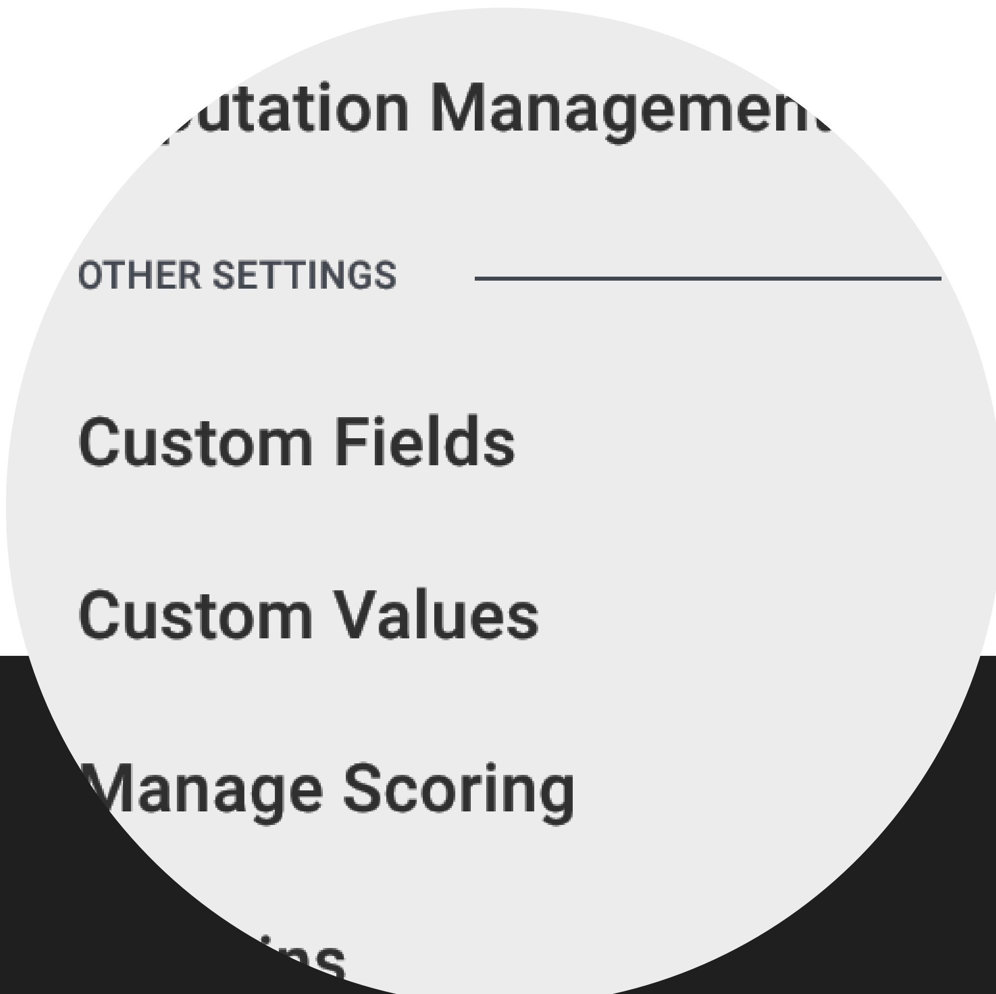
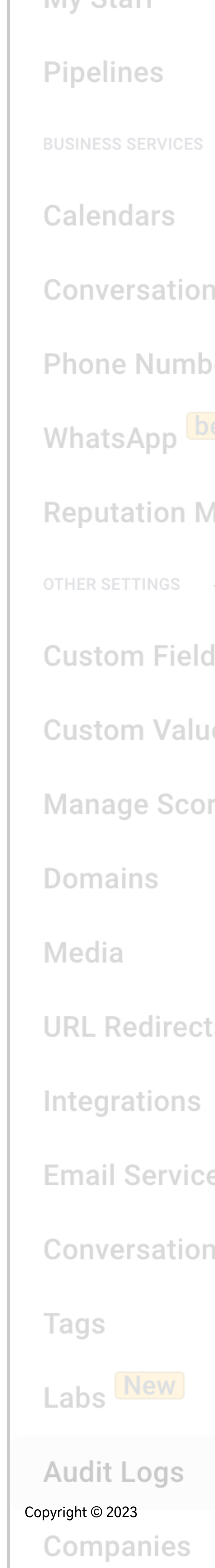
YOUR ACCOUNT
SETTINGS



November 2023

ACCOUNT SETTINGS OVERVIEW

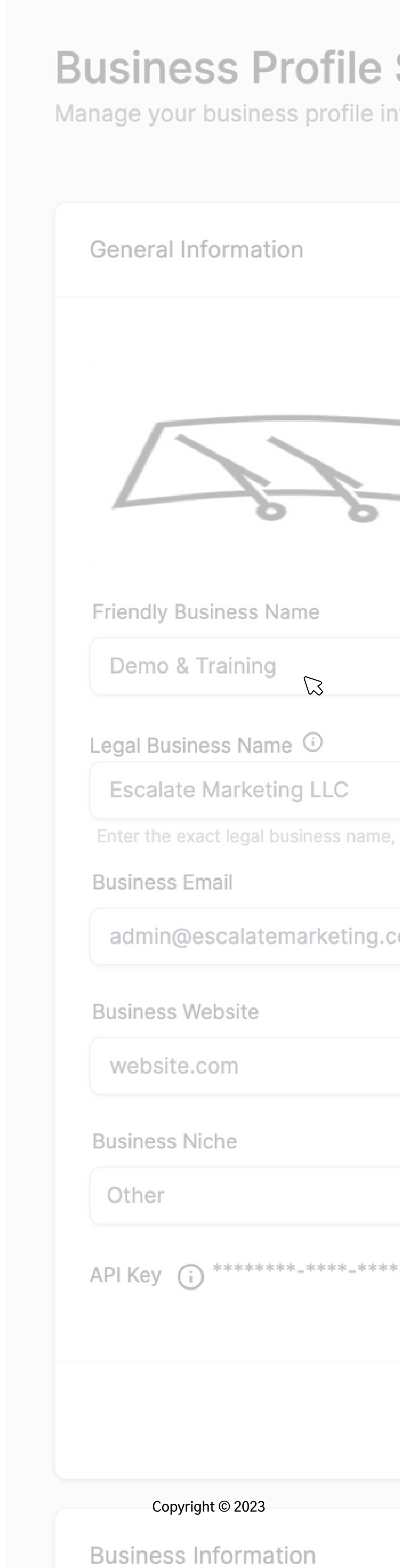
Feature	Description
Business Profile	Configure your account's most important information such as the company, location, and more
My Profile	Manage the user profile you are logged in as such as availability, contact information, and more
Company Billing	Add, update, & edit your accounts connected billing method, cards, credits, and view your billing history for pay per use features like content AI & premium options
My Staff	Manage the users in the account, edit their profiles, add, and remove users also
Pipelines	Create the stages of your process into one view & connect directly to your contacts
Calendars	Configure your user & account availability, calendar integrations, and create new appointment types (even organize them into groups)
Conversation AI	Configure and customize your accounts AI bot in conversations for your niche
Phone Numbers	Connect with your Twillio or LC Phone provider to add & manage the phone numbers associated with the account
Whatsapp	Offers lightning-fast messaging servers at an unbeatable price of $29.99 per month. Subscribe now and experience the most affordable messaging solution.
Reputation Management	Configure the email, SMS, and site widget for the account & easily pull them into review request steps & site pages
Custom Fields	Create, edit, organize, and manage the data fields that have been created in the account & are unique to each contact
Custom Values	Create, edit, and manage the predetermined data fields that have been created in the account and are unique to each account (not contact)
Manage Scoring	Measure how engaged contacts are with your platform is by using a predefined set of rules to create an Engagement Score. Use the score builder to add or subtract scores in a profile and publish it to make it live.
Domains	After configuring your DNS records, use this page to view, edit, and manage any root or subdomain
Media	Manage & organize all media files from the system
URL Redirects	Use your connected domains, add a path, and configure custom redirect links
Integrations	Connect with important ad & admin platforms like facebook, google, tik tok, and more
Email Services	Connect directly with an SMTP provider & manage account level email forwarding & BCC
Conversation Providers	View the list of conversation custom providers added to the account here
Tags	Create, edit, and manage all contact tags for the account
Labs	View & enroll in features that aren't yet released to get a sneak peek
Audit Logs	View all changes & updates made in a contact or related to a contact
Companies	Decide whether or not you want the system to automatically group contacts based on the company name field



BUSINESS PROFILE

Customize your account by updating essential information such as your company, location, and other pertinent details. This will not only make your account feel more personalized, but it will also improve your networking opportunities within the platform. By regularly updating your account information, you can ensure that you are presenting yourself & your brand.

General Information	Fill in the basic information about your business for your account
Physical Address	Fill in the operating address of your business.
Business Information	Fill in the licensing or registration details of your business.
Authorized Representative	Fill in these the operating admin contact info of your business.
Call & Voicemail Settings	Configure your account's voicemail settings when a contact calls your accounts phone number.
General	Configure other settings for your account like SMS compliance.
Contact Duplication	Configure how you want your account to handle duplicate contacts.
Missed Call Text Back	Configure how you want the system to handle follow up to missed calls.

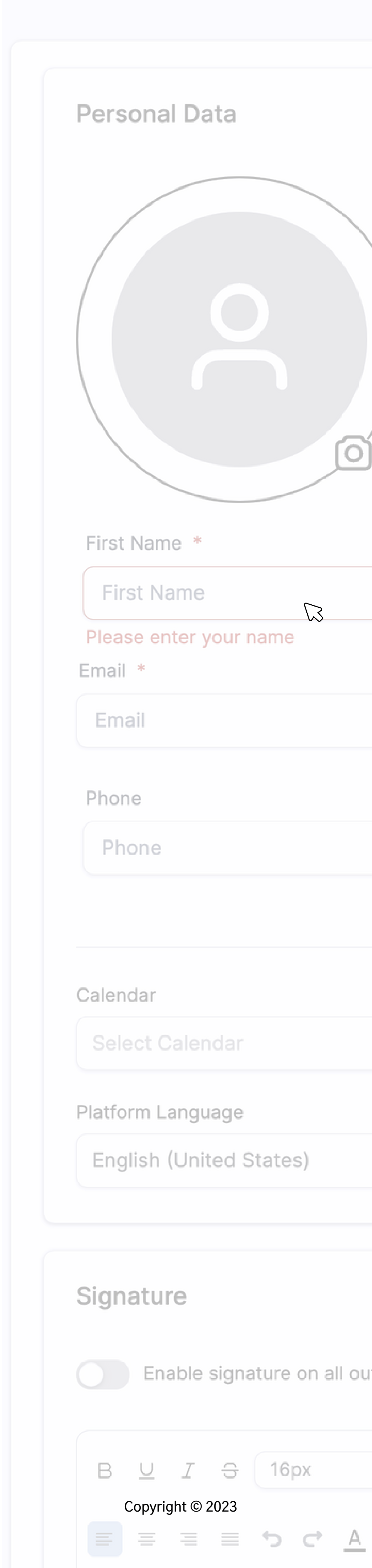


MY PROFILE

Your user profile is an important aspect of your online presence. It's where you manage your availability, contact information, and other details from your user profile?

By taking control of your user profile, you can ensure that you're presenting yourself in the best possible light. This means keeping your availability up to date, so that people know when they can expect to hear back from you. It also means making sure that your contact information is accurate and easy to find, so that people can get in touch with you if they need to.

- **Personal Data** — Fill in your contact information and other user specific fields.
- **Signature** — Create your email signature & settings regarding it.
- **Integration** — Connect to Zoom, Outlook, or iCloud calendar sync options.
- **Email 2 Way Sync** — Connect with a Gmail or Outlook email to sync into your account.
- **Password** — Update & reset your user password to login.
- **User Availability** — Set a meeting location for any appointments booked with you.
- **Available Hours** — Set your users specific hours you are available to work.
- **Calendar Configuration** — Choose which of your calendar integrations you want to sync & check for conflicts.



COMPANY BILLING

Keep your billing information up-to-date by adding, updating, and editing your connected billing method, cards, and credits. You can also view your billing history for pay-per-use features such as content AI and premium options.

Maintaining accurate billing information is an important aspect of managing your account. By ensuring that your billing information is current and up-to-date, you can avoid any potential disruptions to your services or unexpected charges.

Payment Methods — Manage the credit card connected to your account & charged.

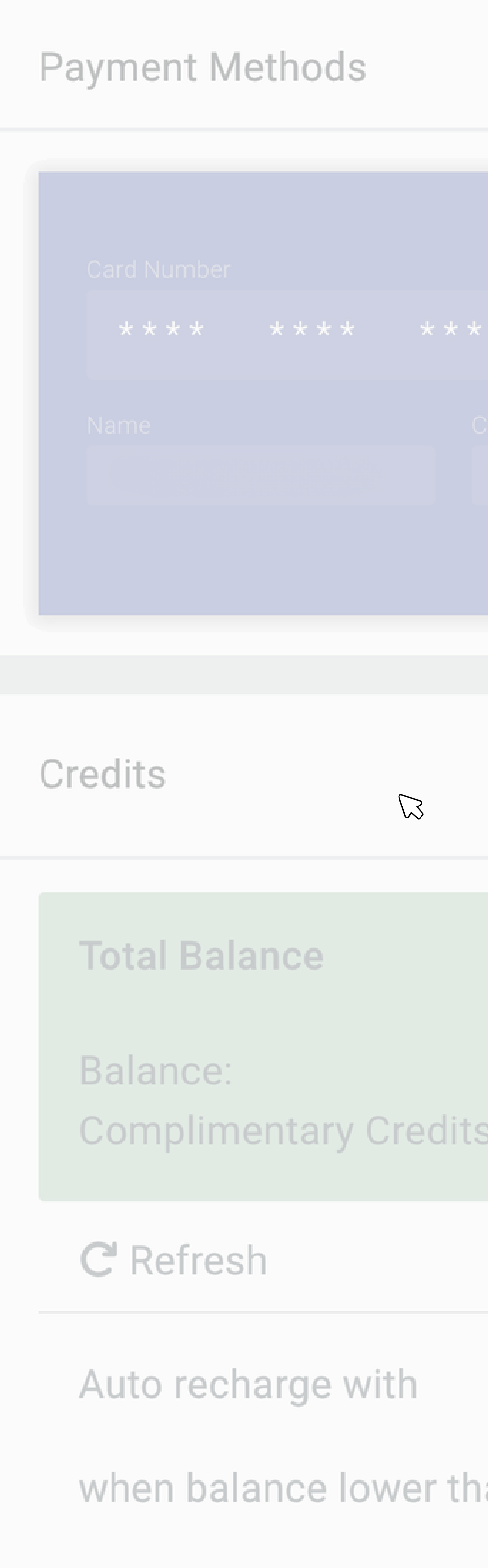
Credits — A numerical value that represents a number of uses across pay per use features.

Balance — A numerical value that represents how much money is left in your account to be used up across pay per use features.

Billing History — View the log of charges made to your account.

Complimentary Credits — Free credits you can use across pay per use features.

Refresh — Configure settings to automatically recharge your account's payment method so you never have to worry about running out.



MY STAFF

In order to maintain your user account, you need to be able to manage your users. This includes editing their profiles, adding new members, and removing existing ones. Managing your users is an important aspect of maintaining your account. By editing their profiles, you can ensure that their information is up-to-date.

Adding new members to your account can help you expand your reach and grow your user base. On the other hand, removing existing members may be necessary if they are no longer active or if they violate your terms of service. With effective user management, you can keep your account organized and ensure that your users have a positive experience.

User Info Enter the user’s basic information, this determines their login credentials as well.

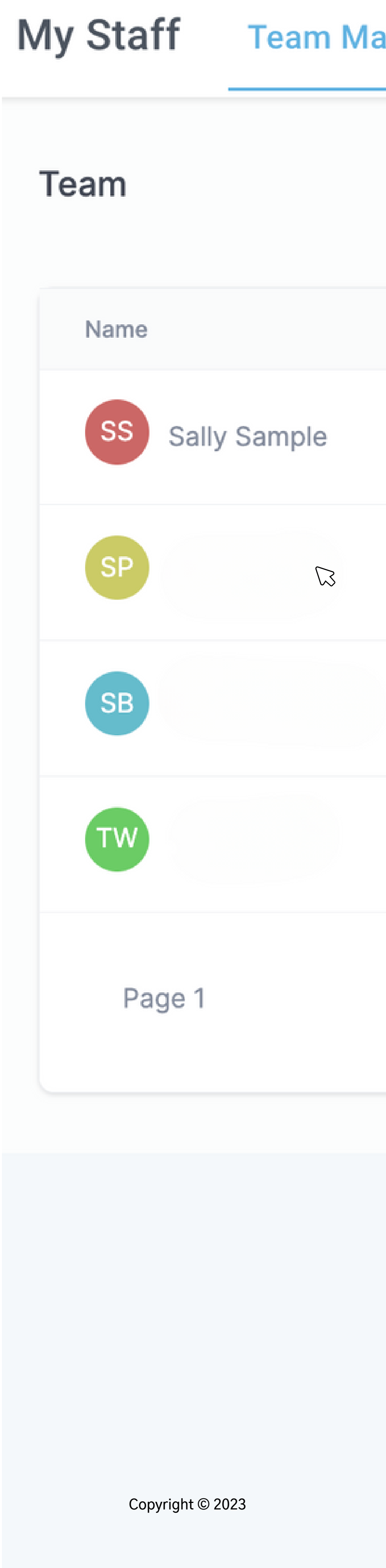
User Permissions Toggle which features, tools, or tabs the user has access to.

User Roles Choose which access level this user should have. Admins have more permissions than users.

Call & Voicemail Associate a phone number from your account with the user & set the voicemail

User Availability Configure the hours of each day that the user is available for work.

Calendar Configuration Configure which calendar integrations are associated with the user.



PIPELINES

To optimize your workflow and maximize productivity, it's essential to have a clear understanding of your process. Creating a visual pipeline is an effective way to represent your stages, contact activity, and identify potential roadblocks or areas for improvement. Pipelines are versatile and can be used for organizing leads, contacts, clients, lead value, sales, and more.

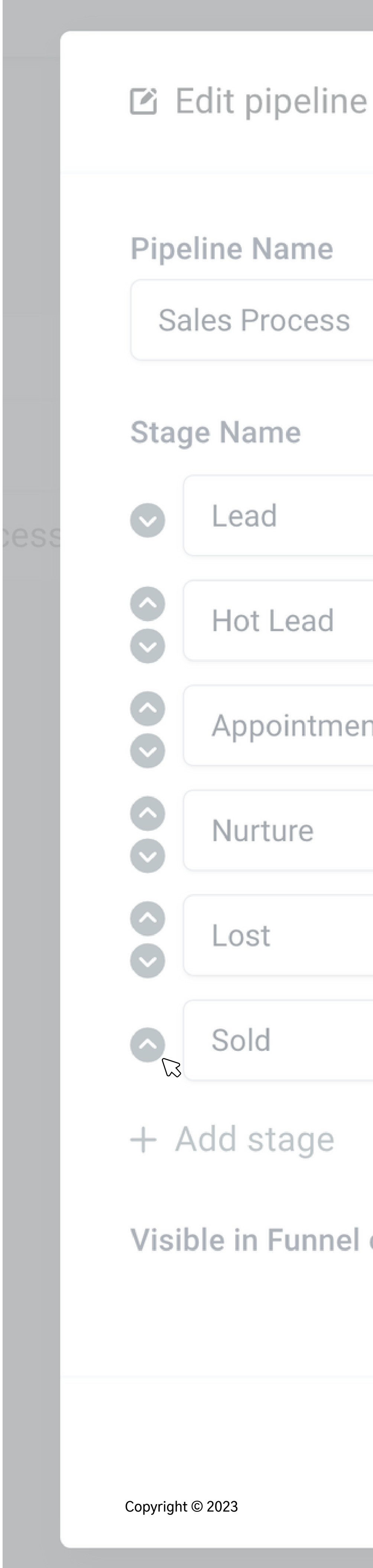
Moreover, integrating workflow automations can revolutionize your pipeline by automating updates and allowing you to track contact progress, activity, engagement, and more. With direct connection to your contacts, you can effortlessly manage and monitor your workflow from a single view.

Pipeline A business process broken down into a series of stages or steps.

Opportunity View your contacts as opportunities to make a sale. You can manage and track your progress by organizing them into "opportunity cards" and moving them through your pipeline stages.

Stage Your pipeline process has many stages, such as lead, hot lead, client, cancelled, and more. Each stage is crucial to advancing your sales and achieving your goals.

Status When it comes to the opportunity's status, you can choose from a range of options – lost, won, abandoned, or no-showed – to indicate what happened with the contact.



CALENDARS

With the ability to configure your user & calendar specific availability, you can easily customize your schedule to fit your needs. This means that you can select the days and hours that you want to make available for appointments, as well as the times that you want to block off for personal or business activities.

Creating new appointment types is also a breeze. You can set up different types of appointments depending on the services you provide, and even organize them into groups for easier scheduling. This makes it easier for your clients to find the right type of appointment and for you to manage your schedule.

Calendar A type of appointment that contacts can book.

Group Calendars are usually sorted by factors such as purpose, teams, or other categorizations.

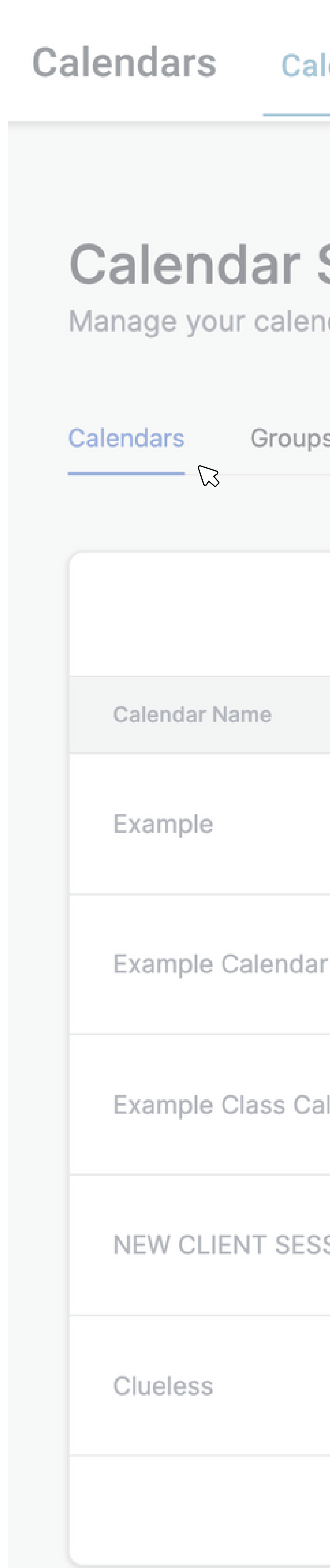
Simple Create this type of calendar for a one or more users quickly, worry about the more granular details later.

Collective This type of calendar permits the addition of multiple team members, enabling users to book appointments based on the availability of the entire team.

Round Robin This calendar type allows you to add user(s) and enables a contact to schedule a booking with one of the users according to their availability or priority.

Class Set up this calendar type for a specific date or time frame that enables your contacts to participate in a group meeting. You can even establish a seat limit!

Service This calendar type offers seamless scheduling for service businesses. It enables clients to schedule multiple services or appointments for several individuals.



CONVERSATION AI

Conversation AI offers two distinct modes, Suggestive and Auto Pilot, to help you manage your messages. By integrating an AI bot into your customer service, you can enhance engagement and satisfaction.

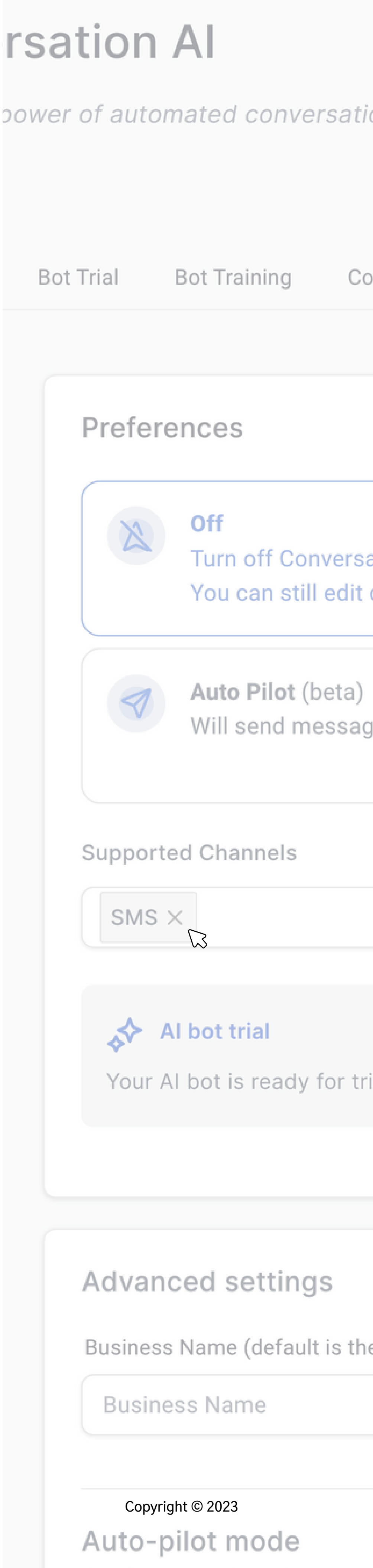
To fully optimize this feature, you should customize and configure the bot to suit your specific audience. This includes considering their unique needs and preferences and modifying the bot's responses accordingly. Doing so ensures that your bot provides accurate and useful information to your customers, potentially boosting sales and fostering brand loyalty.

Suggestive Mode

The AI bot will appear as a window while you type a response to a contact. This feature helps you personalize your message to the recipient and provides helpful suggestions for wording.

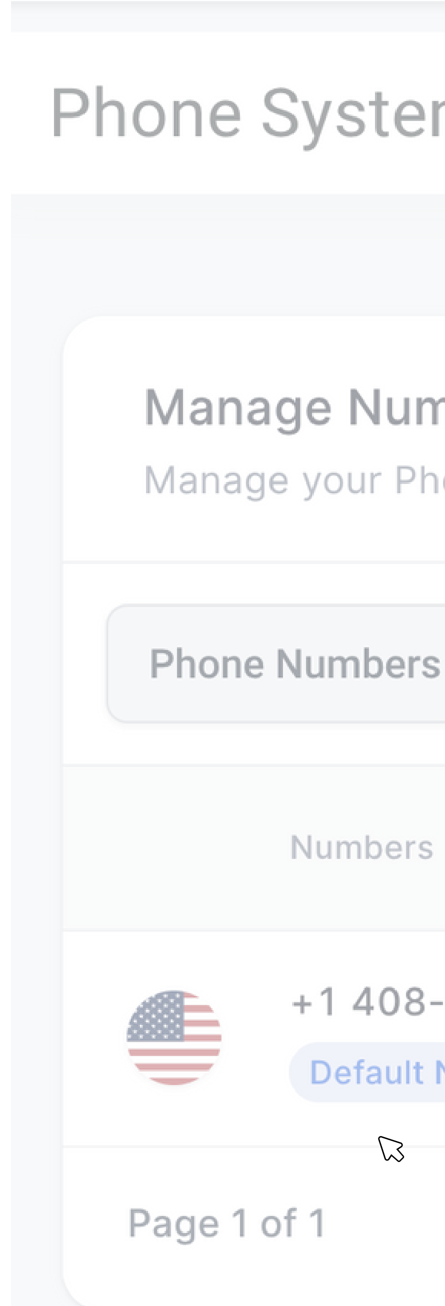
Auto Pilot Mode

Using the AI bot eliminates the need for manual intervention when responding to contacts. This saves you the hassle of having to stop and respond every time.



PHONE NUMBERS

Having the ability to manage and add phone numbers is essential for keeping your communication channels open and running smoothly. By connecting a phone number, you can easily add new phone numbers to your account, as well as manage existing ones. This allows you to stay on top of your communication needs and ensure that you are always reachable when you need to be.



Name — Give your new phone number a name that reflects its purpose, such as "Main Line" or "Sales Department."

Forwarding # — To redirect all calls to your preferred contact, provide a forwarding number such as your personal cell phone or business line.

Pass Caller ID — This invaluable feature ensures you can identify important business calls instantly.

Call Connect — Enabling this can improve call reporting and the missed call text back feature, despite requiring a keypress to connect the call.

Whisper Message — Enable this feature that plays internally to the call recipient, announcing the caller's name as "Call From {{contact.name}}" to help them identify the caller before answering.

Call Recordng — Enable this function to ensure that all incoming and outgoing calls are recorded for future reference.

Inbound — Determines how long a call will ring before forwarding to voicemail

Outbound — Sets the duration of ringing for outgoing calls.

WHATSAPP

We understand how important it is to have access to quick and reliable messaging services. That's why we offer lightning-fast messaging server integrations with Whatsapp. Get ready to experience the most affordable messaging solution on the market.

Our messaging servers offer real-time messaging without any delay. With high message volume capabilities, you can trust that your messages will be delivered promptly and efficiently. And the best part? Our pricing is affordable and won't put a dent in your budget. Don't hesitate--subscribe now to take advantage of this amazing deal and start enjoying fast and reliable messaging services today!

REPUTATION MANAGEMENT

By configuring the email, SMS, and site widget for the account, it becomes easier to request reviews from customers. This way, businesses can automate their review request process & make it more efficient.

The process involves pulling the configured email, SMS, and site widget into review request workflow steps and contact list actions. This means that businesses can easily make review requests through multiple channels, including email, SMS, and widgets. This not only saves time but also ensures that customers can leave reviews through their preferred channel, making the process more convenient for them.

Overall, configuring these channels is an essential step in creating a streamlined and effective review request process for any business looking to improve their online reputation.

Review Request

Send your contacts an email or SMS, pulling from this page, from various parts of the system. The most helpful ones are the the workflow action for automating requests & the bulk action button from the contact list page.

SMS Review Request

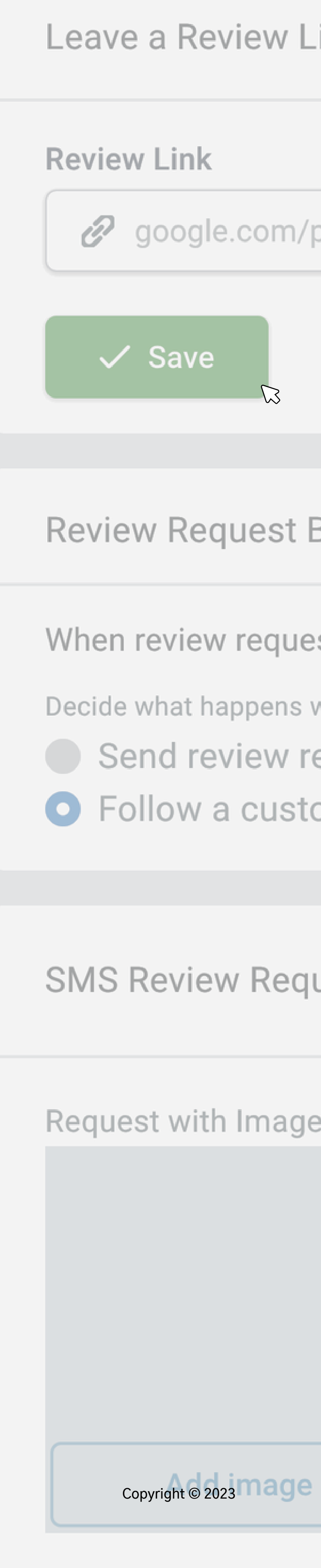
Customize the text message template the system uses to send the requests when you choose the SMS action or template.

Email Review Request

Customize the email message template the system uses to send the requests when you choose the email action or template.

Review Widget

Customize the look of the review slider widget that you can add to your funnel or website pages by dragging in the review element.



CUSTOM FIELDS

Easily create, edit, organize, and manage unique data fields that are specific to each contact in your account. This includes the ability to generate a variety of new fields such as drop-down menus, text boxes, and checkboxes, which can be consolidated into folders for quick and easy access later on. Better yet, you can even feature these fields in forms, surveys, messaging, and sites to share contact-specific information and create a more personalized automation experience.

By having a more comprehensive view of each individual's preferences, interests, and history with your company, you can tailor your marketing and communication strategies to be more effective. This can lead to increased engagement, higher conversion rates, and ultimately, more satisfied customers.

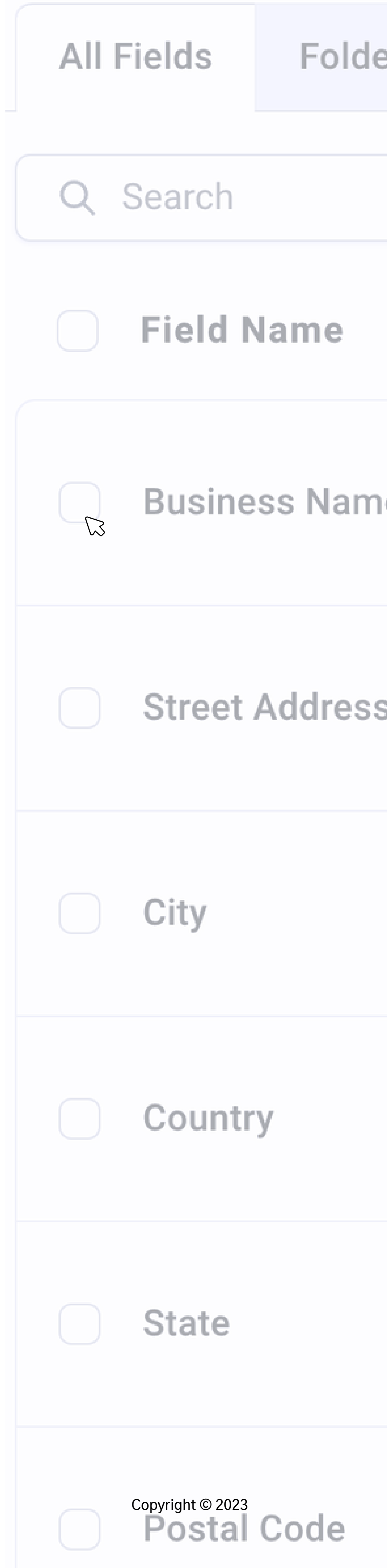
Field A designated location to arrange different data and uploads related to a specific contact.

Folder A compilation of personalized fields organized by purpose, project, form, survey, and more.

Field Type Choose whether this field is tied to the contact or opportunity pipelines

Placeholder An example of how to fill in the field is displayed in light grey.

Key The {{ }} code that can be used throughout the system to pull in the data from the field.



CUSTOM VALUES

One of the best features for creating dynamic information across various message templates, sites, and other places is the ability to create, edit, and manage custom data fields unique to each account (NOT each contact like custom fields).

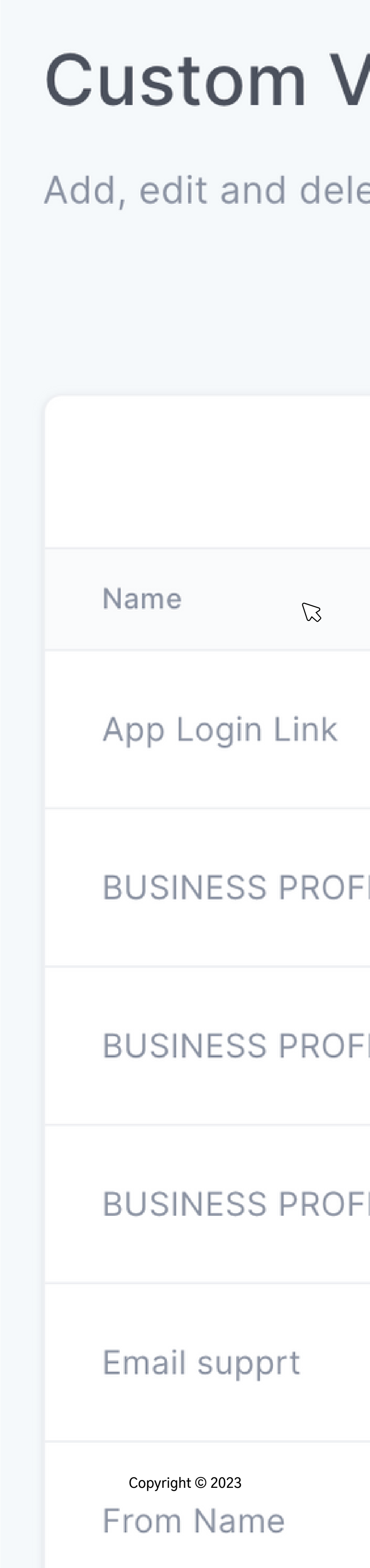
These fields allow you to update a key piece of information in one place and have it automatically updated throughout the system. This saves you the time and hassle of editing each one individually.

Custom data fields are also helpful for designing landing pages and messages with account details that may change frequently.

Name Assign an internal title to this field for simple identification when accessing messages, sites, and other components of the system.

Key The {{ }} code that can be used throughout the system to pull in the data from the field.

Value This field contains specific data that you determine. You can modify the value as needed, and any updates made will be reflected in all instances of this value within the system.



MANAGE SCORING

Measure how engaged contacts are with your platform is by using a predefined set of rules to create an Engagement Score. Use the score builder to add or subtract scores in a profile and publish it to make it live.

This Engagement Score can be a powerful tool for your business as it allows you to understand how invested your contacts are in your platform. By using a set of predefined rules, such as opening an email or visiting a certain page on your website, you can assign points to a contact's profile based on their actions. These points can then be tallied up to create an overall score that reflects the level of engagement of that contact.

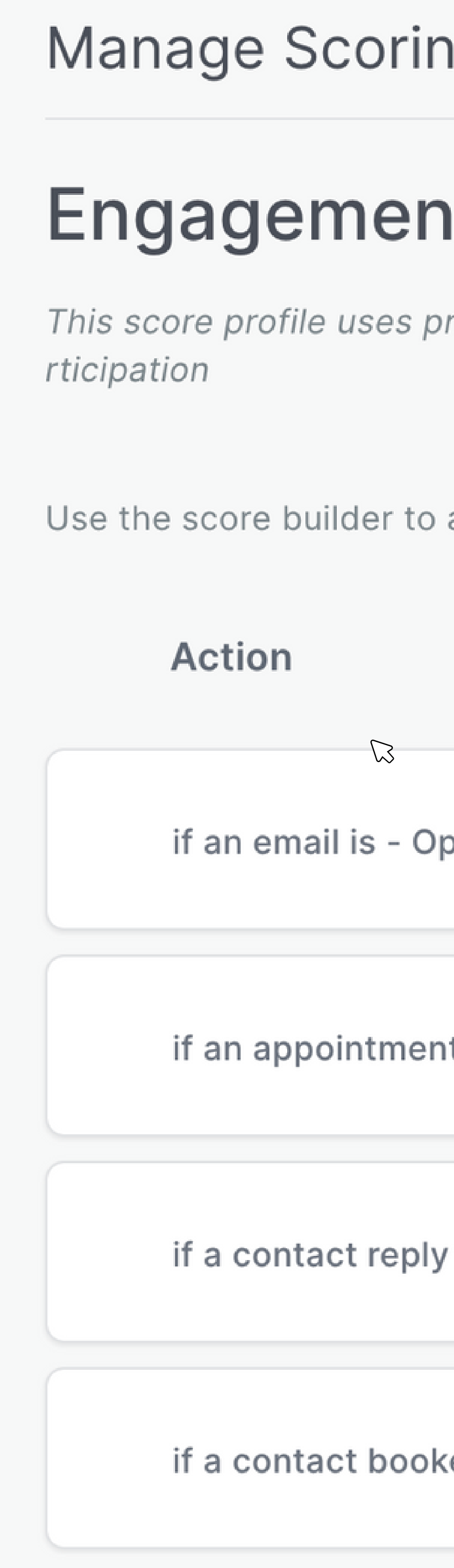
This means that you can begin tracking the engagement of your contacts in real-time and use this information to guide your marketing strategy. By understanding which contacts are highly engaged and which ones need more attention, you can create targeted automation tailored to the needs of each contact.

Rule Assigning a numerical value to a contact based on specific actions taken.

Action A contact's action or progression within the system.

Points A numerical value, either positive or negative, that can be assigned to certain actions and summed up to a total engagement score for each contact.

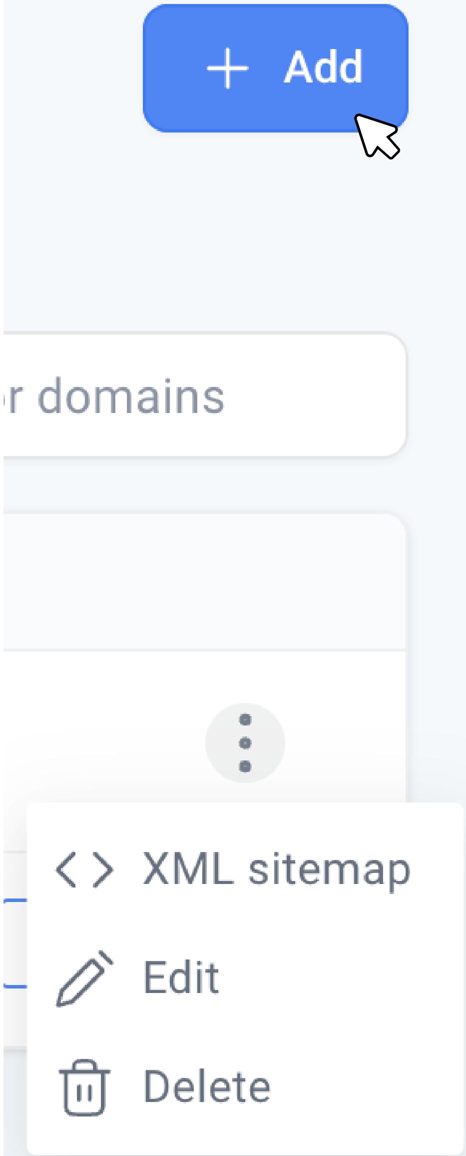
Score To assess how involved a contact is with your material, an engagement score is calculated based on their overall activity. This score represents the total number of points earned by the contact.



DOMAINS

Managing domains has never been easier with this user-friendly page. You can easily add new root or subdomains, view and edit existing ones, and even connect them to your funnels or websites seamlessly.

Plus, with the ability to set a custom 404 page, you can ensure that your visitors always end up in the right place, even if they mistype a URL.



Domain The items bought on platforms like Cloudflare or GoDaddy can be assigned to a specific site or funnel within the system.

Subdomain You can add a prefix to your root domain such as meetings, courses, or events, which is free to set up in your DNS settings. This prefix can be assigned to a whole funnel or site in the system.

Path To differentiate each site page, add a suffix to the path that relates to the page's content, such as meetings, courses, or events.

Direct Connect Integrate directly with your domain provider to add the required DNS records

Manual Connect Add your own DNS records to your domain provider

MEDIA

Having a centralized location for all media files can greatly improve the efficiency of content creation. With easy access to a wide range of media types, teams can quickly find and incorporate the right assets into their projects.

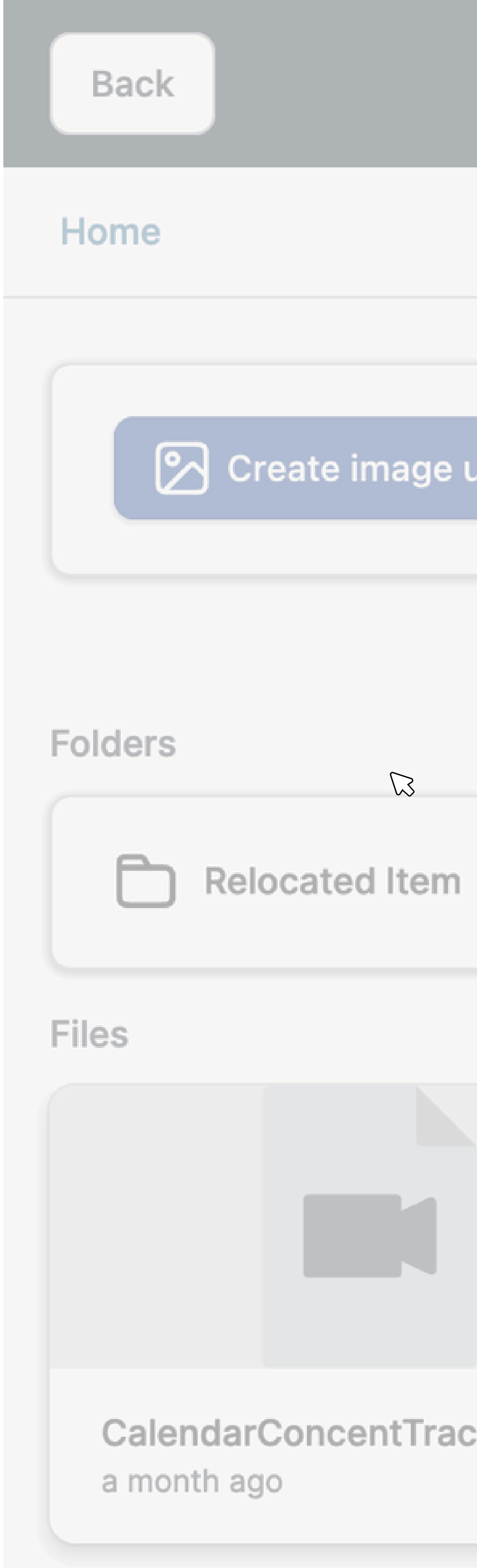
Additionally, managing media files from a single system helps to ensure consistency in branding and messaging across all channels. By organizing these files in a logical and easily navigable way, teams can save time and reduce the risk of errors when pulling assets into their work.

Overall, a well-managed media library is a valuable asset for any organization looking to streamline their content creation process.

Upload To add any necessary files, such as images, PDFs, or GIFs, simply click on the upload button located at the top right corner of the screen.

Folders To better manage your files, consider creating folders that are organized by purpose, brand or project type. This will help you stay organized and save time when searching for specific files.

Copy Link To share a particular file with clients, simply click on the file and click on the link icon beside the upload button. This generates a direct link you can use anywhere within the software to provide clients with access to the file.



URL REDIRECTS

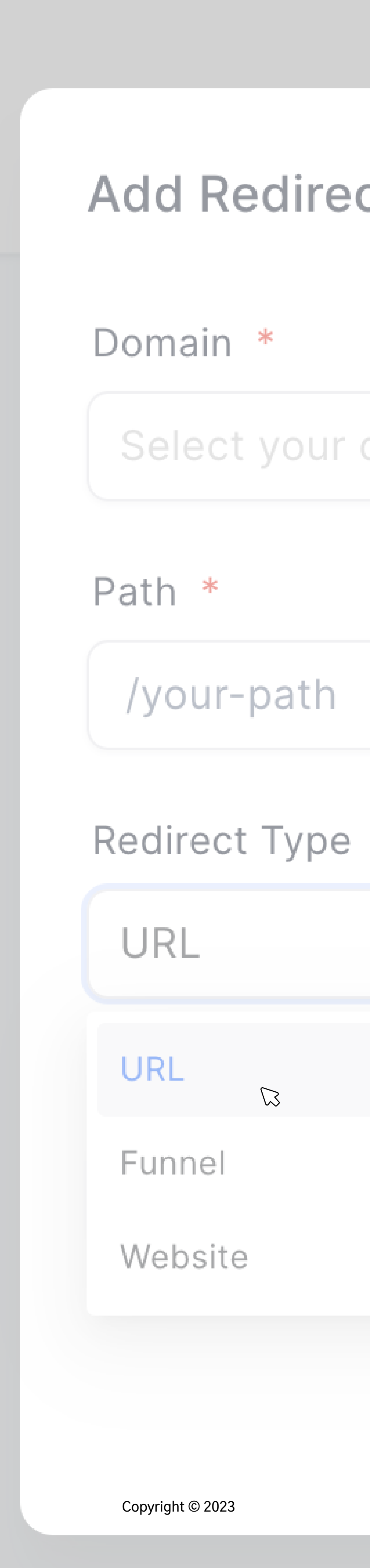
By using your connected domains, you can create custom paths and configure redirect links that will help your audience easily access relevant information.

This is particularly useful for businesses and individuals who want to streamline their online presence and make it easier for their customers or followers to find what they are looking for. With custom redirect links, you can also track engagement and analyze traffic patterns to better understand your audience and optimize your online strategy.

Domain — The items bought on platforms like Cloudflare or GoDaddy can be assigned to a specific site or funnel within the system.

Path — To differentiate each site page, add a suffix to the path that relates to the page's content, such as meetings, courses, or events.

Redirect Type — You have the option to choose where your URL will lead. You can direct it to a specific URL, a designated funnel page from your account, or a particular webpage from your account's website.



INTEGRATIONS

As a business owner, it's important to ensure that you have a strong presence across various digital platforms. This will not only help you reach a wider audience but also make it easier for potential customers to find and engage with your brand. Connecting with important platforms such as Google, Facebook, Instagram, Tik Tok, and more will help you do just that.

Google and Google My Business are essential for showing up in search results and maps. Facebook and Instagram Business Pages, as well as messaging, are great for building a community and engaging with your audience.

By connecting with these platforms & others, you can ensure that your business is easily discoverable and that you're able to provide the best possible experience for your customers.

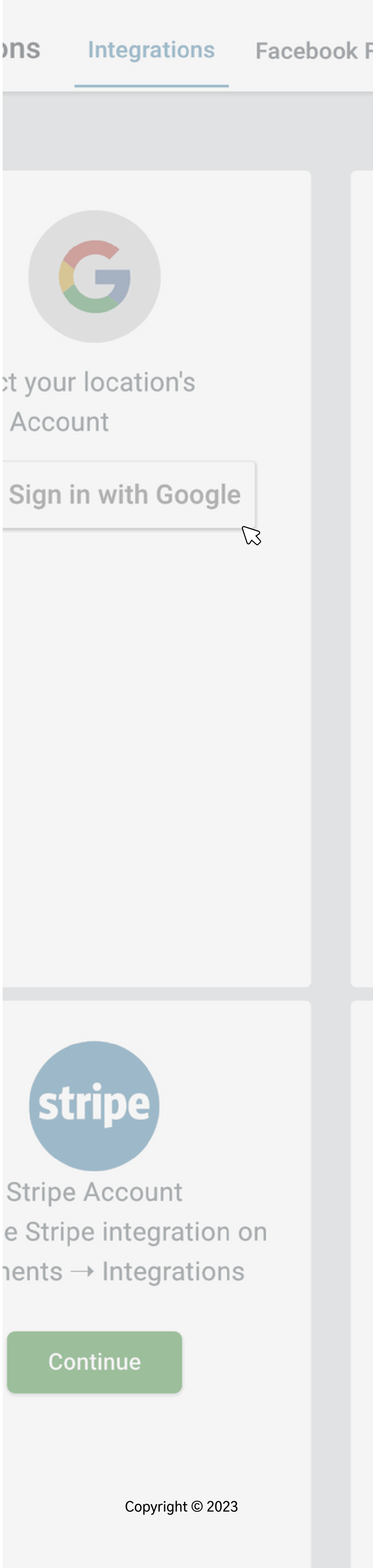
Account Integrations Connect with account level integrations like FB, IG, or TIk Tok Business pages.

User Integrations Connect with user level integrations like calendars & Zoom.

Social Integrations Connect with FB, IG, GMB, Linkedin, and other social platforms to sync posting & analytics.

Calendar Integrations Connect with Google, Outlook, or iCal to sync user availability

Payment Integrations Connect with Stripe, PayPal, NMI, or Authroize.net to collect & distribute payments.



EMAIL SERVICES

Having a custom domain for your business email address can make a significant impact on your brand's professionalism. Not only does it look more professional, but it also adds a layer of credibility to your business. By connecting directly with a custom domain, you can have a unique email address that represents your brand and helps you stand out from the competition.

In addition, managing account level email forwarding and BCC syncing settings can make your communication more efficient and organized. With email forwarding, you can automatically forward emails to another email address, saving you time and effort. BCC syncing allows you to track all the emails sent from your account and keep your team in the loop.

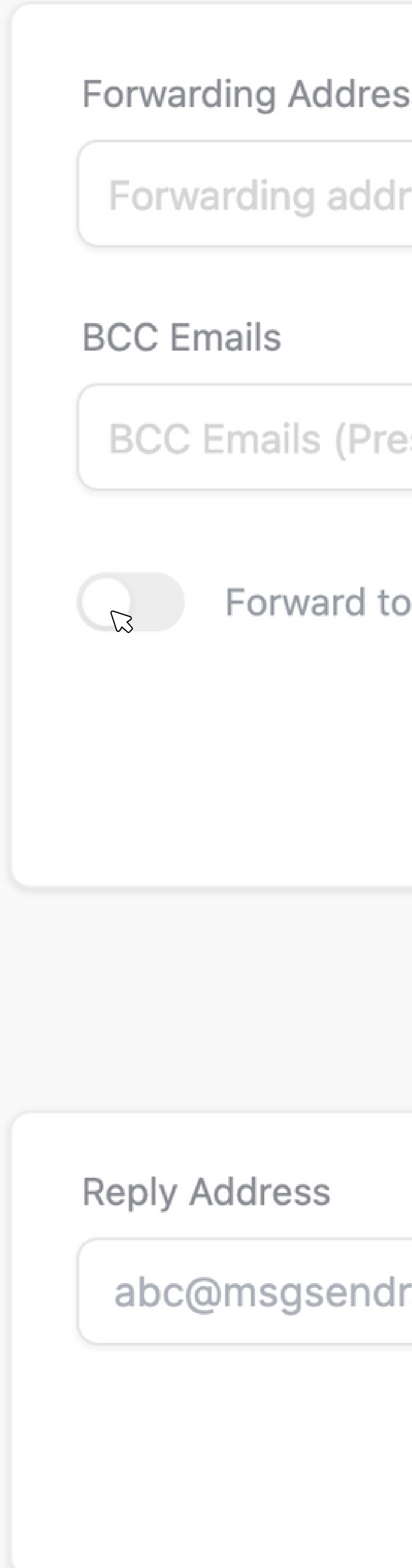
LC Email — Our system can easily link up with your domain to facilitate the setup of your very own custom domain.

Custom SMTP — Manually set up your email domain connection by integrating your SMTP.

Forwarding — Specify one or multiple email addresses that should receive a copy of all incoming emails in the system.

CC & BCC — To add additional contacts to an email thread, simply include their addresses in the outgoing email replies as CC or BCC.

Reply Address — Please provide an email address to which replies for email threads within the system should be sent.



CONVERSATION PROVIDERS

If you’re looking to manage your conversation custom providers, you can view the list of providers that have been added to your account by clicking on the link provided. This will give you an overview of all the custom providers that have been added, as well as any relevant information about each provider.

Managing your conversation custom providers is an important part of ensuring that your messaging service is optimized for your business needs, and having access to this list makes it easier than ever to stay on top of your messaging strategy.

TAGS

Custom tags are a powerful tool to help you stay on top of your contacts and ensure that you have the right information at your fingertips. By using tags effectively, you can quickly filter your contacts by specific criteria and easily find the information you need. For example, if you want to contact all of your clients who are tagged “active client”, you can simply filter your contact list by that tag and send a targeted message.

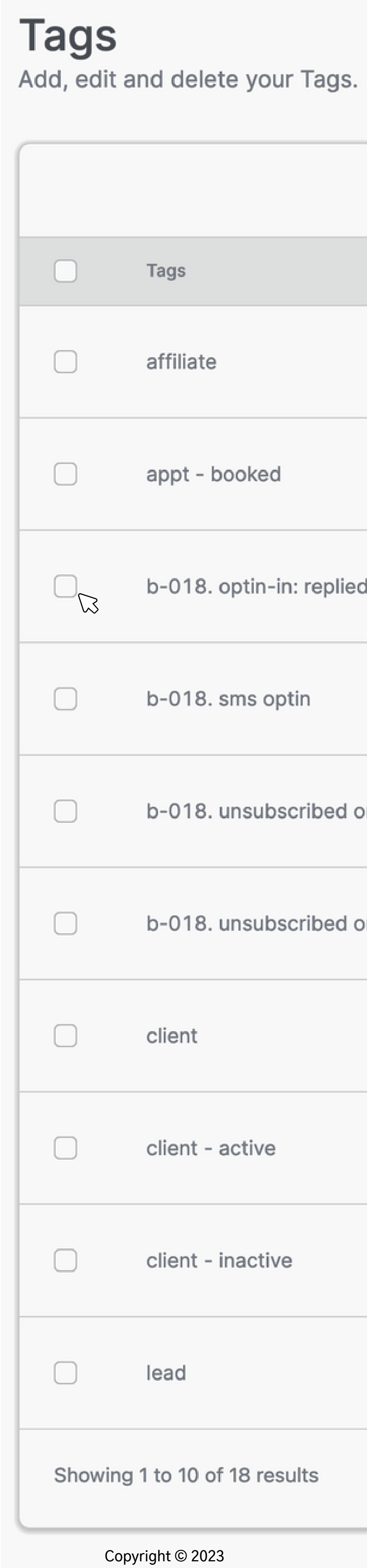
In addition, saved smartlists allow you to automate your marketing efforts and ensure that you are reaching out to the right people at the right time. With custom tags, you can take control of your contact management and streamline your processes for greater efficiency.

Tag Assigning a particular label to a contact is a way to categorize them with specific pieces of information.

Adjust Columns Take advantage of the Columns dropdown to personalize which data fields are visible in your list. You can even sort your list by these columns. Plus, if you decide to export your list, these columns will be included or excluded based on your preferences.

Filter Contacts Use the More Filters button to add one or more specific sets of criteria to show specific lists of contacts.

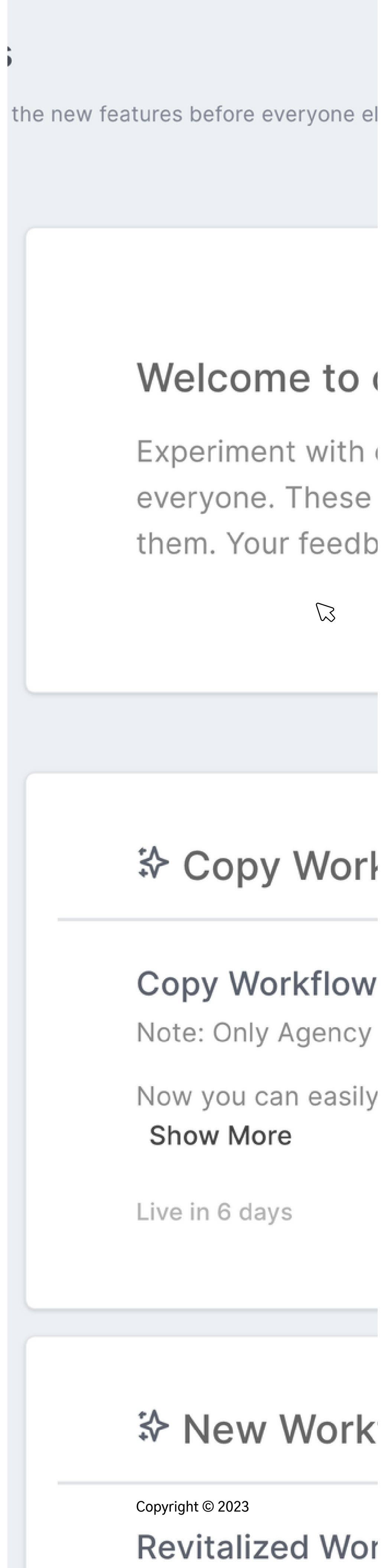
Save Smart List After adding one or more filters to your list, you can save it as a smartlist to easily access it later. This is helpful for lists you engage with often & will auto update as contacts fall in our out of your set filters.



LABS

View & enroll in features that aren't yet released to get a sneak peek. Being an early adopter of new features can be exciting and give you a competitive edge. With many tech companies constantly seeking to innovate, you can stay ahead of the curve by taking advantage of opportunities to view and enroll in features that aren't yet released.

By doing so, you can get a sneak peek at what's to come and be better prepared to take advantage of new tools and capabilities. This can be particularly useful in the business world, where staying on top of the latest trends and technologies can help you stand out from the competition and succeed in your industry.



AUDIT LOGS

As a user of our contact management system, you can easily keep track of all updates and changes made to your contacts and related information. Our system allows you to view a comprehensive log of any modifications made to a contact, company, opportunity, note, task, custom value, tag, calendar event, LC communication, Wordpress, agency, custom field, payment, conversation, invoice, lost reason, document or marketplace in the last 60 days.

This feature provides you with a clear understanding of the changes made to any aspect of your contact management system and ensures that you always have the most up-to-date information at your fingertips. With this valuable tool, you can stay on top of your contacts and make informed decisions based on the latest information available.

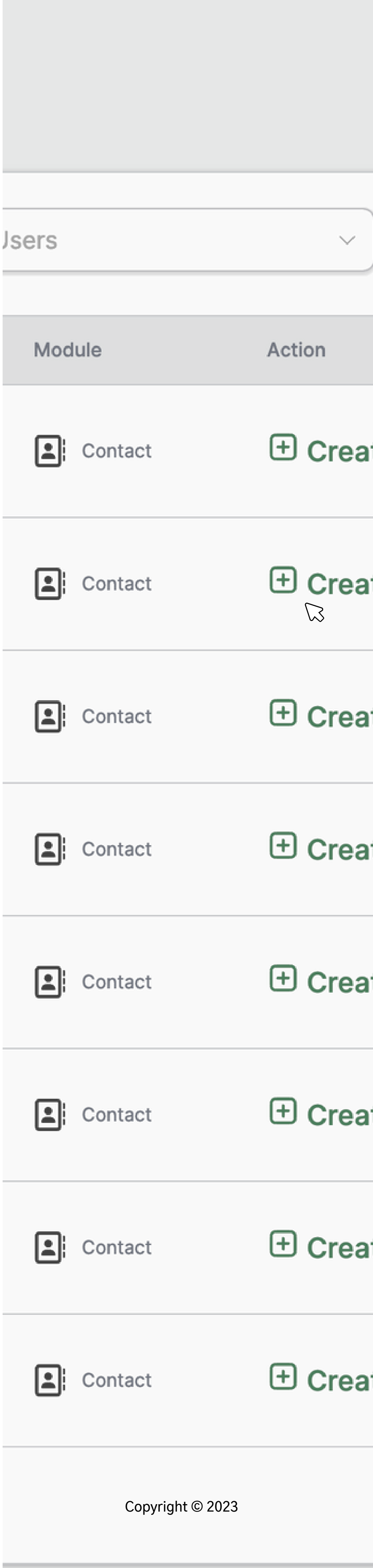
Name The contact that the modification was applied to.

Module Identify the location or feature in the software where the modification was performed.

Action The alteration that occurred.

Done By The individual responsible for the alteration.

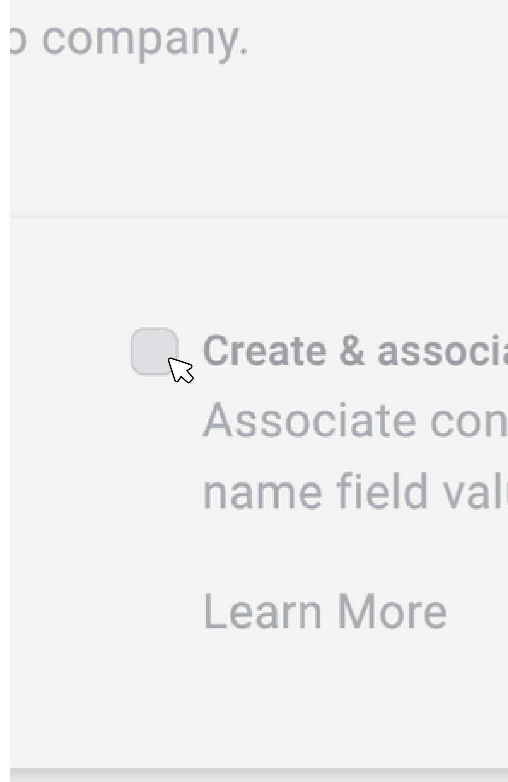
Date & Time The timestamp indicates when the modification occurred.



COMPANIES

Grouping contacts based on the company name field can be a useful organizational tool, especially if you have a large number of contacts from various companies. By enabling this feature, the system will automatically group contacts with the same company name, making it easier to locate and manage them.

However, if you prefer to organize your contacts in a different way or if you have contacts from the same company with different names, you may want to consider disabling this feature. Ultimately, the decision to use this feature should be based on your unique needs and preferences.



Contact In your account, there is a designated individual that contains their personal information such as their name, address, job, company, form submissions, and much more.

Company To group contacts with the same company name, simply fill in the Company field for each contact record or manually assign them.

NEED MORE HELP?

CHECKOUT OUR SUPPORT OPTIONS & RESOURCES

Our team is fully dedicated to supporting you every step of the way, ensuring your success. You can review the wide range of resources and support options available to guide you through any challenges or inquiries. Don't hesitate to reach out to our team whenever you need additional assistance; we're always here to help!

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ALL INFORMATION IS SUBJECT TO CHANGE AS THE SOFTWARE UPDATES AND GROWS. NEW VERSIONS OF THIS WORKBOOK WILL BE EDITED FOR UPDATES AND NEW FEATURES.