



Get Your CRM Profile Ready in Minutes

Your profile helps personalize your communication inside the CRM. Use this sheet as a quick setup guide before you start messaging or scheduling.



Step 1: Personal Details

- Full Name
- Email & Phone
- Profile Picture Uploaded
- Time Zone Set

Profile Image
The proposed size is 512*512 px no bigger than 2.5 MB

First Name *

Last Name *

First Name

Last Name

Email *

Phone

Extension

Email

Phone

Extension

Calendar

Platform Language

English (United States)



Step 2: Email & Signature

- Email address verified
- Email signature added (include name, title, phone, website, logo if allowed)
- Test email sent successfully

Signature

☐ Enable signature on all outgoing messages

Inter14px1.5Paragraph

B *I* U

Create your email signature

☐ Include this signature before quoted text in replies

Update Profile



Step 3: Notifications & Preferences

- Notifications turned on for new messages
- Notifications turned off for areas you don't use
- Preferred contact method (email/text) selected

Notification Settings

Conversation Notifications

Notify for all new conversations & messages related with the account

Notify when a conversation gets assigned to me

Notify for new messages in a conversation I am assigned to

Notify when you are mentioned in a new conversation

Notify for all new messages in conversations where you are mentioned

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Task Notifications

Notify when a task gets assigned to me

Get a reminder 15 minutes before an upcoming task

Send a daily summary of due tasks at 10:00 AM - 12:00 PM

Send a daily summary of overdue tasks at 10:00 AM - 12:00 PM

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Feedback

Notify when a new review is received

☒☒☐

Google

Notify when a new review is received

☒☒☐

Calendar Notifications

Notify when calendar integration is disconnected

☒☒☐

Cancel

Save



Step 4: Password & Security

- Password updated (if prompted)
- Two-factor authentication set up (if available)
- Bookmark or save login URL

Change Password

Current Password *

Current Password

Password *

Password

Confirm Password *

Confirm Password

Update



Step 5: Quick Personalization Tips

- Keep your name consistent across messages.
- Use a friendly tone in your signature.
- Update your profile photo every 6–12 months.

Profile Image
The proposed size is 512*512 px no



Ready for the next step?

Head into your CRM and complete your setup today — your future self (and your team) will thank you!