

Profile Settings

- [Contact Details](#)
- [Signature](#)
- [Password Reset](#)
- [Email Credits](#)
- [SMS Credits](#)

Contact Details

Signature

Password Reset

What Is the Forgot Password Feature?

The Forgot Password feature allows users to reset their AgentRoof CRM password if they are unable to access their account.

A password reset link will be sent to the registered email address associated with the account, allowing the user to create a new password and regain access to AgentRoof CRM.

Reset Your Password

Access the Forgot Password Page

1. Navigate to the AgentRoof CRM login page.
2. Click **Forgot Password?**

The Forgot Password page will be displayed.

Request a Password Reset Link

1. Enter the email address associated with your AgentRoof CRM account.
2. Click **Submit**.

A confirmation message will be displayed indicating that a password reset link has been sent if the email address exists in the system.

Create a New Password

1. Open the email inbox associated with the registered email address.
2. Locate the password reset email.
3. Click the password reset link provided in the email.
4. Enter your new password.
5. Confirm the new password.
6. Submit the changes.

Your password will be updated successfully.

Sign In with the New Password

1. Return to the AgentRoof CRM login page.
2. Enter your registered email address.

3. Enter your newly created password.
4. Click **Login**.

You will be logged in to your AgentRoof CRM account successfully.

“ Notes

- The password reset email is only sent if the email address exists in AgentRoof CRM.
- Ensure you enter the email address associated with your account.
- If you do not receive the email, check your spam or junk folder.
- Password reset links should be used promptly after they are received.

Conclusion

You have successfully learned how to reset your AgentRoof CRM password using the Forgot Password feature.

Email Credits

What Are Email Credits?

Email Credits determine the number of emails that can be sent from your AgentRoof CRM account.

Each account is configured with a default monthly email credit allocation. If additional credits are required, they can be purchased separately.

Purchased email credits are valid for 30 days from the date of purchase.

View Email Credits

1. Click your profile icon.
2. Select **Email Credits**.

The Email Credits page will be displayed.

From this page, you can view:

- Available Email Credits
- Monthly Credit Allocation
- Credit Usage
- Additional Credit Purchase Options
- Purchase History

The Purchase History section displays all previously purchased email credit plans.

Purchase Additional Email Credits

1. Navigate to **Profile > Email Credits**.
2. Click **Purchase Additional Credits**.

A list of available email credit plans will be displayed.

3. Locate the desired plan.
4. Click **Buy Now**.

A payment window will appear.

Enter the required payment details:

- Card Number

- Expiry Date
- Security Code
- Country

5. Click **Pay Now**.

The purchase will be processed successfully.

The purchased email credits will be added to your account immediately.

“ Note:

All purchased email credit plans have a validity period of 30 days from the purchase date.

Any unused purchased credits will expire after the validity period ends.

Credit Usage Priority

If a new monthly email credit allocation is added while purchased credits are still available, the purchased credits will continue to be used before the monthly allocated credits.

Once the purchased credits are fully used or expire, the system will begin using the monthly allocated credits.

Conclusion

You have successfully learned how to manage Email Credits in AgentRoof CRM.

SMS Credits

What Are SMS Credits?

SMS Credits determine the number of text messages that can be sent from your AgentRoof CRM account.

Each account is configured with a default monthly SMS credit allocation. If additional credits are required, they can be purchased separately.

Purchased SMS credits are valid for 30 days from the date of purchase.

View SMS Credits

1. Click your profile icon.
2. Select **SMS Credits**.

The SMS Credits page will be displayed.

From this page, you can view:

- Available SMS Credits
- Monthly Credit Allocation
- Credit Usage
- Additional Credit Purchase Options
- Purchase History

The Purchase History section displays all previously purchased SMS credit plans.

Purchase Additional SMS Credits

1. Navigate to **Profile > SMS Credits**.
2. Click **Purchase Additional Credits**.

A list of available SMS credit plans will be displayed.

3. Locate the desired plan.
4. Click **Buy Now**.

A payment window will appear.

5. Enter the required payment details:
 - Card Number

- Expiry Date
 - Security Code
 - Country
6. Click **Pay Now**.

The purchase will be processed successfully.

The purchased SMS credits will be added to your account immediately.

SMS Credit Validity

All purchased SMS credit plans have a validity period of **30 days** from the purchase date.

Any unused purchased credits will expire after the validity period ends.

Credit Usage Priority

If a new monthly SMS credit allocation is added while purchased credits are still available, the purchased credits will continue to be used before the monthly allocated credits.

Once the purchased credits are fully used or expire, the system will begin using the monthly allocated credits.

You have successfully learned how to manage SMS Credits in AgentRoof CRM.