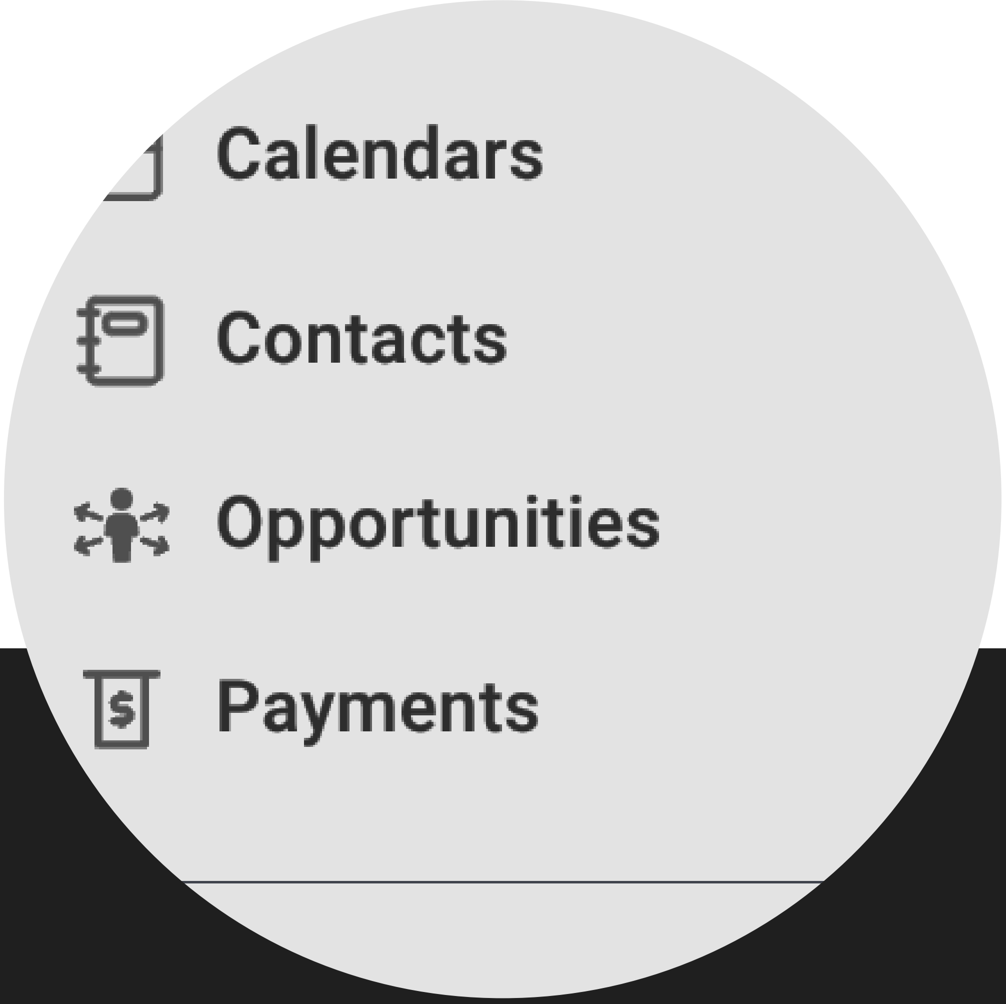
YOUR ACCOUNT
FEATURES & TOOLS



November 2023

ACCOUNT FEATURES OVERVIEW

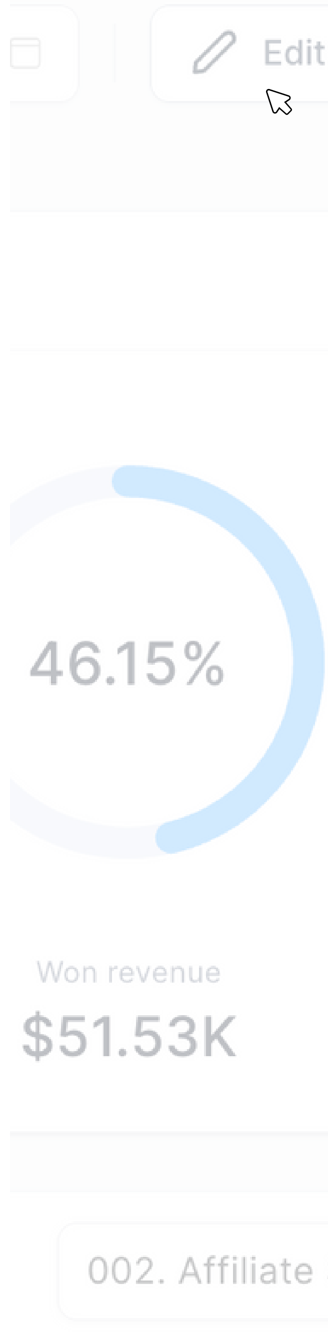
Feature	Description
Dashboard	View all account analytics & statistics across the various features
Conversations	View all incoming messages, regardless of channel, in order to easily manage & reply to them
Contacts	View all of your customers & data, save smartlists, manage tasks, execute one off actions, and more
Calendars	Create custom appointment types & organize them into groups of your choice
Mobile App	Download our app on your devices to eaily manage conversations, opportunities, appointments, and other features on the go
Automation	Create detailed workflows that execute off of customized triggers and fire off specified actions that you set
Opportunities	Track your contacts through your specified process pipelines like sales, onboarding, etc
Payments	Connect to Stripe or Paypal to create products, prices, coupons, and manage payments internally
Proposals & Estiamtes	Manage and oversee all proposals and estimates created for your account and send to clients
Forms & Surveys	Collect data & information from your contacts by designing a one page form or multi-page survey, even pull in custom fields you created to customize it
Social Media Posting	Integrate with your social media accounts to schedule & manage posting manually or by uploading a file
Funnels & Websites	Design & launch custom site pages through funnels or websites which you can directly pull forms, surveys, calendars, and more into your page
Email Builder	Create beautifully formatted emails with columns, buttons, files, and more in order to send directly or pull into a workflow email
Affiliates	Create referral campaigns from your funnel or website pages in order to create unique affiliate URL's & track commissions
Blogs	Write & design beautiful blog posts that automatically update on any site page you have the blog post element pulled into
Memberships	Create courses, resource libraries, and other products that you can offer to your customers & brand the portal to your company or client
Chat Widget	Customize the chat widget to your brand & connect to your funnels, websites, or external sites by using the code provided by the system
Settings	Opens the settings screen where you can edit, customize, and control various business info, profile info, staff, permissions, and a ton of other key processes
Reviews	Connect to your FB & GMB pages to automatically request reviews, automate them, manage, and more!
AI	For a small fee per use, you can use the power of AI writing, images, and captions for your business
Reporting	View analytics such as calls, appointments, attributions, agent, and other statistics
Communities & Client Portal	Create an engaging group in your membership area to communicate with clients, leads, and other contacts as well as allowing affiliates & members to view their activity in their client portal
Lead Scoring	Create rules based on actions that your contacts may take to add or subtract points to show how engaged they are

DASHBOARD

With our platform, you can easily access and view the analytics and statistics across various features. Keep an eye on your pipeline opportunities, including where they are, how many you have closed, the revenue you've generated, lead source lists, and more. **As you continue to use your account, the system will accumulate more data which will be reflected back to you in a way that will assist you in improving your business.**

Our tracking system is designed to provide you with comprehensive insights into your account performance, allowing you to make informed decisions about your business strategy. Whether you need to identify areas for improvement, track your team's progress, or measure the success of your marketing campaigns, our platform has got you covered. With easy-to-use dashboards and customizable reports, you can quickly access the data you need to stay ahead of the competition.

Plus, our system is fully integrated with your existing tools and workflows, so you can seamlessly incorporate it into your daily operations. Start tracking your account analytics and statistics today and take your business to the next level!

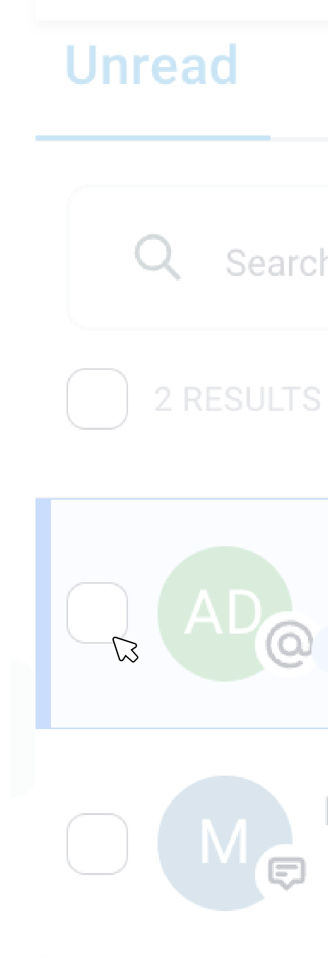


CONVERSATIONS

In today's fast-paced world, staying on top of one's communications can be a daunting task. With messages coming in from various channels such as email, SMS, social media, and more, it can be easy to lose track of important conversations. Fortunately, there are tools available that can help streamline communication management.

One such tool is a unified inbox, which allows you to view all incoming messages, regardless of the channel they came from, in one centralized location. This not only helps you to organize your communications, but also allows you to reply to messages more efficiently. With our conversations tool, you no longer have to waste time switching between different apps or platforms to check your messages. Instead, you can see all your messages in one place, making it easier to prioritize and respond to them in a timely manner.

In addition to simplifying your communication management, you can also help you stay on top of customer service inquiries, sales leads, and other important messages. By having all your messages in one place, you can quickly identify which ones require your immediate attention, and which ones can wait. This can help you improve your response times and provide better service to your customers.



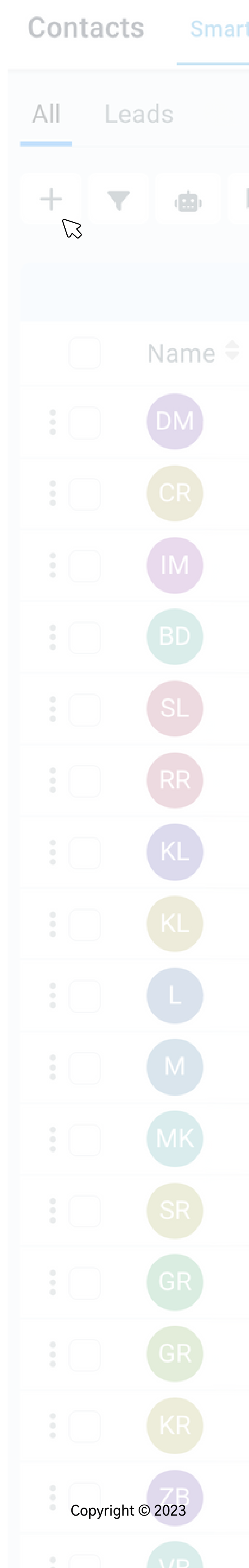
CONTACTS

As a business owner, it's important to keep track of your customers and their data to ensure that you're providing the best service possible. With our Contact Management System, you can easily view all of your customers' information in one place, allowing you to make informed decisions about your business.

In addition to this, saving smartlists can help you locate & engage with specific groups of customers for marketing campaigns, promotions, and other initiatives. By organizing your data in this way, you can save time and resources while still achieving your business goals.

Managing tasks is another crucial aspect of running a successful business. With so much to do on a daily basis, it can be easy to overlook important tasks or forget about deadlines. By using the task tab, you can stay organized and ensure that everything gets done on time.

Finally, executing one-off bulk actions can help you take advantage of opportunities as they arise. Whether it's sending a personalized message to a customer or offering a special promotion, being able to act quickly can make all the difference in the success of your business.



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 calendar and 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.

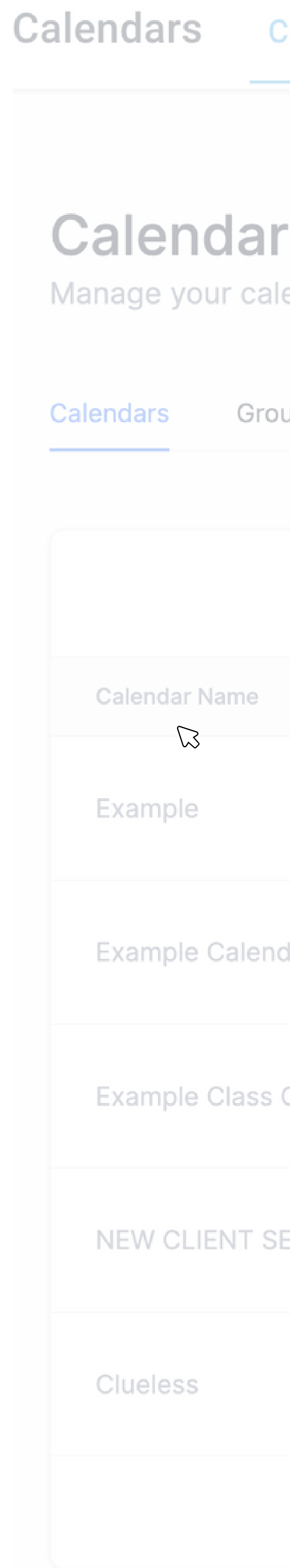
Simple Create this type of calendar for a one or more users quickly, worry about the more granular details later.

Collective This type of calendar permits the addition of team members, enabling users to book 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 scheduling for service businesses. Clients can schedule multiple services or for several individuals.



MOBILE APP

Download our app on your devices to easily manage conversations, opportunities, appointments, and other features on the go.

With our app, you'll never have to miss a beat when it comes to managing your day-to-day tasks. Whether you're on the train during your morning commute, waiting in line at the grocery store, or taking a break at work, you can easily access all of your conversations, opportunities, appointments, and more right from the palm of your hand.

The app is designed to make your life easier by providing you with a seamless experience. You can set reminders for important events, schedule appointments, and keep track of all your tasks in one place. The app's user-friendly interface allows you to quickly and easily navigate through all its features.

Plus, our intuitive user interface makes it easy to navigate and stay organized, so you can focus on what really matters. So why wait? Download our app today and start managing your life on the go!

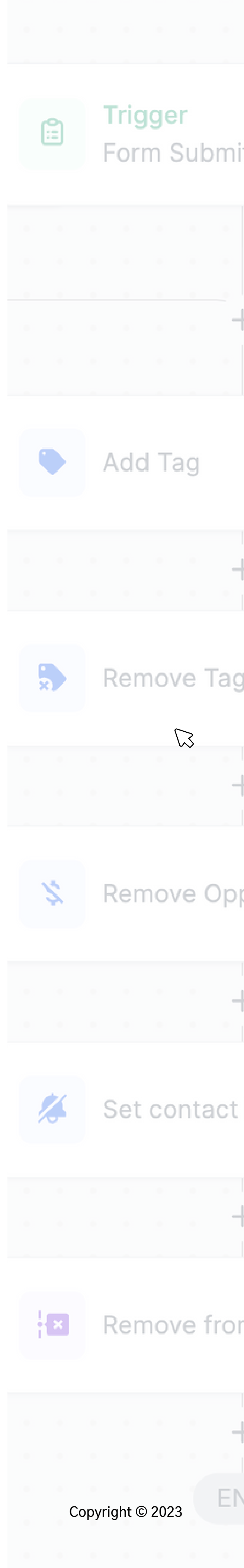
AUTOMATION

One of the most crucial elements of your business's success is the creation of detailed workflows that execute based on customized triggers, firing off the specified actions that you set. This automation of repetitive tasks is the backbone of your account and business, freeing up time for you to focus on the core of your operations. Why waste time answering emails or manually following up with scores of contacts when you can automate those tasks and concentrate on new leads?

Customized triggers allow you to create workflows that meet the specific requirements of your business. These workflows can automate any recurring task, enabling you to prioritize other important aspects of your business. By automating these tasks, you can become more efficient and effective in your work, from responding to emails to following up with contacts.

Automation helps you predict outcomes and plan your day, reducing stress in the process. With customized workflows, you can automate tasks that might have previously taken hours, freeing up your time to generate new leads and expand your business.

Most importantly, customization is the key to successful automation. With the option to create a custom workflow that feels familiar to you, you can easily automate tasks without sacrificing quality or efficiency. By taking the time to set up a customized workflow, you can streamline your business operations and achieve greater success in less time.



OPPPORTUNITIES

To boost productivity and streamline workflows, it's crucial to have a clear understanding of your process. Consider creating a visual pipeline with contact opportunity cards that effectively represents your stages, contact activity, and identifies any potential roadblocks or areas for improvement. Pipelines are versatile and can be used for organizing leads, contacts, clients, lead value, sales, and more.

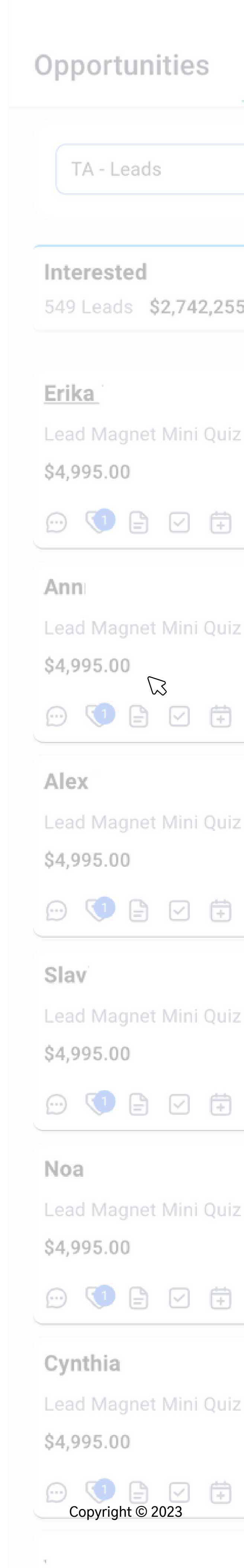
By integrating workflow automations, you can take your pipeline to the next level. Automations can update your pipeline automatically and help you track contact progress, activity, engagement, and more. With direct connection to your contacts, you can effortlessly manage and monitor your workflow from 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.

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.

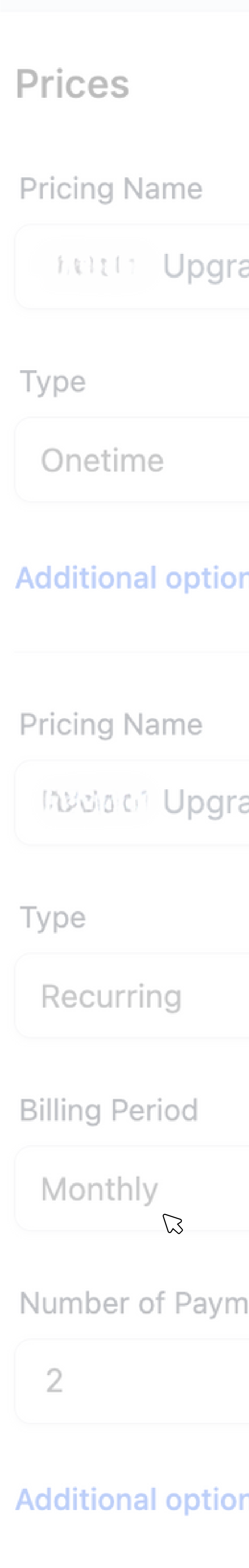


PAYMENTS

Connecting your Stripe, Paypal, NMI, or Authorize.net account to your system has never been easier! By doing so, you unlock the ability to not only create and manage products, prices, and coupons, but also to streamline the payment process for your customers. No longer will you need to manually handle payments from different sources – everything will be consolidated into one account.

Additionally, by linking your products to other features in the system like invoices, sites, and order forms, you can create a truly holistic experience for your customers. This means that they can seamlessly navigate between different parts of your business without ever feeling like they are being redirected to an external platform. With memberships and landing pages also integrated, you can ensure that your customers are able to fully engage with your offerings in a way that is intuitive and easy to use.

So why wait? Connect your payment processing account today and start enjoying all the benefits that come with a fully integrated payment system!



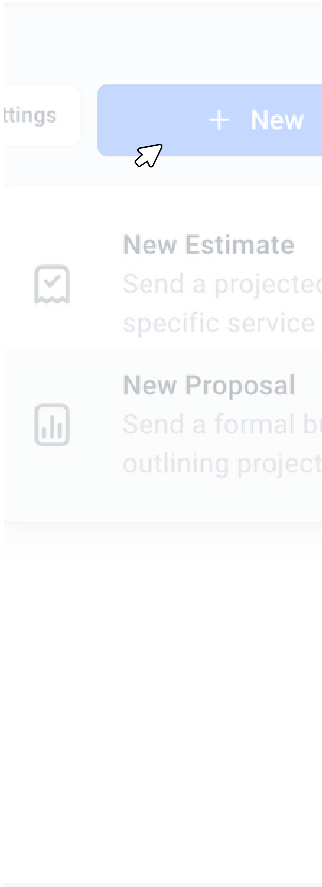
PROPOSALS & ESTIMATES

Manage and oversee all proposals and estimates created for your account and send to clients. Send them project quotes, terms, ideas, and have them sign off with their approval!

As a manager or business owner, it’s essential to keep a close eye on the proposals and estimates created for your account. This ensures that all project quotes and terms are accurate, and that clients are receiving the best possible service. By managing and overseeing these proposals, you can ensure that they align with your company’s goals and vision.

Once you have created a proposal or estimate, it’s important to send it to the client in a timely manner. This can be done via email or through a project management system. Make sure to include all relevant details, such as project scope, timeline, budget, and any other important information.

Finally, it’s crucial to have clients sign off on the proposal or estimate to ensure that everyone is on the same page before beginning work. This not only protects your company, but also helps to establish trust and transparency with your clients.

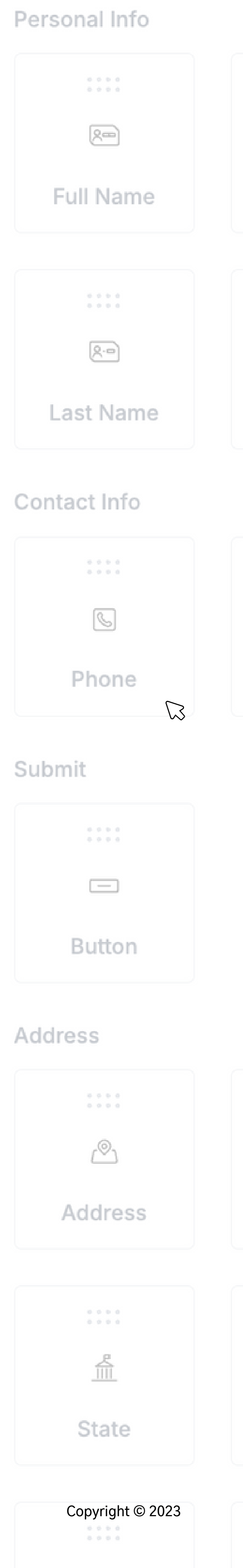


FORMS & SURVEYS

Designing a one-page form or multi-page survey is an excellent method for collecting essential data and information from your contacts. The option to customize fields allows you to tailor your questions to gather the necessary data you need. Once the form or survey is submitted, answers will be saved in the contact record and under the submissions tab. You can use this data to personalize your messaging and improve the user experience. By gathering and utilizing this information, you can better understand your audience and provide them with more targeted and effective communication.

There are many different types of forms and surveys that you can create depending on the information you need to collect. For example, if you want to collect feedback on a recent event or product launch, you can create a survey with multiple choice questions and open-ended response fields. On the other hand, if you want to conduct a job application process, you can create a form that includes fields for personal information, education, work experience, and references.

Overall, creating custom forms and surveys is an effective way to collect data and information from your contacts and better understand your audience. By using the data to personalize your messaging and improve the user experience, you can build stronger relationships with your customers and achieve your business objectives.



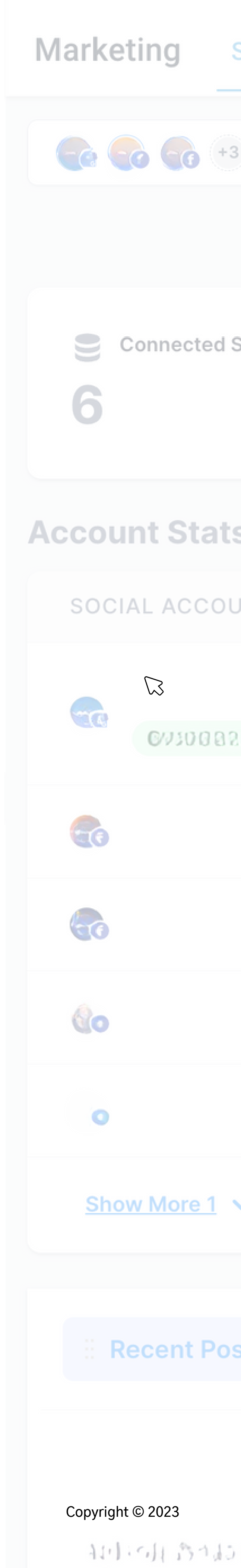
SOCIAL MEDIA POSTING

Managing social media can be time-consuming, but with the right tools, it doesn't have to be. By integrating your social media accounts with a scheduling and management tool, you can easily create and schedule posts across multiple platforms. Whether you want to post manually or upload a file, you can customize which accounts to post on and schedule posts ahead of time. This is particularly useful if you're trying to maintain a consistent brand image across all of your social media channels.

Integrate with your social media accounts to schedule & manage posting manually or by uploading a file. You can create groups of accounts for specific posts, customize which accounts to post on, and even schedule posts ahead of time! Not only can you manually create posts or upload a file, you can also pull from templates & RSS blog feed to automatically posts when new articles are published.

What's more, you can also use templates and RSS blog feeds to automatically post when new articles are published. This can save you even more time and ensure that your followers are always up-to-date with your latest content.

By taking control of your social media with a scheduling and management tool, you can free up time to focus on other important aspects of your business.



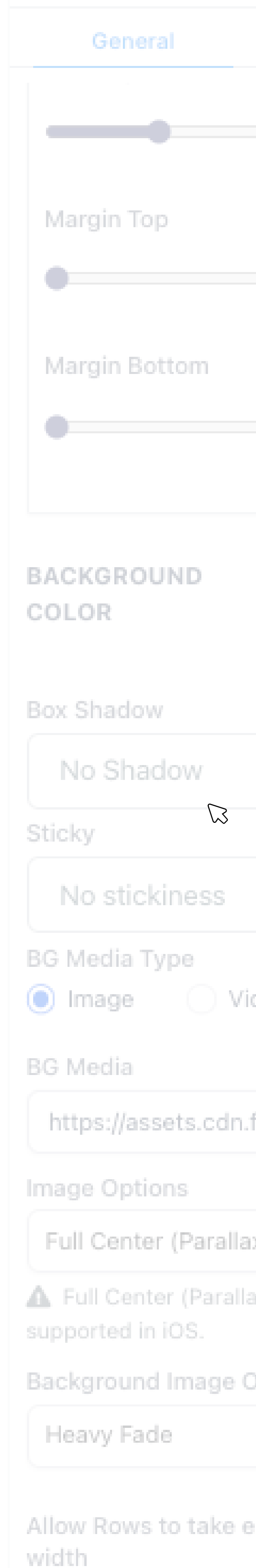
FUNNELS & WEBSITES

Businesses today require a strong online presence to keep up with the competition. This is where the ability to design and launch custom site pages seamlessly comes in. With this feature, integrating forms, surveys, calendars, and products into site pages becomes a breeze. Customers can easily access the information they need, making purchases and bookings with ease. This not only enhances customer satisfaction but also streamlines business operations, making it more efficient and cost-effective.

Moreover, this feature comes with an easy-to-use interface that allows businesses to manage and track customer interactions with ease. By pulling data from forms and surveys, businesses can gain valuable insights into their customers' needs and preferences. This information can then be used to tailor marketing strategies and improve overall customer experience. Integration with calendars and booking systems makes scheduling appointments a breeze, which reduces the risk of double bookings or missed appointments.

Another advantage of designing and launching custom site pages is that it allows businesses to optimize their site for search engines. By incorporating search engine optimization (SEO) techniques into their site pages, businesses can improve their visibility and ranking on search engine results pages. This makes it easier for potential customers to find them online, which can lead to increased traffic, conversions, and revenue.

In summary, the ability to design and launch custom site pages through funnels or websites is a game-changer for businesses that want to establish a solid online presence and streamline their operations. This flexible and powerful tool is a must-have for businesses that want to stay ahead of the competition.



EMAIL BUILDER

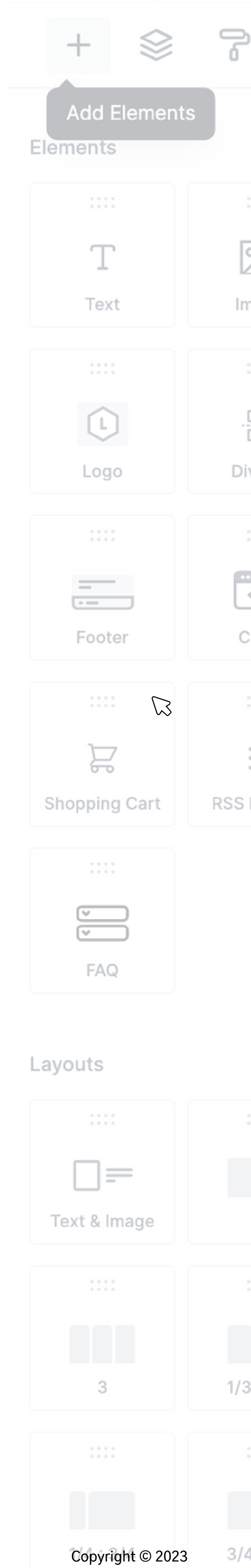
Whether you want to send emails directly or incorporate them into your workflow, you can create beautifully formatted emails that include columns, buttons, files, and more. Schedule RSS feeds, newsletters, and other visually striking emails to reach out to your contacts.

The process of crafting stunningly designed emails with columns, buttons, and attachments is made easy with the right tools and resources. There are various email marketing platforms and software available that allow you to create visually appealing emails that can grab the attention of your target audience.

By incorporating columns, you can create a more organized and structured layout for your email content. This can help to make the information more digestible and easier to navigate for your readers. You can also add buttons to your emails, which can be a powerful way to encourage your readers to take action, such as clicking through to your website or making a purchase.

Another key feature of modern email marketing is the ability to include attachments, such as images, videos, and files. This can help to bring your message to life and make it more engaging for your readers. With the ability to schedule your emails in advance, you can ensure that your contacts receive your newsletters and other communications at the optimal time for maximum impact.

Overall, by leveraging the power of columns, buttons, attachments, and scheduling, you can create beautifully formatted emails that are sure to capture the attention of your audience and drive engagement with your brand.



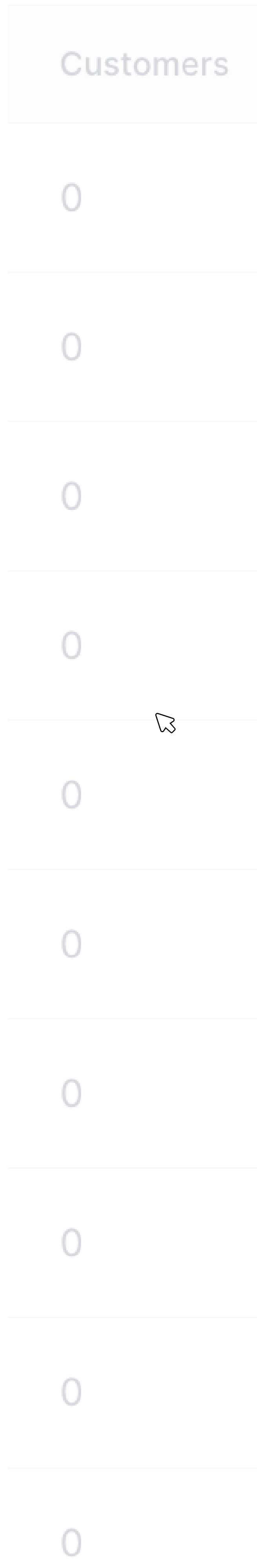
AFFILIATES

Create referral campaigns from your funnel or website pages in order to create unique affiliate URL's & track commissions. By being able to automate your affiliate registration, adding to campaigns, and generally managing your affiliates you never have to worry about having too many people promoting you. Having a referral program can be a great way to incentivize your customers or website visitors to promote your products or services. By creating unique affiliate URLs, you can track the commissions earned by each affiliate, making it easier to manage and reward them accordingly.

Automating the affiliate registration process and adding them to campaigns can help streamline the process, so you don't have to worry about managing too many people. With the help of a client portal, your affiliates can easily track their own commissions, making it a win-win situation for both you and your affiliates. So if you're looking to expand your marketing efforts, consider setting up a referral campaign today!

One of the key benefits of referral campaigns is the ability to track commissions earned by each affiliate through unique affiliate URLs. This allows you to reward your affiliates accordingly and manage the program more efficiently. Automating the affiliate registration process and adding them to campaigns can also help streamline the process, making it easier to manage a large number of affiliates.

With the help of a client portal, your affiliates can easily track their own commissions and stay motivated to promote your offerings. So if you're looking for a cost-effective way to increase your sales and drive more traffic to your site, consider setting up a referral campaign today!



BLOGS

Blogging is a great way to establish yourself as an authority in your industry and connect with your audience on a more personal level. By consistently creating high-quality, helpful content, you can build trust and loyalty with your readers and position your brand as a go-to resource for information and advice.

But simply creating great content isn't enough. You also need to make sure that your blog posts are easy to find and share. By embedding your blog posts on your website and using your RSS feed to automatically share them on social media and in email blasts, you can increase your visibility and reach a wider audience.

In addition to boosting your online presence, blogging can also help with your search engine optimization (SEO) efforts. By using relevant keywords and tags in your blog posts, you can improve your chances of ranking higher in search engine results pages (SERPs) and attracting more organic traffic to your site.

So if you're not already blogging, now is the time to start. With a little effort and creativity, you can create a powerful marketing tool that will help you connect with your audience, generate leads, and improve your online visibility.

rch Blogs

Status

Published

Published

Published

Published

Published

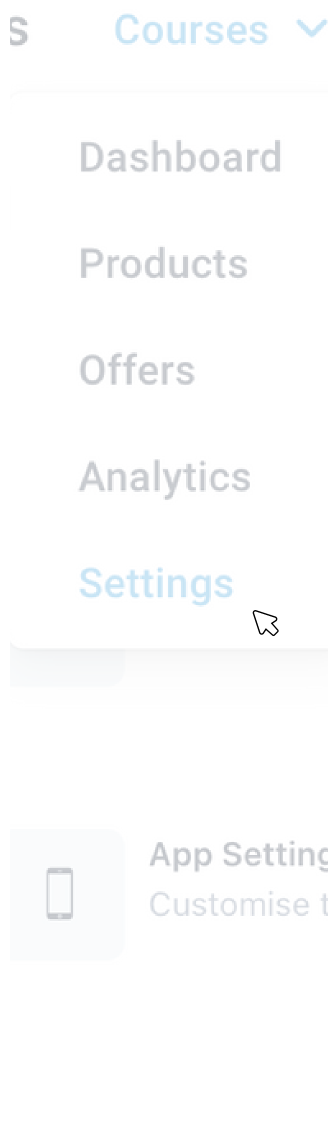
Published

MEMBERSHIP PORTAL

By offering courses and other educational materials, you can position yourself as an expert in your field. This will not only help you attract new customers, but it will also help you retain existing ones by providing ongoing value and support. With the ability to brand the portal to your company or client, you can ensure that your customers associate your brand with high-quality education and resources.

In addition, the new certificates feature allows you to offer accredited courses to your customers. This means that not only can they learn from you, but they can also earn recognized credentials that will help them advance in their careers. By becoming an accredited resource for your industry, you can set yourself apart from your competitors and establish yourself as a leader in your field.

Overall, creating courses, resource libraries, and other products is an excellent way to add value to your business and position yourself as an expert in your field. With the new certificates feature, you can take your offerings to the next level and become a trusted resource for your customers and industry alike.



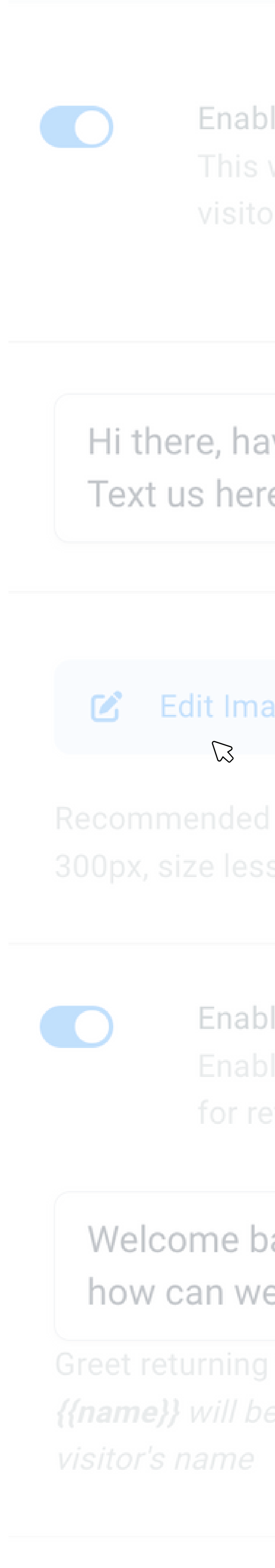
CHAT WIDGET

Customize the chat widget to your brand & connect to your funnels, websites, or external sites by using the code provided by the system.

This is a fantastic opportunity to make your brand stand out even more. By customizing the chat widget, you can ensure that it aligns with your brand's color scheme, messaging, and overall aesthetic. This creates a more cohesive user experience for your customers and helps to reinforce your brand's image in their minds.

What's great about this feature is that you can connect it to various channels, such as your funnels, websites, or external sites, by simply using the code provided by the system. This means that you can engage with customers on different platforms and provide them with a seamless experience no matter where they are interacting with your brand.

By taking advantage of the chat widget customization feature, you can not only enhance your brand's image but also build stronger relationships with your customers. So why not give it a try and see how it can benefit your business?

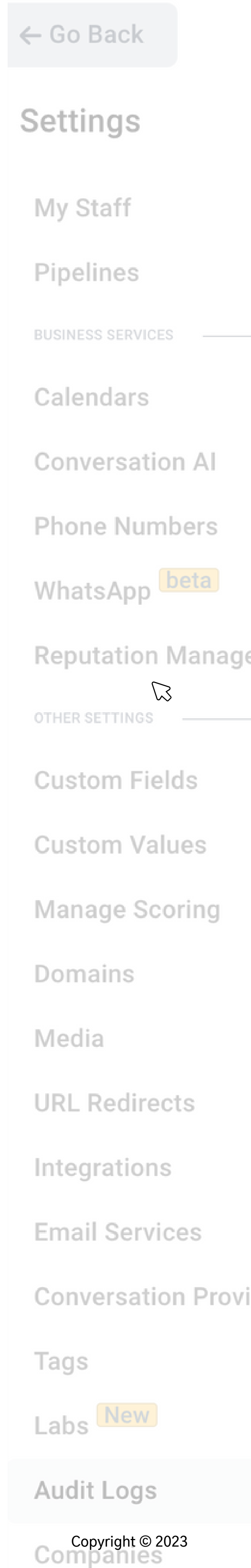


SETTINGS

Opens the settings screen where you can edit, customize, and control various business info, profile info, staff, permissions, and a ton of other key processes

When it comes to running a business, having control over various key processes is essential. With the settings screen, you can easily edit and customize your business info and profile info, ensuring that all of your important information is up-to-date and accurate. In addition, you can manage your staff and permissions, giving you the power to delegate tasks and responsibilities as you see fit.

Whether you are a small business owner or a large corporation, the settings screen is an essential tool for managing your business efficiently and effectively. So why wait? Start exploring all of the options available to you today and take your business to the next level!



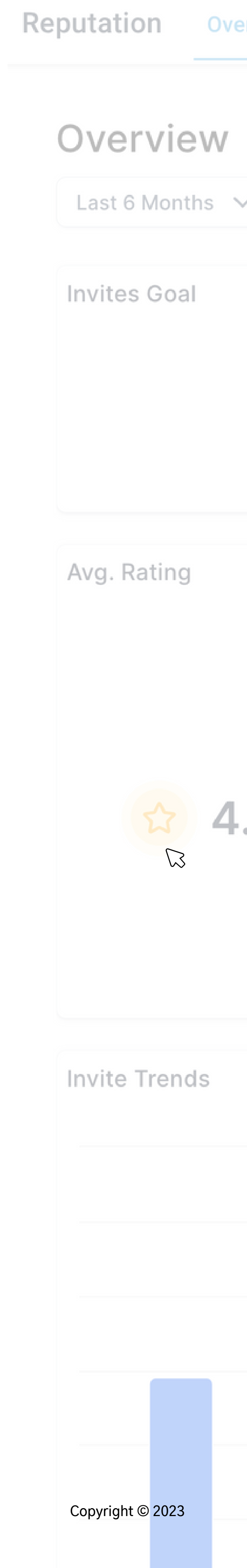
REVIEWS & REPUTATION

Connecting your business's Facebook and Google My Business pages can greatly benefit your online reputation and customer engagement. By linking your pages, you can easily request and automate reviews, manage your reviews, and view analytics to track your performance.

Additionally, you can dispute any negative reviews that may be inaccurate or unfair. By actively monitoring and engaging with your reviews, you can build trust with your customers and improve your overall online presence. So don't hesitate to connect your FB and GMB pages today!

Not only will connecting your FB and GMB pages improve your online reputation, but it will also make it easier for customers to find and interact with your business. By having a presence on both platforms, you can broaden your reach and attract new customers who may not have discovered your business otherwise.

Plus, with the ability to track analytics, you can gain valuable insights into your customers' behavior and preferences, allowing you to tailor your marketing efforts and improve your products or services. So take advantage of this simple yet effective way to enhance your business's online presence and start connecting your FB and GMB pages today!



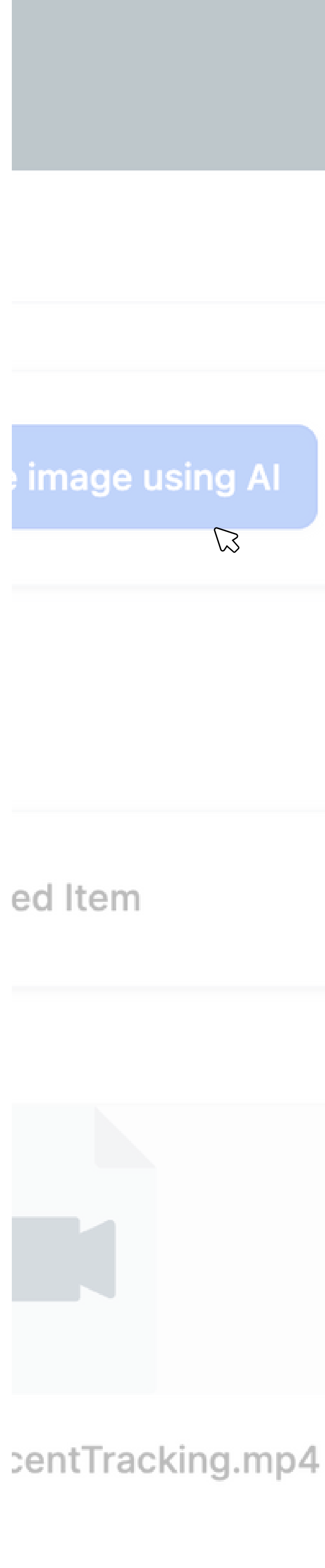
AI

The power of AI is revolutionizing the way we do business. By utilizing the Content AI tool, you can save time and money by generating high-quality copy without the need for a dedicated writer. This tool can be used for a variety of purposes, from writing articles for your website to crafting catchy subject lines for your marketing emails.

But why stop at just text? The Image AI tool allows you to generate stunning visuals to complement your copy. Whether you need images for your social media posts or graphics for your website, this tool has got you covered. With a few clicks, you can have a professional-looking image that perfectly captures the essence of your brand.

And if you're looking for even more automation, the Conversation AI tool is here to help. This powerful tool can suggest responses to messages, appointment booking, and inquiries, or even take over completely and respond on your behalf. With Conversation AI, you can focus on running your business while the tool handles all the customer interactions.

Overall, the AI tools offered for your business are a game-changer. By streamlining your content creation and customer interactions, you can save time and money while still maintaining a high level of quality. Give them a try and see the difference they can make for your business!



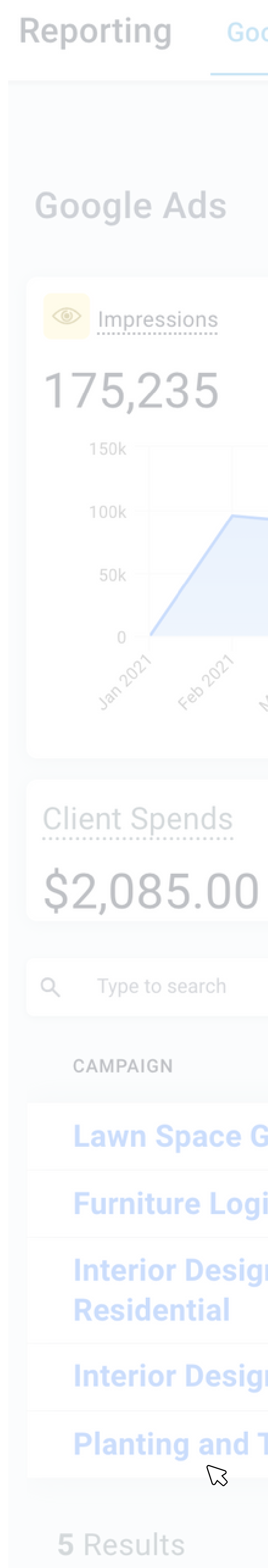
REPORTING

Analyzing data is an important part of any business, and it's no different when it comes to automating your customer interactions. By using the analytics provided by the system, you can track important metrics such as the number of calls made, appointments booked, and other key statistics. This information can be used to evaluate your performance and determine areas where you can improve.

One of the key benefits of using analytics is the ability to track appointment outcomes. By monitoring how many appointments are being booked, showed, no showed, or cancelled, you can gain valuable insights into the effectiveness of your automation, messaging, or team. This information can help you identify areas for improvement and make data-driven decisions about how to optimize your processes.

Another important metric to track is attributions. This refers to the source of your contacts and how they came into your system. By analyzing this data, you can determine which channels are most effective at driving traffic to your business, whether it be through a form or an ad. This information can be used to optimize your marketing campaigns and improve your overall performance.

In conclusion, there are many useful analytics provided by the system that can help you better understand your customers and improve your business processes. By using these tools, you can gain valuable insights into your performance and make data-driven decisions to optimize your interactions with customers.



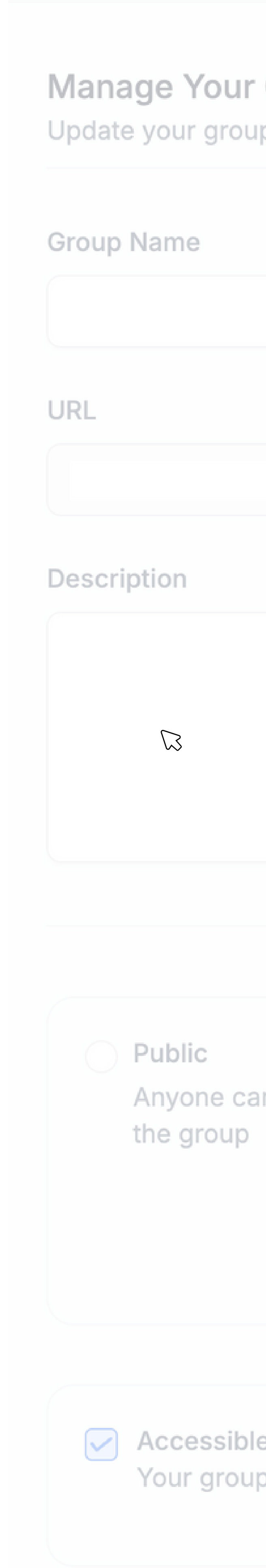
COMMUNITY & CLIENT PORTAL

Having a dedicated group within your membership area can be an invaluable tool for building relationships with your clients, leads, and other contacts. By providing a platform where members can interact with one another, share ideas, and learn from your expertise, you can foster a sense of community that will keep people engaged with your brand over the long term.

In addition, having a group within your membership area allows you to provide more personalized support to your members. You can use the group to answer questions, address concerns, and provide guidance to help your members achieve their goals.

Of course, one of the biggest benefits of having a group within your membership area is that you have complete control over the content and the branding. You can customize the group to match your company's branding, and you can monetize the group by offering exclusive content, courses, and other resources to your members.

Overall, customizing your client portal & creating an engaging group within the membership's community tool is an excellent way to build relationships with your clients and other contacts, provide personalized support, and monetize your expertise.



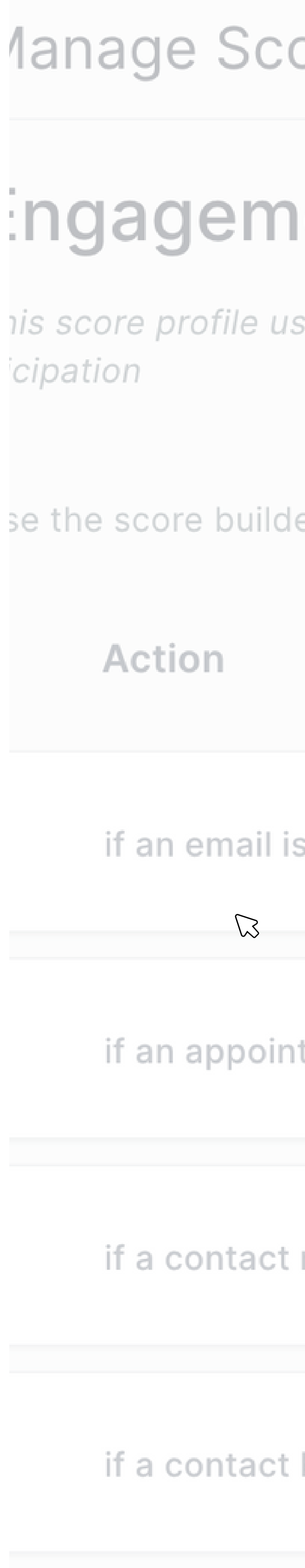
LEAD SCORING

Create rules based on actions that your contacts may take to add or subtract points to show how engaged they are. Use this total number to determine which leads are more likely to purchase, are more active & engaged with your content, and other factors.

By implementing engagement scoring, you can prioritize your follow-up efforts and focus on the leads that are most likely to convert. For example, if a contact opens an email, that action could add 5 points to their engagement score. On the other hand, if they unsubscribe from your mailing list, that could subtract 10 points from their score. You can create your own rules based on the actions that are most relevant to your business and your audience.

Engagement scoring is also a great way to identify areas where you can improve your marketing efforts. If you notice that a large number of contacts are unsubscribing or not engaging with your content, you can use that feedback to adjust your messaging or your approach.

Overall, engagement scoring is a powerful tool for any marketer who wants to improve their lead generation and lead nurturing efforts. By focusing on the leads that are most engaged with your brand, you can maximize your ROI and build stronger relationships with your audience.



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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