



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

Act! makes it easy to get started

Follow these 3 easy steps to get up and running right away

1 Integrate your email

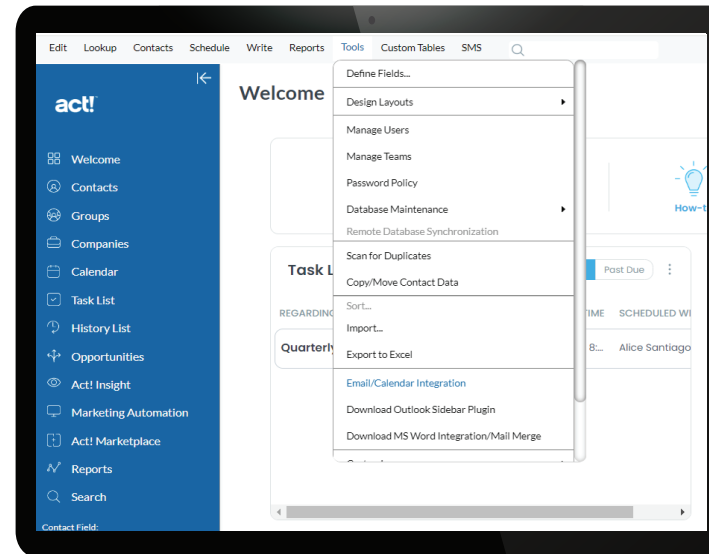
- Select "Email/calendar integration" from the Tools dropdown menu.
- Choose your email provider.
- Enter your email address.
- Select the services you wish to sync with Act! (e.g. emails, contacts, and calendar events).
- Follow the prompts to sign in to your email account and a confirmation message will appear indicating your email account is connected with Act!

2 Confirm calendar setup

- Review the Act! Calendar to view imported calendar events.

3 Confirm Contact Import

- Review your contacts in Act! to view imported contacts.



It's that easy! Your contacts and calendar are now synchronized, and your email exchanges moving forward, will be recorded and found in the History tab within a contact record.

Keep reading to see what else you can do with your Act! Premium Trial



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Importing your data (if you don't use GSuite or Outlook)

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

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**.

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

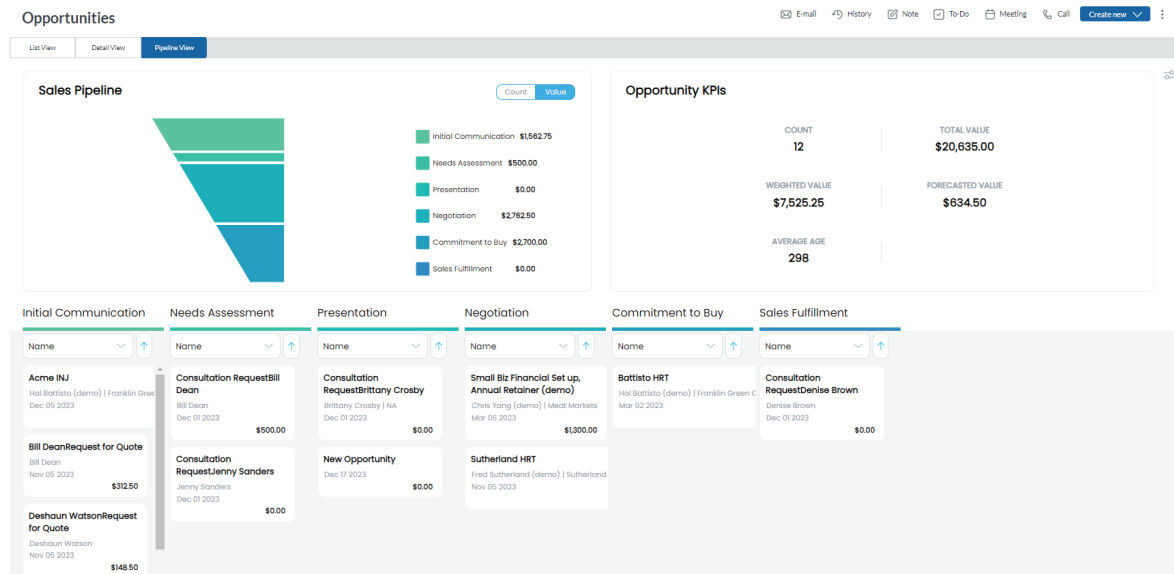


Create groups to send emails to in Act! Marketing Automation.

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**.





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Up your email marketing and lead capture efforts with Act!'s new AI Writing Assistant, powered by OpenAI!

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

Leverage advanced AI within Act! Marketing Automation to:

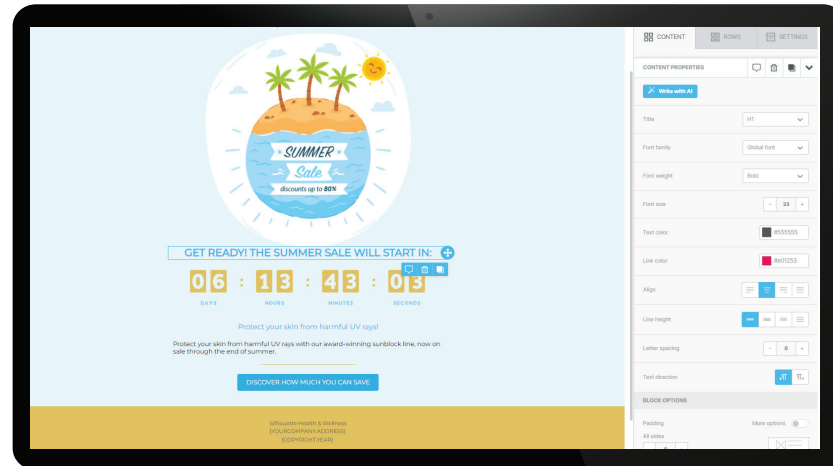
- ✓ Generate engaging and relevant marketing content with minimal effort.
- ✓ Easily correct grammatical mistakes to ensure your copy is professional and polished.
- ✓ Translate your marketing copy to connect with a diverse customer base.

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.



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.