

ActionCoachCRM Configuring Signatures

1. Open browser and type the URL for your CRM. This is available to you in the original registration email sent to you.
2. Login to the CRM with your username and password. This information was sent to you in the original registration email.

Welcome to



Please enter your username and password.

User Name (demoac)

Password (del123)

[Options](#)

Figure 1

3. Click on the "My Account" located on the top right corner of the screen (see Figure 2 below)



Figure 2

4. Click on the "Edit" button as shown in Figure 3 below.

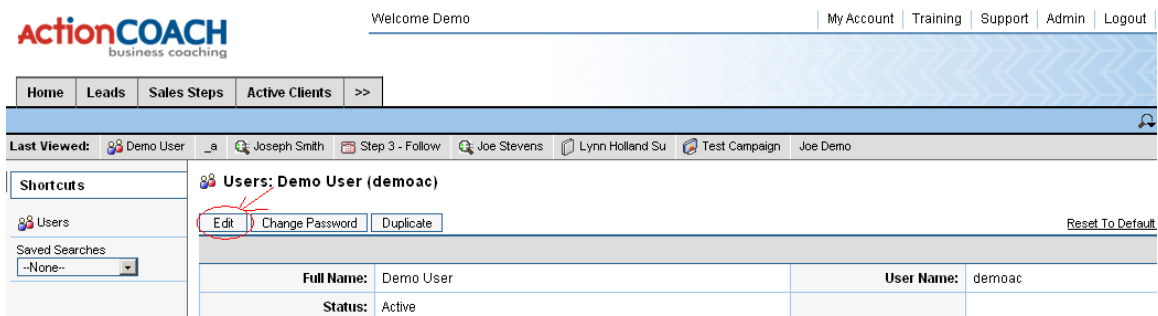


Figure 3

5. Scroll down the page and under the "Email Option" heading click on the "Create" button as shown in the figure 4 below

Email Options

Email address: Other email address:

Reply-to name:

Signature: **Create** Edit

Email client:

Compose format:

Signature above reply?:

Show email counts?:

Outbound Character Set:

Outbound Email Settings

Mail transfer agent:

Inbound Email Settings

Mail server address: *

Mail server protocol: *

Mail server port: *

Show Advanced

Status:

User Name: *

Password: *

Figure 4

6. When you click on the "Create" button, a new popup window will open. Paste the signature generated by Signature generator in the HTML signature box by clicking on the 'Paste' icon. (Shown below) and click on the "Save" button.

The Signature Generator tool can be found in your ActionMembers account. You can also use the built in Editor to design your own signatures.

Signature

* Indicates required field

Full Name *

HTML signature:

Signature:

Figure 5

7. Finally click on "Save" button on the main page (shown below) to save your changes.

The screenshot displays the ActionCoach business coaching interface. At the top left is the ActionCoach logo. The top right contains navigation links: Welcome Demo, My Account, Training, Support, Admin, and Logout. Below this is a menu bar with Home, Leads, Sales Steps, Active Clients, and a double arrow button. A breadcrumb trail shows: Last Viewed: Demo User, a search icon, Joseph Smith, Step 3 - Follow, Joe Stevens, Lynn Holland Su, Test Campaign, and Joe Demo. The main content area is titled 'Users: Demo User(demoac)' and features three buttons: 'Save', 'Cancel', and 'Change Password'. The 'Save' button is circled in red. Below the buttons are form fields for 'First Name' (Demo), 'Last Name *' (User), and 'Status *' (Active). A 'User Name *' field contains the text 'demoac'. On the left side, there are sections for 'Shortcuts' (Users), 'Saved Searches' (None), and a dropdown menu.