

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]:[portno]/BPOCRM/User.aspx

SETTINGS - MY EMAIL SETTINGS

- CCM BPO2 Test Environment Judith Mudzengi 🍄 Dashboard 🕀 Sea Q Performance Pipeline Activities for Last 30 Days Description New ay Recent Calendar Status Schedule Date \bigcirc A ¥ No data to display Π ÷
- Click on the *Settings* button to the right of your *UserName*.

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



CCM BPO2 Test Environment	Judith Mudzengi 🌣
Dashboard	
Dashboard Activities for Last 30 Days Description Target Existing New Custmrs Custmrs Nothing to display	Perfr 100 100 100 100 100 100 100 10
17 Jan 2019 0 0 Today	0 0.2 0.4 0.8 1 Recent Calendar Schedule Date Status No data to display
create cold call economicidations workings	
192:168:100.150:60005/bpocrm/MaintainConfig.aspx	62019 C03 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)

- 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.

CCM BPO2 Test E	Invironment		Judith Mudzengi 🌣
🔅 Settings			← 🖺
Rental Fees Quote Products	My Email Settings My Account Settings My Sync Settings		
Select Rental Fees	☑ Bank Rental □ Evergreen Rental	☐ Inhouse Rental ☑ Insurance	☑ Loan ☑ Service
	E	Save	

• The *Email Signature* section will be displayed.



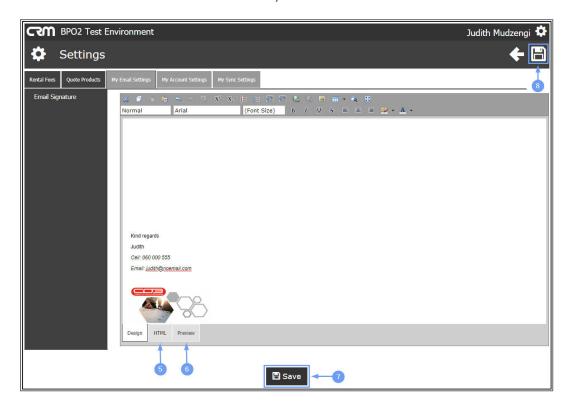
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\$	Settings					+ 🖻
Rental Fees	Quote Products	My Email Settin	igs My Ao	count Settings	My Sync Settings	
Email Sig	nature	Normal		🔊 🦟 🖗	X ² X, [2] Ξ Ξ Ξ Ξ Ξ Δ Δ Δ Δ Ξ Ξ Ξ Ξ Δ + Δ + (Font Size) B I U S Ξ Ξ Ξ Δ + Δ +	
		Design	HTML	Preview		
					E Save	

- 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.

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\$	Settings		🗲 🖹			
Rental Fee	Rental Fees Quote Products My Email Settings My Account Settings My Sync Settings					
Email S	ignature	2 回 10 5 2 2 3 X X, 日日日日 20 4 2 回 冊・40, 田 Normal Arial (Font Size) 8 J U 5 日日日 20・▲・				
		Kind regards Judin Constrained and co				



- 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 <u>maximise</u> your screen if you do not see the *Save* button.



• You will return to the *Dashboard*.



My Settings and Email Signature

CCM BPO2 Test Environment		Judith Mudzengi 🌣 🕯
🖾 Dashboard		Search Q
Activities for Last 30 Days	Performance	Pipeline
Description Target Existing New Custmrs Custmrs	0.80	
Nothing to display	0.60	
	0.40	Fetching data
	0.20	
17 Jan 2019 0 0 Today	0 0.2 0.4 0.6 0.8 1 Recent Calendar	
	Schedule Date	Status
create cold call recommendations warnings	No data to di	
282 0 0		
customers cases activities		
quotes		
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CRM.003.006