



In addition to the suggested roadmap below, the question mark in the top, right-hand corner of your CRM is your best friend! Click on this icon to submit a help ticket, access our help desk, suggest a feature or enhancement and more!

- 1 Get acclimated** with your CRM by watching the Redtail CRM Overview Demo. This is our most popular webinar, a flyby of the CRM system showing you the ins and outs of the product.
 - Access a live schedule [HERE](#) (the Overview Demo is every Tuesday)
 - Find a recorded version of the demo [HERE](#)
- 2 NEW USER CHECKLIST!** Redtail CRM is coded to function in a certain way, i.e. pulling primary addresses and designating a head of household. Get to know things you should know by day 1, day 2 or on an ongoing basis with this checklist [HERE](#).
- 3 Brush up on some of the most day-to-day to functions of the CRM.** You can check out the following [Getting Started](#) series of videos:
 - [Navigation, Users & Teams](#)
 - [Site Preferences & Integrations](#)
 - [Database Lists & The Contact Record](#)
 - [Resources](#)
 - [Calendar & Activities](#)
- 4 Learn best practices** for relationship linking, client segmentation, planning to-do's or tracking history with the Redtail: First Steps Guide. Check out other recommendations [HERE](#).
- 5 You'll want to schedule yourself for continued education webinars** [HERE](#) whenever you see a topic that you find interesting on our schedule. Trainings occur every Thursday at 11am PST and after you take notes throughout you can ask a live trainer questions at the end. We record all of these topical sessions and put them in our webinar library for you to check out [HERE](#).

Note: If you're not a video person, we suggest you bookmark help.redtailtechnology.com.

After you select the Project Tailwag tile, [HERE](#) you will find documentation with screenshots on actions you'll perform in the CRM. You'll also find a search bar in the top-right—for example, if you want to quickly search, "Is there a way to run mail merges in Redtail?" you can find step-by-step help immediately!

**If you have any questions, please don't hesitate to call us at
800.206.5030 option 2 for Sales
800.206.5030 option 3 for Support.**

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