LION DESK

The New Home of The Thorn Collection

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THE NEW HOME OF THE THORN COLLECTION

Section One: Profiles

Section Two: Contacts Page - Contact Organization - Adding Contacts

Section Three: Searching Contacts - Quick Edits

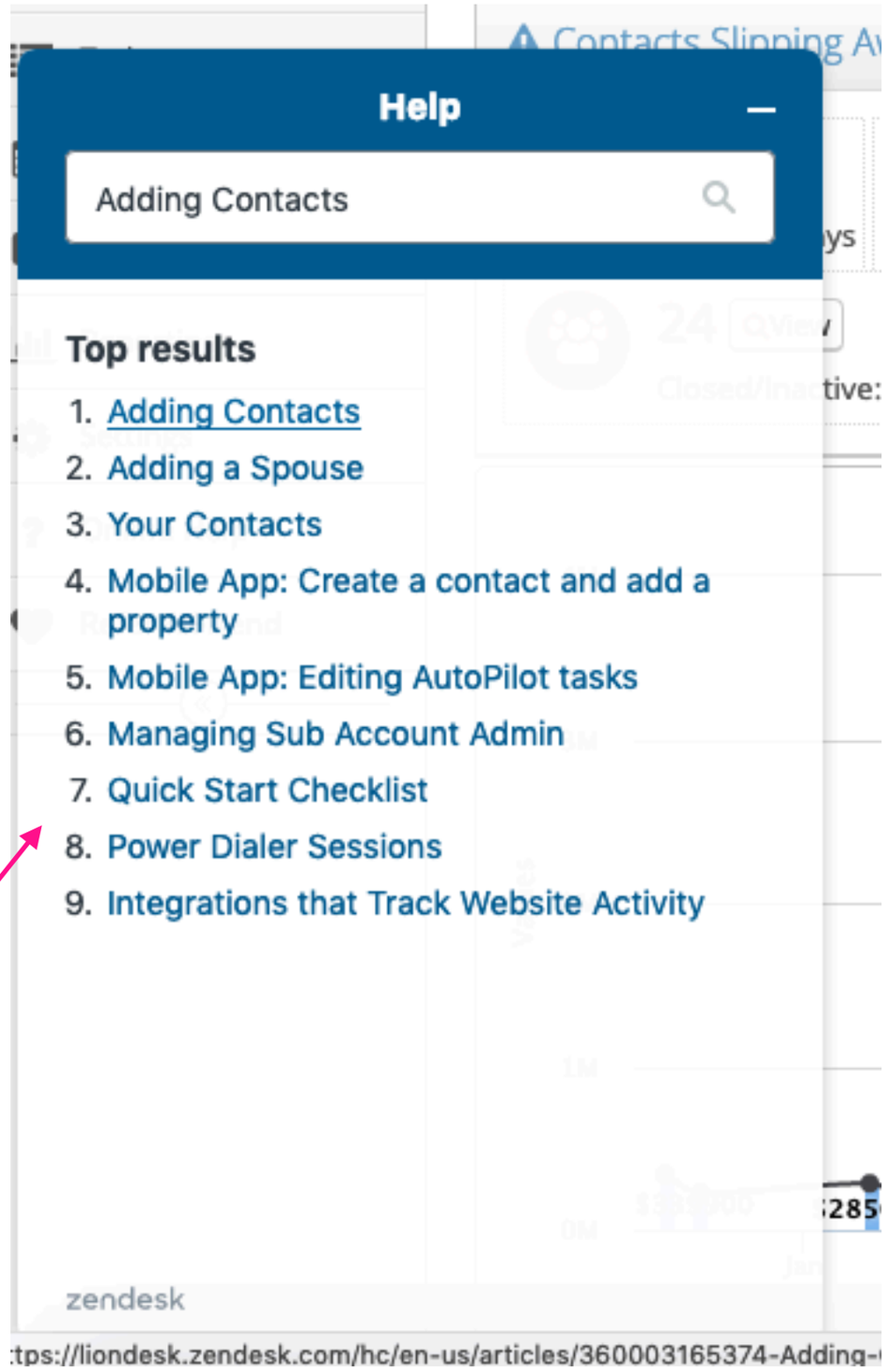
Section Four: The Lion Desk App

HELP is always just a click away!

1.) This icon is in the bottom left hand side of EVERY screen.

2.) When you click "Help" this box appears.

3.) Type your question or a general term and either step by step instructions, help articles, or videos will appear.



If all else fails, Lion Desk has great phone support!

1-760-501-8582 then press “2”

SECTION ONE

Profiles

The profile page has several boxes with information that will auto populate different functions within Lion Desk including:

1.) Your Phone Number - Needed to make calls directly from Lion Desk.

2.) Your Picture - Appears on your public Lion Desk webpages.

3.) Your Introduction - Appears on your public Lion Desk webpages.

4.) Your Email Signature - Appears at the bottom of any emails that you send from Lion Desk.

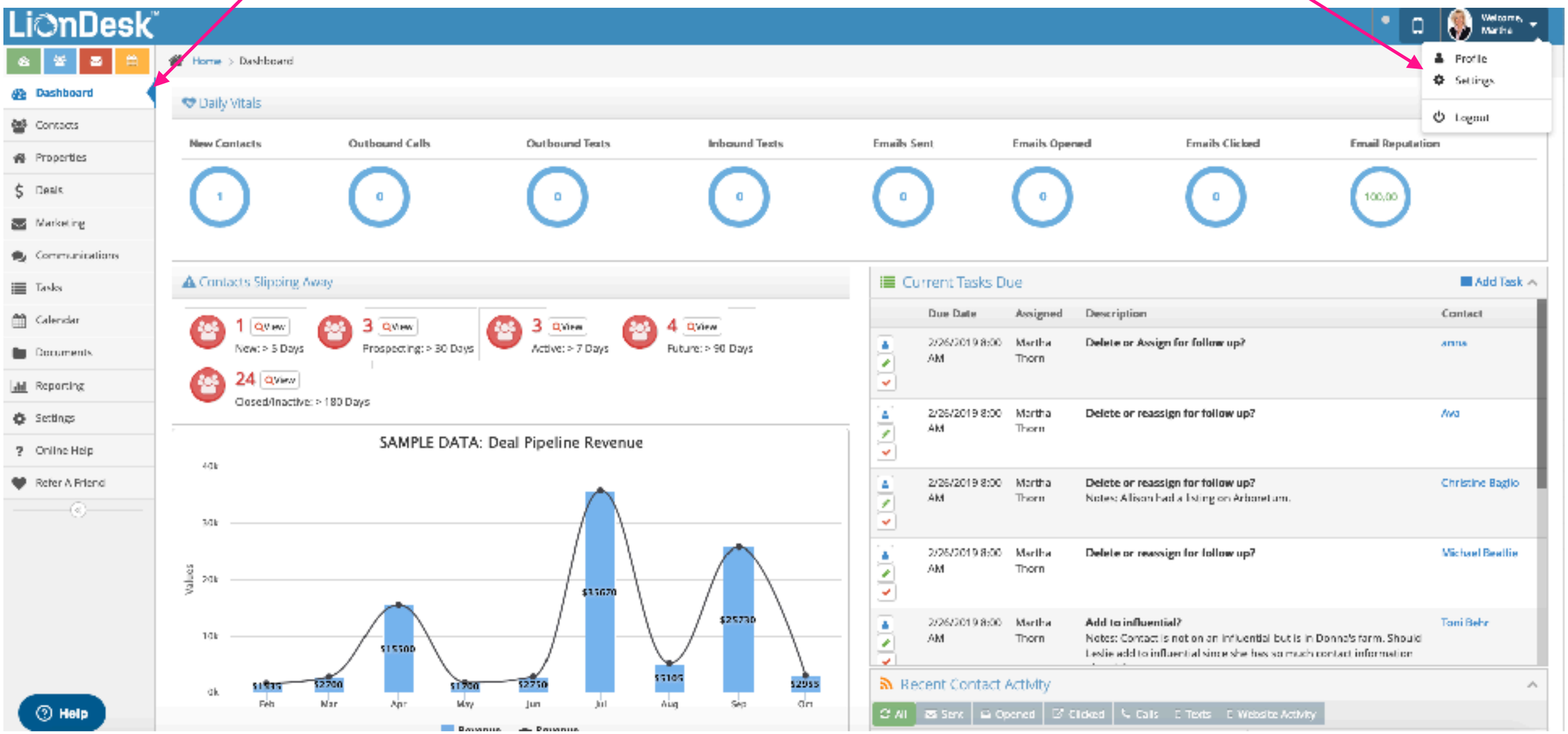
5.) Your Direct Mail Sender Address - Will be printed on any direct mail sent from Lion Desk.

Once you complete your profile today, you should not ever need to make changes.

Below is your "Dashboard". The dashboard is your welcome screen every time you log into Lion Desk.

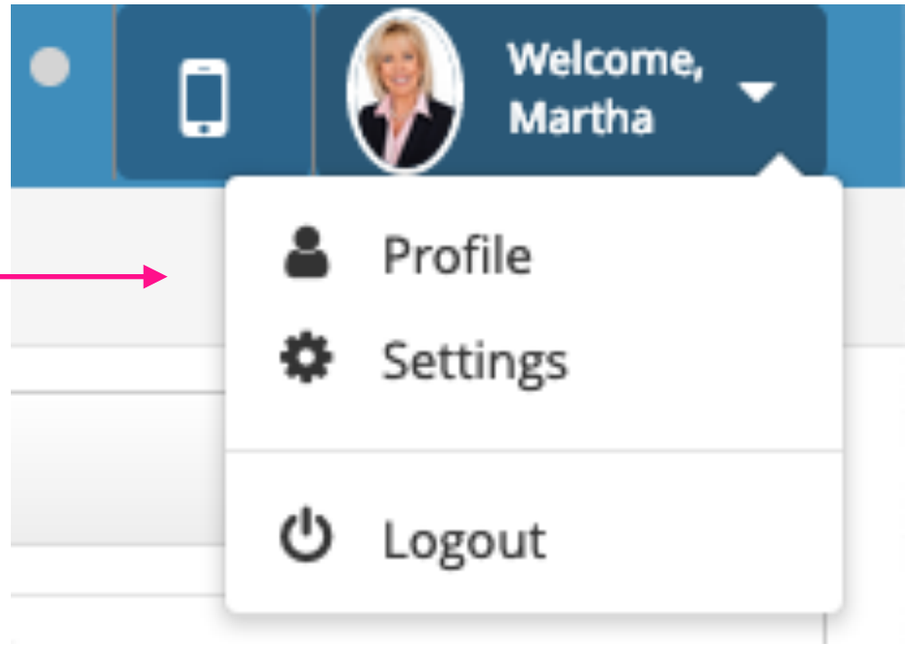
On the left hand side of the screen you have your navigation menu.

On the right hand side, you can access your Profile and Settings.

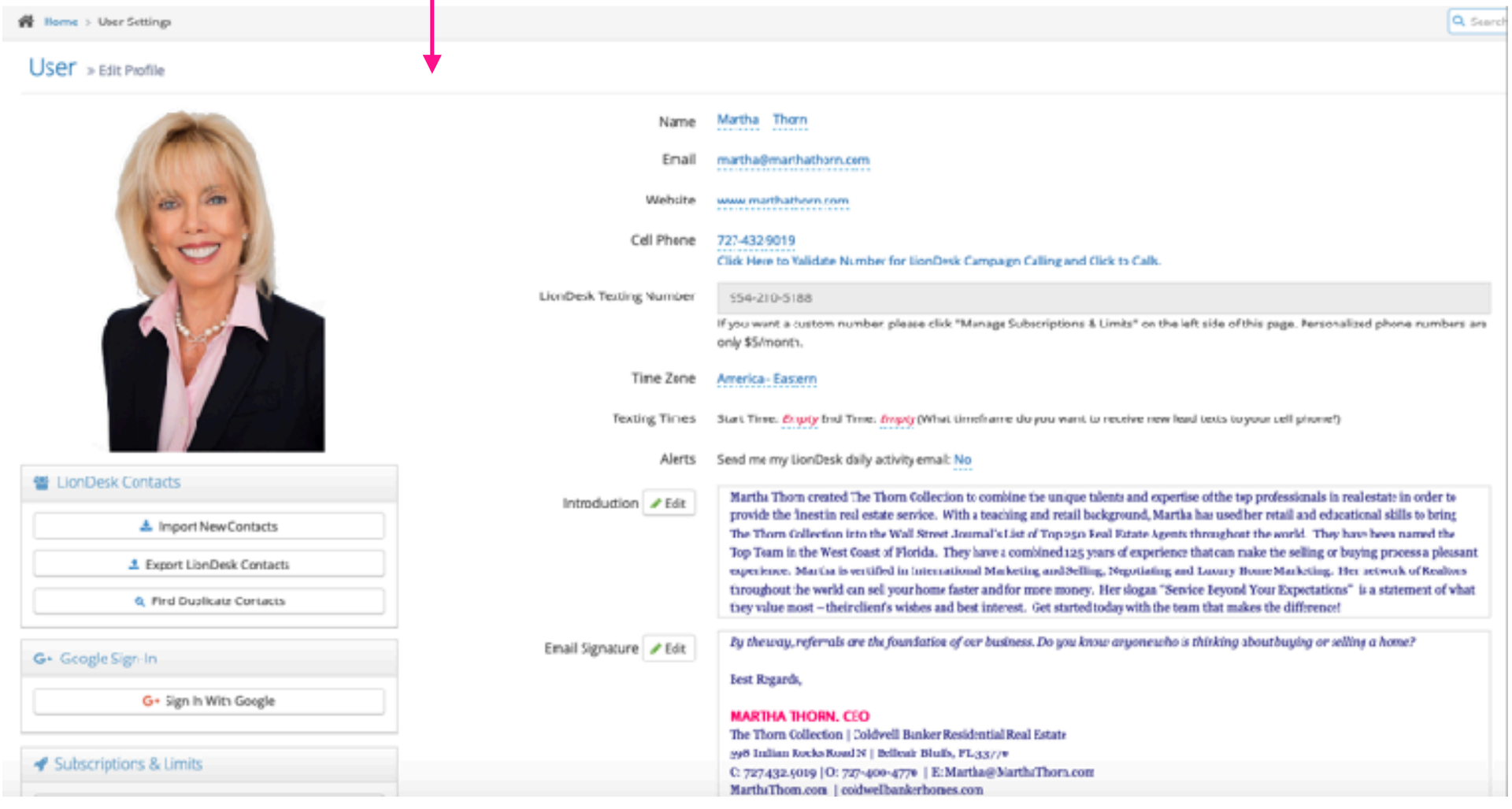


If you ever feel lost, just click on "Dashboard" and you will be back to the main screen.

Today, we will start by completing everyone's profiles. Click profile.

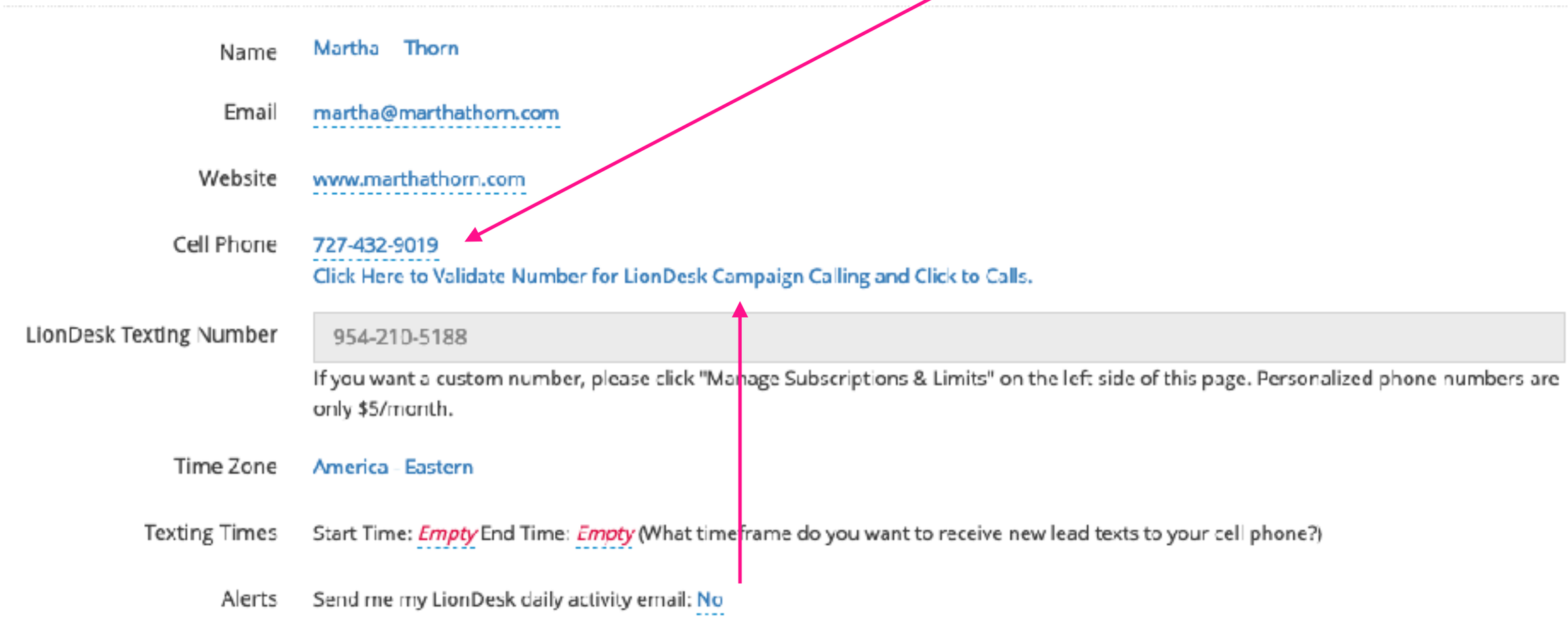


Your profile will then appear.



1.) Your Phone Number

1.) Click on the phone number that appears.



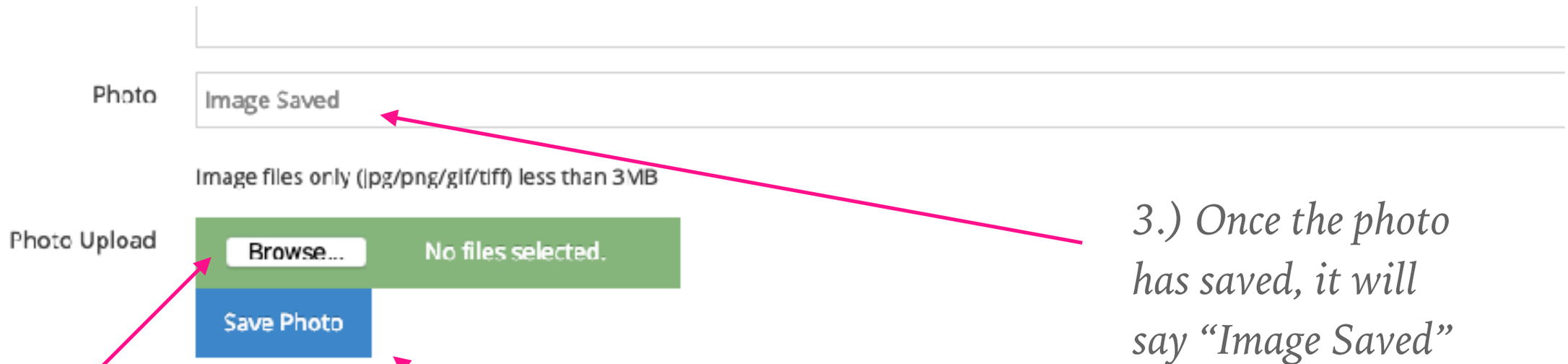
2.) Input your phone number and click on the blue check box that appears.

3.) Click on "Click Here To Validate Number…."

4.) Lion Desk will call you to confirm your phone number.

Once your phone number has been verified, any calls you want to make directly from Lion Desk will ring through to your clients showing your phone number.

2.) Your Picture



1.) Click Browse and select the photo that you would like to use.

2.) Click Save Photo Once the photo has loaded.

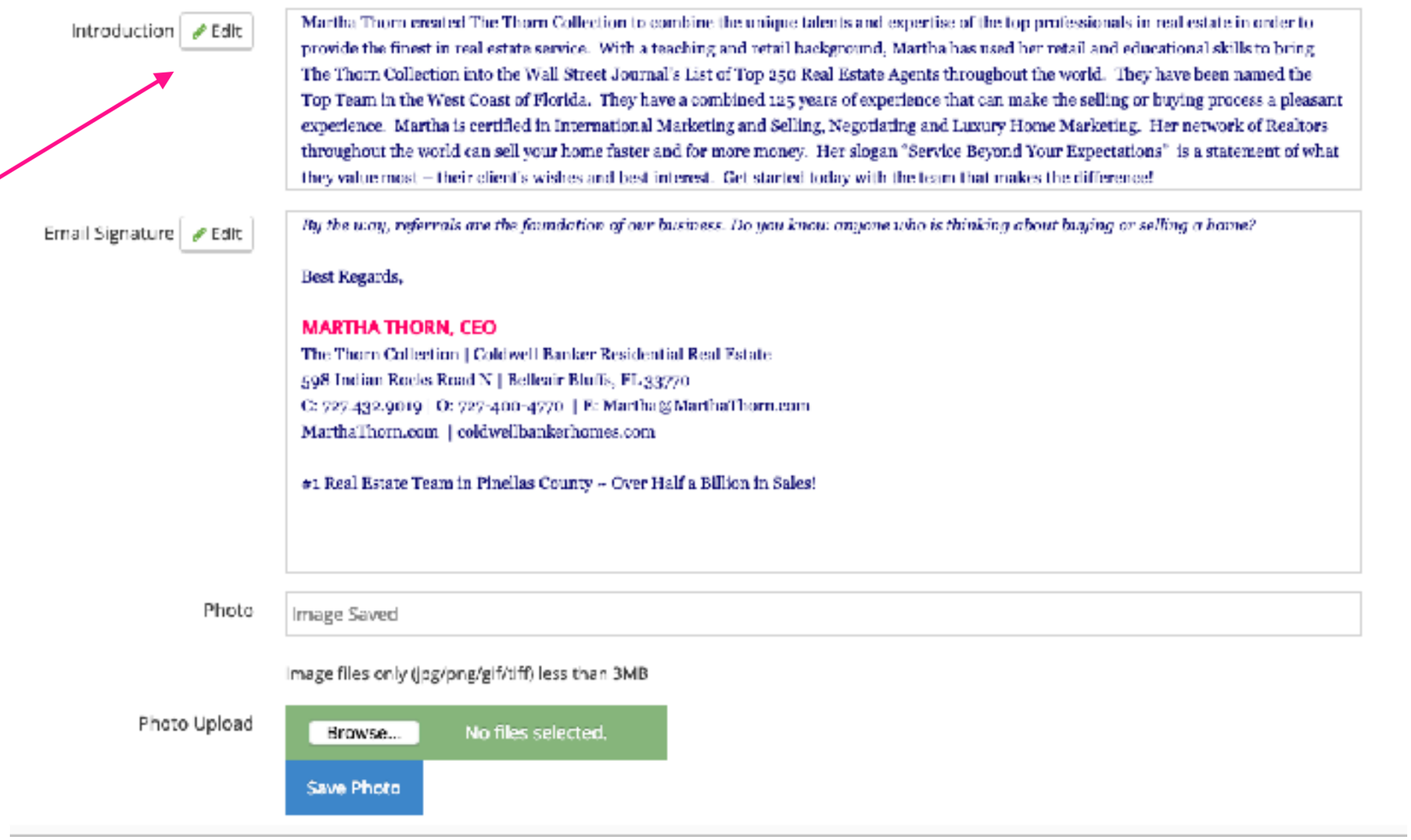
3.) Once the photo has saved, it will say "Image Saved" next to photo and you should see your picture on the top left hand side of the page.

3.) Your Introduction

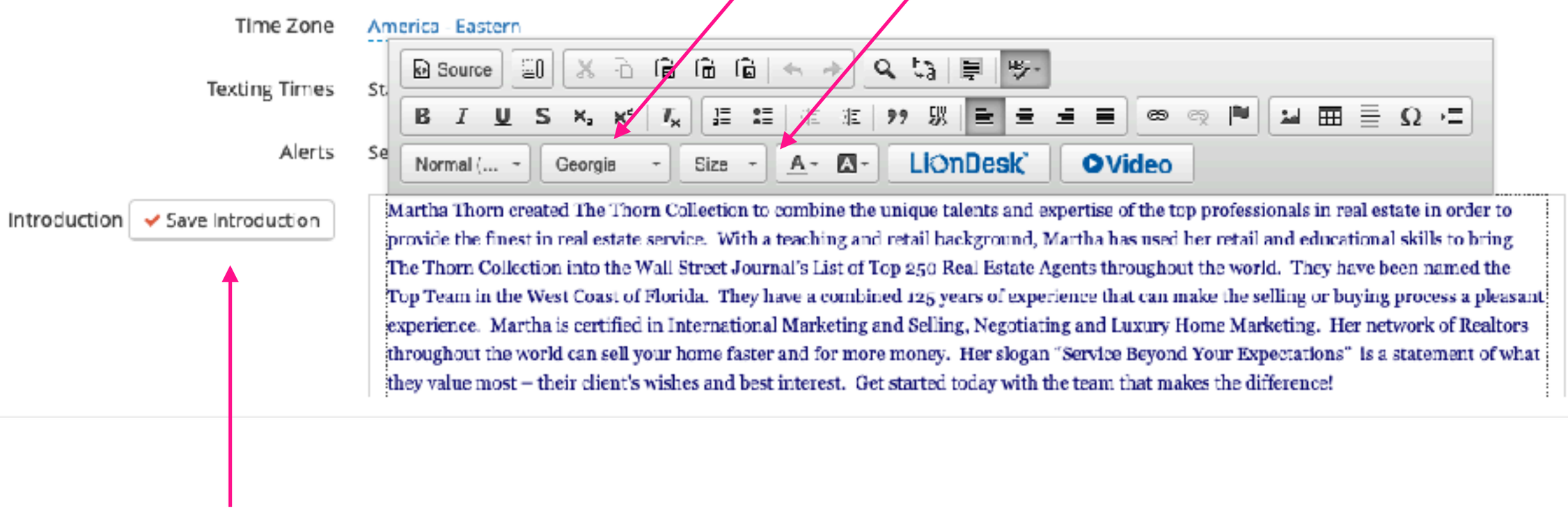
1.) Copy your biography from The Thorn Collection Website.

2.) Click Edit.

3.) Past your biography.



4.) Adjust your fonts. We recommend Georgia, size 12, and a deep blue color.



5.) Once you are finished editing your biography, click "Save Introduction".

All done!

4.) Your Email Signature

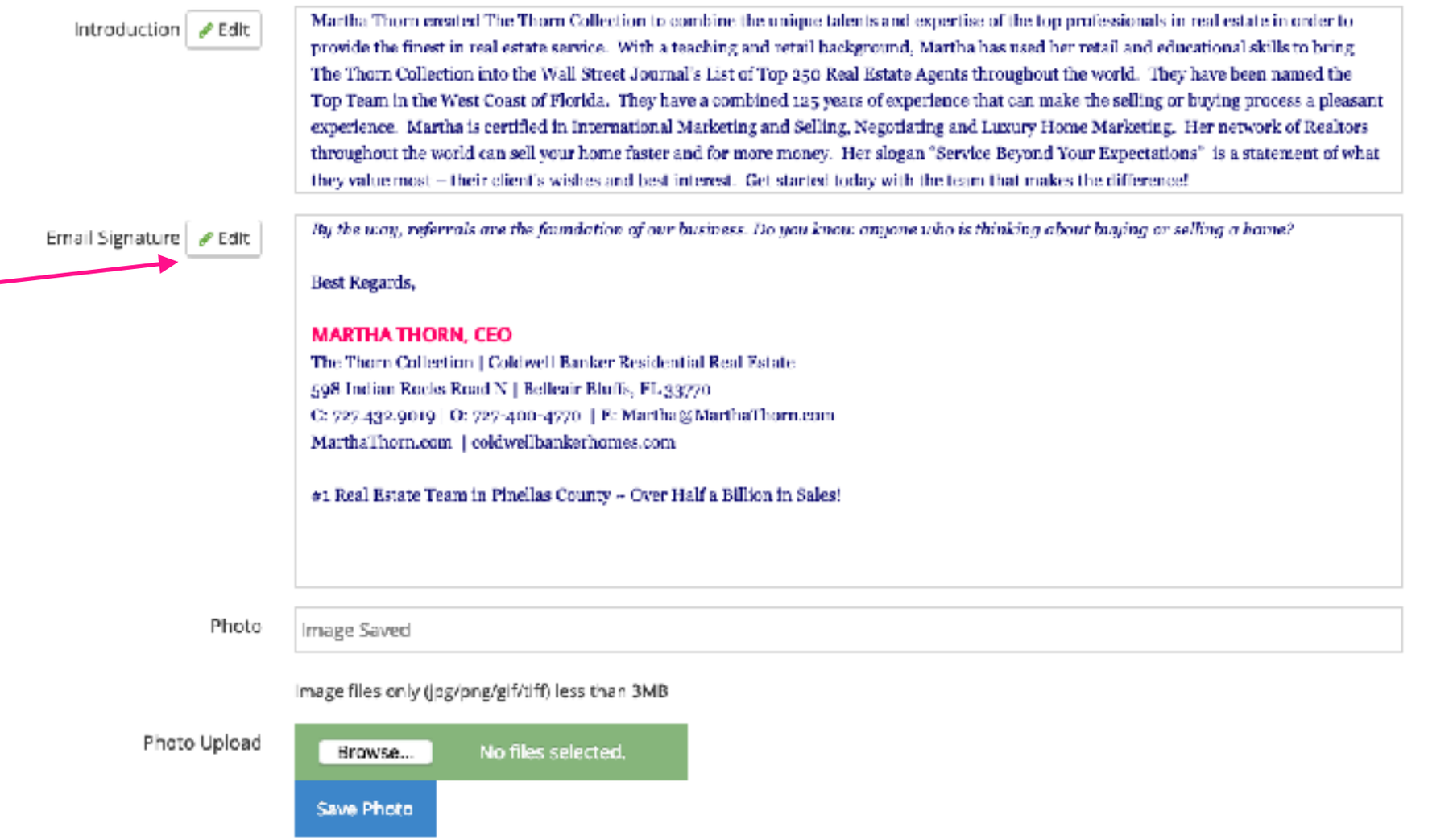
1.) Copy your email signature from gmail.

2.) Click Edit.

3.) Past your email signature.

4.) Adjust fonts if needed.

5.) Click save!



All done!

5.) Your Direct Mail Sender Address

Simply fill in the boxes using the information below and click "Save Sender Address".

Direct Mail:
Sender Address

Enter the 'From' address that will appear on all your direct mail pieces. Note: An incomplete address may not send.

The Thorn Collection, Coldwell Banker Residential Real Estate

598 Indian Rocks Rd. N

Street Address 2

Belleair Bluffs

FL

33770

United States

Save Sender Address

SECTION TWO:

Contacts Page
Contact Organization
Adding Contacts

Important Contact Notes

Martha is the **"Owner"** of **ALL** contacts.

Agents are the **"Assigned Users"** on all contacts.
That is our way of knowing which agent the
contact belongs to.

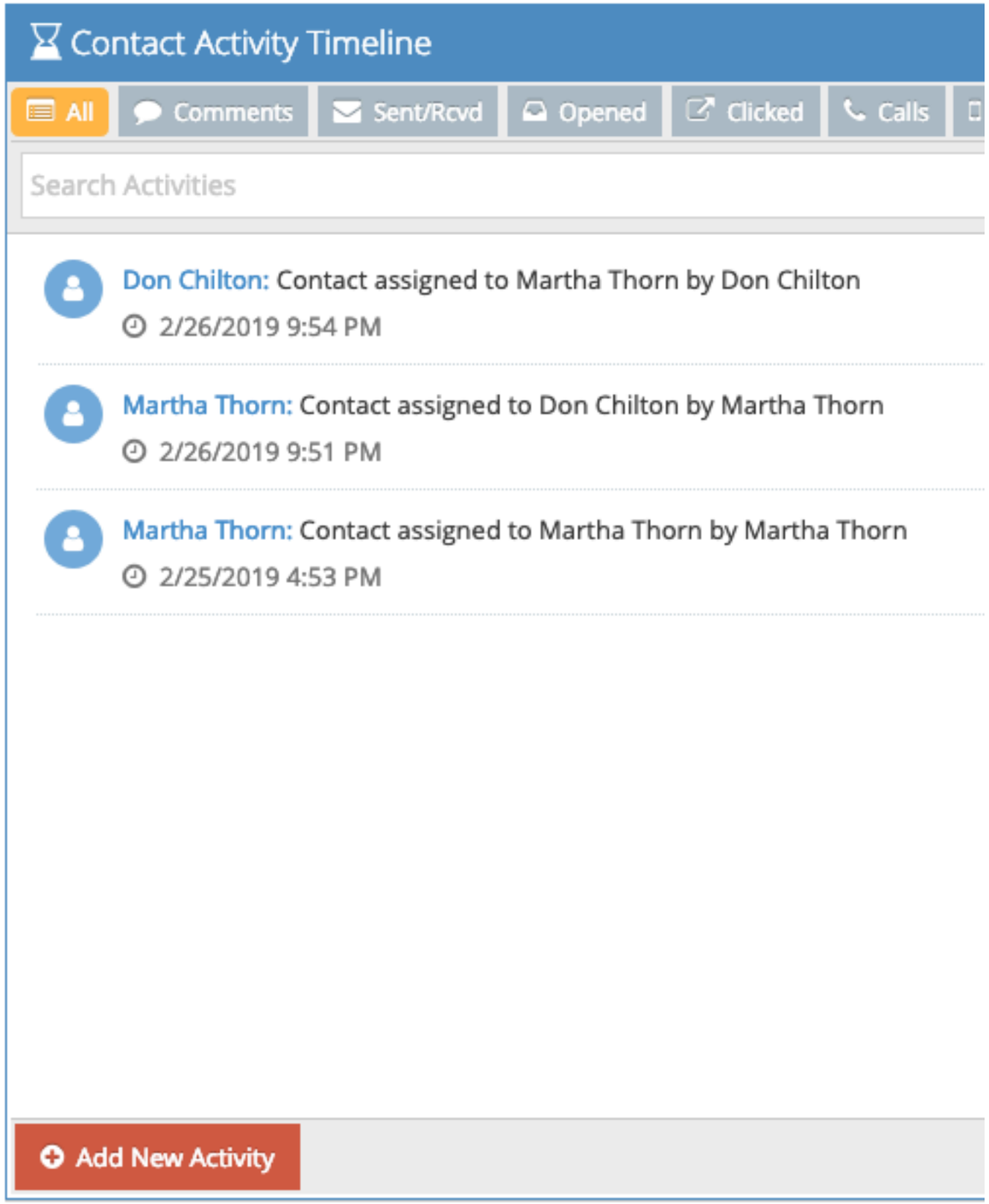
Martha is the only one who can delete a contact.
If you create a contact by mistake or find a contact
that you would like to have deleted you will need
to add the **"Delete"** tag to the contact.

Important Contact Notes

Martha's account is the only account that can export any of our contacts. If for any reason you need one of your lists exported, you will need to contact Ginger.

Most fields in all contacts are editable by all agents. Similarly to Top Producer we will want to be careful when reviewing each others contacts so that none of the information is accidentally changed. We will run back ups of the database regularly to ensure that if something is deleted, we can reclaim that information.

If an “Assigned User” is ever changed on a contact it will show in the “Contact Activity Timeline”.

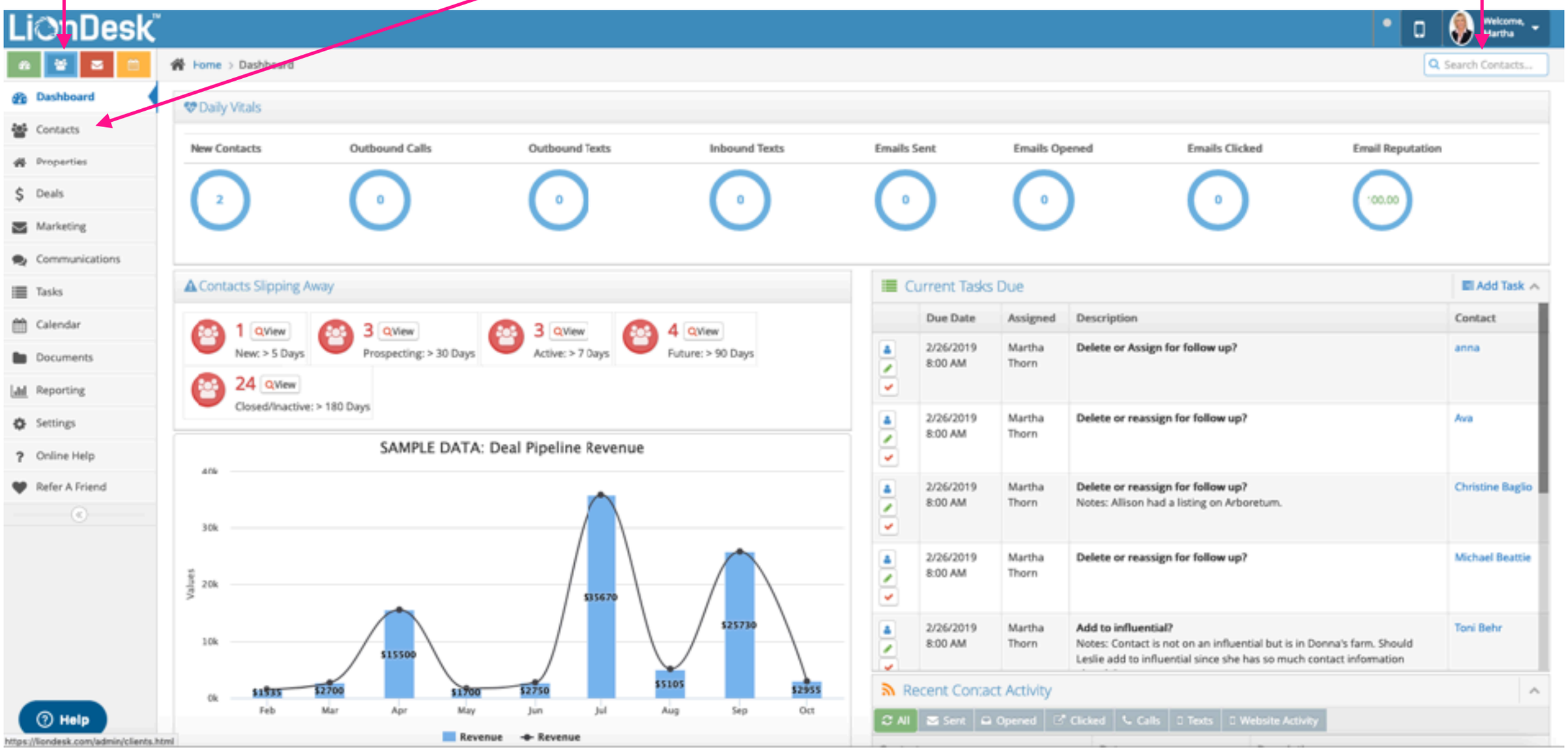


Below is your "Dashboard". The dashboard is your welcome screen every time you log into Lion Desk. There are 3 ways to access contacts from the dashboard.

1.) Click the blue icon at the top of the menu bar.

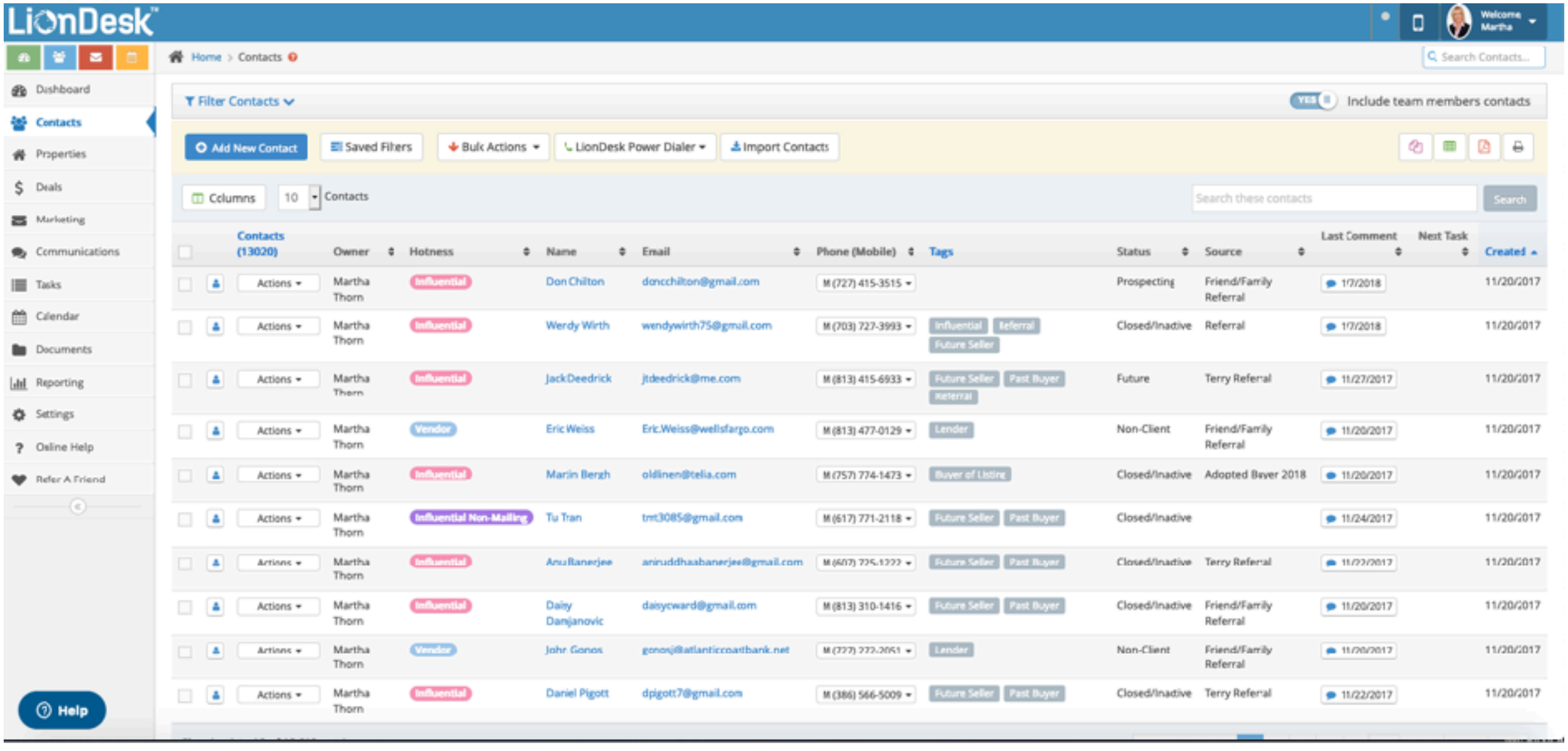
2.) Click the "Contacts" tab.

3.) Type a contacts name into the "Search Contacts" box.



Contacts Preview Page

This page will always display a grid resembling a spreadsheet that shows an assortment of contacts and their contact information.



How are we organizing contacts?

1

Hotness Levels

Rearrange the order by dragging individual items up or down

- Influential
- Influential Non-Mailing
- Farm
- Farm Non-Mailing
- Contact
- Lead
- Event Contact
- Adopted
- Vendor

2

Contact Types

Type
Active Buyer
Active Seller
Future Buyer
Future Seller
Past Buyer
Past Seller
Pre-Listing Appt.

3

Contact Tags

Use tags for your contacts to search and keep track

Tag Name
1st Buyer Apppointment Co
1st Buyer Apppointment Completed
2012 Buyer/Seller
2013 Buyer/Seller- import 5-1-17
2013 SELLER/BUYER
2014 Buyer/ Seller- import 5-1-17
2014 Buyer/Seller
2015 Buyer/Seller
2015 Buyer/Seller - import 5-1-17
2016 Buyer/Seller
2016 Buyer/Seller - import 5-1-17

1.) Hotness Levels

*Everyone should be familiar with most of these categories. You **MUST** select a hotness level when entering any contacts. Ginger will be using the hotness levels to determine who gets mail etc.*

Influential	Your Influential List that receives ALL communication.
Influential Non-Mailing	Your Influential List that only receives emails.
Farm	Your Farm Area that IS receiving farm mail outs.
Farm Non-Mailing	Contacts in your farm that are on someone else Influential List.
Contact	Contacts that are not in your farm or on your influential list.
Lead	Any contacts that are leads that have come into the team.
Event Contact	Contacts that were acquired at an Event we have hosted.
Adopted	Adopted clients from past sales.
Vendor	All Vendors such as painters, handymen, carpet, etc.

2.) Contact Types

Contact Types
Type
Active Buyer
Active Seller
Future Buyer
Future Seller
Past Buyer
Past Seller
Pre-Listing Appt.

These are pretty self explanatory. They will not apply to every contact but will apply to our MAIN contacts i.e. buyers and sellers.

The reason we are adding these to our MAIN contacts is so that it is easier to filter out other contacts when searching or pulling lists for targeted mailing or drip campaigns.

The Pre-Listing Type will also help Cheri keep track of listing appointments that did not result in listings. If you go on a listing appointment, this contact type should be applied. If you get the listing, the type should be switched to "Active Seller". If you do not get the listing, you do not change the contact type.

3.) Contact Tags

Another feature to help us sort and filter our contacts.

We are still working on finalizing the list of contact tags that we will be using.

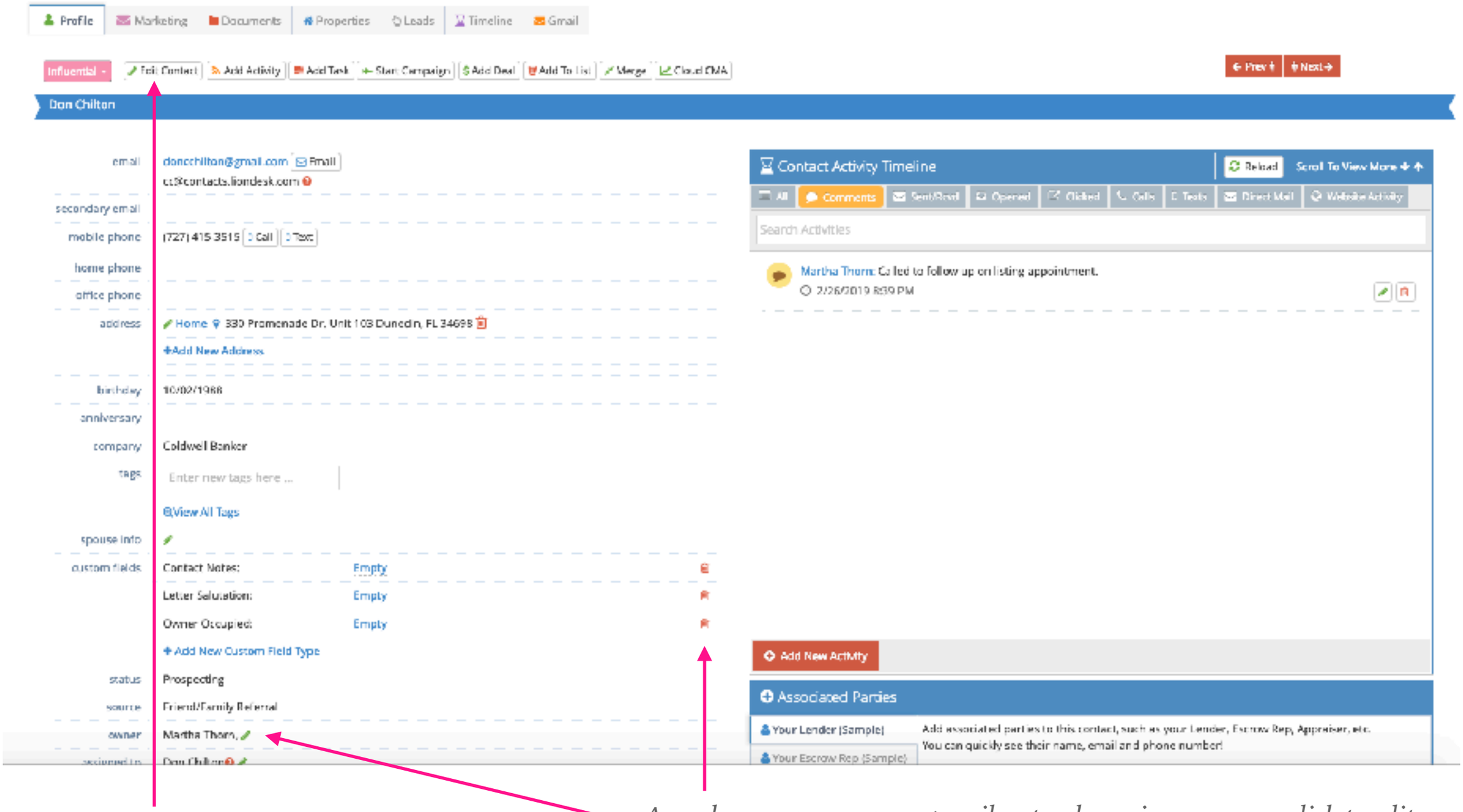
When we imported everyone's contacts from Top Producer, if a contact was on a "List" that list was turned into a "Tag" in Lion Desk. So if you wanted to see who you had on the "Gingerbread House 2018" list, you would look for that tag.

We will also be using tags to differentiate our "Vendors". If you input a vedor, you will want to select the tag that applies to what that vendor does. So if it is a painter, the painters hotness level would be VENDOR and his tag would be PAINTER.

Inside A Contact

Left hand side shows contact details such as phone numbers, email addresses, property addresses, spouse information, etc.

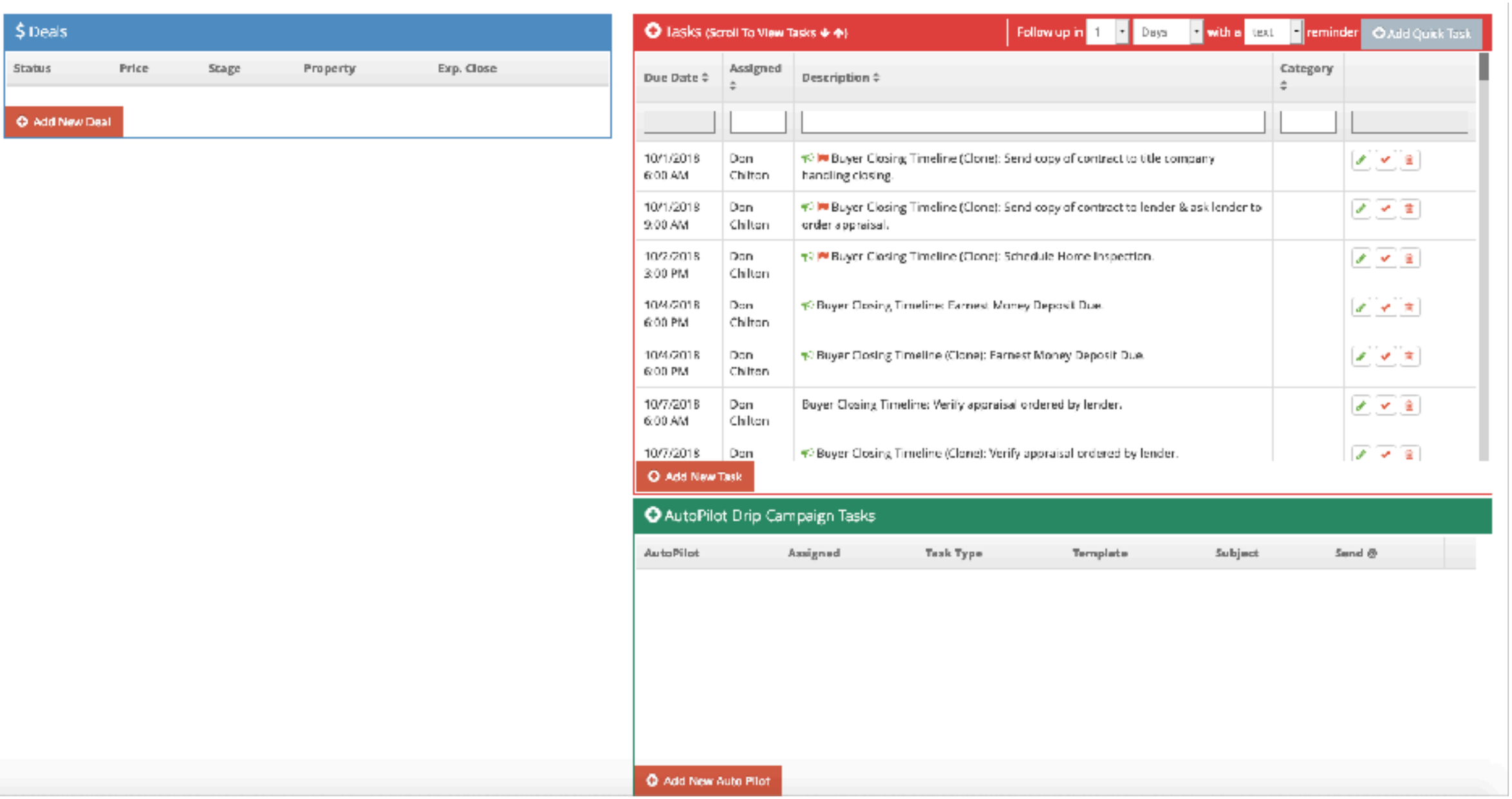
Right hand side shows all contact activities such as comments, emails sent and received, tasks due, etc.



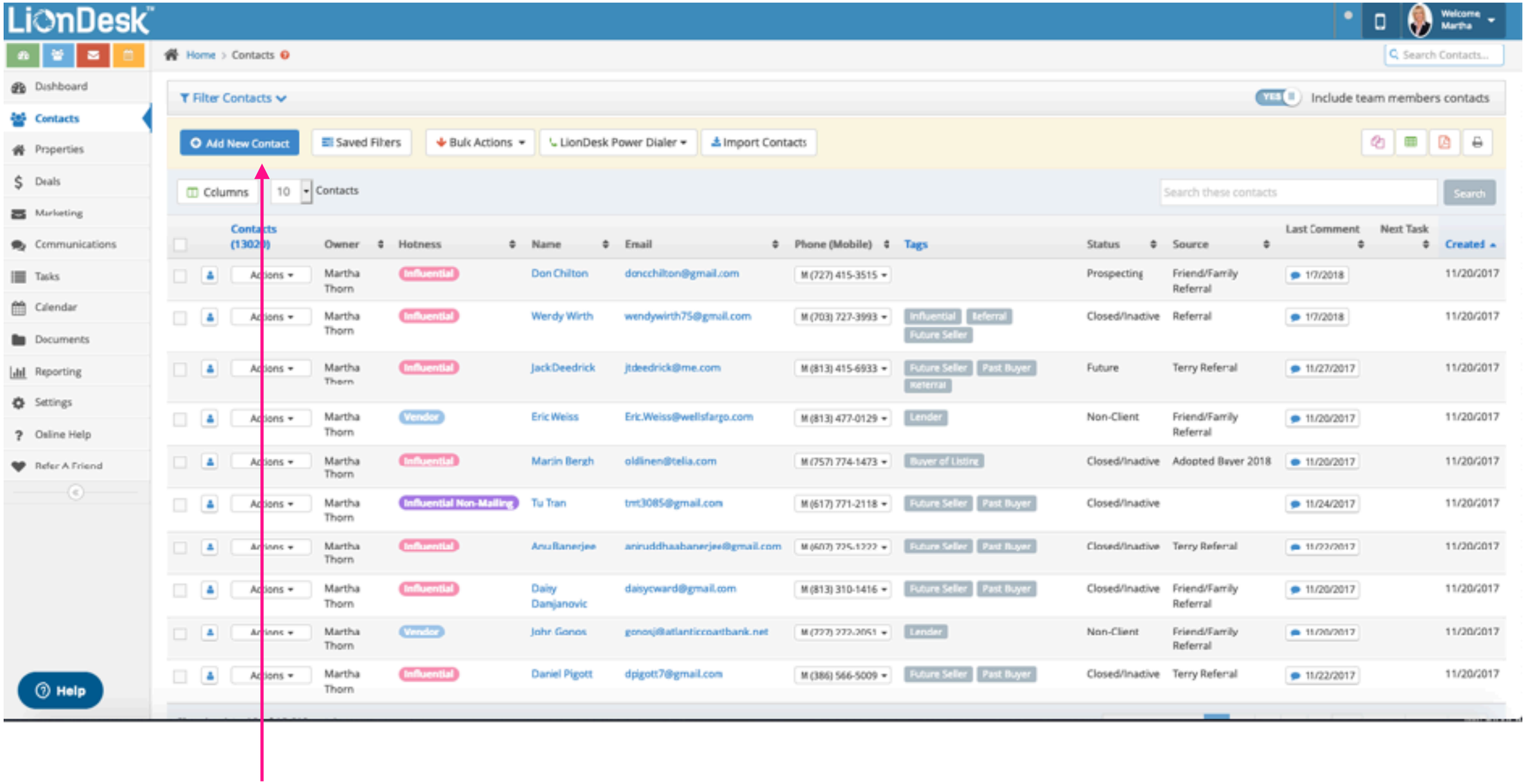
Quick editing options are available at the top.

Anywhere you see a green pencil or trash can icon, you can click to edit or delete information.

Any tasks you enter for a contact will appear further down the page.



Adding New Contacts

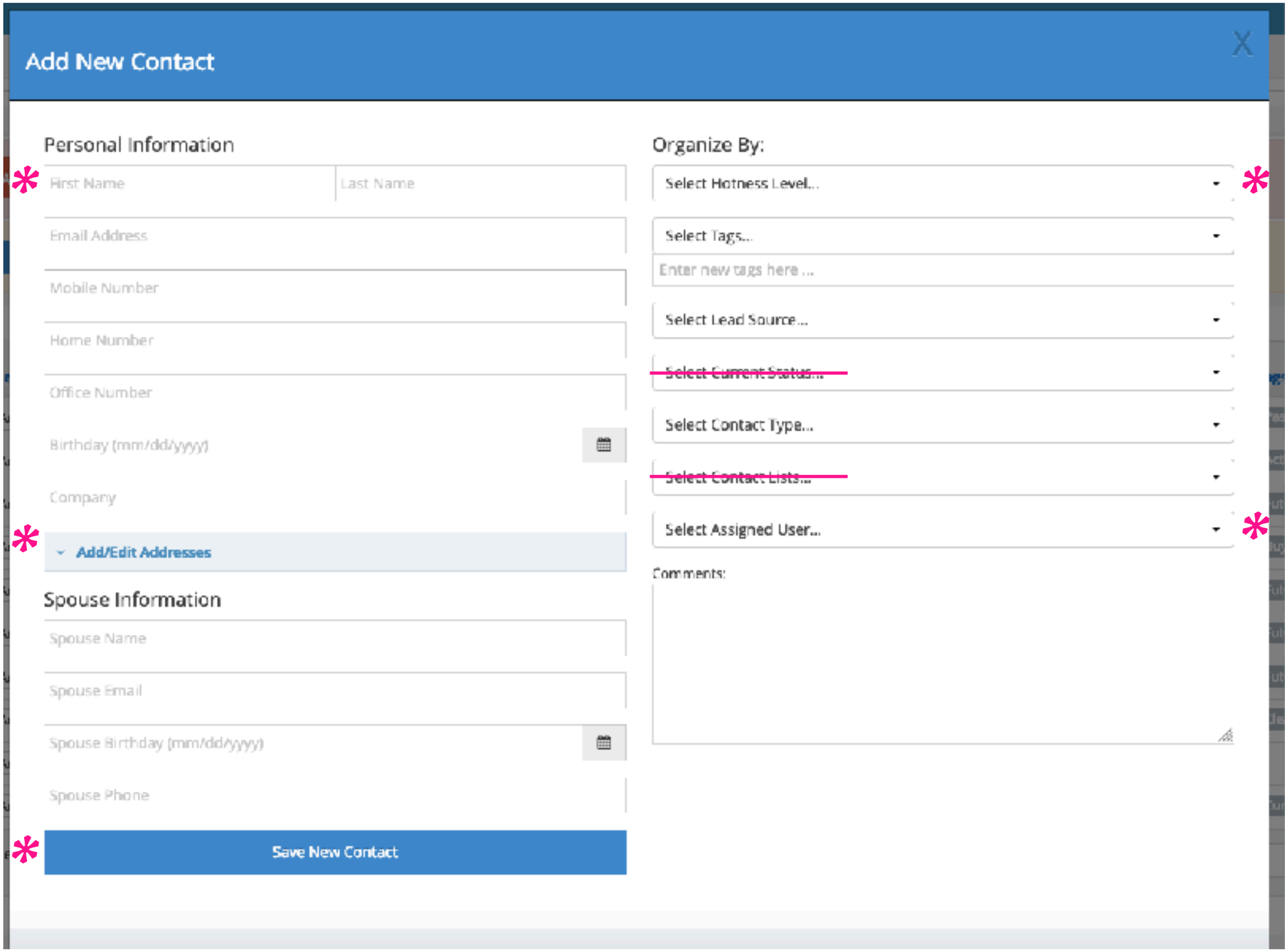


1.) On the contacts preview page "+Add New Contact" appears above "Columns". Click "+Add New Contact" to add a contact.

2.) *The following box will appear.*

3.) *Click in the individual contact fields to add contact information.*

4.) *Make sure to select a "Hotness Level" and "Assigned User" at a minimum.*



Adding New Contact Rules

New Leads (phone calls/walk-ins)

- Go in as Last Name = Buyer, First Name = Street Name
- Hotness Level will be “Lead”
- Assign to Agent - whoever lead will belong to

Spouse Rule

If different last names

- First Name Field = Husband first name and last name
- Last Name Field = and Wife first name and last name

If same last name

- First Name Field = Both Husband and Wife first names
  example: John and Jane or John & Jane
- Last Name Field = Last name

Pre-Listing Contact

Entering The Contact

- Follow Spouse Rule
- Hotness Level: Lead if not already selected.
- Contact Type: Pre-Listing
- Assign To Agent

After The Appointment

- Add notes under “comments” such as when cookies were ordered and what message was used.
- If Listing Agreement was signed, change hotness level to “Influential” and contact type to “Active Seller”.

Agents Adding New Contacts

Entering The Contact

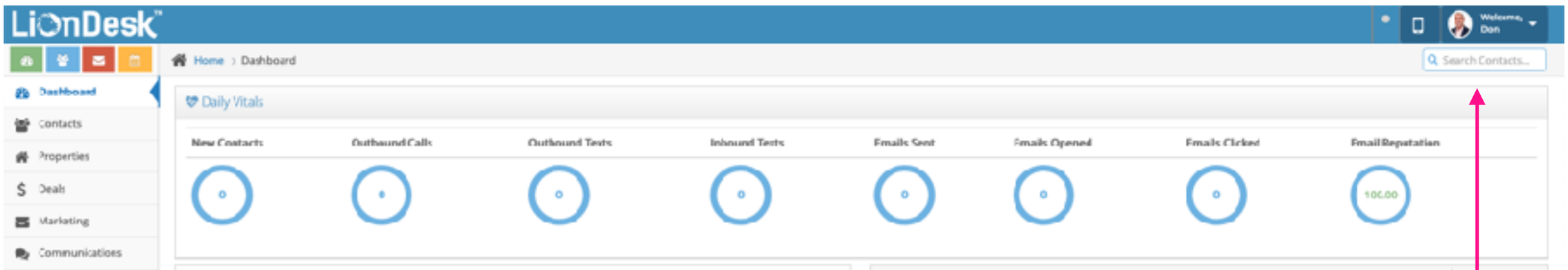
- Search the database for the contact to make sure that you are not entering a duplicate.
- Follow Spouse Rule
- Hotness Level: You must assign a hotness level.
- Contact Type: Can be left blank if they do not fall under the contact type categories.
- Add any necessary tags.
- Assign to yourself or the agent that you are entering the contact for.

If you have a property address for the contact, search that address to see if it is on someones farm. If the contact is on someones form, submit the Thorn Portal "New Contact Lead" form and select that agent. They will then have 24 hours to respond.

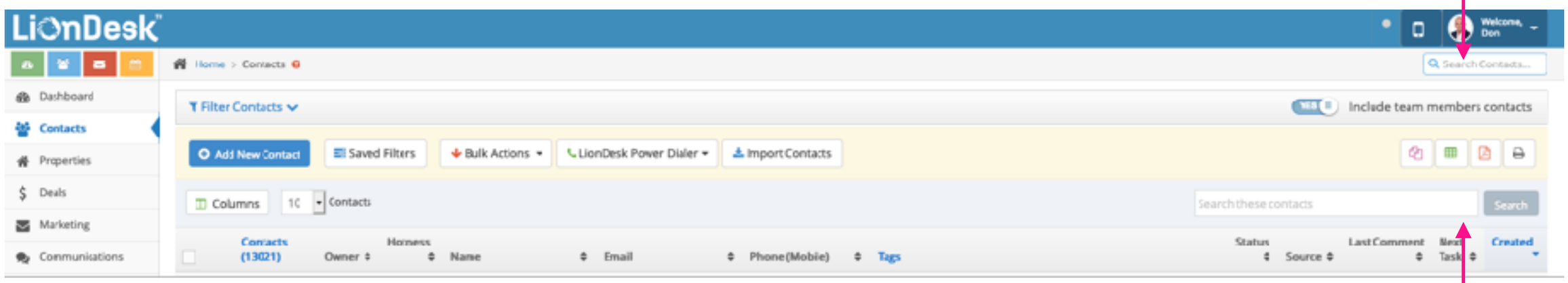
SECTION THREE:

Searching Contacts
Quick Edits

Quick Searches



1.) At the top right corner of every page, under your picture there is a contact search bar.



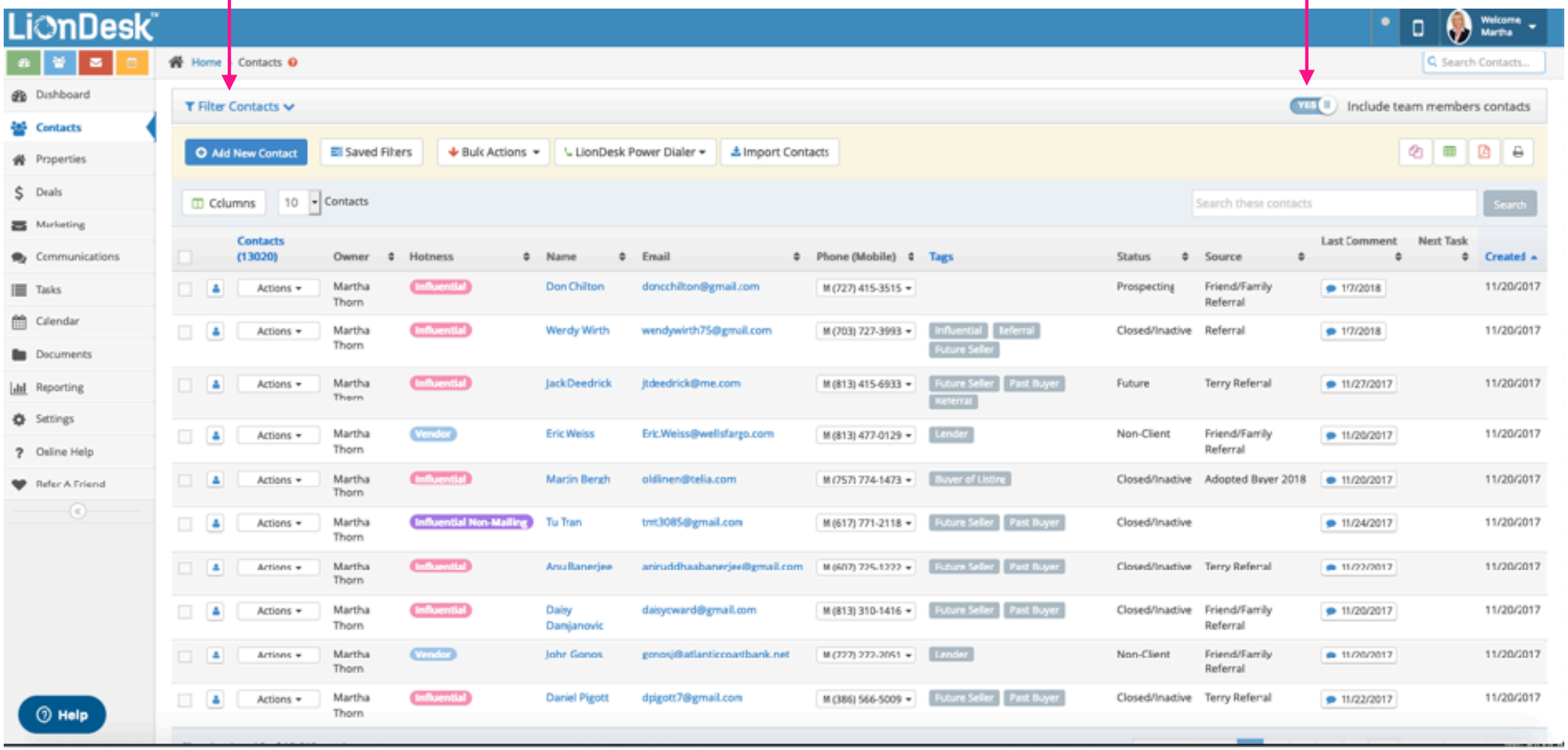
2.) On the contact previews page there is a search bar above the displayed contacts.

Contacts Preview Page

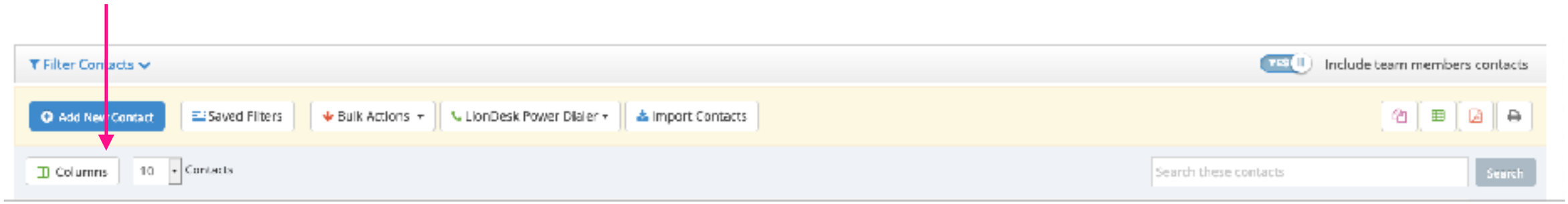
You have the option to have certain contact information displayed. Our organizational structure helps us to quickly sort and locate different contacts.

1.) To search for specific contacts, you can select "Filter Contacts" where a drop down will appear that gives you various search options.

2.) You have the option to include other agent's contacts or only see your own.



Adjusting Your View

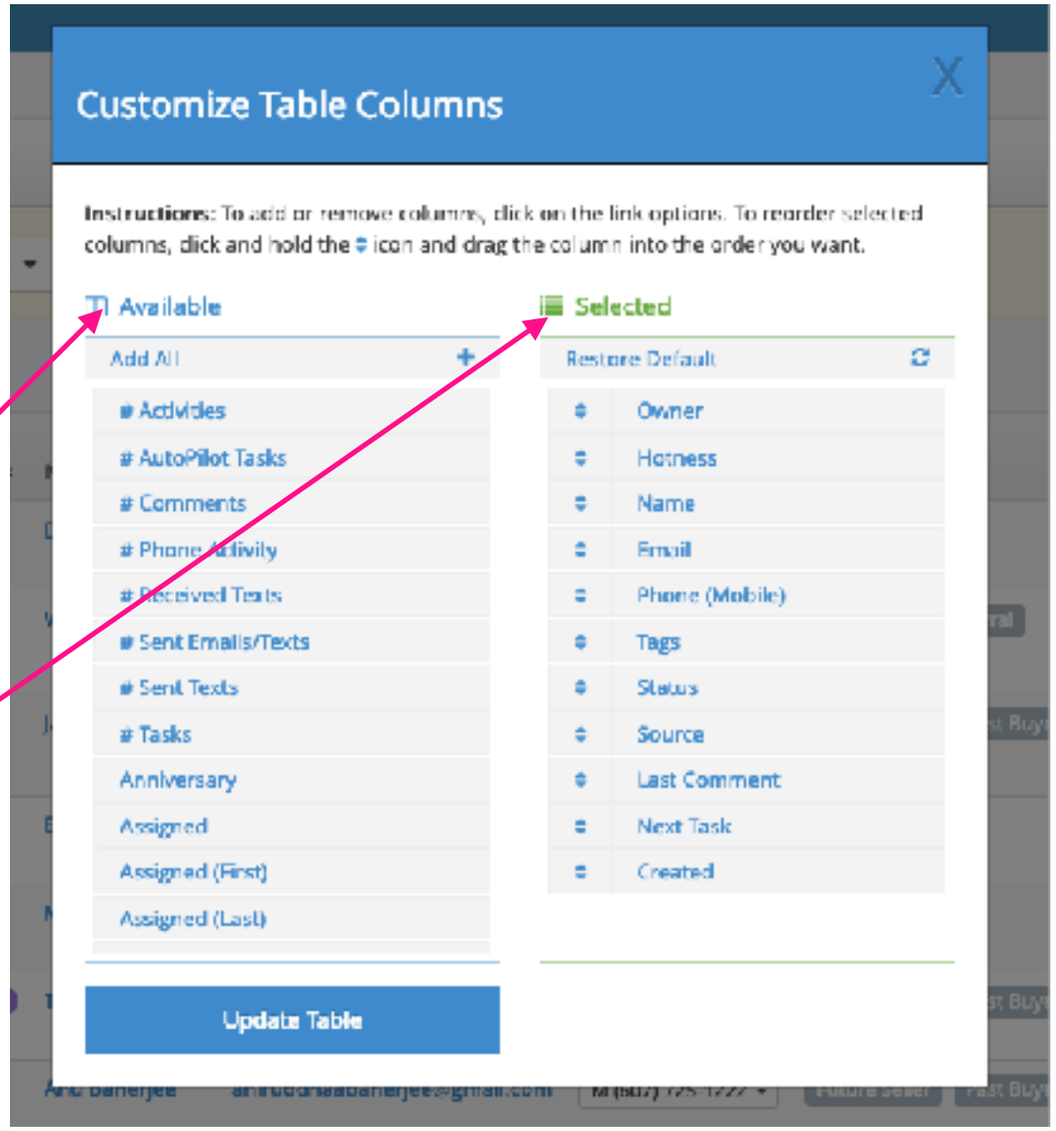


1.) When you click "Columns", you then have the option to select the different columns that you can see. Everyone will be different, there is no right or wrong way to view your contacts.

2.) "Available" shows you the columns that you can pick to be viewed.

3.) "Selected" shows you the columns that are already visible.

4.) To add columns, put your mouse on the column title in "available" and click the green plus sign.



5.) To remove columns, put your mouse on the column title in "selected" and click the red x sign.

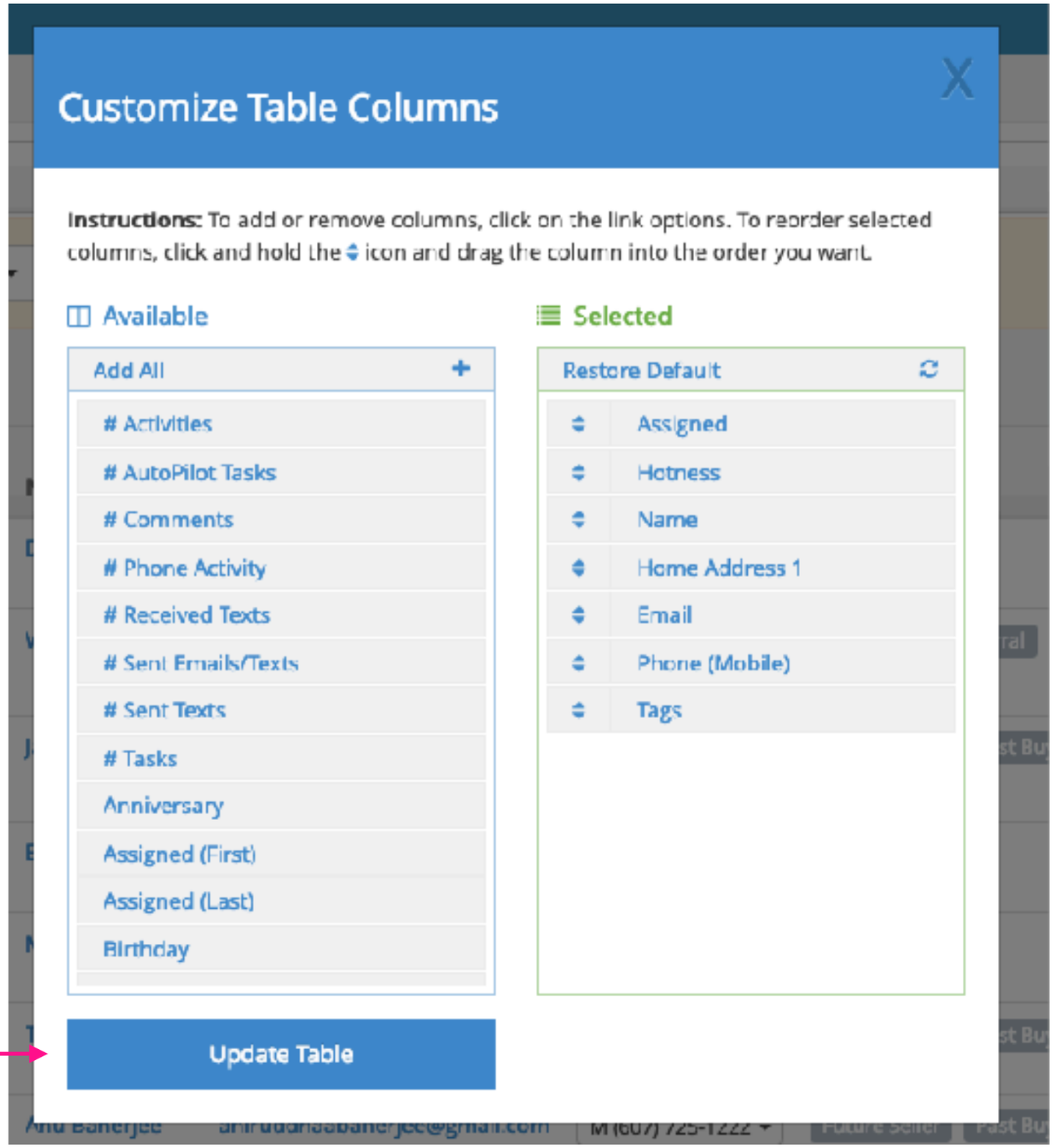
6.) To arrange columns, put your mouse on the up and down arrow, click, hold, and drag the column title into the order you would like to see it appear.

Recommended Columns + Order

-Assisgned
-Hotness
-Name
-Home Address 1
-Email
-Mobile Phone
-Tags

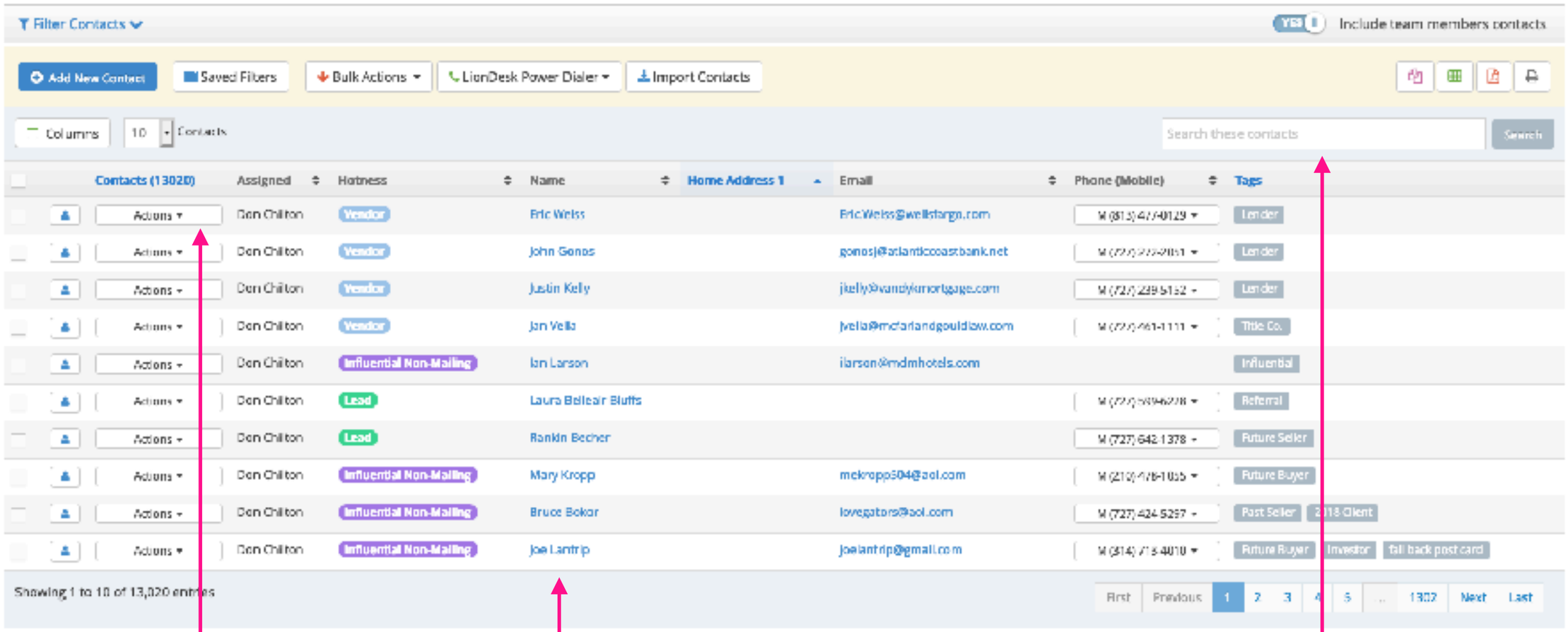
The above view is the "Default" view that you will see when initially logging in.

This shows the recommended order and columns.



8.) Once you've selected the columns that you like, click "Update Table".

Your contacts page will now appear only showing the columns that you would like to see.



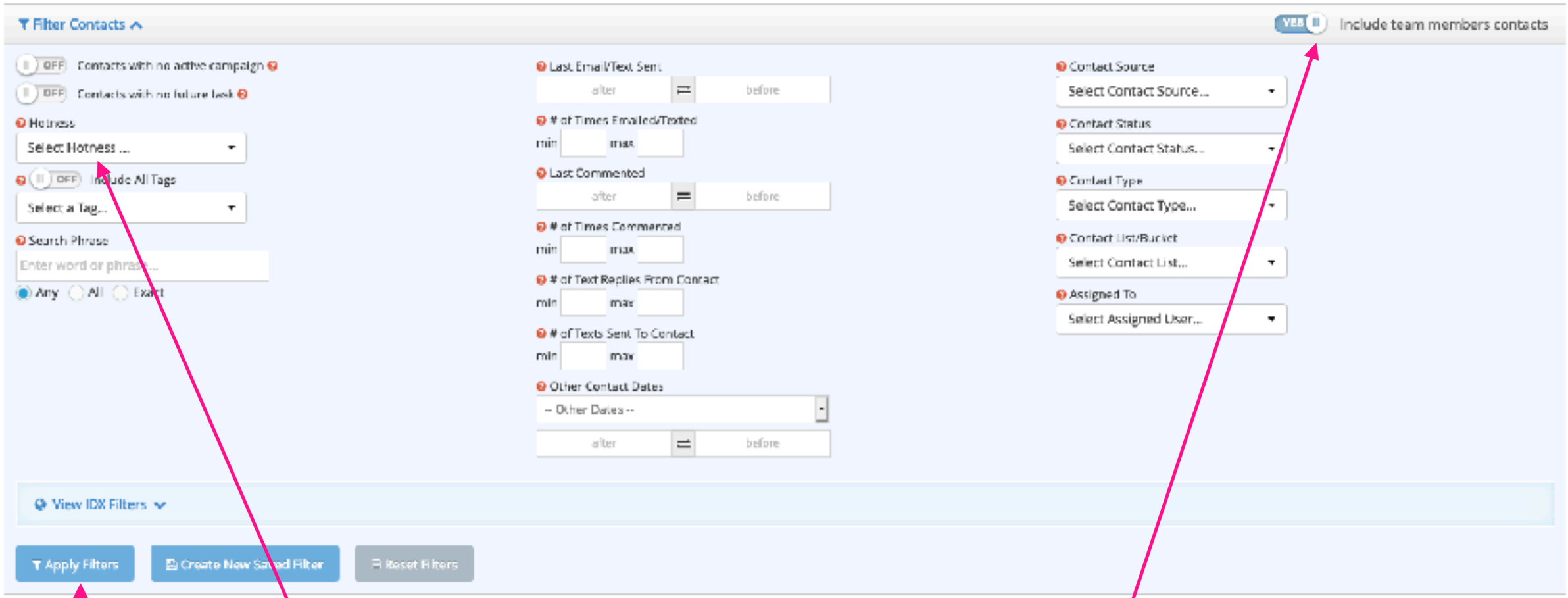
To quickly access a contact to make changes, click "Actions" next to the contact.

To open a contact, click on the contact name.

To do a quick search for an individual contact, you can type a name into the "Search these contacts" box.

Filtering Contacts

You will use "Filters" if you want to search a large list of contacts. For instance, if you wanted to see your entire farm or influential list. Also, if you wanted to search the entire Influential database to see if a contact is on someone else's Influential List.



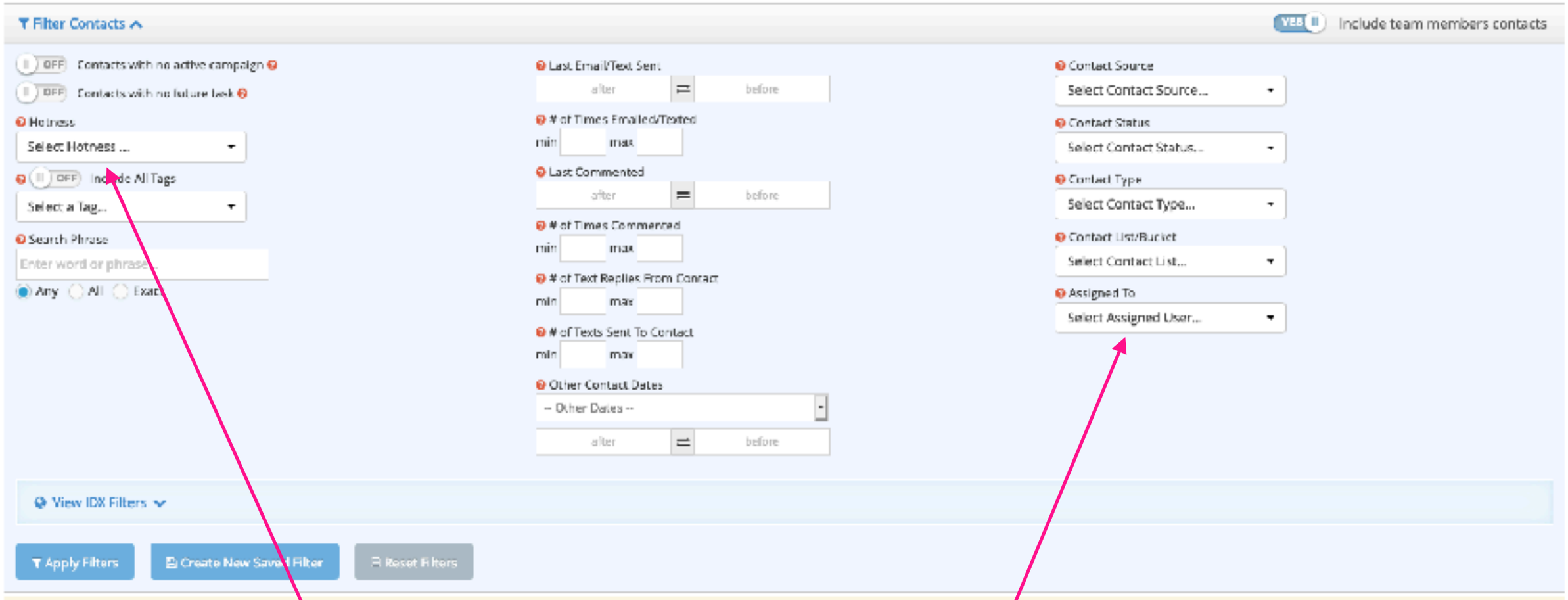
To check the Influential List:

-Make sure "Include team members contacts" says "Yes"

-Select "Hotness" Influential and Influential Non-Mailing

-Click "Apply Filters"

Filtering Contacts



To check just your Influential List:

-Select "Assigned User" and your name.

-Select "Hotness" Influential and Influential Non-Mailing

To check your Farm Lists:

-Select "Assigned User" and your name.

-Select "Hotness" Farm and Farm Non-Mailing

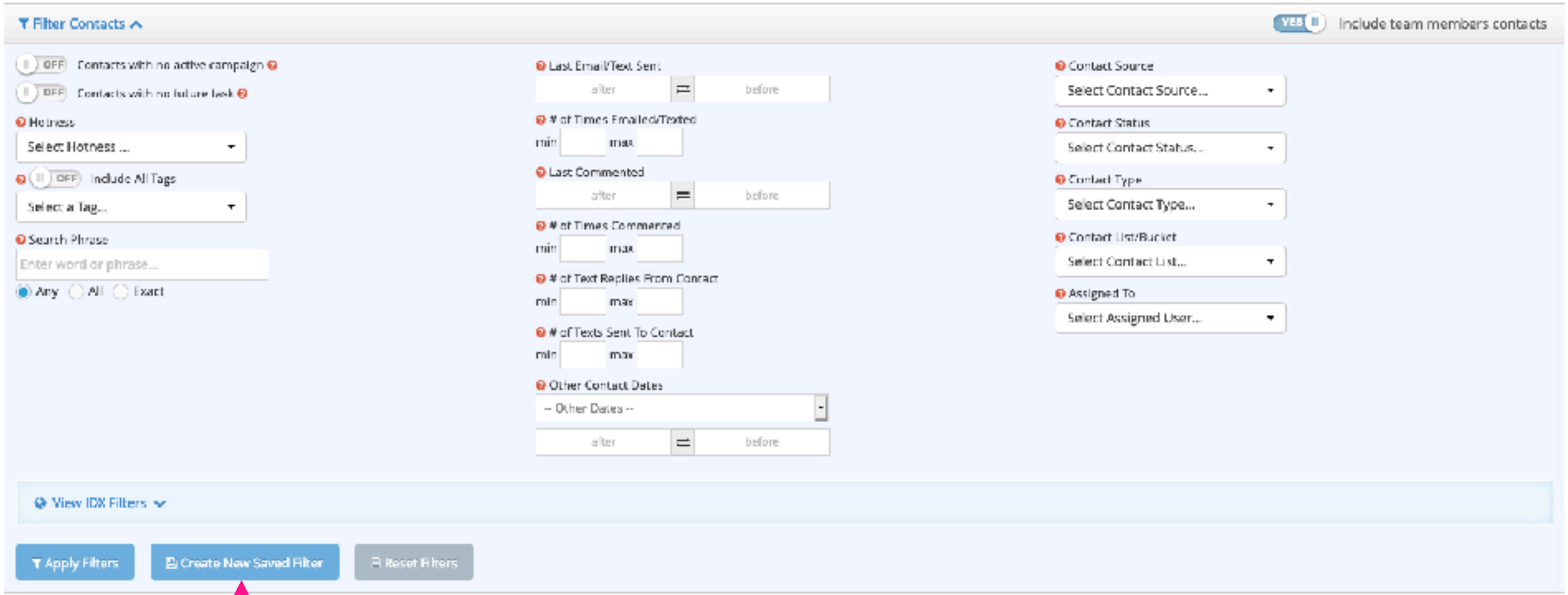
To check your Contacts:

-Select "Assigned User" and your name.

-Select "Hotness" Contact

Saved Filters

Creating "Saved Filters" will save you time in searching for a specific group of contacts.



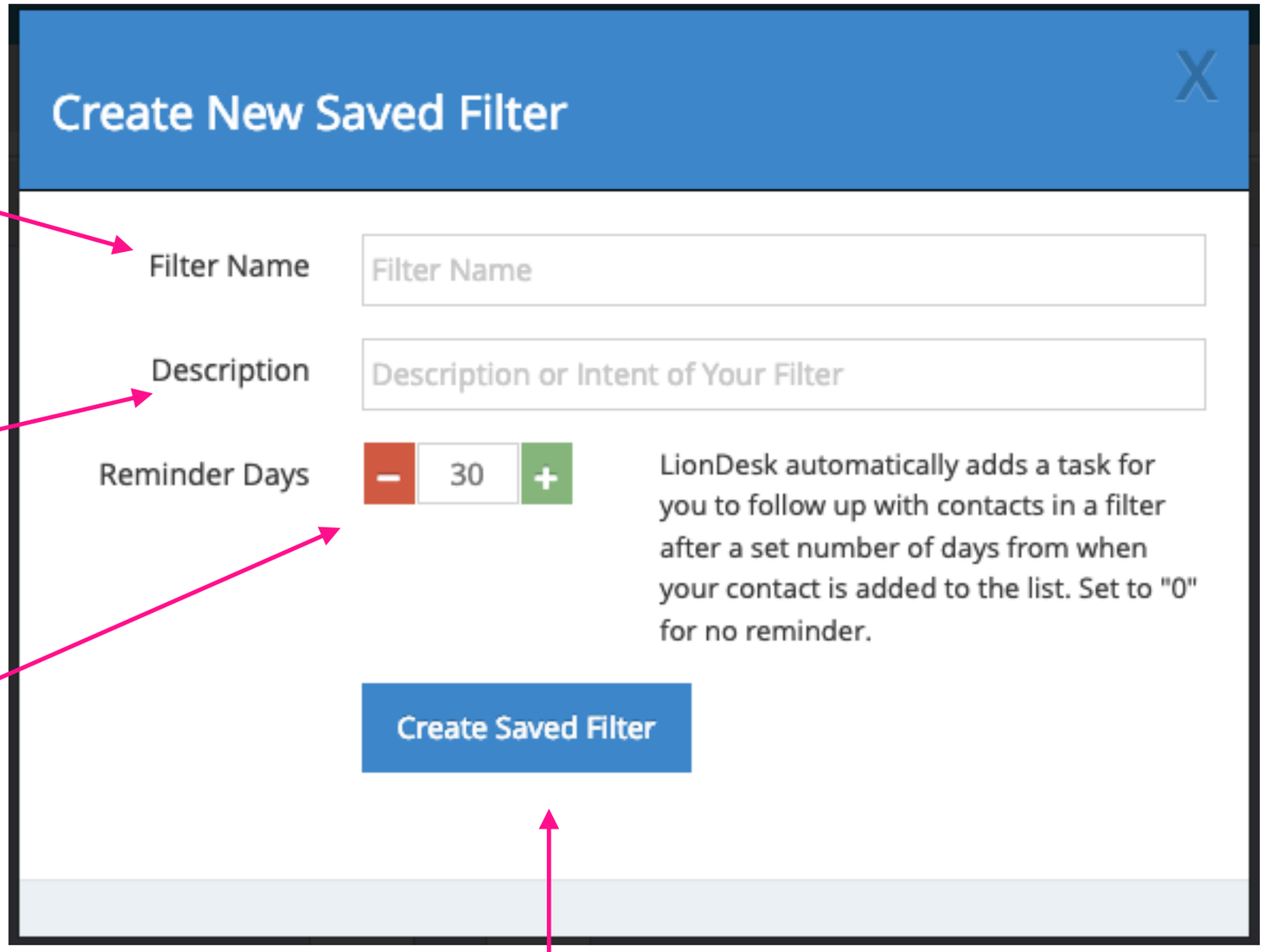
After you've input your filter options, you can saved filter by clicking on "Create New Saved Filter".

Saved Filters

This screen will appear. You will want to name your filter. For example if it's your influential list you would put "First Name Influential List".

Enter a brief description of your list. Example: Includes my influential and influential non-mailing.

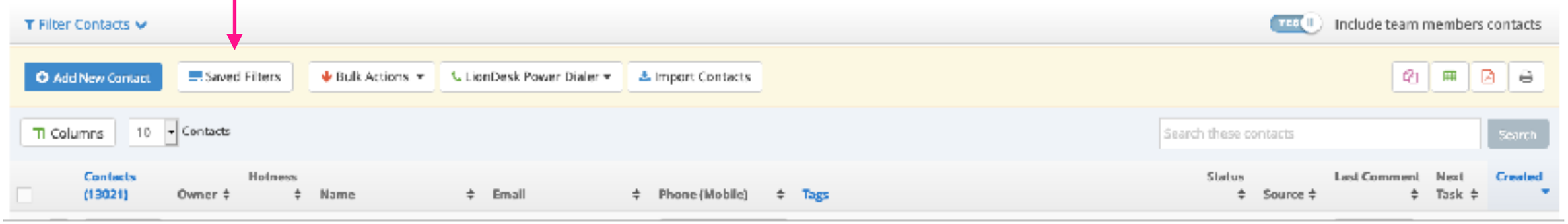
For reminder days, put "0". We will be using a different set of reminder functions.

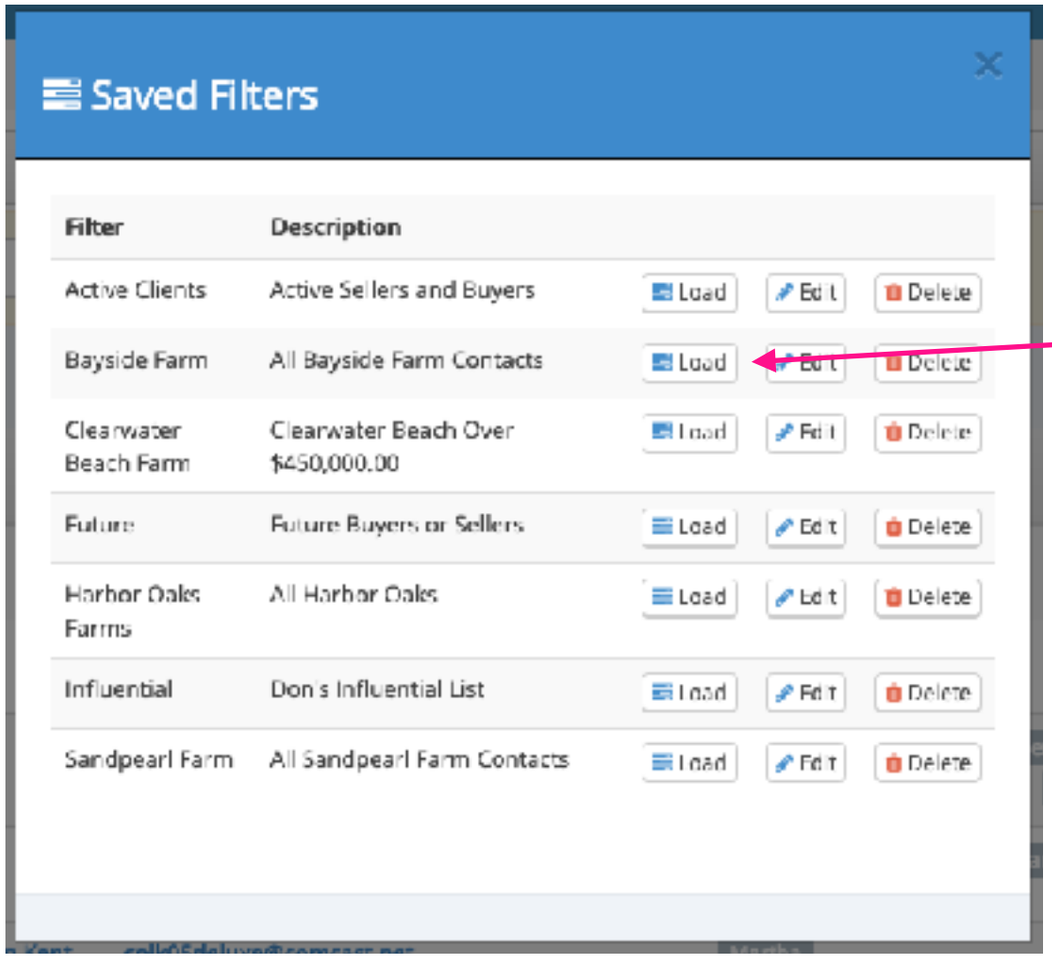


Click "Create Saved Filter"

Saved Filters

Now when you visit the "Contacts Preview Page" you can click on "Saved Filters".





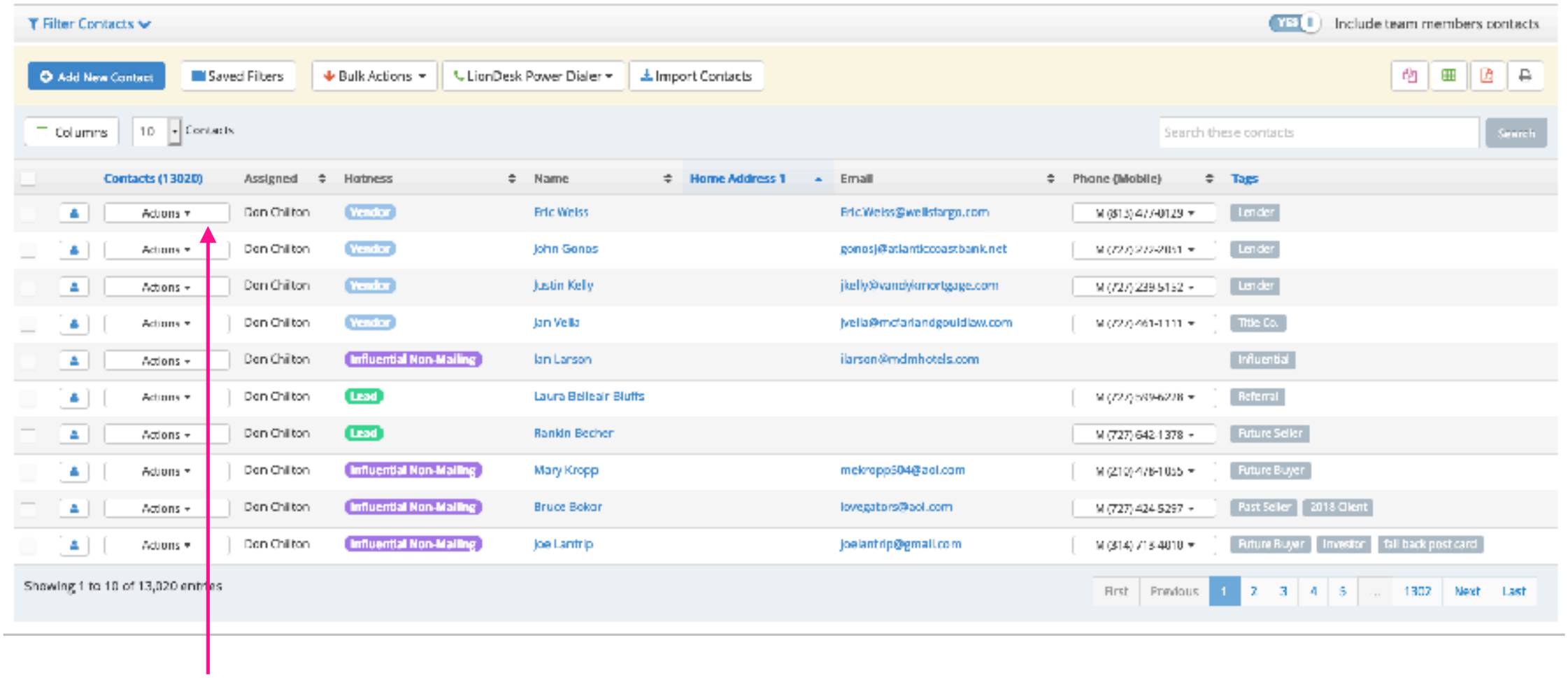
Your saved filters will appear!

Click "Load" next to the filter that you would like to see

All of the contacts that fit within those filter parameters will appear!

Quick Contact Updating

Lion Desk allows you to edit contacts without leaving your "Contacts Preview Page". There are two ways to start this process.



To quickly access a contact to make changes, click "Actions" next to the contact.

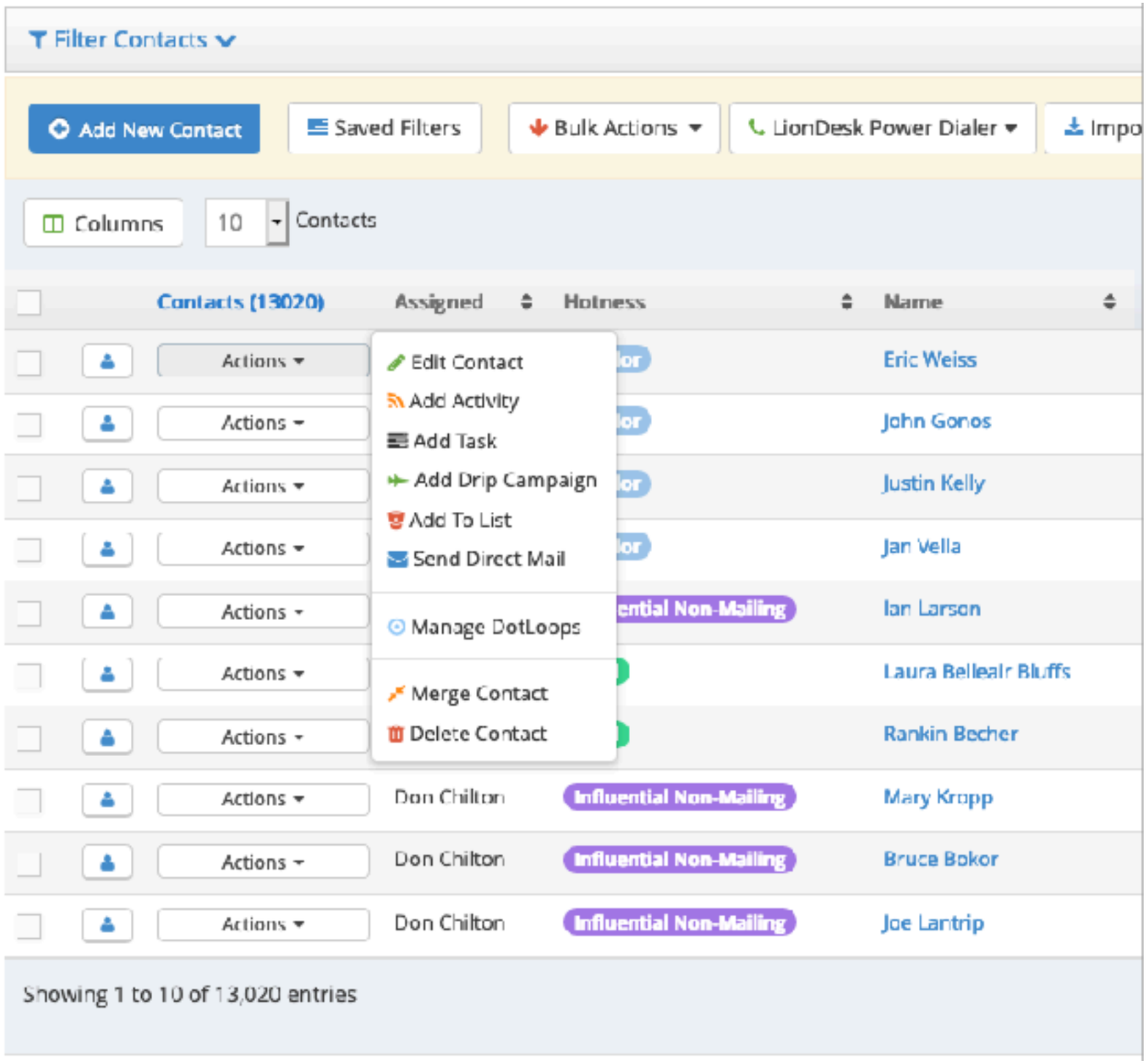
Actions

1.) Edit Contact: Will open a small window that allows you to edit basic contact information.

2.) Add Activity: Allows you to quickly add a "Comment" or another type of activity such as a phone call or email sent.

3.) Add Task: Allows you to add reminders for the contact such as wanting to be reminded to make a follow up call.

In a later training we will cover:
"Add Drip Campaign"
"Add To List"
"Send Direct Mail".



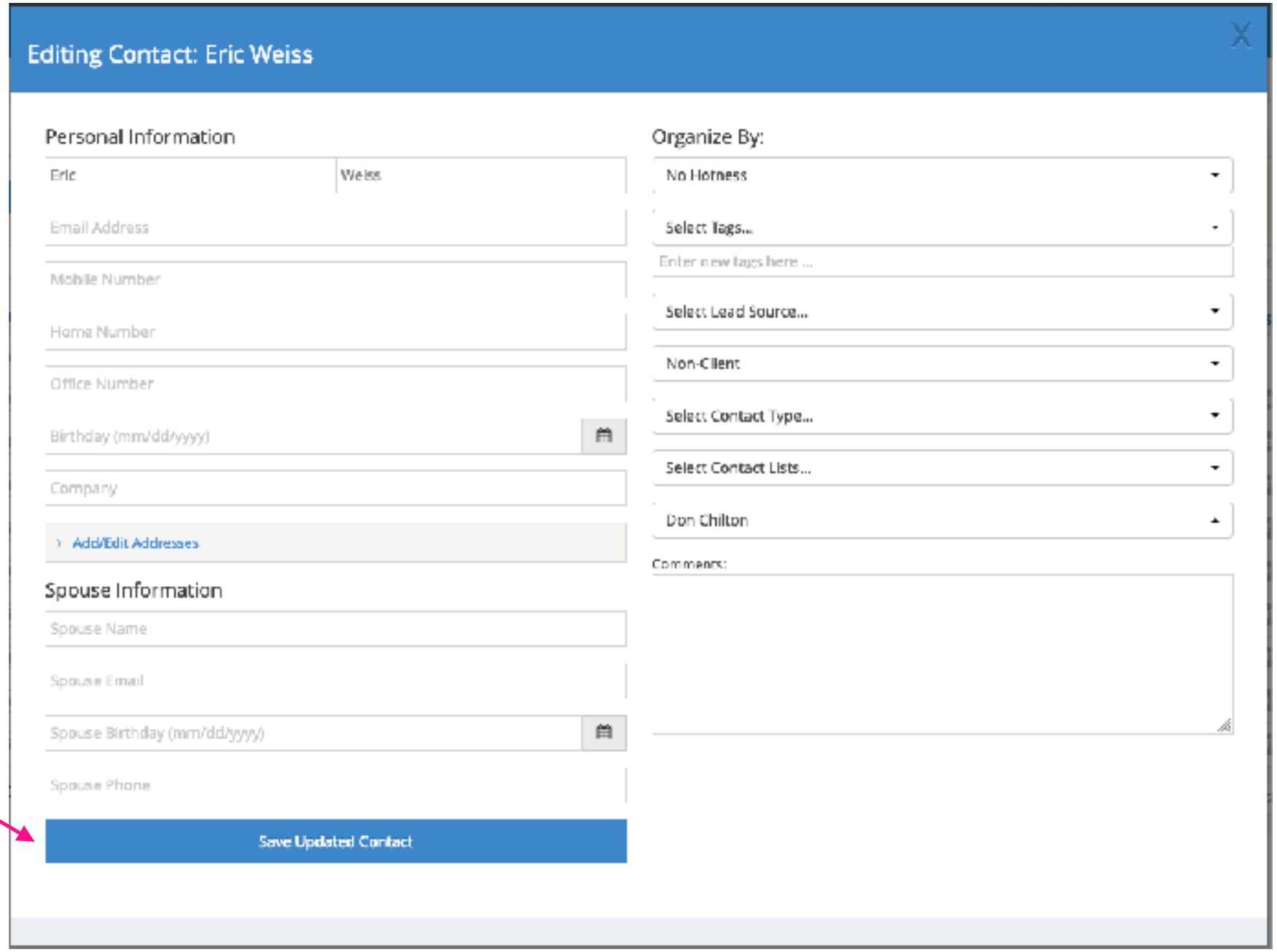
Edit Contact

1.) Edit Contact: Will open this window that allows you to edit basic contact information.

2.) Personal information will appear on the left hand side.

3.) The ways in which we organize our contacts will appear on the right hand side.

4.) Once you are done inputting updated information, click "Save Updated Contact".



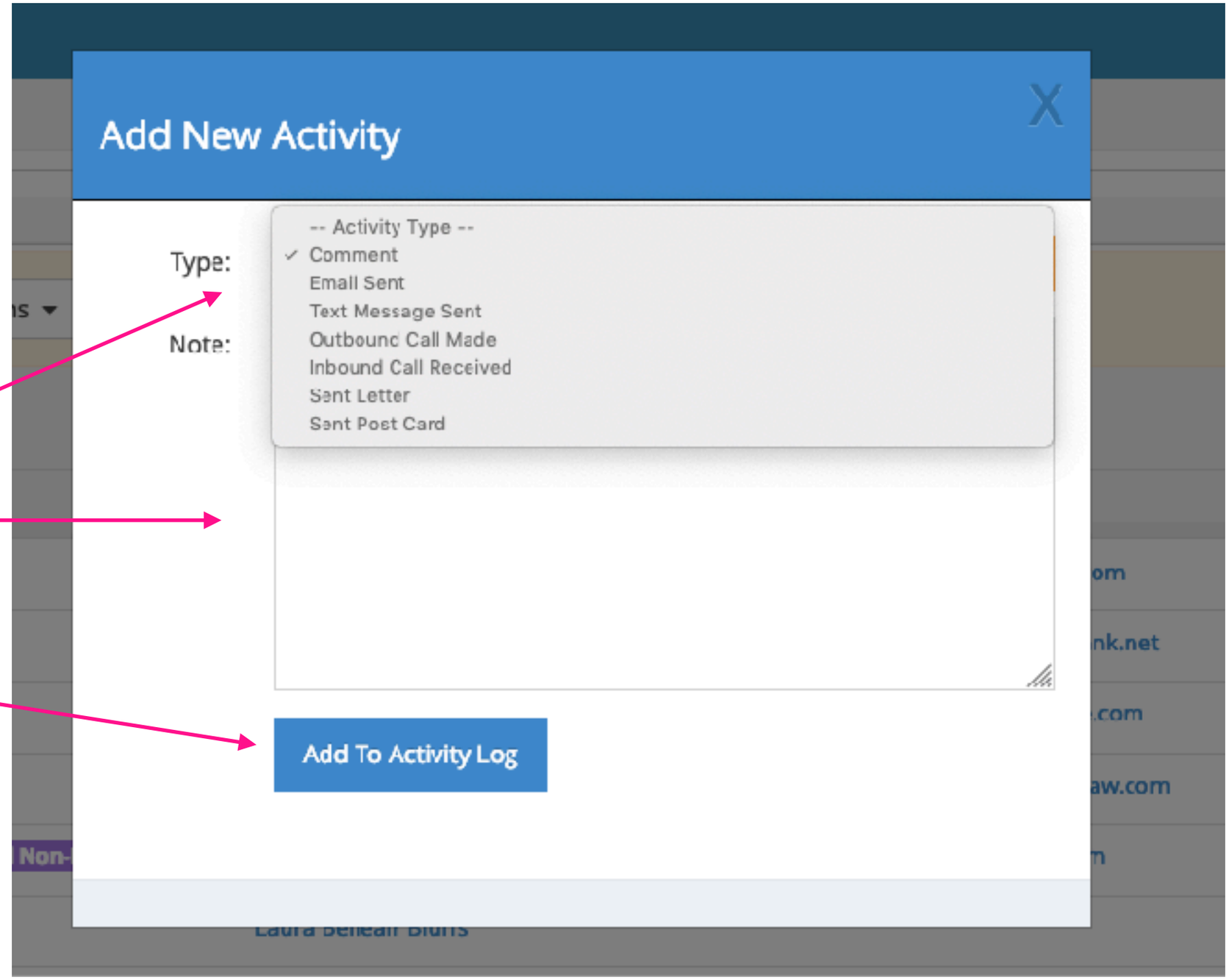
Add Activity

1.) Add Activity: Allows you to quickly add a "Comment" or another type of activity such as a phone call or email sent.

2.) Select the "Type" of activity.

3.) To log a note, select "Comment" and then type your note in the box below.

4.) Once finished click "Add To Activity Log".



Add Task

1.) Add Task: Allows you to add reminders for the contact such as wanting to be reminded to make a follow up call.

2.) Select a category. Categories are color coded to help you differentiate between them.

3.) Enter a description. Example: Call to confirm open house times for this Sunday.

4.) Enter any additional notes about the task. Example: Also, remind them I need to pick up their completed Home Facts-Ad Facts.

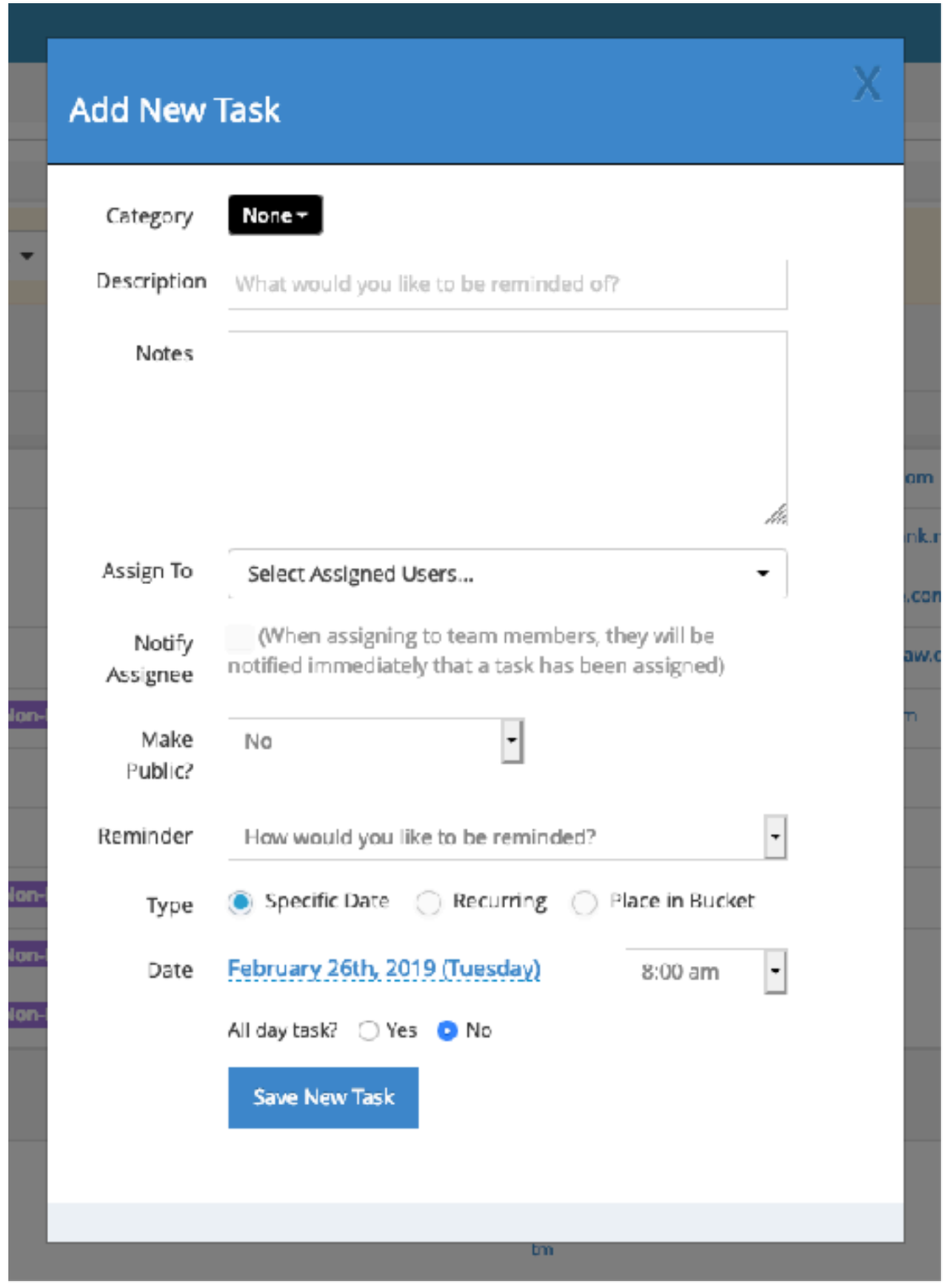
5.) Assign To: If it is a task for yourself to complete, select yourself. If adding a task for someone else on the team, select that team member.

6.) If the task is for someone else, click the "Notify Assignee" box.

7.) "Make Public?" Should be left "No".

8.) Reminder: You or the Assignee can be reminded by either an email, call, or text.

9.) Date: Select the date and time for the reminder.



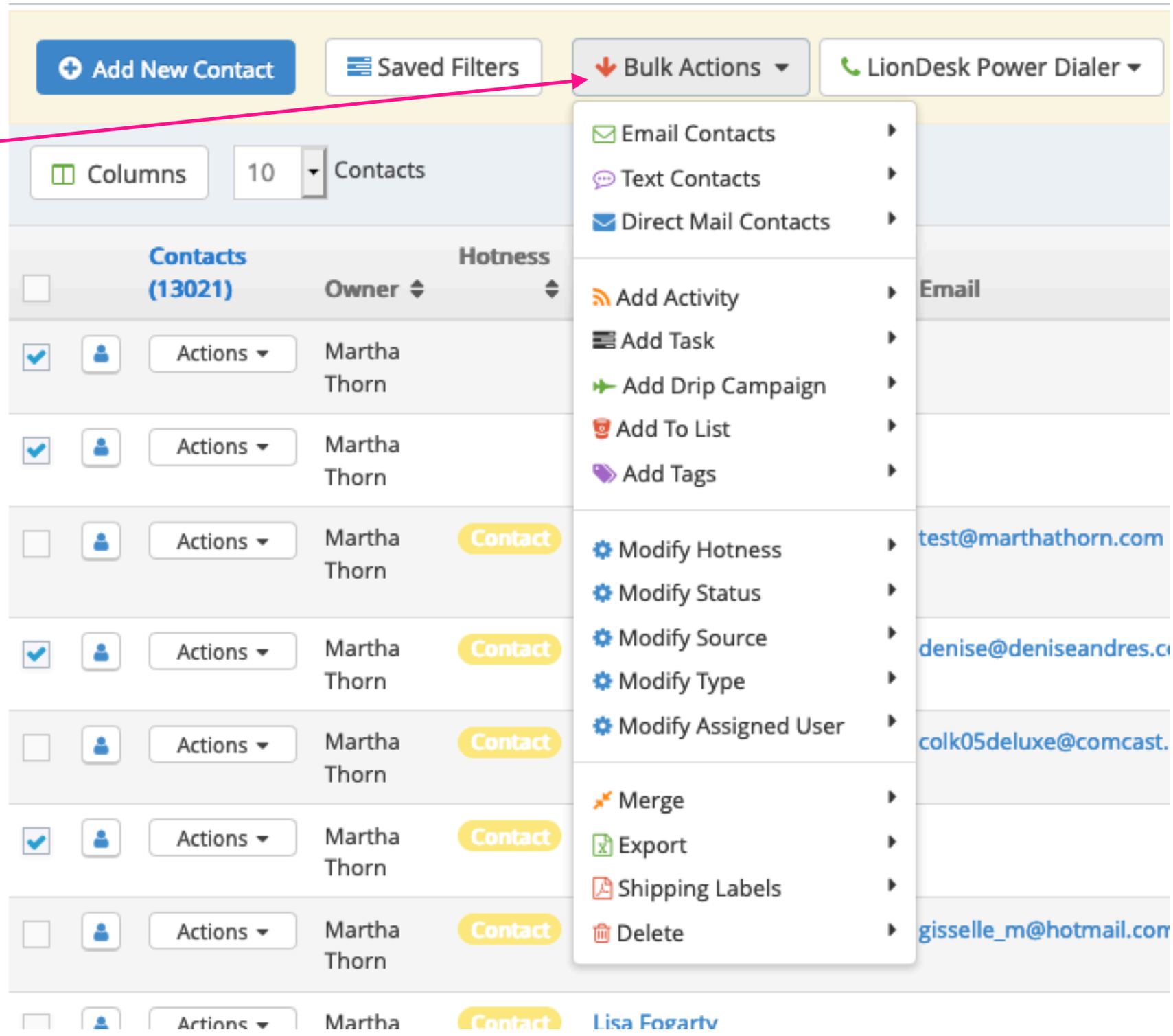
Bulk Actions

If you have several contacts that you want to update at one time, you can use the "Bulk Actions" tool.

1.) Check the contacts that you would like to bulk update.

2.) Click "Bulk Actions". A drop down will appear with the options that are available for a bulk update.

3.) Click the "Action" that you would like to take. You can add an "Activity" = Comment, or "Task" = Reminder, OR you can modify several contact's "Hotness" levels or types.



SECTION FOUR:

The Lion Desk App

Questions

Questions