



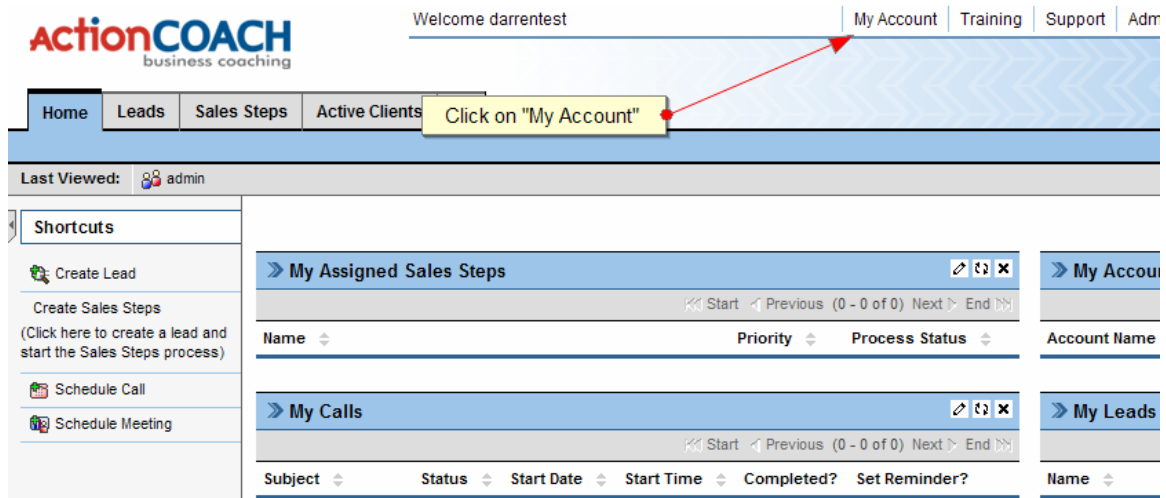
Title: **Using External Email – ActionCoach CRM**
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ActionCoach CRM User Guide: Setting up external email

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.

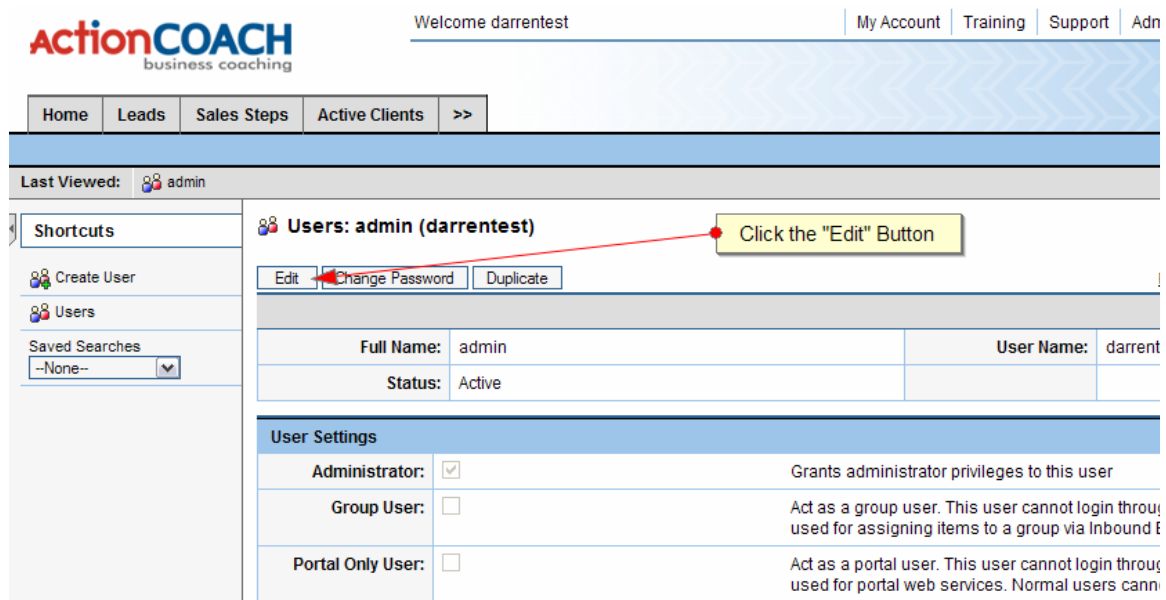
Step 1: Configure your email settings

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



The screenshot shows the ActionCoach CRM dashboard. At the top, there is a navigation bar with the ActionCoach logo on the left and the text "Welcome darrentest" in the center. On the right side of the navigation bar, there are links for "My Account", "Training", "Support", and "Admin". Below the navigation bar, there is a secondary menu with buttons for "Home", "Leads", "Sales Steps", "Active Clients", and "My Account". A yellow callout box with the text "Click on 'My Account'" points to the "My Account" button. Below the secondary menu, there is a "Last Viewed:" section showing "admin". On the left side, there is a "Shortcuts" section with links for "Create Lead", "Create Sales Steps", "Schedule Call", and "Schedule Meeting". The main content area is divided into two sections: "My Assigned Sales Steps" and "My Calls". Each section has a table with columns for Name, Priority, Process Status, and Account Name. The "My Calls" section has columns for Subject, Status, Start Date, Start Time, Completed?, and Set Reminder?.

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



The screenshot shows the ActionCoach CRM user management page. At the top, there is a navigation bar with the ActionCoach logo on the left and the text "Welcome darrentest" in the center. On the right side of the navigation bar, there are links for "My Account", "Training", "Support", and "Admin". Below the navigation bar, there is a secondary menu with buttons for "Home", "Leads", "Sales Steps", "Active Clients", and ">>". Below the secondary menu, there is a "Last Viewed:" section showing "admin". On the left side, there is a "Shortcuts" section with links for "Create User", "Users", and "Saved Searches". The main content area is divided into two sections: "Users: admin (darrentest)" and "User Settings". The "Users: admin (darrentest)" section has a table with columns for Full Name, User Name, and Status. The "User Settings" section has a table with columns for Administrator, Group User, and Portal Only User. A yellow callout box with the text "Click the 'Edit' Button" points to the "Edit" button in the "Users: admin (darrentest)" section.

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.

