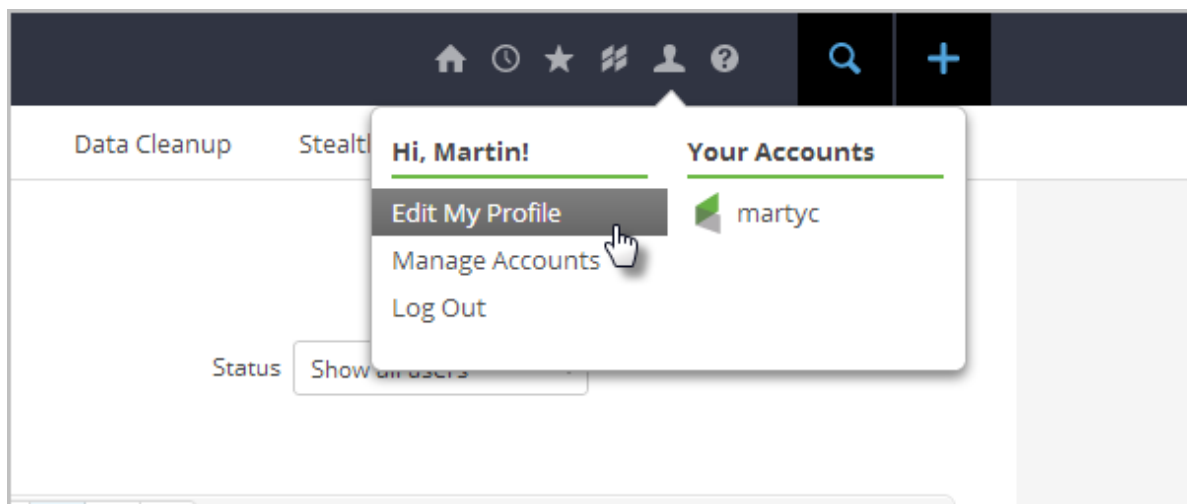


Customize Your Email Signature

Edit Your Email Signature

1. Click on **Edit My Profile** in the user toolbar to customize or update your profile.



2. On the right side of the page, you'll see the **Email Signature** section. This shows you what your signature will look like when it is merged into emails. You can also upload an image of your business logo or an image/avatar of yourself.

General | Preferences | Signatures (legacy) | Notes | User Groups

Infusionsoft ID
 Alwayshelpful Support
 Support@alwayshelpful.org

Personal Info
 Company
 Title: Support Department
 Email: Support@alwayshelpful.org

Address
 Street Address 1
 Street Address 2
 City
 State
 Postal Code

Other Info
 Phone 1: Work (907) 744-5221
 Phone 2: Mobile (706) 744-5221
 Fax 1: Work
 Fax 2: Work
 Website: http://www.alwayshelpful.org/
 Country: Please select a country

Email Signature
 Signature Image: Alwayshelpful Support
 Support Department
 Work: (907) 744-5221 | Mobile: (706) 744-5221
 Support@alwayshelpful.org
 www.alwayshelpful.org/

Save | Edit User Permissions | Deactivate

3. Your Signature will automatically update with the information entered in

- Infusionsoft ID Name
- Company
- Title
- Email
- Phone 1 & 2
- Website

Change Your Preferences

Preferences: Increase efficiency by setting up preferences that correspond with job responsibilities. Make sure each user has quick access to the most relevant information to perform their daily tasks within Infusionsoft.

Misc

Default Tab on Contact Second Row

Default Search Type

Default Start Page ☒ My Nav (top link) ☐ Dashboard ☐ Custom

Default Search View ☒ Interactive ☐ Grid

Signature at Top of Reply Yes ☐ No ☒

Calendar

- **Default Tab on Contact Second Row:** This setting controls which tab shows up first when you view the lower portion of a contact. The tasks tab is the default view. Use this setting to ensure the most relevant history is displayed for each user's role (i.e., a sales rep needs to see opportunities.)
- **Default Search Type:** This setting controls the default search type for the quick search box located at the top right of your Infusionsoft application. Select from Contact, Company, Task/Appt/Note, Order, Subscriptions, or Opportunity.
- (Optional) **Default Start Page:** This setting controls the first page a user sees when they sign in to Infusionsoft. Navigate to the page you want to use as your home page and copy the URL beginning with /Admin/ from a different page to override the default (e.g., /Admin/myFiles.jsp.) The Infusionsoft home page is the default.
- (Optional) **Default Search View for Contacts and Opportunities:** This setting controls the way you view lists of contacts and opportunity records. Interactive View increases efficiency when working and updating lists. You can change this to grid-view if you prefer to view more records per screen and align the data into spreadsheet-style columns.
- (Optional) **Signature at Top of Reply:** This setting controls the location of your signature in email replies sent by the Infusionsoft email client. Skip this if you are using the Outlook Plug-In or a different email program to check your email. This is set to *no* by default. Set it to *yes* if you are using the Infusionsoft email client to check and reply to email messages.
- **Default Calendar View:** This setting controls the number of days displayed on your calendar. It is set to day by default. Select from day, week, or month.
- **Default Start and End Hour:** This setting controls the daily time range displayed on the your calendar. Adjust these settings if a user works non-standard hours.

- **Time Zone:** Your time zone will be auto-detected when you first create your Infusionsoft account.

Manage User Groups

- **Admin:** Assign a user to the admin group if their job responsibilities include advanced Infusionsoft administration (e.g., importing, setting up system defaults, managing users.) Users in the admin group have access to all areas of Infusionsoft and view all of the available reports. They will be able to use your Infusionsoft system without restriction.
 - **Sales Rep:** Assign a user to the sales rep group if their job responsibilities include contacting leads, tracking the sales process through opportunities (e.g., adding notes, moving sales stages.) Users in the sales rep groups can create and be assigned to an opportunity.
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