



# Act! CRM Quick Start Guide

The CRM you'll want to use every day.

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

## Help & Troubleshooting


[act.com/resources/actcrm](http://act.com/resources/actcrm)

Support Team: 866-873-2006


Monday-Friday | 8:30am-8:00pm EST

## 1 Importing Data


To import data to Act! from another source, select one of the methods in the Welcome to Act! popup. You can reopen this popup at any time by selecting Get Started with Act! in the trial banner.



**Import Demo Data**  
Contacts, History,  
Tasks and more



**Upload**  
an existing Act!  
database




**Import**  
a CSV file

## 2 Creating New Contacts

You can also create new Contacts in Act! by selecting Contacts in the main menu.


1. Select **Contacts** in the main menu
2. Select **Add New** in the upper right corner
3. Enter contact name and details
4. Select **Save** or **Save and add another**

 Try adding a task to that contact by selecting "Tasks" in the submenu, and select **New**.

## 3 Creating Lists

You can organize similar contacts into Lists for targeted communications or sales initiatives.

1. Select **Lists** in the main menu
2. Select **Add New** in the upper right corner
3. Add a list name and define criteria
4. Preview results and save

 Create lists to send emails 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. Select **Opportunities** in the main menu
2. Select **Add New** in the upper right corner
3. Enter opportunity details and save
4. Select **Products** and **Services** to add a product

## 5 Settings

Tailor your Act! account to meet your needs. Go to Settings to update preferences and create custom fields unique to your business.



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## 6 Exploring Marketing Automation

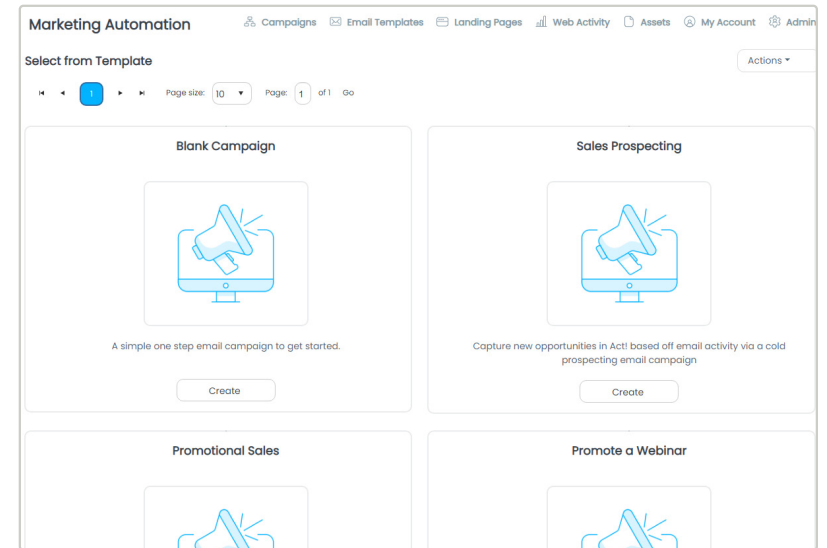
Act! Marketing Automation helps you create automated communications with plug-n-play email templates and campaigns.

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

1. Select 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.



## 7 Ready to Get Started with Act!?

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

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

## 8 Still need help?

Speak to an Act! specialist by calling 866-873-2006.