



Quick Start Guide

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

Help & Troubleshooting

Support Team: 866-873-2006
Monday-Friday | 8:30am-8:00pm EST

1 Importing Data

Your trial contains sample contacts to help you explore Act! more easily. However, if you prefer to add your own contacts, you can simply click on “**Remove Demo Data**” and import data to Act! from another source, by using one of the icons 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!

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 organize 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**.

Opportunity KPIs	OPEN VALUE (TOTAL)	OPEN VALUE (WEIGHTED)	FORECASTED VALUE	CLOSE RATE	OPEN COUNT
	\$41,125.00	\$9,772.50	\$9,772.50	96%	12

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 Olafsson	Drinking Horn Meadery	Open	Winterhuben 2020	Initial Communication	\$1,900.00	Brent Cloudwalker	12/30/20
Justin Beard	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 personalized 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! 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.

Create New Campaign

Start with a blank canvas or explore some of our helpful templates

[All Templates](#)

[My Templates](#)

[View By Type](#)

[View by Industry](#)



Blank Campaign

A simple one step email campaign to get started.



Sales Prospecting

Capture new opportunities in Act! based off email activity via a cold prospecting email campaign



Promotional Sales



Promote a Webinar