



Good Software

Clever App Quick Start Guide

Automate and scale your sales processes.



Before You Start

Make sure you have:

- An active CleverApp account ([Sign up here](#))
- Access to your company's CRM (e.g., HubSpot, Salesforce)
- A list of sales contacts to import

Get Started in 5 Easy Steps

1. Log in to CleverApp

Go to cleverapp.goodsoftware.com in your browser.

- If you're a new user, click **"Create Account"** and follow the sign-up process (name, email, company, password).
- If your company uses **SSO (Single Sign-On)** like Google or Microsoft, you can use those options to log in securely.
- Can't remember your password? Click **"Forgot Password"** to reset it via email.

2. Connect Your CRM

From the dashboard, click **"Connect CRM"** and choose your provider.

✔ **Tip:** You can connect multiple CRMs later from **Settings > Integrations**.

3. Import Your Contacts

Click **"Import Contacts"**, select your source, and confirm the import.

📌 **Note:** Contacts are automatically deduplicated and categorized.

4. Set Up Your First Workflow

Navigate to **Workflows > Create New Workflow**, then:

- Choose a sales template (e.g., "Lead Nurture")
- Customize steps (emails, tasks, reminders)
- Click **"Activate"**

5. Track Progress in Real Time







Use the **Dashboard** to monitor engagement and pipeline health.

Visualize metrics like:

- Open rates
- Deal stage conversions
- Rep performance



UI Icon Glossary

Icon	Name	What It Means / Does
	Dashboard	Overview of your sales performance, workflows, and alerts.
	Sync / Refresh	Manually sync CRM data or refresh page info.
	Add New	Create a new contact, workflow, task, or note.
	Settings	Configure account, integrations, and preferences.
	Analytics	View sales metrics, conversion rates, and team stats.
	Task Complete	Marks a task or workflow step as done.
	Scheduled	Indicates an action or email is scheduled for later.
	Notifications	See alerts for CRM sync, activity updates, or reminders.
	Help / Support	Open the help center or contact support.

Need Help or Inspiration?

- Browse the [Help Center](#)
- Watch our [2-minute video walkthrough](#)
- Contact Support: support@goodsoftware.com

You're All Set!

CleverApp is here to **unleash productivity for your business**. Start automating and watch your sales scale.

Template Tips

- ✔ **Template tip:** This template uses the [Page Property / Content properties](#) macro to set the cover page subtitle (key: `subtitle`) and the image (key: `product-image`) in the cover.
- 📄 **Template note:** There's no need to layout your Confluence page content in two columns. The template handles that itself.

