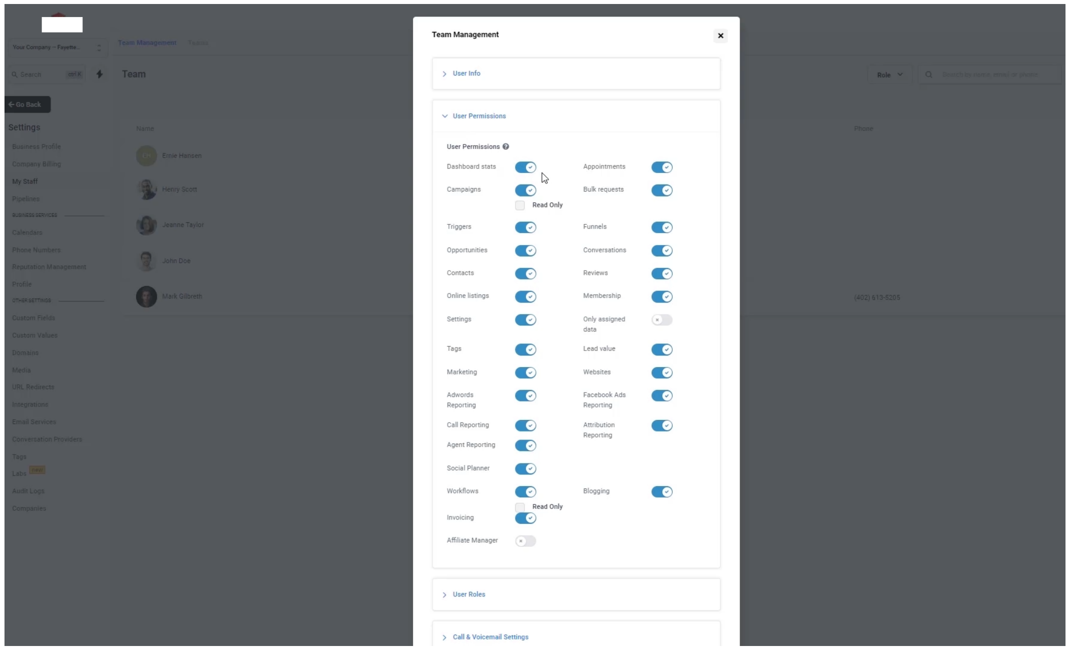


Here's an overview of your account settings. Some of this is basic information, yet it's criti you can have a good foundation and be set up for success with using the system. Below \ highlight some of the most important and foundational elements.

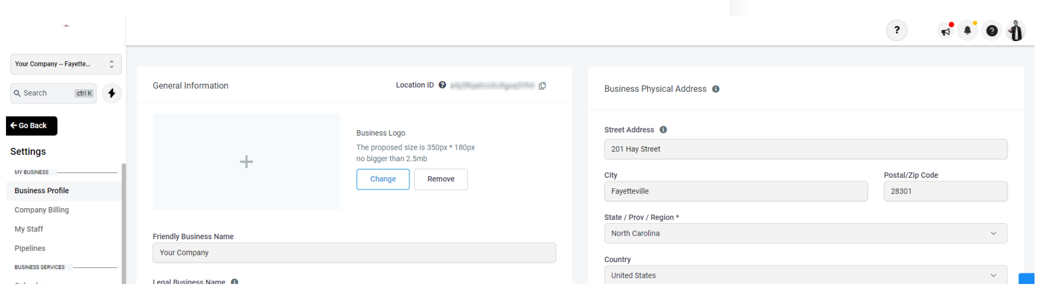
NOTE: Depending on your user settings, you may see different options.

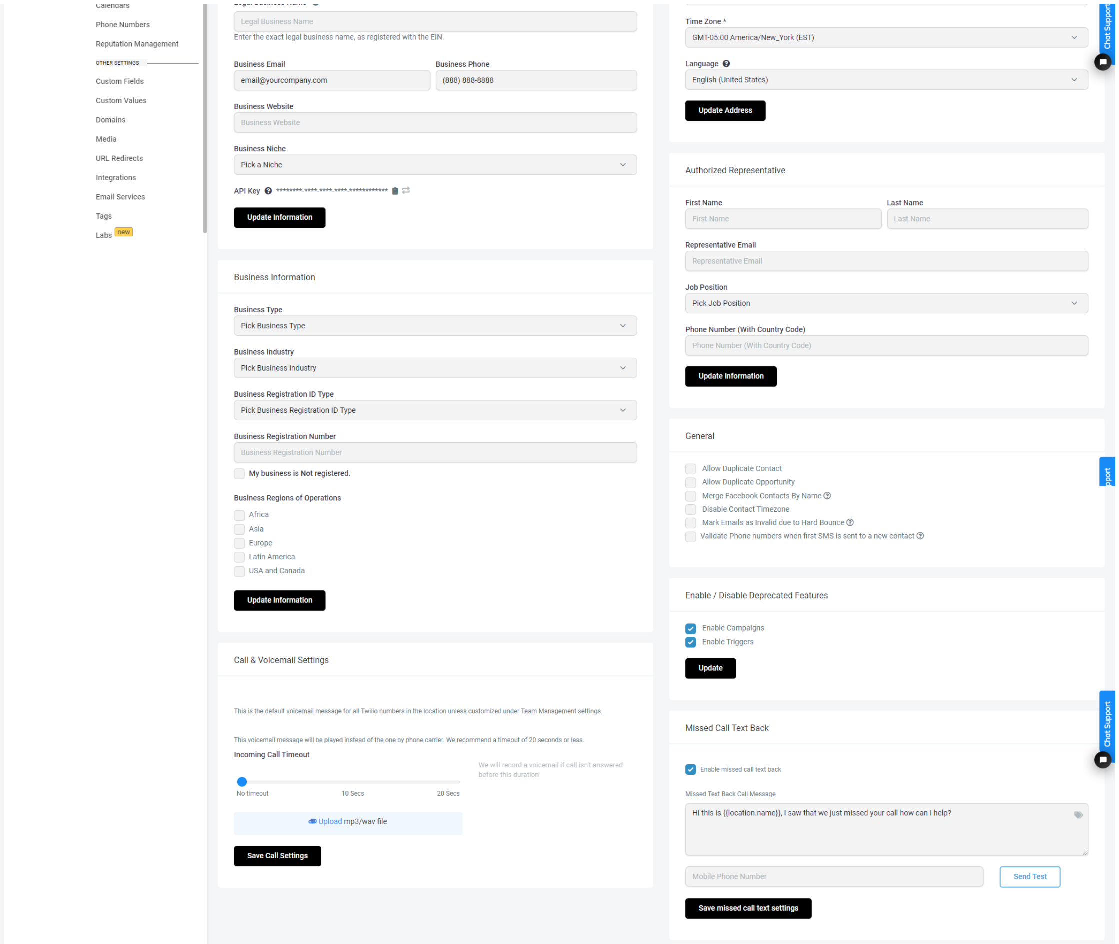
Profile

- Upload, change, or remove a logo
- Manage personal information, including name, email, phone number
- Set up an email signature
- Change Password
- User Availability
- Integrations (for Zoom and Outlook Calendar)
- Set up Calendar Configurations

Business Profile

- Manage company information such as company name, email, phone, and website
- API Key: You can use this for Zapier and API integrations
- Call and Voicemail Settings
- Company Address
- Enable / Disable Depreciated Features
- General settings (toggle on or off the following):
  - Allow duplicate contact
  - Allow duplicate opportunity
  - Merge Facebook Contacts by Name
  - Disable Contact Timezone
- Missed Call Text Back

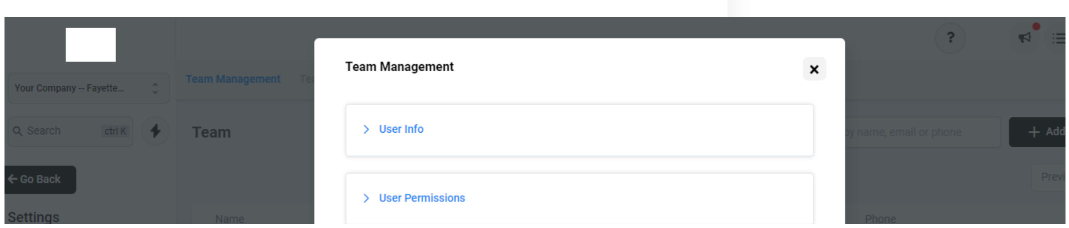


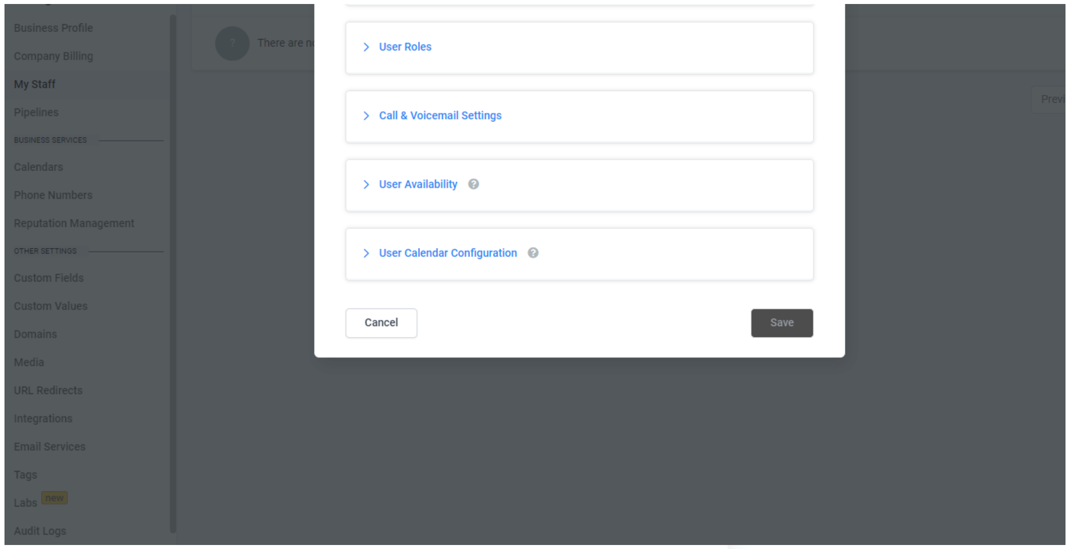


My Staff

Team Management

- In this section, you can add or remove users in your account. You can add a personal logo fo user too. For each employee, fill out their basic information: name, email, and phone number. also add phone extensions here.
- You can set and reset passwords for each user here too.
- You can establish an email signature for each user, which can be helpful for campaigns they a assigned to.
- You can also assign a specific calendar to the user.
- Permissions: You will only be able to change these if you are an admin for your account. If yo user, you will not have access to this. If you are the administrator, you can toggle on and off tl various permissions for the users within your team.
- User Role: assign the user to be a general user or an admin. Again, you will only have access if you are an admin
- Call and Voicemail settings: include an inbound Twilio number here if the user requires a dedi number. You can also set the call time-out and upload a voicemail recording file.
- User Availability: set up the default availability for each user.
- User Calendar Configuration: connect a Google calendar for a user, if they want to sync their calendar in the system with a Google calendar.



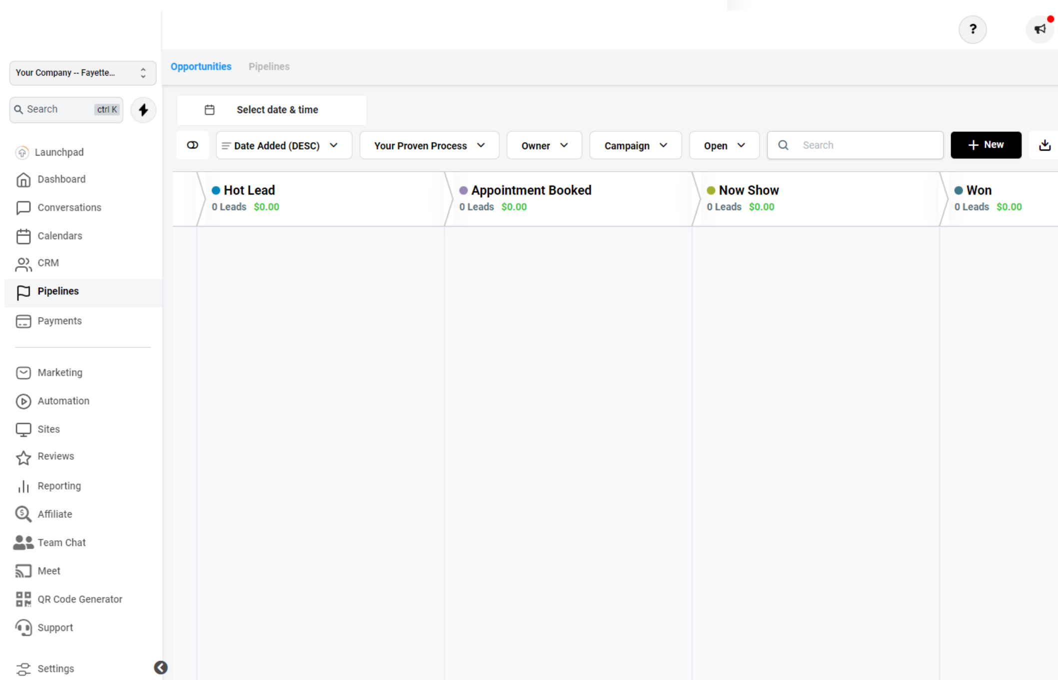


Teams

- In this section, you can add, edit, or remove teams (or pools) of users in your system. This ca helpful if you have a sales team and customer service team, etc., and need to differentiate be them.

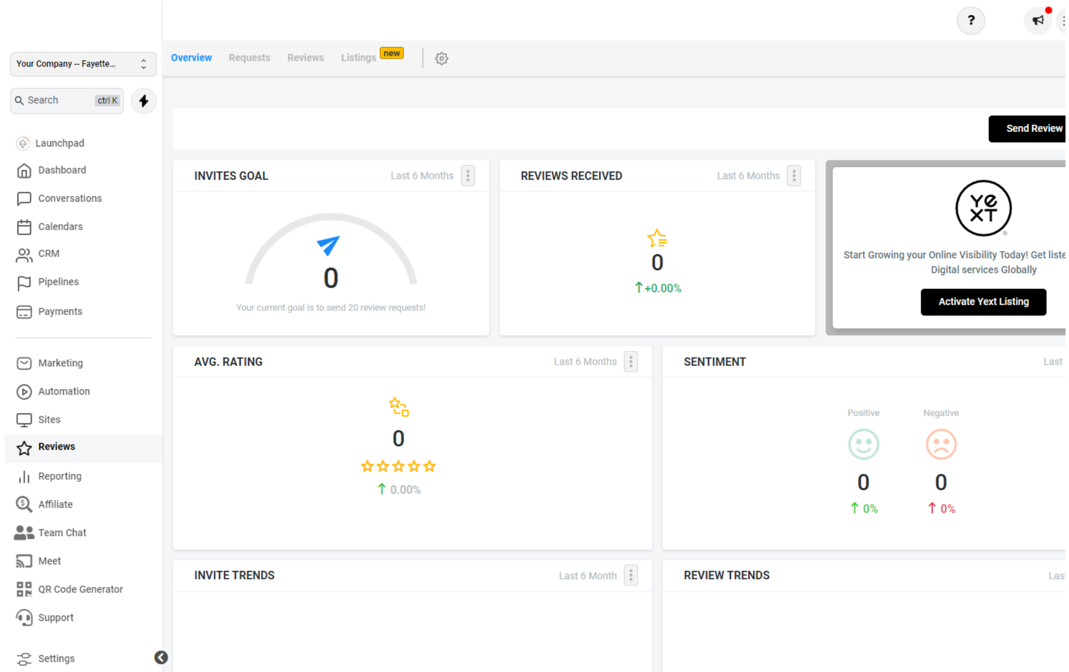
Pipelines

- This section is how you organize the flow of leads through your CRM. You can create pipeline to track your leads through different stages. For example, you may have your leads begin in t prospect stage, then move to booked call/appointment, then sold. You can customize this sec and the pipeline stages, however make sense for your business.



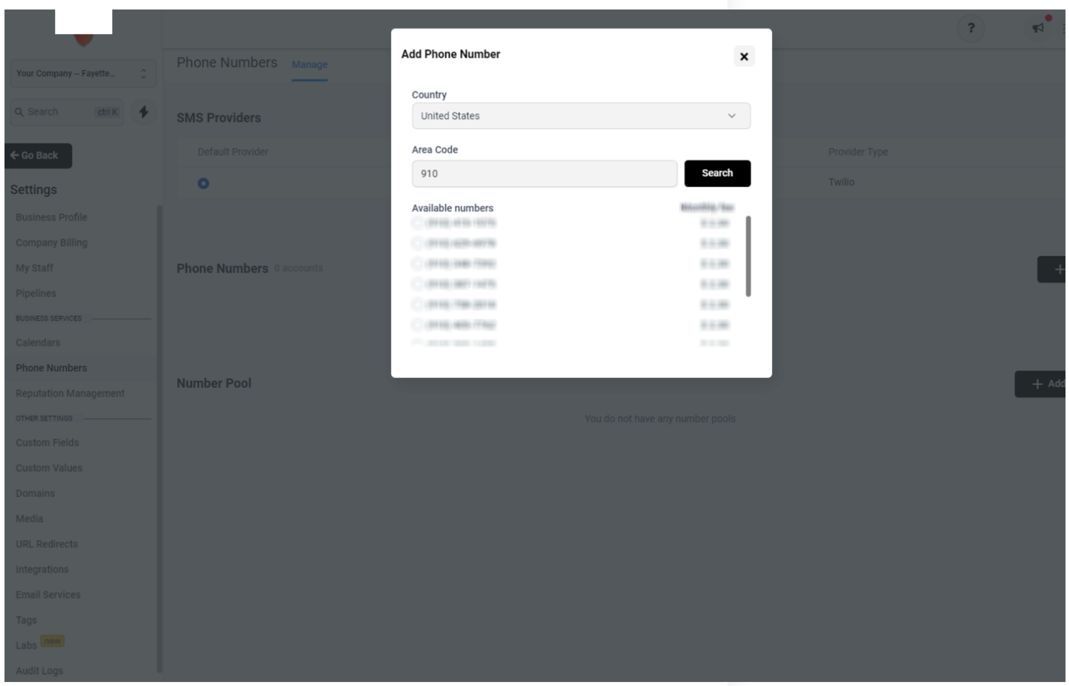
Reviews

- You can customize your review email and SMS communication, add your review link, and cus your review widget. With the widget, you can capture testimonials, so long as you have your (and/or Facebook integrated. It can pull them up and generate the code to have them referenc your website, calendar, funnel, or wherever you have the widget.



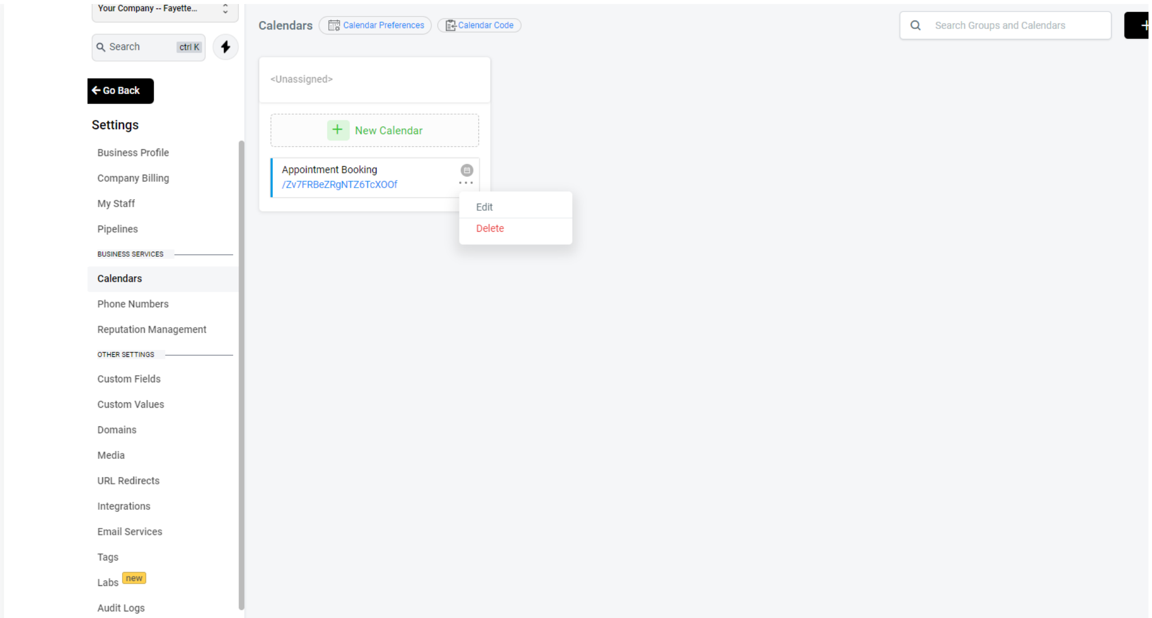
Phone Numbers

- In this section, you can manage any phone number(s) for your system.
- You can add outbound numbers, forwarding numbers, and number pools.



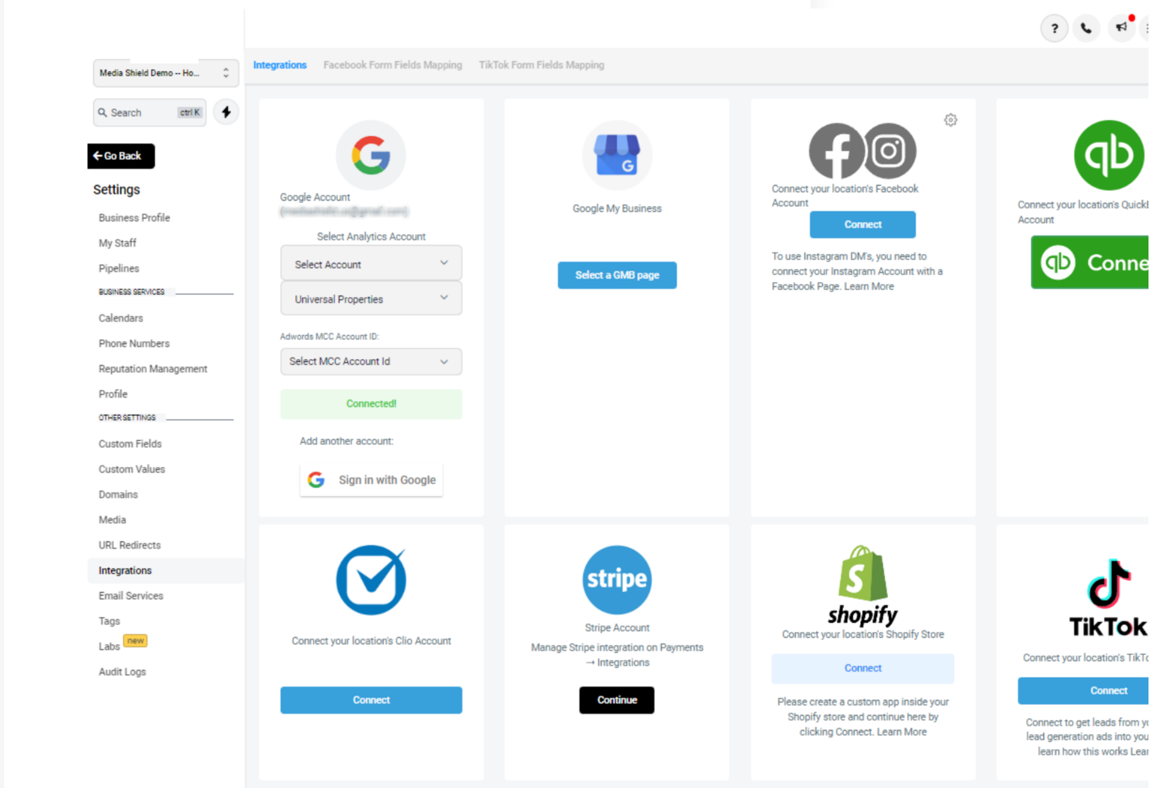
Calendars

- This section is where you can create and manage your calendars. Please review to our other for full calendar setup specifics.
  - ***NOTE:*** You can also access “Calendar Settings” from the Calendars page on your main dashboard menu.



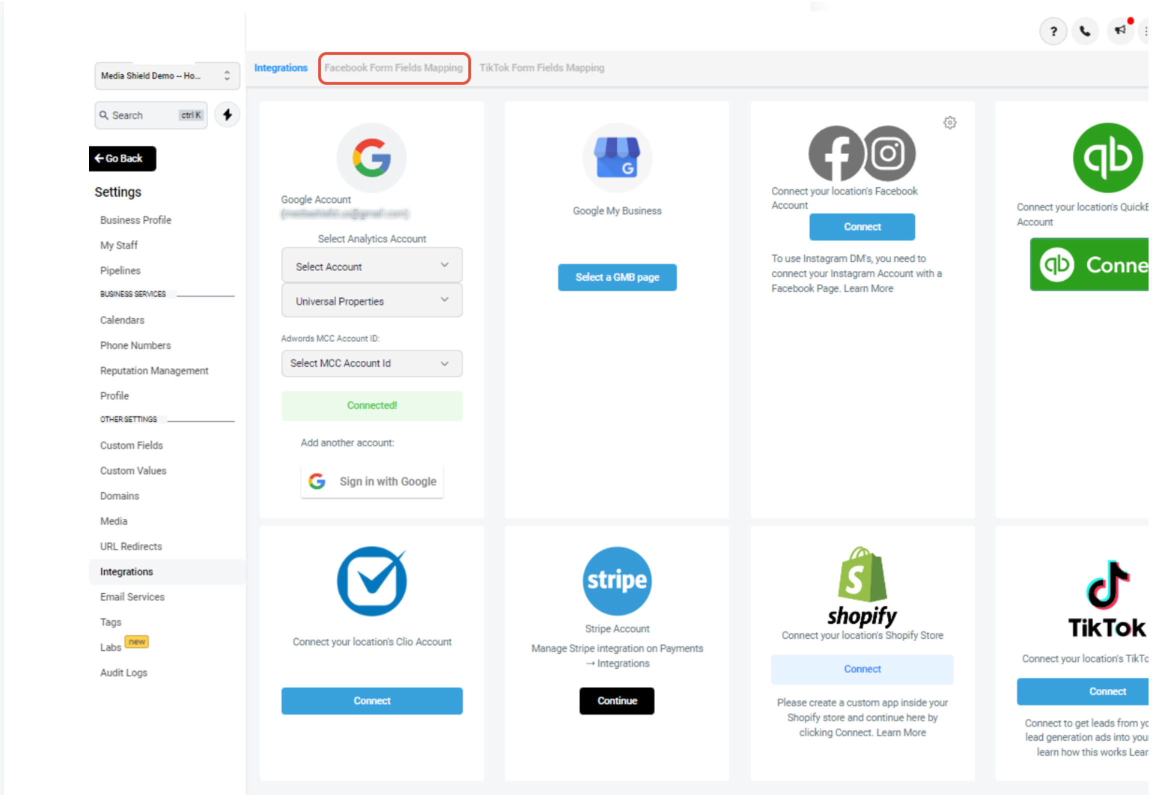
Integrations

- View a list of available integrations for your system. Click “Connect” to start the process. (You redirected to log in to that third-party system, such as Google or Facebook, to allow the integr Most common integrations include Google (to sync with calendar appointments), Facebook (t with ads), Instagram (for direct messaging), and Stripe (to sync for payments).



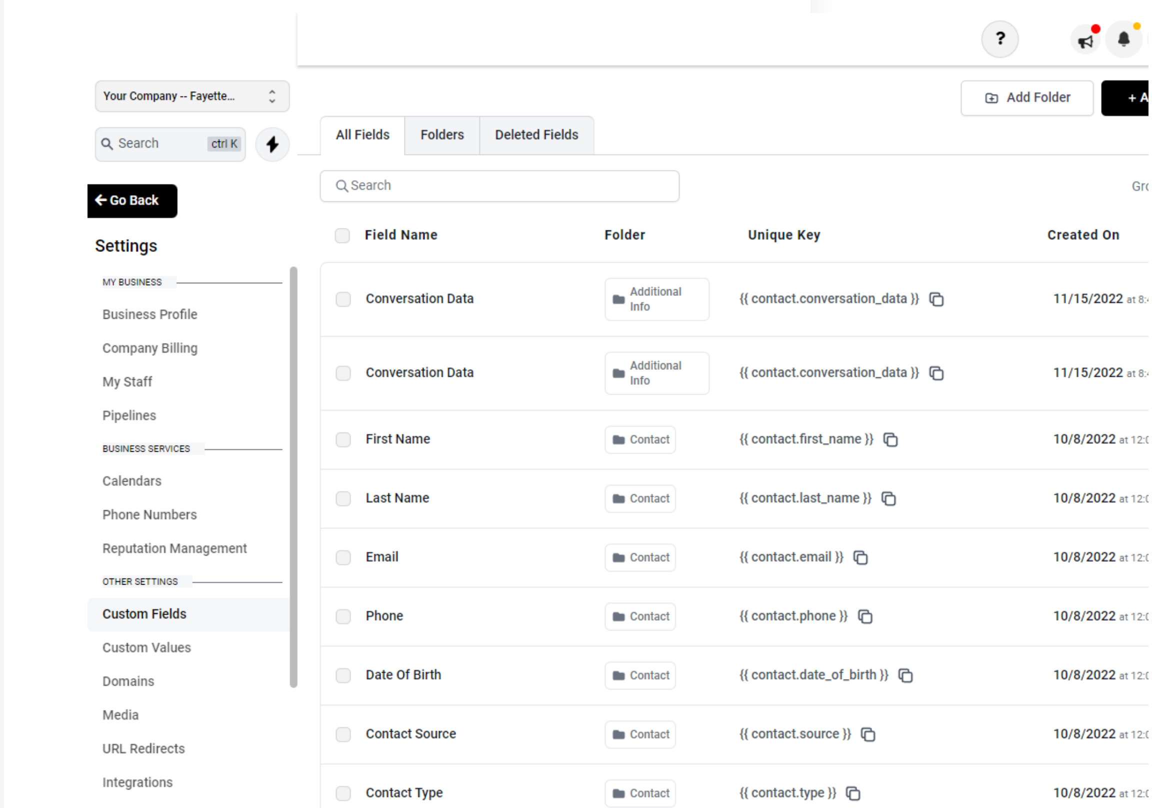
Facebook Form Fields Mapping

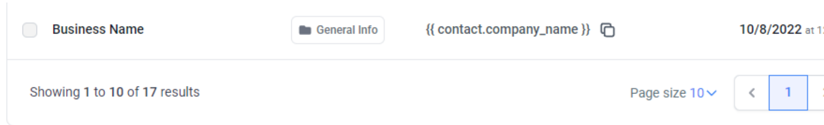
- This section will work only if you have the Facebook integration setup. If you’re running Faceb leads and using Facebook forms, you can map the fields from Facebook into the system. You need to map the fields to work properly in the system.



Custom Fields

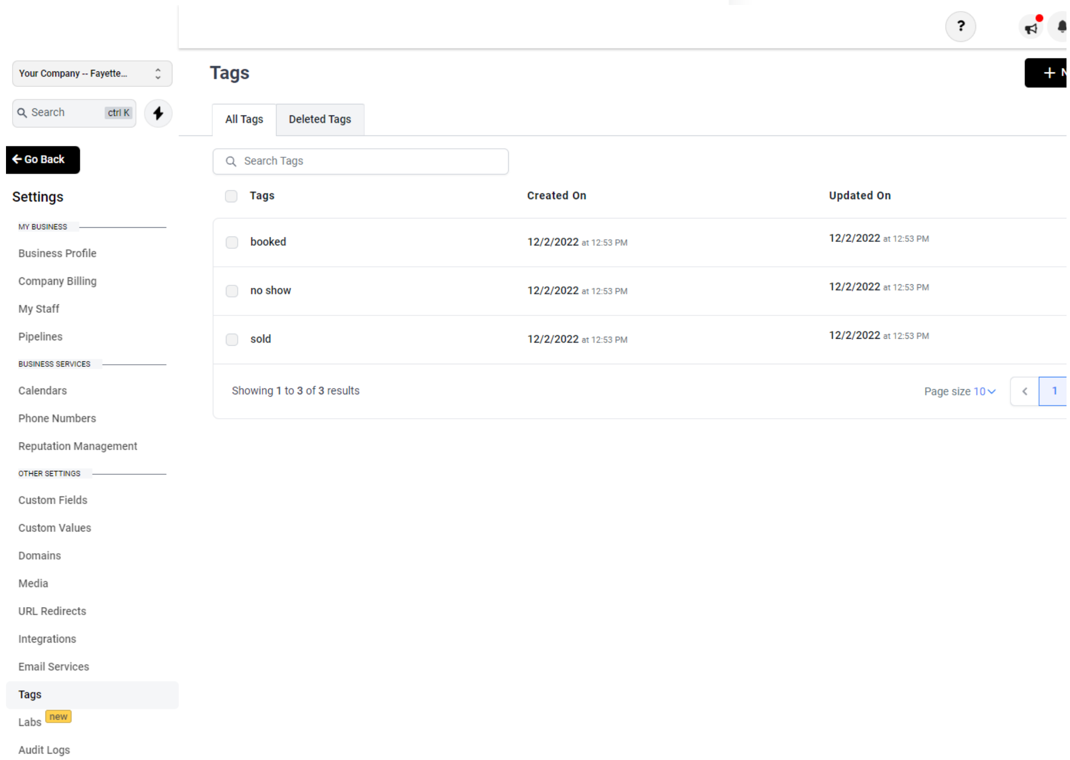
- Here you can organize and manage your custom fields. You can create these in the form and builder, and they will be listed/organized here. Custom fields are used to create/capture speci of information in your system. If you work in a specific niche or industry and have your contac a form with specific information related to their health, income, etc. you may want that capture information to be saved in a 'field' in their contact record. Since the system is designed to cap general information, you can customize it to capture this more specific information.





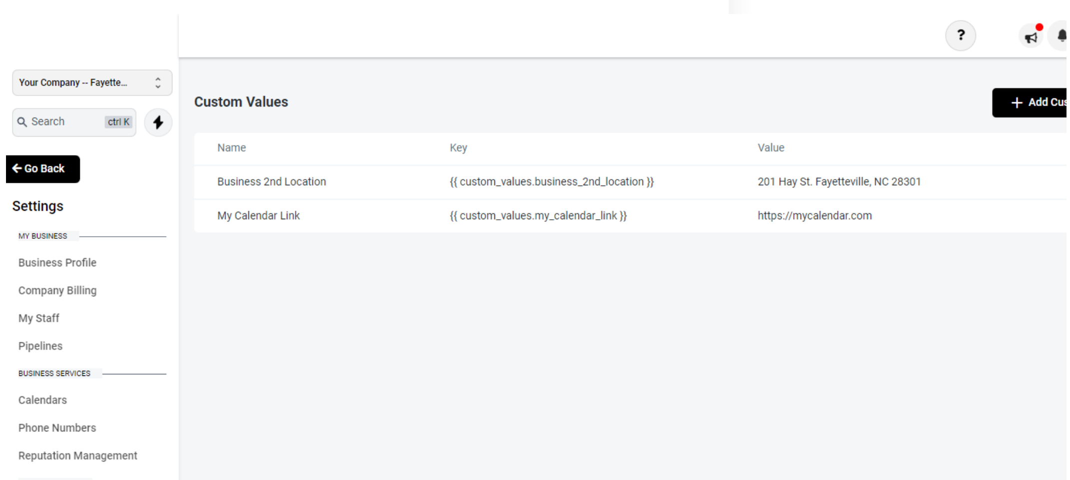
Tags

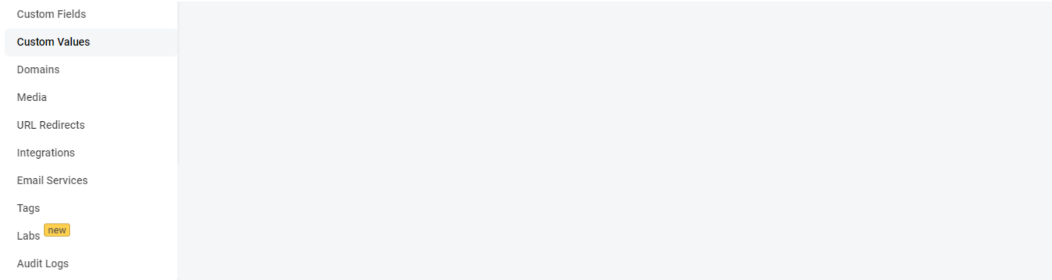
- Tags are a great way to organize contacts. Tags can be used to sort lists of prospects vs. colc different groups of clients, sort contacts by how they came into your system, and more. Tags (used to trigger events in the system. Here, you can manage your list of tags.



Custom Values

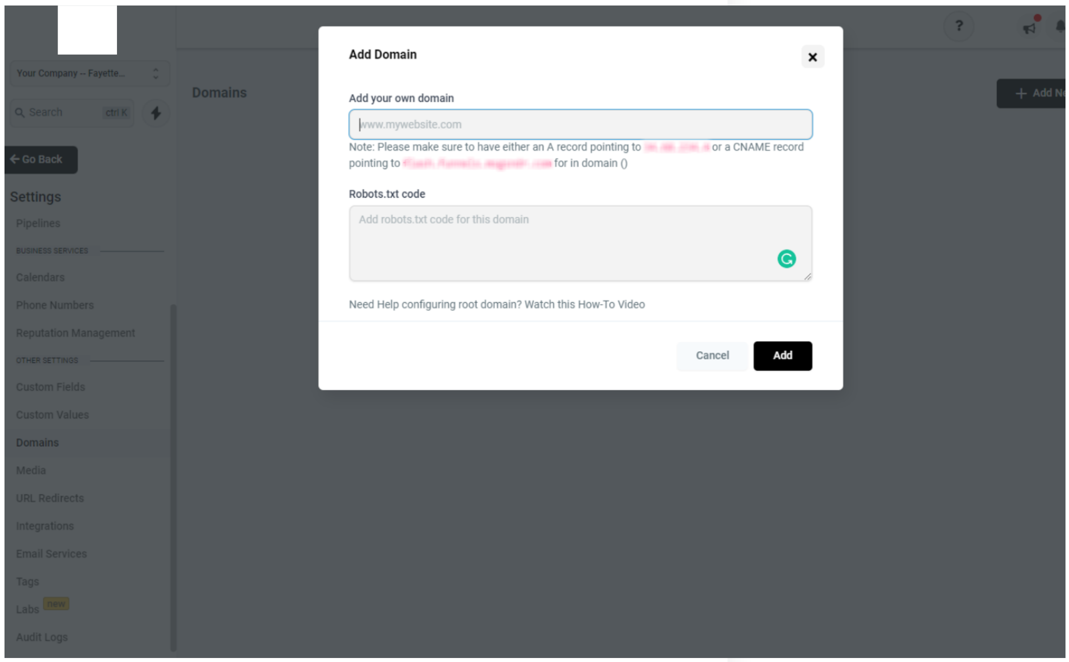
- Custom values are dynamically updating mini codes you can use in email templates, triggers, and more to pull in information. For example, you may want to have an email that pulls in the first name so you can use the “contact first name” custom value, which will auto-populate the name. The template would read “Hello {{ custom_values.contact_first_name }} “ and the syst insert the appropriate first name.





Domains

- This is where you add in your domain(s), or address people type into the web browser URL to your website.



Email Services

- This is where you can add an email, set up a forwarding address, and setup a BCC for all em Check out specific SMTP and Mailgun-related tutorials.