

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

CRM SETTINGS

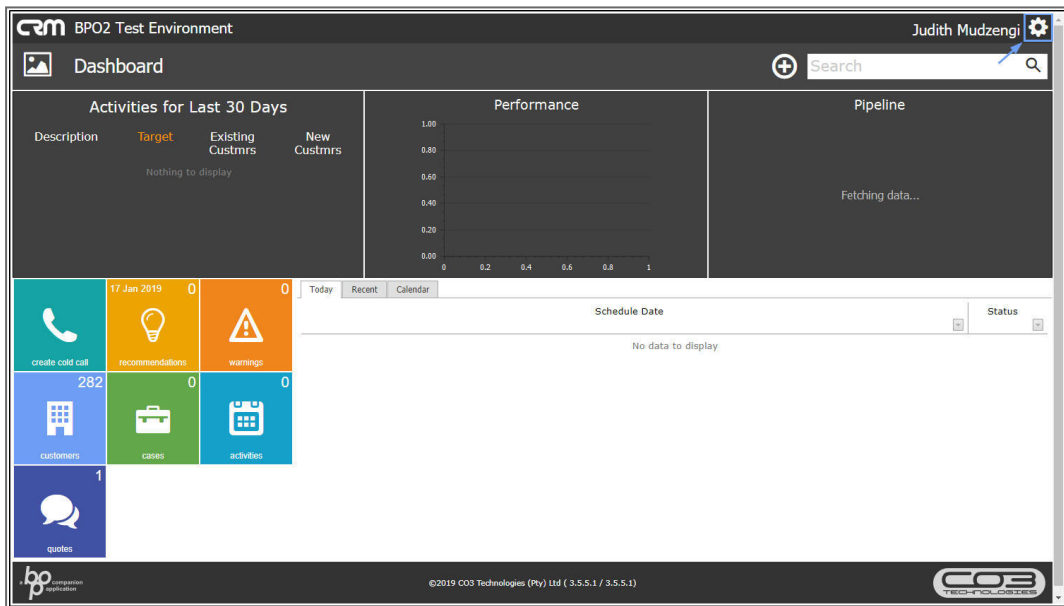
MY SETTINGS / ACCOUNT SETTING

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

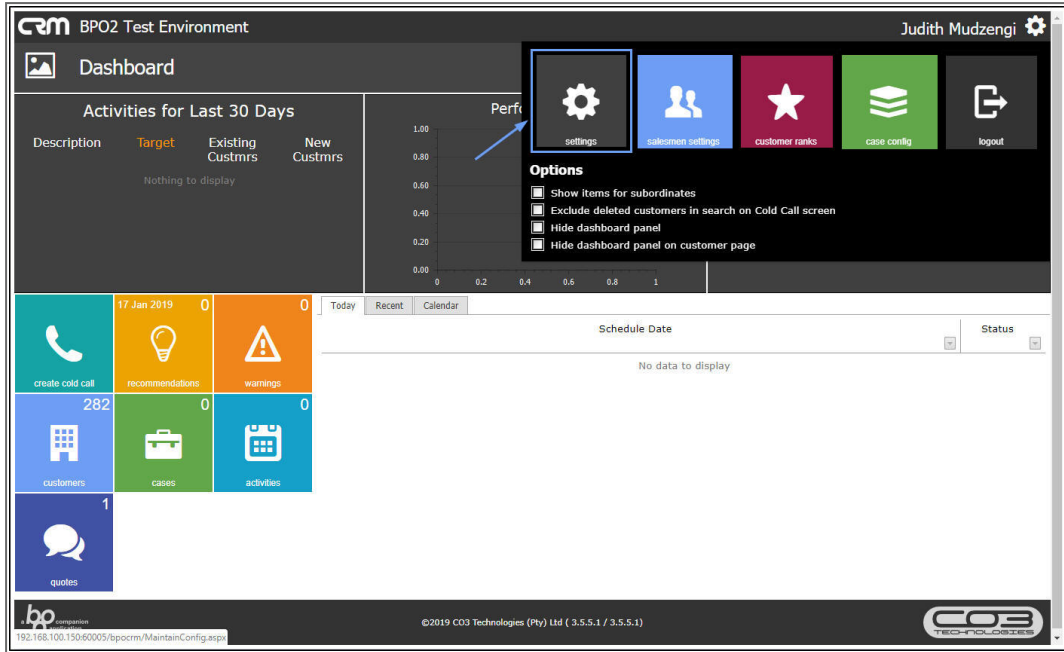
Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

MY SETTINGS – ACCOUNT SETTINGS

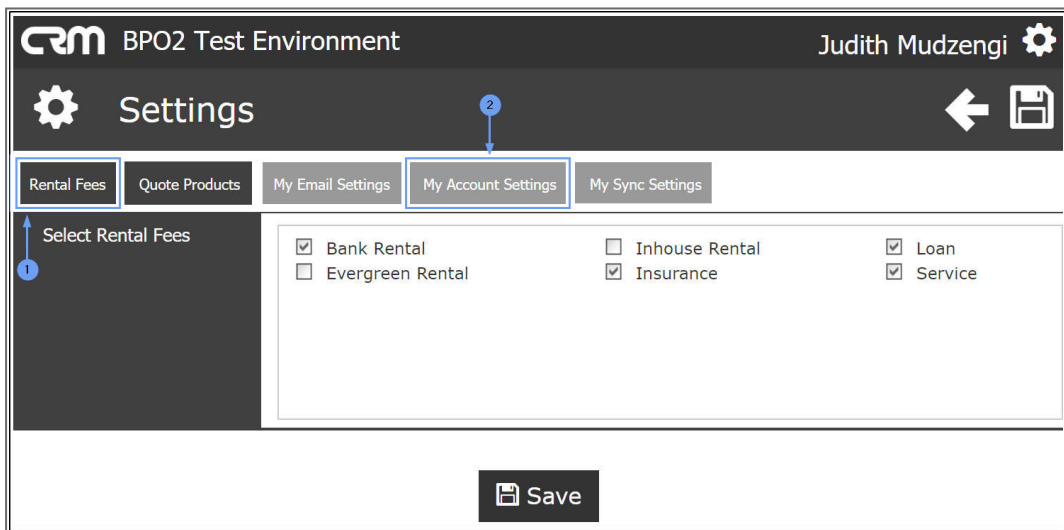
- Click on the **Settings** button to the right of your **UserName**.



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



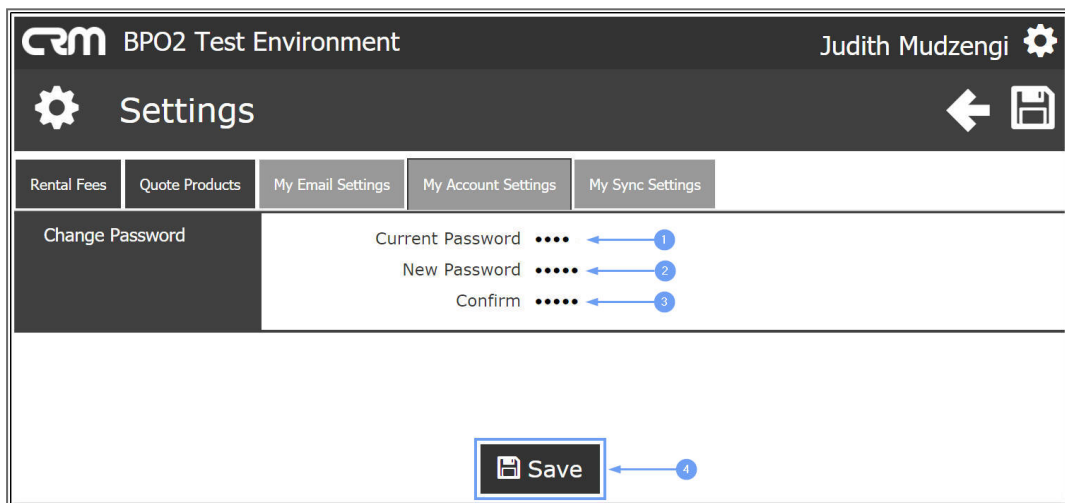
- The **Settings** screen will be displayed.
 1. The **Rental Fees** tab will be selected by default.
 2. Click on **My Account Settings** tab.



- 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 'Performance' chart, and several data cards. The 'Performance' chart is currently empty. The 'Pipeline' section shows 'Fetching data...'. The 'Activities for Last 30 Days' section is empty. The 'Schedule Date' section shows 'No data to display'. The dashboard also features a grid of quick-action cards for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', and 'quotes'.

Activities for Last 30 Days		
Description	Target	Existing Custms / New Custms
Nothing to display		

Performance
Empty chart

Pipeline
Fetching data...

Schedule Date
No data to display

Quick Actions
create cold call
recommendations (17 Jan 2019)
warnings
customers (282)
cases
activities
quotes (1)

CRM.003.001