

QUICKSTART CHECKLIST

We want you to benefit from Hatchback right away!
Use the below checklist to get your database up and running quickly and efficiently.

ACTIVATE YOUR ACCOUNT

If you have not done so already, check your inbox for an email titled “Welcome to Hatchback.” Click the link to activate your account.

SET UP EMAIL AUTHENTICATION

Email authentication is a process that allows you to mask Dyn (our email service provider) as your relay point in all of your emails and replace it with your domain. This can be accomplished with the addition of a few new DNS records and can lead to a better sending reputation and more consistent inbox delivery.

RESOURCE: [What is Email Authentication?](#)

TRACK YOUR CONVERSATIONS

- **Gmail Users:** Account Settings > My Info > Email Sync

Once you are connected, Hatchbuck will scan your inbox for emails over the last 6 months and upload them to matching contact profiles in your database. Now you can stay up-to-date with your conversations and continue to see new conversations in Hatchbuck daily.

RESOURCE: [Connecting to IMAP](#)

- **Non-Gmail Users:** Account Settings > My Info > BCC Email

If you don't use Gmail, no worries. Simply place your "Personal Hatchbuck Email Address" in the BCC field of any email you send out of your email client and it will be recorded as a Note on the contact's record.

RESOURCE: [BCC Email Integration](#)

CUSTOMIZE YOUR DATABASE

Make Hatchbuck more relevant to your needs by heading to **Account Settings > Customizations**. Prior to importing contacts we suggest updating the the following fields if they apply to you:

- **Contact Status:** All contacts in your database must have a contact status which should represent broad stages for the overall customer lifecycle. We recommend statuses like lead, prospect,

opportunity, customer, not interested, etc. Remember, you can always get more granular using the field below.

- **Deal Stages:** These represent the stages in your sales pipeline. Use deal stages that indicate the steps a qualified lead completes to become a customer or a lost sale. If you aren't ready to track your sales in Hatchback, skip this step and ask your Consultant how you can set this up at a later date.
- **Tags:** Use tags to show your contacts' general interests and behavior. An effective use of tags would be your Products or Services. Tags keep score and you will be able to automate actions based off those scores.
- **Lead Sources:** You'll want to know how your contacts got into your database and track if your marketing spend is paying off.
- **Custom Fields:** Using custom fields is a great way to house data on your contact or company records that Hatchback does not already provide for you.

RESOURCE: [Customize Your Database](#)

ORGANIZE YOUR SPREADSHEET

In order for an import to be most successful, make sure it is cleaned, organized, and saved as a CSV (comma delimited) file.

RESOURCE: [Organizing Before Import](#)

IMPORT YOUR CURRENT CONTACT LIST

Our easy-to-use Import Wizard will allow you to upload a CSV of your contacts into Hatchback quickly. Remember to create Custom Fields where needed.

RESOURCES: [Importing Video Tutorial](#) - [Walkthrough Guide](#)

TRACK YOUR WEBSITE TRAFFIC

We are able to track contacts' activity on your website if they have filled out a Hatchback form or clicked a link from an email sent out of Hatchback. Grab the tracking script from *Tools > Webpage Tracking > Tracking Code*.

RESOURCES: [Webpage Tracking Video Tutorial](#) - [Walkthrough Guide](#)

BUILD AN ONLINE FORM

Forms are a great way to capture leads or gather more information from your contacts.

RESOURCES: [Form Video Tutorial](#) - [Walkthrough Guide](#)

CREATE AN EMAIL TEMPLATE

Create beautiful emails using a pre-designed template or create your own with our Drag & Drop builder. Use the Basic Editor to create text-based emails that will appear more personal to your contacts or build your own HTML email.

RESOURCE: [Step-by-Step Guide to Creating Emails](#)

SEND AN EMAIL

You can send an email to one contact or a group of contacts. Once you've sent your first email from Hatchback, check out your Dashboard Activity Feed to see who's opening and clicking through your links.

RESOURCES: [Email Video Tutorial](#) - [Difference Between Test & Regular Email Sends](#) - [Guide to Your Dashboard](#)

For more information, check out our Hatchback Help Deck [videos and webinars](#) or our [Frequently Asked Questions](#).

Have more questions? Reach out to us at support@hatchback.com.