

CRM SETTINGS

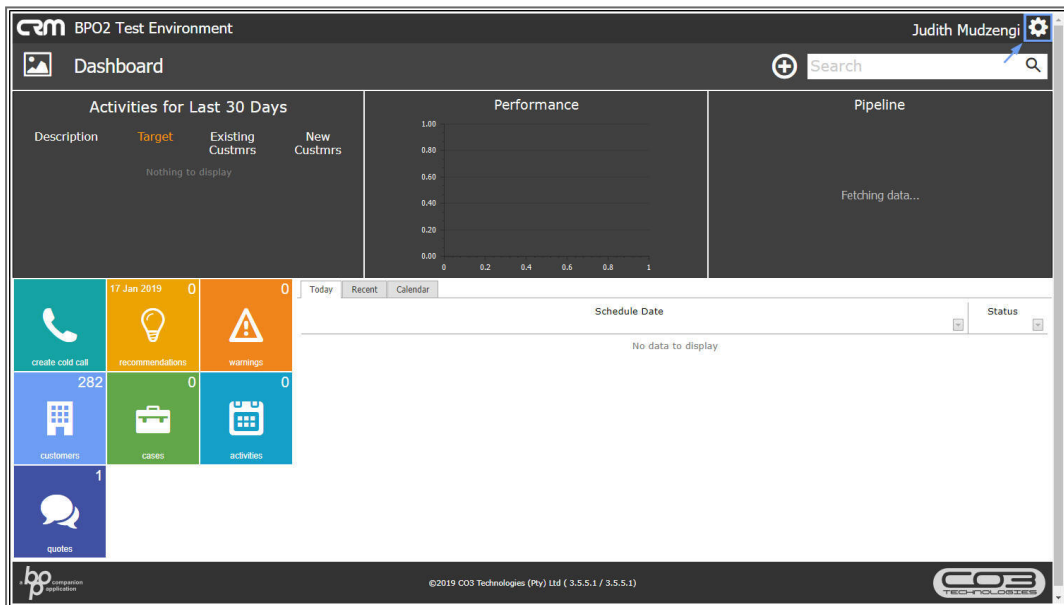
MY SETTINGS / EMAIL SIGNATURE

Your Signature will be used for emailing Sales documents. If you don't have an email configured, then the company **default CRM signature** is used.

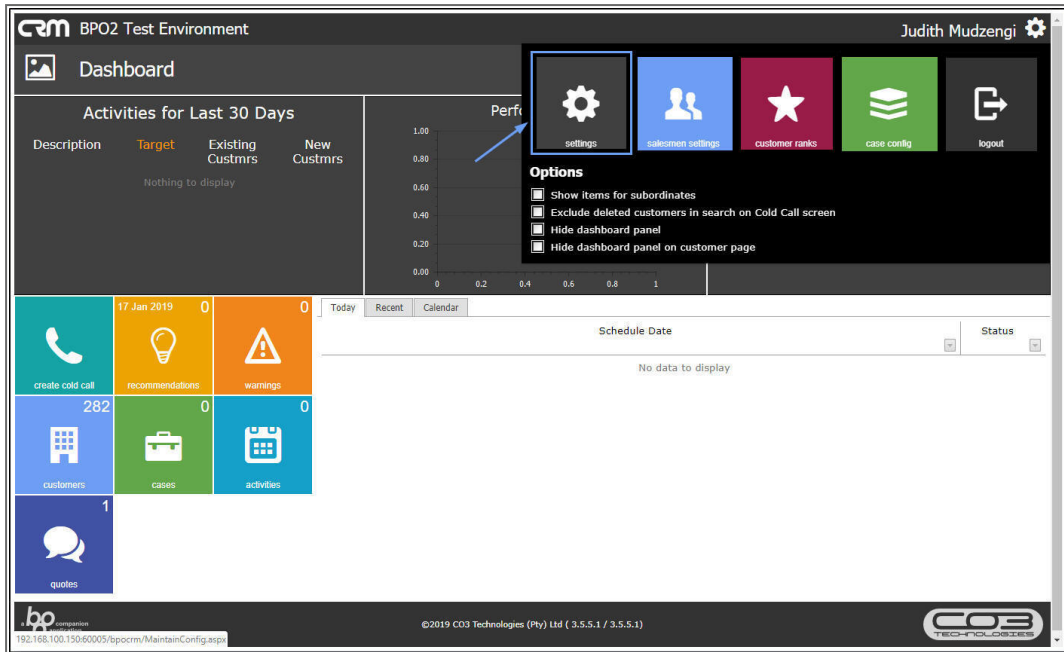
Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

SETTINGS – MY EMAIL SETTINGS

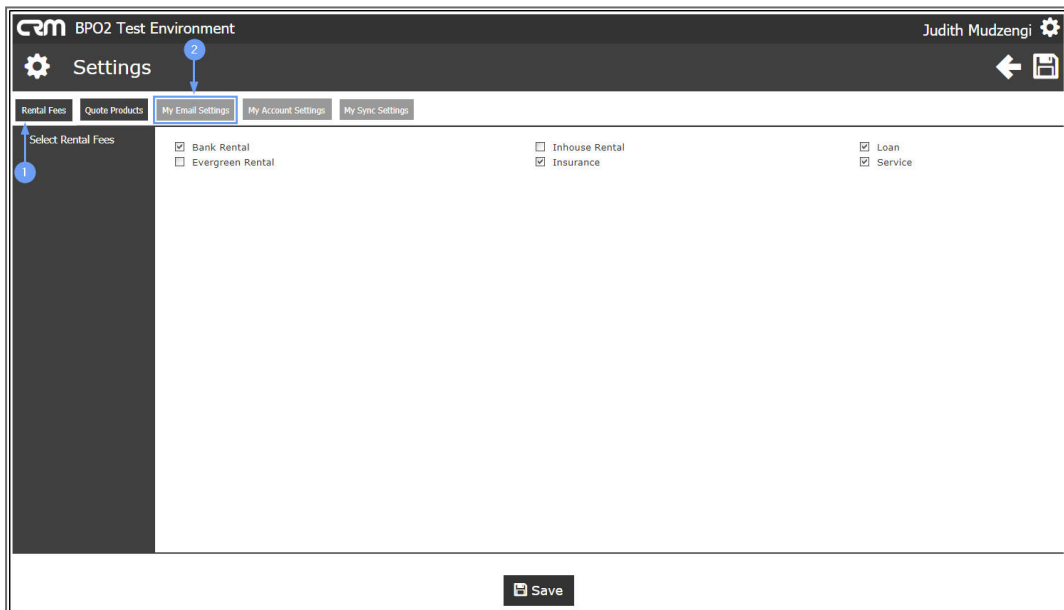
- Click on the **Settings** button to the right of your **UserName**.



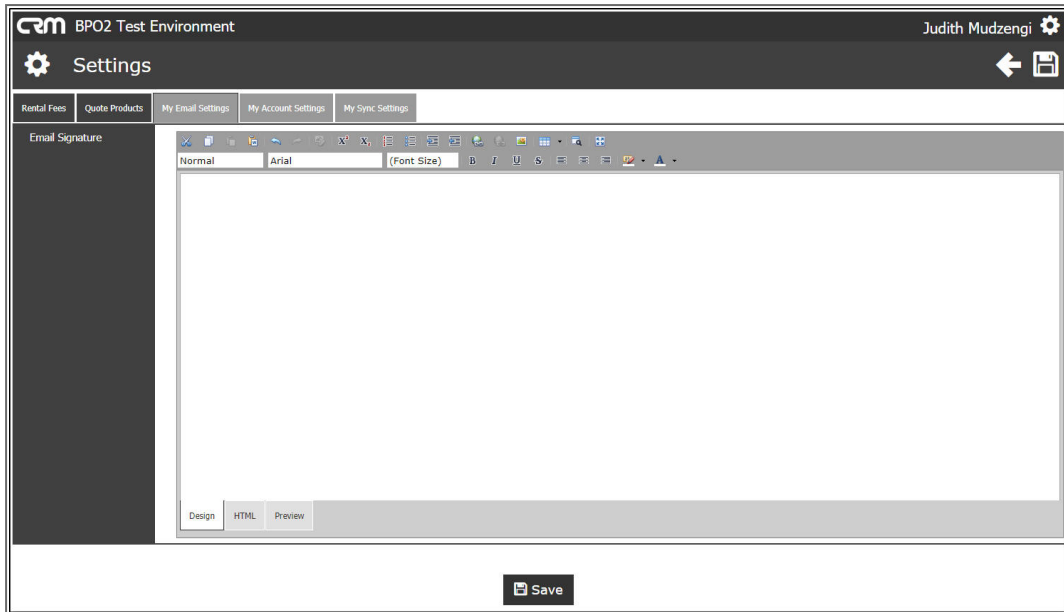
- The session **Options** page will pop up.
- Click on the **Settings** tile.



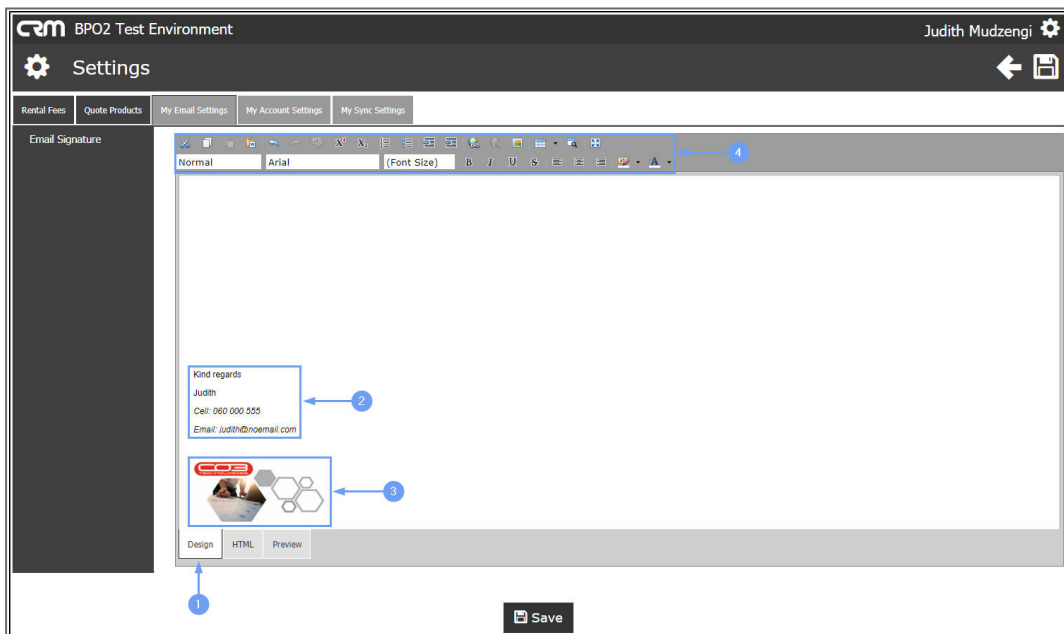
1. The **Rental Fees** tab is selected by default.
2. Click on **My Email Settings** tab. This will enable you to set up your own email signature that will be used instead of the default signature.



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

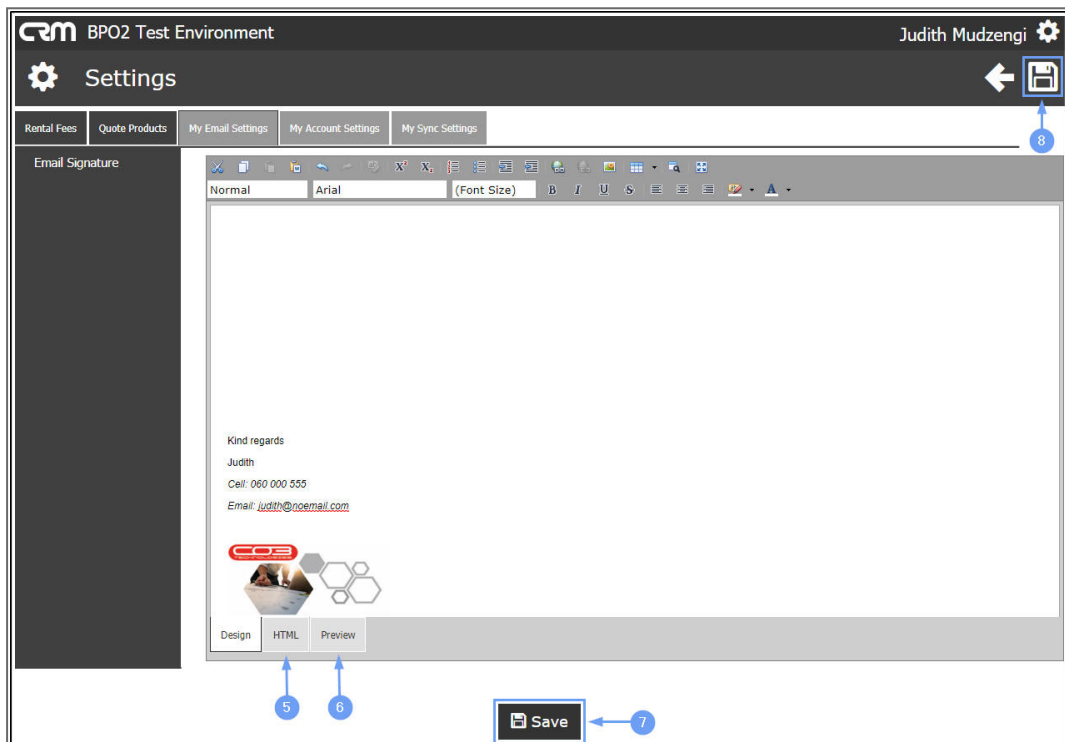


1. Within the **Design** tab,
2. type in the default signature and or
3. paste an image as the default signature. You can resize the image if required.
4. You can use the **tool bar** to customize the default signature.



5. Click on the **HTML** tab if you wish to customize the default signature in **HTML**.
6. Click on the **Preview** tab if you wish to preview the configured default signature.
7. Click on the **Save** button or
8. **Save** icon.

- **Note:** Remember to maximise your screen if you do not see the **Save** button.



- 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 a search bar, a 'Performance' chart, and a 'Pipeline' section. A table titled 'Activities for Last 30 Days' is currently empty. A sidebar contains several widgets: 'create cold call', 'recommendations', 'warnings', 'customers' (282), 'cases', 'activities', and 'quotes' (1). The footer contains the CO3 Technologies logo and version information: '©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)'.

CRM.003.006

