

CRM SETTINGS

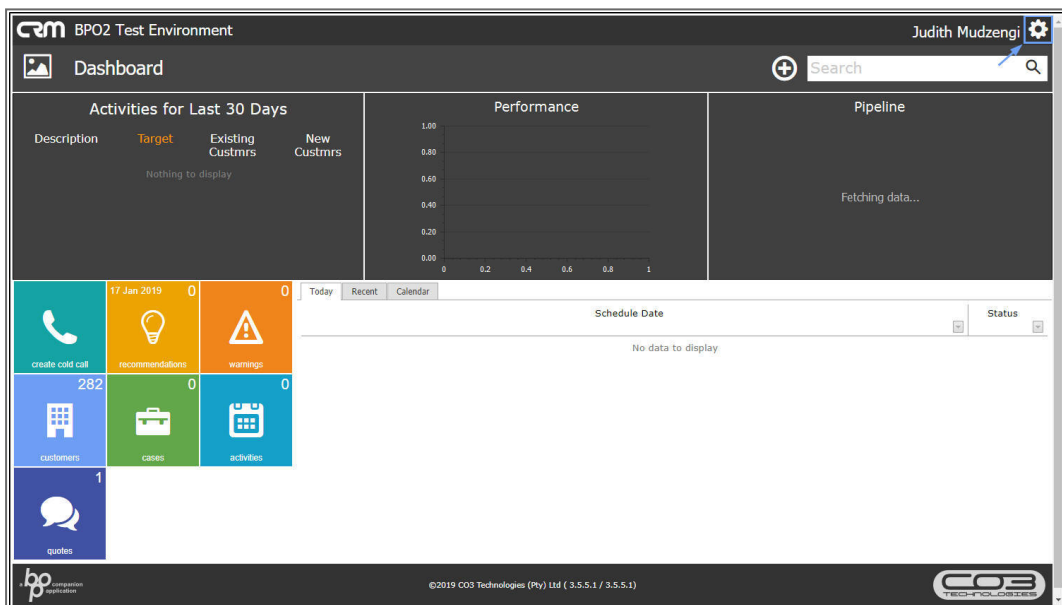
MY SETTINGS / ACCOUNT SETTING

Account Settings gives you the ability to change your **BPO / CRM** Password.

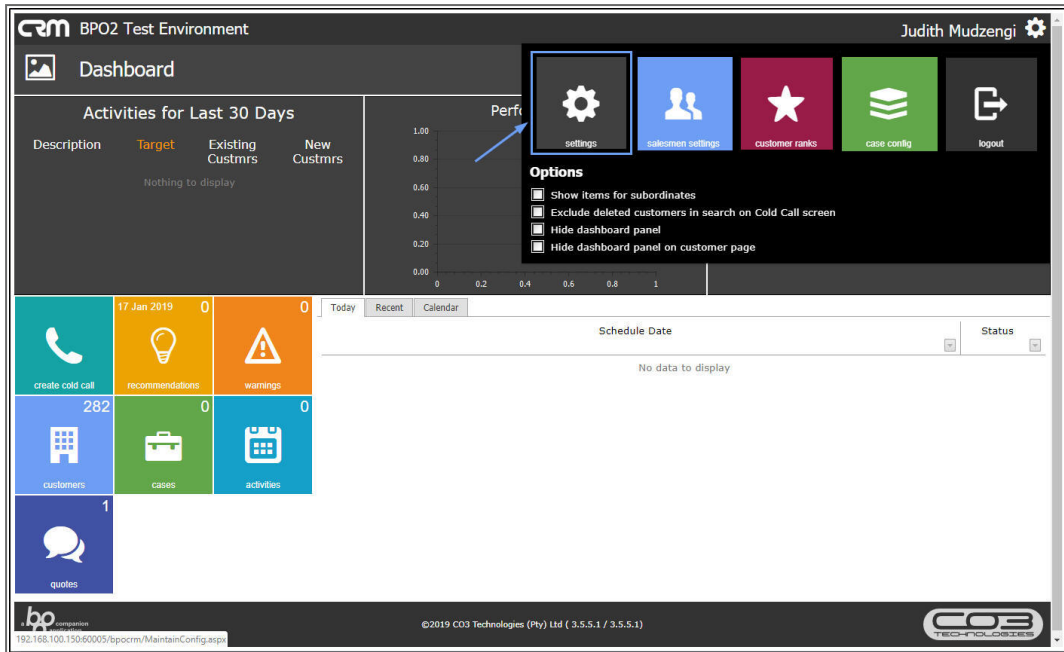
Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

MY SETTINGS – ACCOUNT SETTINGS

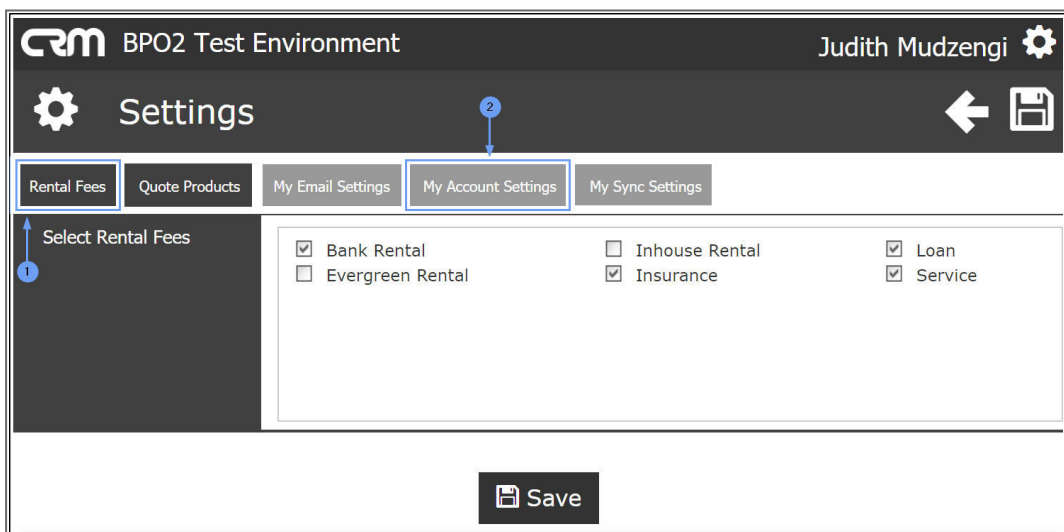
- Click on the **Settings** button to the right of your **UserName**.



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



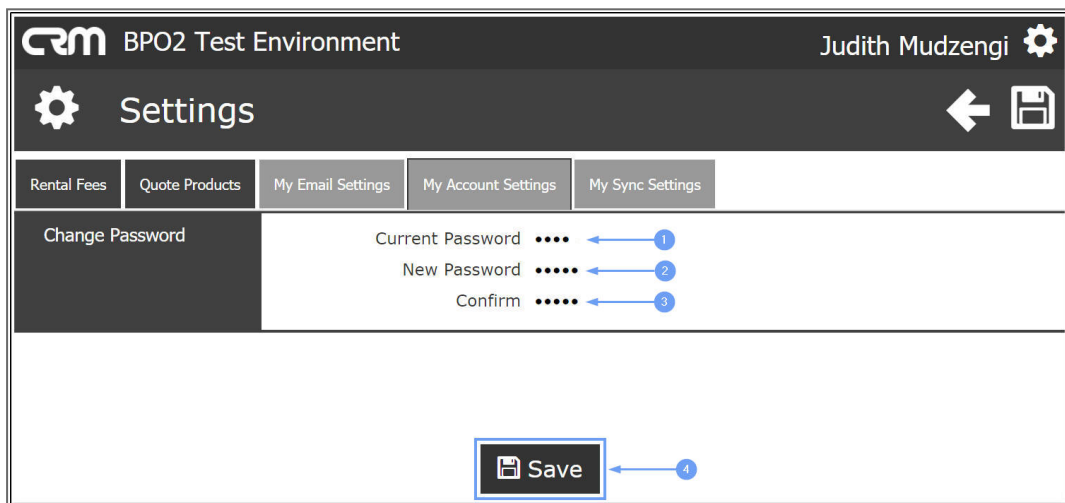
- The **Settings** screen will be displayed.
 1. The **Rental Fees** tab will be selected by default.
 2. Click on **My Account Settings** tab.



- The **Change Password** details will be displayed.

1. Type in **Current Password**.
2. Type in the **New Password** - and
3. **Confirm**, by typing the new password in again.
4. Click on **Save**.

- **Note 1:** If you don't see the **Save** button - make sure your **Settings** screen is maximised.
- **Note 2:** 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' user named Judith Mudzengi. The dashboard is divided into several sections:

- Header:** 'CRM BPO2 Test Environment' on the left and 'Judith Mudzengi' with a settings gear icon on the right. A search bar is also present.
- Activities for Last 30 Days:** A table with columns for 'Description', 'Target', 'Existing Custms', and 'New Custms'. 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 currently empty.
- Pipeline:** A section that says 'Fetching data...'
- Summary Tiles:** A grid of six tiles: 'create cold call' (0), 'recommendations' (17 Jan 2019, 0), 'warnings' (0), 'customers' (282), 'cases' (0), and 'activities' (0). A 'quotes' tile with '1' is partially visible below.
- Calendar:** A 'Schedule Date' section with tabs for 'Today', 'Recent', and 'Calendar'. It shows 'No data to display'.
- Footer:** 'bp comparison application' logo on the left, '©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)' in the center, and the 'CO3 TECHNOLOGIES' logo on the right.

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