

Lead Closer CRM

Lead Closer CRM Allows You To Manage Your Facebook Contacts Via Messenger Much More Effectively!



One of many advantages of using Lead Closer CRM is to take the potentially thousands of Facebook Contacts and do a much better job of sorting them so you know which contacts to focus on.

As well, Lead Closer CRM allows you to create your ideal marketing messages so with just a few clicks you can make sure to send the most effective messages while saving time.

Last but not least our Broadcasting feature allows you to send a large number of your contacts DIFFERENT messages (so you don't get blocked by FB) through Messenger (which is 10 times more effective than email).

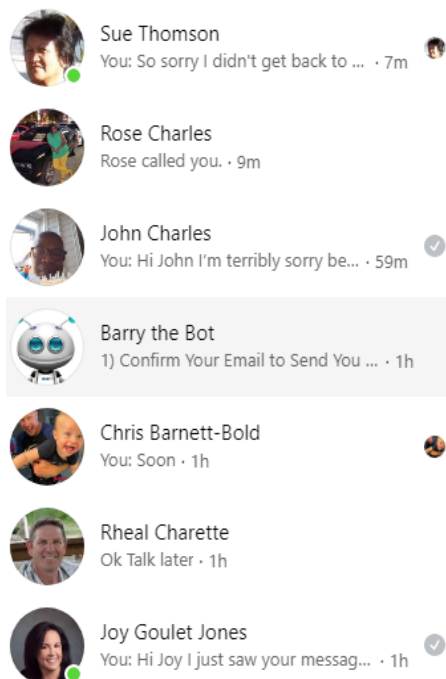
Please note that Lead Closer CRM used to be called “FB Contact Manager” so you will see a reference to FB Contact Manager in some images.

Labeling Contacts

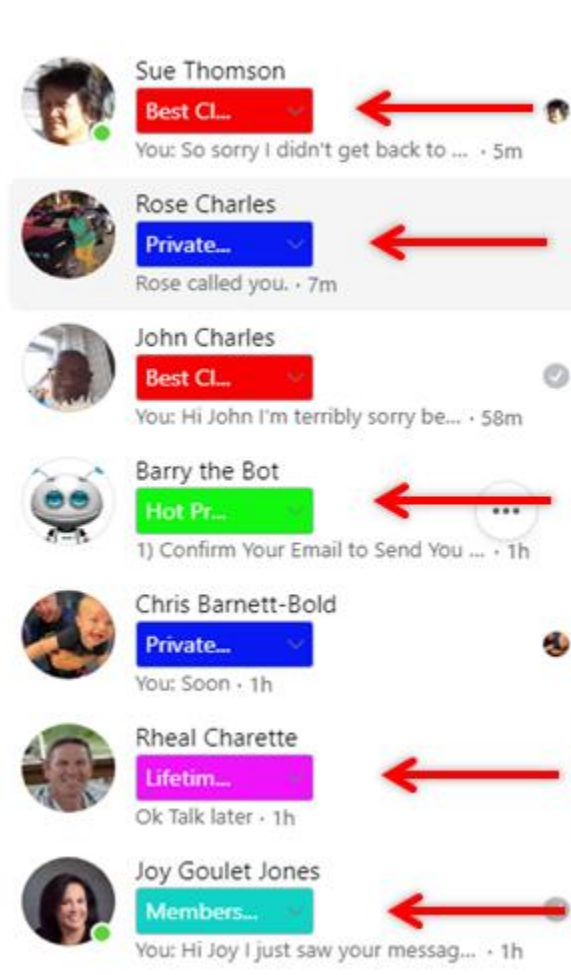
Lead Closer CRM allows you to sort your FB Contacts into Groups (what we call ‘Labels’). You can color code your Labels and put your contacts into different Labels.

Creating Labels allows you to easily see your contacts with Color Coded Labels when using Messenger.

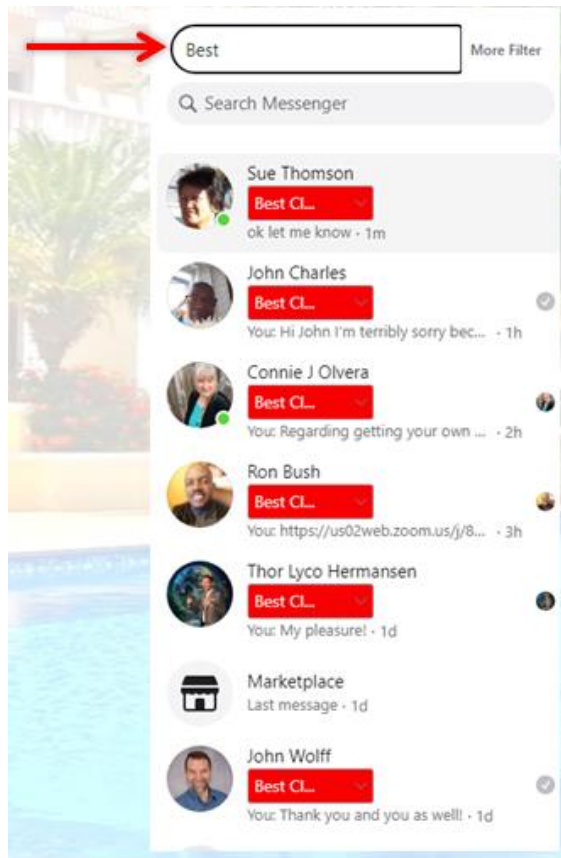
Messenger WITHOUT Lead Closer CRM



Messenger WITH Lead Closer CRM with Color Coded Labels to EASILY Identify Contacts

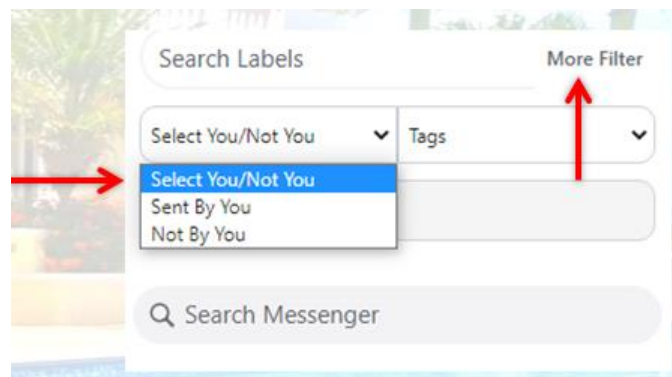


Filter Labels to Quickly Sort Contacts

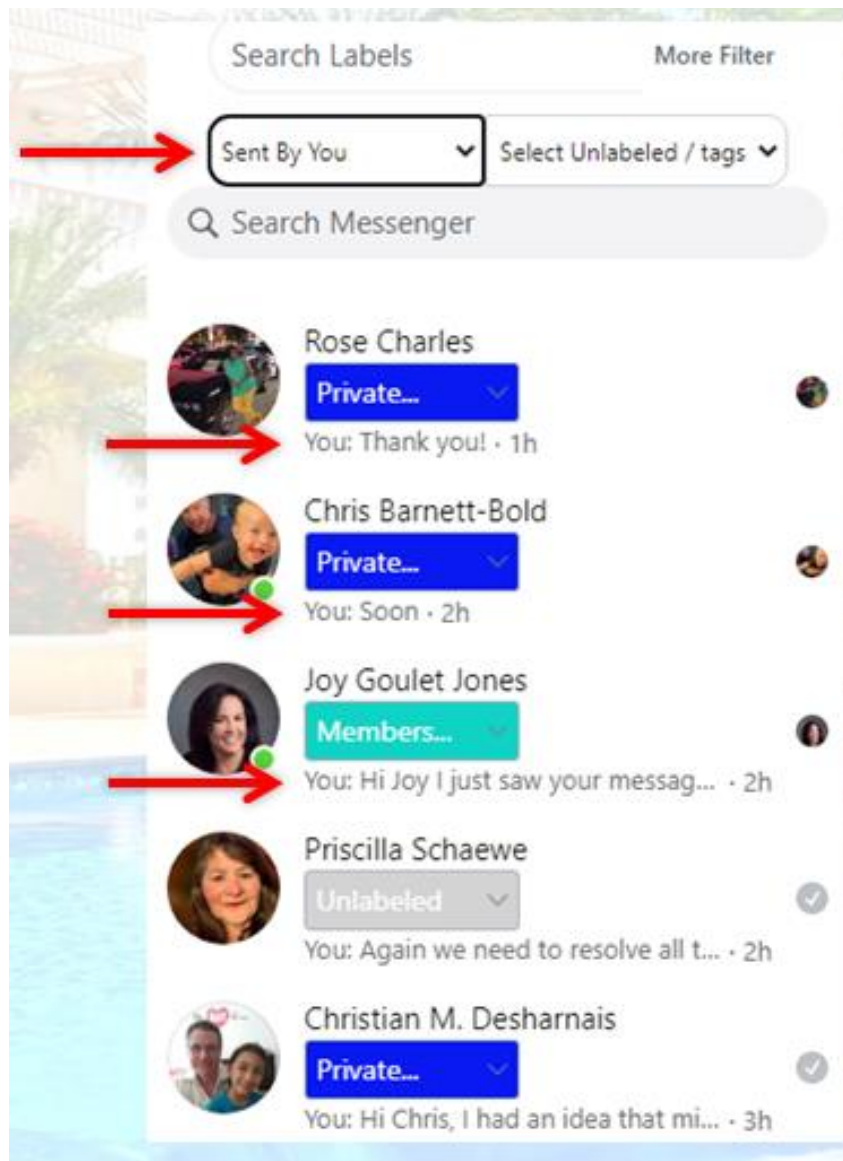


Additional Filters help you sort messages

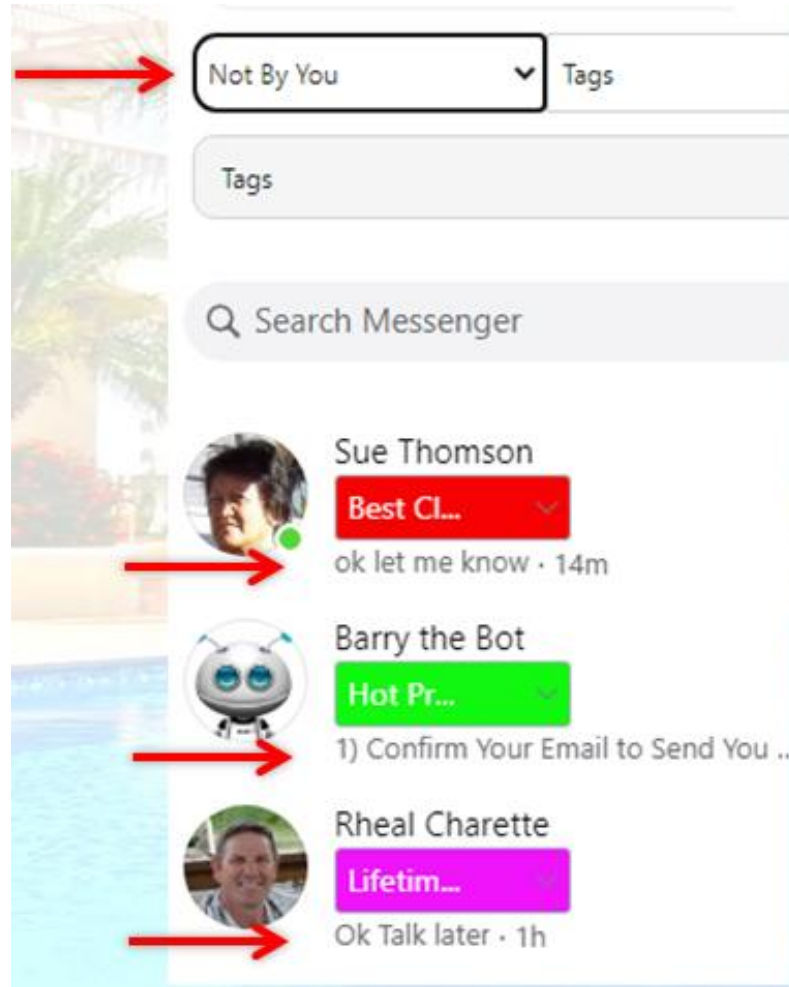
- Sent by You
- Not by You



'Sent by You' Messages tell you who has NOT responded to you so you remember to follow up with them again.

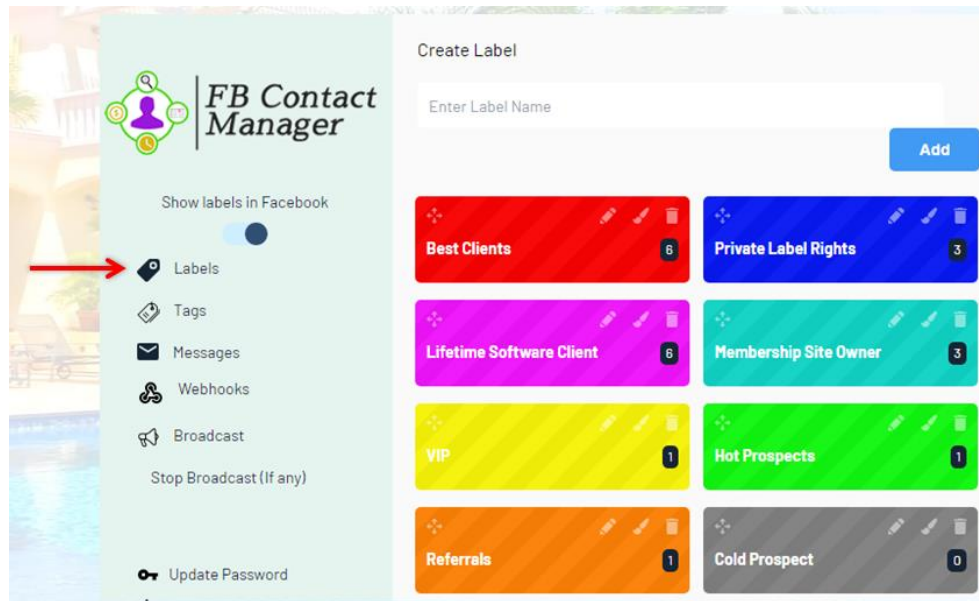


'Not by You' Messages remind you who you did not respond to (i.e. who you need to follow up with).

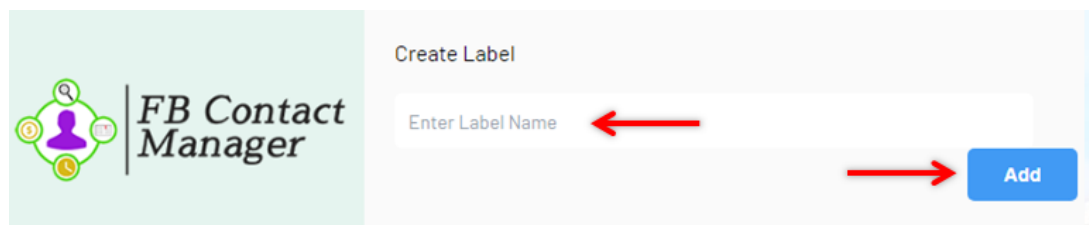


Creating Labels

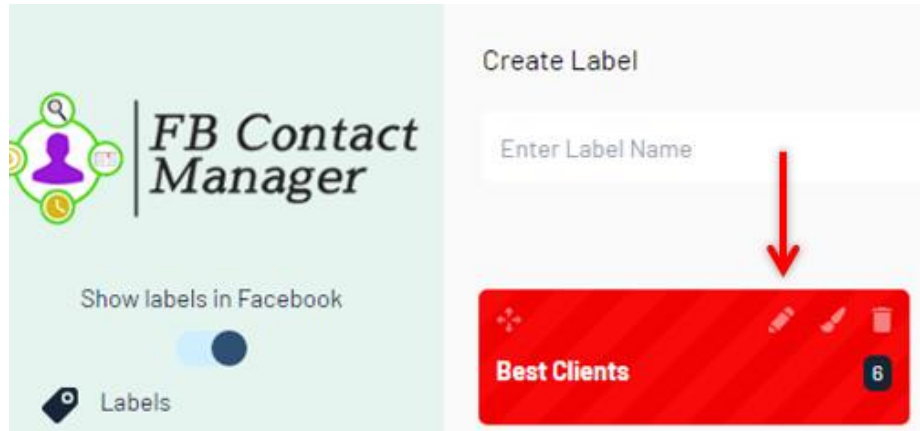
1) First click on 'LABELS' in the navigation menu



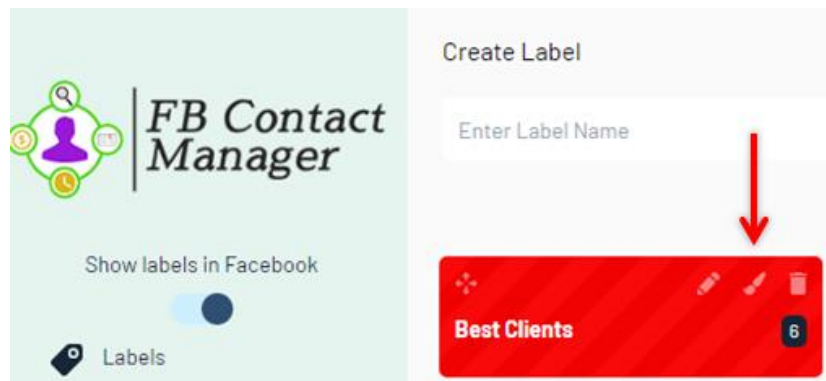
2) Enter a Label Name and then click ADD



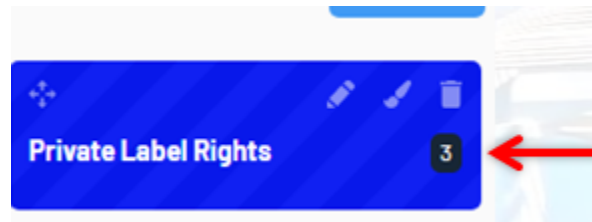
3) You can EDIT the NAME of your Labels at any time (just click on the pencil icon).



4) You can EDIT the COLOR of your Labels at any time (just click on the paint brush icon).



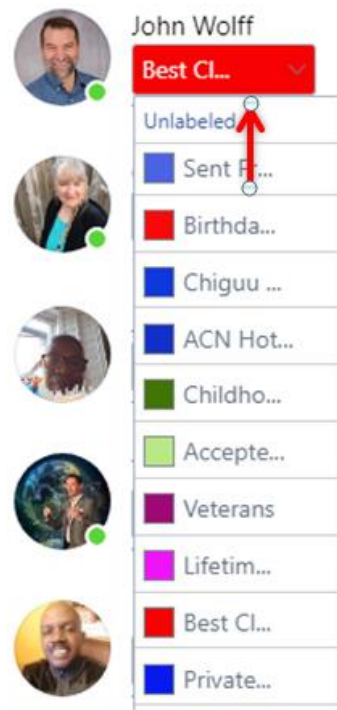
5) You can see the Number of Contacts in each Label.



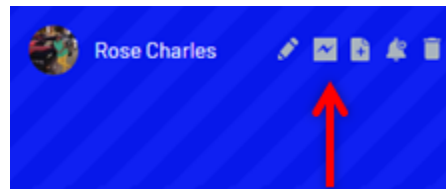
6) You can EDIT which Label a person belongs to



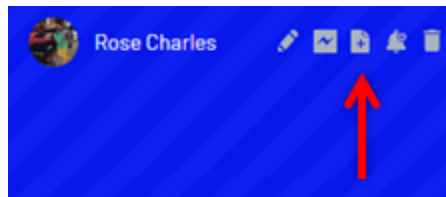
7) You can also edit which Label someone belongs to when you are in Messenger by clicking on the Label.



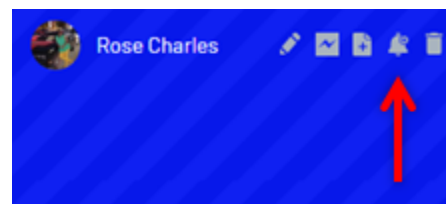
8) Easily initiate a Message to any contact (Messenger)



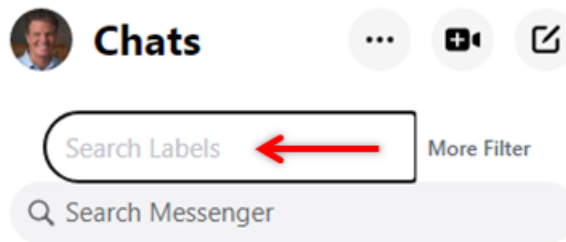
9) Easily record NOTES for more Effective Follow Up



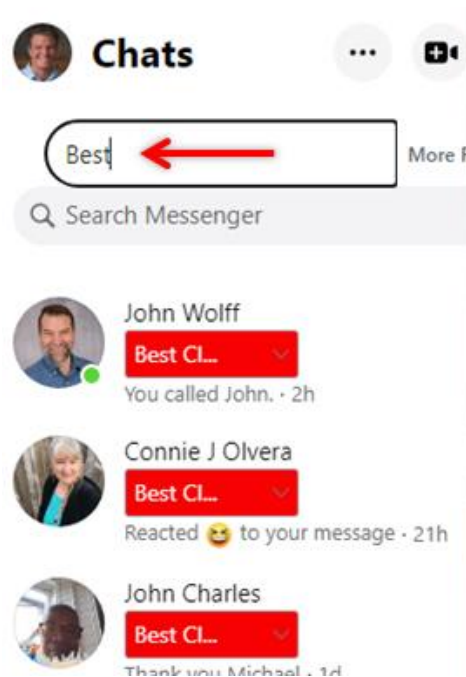
10) Easily record NOTIFICATIONS (reminders) to Follow Up



11) To SORT your contacts by LABEL, go to Messenger and click on “Search Labels” which is right above “Search Messenger”. Then enter the name of the Label you want to SORT.



For example, if I were to type in “Best” then my “Best Clients” Label would appear (which is color coded making it very easy to focus on my best clients).



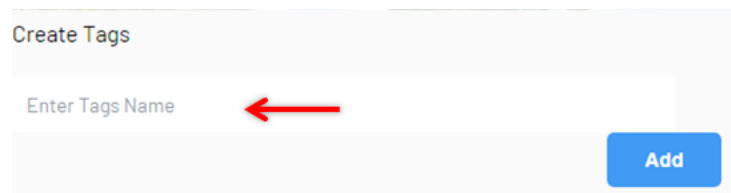
Tags

Tags work like Labels but allow you to have unlimited Tags per contact. Tags can be used for things like “Products Purchased”, or “Action Taken” etc. so you can then sort your contacts.

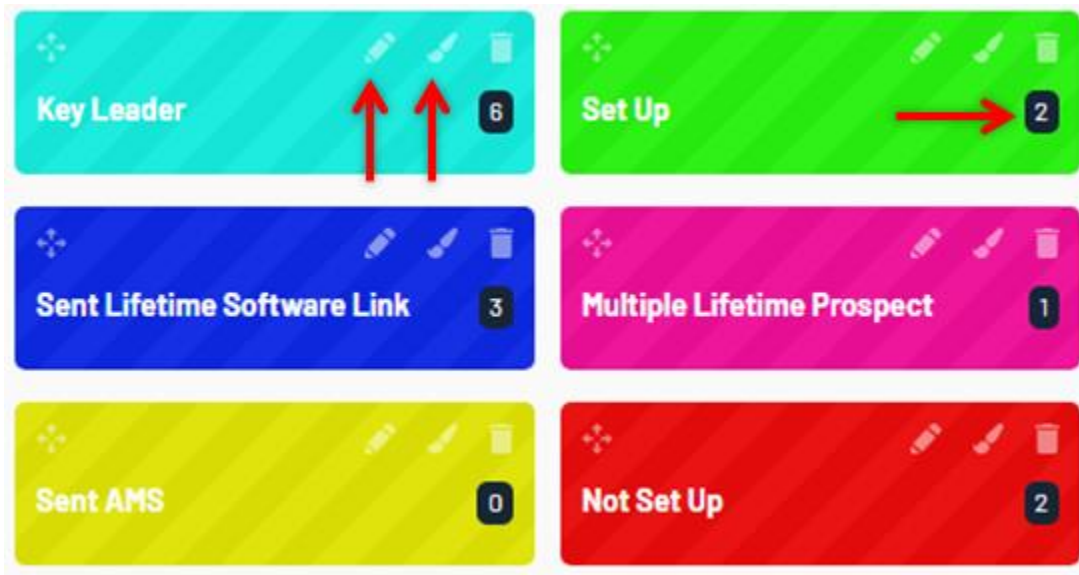
1) To use Tags click on ‘Tags’ from the navigation menu.



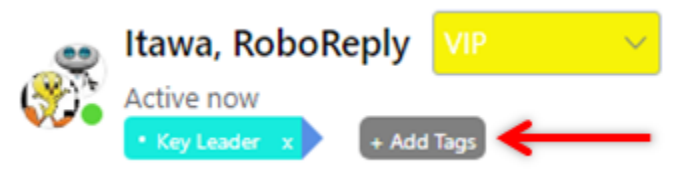
2) To create a NEW Tag simply enter the name of the Tag you want in the upper right hand corner and then click on Add.

A screenshot of the 'Create Tags' form. The title 'Create Tags' is at the top left. Below it is a text input field with the placeholder text 'Enter Tags Name'. A red arrow points to the right side of this input field. At the bottom right of the form is a blue button labeled 'Add'.

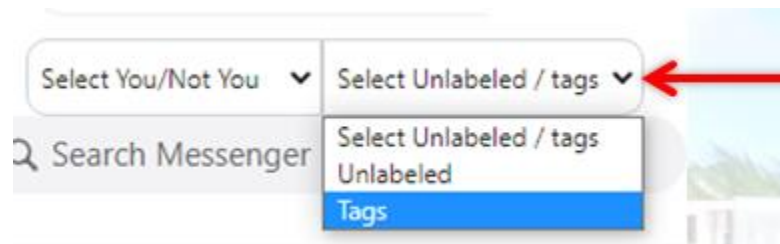
3) Just like with Labels, you can easily edit the NAME of the Tag, the COLOR of the Tag, and see how many people are in each Tag.



4) To assign people to a Tag, go to Messenger and at the top of the page where you see their name, you will see a “Add Tags” button. Click it and then you will see the list of all Tags and select what you want. You can add as many tags as you want to each contact.



5) To SORT your contacts by Tag, go to Messenger and in the Upper Left hand corner of the page click on “Select Unlabeled/Tags” and from the drop down select ‘Tags’. This will allow you to see all your contacts at a glance with a specific Tag.



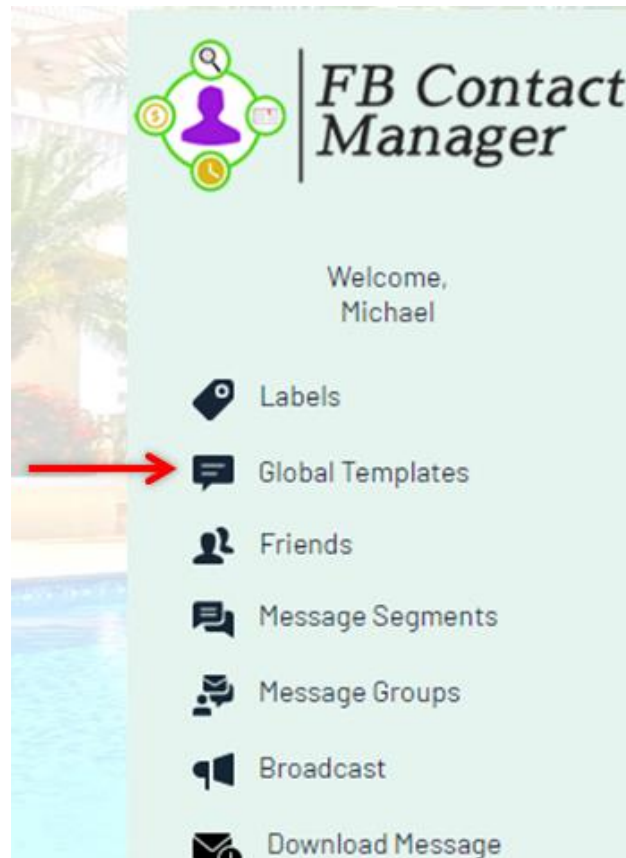
Global Templates

Global Templates are CATEGORIES that you can put Individual Messages to send contacts. It helps you to much better organize your messages saving you time and making you a lot more efficient.

As well, if you have a Team of people, Global Templates and all their messages inside of them can be shared with others helping your team to duplicate your best practices!

You can have an UNLIMITED number of Global Templates and an UNLIMITED number of Messages in EACH Global Template.

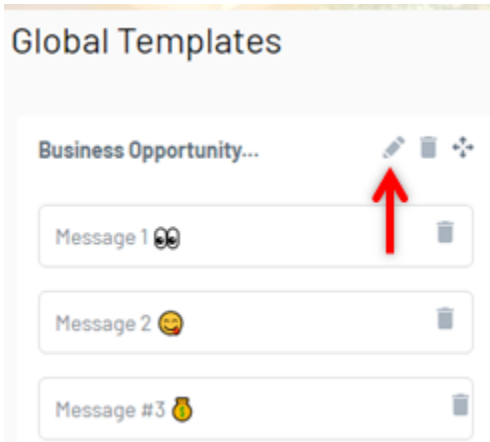
1) Click on “Global Templates” from the navigation menu



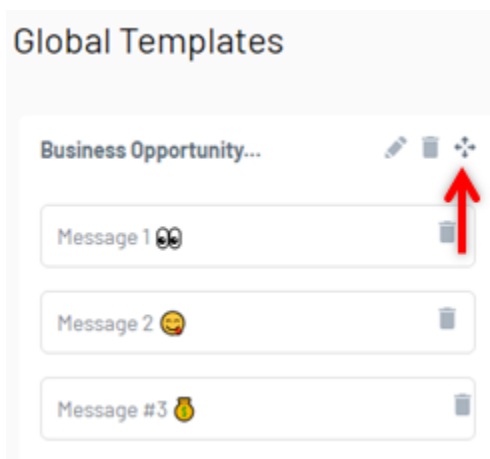
2) In the Upper Right Hand corner of the page, enter the name of your new Global Template and click on Add.

A form for adding a new Global Template. It features a text input field with the placeholder text 'Global Templates Name'. To the right of the input field is a blue button with the text 'Add'. A red arrow points upwards towards the bottom center of the input field.

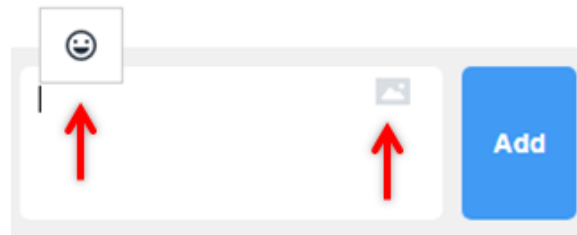
3) Once you have a Global Template, you can easily EDIT the name at any time by clicking on the pencil icon.



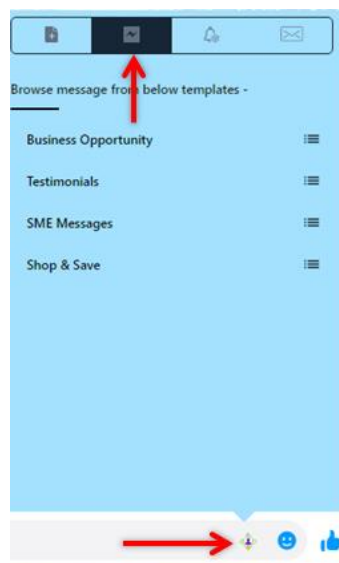
4) You can easily MOVE the location of Global Templates by clicking on the cross icon and dragging it where you want.



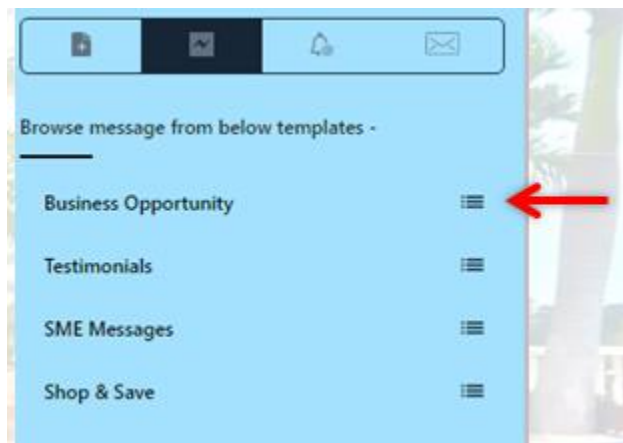
5) You can ADD individual messages in a Global Template by entering your message and clicking Add. You can click on the emoticon and image icons to add emoticons and images.



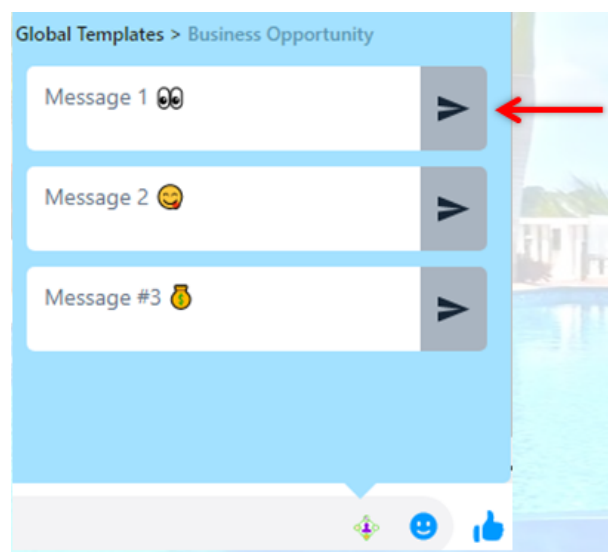
6) Once you have the Global Templates and individual messages that you want, then when using Messenger you can easily access them by first clicking on the icon for Lead Closer CRM (in the lower right hand corner of your message) then clicking on the 2nd column. This will display all your Global Templates.



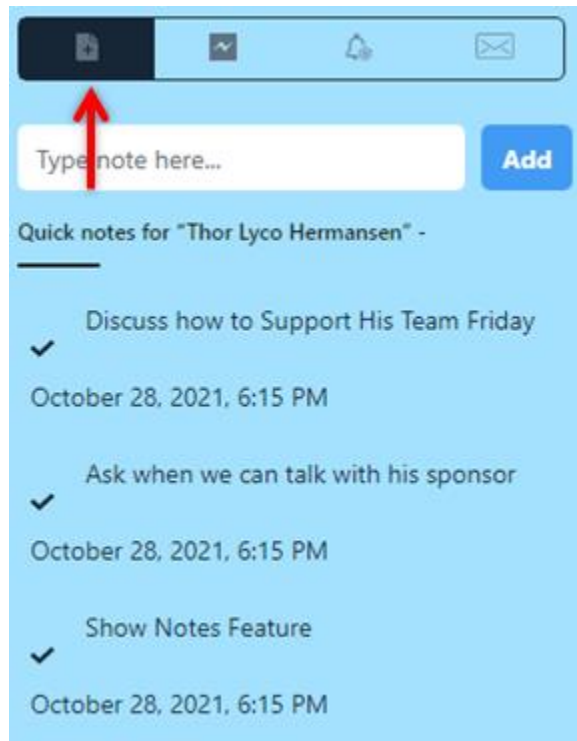
7) To then see individual messages you need to click on the 3 lines which then will display all the messages for a specific Global Template.



8) Clicking on the 3 lines will then show all the individual messages for a specific Global Template. To send a message click on the arrow which will put the message in the send tray at the bottom of the page.



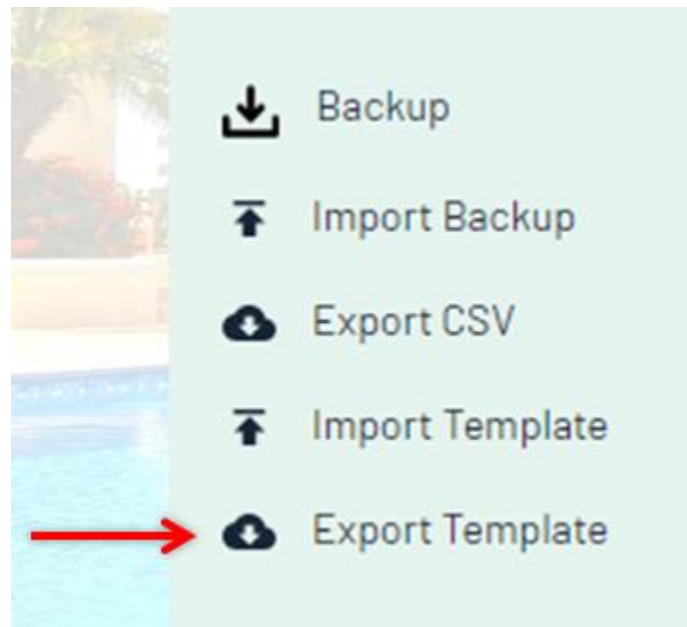
9) Another very valuable feature when sending messages in Messenger is to see all the NOTES you have for a contact. Click on the 1st column to see all the Notes. You can also add a new note by typing it in and clicking Add.



Leverage and Duplication

If you have a team of people and want to share Global Templates and all messages inside of them, then you will LOVE our EXPORT and IMPORT Template feature.

- 1) To share your Global Templates, individual messages (as well as your Labels), first click on 'Export Template'.

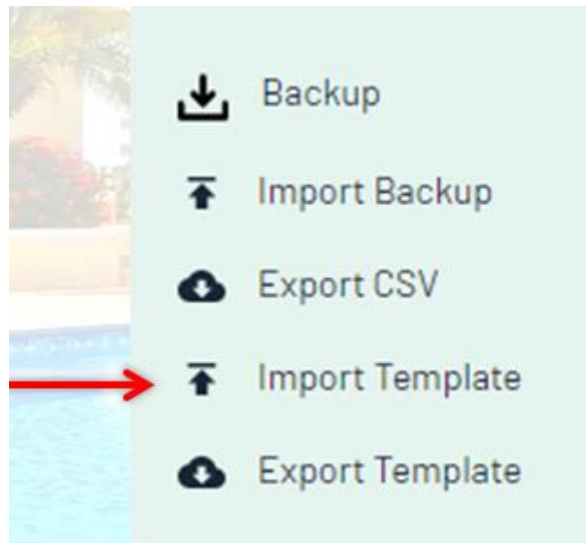


- 2) We will automatically create and SAVE a file for you which you can save where you want on your computer. To share with someone else you will need to send them the file.

3) When someone on your team wants to RECEIVE your Global Templates and Individual Messages, they will go to 'Import Template'.

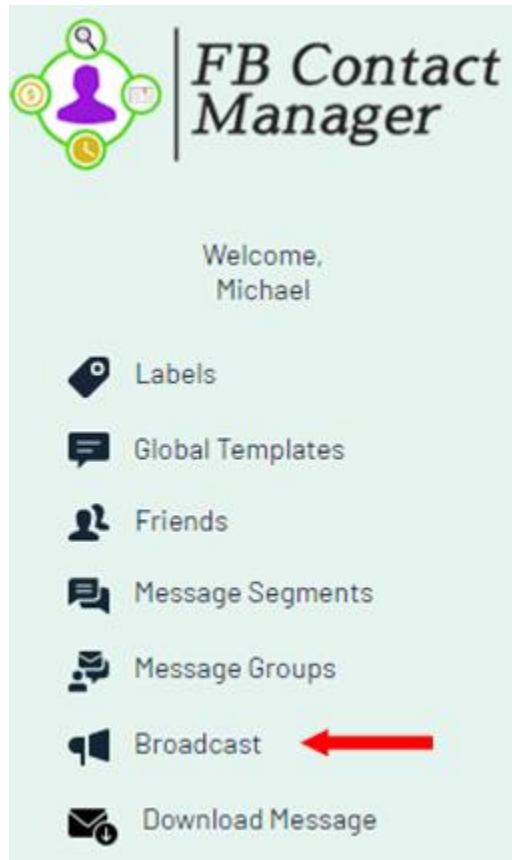
After clicking on it they will need to select the file that you send them (the one you exported).

Exporting and Importing allows your team to DUPLICATE your efforts WITHOUT needing to create the ideal marketing messages themselves!

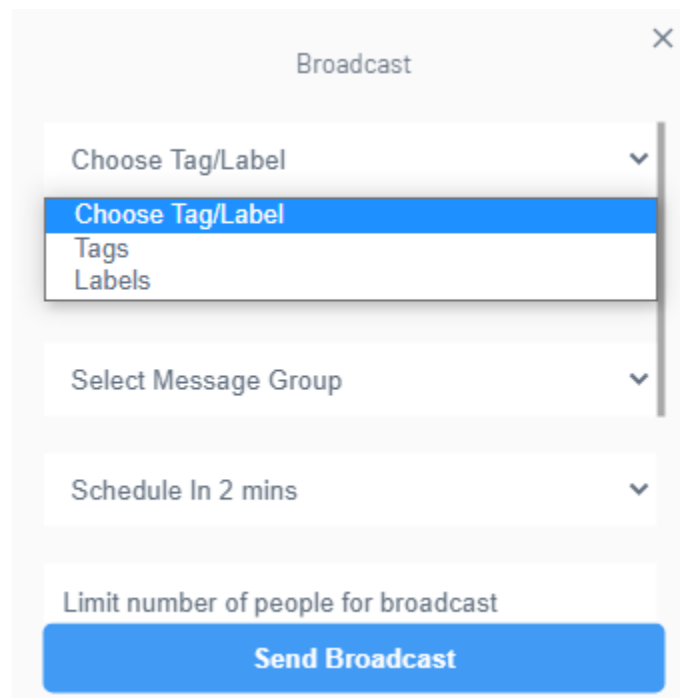


Broadcasting Messages

1) Select Broadcast from the Navigation Menu



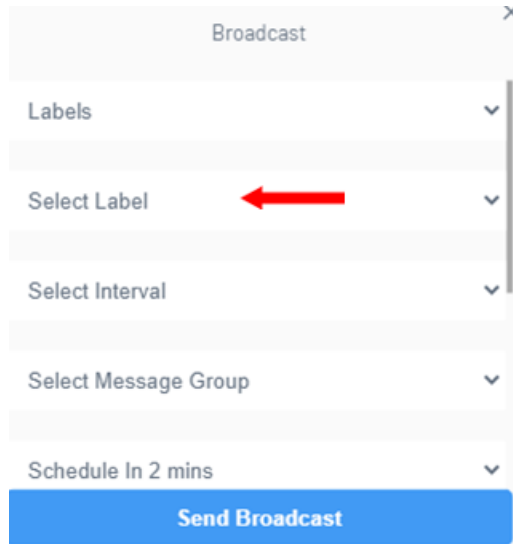
2) Then you will have options to choose to determine what messages are sent and to whom. The first choice is if you want to select “Tags” or “Labels”. A “Label” is more of a higher level Category (for example “Best Clients” and a “Tag” could be for details about those clients such as the names of products purchased etc.



The image shows a 'Broadcast' dialog box with a close button (X) in the top right corner. It contains several dropdown menus and a button:

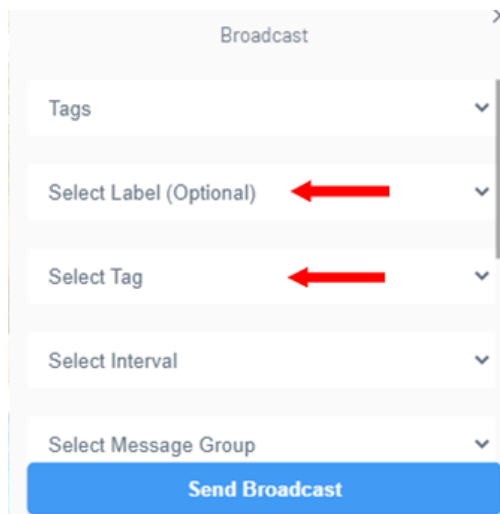
- Choose Tag/Label**: A dropdown menu with a downward arrow. The menu is open, showing three options: 'Choose Tag/Label' (highlighted in blue), 'Tags', and 'Labels'.
- Select Message Group**: A dropdown menu with a downward arrow.
- Schedule In 2 mins**: A dropdown menu with a downward arrow.
- Limit number of people for broadcast**: A text input field.
- Send Broadcast**: A blue button with white text.

3) If you selected “Labels” then you would be prompted to click to select which specific Label you want. This assumes that you have put your contacts in specific Labels.



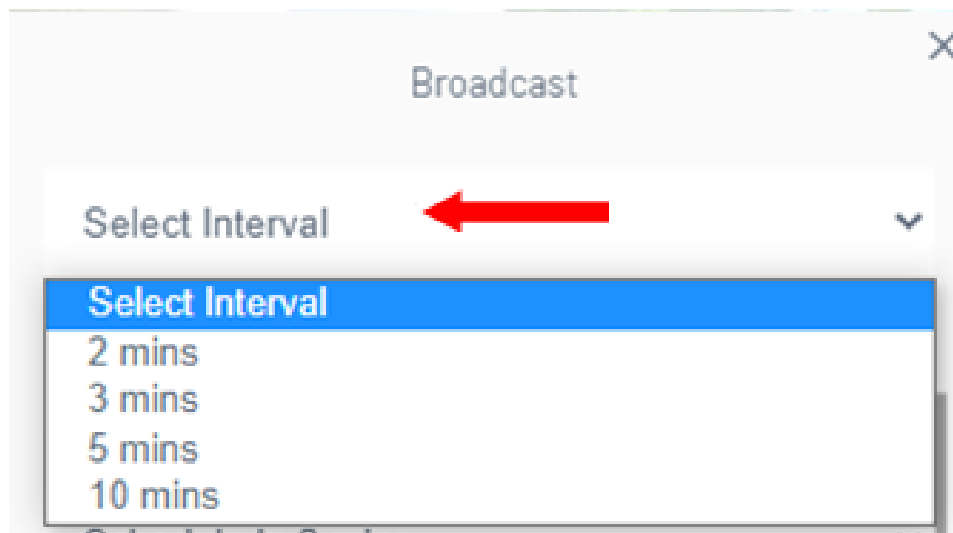
A screenshot of a 'Broadcast' dialog box. The dialog has a title bar with 'Broadcast' and a close button (X). Below the title bar, there are several dropdown menus: 'Labels', 'Select Label', 'Select Interval', 'Select Message Group', and 'Schedule In 2 mins'. A red arrow points to the 'Select Label' dropdown menu. At the bottom of the dialog is a blue button labeled 'Send Broadcast'.

4) If you first chose “Tags” then as an option you can also select a Label and you will be prompted to select which Tag you want.



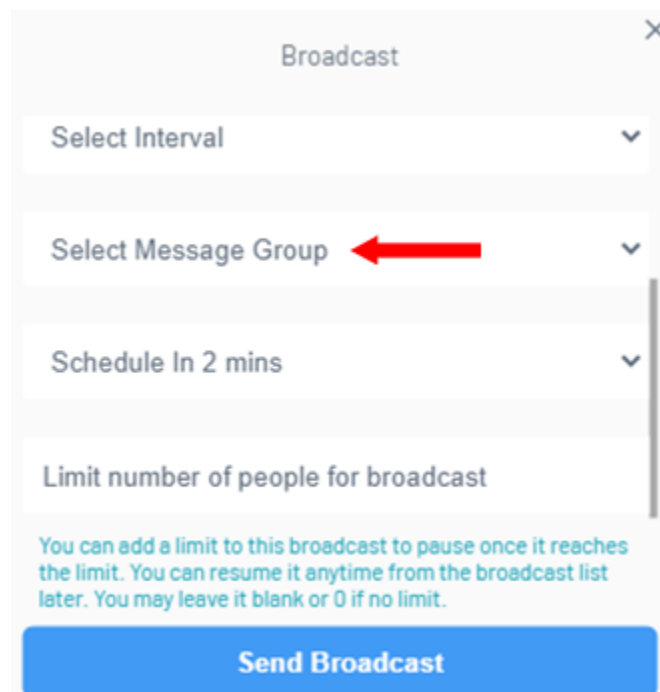
A screenshot of a 'Broadcast' dialog box. The dialog has a title bar with 'Broadcast' and a close button (X). Below the title bar, there are several dropdown menus: 'Tags', 'Select Label (Optional)', 'Select Tag', 'Select Interval', and 'Select Message Group'. Red arrows point to the 'Select Label (Optional)' and 'Select Tag' dropdown menus. At the bottom of the dialog is a blue button labeled 'Send Broadcast'.

5) Then you will be prompted to “Select Interval” which is the delay between each message. **The longer the interval the better and I would suggest making it as long as possible to complete within a day.**



6) Next you will be prompted to select your “Message Group” which is the combination of Message Segments. Please make sure you have at least 5 different messages in a “Segment” and ideally at least 2 Segments so that your “Message Group” will send 1 of your messages from Segment 1 and 1 of your messages from Segment 2. This way every message should be different so Facebook doesn’t see you using automation.

To learn more about creating Segments, Messages inside of Segments, and Groups, please view our Support Site where we have Instructional Videos or review the Step by Step Instructions for Lead Prospector.



Broadcast

Select Interval

Select Message Group

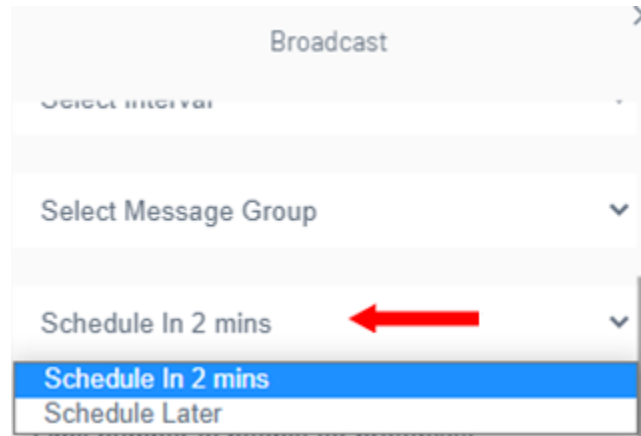
Schedule In 2 mins

Limit number of people for broadcast

You can add a limit to this broadcast to pause once it reaches the limit. You can resume it anytime from the broadcast list later. You may leave it blank or 0 if no limit.

Send Broadcast

7) Next you are prompted if you want to start the Broadcast in 2 minutes or schedule for a later time.



8) Then you are prompted to select the number of people you want to broadcast. I wouldn't broadcast to a large number of people at once but instead use a LIMIT which will PAUSE the broadcast allowing you to resume later.

