

## Contactually 101: Step 4..... Settings

Under your picture on the top right are all of your settings. Let's set them up now.

First is Email. Here you can link as many email accounts as you want. You can only use one signature however, so choose something that will go with all of your emails. You can always change it by typing over it when you send an email or by changing it on a template, but if you don't change it, the one you set here in the preferences is the one that will be used.

Tip: If you have a super signature that you use elsewhere, go to your email program like you were composing a message to someone and copy the signature and then paste it into Contactually.

Second is Social. Here you can link your Twitter, Linked in and Facebook accounts. This is important because Contactually will pull info from these accounts too making your database even better. Contactually will even recognize if you've direct messaged with people in these networks and know you don't need a reminder to contact them because you've already been in contact. Pretty powerful, right?!

Skip down to Calendar and link your calendar here.

If you have Alias you send mail as that are not already linked under the Email tab, you can add those under Email Aliases.

Skip down to Follow-ups. This is where you set how many reminders to contact people you want to get, how often you will get them and whether you want them on your Dashboard only or by email too. You can also set Contact statistics each week on how you are doing with the system. Be sure to set the time zone here to Eastern (US & Canada).

Skip down to Article Sharing. Drag the big green button that says +ADD TO CONTACTUALLY to your bookmarks bar. We'll go over article sharing later, but add this to your bookmarks now so you'll have it handy.

Skip down to Profile and add your picture if it is not already there.