

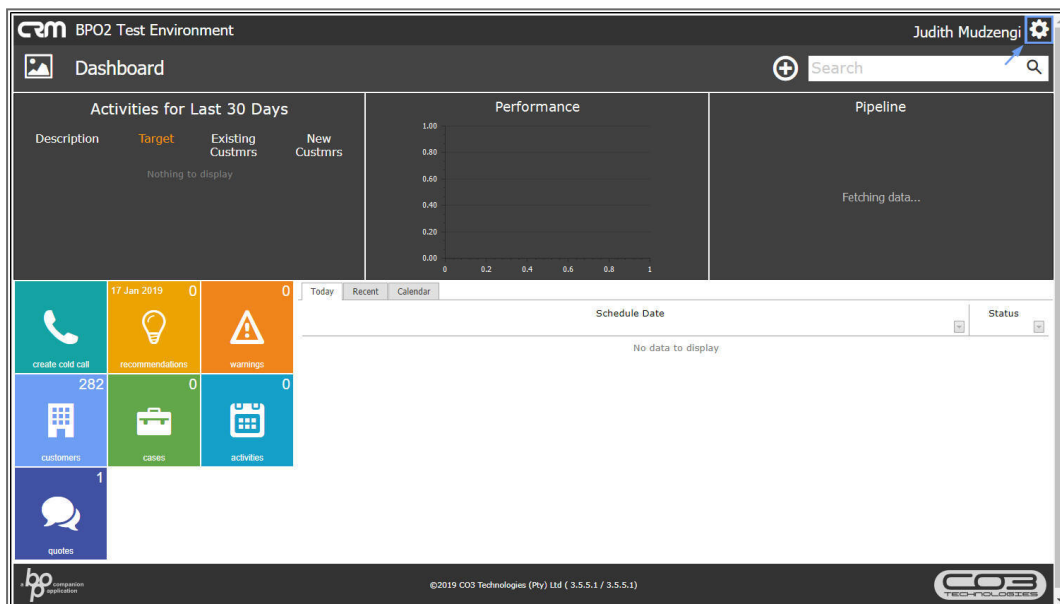
CRM SETTINGS

SALESMEN ASSIGNMENTS

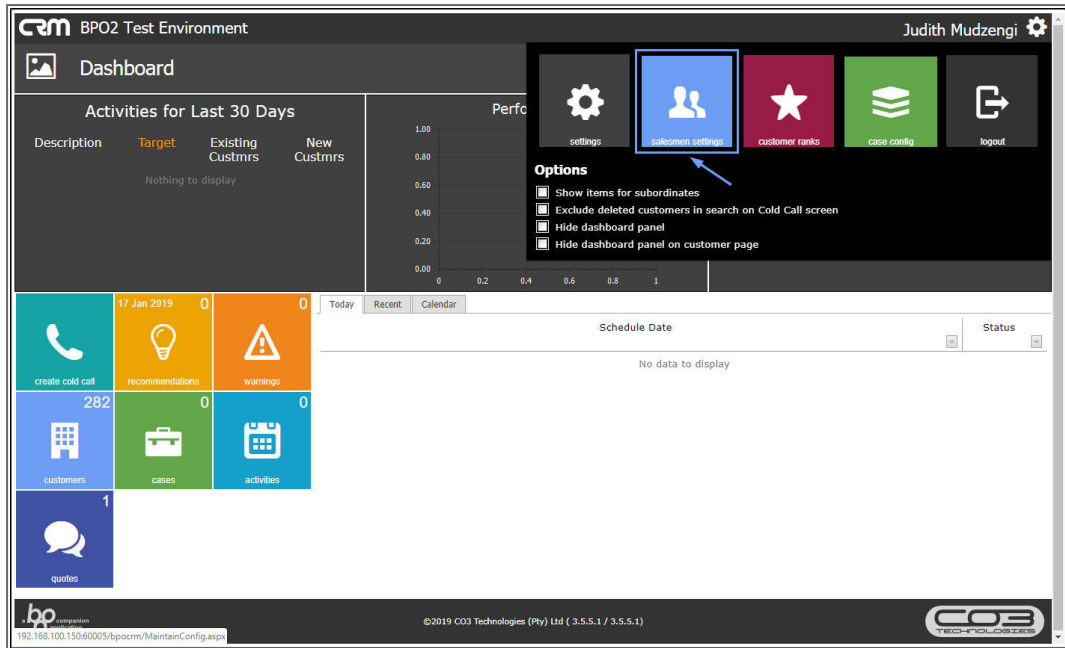
Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

SALESMEN SETTINGS – ASSIGNMENTS

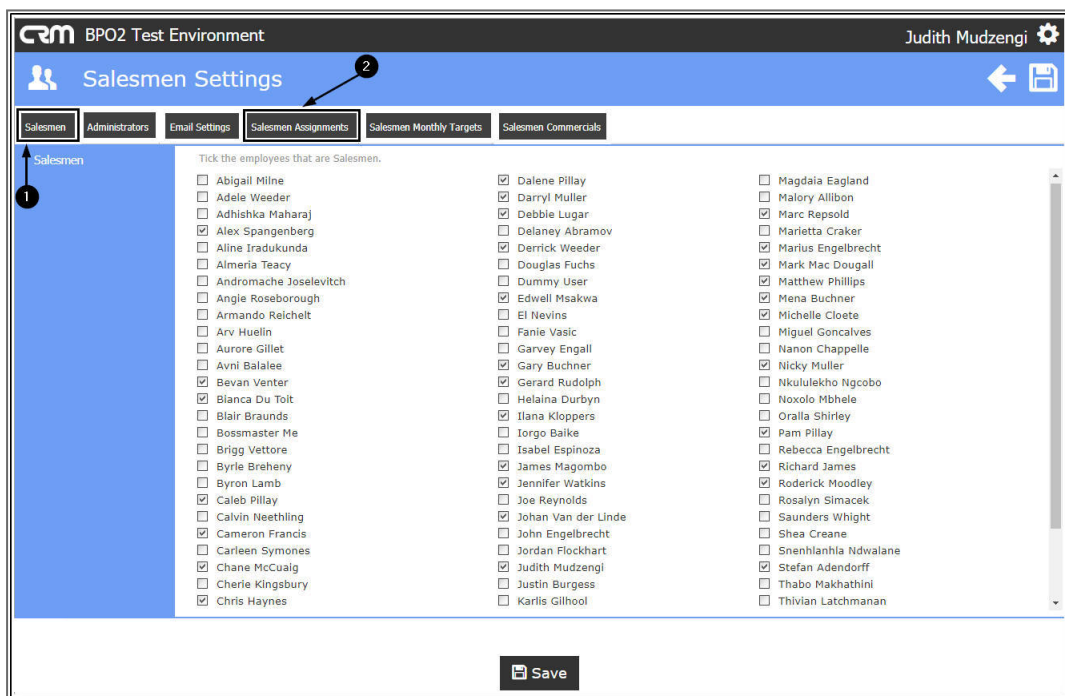
- Click on the **Settings** button to the right of your **UserName**.



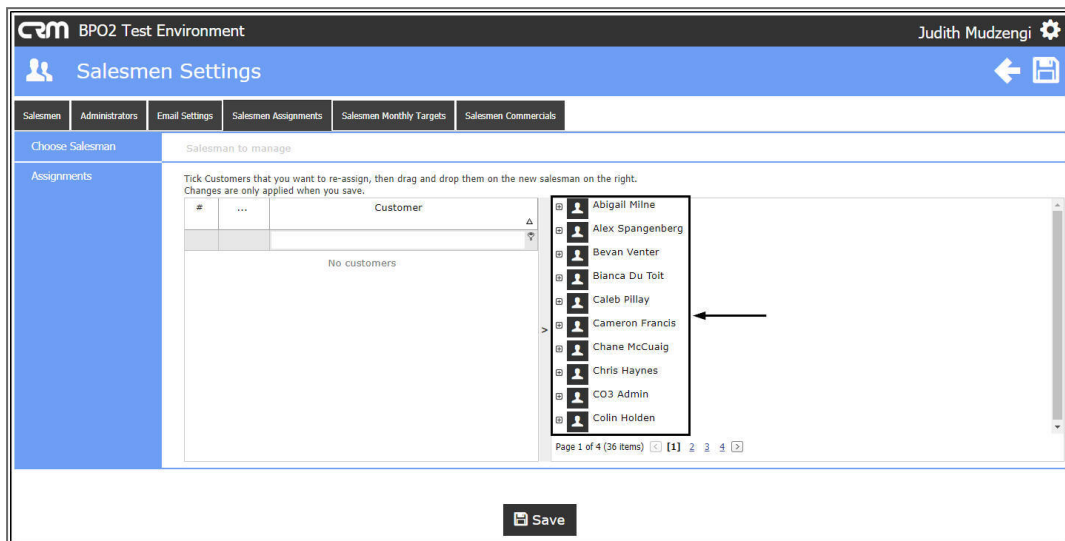
- The session **Options** page will pop up.
- Click on the **Salesmen Settings** tile.



1. The **Salesmen** tab will be selected by default.
2. Click on the **Salesmen Assignments** tab.



- The **Assignments** section will be displayed.
- The Salesmen list on the right hand side will show you a list of Salesmen.



VIEW CUSTOMERS LINKED TO A SALESMAN

- To view customers linked to a salesman (i.e. where the salesman is either the 'main salesman' or 'additional salesman'), click on the **Expand** button.


BPO2 Test Environment

Judith Mudzengi



Salesmen Settings



Salesmen
Administrators
Email Settings
Salesmen Assignments
Salesmen Monthly Targets
Salesmen Commercials

Choose Salesman

Salesman to manage

Assignments

Tick Customers that you want to re-assign, then drag and drop them on the new salesman on the right.
Changes are only applied when you save.

#	...	Customer
		No customers


Abigail Milne


Alex Spangenberg


Bevan Venter


Blanca Du Toit


Caleb Pillay


Cameron Francis


Chane McCuaig


Chris Haynes


CO3 Admin


Colin Holden

Page 1 of 4 (36 items)

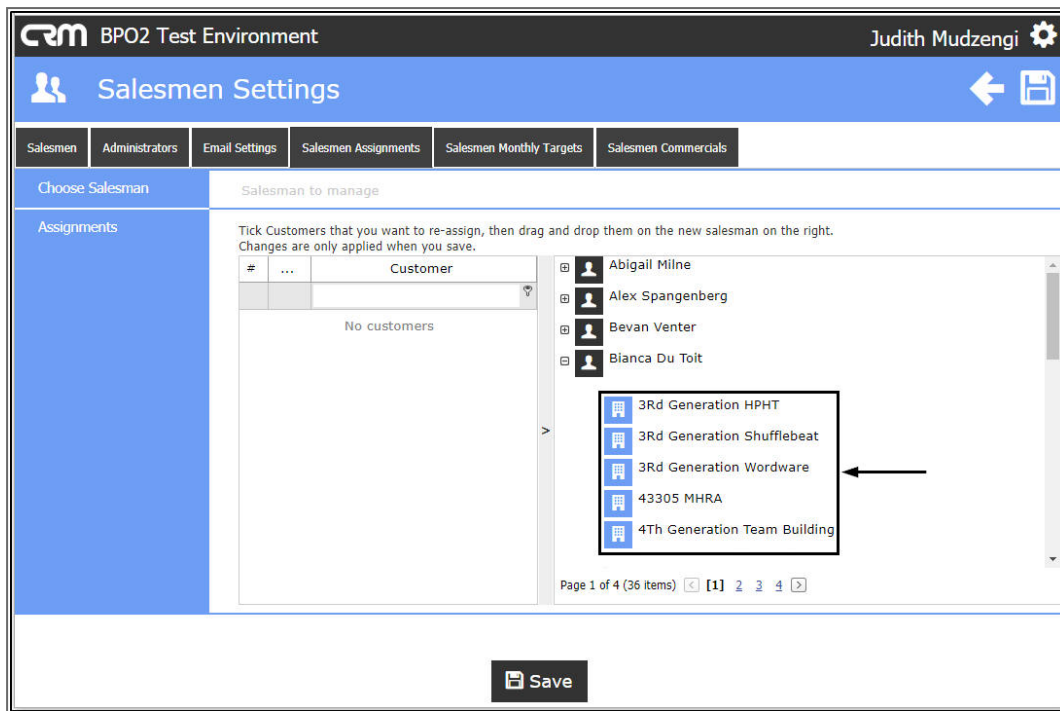
1





Save

- A list of customers linked to the salesman will be displayed (i.e. where the salesman is either the 'main salesman' or 'additional salesman').



CRM BPO2 Test Environment Judith Mudzengi

Salesmen Settings

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials

Choose Salesman Salesman to manage

Assignments

Tick Customers that you want to re-assign, then drag and drop them on the new salesman on the right.
Changes are only applied when you save.

#	...	Customer
		No customers

Abigail Milne
Alex Spangenberg
Bevan Venter
Blanca Du Toit

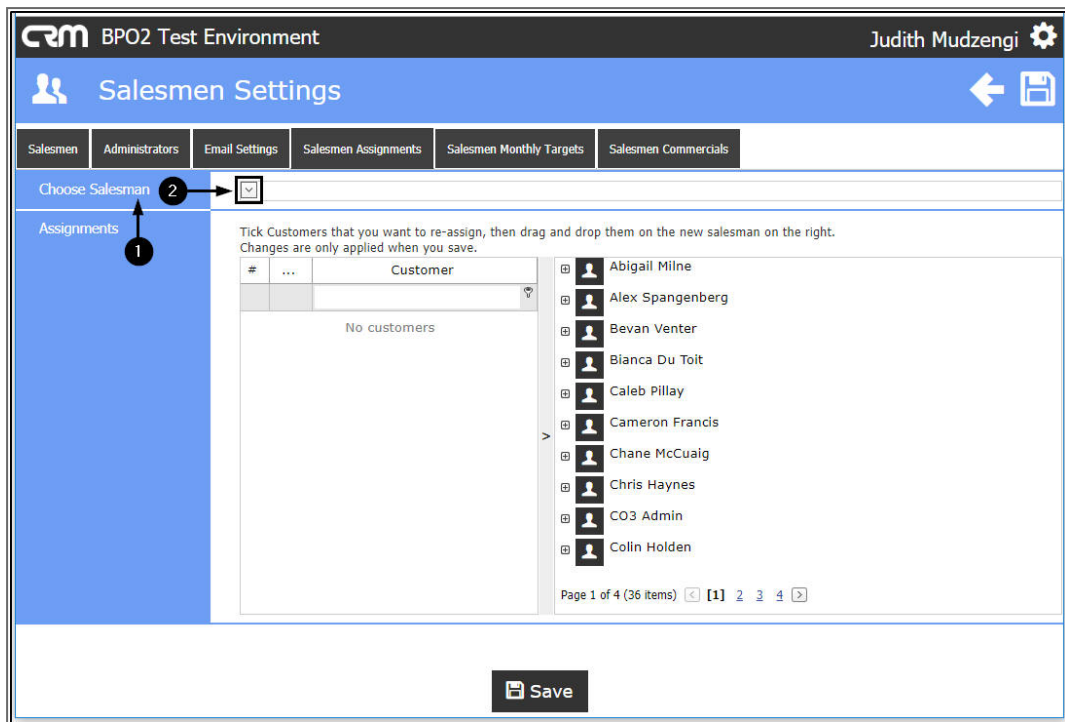
3Rd Generation HPHT
3Rd Generation Shufflebeat
3Rd Generation Wordware
43305 MHRA
4Th Generation Team Building

Page 1 of 4 (36 items) [1] 2 3 4

Save

REASSIGN CUSTOMER TO ANOTHER SALESMAN

- If you need to you need to reassign a customer to another salesman, e.g. the salesman has left, or changed selling 'areas'.
 - In the **Choose Salesman** field,
 - click on the **down arrow** that pops up when you hover over the **Choose Salesman text box**.



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Salesmen Settings

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials

Choose Salesman 2

Assignments 1

Tick Customers that you want to re-assign, then drag and drop them on the new salesman on the right.
Changes are only applied when you save.

#	...	Customer
		No customers

- Abigail Milne
- Alex Spangenberg
- Bevan Venter
- Bianca Du Toit
- Caleb Pillay
- Cameron Francis
- Chane McCuaig
- Chris Haynes
- CO3 Admin
- Colin Holden

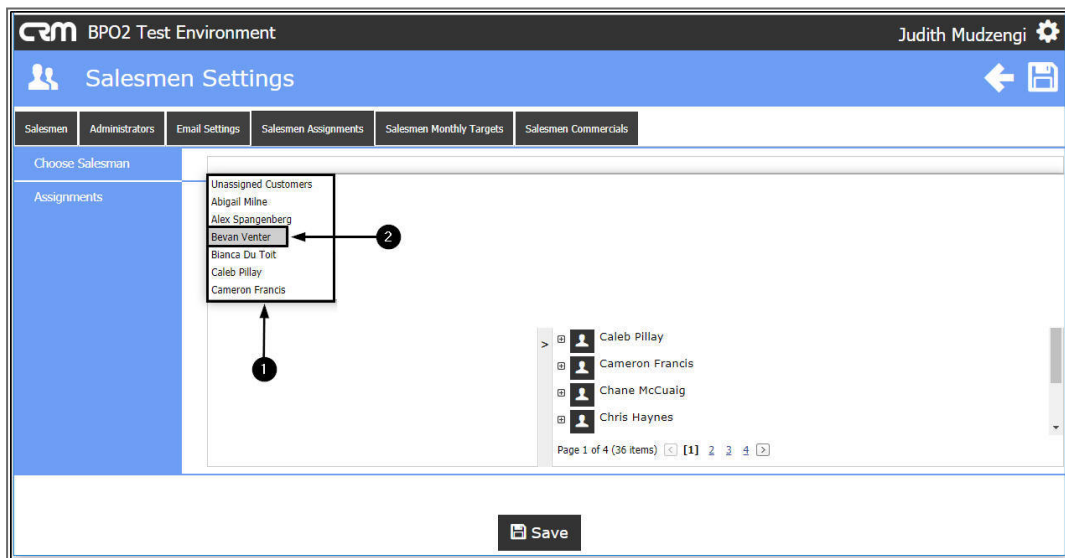
Page 1 of 4 (36 items) 1 2 3 4

Save

1. A **Salesmen drop-down menu** will be displayed.

2. Select the relevant salesman.

- In this image, **Bevan Venter** has been selected.



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Salesmen Settings

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials

Choose Salesman

Assignments

Unassigned Customers

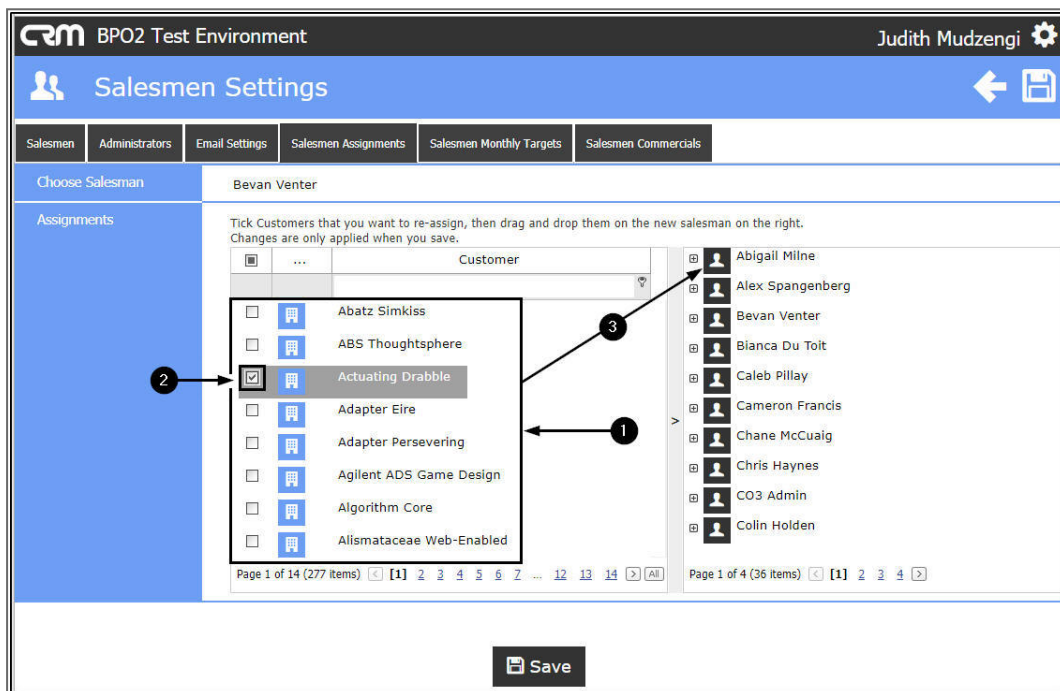
- Abigail Milne
- Alex Spangenberg
- Bevan Venter
- Bianca Du Toit
- Caleb Pillay
- Cameron Francis

- Caleb Pillay
- Cameron Francis
- Chane McCuaig
- Chris Haynes

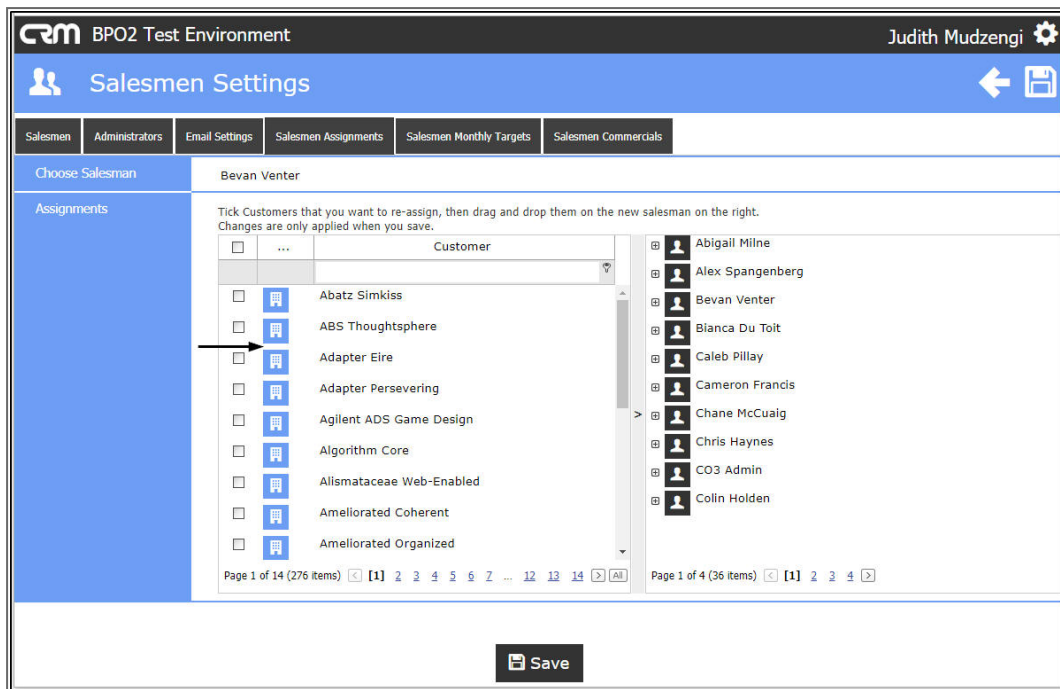
Page 1 of 4 (36 items) 1 2 3 4

Save

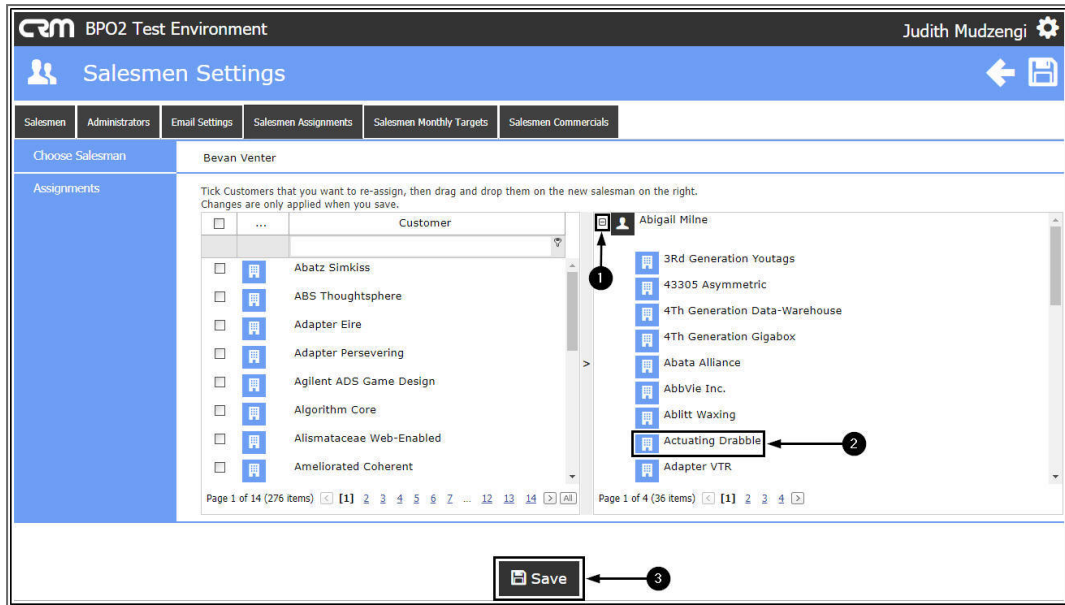
1. A list of customers will come up, where this salesman is the default salesman.
2. Select the customer(s) that need to be re-assigned, by ticking the **check box(es)**.
3. Drag and drop the customer(s) to the relevant Salesman. When re-assigning a customer, all related cases, reminders and recommendations for the salesman are reassigned to the new salesman.
 - In this image, customer **Actuating Drabble** is being re-assigned from **Bevan Venter** to **Abigail Milne**.



- The customer will no longer be displayed in the customers list of the previous salesman.
 - In this image, **Actuating Drabble** is no longer displayed in **Bevan Venter**'s customer list.



1. Click on the **Expand** button to view the current salesman's customers list.
2. The customer will now be displayed in the current salesman's customer list.
 - In this image, customer **Actuating Drabble** is now displayed in **Abigail Milne's** customer list.
3. Click on **Save**.
 - **Note:** Remember to maximise the screen if you do not see the **Save** button.



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Salesmen Settings

Salesmen Administrators Email Settings Salesmen Assignments Salesmen Monthly Targets Salesmen Commercials

Choose Salesman Bevan Venter

Assignments

Tick Customers that you want to re-assign, then drag and drop them on the new salesman on the right. Changes are only applied when you save.

Customer

Abatz Simkiss

ABS Thoughtsphere

Adapter Eire

Adapter Persevering

Agilent ADS Game Design

Algorithm Core

Allismataceae Web-Enabled

Ameliorated Coherent

Abigail Milne

3Rd Generation Youtags

43305 Asymmetric

4Th Generation Data-Warehouse

4Th Generation Gigabox

Abata Alliance

Abbvie Inc.

Ablitt Waxing

Actuating Drabble

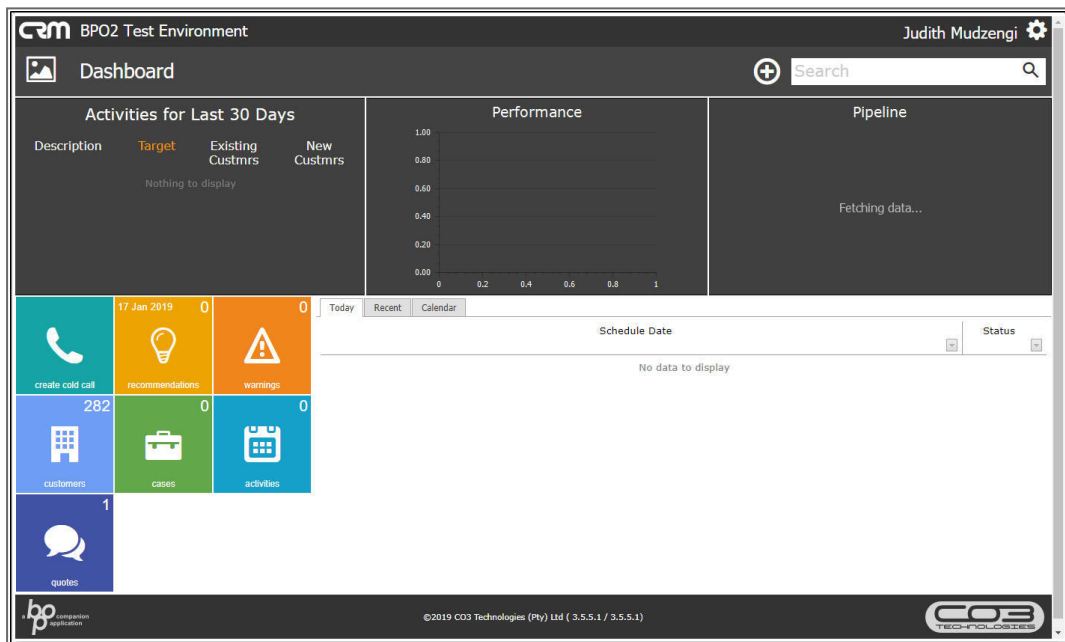
Adapter VTR

Page 1 of 14 (276 items)

Page 1 of 4 (36 items)

Save

- You will return to the *Dashboard*.



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Dashboard

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

recommendations

warnings

customers

cases

activities

quotes

bp

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