

Account Setup Cheat Sheet

This cheat sheet will get you on the fast track to understanding the main features of setting up your account. We will review creating groups, user-defined fields and importing your contacts into your CRM.

[Home](#)[Contacts](#)[Communicate](#)[Automation](#)[Calendar](#)[Apps](#)[Website](#)[Media Library](#)[Settings](#)[Help](#)[Logout](#)

*Remember, if you ever need support click on “**Help**” in the top navigation bar to access our Help Center. We have searchable content, videos, and a ticketing form all designed to assist you with any questions you may have.*

TIME TO GET ORGANIZED!

Follow these steps to ensure a smooth implementation of your new account.

1. Determine and create your Groups to house your contacts
2. Determine and create the User-Defined Fields for your contacts
3. Gather all of your contacts into an Excel spreadsheet and import them into your account

Groups



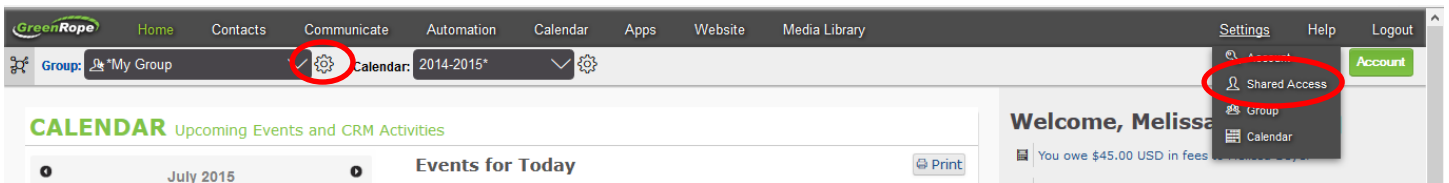
Groups are the first level of organization for your contacts and can be organized in various ways.

When identifying what groups you are going to create, keep in mind some of these group-specific features:

- *Shared access permission* is given to contacts on a group basis (this allows other people to have access to your account and your groups)
- Custom content can be developed and distributed to all group members
- *Events* can be created for the contacts of the specific group
- *Drip campaigns*, or automated series of emails, can be triggered by someone joining the group
- *Workflows*, or a series of CRM activities, can be manually triggered by a shared access user or automatically triggered when someone joins the group
- *Websites* can be built for each group

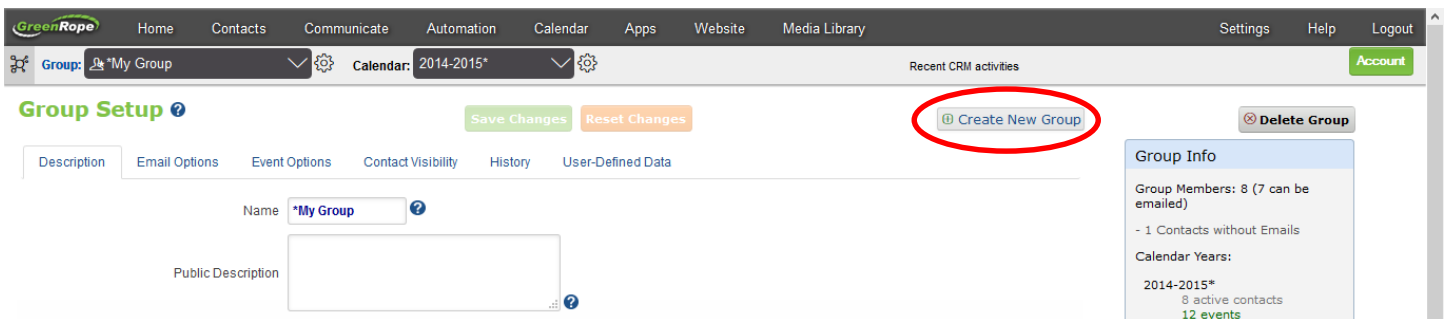
Creating a Group:

In the top navigation bar, place your cursor over the **"Settings"** icon > select the **"Group"** option. This will open up your **'Group Setup'** section.

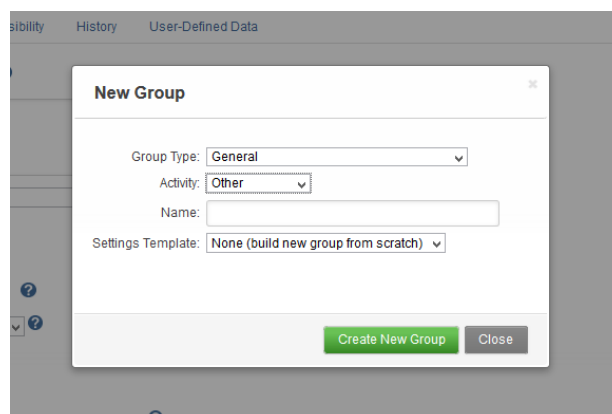


You can also access the **'Group Setup'** section by clicking on the gear icon next to the group drop-down menu on the top left-hand side of your account.

To create a new group, click on the **'Create New Group'** button.



This will open up the **'New Group'** window where you can set up your new group. The **Activity** dropdown menu helps you determine what type of contacts you want your group to contain.



User-Defined Fields



The second level of organization for the contacts in your account are user-defined data fields. User-defined data fields allow you to store custom data about your contacts. The custom user-defined data fields you create can be available to a specific group in your account or shared across all of your groups.

Custom user-defined data fields can be created to:

- Know/track additional information about your contacts
- Import custom fields that are not in the system
- Ask a contact to fill out information on a public-facing form (i.e. a signup form on your website or a public ticketing form).

To create a new field, click on the **'User-Defined Data'** tab in the **'Group Setup'**.

Click on the **'Add New Custom Field'** button.

Create and edit your User-Defined Data Field

Select your type of user-defined field:
Select One, Select Multiple, Trend Data, Integer, Date, Open Text, and Short Text

The screenshot shows the 'Add New Custom Field' form. A red arrow points to the 'Field Name' input field. Another red arrow points to the 'Type' dropdown menu, which is set to 'Select One'. A third red arrow points to the 'Show in contacts list' checkbox, which is currently unchecked.

This will be the name of the field. If the field is being used in a signup form or ticket form, this will be what the contact will see.

If you would like for the field to appear in the main 'Contacts' section in the list view, check this box.

If your field has values that will be pre-defined ('Select One' or 'Select Multiple'), place those values in this open text box separated by a comma and a space.

The screenshot shows the 'Add New Custom Field' form. A red arrow points to the 'Field Name' input field. Another red arrow points to the 'Type' dropdown menu, which is set to 'Select One'. A third red arrow points to the 'Also store Company data' checkbox, which is currently unchecked.

The field you are creating will default to only be made available to the group you are in (the group that shows in the drop-down menu on the top left-hand side of your account). If you would like the field to be shared across all of your groups, change this setting from 'This Group Only' to 'All Groups'.

If you would like this field to be included on a company record, check this box.

Delete your user-defined fields by unchecking the box next to the field name and saving your changes.

[+ Add New Custom Field](#)

☒ Field Name: Type: ☐ Show in contacts list

Sharing: ☐ Also store Company data

Contacts' access to this data: Shared Access users access:

User Field Description:

Change the visibility of system-generated fields and user-defined fields:

You can choose which fields (system-generated and user-defined fields) you display in the contacts record by clicking on the **“Contacts”** header within the navigation bar above and select the **“Visibility”** tab. This area controls how you display data when you view a contact's record.

GreenRope

Home **Contacts** Communicate Automation Calendar Apps Website Media Library Settings Help Logout

Group: My Group Calendar: 2014-2015 Account

Your Contacts and Customer Relationship Management (CRM) System ?

Contacts Reports CRM Activities Hot Cold Opportunities Companies Import Export **Visibility** Research Tools

Contact Display Options ?

Save Changes Reset

Drag and drop fields where you want them

Email

Firstname

Lastname

Title

Picture

Phone

Mobile

Fax

Tags

Positions

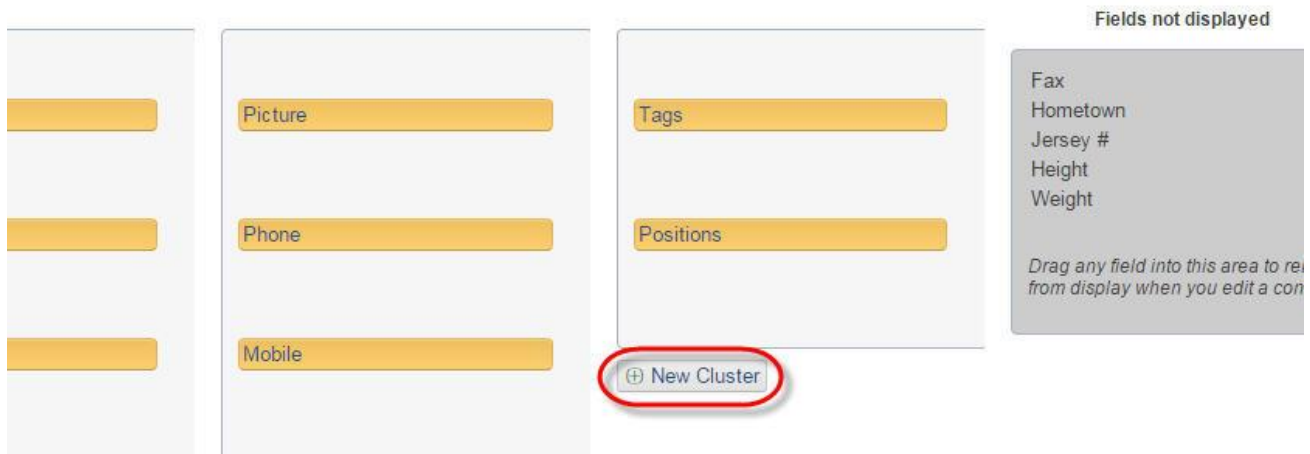
New Cluster

Fields not displayed

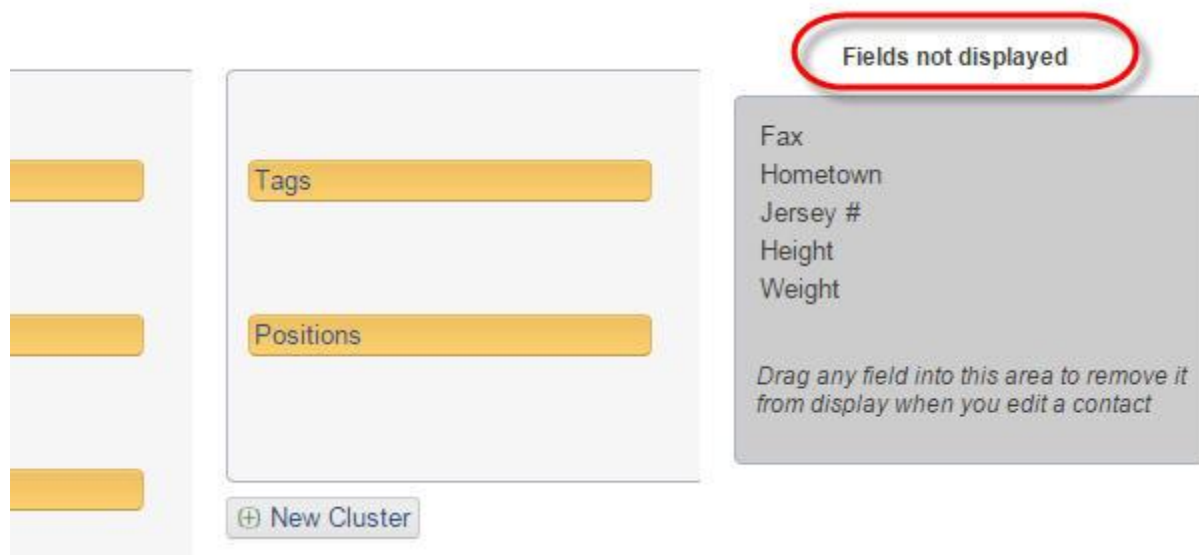
Gender
Birthdate
User14 (*My Group: Lease Amount)
User8 (*My Group: Testfield)
Hometown
Jersey #
Height
Weight
Skills / Interests
Bio

Drag any field into this area to remove it from display when you edit a contact

You can rearrange the fields by dragging and dropping. Each grouping of fields is known as a "**cluster**" and you can create new ones by clicking on the '**New Cluster**' button.



To remove a field from the contact records view, simply drag it to the right hand side under the '**Fields Not Displayed**' section.



By moving a field to this area, it is only hiding the field from the contact record view. It will not delete any information you may have in those fields and can always be dragged and dropped back into a '**Cluster**' later on.

Importing

Once you have created your groups and your custom user-defined fields, you are ready to import in your contact information.

The easiest way to create a large amount of contacts in your account is to import them into your account with a **comma or tab delimited file (CSV)**. The spreadsheet will contain the contact information you would like to bring over, including system generated fields (like first name, email address, phone) and the custom fields you have created.

Organizing Your Spreadsheet

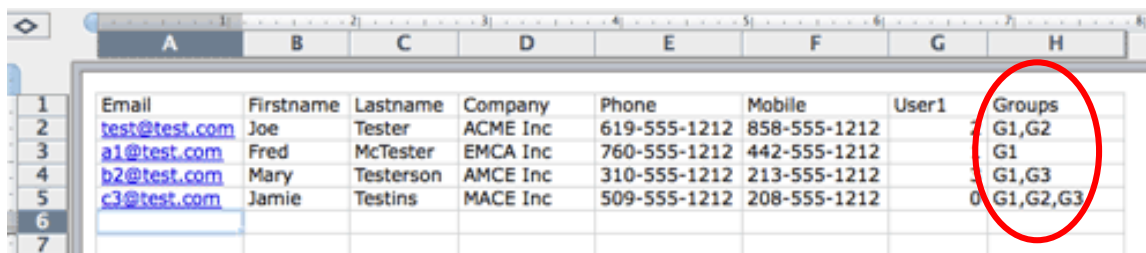
The screenshot below is a good example of what a properly formatted file would look like in a spreadsheet. You will separate your contact data into columns with appropriate headings (example Firstname, Lastname, Company, etc.)



Create a column for each user-defined field that you have created in your account and assign the appropriate value to your contacts. In the spreadsheet example below, the column called '**User 1**' is an example of a custom user-defined field. The values associated to each contact under the '**User 1**' column are what the system will populate during the import. **It is very important that you align/match what you have in the system exactly within the 'Header Selection' during the import process or else the information won't populate within your account.**

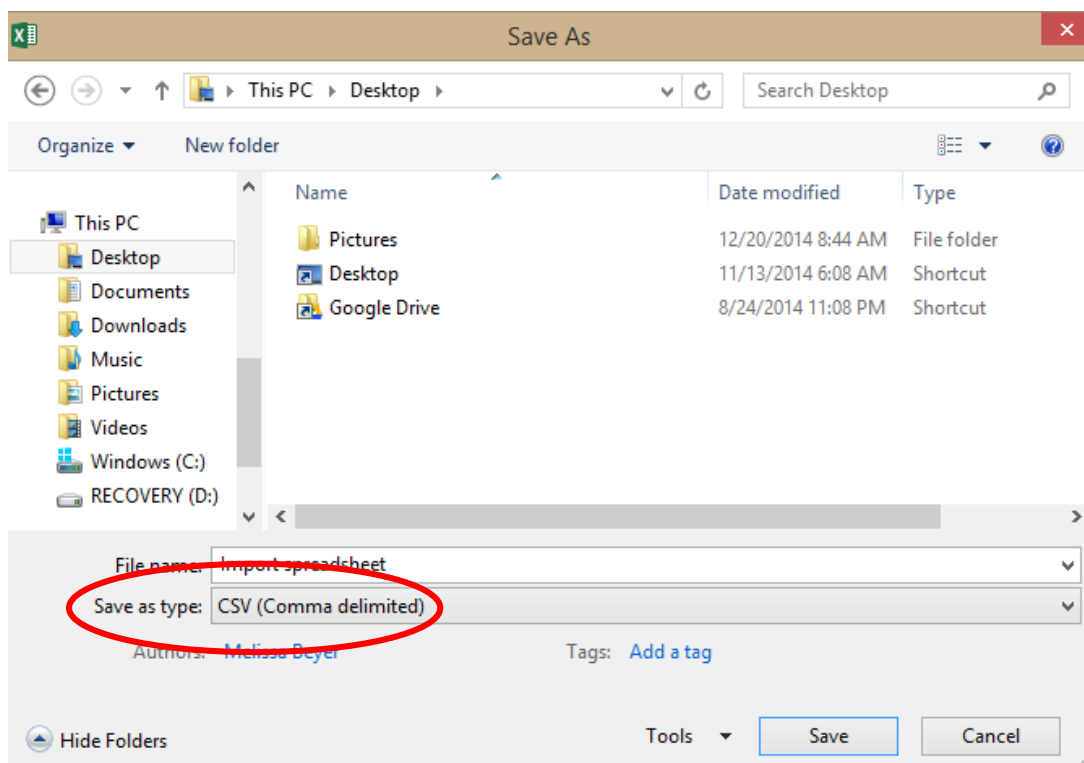
	A	B	C	D	E	F	G	H
1	Email	Firstname	Lastname	Company	Phone	Mobile	User1	Groups
2	test@test.com	Joe	Tester	ACME Inc	619-555-1212	858-555-1212	2	G1,G2
3	a1@test.com	Fred	McTester	EMCA Inc	760-555-1212	442-555-1212	1	G1
4	b2@test.com	Mary	Testerson	AMCE Inc	310-555-1212	213-555-1212	3	G1,G3
5	c3@test.com	Jamie	Testins	MACE Inc	509-555-1212	208-555-1212	0	G1,G2,G3
6								
7								

If you would like to import contacts into multiple groups at once, create a column called '**Groups**' and assign the appropriate groups to your contacts. In the spreadsheet example below, the column called '**Groups**' is an example of how you can import one contact into multiple groups within your account (versus having the system only import them into the group you are currently in as seen in the drop-down menu on the left-hand side of your account). If you want the system to import the contact into more than one group, you will separate the group names by a comma (no space) and they need to match the exact group name in your account. **It is very important that the values match what you have in the system exactly or else it won't populate.**



	A	B	C	D	E	F	G	H
1	Email	Firstname	Lastname	Company	Phone	Mobile	User1	Groups
2	test@test.com	Joe	Tester	ACME Inc	619-555-1212	858-555-1212		G1,G2
3	a1@test.com	Fred	McTester	EMCA Inc	760-555-1212	442-555-1212		G1
4	b2@test.com	Mary	Testerson	AMCE Inc	310-555-1212	213-555-1212		G1,G3
5	c3@test.com	Jamie	Testins	MACE Inc	509-555-1212	208-555-1212		G1,G2,G3
6								
7								

Note: It is important to save your spreadsheet as a **Comma Separated Value (.CSV)** file before you import it into your CRM.



Importing your contacts:

During the import process, we will run a **duplication check** on the contacts you are importing in and the contacts that are currently in your account. The contact's email address is used as the unique identifier for each contact. If the email address is the same, we will know that the contacts are the same person. If we can't identify the contact as the same person based on the email address, de-duplication is done on the following field combinations (in order of priority):

Name + Phone

Name + Address

Name + Mobile

Name + Company

Note: If you want your contacts to de-duplicate properly then please ensure that each line of your import contains at least one of the above field combinations.

You can import your contact by

1. Uploading your .CSV file by going to '**Contacts > Import**' tab and clicking '**Upload File**'

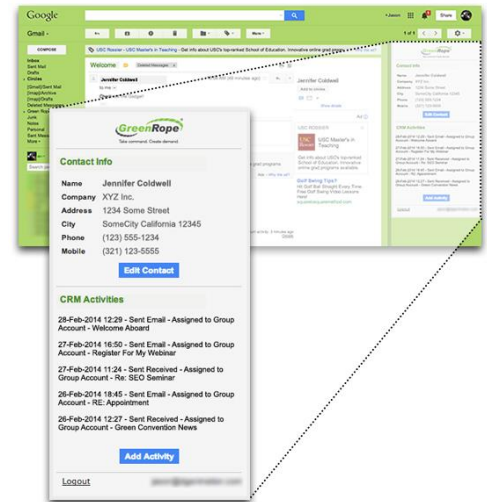
The screenshot shows the GreenRope CRM System interface. The top navigation bar includes 'Home', 'Contacts' (highlighted with a red circle), 'Communicate', 'Automation', 'Calendar', 'Apps', 'Website', 'Media Library', 'Settings', 'Help', and 'Logout'. Below this, a secondary bar shows 'Group: My Group' and 'Calendar: 2014-2015*'. The main navigation bar includes 'Contacts', 'Reports', 'CRM Activities', 'Hot', 'Cold', 'Opportunities', 'Companies', 'Import' (highlighted with a red circle), 'Export', 'Visibility', 'Research', and 'Tools'. Under the 'Import' tab, there is a sub-menu with 'File', 'Text', 'CSV', 'Yahoo!', 'Gmail', 'e-economic', 'GotoMeeting', 'QuickBooks', 'Magento', 'Evernote', 'Suppression List', and 'CRM Import'. The 'File Upload' section is active, showing 'Import Contacts by File Upload'. It includes instructions on file formats (CSV, Excel) and a list of valid headers. Below this, there is a section for 'Uploaded files' and a 'Summary' box indicating 0 files imported. At the bottom, there is a red circle around the 'Upload new file:' section, which contains an 'Upload File' button.

2. Or you can download from your email accounts by going to the specific email tabs

The screenshot shows the GreenRope CRM System interface with the 'Import' tab selected. The sub-menu includes 'File Upload', 'Text', 'CSV', 'Yahoo!' (highlighted with a red circle), 'Gmail' (highlighted with a red circle), 'e-economic', 'GotoMeeting', 'QuickBooks', 'Magento', and 'Suppression List'. Red arrows point from the 'Yahoo!' and 'Gmail' tabs to their respective import pages. The 'Yahoo!' page is titled 'Import Contacts from Yahoo!' and features a 'Connect to Yahoo!' button and an 'Import Contacts from Yahoo!' button. The 'Gmail' page is titled 'Import Contacts from Gmail' and features a 'Connect to Gmail' button and an 'Import Contacts from Gmail' button.

The Gmail Gadget is an extension that you can use while working in Gmail to view a contact's information as well as their CRM activity. With the Gmail Gadget you will be able to:

- Pulls up all CRM Activities with that contact
- Add new CRM activities and engagements
- Add a new contact to your GreenRope CRM right from Gmail
- View contact information and details
- Edit your contact's information



Get the GreenRope Gmail Gadget from the Chrome Web Store!

Questions? Take advantage of our live customer support! We are available 24/7 to help answer any and all questions you have. Simply click on the **Help** button!

