Title: **Using External Email – ActionCoach CRM**
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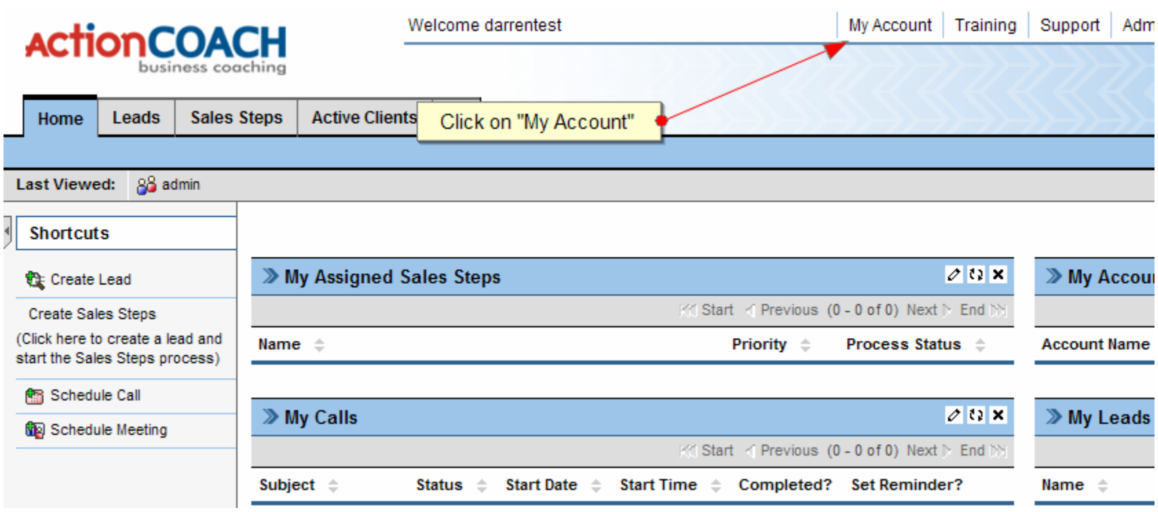
ActionCoach CRM User Guide: Setting up external email

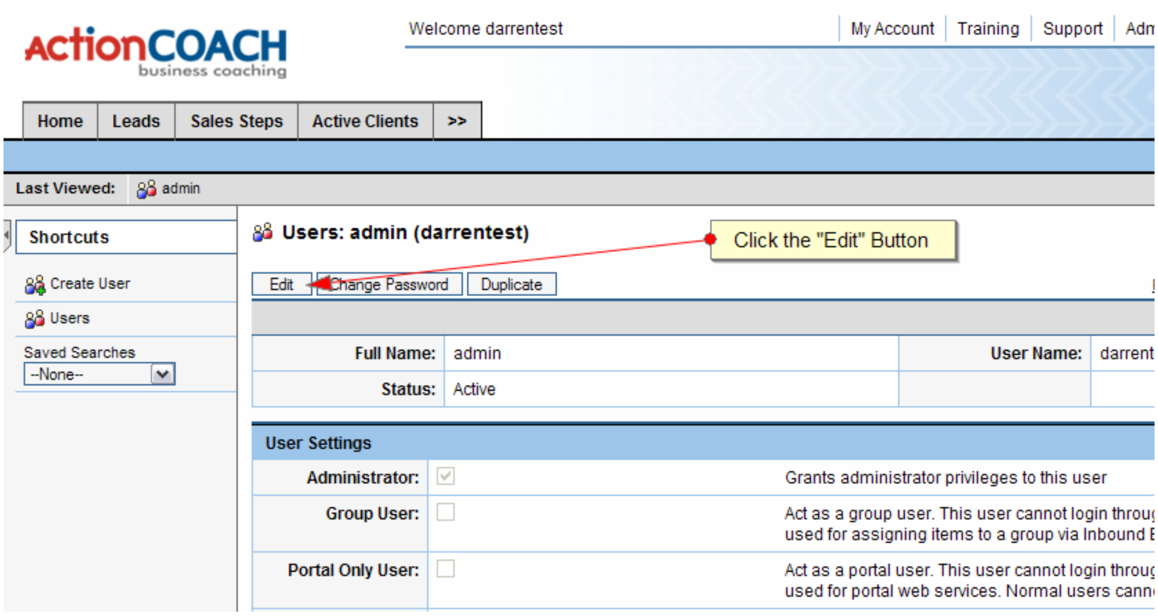
Your ActionCoach CRM can allow for management of your email from any POP or IMAP email account you wish. This guide provides the information you need to configure and use this feature.

Step 1: Configure your email settings

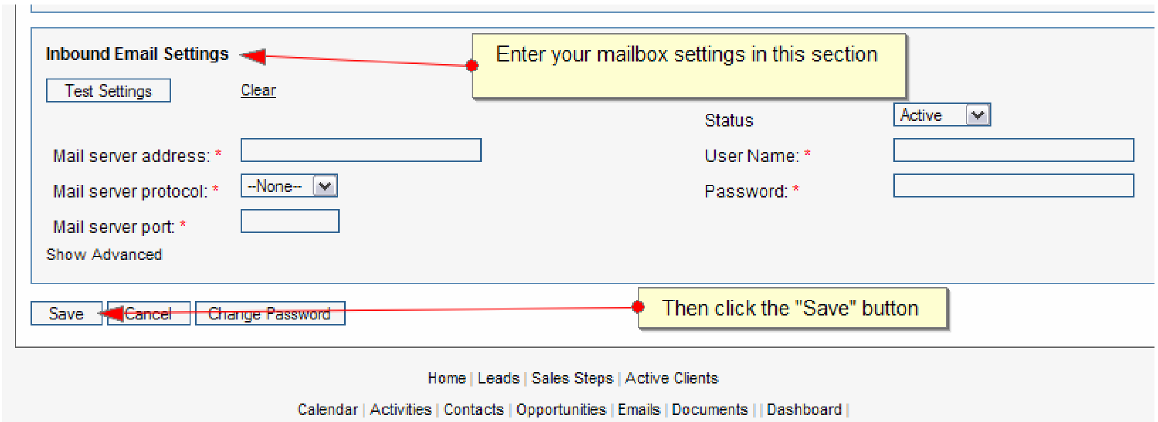
Click on the My Account option at the top after logging in to your CRM



From there, click the “Edit” button to edit your account information



At the bottom of the Edit screen, you will see “Inbound Email Settings”. This is where you can enter your mail server, username, and password. The “mail server port” will select automatically to the default once you choose POP or IMAP as the protocol. If you need help knowing which one to use, please check with your email administrator.



Step 2: Using the Email feature

Once configured, you can visit the “Emails” tab from the menu. You may need to mouse over the “>>” to see the expanded tab options. From this screen, use the “Check Email” button to pull in any new external email from your account. Once the email is in your CRM, you can manage it from there and also use the “Quick Create” to associate it with other CRM objects.