

ActiveCampaign Basic How-To Guide

Page 1 – How to Add a Note

Page 3 – How to Add a Task

Page 5 – Viewing recent activity

Page 7 – Commenting on activities (i.e. notes, tasks, etc.)

Page 9 – How to Add a Tag

Page 11 – Filter EAB/PERQUE customers in Deals section

Page 13 – Sending an email

Page 15 – How to Add a Contact

Page 16 – How to Add a Deal

Login to ActiveCampaign: <https://pih.activehosted.com>

Add a note

From the “Deals” section, click on one of your deals/contacts > Click Add Note

The screenshot shows the ActiveCampaign interface for the 'Deals' section. At the top, there's a breadcrumb 'Deals / Hona' and a settings gear icon. Below this is a filter bar with 'Add a filter', 'All Deal Owners', 'Open', and 'All Tags'. A search bar on the right says 'Search title, email'. The main content area is divided into four columns, each representing a deal stage with a gear icon for settings:

- Prospect (15/7)**: 5 deals, \$0 USD. Deals listed include 'Detox Webinar' (Adam Yang, No task), 'Alkaline Way to Healthy Weight Webinar' (Liz Friedman, No task), 'Dr. Russell Jaffe Qualified Score Prospect' (Teddy Atlas, No task), 'Detox Webinar' (Kacie Sobsey, No task), and 'LRA Science Webinar' (Trevor Williams, No task). An 'Add a deal' button is at the bottom.
- Hot Prospect (15/7)**: 3 deals, \$0 USD. Deals listed include 'Predictive Biomarkers Virtual Workshop' (Mischelle Hall, 3 days), 'EAB Account Request' (Justin Welton, 2 days), and 'PERQUE Account Request' (Pradeep Varadan, an hour). An 'Add a deal' button is at the bottom.
- First Purchase**: 1 deals, \$0 USD. Deal listed is 'PIH Qualified Score Prospect' (Jayashree Mani, 3 hours). An 'Add a deal' button is at the bottom.
- Nurture**: 3 deals, \$0 USD. Deals listed include 'Zinc & Throat Guard Sample Request' (Carmen Testing, 6 days), 'Zinc and Throat Guard Sample Request' (Russell Jaffe, 12 days), and 'Life Guard Mini Sample Request' (Travis Looney, a month). An 'Add a deal' button is at the bottom.

Three arrows originate from the top left and point to the 'Add a deal' button at the bottom of the Prospect column.

Deals / Detox Webinar Actions

Detox Webinar
\$0 USD

Five Springs Health and Wellness
 Adam Yang

Deal Owner
Hona Kandi
 Forecasted Close Date
Set Date
Created 09/14/2020 (4 days ago)
Updated 09/14/2020 (4 days ago)

Pipeline: Hona
Stage: Prospect (15/7) (4 days)
Status: Open

About This Deal

Hide Empty Fields

Manage Fields

General Details

Deal Description

Click to add

Customer

Click to add

Notes

Emails

Conversations (0)

There are no notes

Add a Note

Tasks

Open

There are no open tasks

Contacts (1)

Adam Yang

Five Springs Health and Wellness

AdamYang03030239@gmail.com

LAST CONTACTED --

Recent Activity

Deal created

09/14/2020 12:05 PM (4 days ago)

Adam Yang added to deal

09/14/2020 12:05 PM (4 days ago)

Add a task

From the “Deals” section, click on one of your deals/contacts > Add Task > Add Title & Information and Click Add Task

Deals / Hona 

 Add a filter All Deal Owners  Open  All Tags 

Prospect (15/7) 	Hot Prospect (15/7) 	First Purchase 	Nurture 
5 deals \$0 USD	3 deals \$0 USD	1 deals \$0 USD	3 deals \$0 USD
Detox Webinar  Adam Yang No task	Predictive Biomarkers Virtual Workshop  Michelle Hall  3 days	PIH Qualified Score Prospect  Jayashree Mani  3 hours	Zinc & Throat Guard Sample Request  Carmen Testing  6 days
Alkaline Way to Healthy Weight Webinar  Liz Friedman No task	EAB Account Request  Justin Welton  2 days	 Add a deal	Zinc and Throat Guard Sample Request  Russell Jaffe  12 days
Dr. Russell Jaffe Qualified Score Prospect  Teddy Atlas No task	PERQUE Account Request  Pradeep Varadan  an hour		Life Guard Mini Sample Request  Travis Looney  a month
Detox Webinar  Kacie Sobsey No task	 Add a deal		 Add a deal
LRA Science Webinar  Trevor Williams No task			
 Add a deal			

Deals / Detox Webinar Actions

Detox Webinar \$0 USD

Deal Owner
Hona Kandi

Forecasted Close Date
Set Date

Created 09/14/2020 (4 days ago)
Updated 09/14/2020 (4 days ago)

Pipeline: Hona **Stage:** Prospect (15/7) (4 days) **Status:** Open

About This Deal Hide Empty Fields Manage Fields

General Details

Deal Description Click to add

Customer Click to add

Notes **Emails** **Conversations (0)** Add a Note

There are no notes

Tasks Add a Task

Open

There are no open tasks

Contacts (1) Add a Contact

Adam Yang ★
 Five Springs Health and Wellness
 AdamYang03030239@gmail.com
 LAST CONTACTED --

Recent Activity Show All Activities

Deal created
 09/14/2020 12:05 PM (4 days ago)

Create Task for Detox Webinar ×

Title

Task Type

Assigned to:

Due Date

Due Time

[Show more options](#)

☐ Mark Complete

Add Task

Note: Click Mark Complete or the checkbox (below) when the task is completed

[Deals](#) / Zinc & Throat Guard Sample Request Actions

Zinc & Throat Guard Sample Request \$0 USD

Rockford Weight Loss
 Carmen Testing

Deal Owner
Hona Kandi

Forecasted Close Date
Set Date

Created 09/14/2020 (4 days ago)
Updated 09/15/2020 (3 days ago)

Pipeline: Hona
 Stage: Nurture (4 days)
 Status: Open

About This Deal Hide Empty Fields | Manage Fields

General Details

Deal Description Click to add

Customer PERQUE

Notes

Emails

Conversations (0)

Add a Note

Tasks (1) Add a Task

Open
 Today Fri Sep 18

☐ Follow up: Sample Request
 09/18/2020 05:00 PM
 Assigned to: Hona Kandi

Contacts (1) Add a Contact

Carmen Testing ★
 Rockford Weight Loss
 5556669998 cbarnes+3@activecampaign.com
 LAST CONTACTED EMAIL - INVALID DATE

Recent Activity

Show All Activities

View recent activity

From the “Deals” section, click on one of your deals/contacts > Click Show All Activities on bottom right > Filter between All Activities, Campaign Emails, Deal Updates, Emails, Notes, Tasks

Deals / Hona 

 Add a filter

All Deal Owners 

Open 

All Tags 

 Search title, email

Prospect (15/7) 

5 deals \$0 USD

Detox Webinar
 [Adam Yang](#) No task

Alkaline Way to Healthy Weight Webinar
 [Liz Friedman](#) No task

Dr. Russell Jaffe Qualified Score Prospect
 [Teddy Atlas](#) No task

Detox Webinar
 [Kacie Sobsey](#) No task

LRA Science Webinar
 [Trevor Williams](#) No task

 Add a deal

Hot Prospect (15/7) 

3 deals \$0 USD

Predictive Biomarkers Virtual Workshop
 [Michelle Hall](#) ✓ 3 days

EAB Account Request
 [Justin Welton](#) ✓ 2 days

PERQUE Account Request
 [Pradeep Varadan](#) ✓ an hour

 Add a deal

First Purchase 

1 deals \$0 USD

PIH Qualified Score Prospect
 [Jayashree Mani](#) ✓ 3 hours

 Add a deal

Nurture 

3 deals \$0 USD

Zinc & Throat Guard Sample Request
 [Carmen Testing](#) ✓ 6 days

Zinc and Throat Guard Sample Request
 [Russell Jaffe](#) ✓ 12 days

Life Guard Mini Sample Request
 [Travis Looney](#) ✓ a month

 Add a deal

Deals / Detox Webinar

Actions 

 **Detox Webinar** \$0 USD 

 [Five Springs Health and Wellness](#)

 [Adam Yang](#)

 Deal Owner [Hona Kandi](#) 

Forecasted Close Date
 Set Date 

Created 09/14/2020 (4 days ago)
 Updated 09/14/2020 (4 days ago)

Pipeline: Hona 

Stage:  Prospect (15/7) (4 days) 

Status: Open 

About This Deal  Hide Empty Fields | [Manage Fields](#)

General Details

Deal Description Click to add

Customer Click to add 

Notes **Emails** **Conversations (0)**

 Add a Note

 There are no notes

Tasks [Add a Task](#)

Open 

 There are no open tasks

Contacts (1) [Add a Contact](#)

 [Adam Yang](#) 

Five Springs Health and Wellness
 ✉ [AdamYang03030239@gmail.com](#)
 LAST CONTACTED --

Recent Activity [Show All Activities](#)

Deal created
 09/14/2020 12:05 PM (4 days ago)

Commenting on activities

From the “Deals” section, click on one of your deals/contacts > Click Show All Activities on bottom right > Click Comment on whichever recent activity you choose

Note: to comment to a certain person (example: letting Melissa know about something) type “@” and enter Melissa’s name

Deals / Hona

Prospect (15/7)	Hot Prospect (15/7)	First Purchase	Nurture
5 deals \$0 USD	3 deals \$0 USD	1 deals \$0 USD	3 deals \$0 USD
Detox Webinar Adam Yang No task	Predictive Biomarkers Virtual Workshop Michelle Hall ☒ 3 days	PIH Qualified Score Prospect Jayashree Mani ☒ 3 hours	Zinc & Throat Guard Sample Request Carmen Testing ☒ 6 days
Alkaline Way to Healthy Weight Webinar Liz Friedman No task	EAB Account Request Justin Welton ☒ 2 days	Add a deal	Zinc and Throat Guard Sample Request Russell Jaffe ☒ 12 days
Dr. Russell Jaffe Qualified Score Prospect Teddy Atlas No task	PERQUE Account Request Pradeep Varadan ☒ an hour	Add a deal	Life Guard Mini Sample Request Travis Looney ☒ a month
Detox Webinar Kacie Sobsey No task	Add a deal	Add a deal	Add a deal
LRA Science Webinar Trevor Williams No task			
Add a deal			

Deals / Detox Webinar

Detox Webinar \$0 USD
 Five Springs Health and Wellness Adam Yang

Deal Owner
 Hona Kandi

Forecasted Close Date
 Set Date

Created 09/14/2020 (4 days ago)
Updated 09/14/2020 (4 days ago)

Pipeline: Hona Stage: ■ Prospect (15/7) (4 days) Status: Open

About This Deal

General Details

Deal Description	Click to add
Customer	Click to add

Notes **Emails** **Conversations (0)**

There are no notes

Tasks

Open

There are no open tasks

Contacts (1)

Adam Yang ★
 Five Springs Health and Wellness
 ✉ AdamYang03030239@gmail.com
 LAST CONTACTED --

Recent Activity

Deal created
 09/14/2020 12:05 PM (4 days ago)

Recent Activities

All Activities



Deal Updated - [Detox Webinar](#)

Adam Yang added to deal



Justin Welton · 4 days ago

Comment

Add your comment

Cancel

Save



Added to Deal - Detox Webinar



Justin Welton · 4 days ago

Comment

Add a tag

From the “Deals” section, click on one of your deals/contacts > Click on the customer’s name > Look under “General Details” and find tag section > Click and enter your tag

Deals / Hona 

 Add a filter All Deal Owners  Open  All Tags 

Prospect (15/7) 	Hot Prospect (15/7) 	First Purchase 	Nurture 
5 deals \$0 USD	3 deals \$0 USD	1 deals \$0 USD	3 deals \$0 USD
Detox Webinar  Adam Yang No task	Predictive Biomarkers Virtual Workshop  Mischelle Hall  3 days	PIH Qualified Score Prospect  Jayashree Mani  3 hours	Zinc & Throat Guard Sample Request  Carmen Testing  6 days
Alkaline Way to Healthy Weight Webinar  Liz Friedman No task	EAB Account Request  Justin Welton  2 days	 Add a deal	Zinc and Throat Guard Sample Request  Russell Jaffe  12 days
Dr. Russell Jaffe Qualified Score Prospect  Teddy Atlas No task	PERQUE Account Request  Pradeep Varadan  an hour		Life Guard Mini Sample Request  Travis Looney  a month
Detox Webinar  Kacie Sobsey No task	 Add a deal		 Add a deal
LRA Science Webinar  Trevor Williams No task			
 Add a deal			

Deals / Detox Webinar Actions

\$

Detox Webinar

\$0 USD

Five Springs Health and Wellness

Adam Yang

Deal Owner

Hona Kandi

Forecasted Close Date

Set Date

Created 09/14/2020 (4 days ago)

Updated 09/14/2020 (4 days ago)

Pipeline: Hona

Stage: Prospect (15/7) (4 days)

Status: Open

About This Deal

Hide Empty Fields | Manage Fields

General Details

Deal Description

Click to add

Customer

Click to add

Notes

Emails

Conversations (0)

Add a Note

There are no notes

Tasks

Add a Task

Open

There are no open tasks

Contacts (1)

Add a Contact

Adam Yang

Five Springs Health and Wellness

AdamYang03030239@gmail.com

LAST CONTACTED --

Recent Activity

Show All Activities

Deal created

09/14/2020 12:05 PM (4 days ago)

Adam Yang added to deal

09/14/2020 12:05 PM (4 days ago)

Help

Contacts / Adam Yang

Personal Info

All Deals (1)

Address	492920 1st Ave
City	Franklin
State	OH
ZIP Code	32019
Country	United States
Preferred Method of Communication	Phone
How did you hear about us?	Company Website
What are you most excited to learn about? (check all that apply)	PIH Academy, LRA Testing
Email Content Interests	Webinars & Videos
Phone	Click to add a phone number
Account	Five Springs Health and Wellness
Tags	Detox Webinar Enter tag
Lists	Training List Add
Automations	Add

Recent Activities

Deal Updated - Detox

Adam Yang added to de

Justin Welton · 4 d

Comment

Added to Deal - Detox

Justin Welton · 4 d

Comment

Subscribed to list

Subscribed to list Traini

14 days ago

Comment

Filter EAB/PERQUE customers

Click “Add a Filter” > Click “Custom Deal Fields” > Customer > Toggle “Is” section > Choose EAB/PERQUE or EAB and PERQUE

Deals / Ashley 

 Add a filter All Deal Owners ▾ Open ▾ All Tags ▾

EAB Handoffs 	PERQUE Handoffs 	A 	B 	C 
1 deals \$0 USD	Could not find any deals. Try adjusting your filters or search terms.	3 deals \$0 USD	Could not find any deals. Try adjusting your filters or search terms.	1 deals \$0 USD
New Day Wellness Center  Patty O'Furniture No task		Cornerstone Chiropractic Center  Thomas Underwood No task		Shades Optical  Elizabeth Jennings No task
 Add a deal	 Add a deal	Rockford Weight Loss  Steve Levy No task	 Add a deal	 Add a deal
		Five Springs Health and Wellness  Skye Blue No task		
		 Add a deal		

Deals / Ashley ▾ 

 Add a filter All Deal Owners ▾

 Search

Deal Details ▶

Custom Deal Fields ▼

Customer

 Add a deal

← **Back**

Customer



Is

✓ EAB

PERQUE

EAB & PERQUE



Is empty



Is not empty

Apply

Sending an email

From the “Deals” section, click on one of your deals/contacts > On the bottom right, click the customer’s email > Create email and send to customer

Deals / Hona 

 Add a filter All Deal Owners Open All Tags

Prospect (15/7)	Hot Prospect (15/7)	First Purchase	Nurture
5 deals \$0 USD	3 deals \$0 USD	1 deals \$0 USD	3 deals \$0 USD
Detox Webinar  Adam Yang No task	Predictive Biomarkers Virtual Workshop  Michelle Hall  3 days	PIH Qualified Score Prospect  Jayashree Mani  3 hours	Zinc & Throat Guard Sample Request  Carmen Testing  6 days
Alkaline Way to Healthy Weight Webinar  Liz Friedman No task	EAB Account Request  Justin Welton  2 days	 Add a deal	Zinc and Throat Guard Sample Request  Russell Jaffe  12 days
Dr. Russell Jaffe Qualified Score Prospect  Teddy Atlas No task	PERQUE Account Request  Pradeep Varadan  an hour		Life Guard Mini Sample Request  Travis Looney  a month
Detox Webinar  Kacie Sobsey No task	 Add a deal		 Add a deal
LRA Science Webinar  Trevor Williams No task			
 Add a deal			



Detox Webinar \$0 USD

Five Springs Health and Wellness Adam Yang

Deal Owner
Hona Kandi

Forecasted Close Date
Set Date

Created 09/14/2020 (4 d
Updated 09/14/2020 (4 d

Pipeline: Hona Stage: Prospect (15/7) (4 days) Status: Open

About This Deal

Hide Empty Fields | Manage Fields

General Details

Deal Description Click to add
Customer Click to add

Notes

Emails

Conversations (0)

Add a Note

There are no notes

Tasks

Open



There are no open tasks

Contacts (1)

Add a C

Adam Yang ★
Five Springs Health and Wellness
AdamYang03030239@gmail.com
LAST CONTACTED --

Recent Activity

Show All Act

Deal created
09/14/2020 12:05 PM (4 days ago)

Send Email



To: Adam Yang (AdamYang03030239@gmail.com)
From: Justin Welton (jwelton@elisaact.com)

Subject

Best Regards,

Justin Welton
Digital Marketing Specialist

[How did I do today? Click here to let me know ?](#)

PERQUE® Integrative Health
www.PERQUE.com

ELISA/ACT® Biotechnologies
www.ELISA/ACT.com

Phone: 703.450.2980 ext. 3360

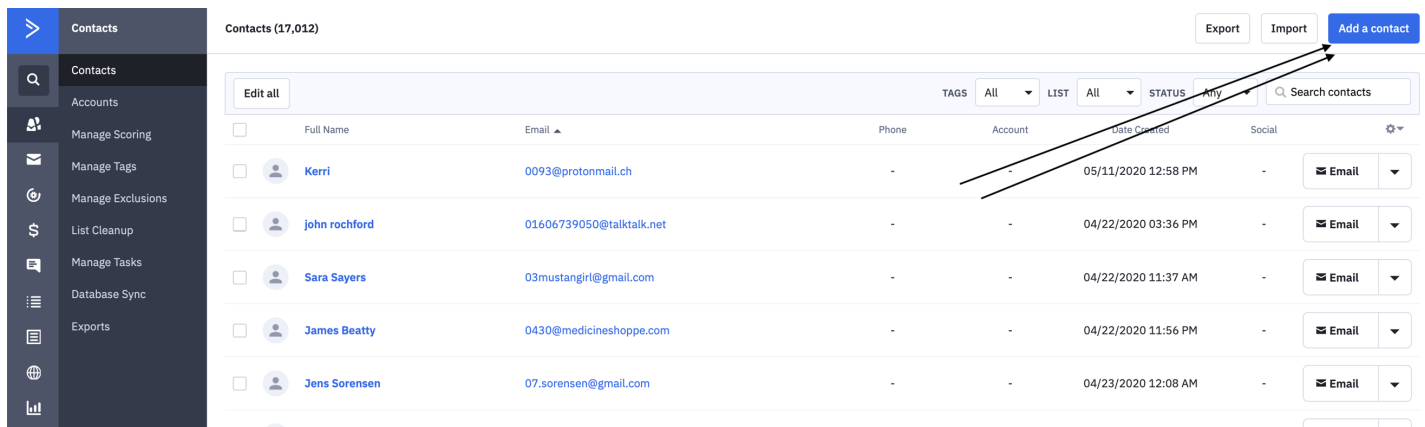
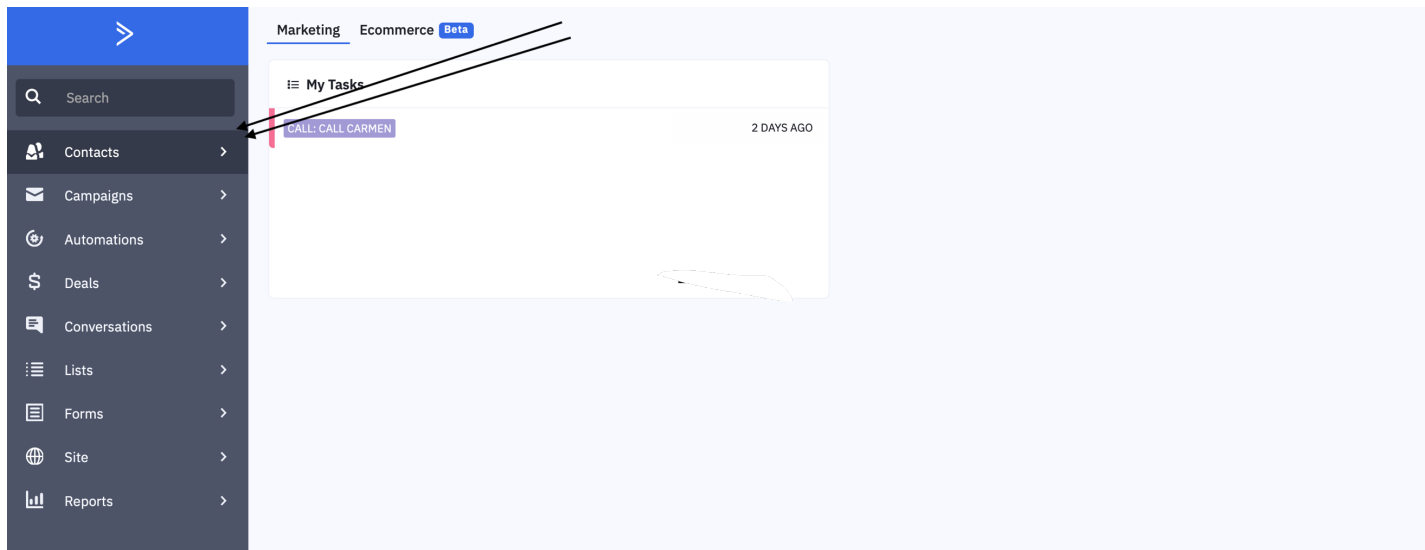
B *I* U [Link](#) [List](#) [List](#)



Cancel

Send

How to Add a Contact



Add a Contact



Email

First Name

Last Name

Phone Number

Account

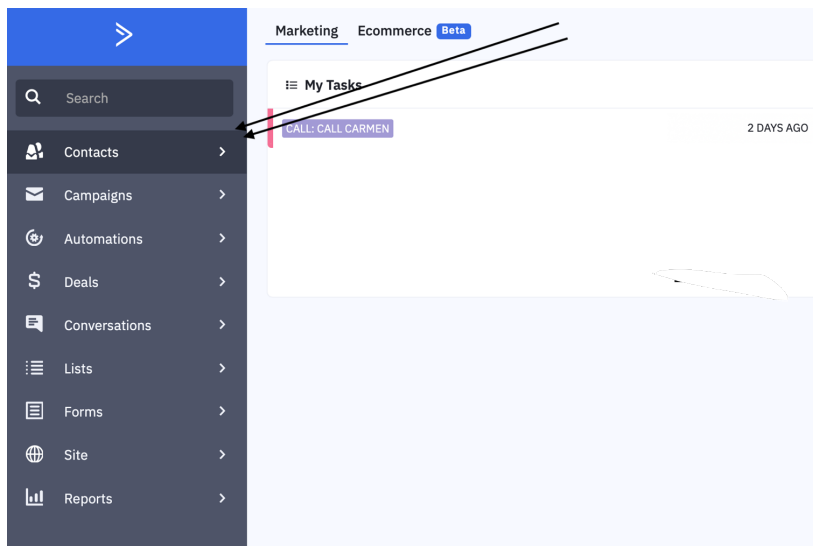
Select ▼

Only required fields are being displayed. [Click here to show custom fields.](#)

Cancel

Add

How to Add a Deal



Add a Contact

Email

First Name

Last Name

Phone Number

Account

Select

Only required fields are being displayed. [Click here to show custom fields.](#)

Cancel

Add

Contact Actions



Add to lists



Add a deal



Add to automations



Add tags



Advanced list options



Skip

Apply

OR

The screenshot shows the CRM interface. On the left is a dark sidebar with a search bar and a list of menu items: Contacts, Campaigns, Automations, Deals, Conversations, Lists, Forms, Site, and Reports. Each item has a right-pointing chevron. The 'Deals' item is highlighted with a red arrow pointing to it from the 'Add a deal' button in the previous screenshot. On the right, the main content area has tabs for 'Marketing', 'Ecommerce', and 'Beta'. Below the tabs is a section titled 'My Tasks' which contains a single task: 'CALL: CALL CARMEN' with a status of '2 DAYS AGO'.

Deals / Hona

Add a filter
All Deal Owners
Open
All Tags

Search title, email, phone, account

Add a stage
Add a deal

Prospect (15/7)	Hot Prospect (15/7)	First Purchase	Nurture
5 deals \$0 USD Detox Webinar Adam Yang No task Alkaline Way to Healthy Weight Webinar Liz Friedman No task Dr. Russell Jaffe Qualified Score Prospect Teddy Atlas No task Detox Webinar Kacie Sobsey No task LRA Science Webinar Trevor Williams No task Add a deal	3 deals \$0 USD PERQUE Account Request Pradeep Varadan a month EAB Account Request Justin Welton 15 days Predictive Biomarkers Virtual Workshop Michelle Hall 11 days Add a deal	1 deals \$0 USD PIH Qualified Score Prospect Jayashree Mani a month Add a deal	3 deals \$0 USD Zinc & Throat Guard Sample Request Carmen Testing a month Zinc and Throat Guard Sample Request Russell Jaffe a month Life Guard Mini Sample Request Travis Looney 14 days Add a deal

Add a New Deal



Deal Title 	Deal Value 100 USD
Pipeline Hona	Stage Prospect (15/7)
Deal Owner Justin Welton	Forecasted Close Date mm/dd/yyyy
Deal Description 	
Contact Enter a name or email or phone number	
Account Enter an account	

Cancel

Add Deal