



Act! CRM Classic Quick Start Guide

Powerfully Simple CRM

Welcome to your 14-day trial of Act! CRM Classic. This guide will lead you step by step through the initial set-up process.

Help & Troubleshooting


act.com/en-uk/resources/act-crm

Support Team: 0845 268 0220

Monday-Friday | 9:00am-5pm (UK time)


1 Importing Data

To get started, you will first need to add contacts and records to your Act! database. To import data to Act! from another source, use one of the icons located at the top of the Welcome screen.



Upload

Import data from a CSV file or another CRM



Import

Upload a database from a prior version of Act!



Insert Demo Data

Automatically populate contacts with sample data

2 Creating New Contacts

You can also create new Contacts in Act! by clicking on the Contacts button in the blue menu on the left side of your screen.

1. Click **Contacts**
2. Click **New** in the upper right corner
3. Enter Contact Name & remaining fields
4. Click **Save**.

3 Creating Groups

You can organise similar contacts into Groups for targeted communications or sales initiatives.

1. Click **Groups** in the left navigation menu
2. Click **New** in the upper right corner
3. Add a group name and description
4. Click **New** to create a new group

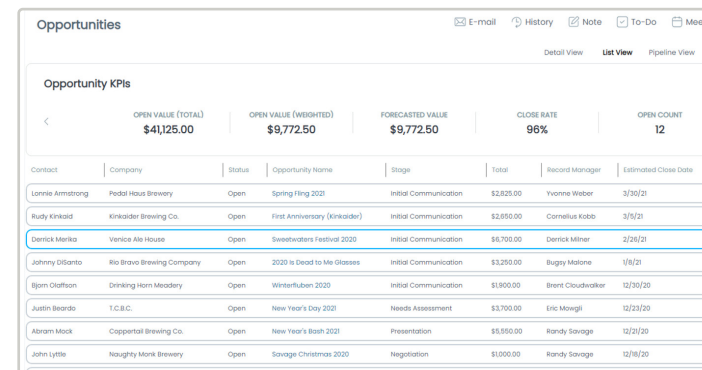


Create groups to send emails to in Act! Marketing Automation.

4 Creating Opportunities

Opportunities help you track and close sales and manage your team's workload. Assign products and services to each opportunity to monitor your forecast.

1. Click **Opportunities** in the left navigation menu
2. Click **New** in the upper right corner
3. Enter opportunity details
4. Click **Products/Services**.
5. Click **Add Product**.
6. Fill in the necessary fields, then click **OK**.



Contact	Company	Status	Opportunity Name	Stage	Total	Record Manager	Estimated Close Date
Lynne Armstrong	Pedal Haus Brewery	Open	Spring Fling 2021	Initial Communication	\$2,825.00	Yvonne Weber	3/30/21
Rudy Kinkaid	Kinkaid Brewing Co.	Open	First Anniversary (Kinkaid)	Initial Communication	\$2,850.00	Cornelius Kobb	3/5/21
Derrick Merika	Venice Ale House	Open	Sweetwaters Festival 2020	Initial Communication	\$1,700.00	Derrick Milner	2/26/21
Johnny DiSanto	Rio Bravo Brewing Company	Open	2020 is Dead to Me Glasses	Initial Communication	\$3,250.00	Bugby Malone	1/8/21
Egon Claffson	Drinking Horn Meadery	Open	Winterhuben 2020	Initial Communication	\$1,900.00	Brent Cloudwalker	12/30/20
Justin Beardo	T.C.B.C.	Open	New Year's Day 2021	Needs Assessment	\$3,700.00	Eric Mongil	12/23/20
Abram Mack	Copperfall Brewing Co.	Open	New Year's Bash 2021	Presentation	\$5,850.00	Randy Savage	12/21/20
John Lytle	Naughty Monk Brewery	Open	Savage Christmas 2020	Negotiation	\$1,000.00	Randy Savage	12/16/20



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5 Exploring Marketing Automation

Act! Marketing Automation helps you create automated communications with plug-n-play email templates and campaigns.

Keep in touch with every customer via regular check-ins and deliver superior customer service through targeted promotions and personalised thank you, survey, and follow-up communications.

1. Click **Marketing Automation**
2. Choose one of the prebuilt campaigns to begin setting up your first campaign!

 Visit the **Act! Knowledge Base** to learn more about marketing automation.



6 Ready to Get Started with Act!?

Act! CRM Classic is a smart and powerful customer relationship management tool that helps drive repeat business and referrals.

Click the **Buy Now** button at the top of your screen to choose the plan that's right for your business.

