

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

CRM SETTINGS

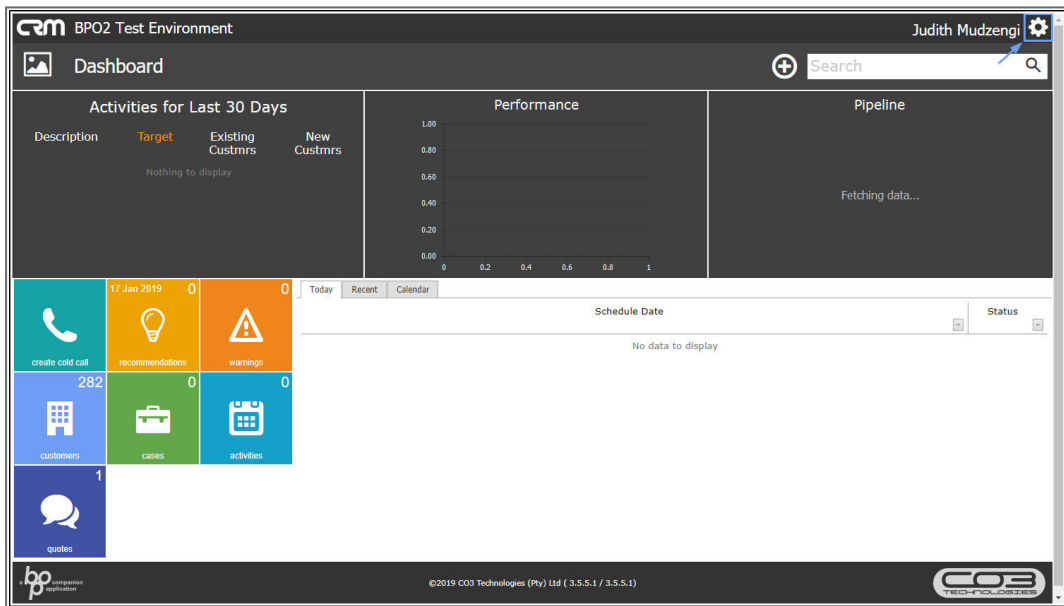
MY SETTINGS / ACCOUNT SETTING

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

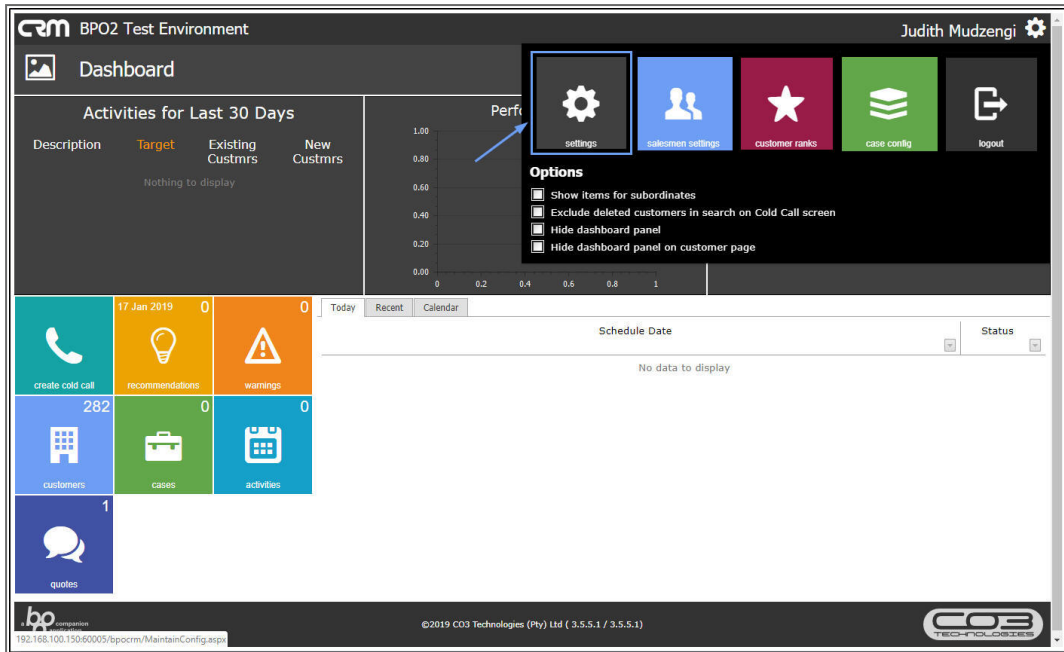
Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

MY SETTINGS – ACCOUNT SETTINGS

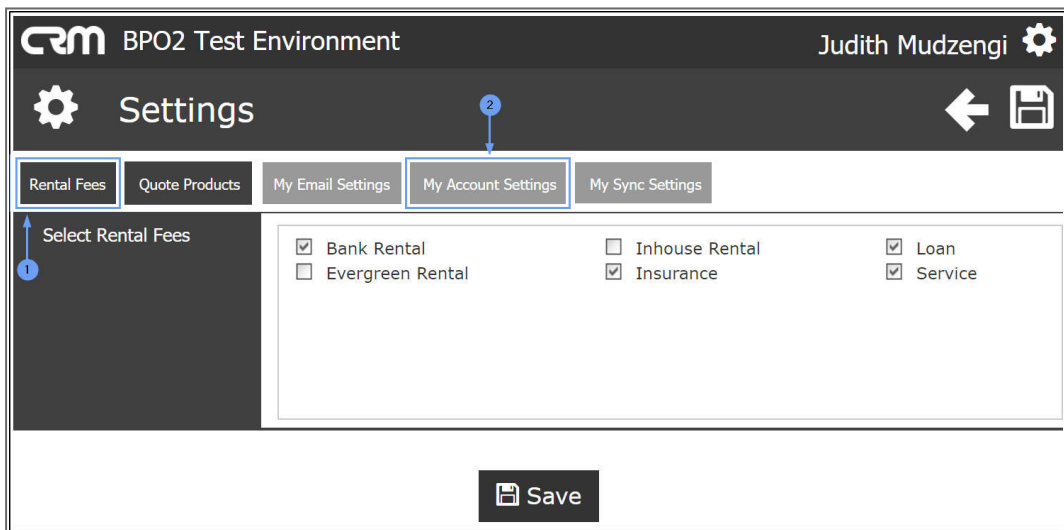
- Click on the **Settings** button to the right of your **UserName**.



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



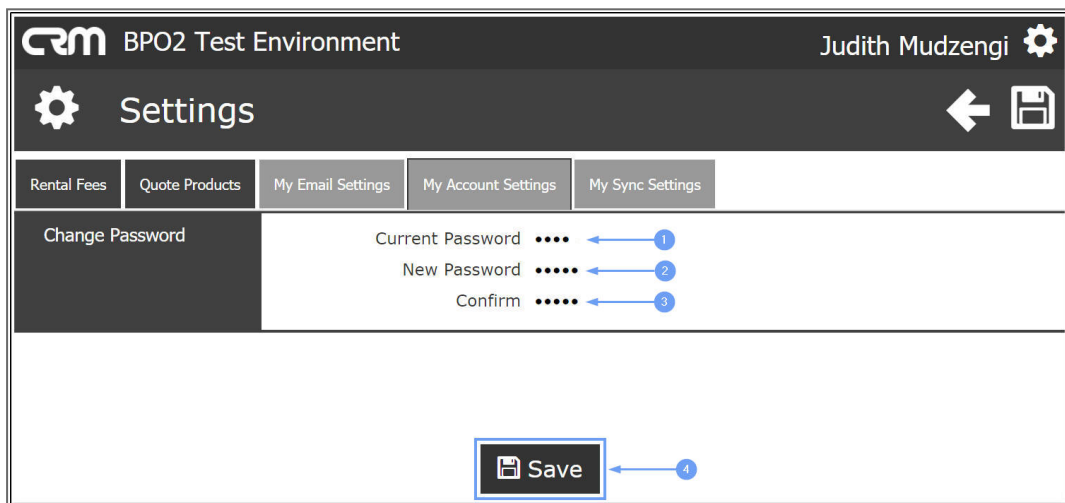
- The **Settings** screen will be displayed.
 1. The **Rental Fees** tab will be selected by default.
 2. Click on **My Account Settings** tab.



- 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 includes a search bar, a table for 'Activities for Last 30 Days' (with columns for Description, Target, Existing Custms, and New Custms), a 'Performance' line chart, and a 'Pipeline' section. A central 'Schedule Date' section is currently empty. A sidebar on the left contains quick links for 'create cold call', 'recommendations', 'warnings', 'customers' (282), 'cases', 'activities', and 'quotes' (1). The footer contains the CO3 logo and copyright information: '©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)'.

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