

Batchbook Admin Quick Start Guide

We've put together this guide to make sure you can jump right in, play with your shiny new Batchbook account and see some exciting results quickly!

What can you accomplish with Batchbook?

- Find your best customers and love them more
- Engage new clients
- Simplify your process and save time
- Get your whole team involved

What are the best ways to accomplish this?

We have LOTS of opinions about the ways to best reach these goals using Batchbook! We whole-heartedly believe you should:

- **Gather your most engaged contacts.** At Batchbook we encourage you to keep your contact numbers lower, not higher. Make sure folks in your Batchbook account are the folks who are engaged with your business - because they are a current client, a strong potential client, a vendor, or someone who supports you and the work you do. Inundating your account with folks who aren't meaningful muddies the water, making it hard for the right folks to be seen and heard.
- **Improve your data - customize.** Batchbook is very customizable and easy to use, but we all think slightly different from the person sitting next to us (that's what makes it fun, right?!). So, use our 'Batchbook User Quick Start' to make this a little easier. Take a moment to customize it specifically for your team then share it with each user on the account to engage and educate them on best practices!
- **Get your whole team involved.** Anyone who is engaging with your clients should be added as a user on the account. Every relationship is important to your business. Keep track of them all.
- **Check in on your account and progress.** Take time to periodically step back and clear your account of contacts that never really engaged as well as tags and Customer Fields that never quite worked out. Use this info to fine-tune your ongoing approach.

What should my next steps be?

- **Brainstorm** with your team about what you want Batchbook to do for you.
- [Add Key users](#) to the account and encourage them to take a look.
- If new to Cloud apps or CRM watch this [webinar](#) for instruction on getting started.
- Flush out your workflow with an [onboarding specialist](#). Encourage other key users to participate.
- [Add more users](#) and share Batchbook User Quick Start Guide with them.
- **Relax** with the knowledge your customers will be getting the attention they deserve from you!

How can Batchbook help me along the way?

- Check out our [Screencasts, webinars](#) & [knowledge base](#) for help with functionality
- Get concrete examples by checking out the [Batchbook Guides](#) and account [Custom Field samples](#)
- Chat with an [onboarding specialist](#) to help configure your account to your needs.
- Dive into the [community forums](#) to share ideas with other Batchbook users.
- Stay in touch - email us your questions/concerns or send us a quick message via Live Chat. Tell us what you love, what you don't and what you'd love to see down the road.