

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

CRM SETTINGS

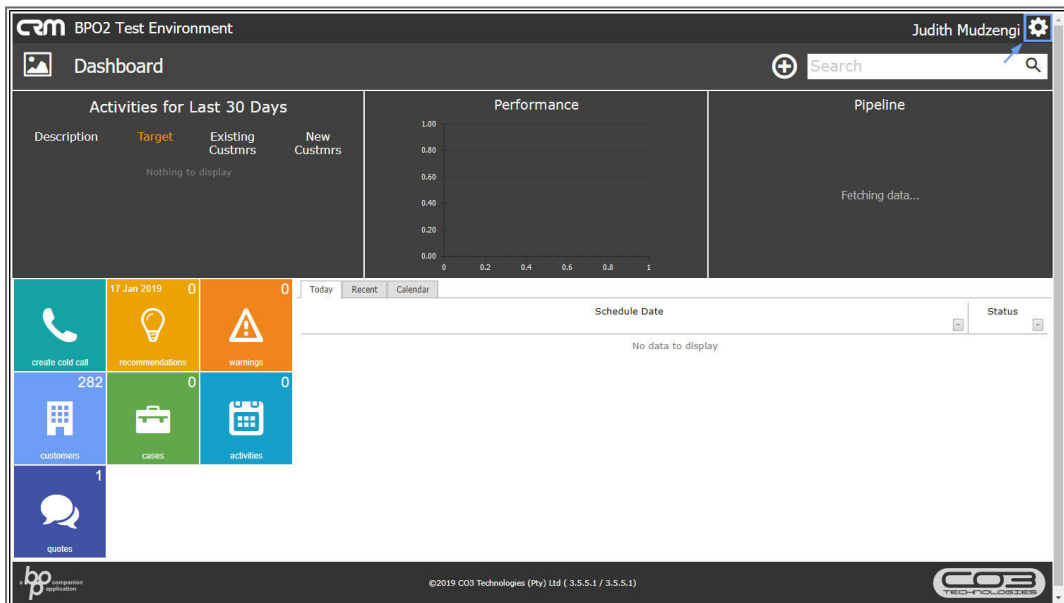
COMPANY DEFAULT EMAIL SETTINGS

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.

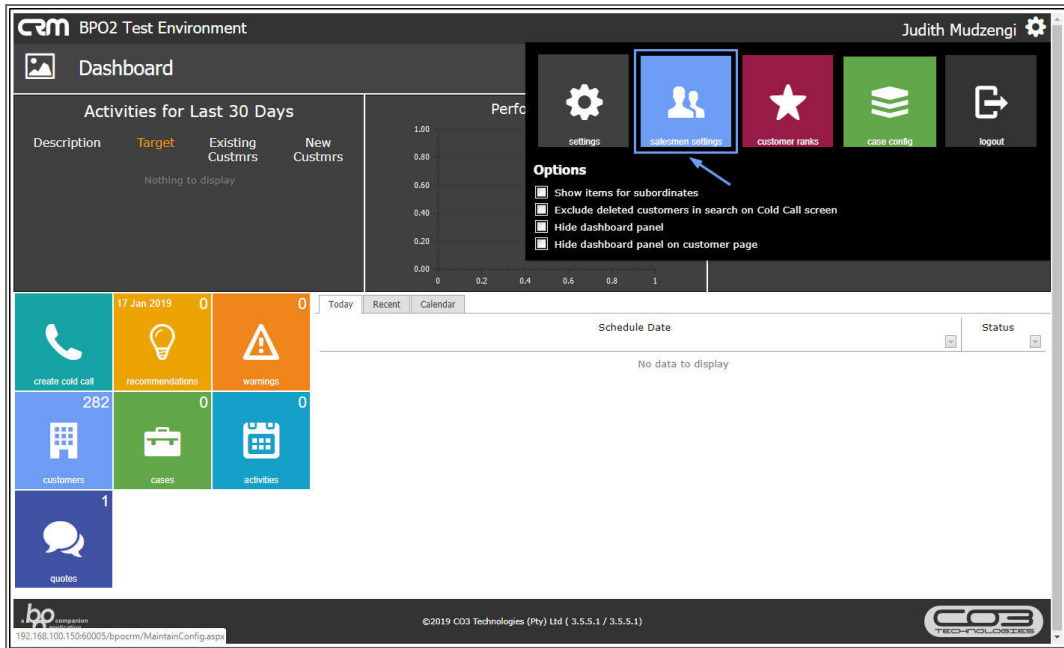
Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

SALESMEN SETTINGS / EMAIL SETTINGS

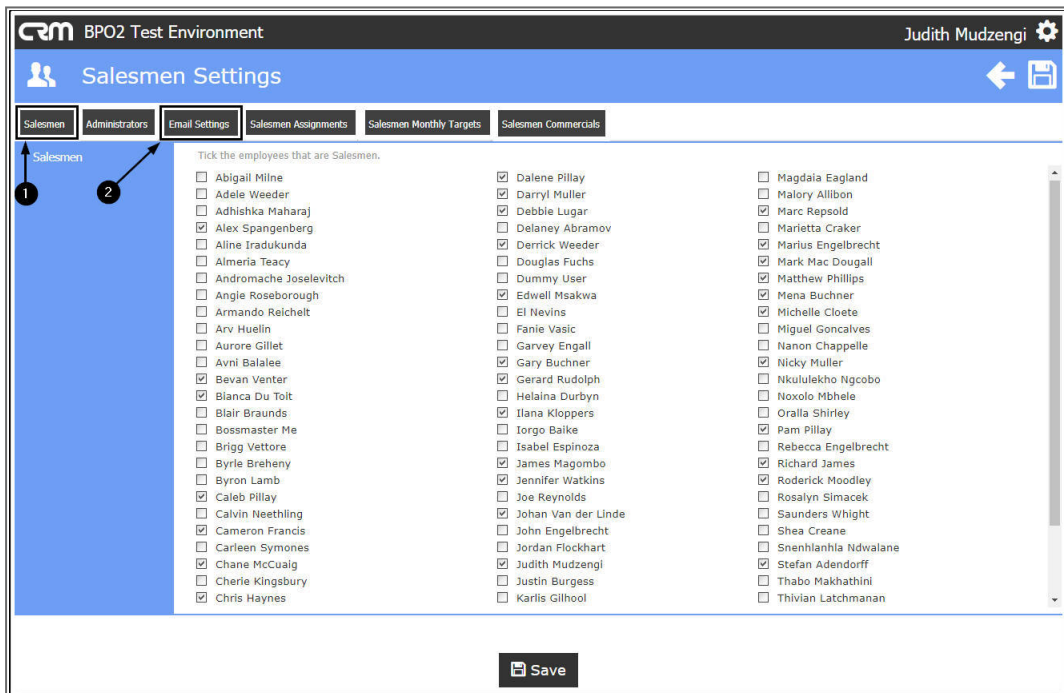
- Click on the **Settings** button to the right of your **UserName**.



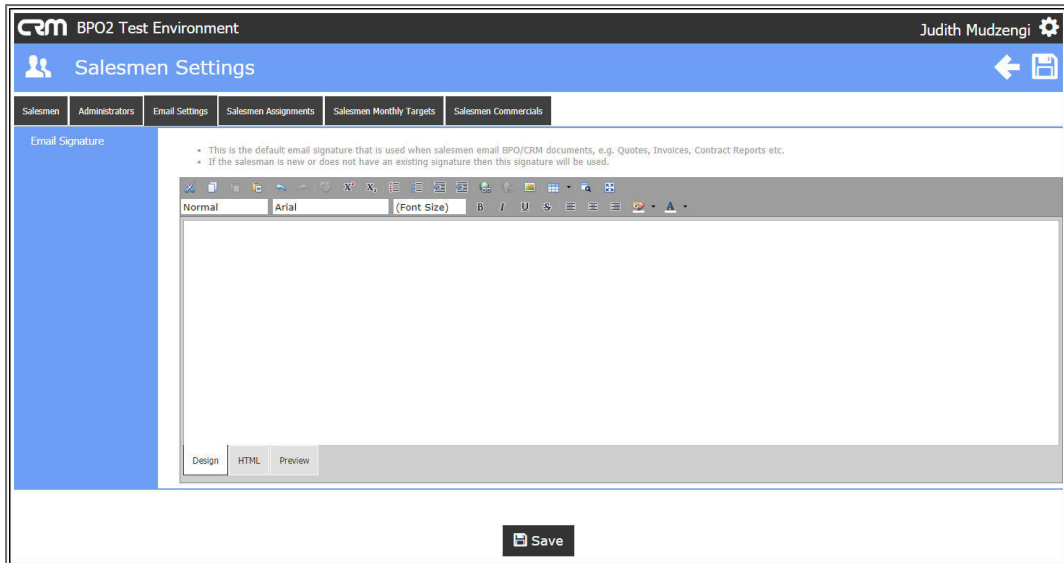
- The session **Options** page will pop up.
- Click on the **Salesmen Settings** tile.



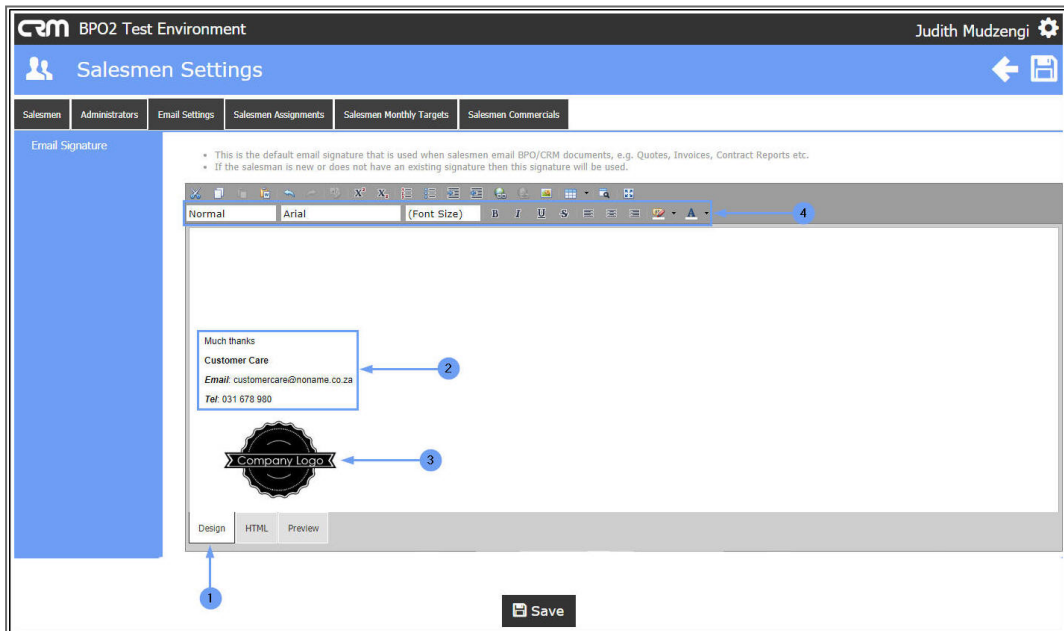
1. The **Salesmen** tab is selected by default.
2. Click on the **Email Settings** tab to edit the default email signature.



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

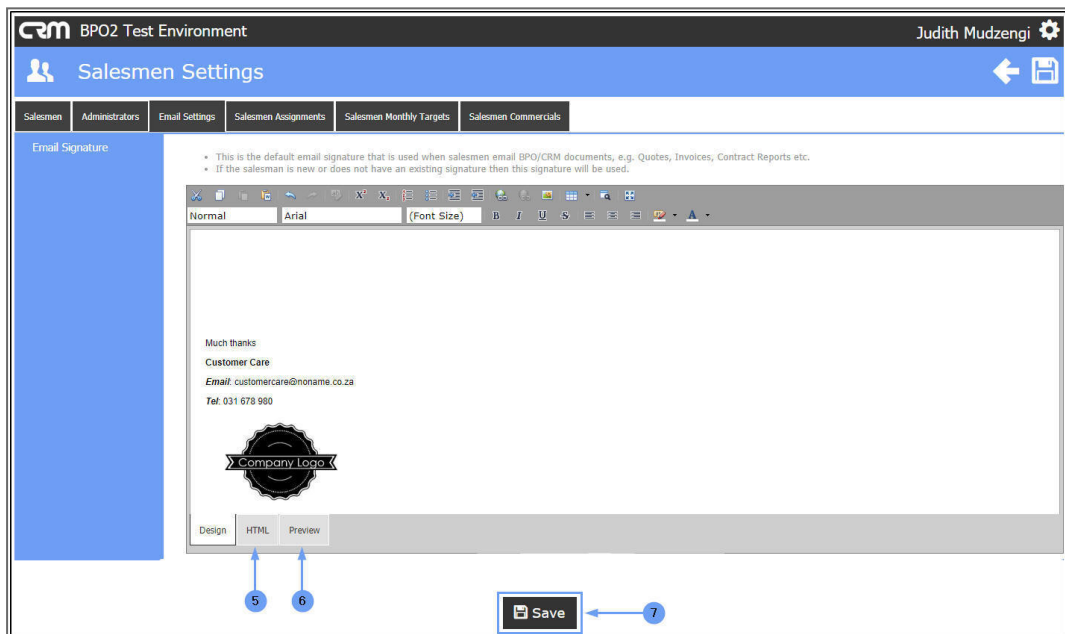


1. Within the **Design** tab,
2. type in the default signature and or
3. paste an image as the default signature. You can resize the image if required.
4. You can use the **tool bar** to customize the default signature.



5. Click on the **../../Service/LatestRelease/L** tab if you wish to customize the default signature in **../../Service/LatestRelease/L**.
6. Click on the **Preview** tab if you wish to preview the configured default signature.
7. Click on **Save**.

- **Note 1:** Remember to maximise 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**.

The screenshot shows a CRM dashboard for a 'BPO2 Test Environment'. The user 'Judith Mudzengi' is logged in. The dashboard includes a search bar, a 'Performance' chart, a 'Pipeline' section with 'Fetching data...' text, and a grid of activity tiles. The activity tiles show counts for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', and 'quotes'. A 'Schedule Date' section is also visible with 'No data to display'.

Activity	Count
create cold call	0
recommendations	0
warnings	0
customers	282
cases	0
activities	0
quotes	1

CRM.003.007

