



Act! CRM Classic

Quick Start Guide

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/resources/act-crm

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

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 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
Lynnda Armstrong	Pedal Hubs Brewery	Open	Spring Fling 2021	Initial Communication	\$2,825.00	Yvonne Weber	3/30/21
Rudy Kirkald	Kirkald Brewing Co.	Open	First Anniversary (Kirkald)	Initial Communication	\$2,850.00	Cornelius Kubit	3/5/21
Derrick Merika	Vanica Ale House	Open	Sweetwaters Festival 2020	Initial Communication	\$6,700.00	Derrick Milner	2/29/21
Johnny DiBarto	Rio Bravo Brewing Company	Open	2020 is Dead to Me Glasses	Initial Communication	\$3,250.00	Bugby Malone	1/8/21
Egon Clifton	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 Mowgli	12/23/20
Abram Mack	Copperhill Brewing Co.	Open	New Year's Bash 2021	Presentation	\$5,050.00	Randy Savage	12/21/20
John Lytto	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! 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.

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