

# OVERVIEW OF ACCOUNT FEATURES

Company \_\_\_\_\_

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
Automation	Create detailed workflows that execute off of customized triggers and fire off specified actions that you determine & 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
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
Wordpress	Import or create a site through Wordpress directly in the system
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!
Content 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
Ad Reporting	Track & automate off of adwords, ad engagement, and view analytics