

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

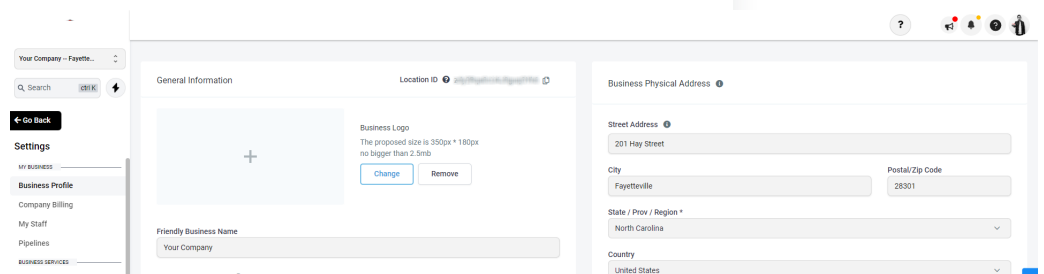
NOTE: Depending on your user settings, you may see different options.

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



Phone Numbers

Regulation Management

OTHER SETTINGS

Custom Fields

Custom Values

Domains

Media

URL Redirects

Integrations

Email Services

Tags

Labs

Legal Business Name

Enter the exact legal business name, as registered with the EIN.

Business Email

email@yourcompany.com

Business Phone

(888) 888-8888

Business Website

Business Website

Business Niche

Pick a Niche

API Key

XXXXXXXXXX_XXXXXX_XXXXXXXXXXXX

Update Information

Business Information

Business Type

Pick Business Type

Business Industry

Pick Business Industry

Business Registration ID Type

Pick Business Registration ID Type

Business Registration Number

Business Registration Number

☐ My business is Not registered.

Business Regions of Operations

Africa

Asia

Europe

Latin America

USA and Canada

Update Information

Call & Voicemail Settings

This is the default voicemail message for all Twilio numbers in the location unless customized under Team Management settings.

This voicemail message will be played instead of the one by phone carrier. We recommend a timeout of 20 seconds or less.

Incoming Call Timeout

No timeout

10 Secs

20 Secs

We will record a voicemail if call isn't answered before this duration.

Upload mp3/wav file

Save Call Settings

Time Zone

GMT-05:00 America/New_York (EST)

Language

English (United States)

Update Address

Authorized Representative

First Name

Last Name

Representative Email

Representative Email

Job Position

Pick Job Position

Phone Number (With Country Code)

Phone Number (With Country Code)

Update Information

General

☐ Allow Duplicate Contact

☐ Allow Duplicate Opportunity

☐ Merge Facebook Contacts By Name

☐ Disable Contact Timezone

☐ Mark Emails as Invalid due to Hard Bounce

☐ Validate Phone numbers when first SMS is sent to a new contact

Enable / Disable Deprecated Features

☒ Enable Campaigns

☒ Enable Triggers

Update

Missed Call Text Back

☒ Enable missed call text back

Missed Text Back Message


Hi this is {location.name}, I saw that we just missed your call how can i help?

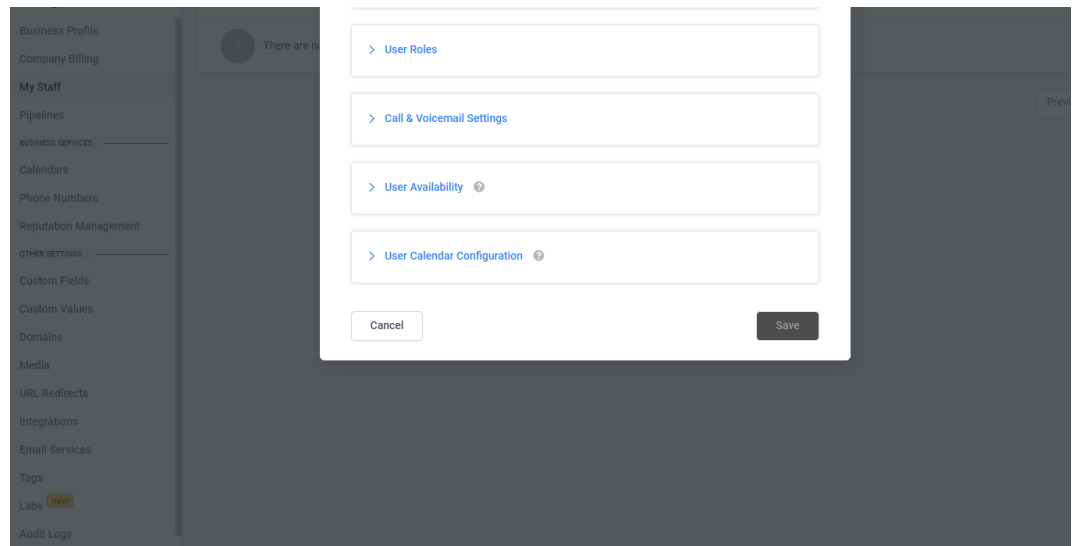
Send Test

Mobile Phone Number

Save missed call text settings

Team Management

- 
- The screenshot shows a modal titled "Team Management" with a close button (X) in the top right corner. The modal contains two sections: "User Info" and "User Permissions", each with a blue chevron icon and a link to the respective settings page. The background shows a blurred view of the main application interface, including a sidebar with "Team Management" and "Team" sections, and a main content area with a search bar and a "Go Back" button.

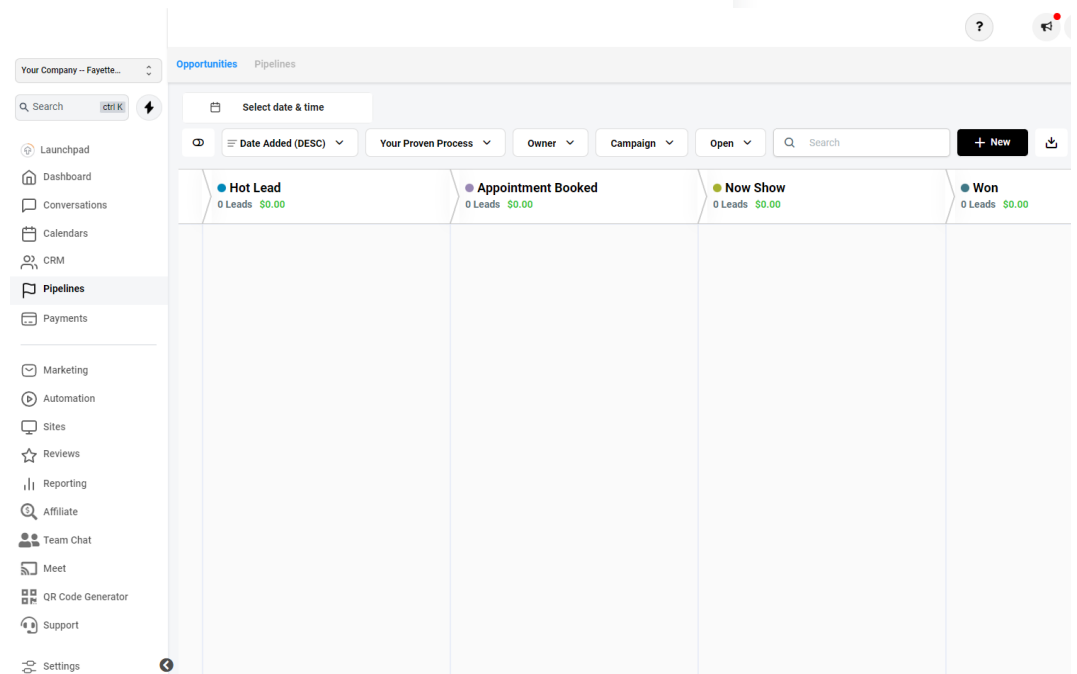


Teams

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

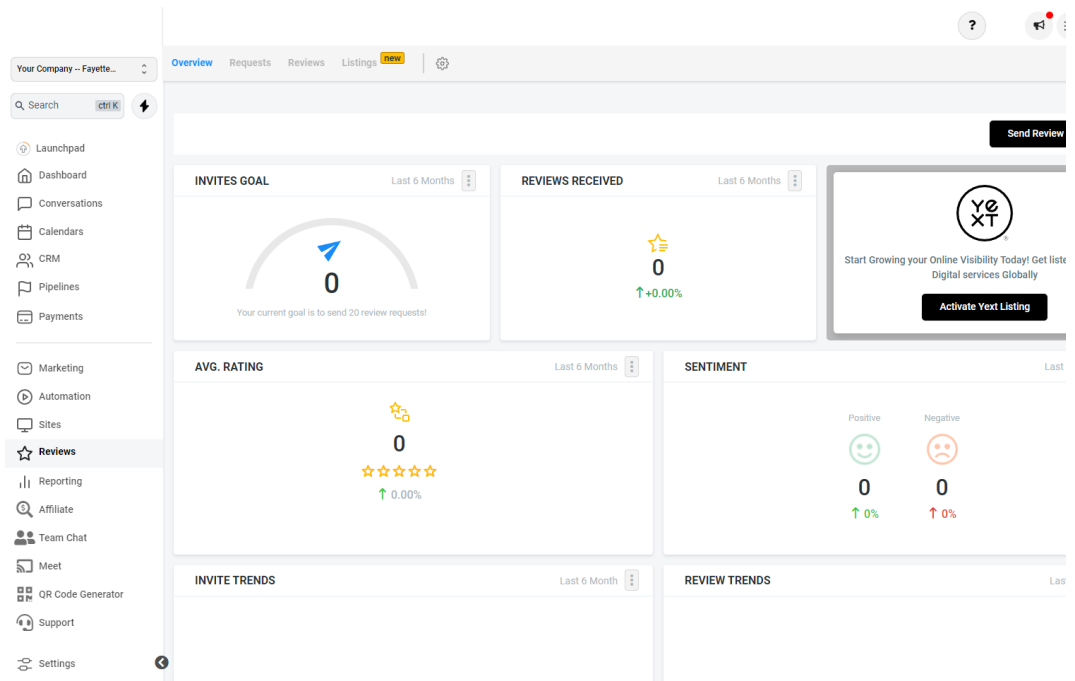
Pipelines

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



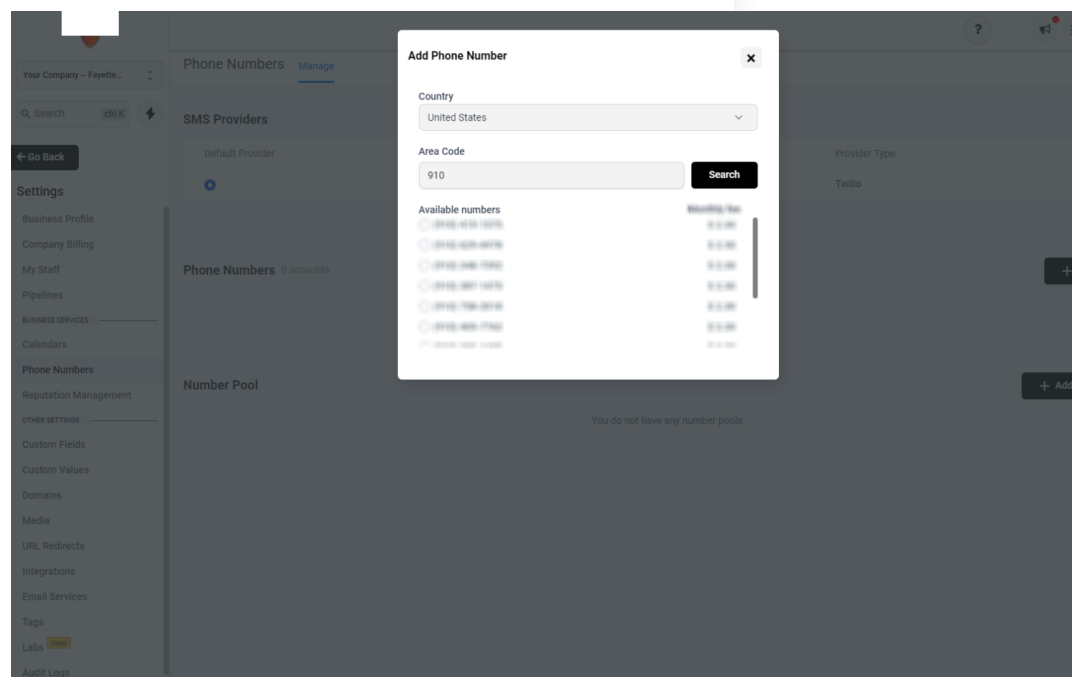
Reviews

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



Phone Numbers

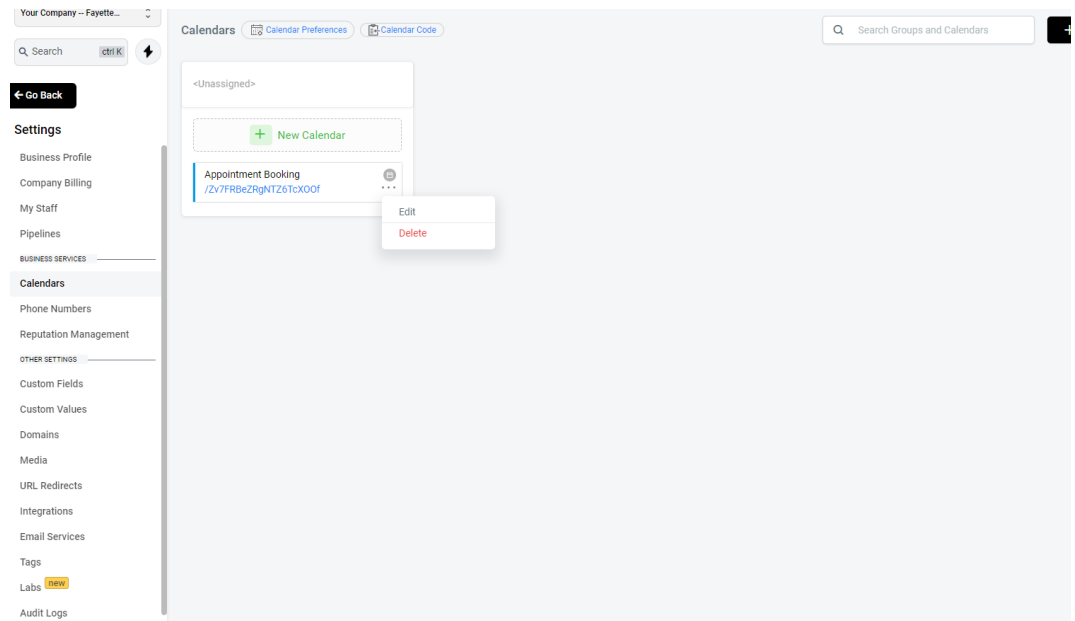
- In this section, you can manage any phone number(s) for your system.
- You can add outbound numbers, forwarding numbers, and number pools.



Calendars

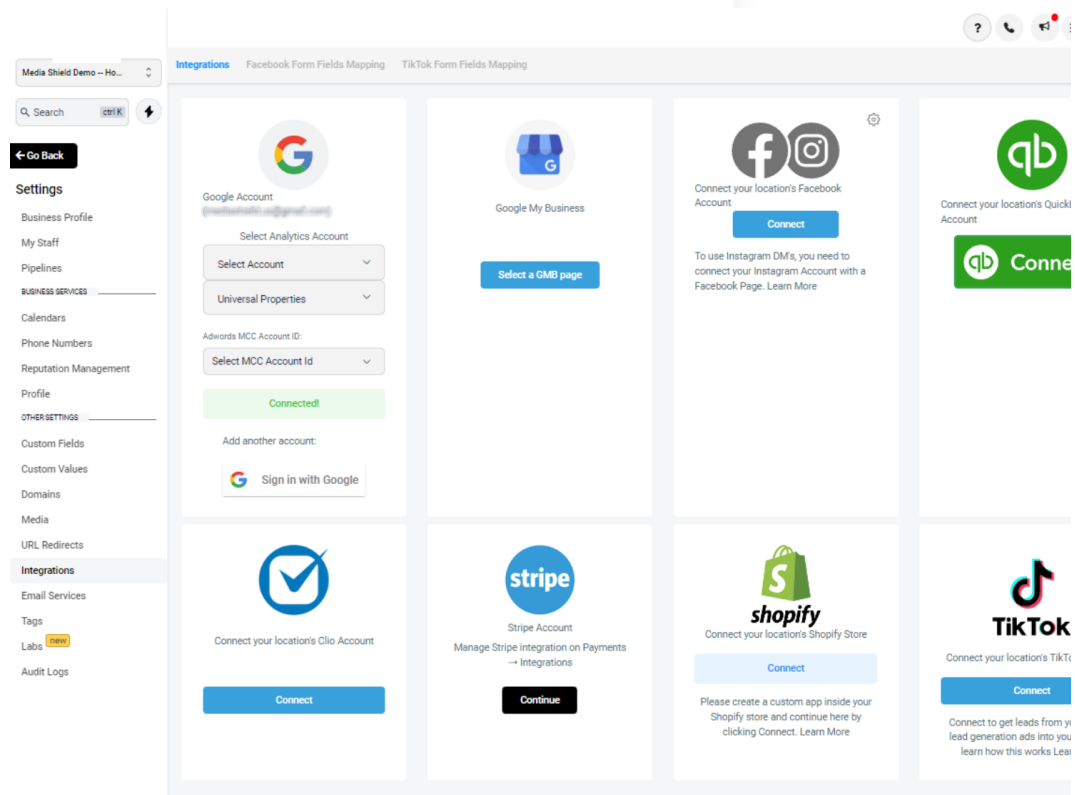
- This section is where you can create and manage your calendars. Please review to our other for full calendar setup specifics.
- **NOTE:** You can also access “Calendar Settings” from the Calendars page on your main dashboard menu.

Account Settings Overview : Media Flare



Integrations

- View a list of available integrations for your system. Click “Connect” to start the process. (You are redirected to log in to that third-party system, such as Google or Facebook, to allow the integration.) Most common integrations include Google (to sync with calendar appointments), Facebook (to sync 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 Facebook 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.

Media Shield Demo -- Ho...

Integrations Facebook Form Fields Mapping TikTok Form Fields Mapping

Q Search ctrl K

Go Back

Settings

- Business Profile
- My Staff
- Pipelines
- BUSINESS SERVICES
- Calendars
- Phone Numbers
- Reputation Management
- Profile
- OTHER SETTINGS
- Custom Fields
- Custom Values
- Domains
- Media
- URL Redirects
- Integrations
- Email Services
- Tags
- Labs
- Audit Logs

Google Account

Select Analytics Account

Select Account

Universal Properties

Adwords MCC Account ID:

Select MCC Account Id

Connected!

Add another account:

Sign in with Google

Google My Business

Select a GMB page

Connect your location's Facebook Account

Connect

To use Instagram DM's, you need to connect your Instagram Account with a Facebook Page. Learn More

Connect your location's QuickBooks Account

Connect

Connect your location's Clio Account

Connect

Stripe Account

Manage Stripe integration on Payments → Integrations

Continue

Connect your location's Shopify Store

Connect

Please create a custom app inside your Shopify store and continue here by clicking Connect. Learn More

Connect your location's TikTok

Connect

Connect to get leads from your lead generation ads into your learn how this works Learn

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 specific information in your system. If you work in a specific niche or industry and have your contact 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 capture general information, you can customize it to capture this more specific information.

Your Company -- Fayette...

Q Search ctrl K

Go Back

Settings

- MY BUSINESS
- Business Profile
- Company Billing
- My Staff
- Pipelines
- BUSINESS SERVICES
- Calendars
- Phone Numbers
- Reputation Management
- OTHER SETTINGS
- Custom Fields
- Custom Values
- Domains
- Media
- URL Redirects
- Integrations

All Fields Folders Deleted Fields

Q Search

Field Name Folder Unique Key Created On

| | | | |
|-------------------|-----------------|---------------------------------|--------------------|
| Conversation Data | Additional Info | {{ contact.conversation_data }} | 11/15/2022 at 8:00 |
| Conversation Data | Additional Info | {{ contact.conversation_data }} | 11/15/2022 at 8:00 |
| First Name | Contact | {{ contact.first_name }} | 10/8/2022 at 12:00 |
| Last Name | Contact | {{ contact.last_name }} | 10/8/2022 at 12:00 |
| Email | Contact | {{ contact.email }} | 10/8/2022 at 12:00 |
| Phone | Contact | {{ contact.phone }} | 10/8/2022 at 12:00 |
| Date Of Birth | Contact | {{ contact.date_of_birth }} | 10/8/2022 at 12:00 |
| Contact Source | Contact | {{ contact.source }} | 10/8/2022 at 12:00 |
| Contact Type | Contact | {{ contact.type }} | 10/8/2022 at 12:00 |

☐ Business Name

General Info

{{ contact.company_name }}

10/8/2022 at 12:1

Showing 1 to 10 of 17 results

Page size 10 < 1 2

Tags

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

Your Company -- Fayette...

Q Search ctrl K

Go Back

Settings

MY BUSINESS

Business Profile

Company Billing

My Staff

Pipelines

BUSINESS SERVICES

Calendars

Phone Numbers

Reputation Management

OTHER SETTINGS

Custom Fields

Custom Values

Domains

Media

URL Redirects

Integrations

Email Services

Tags

Labs new

Audit Logs

Tags

All Tags Deleted Tags

Q Search Tags

| Tags | Created On | Updated On |
|----------------------------------|-----------------------|-----------------------|
| <input type="checkbox"/> booked | 12/2/2022 at 12:53 PM | 12/2/2022 at 12:53 PM |
| <input type="checkbox"/> no show | 12/2/2022 at 12:53 PM | 12/2/2022 at 12:53 PM |
| <input type="checkbox"/> sold | 12/2/2022 at 12:53 PM | 12/2/2022 at 12:53 PM |

Showing 1 to 3 of 3 results

Page size 10 < 1

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 system will insert the appropriate first name.

Your Company -- Fayette...

Q Search ctrl K

Go Back

Settings

MY BUSINESS

Business Profile

Company Billing

My Staff

Pipelines

BUSINESS SERVICES

Calendars

Phone Numbers

Reputation Management

OTHER SETTINGS

Custom Values

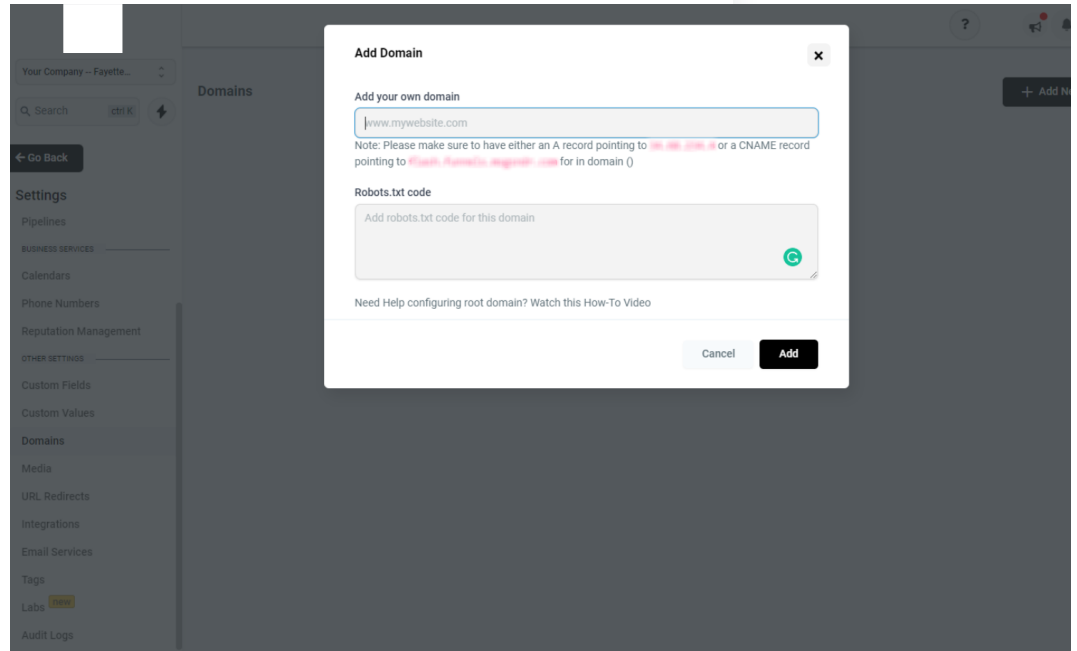
+ Add Custom Value

| Name | Key | Value |
|-----------------------|---|------------------------------------|
| Business 2nd Location | {{ custom_values.business_2nd_location }} | 201 Hay St. Fayetteville, NC 28301 |
| My Calendar Link | {{ custom_values.my_calendar_link }} | https://mycalendar.com |

Custom Fields
Custom Values
Domains
Media
URL Redirects
Integrations
Email Services
Tags
Labs **new**
Audit Logs

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.

