

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]:[portno]/BPOCRM/User.aspx

SALESMEN SETTINGS / EMAIL SETTINGS

CM BPO2 Test Environment Judith Mudzengi		
Dashboard		🕒 Search
Activities for Last 30 Days	Performance	Pipeline
Description Target Existing New Custmrs Custmrs	0.80	
Nothing to display	0.60	Fetching data
	0.40	
	0.00 0.2 0.4 0.6 0.8 1	
17 Jan 2019 0 0 Today R	cent Calendar	
	Schedule Date	Status V
create cold call recommendations warnings	No data to displa	ay
customers cases activities		
quotes		
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• Click on the Settings button to the right of your UserName.

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



(CSUL)	BPO2 Test Environment	Judith Mudzengi 🍄 🅯
	Dashboard	
Descrip	Activities for Last 30 Days otion Target Existing New Custmrs Custmrs Nothing to display	Perfc 1.00 0.00
	17 Jan 2019 0 0 J Today	0.20 Hide dashboard panel on customer page 0.00 0.2 0.02 0.4 0.6 0.3 Recent Calendar
create cold	t cat recommendations warnings	Schedule Date Status
custome	es cases advites	
quotes		
. bo	nion Dr60005/bpocrm/MaintainConfig.aspx	©2819 CO3 Technologies (Phy) Ltd (3.5.5.1 / 3.5.5.1)

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

CRM BPO2 Test Er	nvironment		Judith Mudzengi 🌣
🤽 Salesmer	Settings		← 🗎
Salesmen Administrators Em	ail Settings Salesmen Assignments Salesmen Monthly Targets	Salesmen Commercials	
Salesmen	Tick the employees that are Salesmen.		
	Abigail Milne	V Dalene Pillay	🗌 Magdaia Eagland 🏠
02	Adele Weeder	Darryl Muller	Malory Allibon
	🔲 Adhishka Maharaj	🗹 Debbie Lugar	Marc Repsold
	Alex Spangenberg	Delaney Abramov	Marietta Craker
	Aline Iradukunda	Derrick Weeder	Marius Engelbrecht
	Almeria Teacy	Douglas Fuchs	Mark Mac Dougall
	Andromache Joselevitch	Dummy User	Matthew Phillips
	Angle Roseborough	Edwell Msakwa	Mena Buchner
	Armando Reichelt	El Nevins	Michelle Cloete
	Arv Huelin	Fanie Vasic	Miguel Goncalves
	Aurore Gillet	Garvey Engall	Nanon Chappelle
	Avni Balalee	Gary Buchner	Nicky Muller
	Bevan Venter	Gerard Rudolph	Nkululekho Ngcobo
	Bianca Du Toit	Helaina Durbyn	Noxolo Mbhele
	Blair Braunds	Ilana Kloppers	Oralla Shirley
	Bossmaster Me	Iorgo Baike	Pam Pillay
	Brigg Vettore	Isabel Espinoza	Rebecca Engelbrecht
	Byrle Breheny	James Magombo	Richard James
	Byron Lamb	Jennifer Watkins	Roderick Moodley
	Caleb Pillay	Joe Reynolds	Rosalyn Simacek
	Calvin Neethling	Johan Van der Linde	Saunders Whight
	Cameron Francis	John Engelbrecht	Shea Creane
	Carleen Symones	Jordan Flockhart	Snenhlanhla Ndwalane
	Chane McCuaig	Judith Mudzengi	Stefan Adendorff
	Cherie Kingsbury	Justin Burgess	Thabo Makhathini
	Chris Haynes	📋 Karlis Gilhool	Thivian Latchmanan
		Save	



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

CRM BPO2 Test	Environment	Judith Mudzengi 🌣
🤽 Salesme	en Settings	🔶 🗎
Salesmen Administrators	Email Settings Silesmen Assignments Silesmen Monthly Targets Silesmen Commercials	
Email Signature	 This is the default email signature that is used when salesmen email BPO/CRM documents, e.g. Quotes, Invoices, Contract Reports etc. If the salesman is new or does not have an existing signature then this signature will be used. 	
	2 単 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
	Design HTM Preview	
🛱 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.

CCM BPO2 Test	Environment	Judith Mudzengi 🌣
🤽 Salesme	en Settings	🔶 🚍
Salesmen Administrators	Email Settings Sulesmen Assignments Sulesmen Monthly Targets Salesmen Commercials	
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	※副目にちくウス*ス、田田西にもと回曲・私田 Normal Arial (Font Size) B / 単多田王田空・▲・	
	Much thanks Customer Care Email: customercare@noname.co.za	
	Tel 031 572 990	
	Design HTML Preview	
1 Save		



- 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 <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.

CRM BPO2 Test	Environment	Judith Mudzengi 🍄
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	义 『 i is ち / ♡ X' X; 日 旧 理 理 色 と ■ 冊・覧 田 Normal Arial (Font Size) B / U S ■ 田 国 型・▲・	
	Much thanks Customer Care Email: customerarie@noname.co.za Tel: 031 678 980	

• You will return to the **Dashboard**.



Company Default Email Settings

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🔀 Dashboard		Search Q
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