

VODOO CRM — Quick start

Welcome to the beta! These 5 actions get you up and running in about twenty minutes.

1

Finish onboarding and activate email

On your first sign-in, pick **Email** then **Activate**: the channel is ready, nothing to set up. Your emails are sent by VODOO CRM and your contacts' replies land in your inbox.

Where: Settings → Channels → Configure: sender name shown to your contacts

2

Import your contacts

A CSV file is enough (HubSpot, Pipedrive, Salesforce, Zoho presets). The **Tags** column is kept (several tags separated by “;”). An invalid row does not block the import: it is reported so you can fix it.

Where: Contacts → Import

3

Send your first campaign

Write the subject and message, personalise with `{{contact.first_name}}`, try it with **Send me a test**, then send. Unsubscribed contacts are excluded and every email carries an unsubscribe link.

Where: Broadcasts → New broadcast — tracking: sent, delivered, opened, failed

4

Talk to contacts from the inbox

Email a contact from their record (**Email** button) or from Conversations. Their reply comes back into the same conversation; an unknown sender automatically becomes a contact.

Where: Conversations — or contact record → Email

5

Automate

Create a workflow (e.g. trigger **Message received** → automatic reply), then turn it on from the list. To collect reviews: set your Google (or other) review link, then send review requests.

Where: Workflows → New workflow • Reputation → Configure review URLs

Good to know

- **Free trial until January 31, 2027** during the beta, with Standard features: up to 5,000 contacts and 500 emails per month. Days left are shown at the top of the screen.
- **Pro or Agency?** Settings → Billing → Choose this plan: also free until January 31, 2027, no credit card required.
- **SMS:** connect your own Twilio account and number in Settings → Channels.
- **Language:** French or English, anytime from the language icon at the top of the screen.

A problem, an idea?

Click the purple **Report an issue** button at the bottom right of every screen: your message reaches us directly, along with the page you were on. You can also write to **contact@vodoocrm.com**. Every piece of feedback counts, thank you!