LEAD TOOLBOX
Using the CRM features:

Step 1: Log In to Lead Toolbox
- Go to the Lead Toolbox login page.
- Enter your credentials (username and password) and click Login.

Step 2: Access the CRM Section
- After logging in, you'll be directed to the Lead Toolbox Dashboard.
- From the left-hand sidebar, click on "CRM" under the "Sales" section. This will take you to the CRM dashboard where you can manage all your contacts, leads, and customer data.

Step 3: Adding a New Contact
- Add Contact Manually:
  - Click on "Contacts" in the CRM menu.
  - On the top right, click the "Add Contact" button.
  - Fill out the contact's details in the fields provided, such as:
    - First Name
    - Last Name
    - Email Address
    - Phone Number
    - Tag (Use tags to categorize contacts by lead type, campaign, etc.)
    - Custom Fields (If you have any custom fields, fill them in here for additional information, like "Lead Source" or "Preferred Product")
  - After filling out the contact details, click 'Save Contact'.
- Import Contacts:
- If you have a list of contacts to import, click the "Import" button from the Contacts screen.
- Upload a CSV file containing your contact data and map the columns in your CSV to Lead Toolbox's fields (e.g., First Name, Email, Phone Number).
- After reviewing the mapping, click 'Import Contacts'.

Step 4: Organizing Your Contacts (Tags, Lists, Filters)
- Create a New Opportunity:
  - Navigate to the "Opportunities" tab within the CRM section.
  - Click Add Opportunity.
  - Select an existing contact or create a new one, and enter information about the opportunity (e.g., deal size, potential revenue).
  - Choose the Pipeline and Stage (e.g., "New Lead," "Negotiation," "Closed").
  - Click Save to create the opportunity.
- Track Opportunities Through the Pipeline:
  - Pipelines represent the stages of the sales process (e.g., New Lead → Contacted → Qualified → Proposal → Closed).
  - Go to the Pipelines tab, where you can see all active opportunities displayed in their respective stages.
  - To move an opportunity through the pipeline, simply drag and drop it to the next stage.
  - You can assign tasks, set reminders, and add notes to each opportunity to track progress.

Step 5: Managing and Tracking Deals (Opportunities)
- Create a New Opportunity:
  - Navigate to the "Opportunities" tab within the CRM section.
  - Click Add Opportunity.
  - Select an existing contact or create a new one, and enter information about the opportunity (e.g., deal size, potential revenue).
  - Choose the Pipeline and Stage (e.g., "New Lead," "Negotiation," "Closed").
  - Click Save to create the opportunity.
- Track Opportunities Through the Pipeline:
  - Pipelines represent the stages of the sales process (e.g., New Lead → Contacted → Qualified → Proposal → Closed).
  - Go to the Pipelines tab, where you can see all active opportunities displayed in their respective stages.
  - To move an opportunity through the pipeline, simply drag and drop it to the next stage.
  - You can assign tasks, set reminders, and add notes to each opportunity to track progress.

Step 6: Automating Tasks and Follow-Ups
- Create Automated Workflows:
  - Lead Toolbox's workflow automation allows you to create automated follow-ups and task assignments.
  - Go to Automation in the left sidebar and click on "Workflows".
  - Click Create New Workflow and give it a name (e.g., "Follow-Up Workflow").
- Add Workflow Triggers:
  - Set up triggers that automatically start the workflow. Examples include:
    - Form Submission: When a lead fills out a form.
    - Tag Added: When a specific tag is added to a contact (e.g., "Lead").
    - Status Change: When the opportunity moves to a new pipeline stage.
- Add Actions:
  - Actions in workflows include:
    - Send Email/SMS: Send automated emails or SMS messages to contacts.
    - Assign Tasks: Automatically create tasks for your team to follow up with the contact.
    - Update Contact Fields: Automatically change tags, update the status, etc.
    - Delay Actions: Add delays between actions to space out follow-up emails or reminders.
- Activate the Workflow:
  - After building your workflow, click Save and Activate it.

Step 7: Managing Communication (Inbox)
- Inbox (Conversations):
  - Lead Toolbox's Inbox consolidates all communication (email, SMS, etc.) in one place.
  - Navigate to "Inbox" in the CRM section to view and respond to messages from contacts across multiple platforms.
- Sending Emails/SMS:
  - You can send individual or bulk emails/SMS directly from the Inbox by selecting a contact.
  - When replying to a contact, you can type a message and choose whether to send it via email, SMS, or both.

Step 8: Tracking and Managing Interactions (Notes & Activity)
- Adding Notes:
  - For each contact or opportunity, you can add Notes to track interactions, key details, or future follow-up reminders.
  - In the contact's profile, go to the Notes section and click Add Note.
- Activity Log:
  - Lead Toolbox logs every interaction, including form submissions, email opens, and clicks.
  - You can review the activity log for each contact or opportunity to understand the history of interactions.

Step 9: Reporting and Analytics
- CRM Dashboard Analytics:
  - Lead Toolbox provides real-time data about your sales and leads.
  - From the CRM dashboard, view key metrics such as, Lead Conversion Rates, Revenue per Opportunity, Pipeline Overview and Task Completion Rates.
- Custom Reports:
  - You can generate custom reports based on CRM data.
  - Go to "Reports" in the left-hand sidebar to create and view reports on contact interactions, email engagement, sales conversions, and more.

Step 11: Ongoing Contact and Pipeline Management
- Ongoing Contact Management:
  - Continuously monitor and update your contacts' information as they move through the pipeline.
  - Use tags and custom fields to keep track of specific details about each contact.
- Optimizing Your Sales Process:
  - Continuously analyze pipeline data and lead conversion rates to optimize your sales process.
  - Use Lead Toolbox's A/B testing and analytics to improve your workflows and engagement.