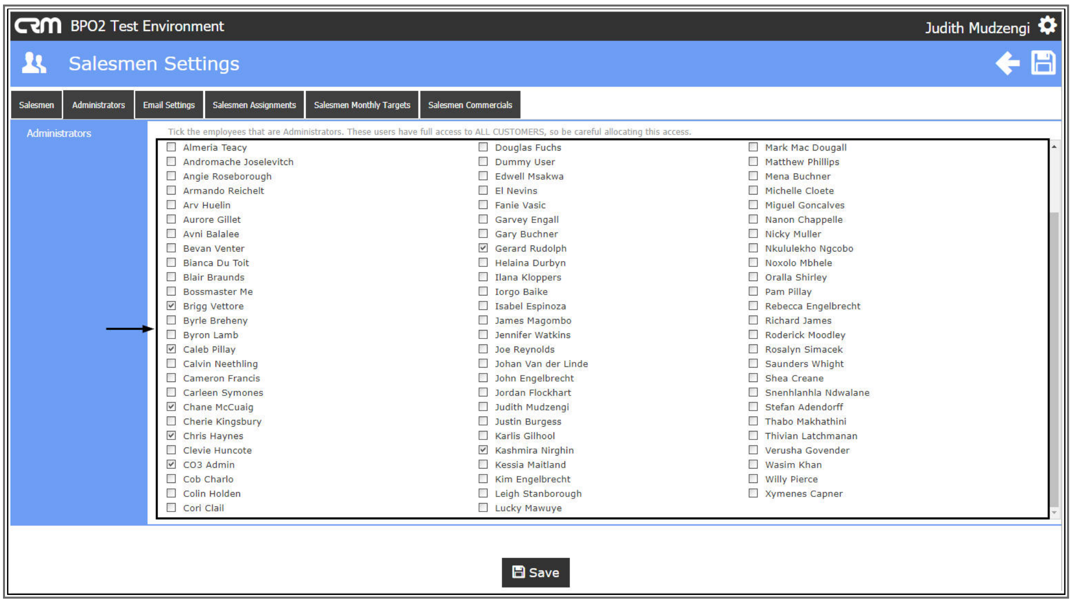
- The session **Options** page will pop up.
- Click on the **Salesmen Settings** tile.



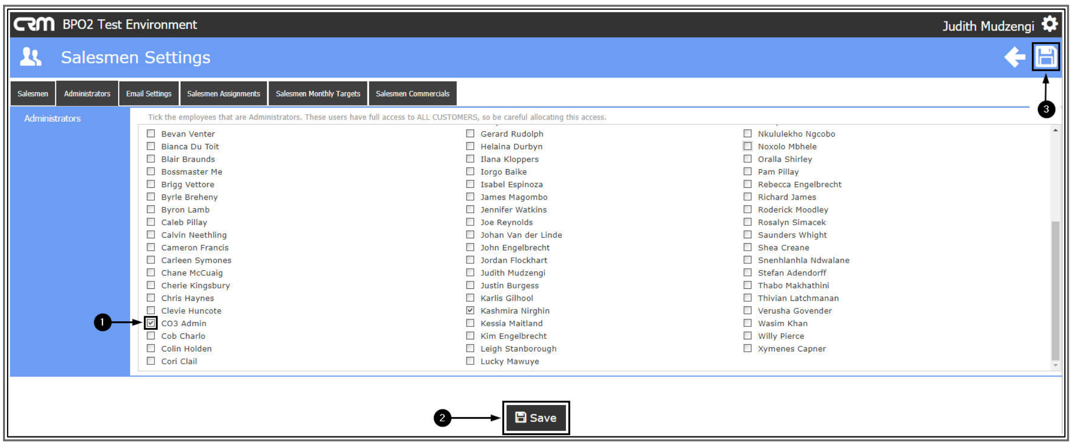
1. The **Salesmen** tab is selected by default.
2. Click on the **Administrators** tab.



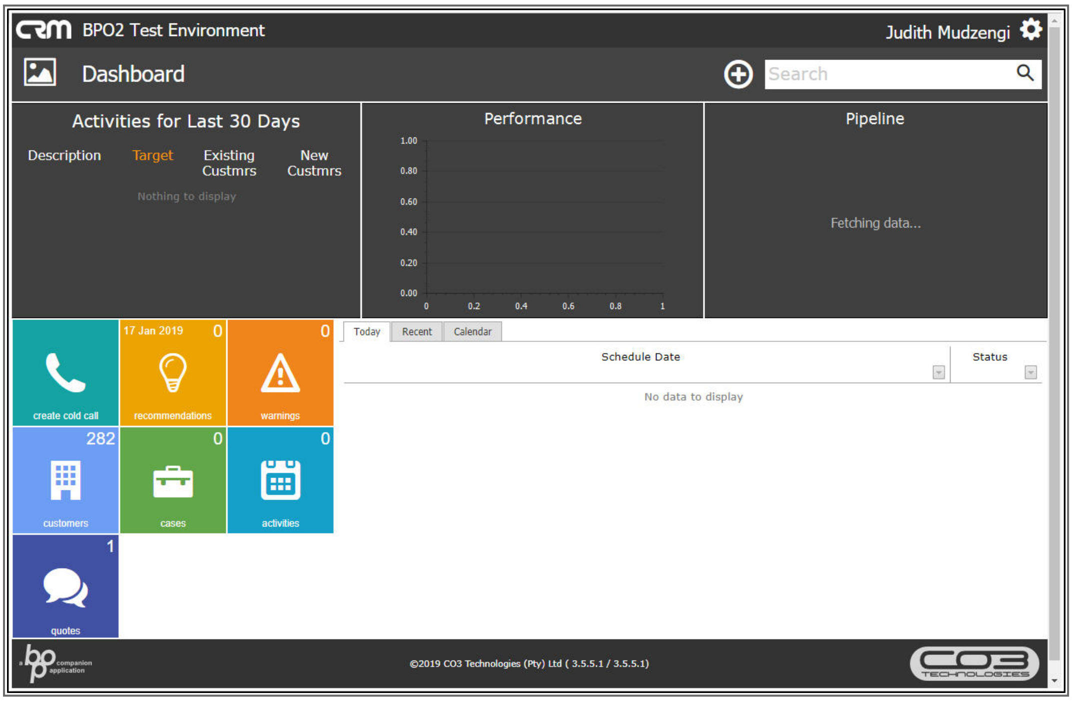
- A list of all employees will be displayed in the **Administrators** section.



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.



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


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...
create cold call
17 Jan 2019
recommendations
warnings
282
customers
cases
activities
quotes
Today
Recent
Calendar
Schedule Date
Status
No data to display
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