

**Salesloft.**

## **New User Guide**

New to the Salesloft platform? Start here for all you need to set up your account and learn basic functionality.

Salesloft.

# Salesloft New User Guide

## Summary

Are you looking to accomplish more using the Salesloft platform? This is the guide for you! We created these resources to help you get up and running in no time so you can generate more revenue faster.

1 [Admin checklist](#): Grant your team access and configure your account

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2 New User Guide: Establish your personal setting then explore more of the platform.

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## Quick Start: A new user's guide to Salesloft

### Set-up

A step-by-step series of videos and articles to walk you through setting up your Salesloft account

VIDEO: [Salesloft Univesity: Getting Started](#)

ARTICLE: [What is Sales engagement, the basics](#)

### Content Templates and Cadences

A series to walk you through building email communication and cadences.

VIDEOS: [Building content](#)

ARTICLE: [Template page](#)

### Importing

Learn how to use importing best practices to kick-start your sales engagement process.

VIDEOS: [Importing people](#)

[Managing People in Cadences](#)

ARTICLE: [Imports into Salesloft](#)

### Rhythm and Dashboard management

Use the Salesloft dashboard to set you up for a day of successful interactions.

VIDEO: [Dashboard Focus Zones](#)

ARTICLE: [Rhythm workflow page layout](#)

JOB AIDS: [Rhythm for Sellers](#)

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## Conversations

Conversation Intelligence is Salesloft's solution to meeting and call transparency, collaboration, and insights across your team.

VIDEOS: [Conversation Personal Settings](#)  
[Conversations Overview](#)  
[Recording Detail Page](#)  
[Conversations Playlist](#)  
[Conversation Clip Sharing](#)

ARTICLE: [Conversations Overview](#)  
[Conversation Summary](#)

## Deals

Salesloft Deals offers end-to-end management of the sales cycle. From lead sourcing and creation to close, your reps can update records, take notes, and view all of their opportunities through one pane of glass

VIDEOS: [Deals Summary Dashboard](#)  
[Deals Pipeline View](#)  
[Deal View](#)  
[Deals Note-taking Workflow](#)

ARTICLE: [Getting Started with Deals](#)

## Forecast

Our sales forecasting tool combines AI with real-time human insight to predict future sales outcomes with unprecedented precision. It's time to exceed your targets and propel your business forward.

VIDEOS: [Forecast Overview](#)  
[Submit your Forecast](#)

ARTICLE: [Introduction to Forecast](#)  
[Forecast Dashboard Overview](#)