

Nimble Quick Start Guide



Adding contacts, team members, activities, social networks
and third party applications.

Welcome to the Nimble Quick Start Guide

Nimble is a cloud-hosted social CRM solution for small businesses.

This is a Quick Start Guide to help you get started on Day 1. Of course Nimble is jam-packed with features not specifically listed in this document. For a full feature set visit nimble.com/how-it-works.

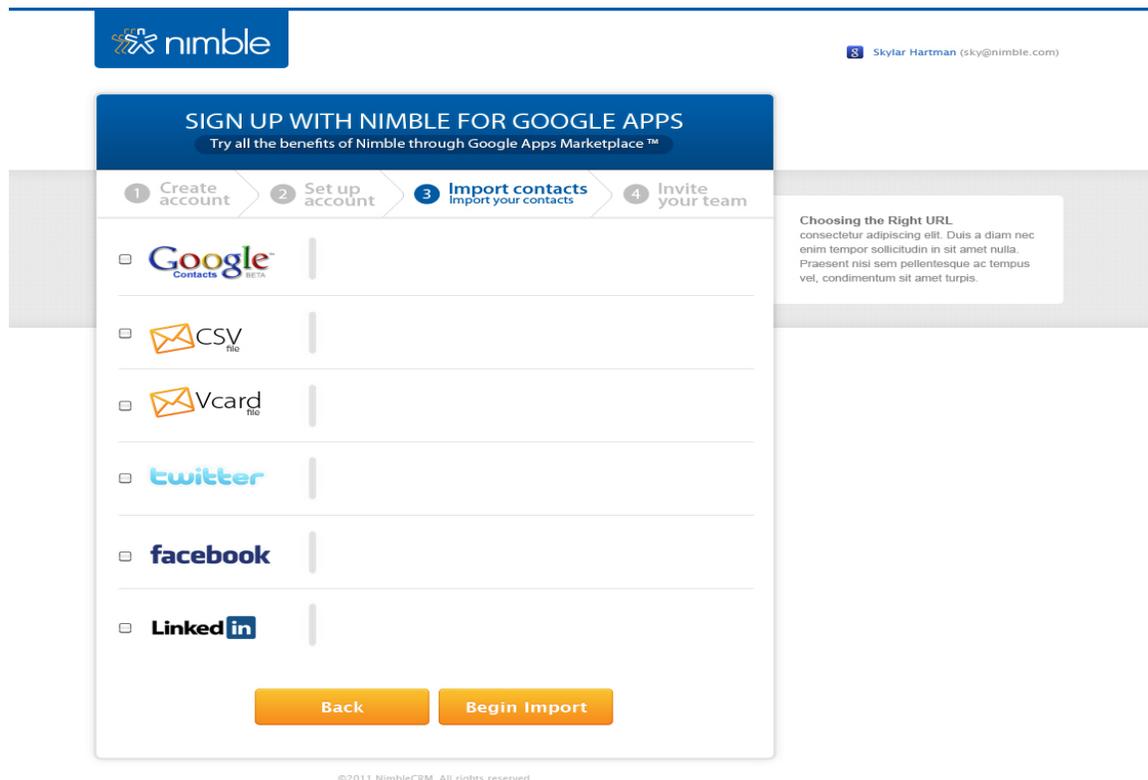
For additional support you may email us at support@nimble.com or visit support.nimble.com - we're always happy to help.

Importing your contacts.

Importing your contacts into Nimble is as easy as 1-2-3.

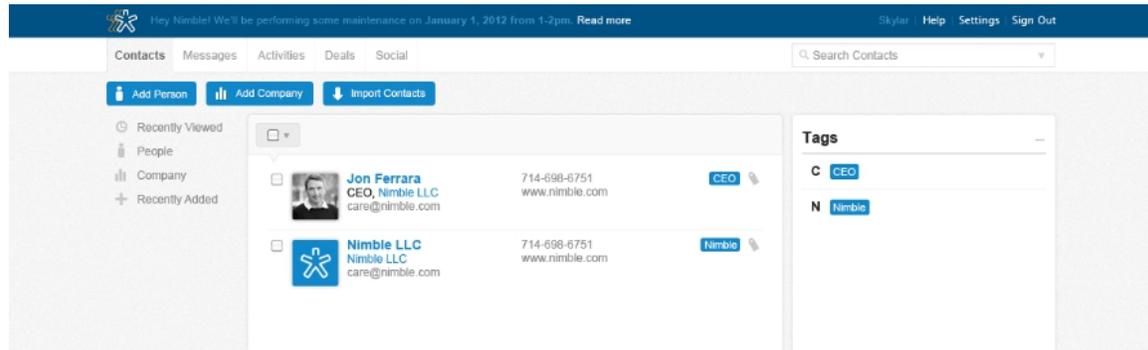
Simply select which email and social networks you want to add to Nimble and the software will automatically prompt you to add contacts from those networks.

Nimble will also automatically tag contacts based on which network they populate from for easy sorting.



Once you click the “Begin Import” button Nimble will take just a few minutes to gather all of your contacts and create contact records for each one.

Navigating the dashboard.



When you log into Nimble you will land in your dashboard which defaults to the Contacts tab. This is because your contacts are the heart of your business and the basis for needing a social CRM.

From this view you can search and find all of your individual and business contacts. You search for specific contacts using Tags or the search bar.

Other tabs located in the dashboard include:

- **Messages:** This tab shows you emails from the accounts you connected to Nimble during import.
- **Activities:** This tab shows you all of your upcoming tasks and calendar events.
- **Deals:** This tab is all about sales forecasting. You can add new deals and track current deals.
- **Social:** This tab provides a unified inbox for all of your social networks.

The Nimble dashboard gives you quick access to all the information you need for each of your contacts.

Adding team members to Nimble.

Nimble works best when your entire team has access to all the information they need to communicate with your prospects and customers.

Adding team members to your Nimble account is very easy. The account owner simply needs to go to Settings -> Users -> Invite Users.

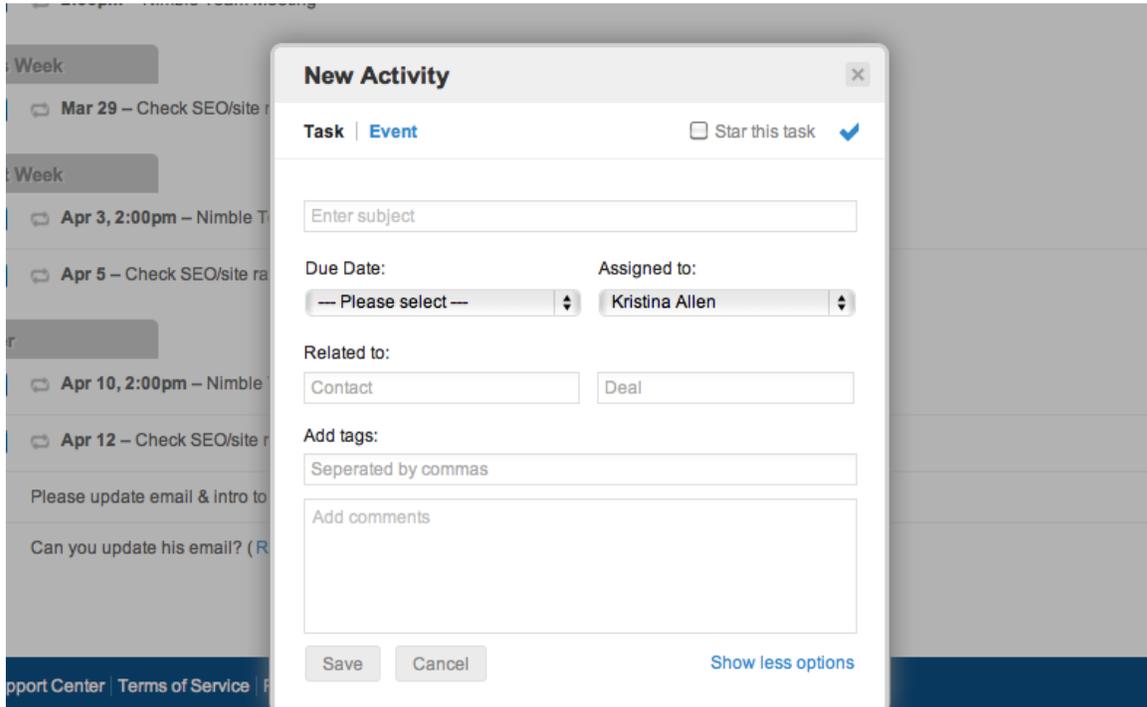


If you don't already have a Business account you will need to upgrade to add new users. However, we offer a FREE 30-day trial (no credit card required) on all Business accounts. If you decide you don't need team members inside your Nimble account - or any of the other [Pro features](#) that come with Nimble Business you can easily downgrade.

Give it a try though - most small businesses find having a single access point from which to share customer and prospect information makes them a more well-oiled machine. After all, when each team member is required to wear multiple hats, it's easy for small details to be forgotten during hallway meetings. However, Nimble never forgets a thing.

Adding and sharing activities.

You have a busy schedule and need to keep track of who to follow up with, when your next meeting is and what needs approval. Nimble's Activity tab is where you store all of this information.



The image shows a 'New Activity' modal window in the Nimble CRM interface. The window has a title bar with 'New Activity' and a close button. Below the title bar, there are two tabs: 'Task' (selected) and 'Event'. To the right of the tabs is a checkbox labeled 'Star this task' which is checked. The form contains several input fields: a text field for 'Enter subject', a 'Due Date' dropdown menu set to 'Please select', an 'Assigned to' dropdown menu set to 'Kristina Allen', a 'Related to' section with two dropdown menus set to 'Contact' and 'Deal', and an 'Add tags' section with a text input field containing 'Seperated by commas'. At the bottom of the form, there are three buttons: 'Save', 'Cancel', and 'Show less options'.

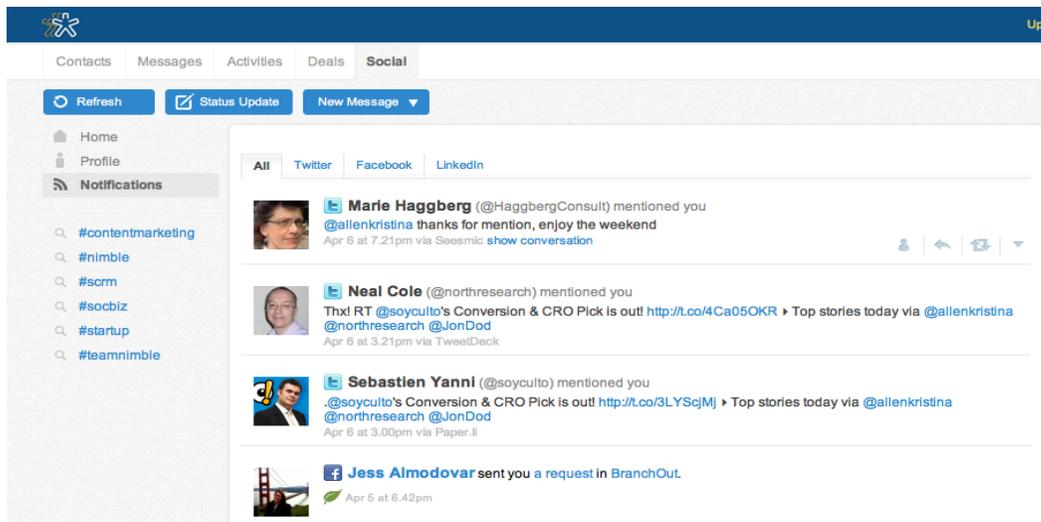
When you navigate to the Activities tab in Nimble you'll be able to quickly create new tasks, associate them with the right contact and even assign the task to a different team member (or yourself). You can associate the task with an existing Deal, add comments for yourself or team members and even make the task easily sortable by using tags.

News Tasks and Events will populate in your calendar. All the information you need directly at your fingertips! It's not magic, it's Nimble.

Getting a unified view of your social networks.

What makes Nimble a standout CRM is that it's social at the core.

Every feature from the Contact record to Tasks has an element that allows you to connect real-time social data. At Nimble HQ we believe having the most up-to-date information about a Contact lets you engage in the kind of conversations that build long-lasting relationships.



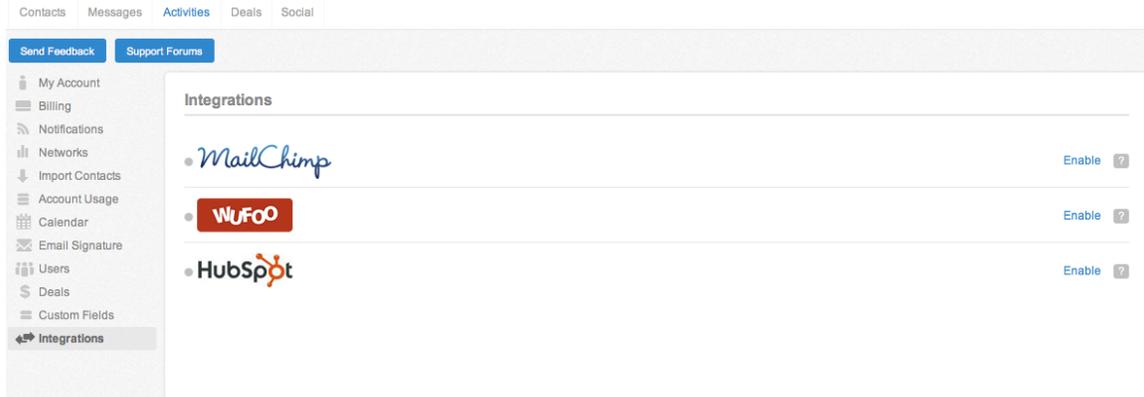
Within Nimble's Social tab you can view all of your social conversations and streams in one unified view without having to go to a variety of different web pages and apps. You can also search your social networks for specific contacts or keywords to begin engaging one person or an entire community in an intelligent, social conversation.

Additionally, when you view a contact record from within Nimble you can expand it to view real-time social media updates from any network that your contact is connected to.

Adding third party integrations.

You can extend the power of Nimble through the use of third party apps.

Offering lead capture and analytics, email marketing support and more, Nimble's add-ons give your business even more ways to close the marketing and sales loop.



Adding a third party integration to your Nimble account is easy! Just navigate to Settings ---> Integrations. From this view you will see a list of integrations available. Simply click the Enable button on the ones you want to connect and Nimble will walk you through the steps for setting it up.

Would you like more help?

No problem! We're always here to support you.

Email Us:

support@nimble.com

Tweet Us:

[@nimble](https://twitter.com/nimble)

Leave a comment on Facebook:

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