

CRM SETTINGS

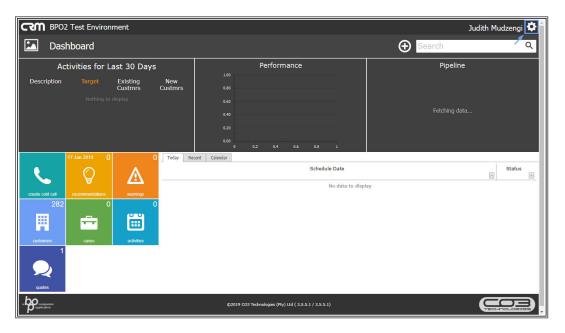
COMPANY DEFAULT EMAIL SETTINGS

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

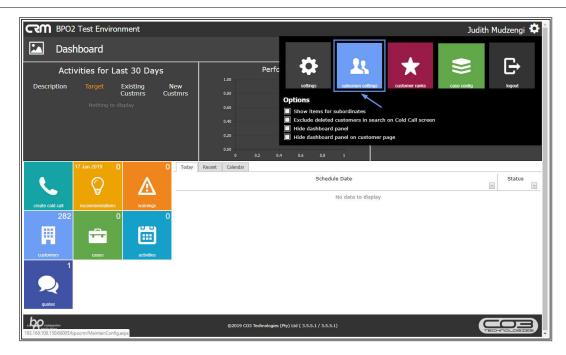
SALESMEN SETTINGS / EMAIL SETTINGS

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



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



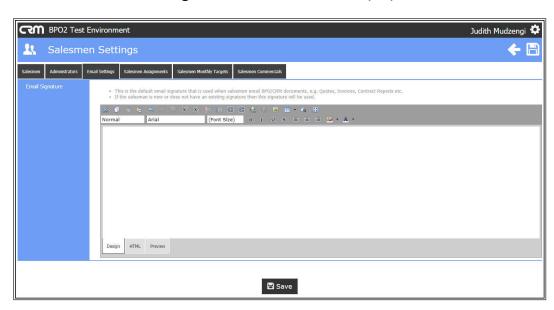


- 1. The *Salesmen* tab is selected by default.
- 2. Click on the *Email Settings* tab to edit the default email signature.

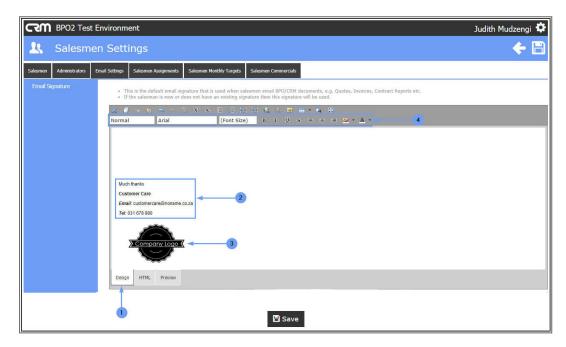




• The *Email Signature* section will be displayed.

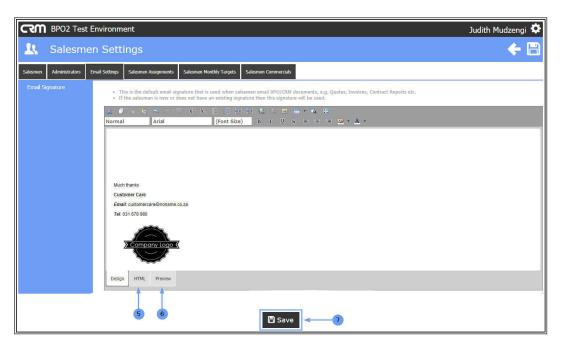


- 1. Within the *Design* tab,
- 2. type in the default signature and or
- 3. paste an image as the default signature. You can resize the image if required.
- 4. You can use the *tool bar* to customize the default signature.



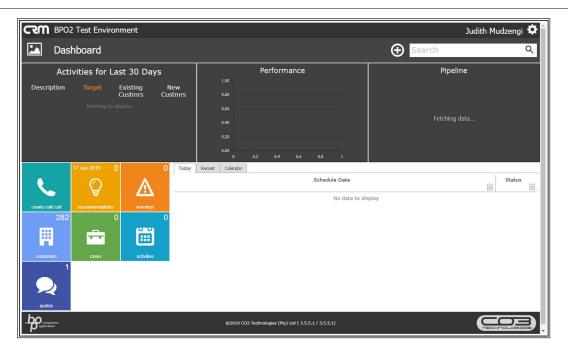


- 5. Click on the *HTML* tab if you wish to customize the default signature in *HTML*.
- 6. Click on the **Preview** tab if you wish to preview the configured default signature.
- 7. Click on Save.
- Note 1: Remember to <u>maximise</u> your screen if you do not see the Save button.
- Note 2: Remember you can also use the Save icon at the top right of your screen to save changes.



• You will return to the *Dashboard*.





CRM.003.007