



# Ask An Expert – Personalizing Your Actionstep System





# Ask An Expert Content



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TEAM

# Natasha Dubauskas-Reed

## Customer Success Specialist

Natasha is part of the Customer Success team at Actionstep. Having come from the legal industry Natasha has a wealth of experience in how to use Actionstep to obtain the maximum benefit for your law firm. She is more than willing to offer expert advice, hints, and tricks – feel free to reach out to her at [natasha.dubauskas-reed@actionstep.com](mailto:natasha.dubauskas-reed@actionstep.com).





## TEAM

# Liliana Peneva

## Customer Success Manager

Liliana is part of the Customer Success team at Actionstep. She works with clients to help them optimize usage of Actionstep's software solutions so that they improve productivity and achieve their business goals. Prior to joining Actionstep Liliana worked in HR recruitment. Feel free to reach out to her at [Liliana.peneva@actionstep.com](mailto:Liliana.peneva@actionstep.com).



# Personalizing Your Actionstep System

Learn how to customize your Actionstep system to suit your law firm!

In this Ask An Expert session you will learn all about personalization, such as profile photos, logos, signatures and matter type icons, but these are just a few of the options Actionstep has to personalize your system.

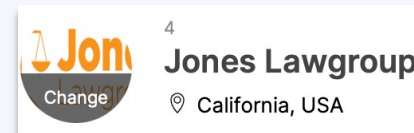
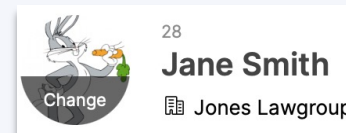
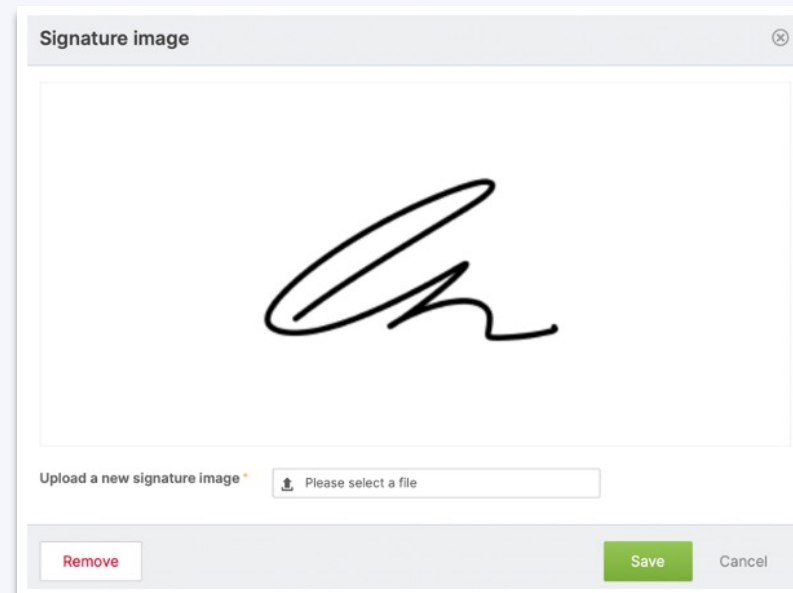


# Profile Photos, Logos & Signatures

Your Actionstep system can be easily customized to suit your preference.

- Add a photo to your staff profiles.
- Upload your electronic signature to save time when signing documents.
- Add your company logo to make your Actionstep system unique and relevant to your law firm.

All of this can be done by editing your company and contact profiles. Instructions on this and more can be found in our user guide which we will send you links to after the session.




# Matter Type Icons

Matter types are loaded with a default Actionstep icon, but you can change these to make matter types stick out and be easier to find.

Actionstep have a range of icons that you can select from, or you can upload your own if you have pictures that best represent the work you do.

**Matter type icon**

































Icon 

Change icon ☒

Upload your own icon

Icons should be 64px x 64px in png, gif, jpg or bmp format. Any images larger or smaller will be resized automatically.

Or select one from below



# Questions & Demonstration

Now is your chance to 'Ask an Expert' –  
comment questions in the chat section