

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

CRM SETTINGS

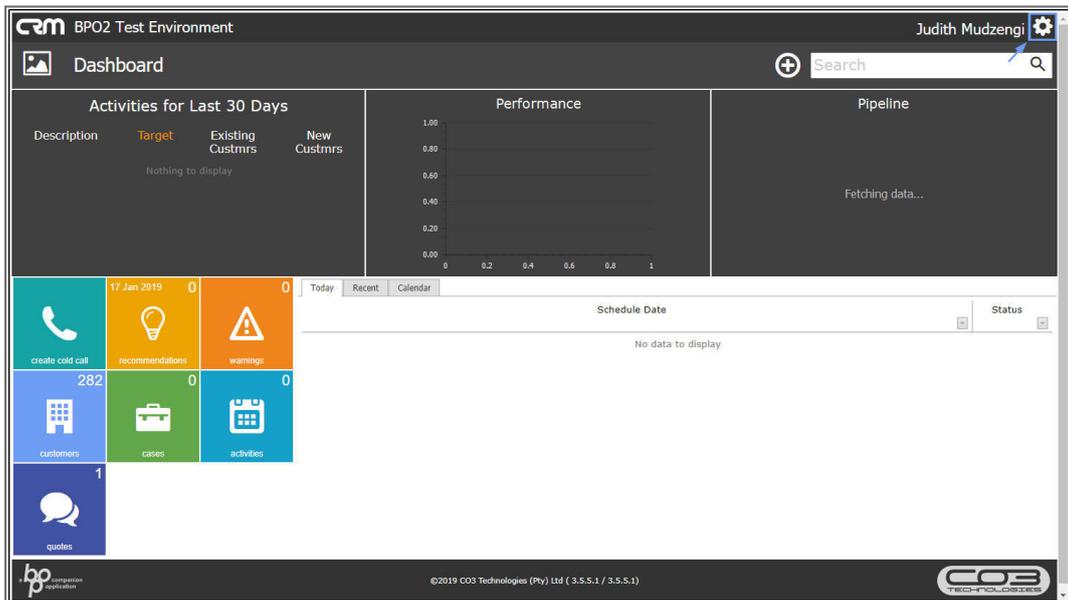
COMPANY DEFAULT EMAIL SETTINGS

When a salesman is sending an email where he has not configured his own **salesman signature**, this default email signature will be used for the email.

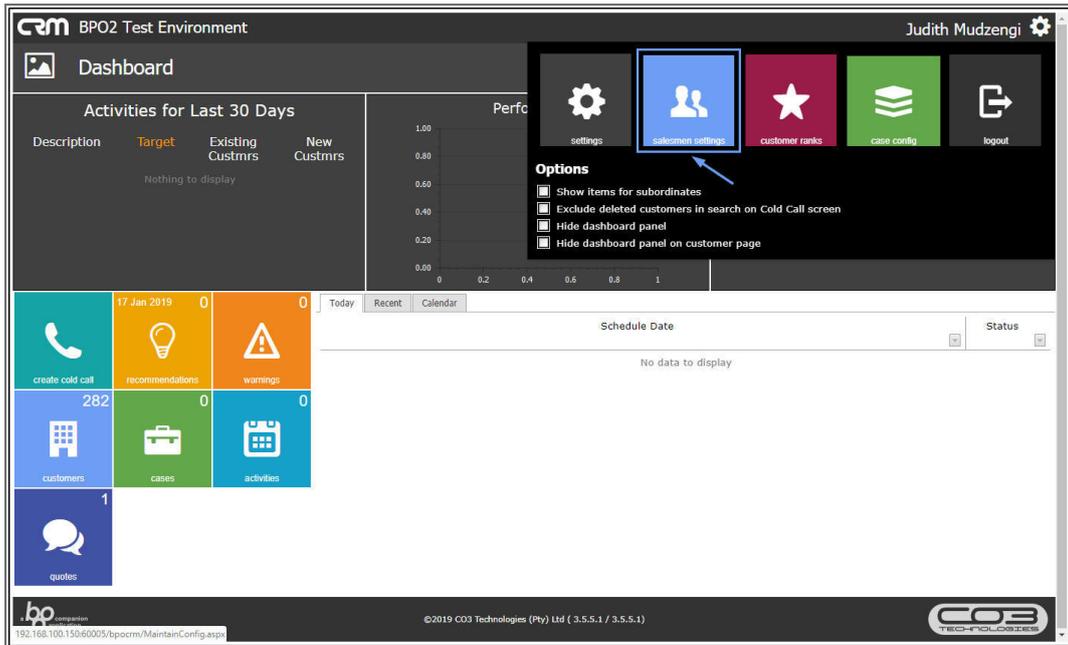
Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

SALESMEN SETTINGS / EMAIL SETTINGS

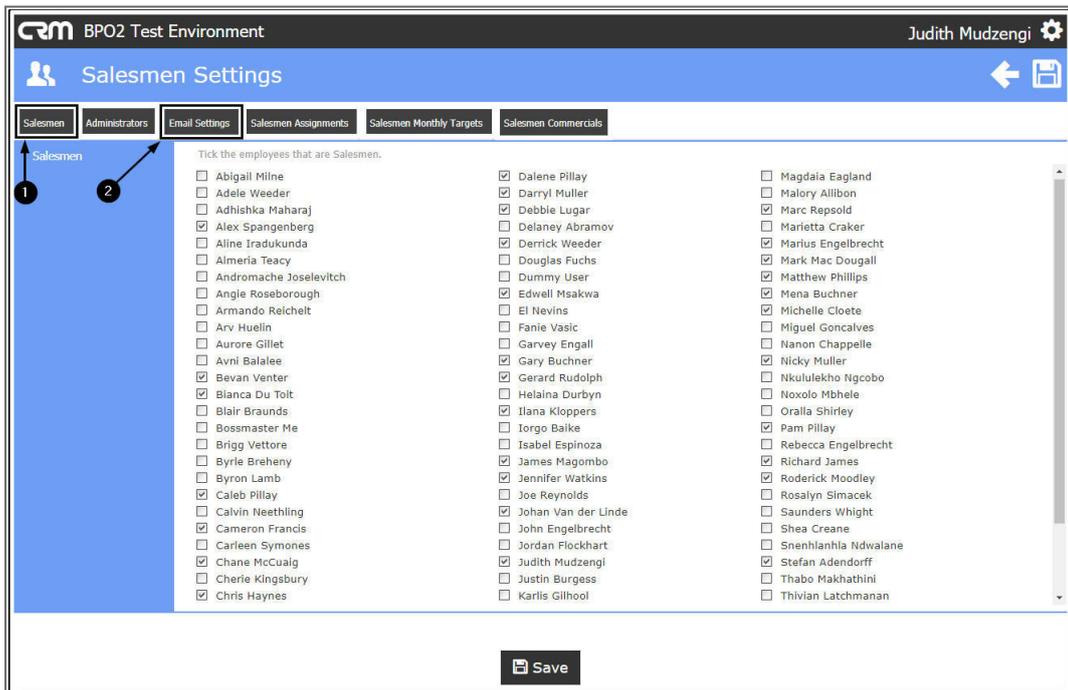
- Click on the **Settings** button to the right of your **UserName**.



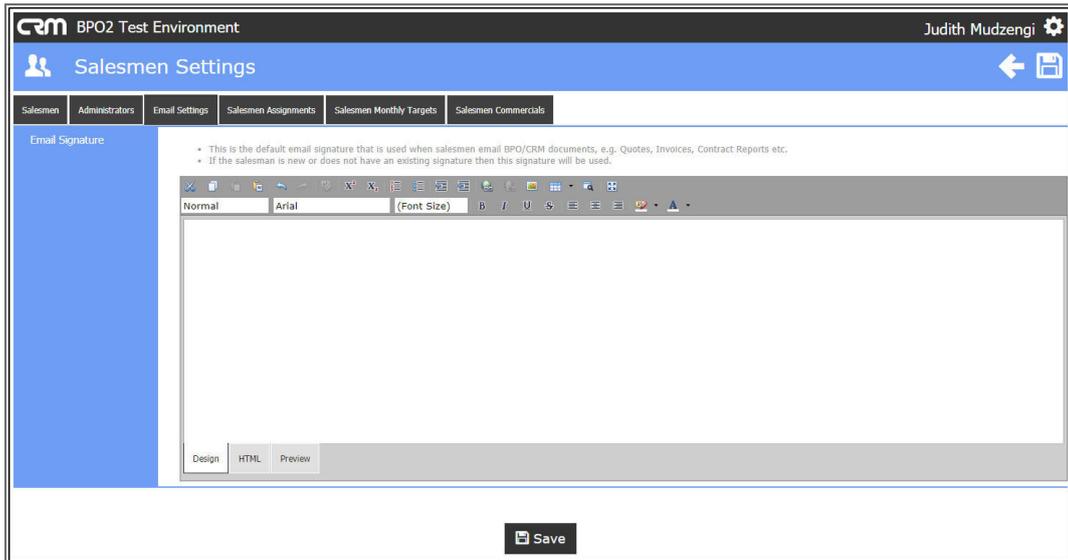
- The session **Options** page will pop up.
- Click on the **Salesmen Settings** tile.



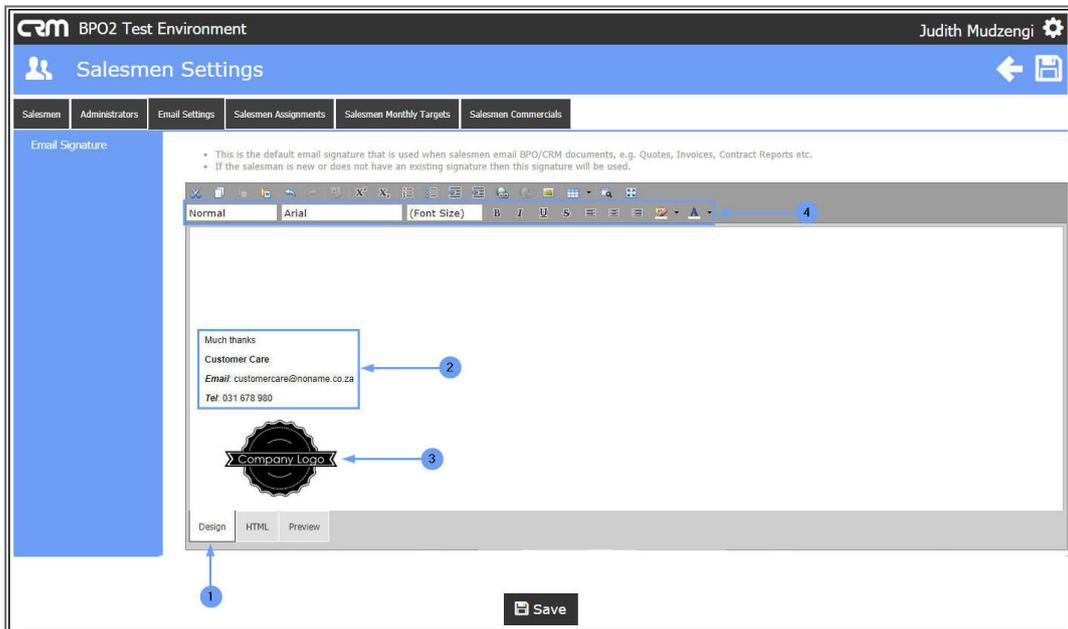
1. The **Salesmen** tab is selected by default.
2. Click on the **Email Settings** tab to edit the default email signature.



- The **Email Signature** section will be displayed.

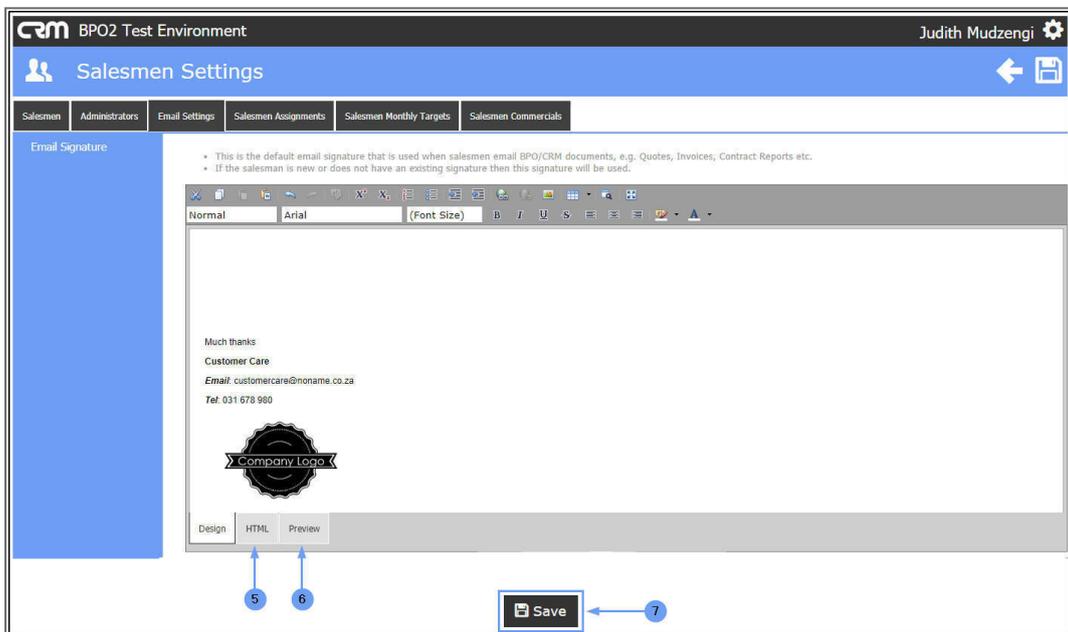


1. Within the **Design** tab,
2. type in the default signature and or
3. paste an image as the default signature. You can resize the image if required.
4. You can use the **tool bar** to customize the default signature.



5. Click on the **../../Service/LatestRelease/L** tab if you wish to customize the default signature in **../../Service/LatestRelease/L**.
6. Click on the **Preview** tab if you wish to preview the configured default signature.
7. 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 'BPO2 Test Environment'. The user is identified as 'Judith Mudzengi'. The dashboard includes several key sections:

- Activities for Last 30 Days:** A table with columns for 'Description', 'Target', 'Existing Custmrs', and 'New Custmrs'. It currently shows 'Nothing to display'.
- Performance:** A line chart with a y-axis from 0.00 to 1.00 and an x-axis from 0 to 1. The chart area is empty.
- Pipeline:** A section that is currently displaying 'Fetching data...'.
- Summary Cards:** A grid of six cards: 'create cold call' (0), 'recommendations' (0), 'warnings' (0), 'customers' (282), 'cases' (0), and 'activities' (0). A separate card for 'quotes' shows a count of 1.
- Calendar:** A section for 'Schedule Date' with tabs for 'Today', 'Recent', and 'Calendar'. It currently shows 'No data to display'.

At the bottom of the dashboard, there is a footer with the CO3 logo, the text '©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)', and a small 'bp' logo.

CRM.003.007

