ACCOUNT SETUP

Cheat Sheet

Overview

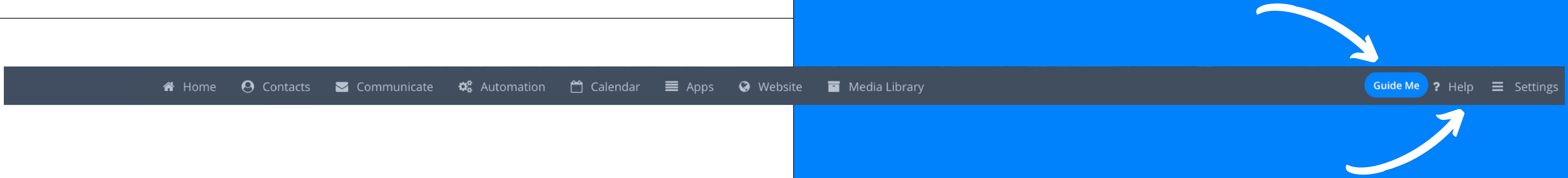
This cheat sheet will get you on the fast track to understanding the main features included when setting up your account. We will review creating groups, user-defined fields, shared access, and importing contact lists into your CRM.

Remember, if you ever need support, click on “Guide Me” or "Help" in the top navigation bar to access our interactive tutorials and extensive Help Center.

TIME TO GET ORGANIZED!

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

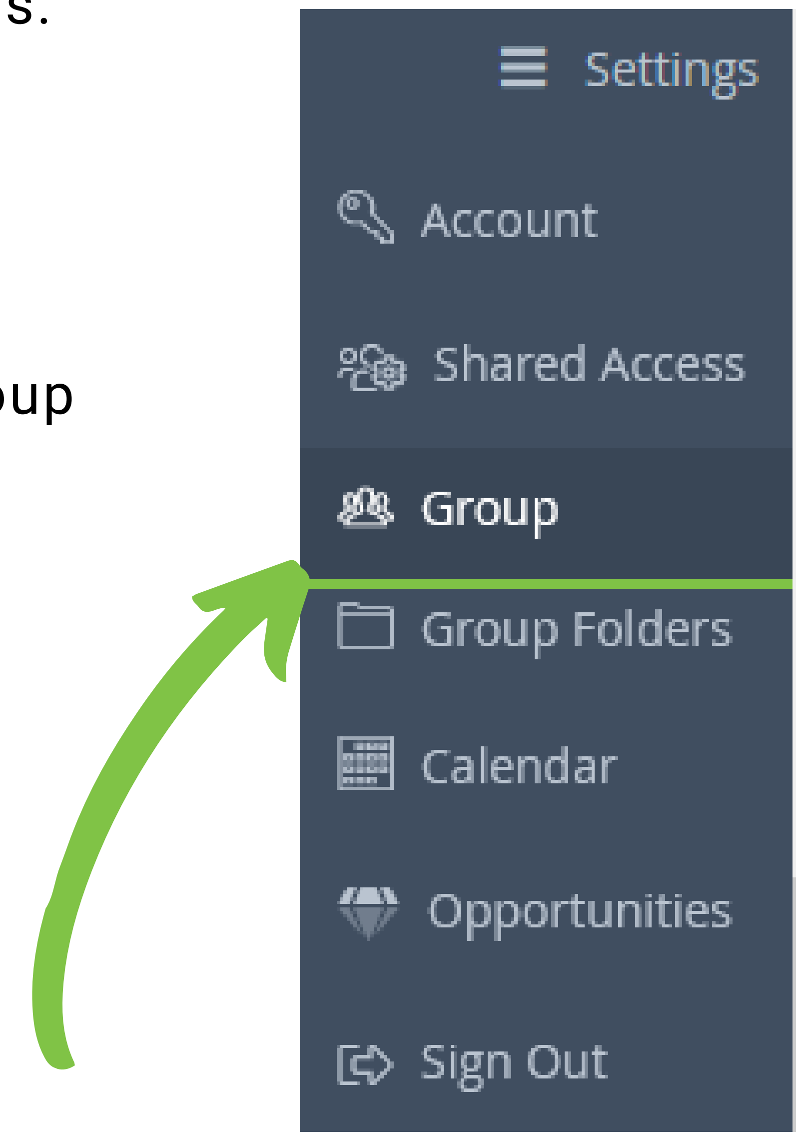
1. Create unlimited **Groups** to house your contacts
2. Grant **shared access** permissions to other users
3. Create custom **User-Defined Fields** for your contacts
4. **Import** your contact lists into your account
5. **Integrate** your account with Zapier & more



Creating Groups

Groups are the first level of organization for your contacts and can be organized in various ways. When identifying your group needs, keep in mind some of these group-specific features:

- Shared access permissions are given to contacts on a group basis
- Custom content can be developed and distributed to all group members
- Events are created for specific groups
- 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 or automatically triggered when someone joins a group
- Websites can be built for each group



Creating a New Group

STEP 1

In the top navigation bar, place your cursor over Settings and select the "Group" option from the drop down. This will open your Group Settings page.

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

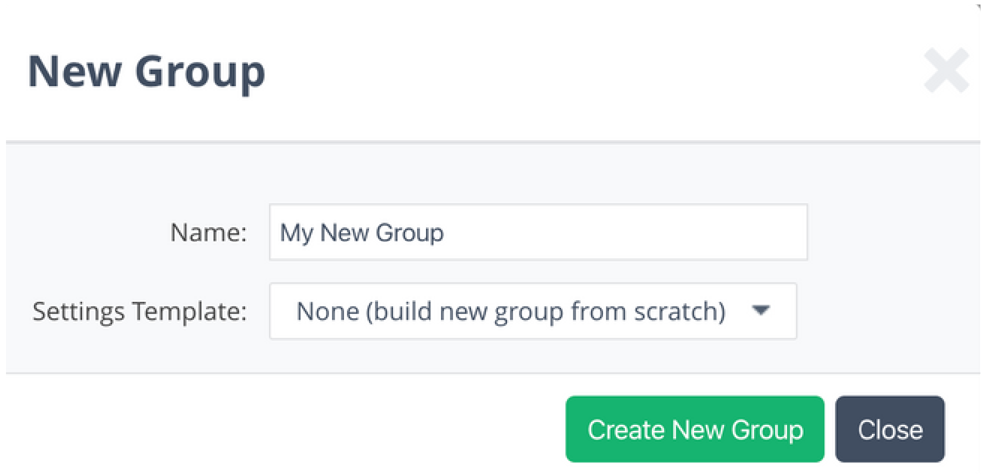
Creating Groups (continued)

STEP 2

From the Group Settings page, click on the New Group button.

STEP 3

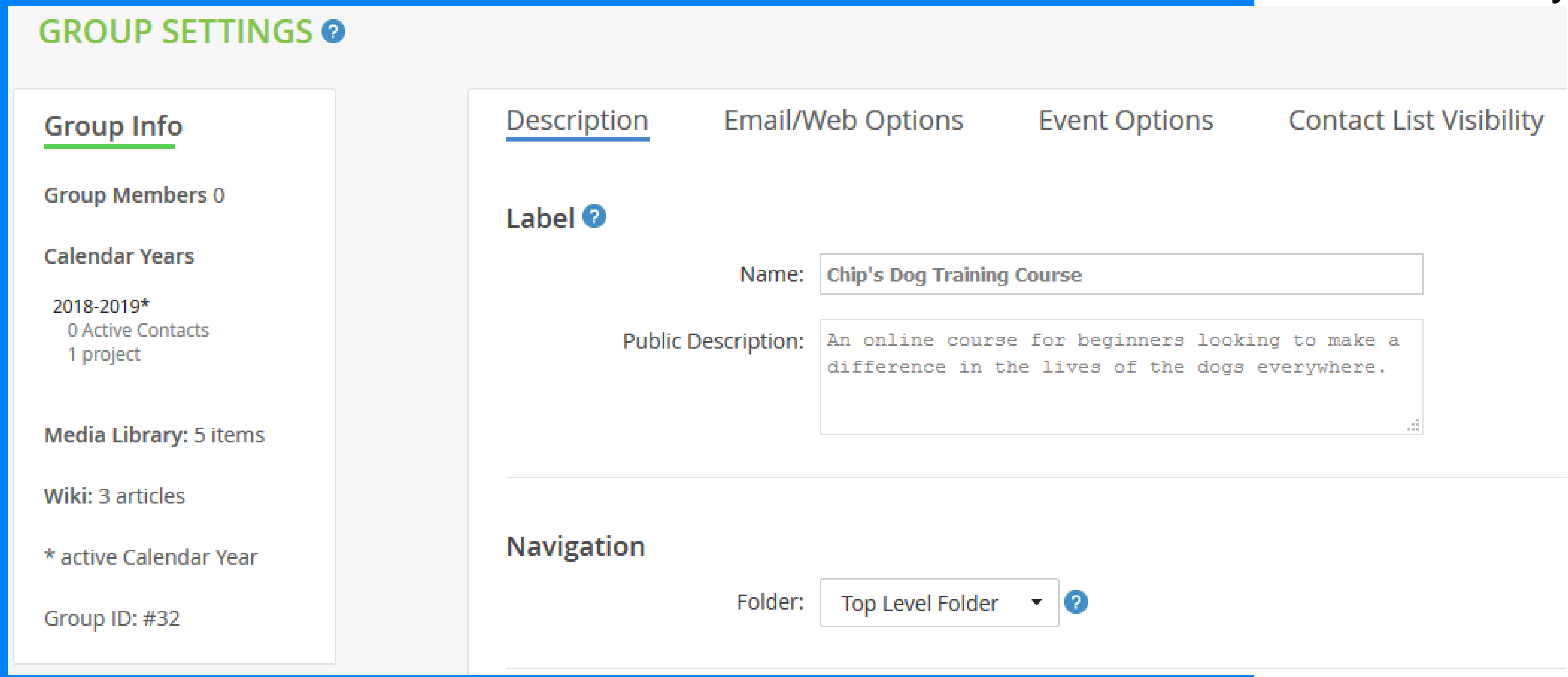
Define the new group name and if you want to create it based it on a previous group template.



STEP 4

Once you click the "Create New Group" button the page will load the Group Settings page where you can customize your group.

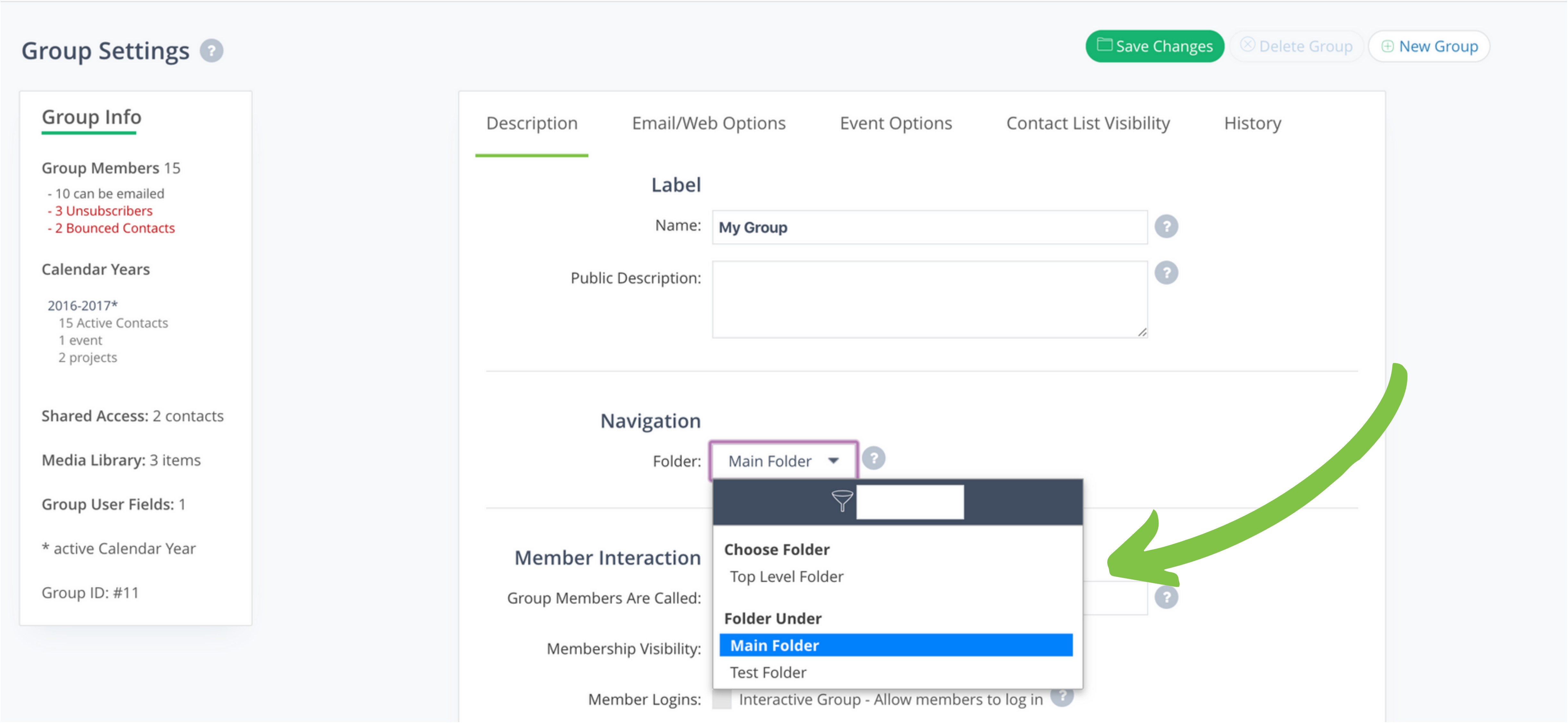
Setup email, web, and event options, customize how contacts are viewed under Contact List Visibility, and view your group's history in the History tab.



Group Folders

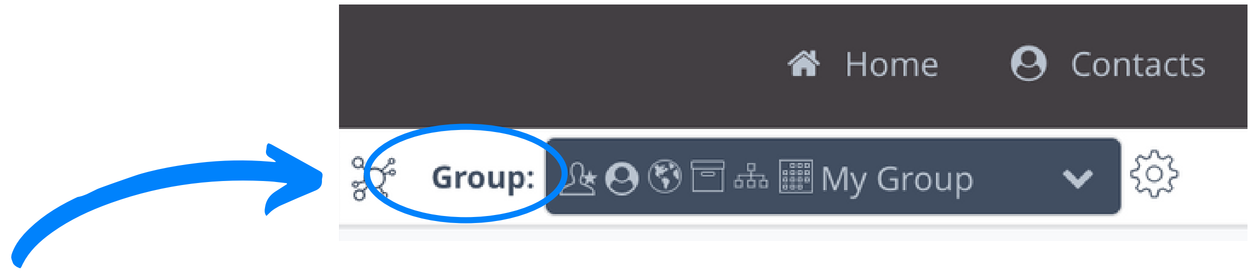
You can also add a group to a folder on the Group Settings page in the Description tab.

Hover over Settings > select Groups > select Description > under the “Navigation” section, use the field for “Folder” to select an existing folder.



Note: The folder needs to be created in the Group Management area (see the next page) in order to be included in this drop-down list. Once you have selected the folder be sure to click “Save Changes”.

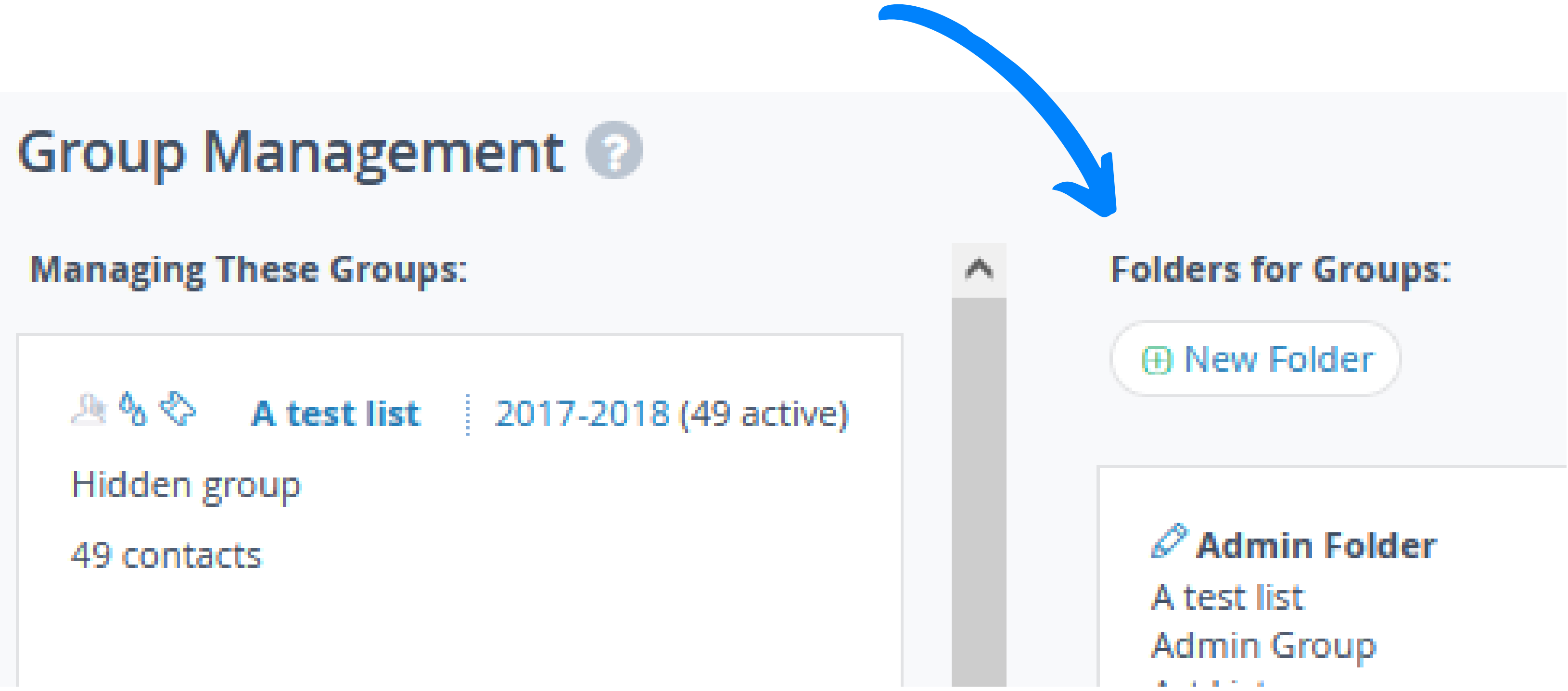
Group Folders (continued)



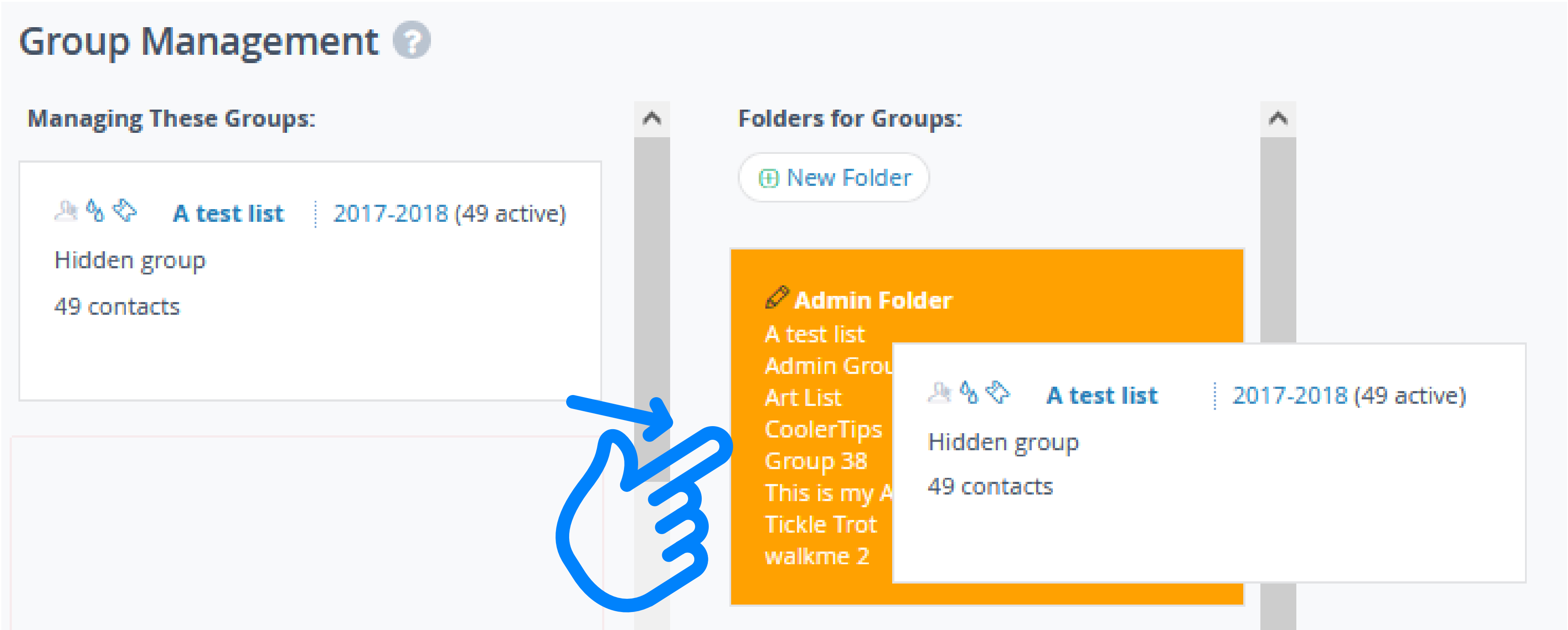
Organize your groups to increase efficiency and overall account organization.
To access the Group Management area, select the link titled “Group” (next to the group drop-down list).

To create a new folder:

Step 1 - Click the “New Folder” button and click “Save”.

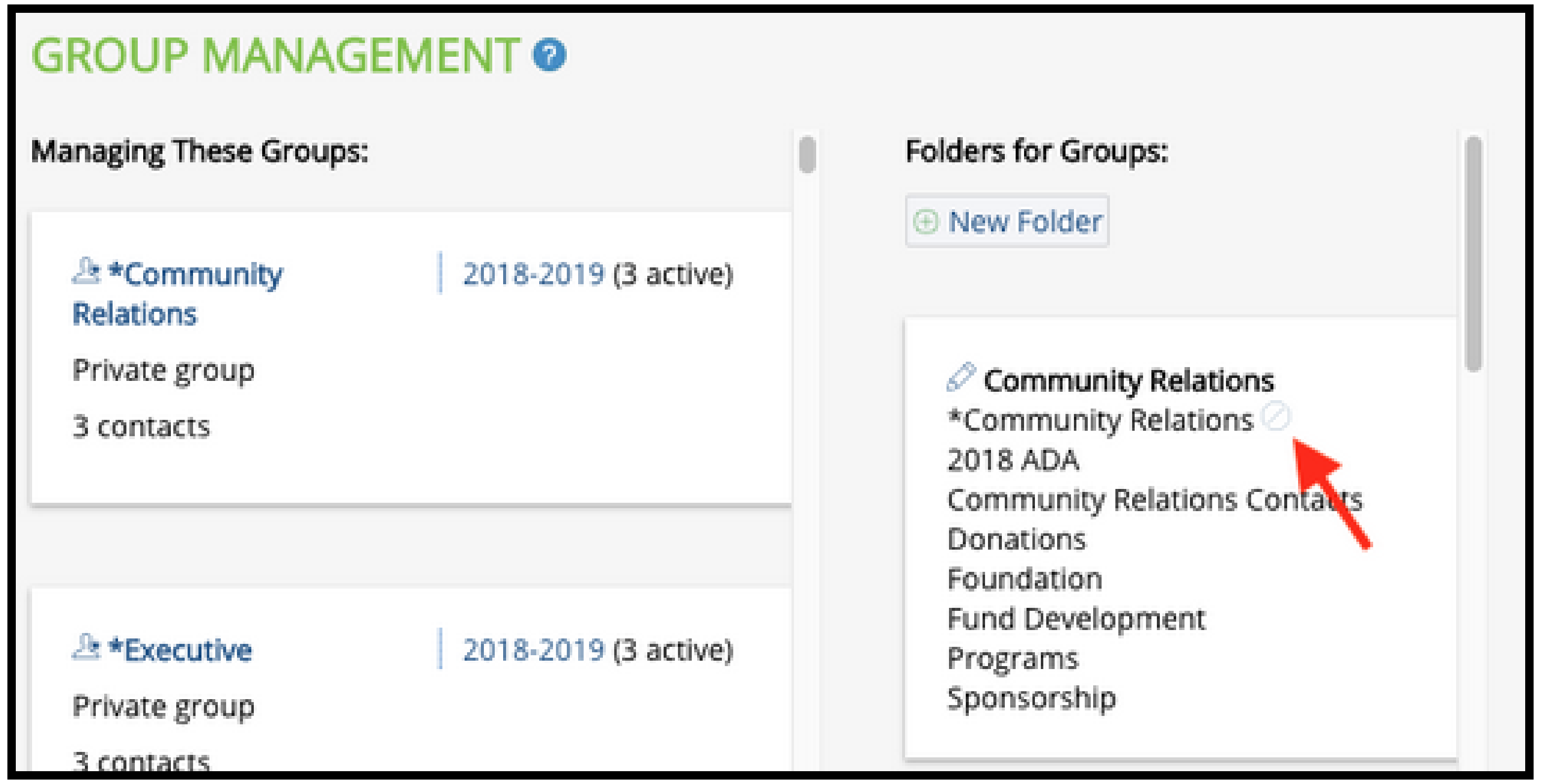


Step 2 - Drag and drop the group names you would like to be added to that folder.



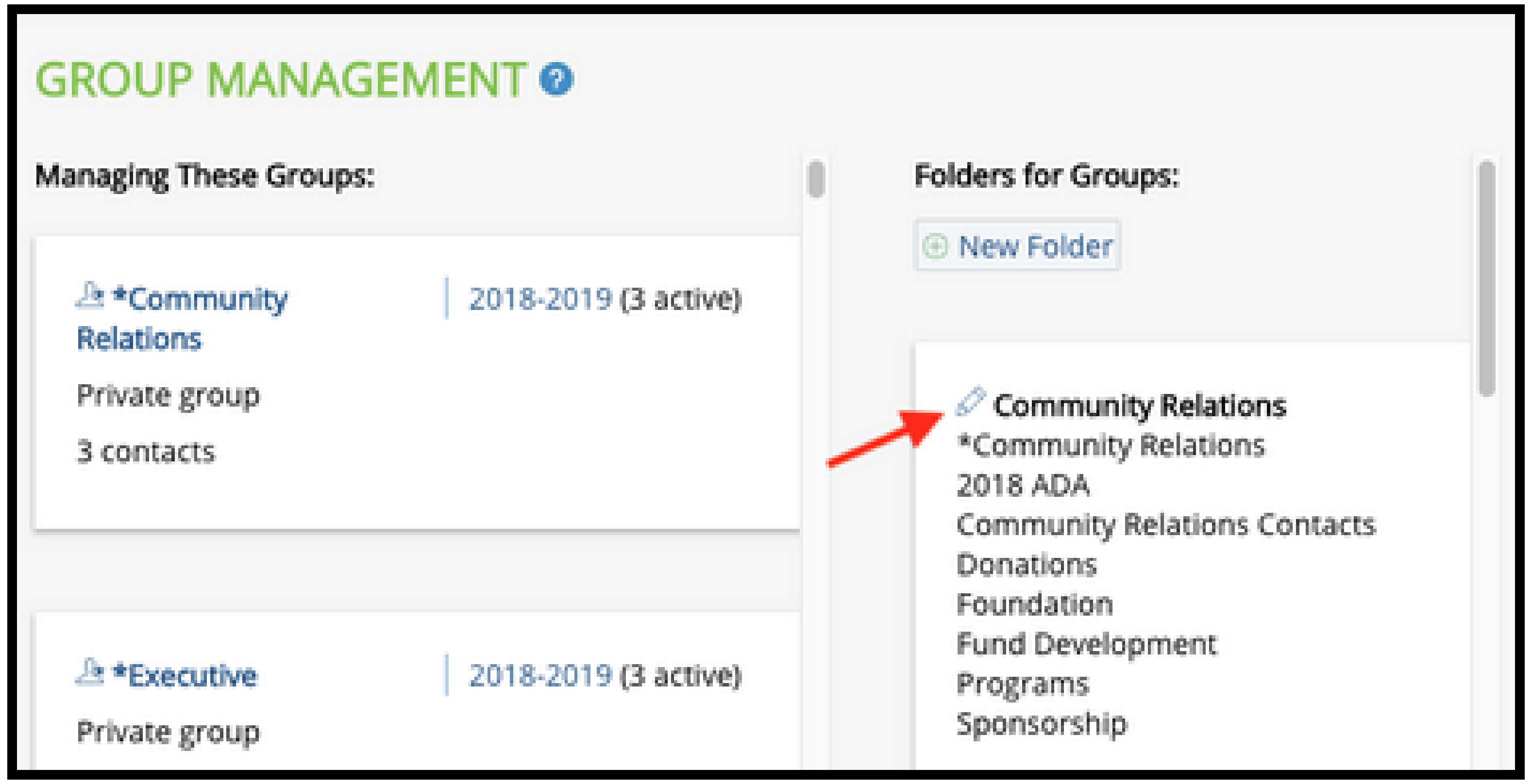
Remove a Group From a Folder

To remove a group from a folder, place your cursor to the right side of the group under your folder and click on the icon.



Editing & Deleting Folders

To edit or delete a folder, select the pencil icon shown to the right of the folder name.



Shared Access Permissions

With your account subscription comes the ability to grant access to other users. These users include Shared Access Users, Super Users, and Power Users. To grant access to any of your groups hover over Settings > select Shared Access.

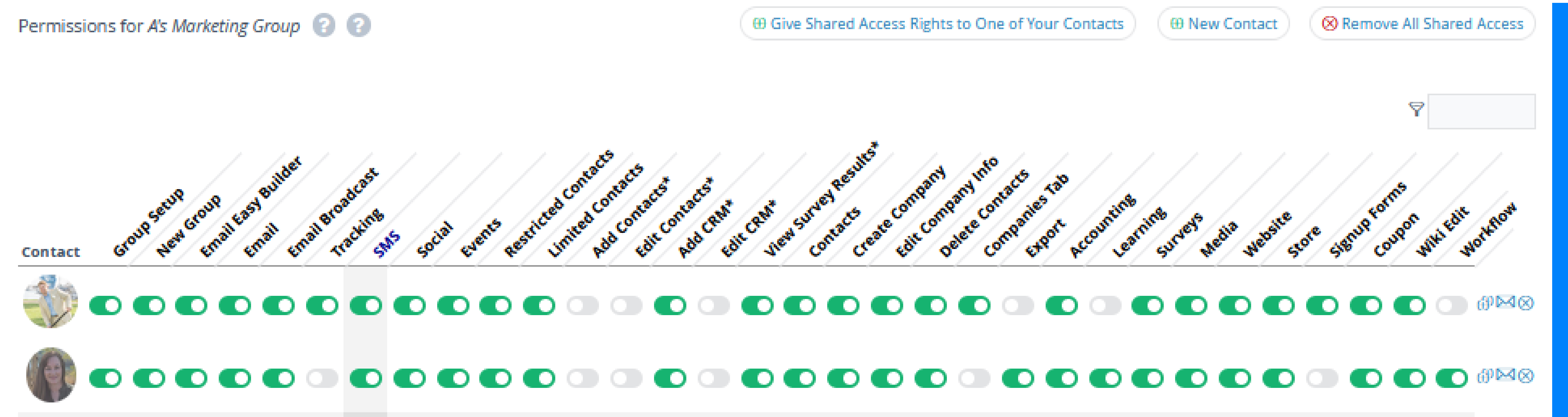
Account Owner/Admin - An account admin has complete access to the entire account without limitations. The Account Owner/Admin is the only one that can update billing, update account settings, and grant export permission.

Power Users - The Power User can perform all the primary functions of the owner/admin (less the ability to make billing updates, account setting updates, and export permission granting). A Power User can reset passwords for other Shared Access and Super Users, grant & revoke shared access permissions, update feature access, and review account Recent Actions.

Super Users - A Super User is a Shared Access User with all permissions granted, including full access to Contact Management for all groups they are a member of.

Shared Access Users - A Shared Access User is a user with select access to specific areas of the account based on permissions granted by an account Owner/Admin or Power User. Shared Access can be limited by group and feature.

Example: A sales rep can be granted access to only the group consisting of contacts that make up his/her sales territory. He/she would not be able to see any other groups unrelated to his/her sales territory.

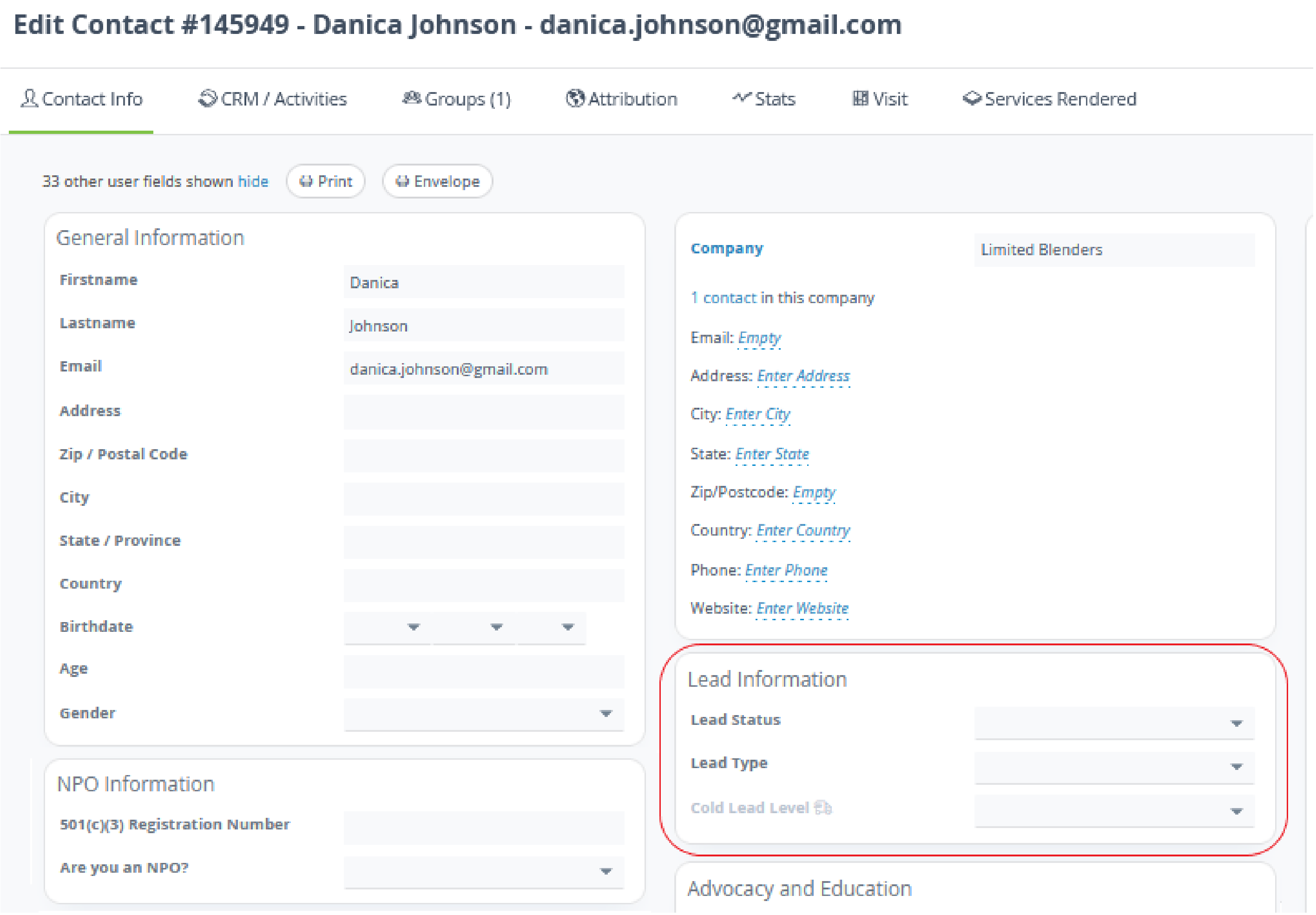


User-Defined Fields

User-defined data fields allow you to store custom data about your contacts and companies. 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.

User-Defined Fields

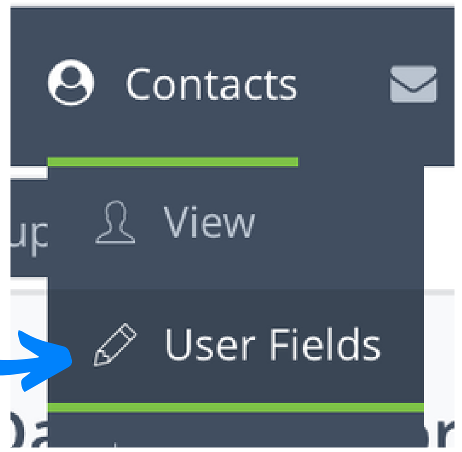
User-Defined Fields are used to house more information about your contacts, such as their account representative, anniversary date, service level. The custom field title options are limitless.



When creating a user field decide what type of field it will be:

- Select One - the field can only be set to one value
- Select Multiple - a checkbox to include multiple values
- Trend Data - use data tied to dates to track changes over time
- Integer - includes whole numbers, forcing anything that isn't a number to be filtered out
- Date - this date is stored using the YYYYMMDD format and offers a UI date picker dialog
- Open Text - store any detailed information about the contact
- Short Text - stores a one-line data entry field

To create new custom User-Defined Fields, hover over the Contacts drop-down and click User Fields. Next, select "Add New Custom Field", or click to edit any existing field already created.



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 so this is to import them into your account with a comma or tab delimited file (CSV). The spreadsheet will contain all the contact information you want to store in your account such as first name, email, address, phone, and the custom fields you have created.

Setting Up Your File

Now that your account is set-up, start the import process by going to “Contacts” > “Import”. There are various ways you can import your contacts.

Spreadsheet Configuration

Uploading contacts from a file is straightforward. This is best done by starting from a spreadsheet program, such as Excel. The example shows what a properly formatted file should look like in a spreadsheet.

	A	B	C	D	E	F	G	H	I	J	K
1	Email	Firstname	Lastname	Company	Phone	Mobile	User 70 Lead Source	User 71 Sales Representative	User 72 Service Preferences	Groups	Tags
2	Susanjane@gmail.com	Susan	Jane	The One Club	888-362-5582	951-6783372	TradeShow	John	Service A	TradeShow, New Leads	TradeShow
3	Dawnsmith@yahoo.com	Dawn	Smith	Dawn Consulting	760-994-8327	760-993-8283	TradeShow	Amber	Service A,Service B	TradeShow, New Leads	TradeShow
4	Jakeparker@outlook.con	Jake	Parker	Verizon	894-992-5505	858-003-0921	TradeShow	John	Service C	TradeShow, New Leads	TradeShow
5	Dunnedwards@unionbank.com	Dunn	Edwards	Union Bank	858-990-0087	858-789-0123	TradeShow	John	Service A,Service B	TradeShow, New Leads	TradeShow
6	Kevinjames@kgp.com	Kevin	James	KGP	886-090-2391	760-092-1287	TradeShow	Amber	Service A,Service C	TradeShow, New Leads	TradeShow
7	Linseyhemming@fox.net	Linsey	Hemming	Fox Sports	858-332-0906	760-321-0023	TradeShow	Amber	Service C	TradeShow, New Leads	TradeShow
8	PaulPederson@pdj.com	Paul	Paederson	PDJ	760-229-1254	858-353-5553	TradeShow	Kyle	Service A,Service B	TradeShow, New Leads	TradeShow
9											

In the example, you can see the different column titles. "Email" is a mandatory field, acting as the contact identifier. The "Groups" column, an optional column, allows you to place contacts into several groups. If you omit the "Groups" column, the contacts will be added to the current group selected in the navigation at the top of the screen. The "Tags" and "Groups" fields can contain multiple values separated by commas.

Having a header row can speed up the import process as the system will detect where the content of each column will be placed in your CRM. Use "unused" to skip an unwanted field from being imported. Each header can only be used once in each import.

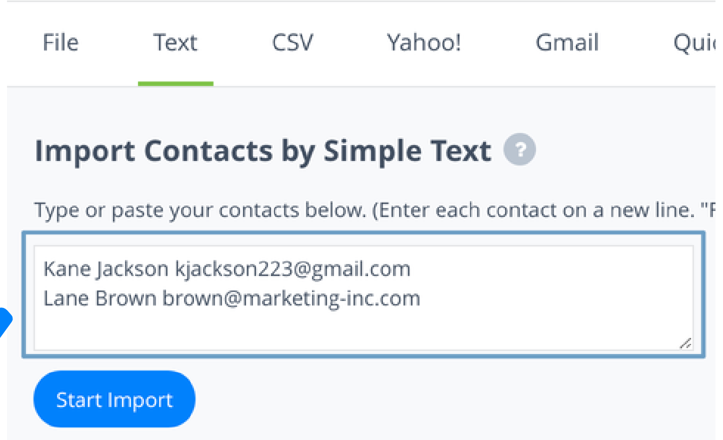
Once you have created your import file, save it as a Text (CSV) or Text (Tab-Delimited).

Importing Your File

You have the option to import your contacts with either simple import methods or a file upload. The simple import methods include minimal data while the file upload allows for extensive data importing.

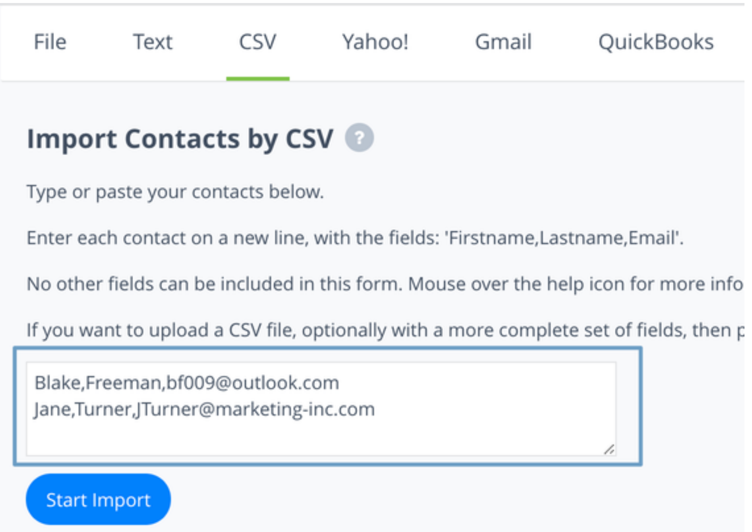
Import Contacts by Simple Text

Use the "Text" area to import your contacts via the text box. Each row represents a contact, and each field associated with the contact must be delimited, or separated by a space.
Example: Firstname Lastname Email



Import Contacts by CSV

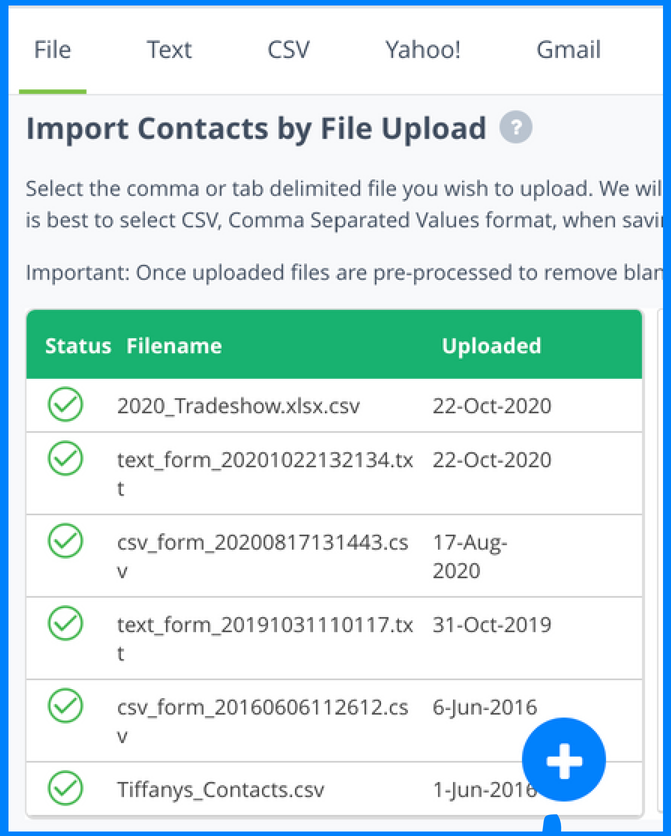
Use the "CSV" tab to import your contacts in the same fashion as the "Text" process, the difference is how the content is formatted.
Here, each field associated with the contact must be delimited, or separated, by a comma.
Example: Firstname,Lastname,Email

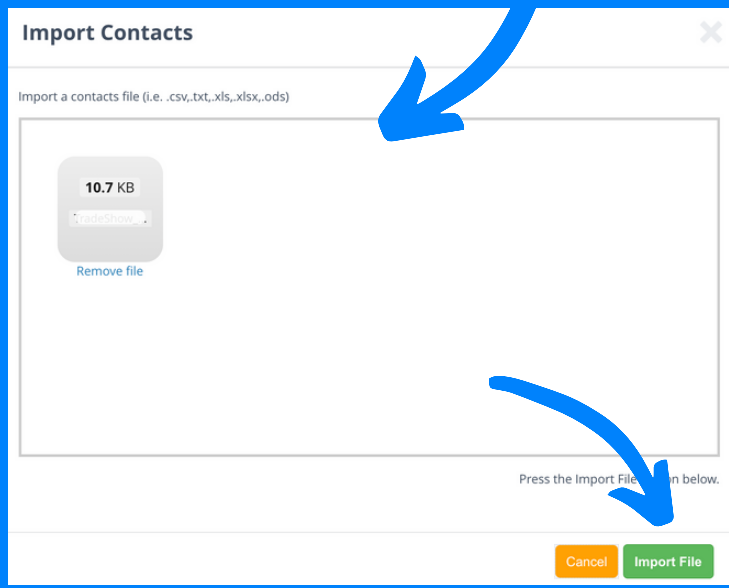


Import Contacts by File Upload

In the File tab of your Contact Import screen, scroll to the bottom and click on the blue “Quick Add” button to add a new file.

Drag and drop a file from your desktop to import or click on the box to pick a file from your computer (import one file at a time). You can upload files with .xls, .xlsx, .ods, or preferably .txt or .csv. extensions.

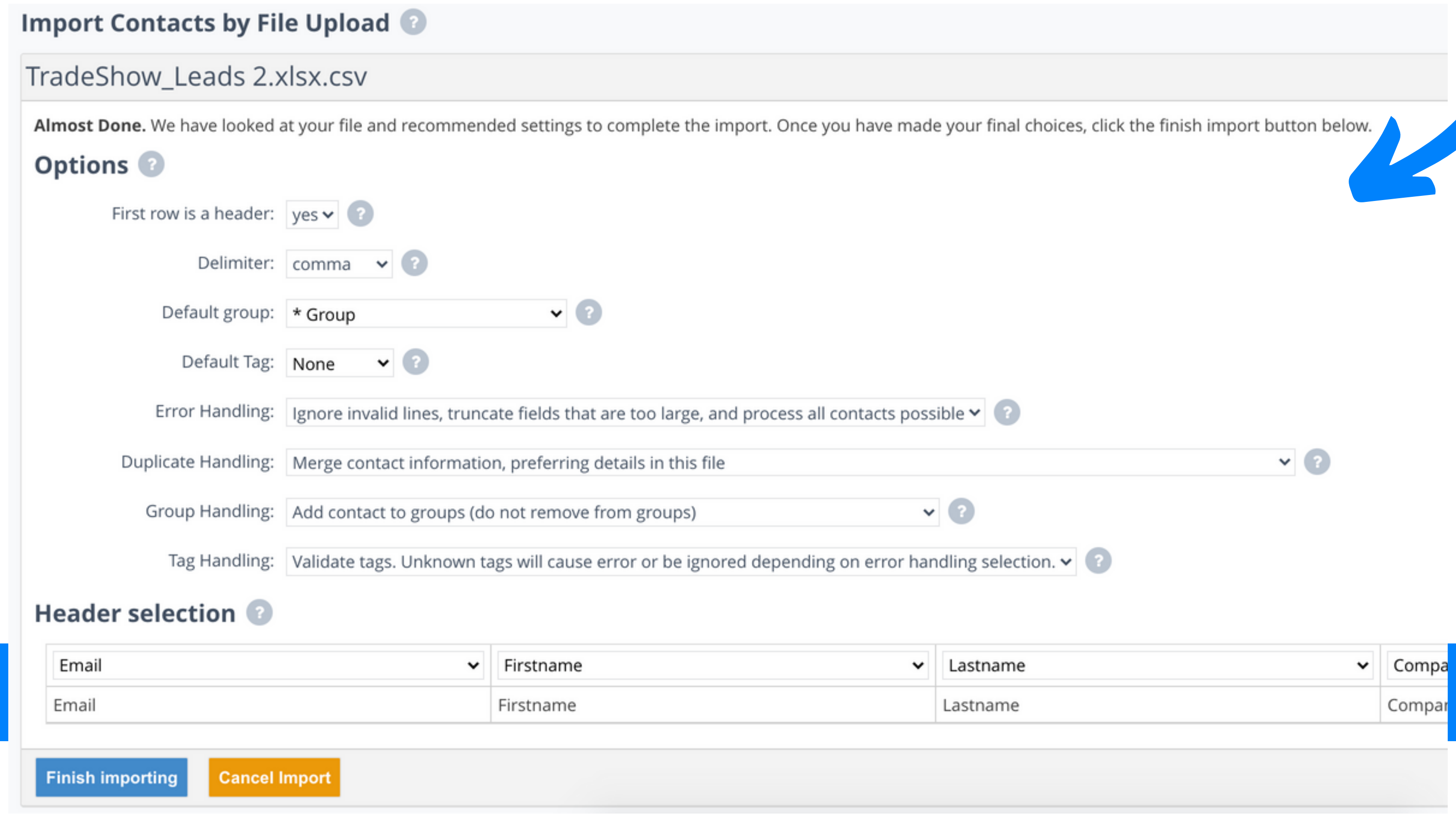


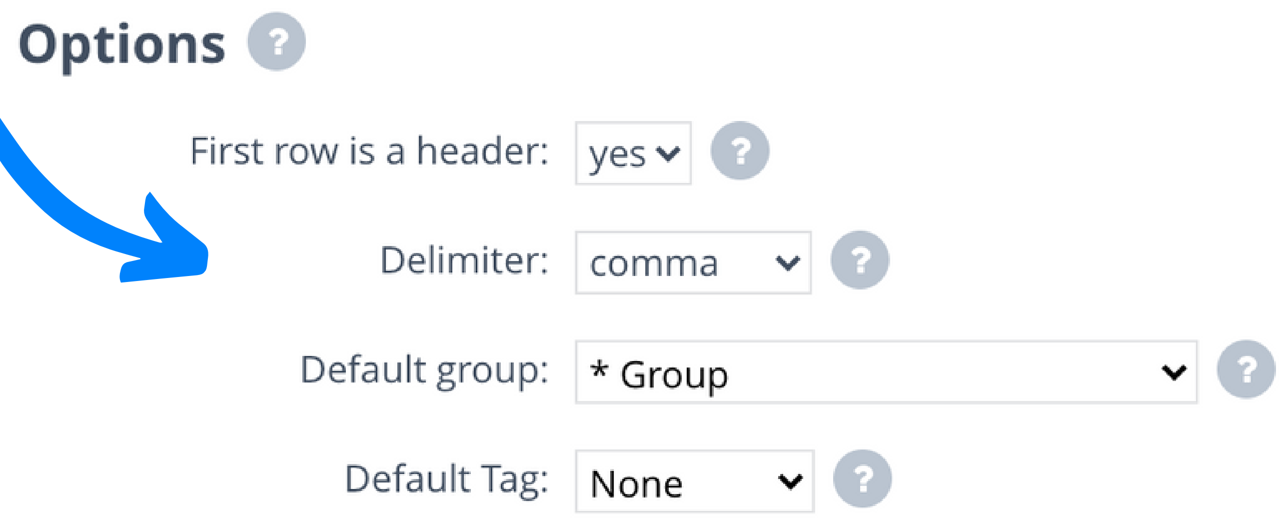


Updating File Preferences

Once the file has been added, a secondary Options page will pop-up to define your importing preferences before upload. It is important to review the options to make sure the settings reflect your file.

Confirm the type of delimiter you're using in the file. For example, for a CSV import, you'll use the comma separated values. You can also assign a default tag and/or group to this list of contacts.

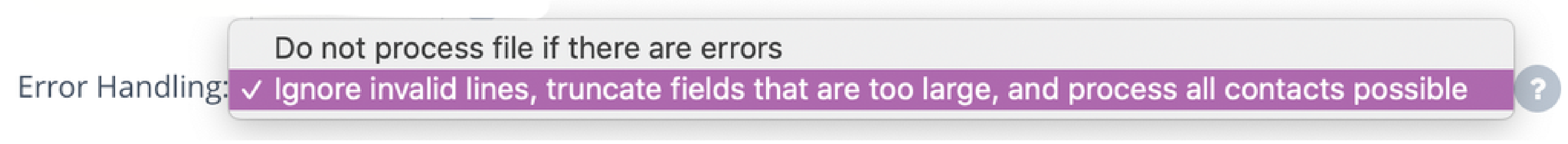




Updating File Preferences (continued)

Error Handling:

It is recommended that you import the file with the option "Do not process file if there are errors." The report will let you know if errors occurred, allowing you to correct them and re-upload the file.

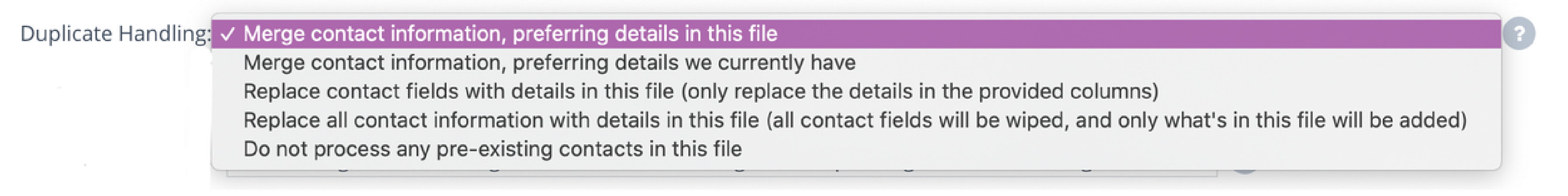


If the import file is very large you can use the "Ignore invalid lines, truncate fields that are too large, and process all contacts possible" option, which will do what it can to correct or ignore lines with errors and continue to import.

If the import is still not successful with this option selected, the errors in the file are fatal and will need to be corrected before the import can be complete.

Duplicate Handling:

By default, information within the database and file for duplicate contacts is merged, preferring information from the file.



Note - De-duplication is done on the following field combinations (in order of priority),if you want your contacts to de-duplicate properly please be sure each line of your import file contains at least one of the below field combinations:

- email
- name + phone
- name + address
- name + mobile
- name + company

You can add user-defined data fields to this de-duplication process for your contacts on the Group Settings page.

Imported File Overview

The newly imported file is now listed in the file import area along the left. You will see the status of your imports, file names, and when they were uploaded. To remove a file, hover over it and click on the delete icon. Otherwise, click on the file to generate the import report.

Status	Filename	Uploaded
	2020_Tradeshow.xlsx.csv	22-Oct-2020
	text_form_20201022132134.txt	22-Oct-2020
	csv_form_20200817131443.csv	17-Aug-2020
	text_form_20191031110117.txt	31-Oct-2019
	csv_form_20160606112612.csv	6-Jun-2016
	Tiffanys_Contacts.csv	1-Jun-2016

Downloading File or Report

Each imported file will generate a reporting page with more details about the contacts that were added to your CRM. Click to download the original file as well as download this .csv importing report.

2020_Tradeshow.xlsx.csv

The file imported 6 contacts successfully, on Thu Oct 22 2020 at 1:32pm.

Merged "Duplicate" Contacts

The merge report shows you if anyone in your import list was already in your account and what information was merged into their existing CRM record.

The file contained 1 duplicate contacts, including:

Line No	Action	Email	Firstname	Lastname	Company	Phone	Mobile	All Groups-Date Acquired	All Groups-Lead Source	All Groups-Account Representative	All Groups-Service Preferences	Groups	Tags
3	Merged	dawnsmith@yahoo.com	Dawn	Smith	Dawn Consulting	+17609948327	+17609938283	20201020	TradeShow	Amber	Service A,Service B	Trade Show,New Leads	TS

New Contacts Imported

The import report provides a list of the new contacts added to your CRM through the file import. If the file contained any issues while being imported, hover over the warnings in the table for more information. Download a full report of errors by using the 'Download Report' button above.

The file contained 6 new contacts, including:

Line No	Action	Email	Firstname	Lastname	Company	Phone	Mobile	All Groups-Date Acquired	All Groups-Lead Source	All Groups-Account Representative	All Groups-Service Preferences	Groups	Tags
2	Added	janedoe223@onefitness.com	Jane	Doe	One Fitness	+18883625544	+19516783322	20201020	TradeShow	John	Service A	Trade Show,New Leads	TS
4	Added	jakep32@outlook.com	Jake	Pikesmith	Verizon	+19594439929	+18584439929	20201020	TradeShow	John	Service C	Trade Show,New Leads	TS
5	Added	juneedwards@unionbank.com	June	Edwards	Union Bank	+18589900231	+18587890887	20201020	TradeShow	John	Service A,Service B	Trade Show,New Leads	TS
6	Error	c.ervin@kgp.com	Calvin	Ervin	KGP		+447600921289	20201020	TradeShow	Amber	Service A,Service C	Trade Show,New Leads	TS

Zapier Integration

WHAT IS ZAPIER

Zapier is an online automation tool that connects your favorite apps. It helps to automate tasks without coding or relying on developers to build the custom integration.

WHY USE ZAPIER

Zapier does the work for you. With Zapier taking care of repetitive tasks, you can focus on business challenges that need your immediate attention.

CONNECTING WITH ZAPIER

Connect to 3,000+ Apps.
Once you've created a Zap, Zapier will run it for you automatically without any additional effort on your part.

ZAPIER BEST PRACTICES

To use Zapier, you must provide the account owner login information for your account. Shared access credentials cannot trigger zaps.

Monitor your Zap and look out for emails from Zapier.

Make sure you do not have duplicate actions happening once a new contact is added to your CRM.

Talk with your sales and marketing teams before setting up your connections.

Gauge the quality of the leads and data you are bringing in through your connections.

MORE BUILT-IN INTEGRATIONS

PAYMENT GATEWAYS

PayPal: Collect payments and donations

Stripe & Authorize.Net: Collect payments from invoices, website storefront, web forms, and event registrations

ZOOM

The native integration allows you to pull Zoom webinars and meeting attendees automatically into your CRM.

Note that you must be at the Zoom Pro level or higher for the integration to work

QUICKBOOKS

Synchronize contacts and invoices with QuickBooks through Contacts > Import > Quickbooks.

Synchronization will occur every 60 minutes while the Web Connector is loaded & QuickBooks is open.

OTHER

Evernote: Import new contacts and scanned business

Email Journaling Configuration: Often used as an alternative to IMAP integration


CONGRATULATIONS
ON SETTING UP
YOUR NEW
ACCOUNT!