

Configuration Options - Salesperson For Agreement Renewal Reviews

Setting Salesperson for Agreement Renewal Reviews

1. Navigate to **Tools > Configuration**.
2. In the search box, type '**Salesperson for Agreement Renewal Reviews**'.
3. Tick the **Search All** checkbox.
4. Click **Search**.
5. Set the required salesperson globally.
 - If not set, the review will default to the salesperson of the Agreement.
 - This option is used when an automatic review fails to send an email to the customer due to a missing email address or an error in sending.

Created 2025-03-10 12:06:58 UTC by Jasmine Richardson
Updated 2025-03-10 15:57:44 UTC by Jasmine Richardson