act!™

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

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

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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

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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.

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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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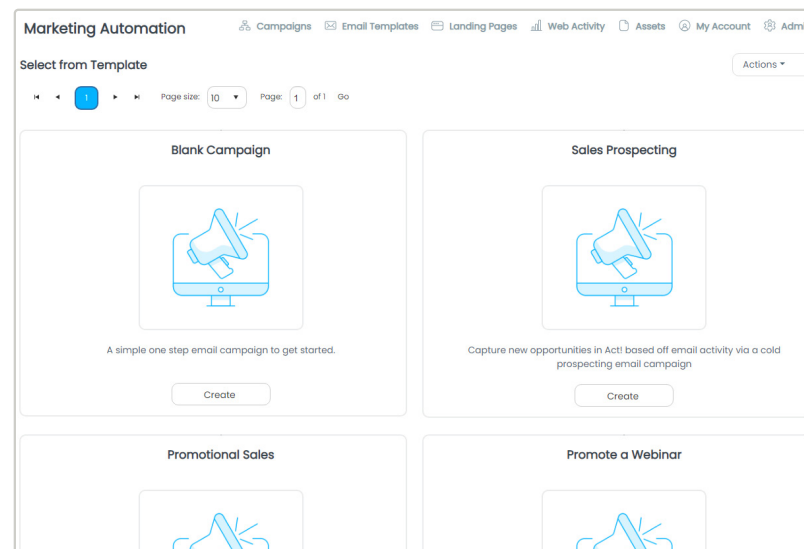**6** **Exploring Marketing Automation**

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.

Marketing Automation — Campaigns, Email Templates, Landing Pages, Web Activity, Assets, My Account, Admin

Select from Template

Page size: 10   Page: 1 of 1   Go

Blank Campaign — A simple one step email campaign to get started. — Create

Sales Prospecting — Capture new opportunities in Act! based off email activity via a cold prospecting email campaign — Create

Promotional Sales

Promote a Webinar

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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 **Want to see Act! in action?**

Register for a live demo with an Act! specialist.