



LION DESK

The New Home of The Thorn Collection

LION DESK

THE NEW HOME OF THE THORN COLLECTION

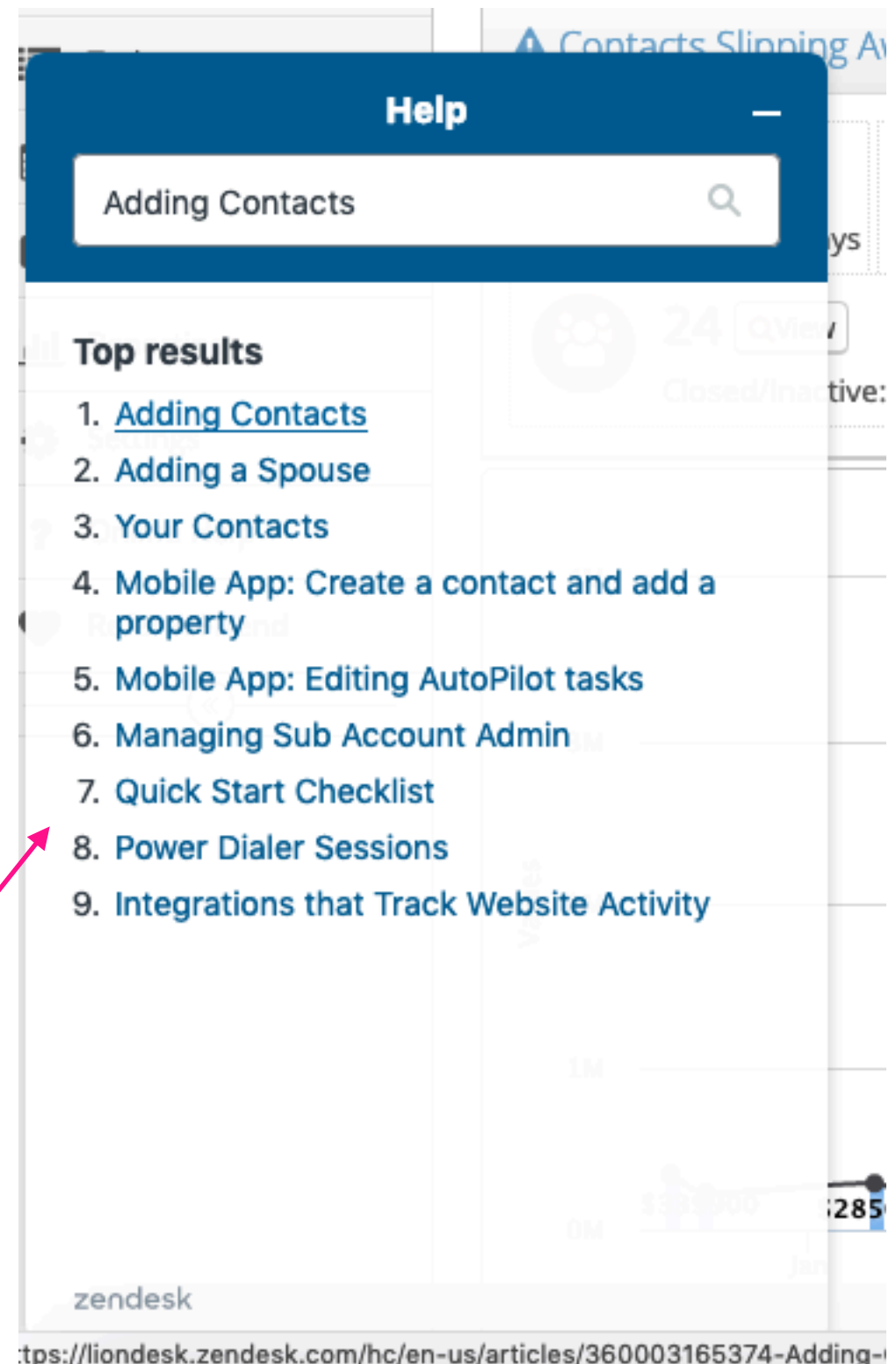
Section One: Profiles

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:

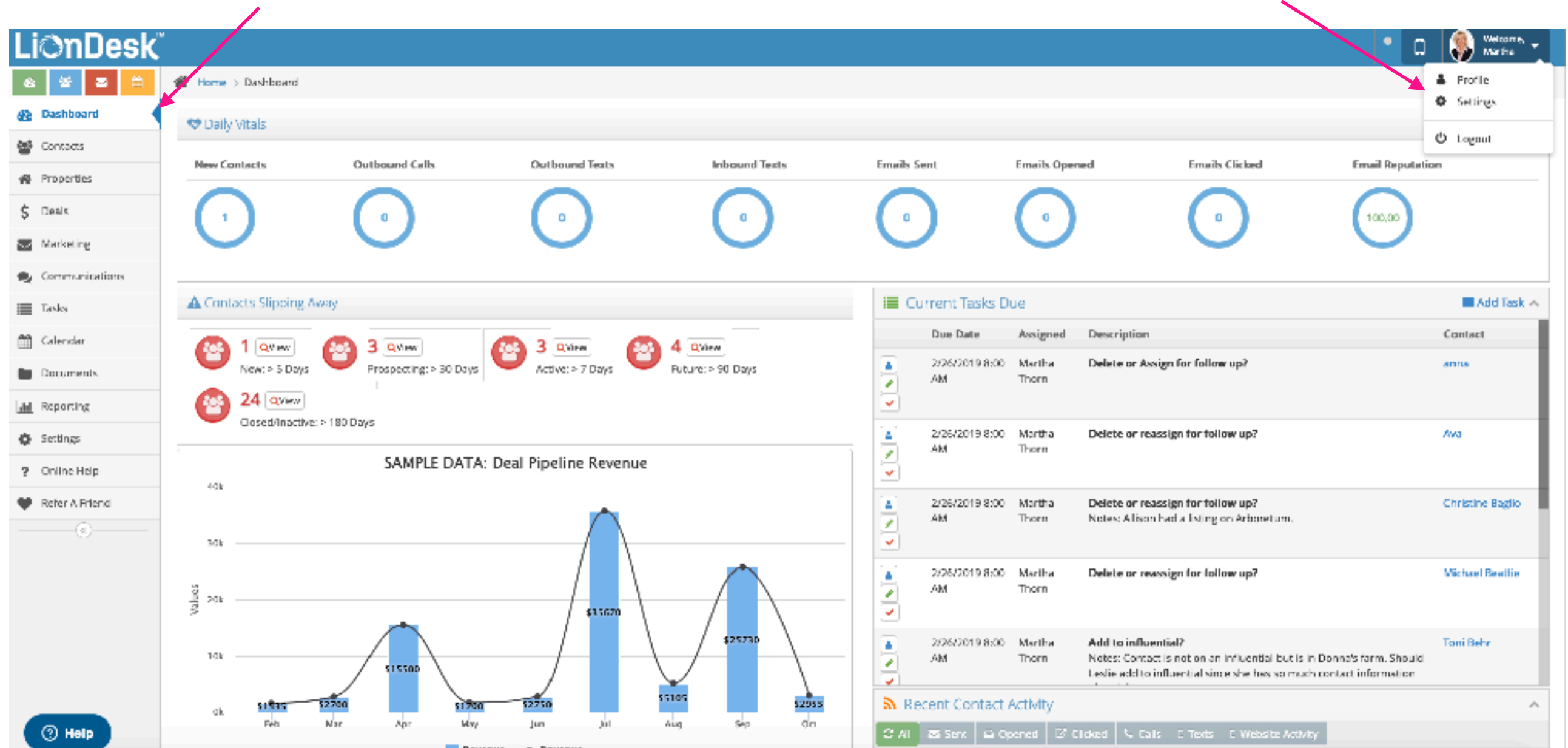
- 1.) Your Phone Number - Needed to make calls directly from Lion Desk.*
- 2.) Your Picture - Appears on your public Lion Desk webpages.*
- 3.) Your Introduction - Appears on your public Lion Desk webpages.*
- 4.) Your Email Signature - Appears at the bottom of any emails that you send from Lion Desk.*
- 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.

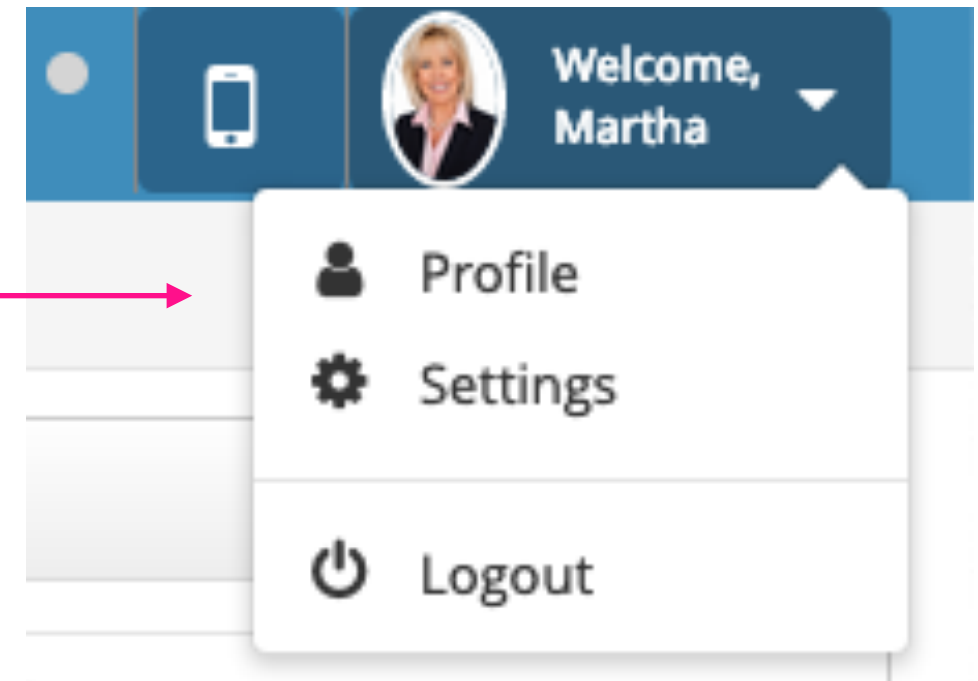
On the left hand side of the screen you have your navigation menu.

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

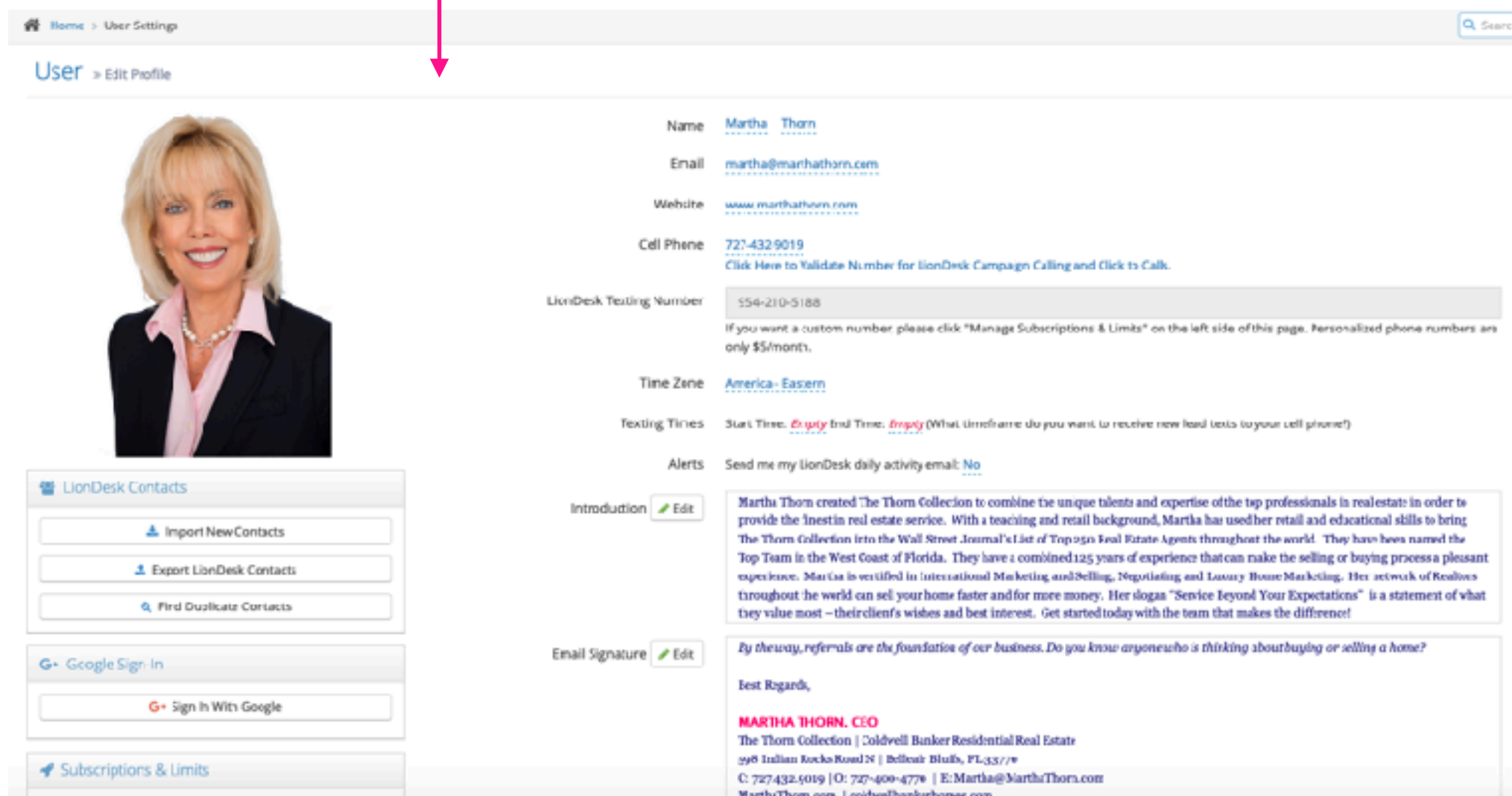


If you ever feel lost, just click on “Dashboard” and you will be back to the main screen.

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



Your profile will then appear.

A screenshot of a user profile page. The page has a header with 'Home > User Settings' and a search bar. Below the header, there's a 'User > Edit Profile' section. On the left, there's a profile picture of a woman. To the right of the picture, there's a form with various fields: Name (Martha Thorn), Email (martha@marthathorn.com), Website (www.marthathorn.com), Cell Phone (727-432-9019), LionDesk Texting Number (554-210-5188), Time Zone (America - Eastern), Texting Times (Start Time: Empty, End Time: Empty), Alerts (Send me my LionDesk daily activity email: No), Introduction (with an Edit button), and Email Signature (with an Edit button). Below the profile picture, there's a 'LionDesk Contacts' section with buttons for 'Import New Contacts', 'Export LionDesk Contacts', and 'Find Duplicate Contacts'. At the bottom, there's a 'Google Sign-In' section with a 'Sign In With Google' button, and a 'Subscriptions & Limits' section.

1.) Your Phone Number

1.) Click on the phone number that appears.

Name	Martha Thorn
Email	martha@marthathorn.com
Website	www.marthathorn.com
Cell Phone	727-432-9019 Click Here to Validate Number for LionDesk Campaign Calling and Click to Calls.
LionDesk Texting Number	<div>954-210-5188</div> <div>If you want a custom number, please click "Manage Subscriptions & Limits" on the left side of this page. Personalized phone numbers are only \$5/month.</div>
Time Zone	America - Eastern
Texting Times	Start Time: Empty End Time: Empty (What timeframe do you want to receive new lead texts to your cell phone?)
Alerts	Send me my LionDesk daily activity email: No

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

The screenshot shows a web form for uploading a photo. At the top left, there is a label 'Photo' next to a text input field containing the text 'Image Saved'. Below this, there is a label 'Photo Upload' next to a green rectangular area. Inside the green area, there is a white button labeled 'Browse...' and the text 'No files selected.' Below the green area is a blue button labeled 'Save Photo'. Three pink arrows point to these elements: one from the instruction '1.) Click Browse...' to the 'Browse...' button, one from '2.) Click Save Photo...' to the 'Save Photo' button, and one from '3.) Once the photo has saved...' to the 'Image Saved' text in the input field. Above the green area, there is a line of text: 'Image files only (jpg/png/gif/tiff) less than 3MB'.

Photo

Image Saved

Image files only (jpg/png/gif/tiff) less than 3MB

Photo Upload

Browse... No files selected.

Save Photo

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.

Introduction	 Edit
Email Signature	 Edit
Photo	Image Saved
Photo Upload	<div>Image files only (jpg/png/gif/tiff) less than 3MB</div> <div><div><div>Browse...</div><div>No files selected.</div></div><div>Save Photo</div></div>

Martha Thorn created The Thorn Collection to combine the unique talents and expertise of the top professionals in real estate in order to provide the finest in real estate service. With a teaching and retail background, Martha has used her retail and educational skills to bring The Thorn Collection into the Wall Street Journal's List of Top 250 Real Estate Agents throughout the world. They have been named the Top Team in the West Coast of Florida. They have a combined 125 years of experience that can make the selling or buying process a pleasant experience. Martha is certified in International Marketing and Selling, Negotiating and Luxury Home Marketing. Her network of Realtors throughout the world can sell your home faster and for more money. Her slogan "Service Beyond Your Expectations" is a statement of what they value most – their client's wishes and best interest. Get started today with the team that makes the difference!

By the way, referrals are the foundation of our business. Do you know anyone who is thinking about buying or selling a home?

Best Regards,

MARTHA THORN, CEO
The Thorn Collection | Coldwell Banker Residential Real Estate
598 Indian Rocks Road N | Belleair Bluffs, FL 33770
C: 727-432-9019 | O: 727-400-4770 | E: Martha@MarthaThorn.com
MarthaThorn.com | coldwellbankerhomes.com

#1 Real Estate Team in Pinellas County – Over Half a Billion in Sales!

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

Time Zone America - Eastern

Texting Times

Alerts

Introduction ☒ Save Introduction

Normal (... Georgia Size A A LionDesk Video

Martha Thorn created The Thorn Collection to combine the unique talents and expertise of the top professionals in real estate in order to provide the finest in real estate service. With a teaching and retail background, Martha has used her retail and educational skills to bring The Thorn Collection into the Wall Street Journal's List of Top 250 Real Estate Agents throughout the world. They have been named the Top Team in the West Coast of Florida. They have a combined 125 years of experience that can make the selling or buying process a pleasant experience. Martha is certified in International Marketing and Selling, Negotiating and Luxury Home Marketing. Her network of Realtors throughout the world can sell your home faster and for more money. Her slogan "Service Beyond Your Expectations" is a statement of what they value most – their client's wishes and best interest. Get started today with the team that makes the difference!

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!

Introduction 

Martha Thorn created The Thorn Collection to combine the unique talents and expertise of the top professionals in real estate in order to provide the finest in real estate service. With a teaching and retail background, Martha has used her retail and educational skills to bring The Thorn Collection into the Wall Street Journal's List of Top 250 Real Estate Agents throughout the world. They have been named the Top Team in the West Coast of Florida. They have a combined 125 years of experience that can make the selling or buying process a pleasant experience. Martha is certified in International Marketing and Selling, Negotiating and Luxury Home Marketing. Her network of Realtors throughout the world can sell your home faster and for more money. Her slogan "Service Beyond Your Expectations" is a statement of what they value most – their client's wishes and best interest. Get started today with the team that makes the difference!

Email Signature 

By the way, referrals are the foundation of our business. Do you know anyone who is thinking about buying or selling a home?

Best Regards,

MARTHA THORN, CEO
The Thorn Collection | Coldwell Banker Residential Real Estate
598 Indian Rocks Road N | Belleair Bluffs, FL 33770
C: 727-432-9019 | O: 727-400-4770 | E: Martha@MarthaThorn.com
MarthaThorn.com | coldwellbankerhomes.com

#1 Real Estate Team in Pinellas County – Over Half a Billion in Sales!


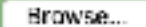

Photo 

Image files only (jpg/png/gif/tiff) less than 3MB

Photo Upload  No files selected.



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”.


 Contact Activity Timeline


 All


 Comments

 Sent/Rcvd


 Opened


 Clicked


 Calls





Search Activities


 **Don Chilton:** Contact assigned to Martha Thorn by Don Chilton


 2/26/2019 9:54 PM

 **Martha Thorn:** Contact assigned to Don Chilton by Martha Thorn

 2/26/2019 9:51 PM

 **Martha Thorn:** Contact assigned to Martha Thorn by Martha Thorn

 2/25/2019 4:53 PM

 Add New Activity

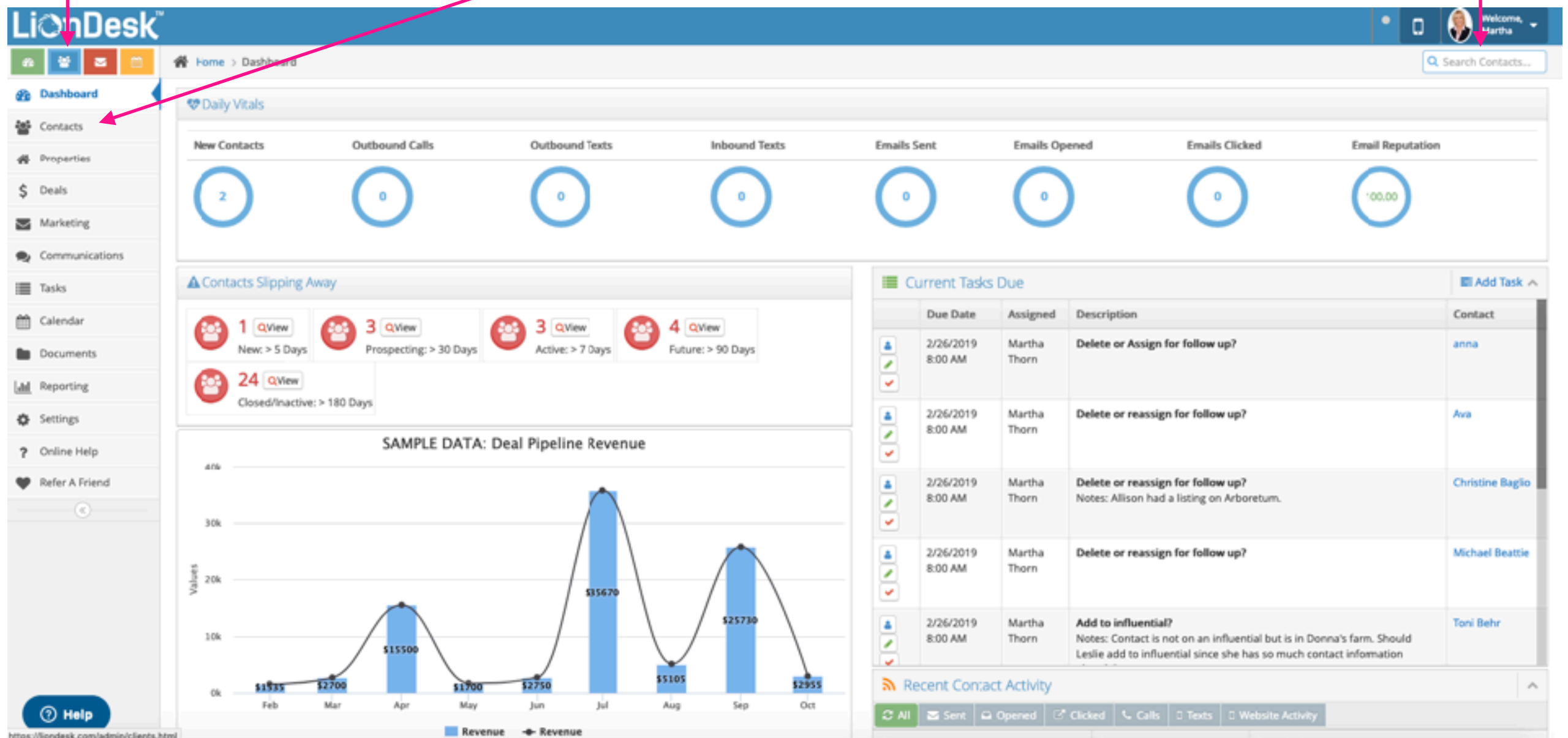
Below is your “Dashboard”. The dashboard is your welcome screen every time you log into Lion Desk. There are 3 ways to access contacts from the dashboard.

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



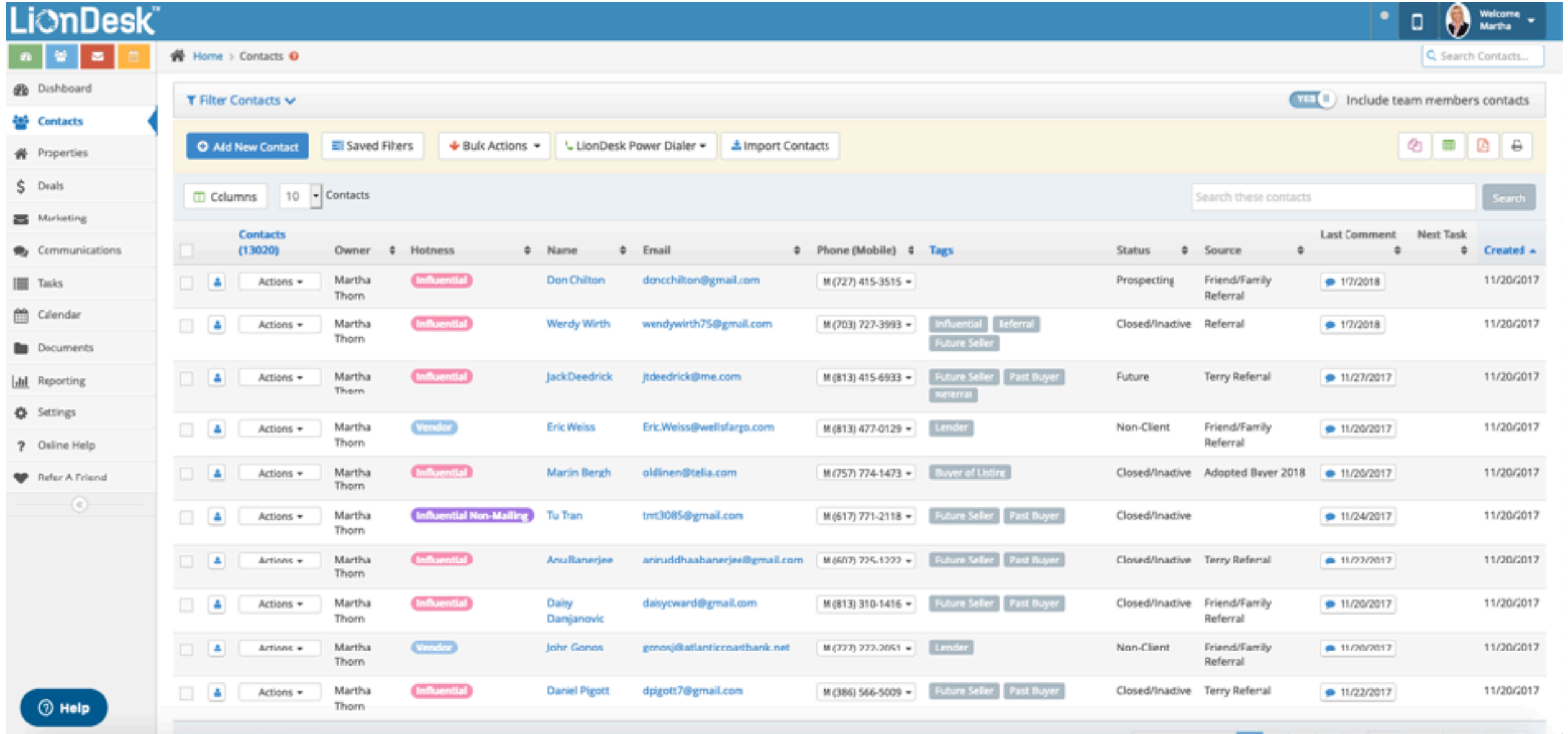
2.) Click the “Contacts” tab.

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.



The screenshot displays the LionDesk Contacts Preview Page. The interface features a blue header with the LionDesk logo and a user profile. A left sidebar contains navigation links for Dashboard, Contacts, Properties, Deals, Marketing, Communications, Tasks, Calendar, Documents, Reporting, Settings, Online Help, and Refer A Friend. The main content area is titled 'Filter Contacts' and includes a search bar, a 'YES' toggle for 'Include team members contacts', and buttons for 'Add New Contact', 'Saved Filters', 'Bulk Actions', 'LionDesk Power Dialer', and 'Import Contacts'. Below this is a 'Columns' dropdown set to '10' and a 'Search these contacts' input. The contacts are listed in a table with columns: Owner, Hotness, Name, Email, Phone (Mobile), Tags, Status, Source, Last Comment, Next Task, and Created. The table contains 10 rows of contact data.

Owner	Hotness	Name	Email	Phone (Mobile)	Tags	Status	Source	Last Comment	Next Task	Created
Martha Thorn	Influential	Don Chilton	dncchilton@gmail.com	M (727) 415-3515		Prospecting	Friend/Family Referral	11/20/2017		11/20/2017
Martha Thorn	Influential	Werdy Wirth	wendywirth75@gmail.com	M (703) 727-3993	Influential, Referral, Future Seller	Closed/Inactive	Referral	11/20/2017		11/20/2017
Martha Thorn	Influential	Jack Deedrick	jdeedrick@me.com	M (813) 415-6933	Future Seller, Past Buyer, Referral	Future	Terry Referral	11/27/2017		11/20/2017
Martha Thorn	Vendor	Eric Weiss	Eric.Weiss@wellsfargo.com	M (813) 477-0129	Lender	Non-Client	Friend/Family Referral	11/20/2017		11/20/2017
Martha Thorn	Influential	Martin Bergh	oldinen@telia.com	M (757) 774-1473	Buyer of Listing	Closed/Inactive	Adopted Buyer 2018	11/20/2017		11/20/2017
Martha Thorn	Influential Non-Mailing	Tu Tran	trt3085@gmail.com	M (617) 771-2118	Future Seller, Past Buyer	Closed/Inactive		11/24/2017		11/20/2017
Martha Thorn	Influential	Anuruddha Banerjee	anuruddhaabanerjee@gmail.com	M (607) 725-1222	Future Seller, Past Buyer	Closed/Inactive	Terry Referral	11/23/2017		11/20/2017
Martha Thorn	Influential	Daisy Danjanovic	daisycward@gmail.com	M (813) 310-1416	Future Seller, Past Buyer	Closed/Inactive	Friend/Family Referral	11/20/2017		11/20/2017
Martha Thorn	Vendor	Johr Gonos	gonosj@atlanticcoastbank.net	M (727) 772-2051	Lender	Non-Client	Friend/Family Referral	11/20/2017		11/20/2017
Martha Thorn	Influential	Daniel Pigott	dpigott7@gmail.com	M (386) 566-5009	Future Seller, Past Buyer	Closed/Inactive	Terry Referral	11/22/2017		11/20/2017

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 Appointment Co
1st Buyer Appointment 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 vendor, you will want to select the tag that applies to what that vendor does. So if it is a painter, the painter's hotness level would be VENDOR and his tag would be PAINTER.

Contact Tags	
Use tags for your contacts to search and keep track	
Tag Name	
1st Buyer Appointment Co	
1st Buyer Appointment 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	

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.

The screenshot displays a contact management interface for a contact named 'Don Chilton'. The interface is divided into two main sections: a left-hand side for contact details and a right-hand side for contact activities.

Left Hand Side (Contact Details):

- Header:** 'Don Chilton' with a blue background bar.
- Navigation Tabs:** Profile (selected), Marketing, Documents, Properties, Leads, Timeline, Gmail.
- Action Bar:** Includes buttons for 'Edit Contact', 'Add Activity', 'Add Task', 'Start Campaign', 'Add Deal', 'Add To List', 'Merge', and 'Cloud CRM'. There are also 'Prev' and 'Next' navigation buttons.
- Contact Fields:**
 - email:** donchilton@gmail.com (with an 'Email' icon), cc@contacts.liondesk.com (with a red error icon).
 - secondary email:** (empty field).
 - mobile phone:** (727) 415-3515 (with 'Call' and 'Text' icons).
 - home phone:** (empty field).
 - office phone:** (empty field).
 - address:** Home 330 Promenade Dr, Unit 103 Dunedin, FL 34698 (with a red error icon). Below it is a link to 'Add New Address'.
 - birthday:** 10/02/1988.
 - anniversary:** (empty field).
 - company:** Coldwell Banker.
 - TAGS:** Enter new tags here ... (with a link to 'View All Tags').
 - spouse info:** (empty field).
 - custom fields:**
 - Contract Notes: Empty (with a red trash can icon).
 - Letter Salutation: Empty (with a red star icon).
 - Owner Occupied: Empty (with a red star icon).
 - Link: Add New Custom Field Type.
 - status:** Prospecting.
 - SOURCE:** Friend/Family Referral.
 - OWNER:** Martha Thorne (with a green pencil icon).
 - occurrences:** Don Chilton (with a green pencil icon).

Right Hand Side (Contact Activity Timeline):

- Header:** 'Contact Activity Timeline' with a 'Refresh' button and a 'Scroll To View More' link.
- Filter Tabs:** All (selected), Comments, Sent/Recv, Opened, Clicked, Calls, E-Tests, Direct Mail, Website Activity.
- Search:** Search Activities (input field).
- Activity List:**
 - Activity 1: Martha Thorne: Called to follow up on listing appointment. 2/26/2019 8:39 PM (with green pencil and red trash can icons).
- Buttons:** 'Add New Activity' (red button).
- Associated Parties:**
 - Header: '+ Associated Parties'.
 - List:
 - Your Lender (Sample) (with a red star icon).
 - Your Escrow Rep (Sample) (with a red star icon).
 - Text: Add associated parties to this contact, such as your Lender, Escrow Rep, Appraiser, etc. You can quickly see their name, email and phone number!

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.

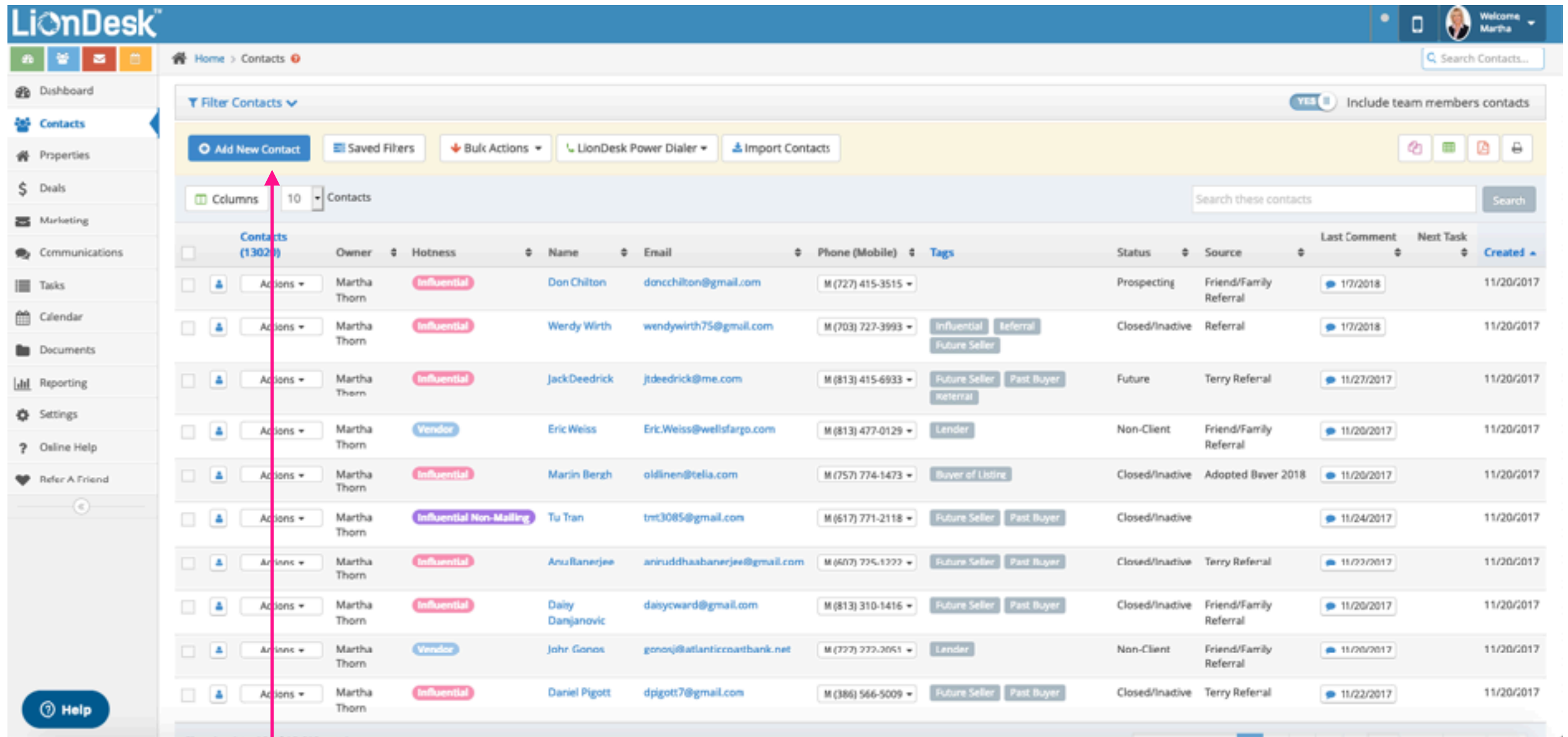


\$ Deals				
Status	Price	Stage	Property	Exp. Close
Add New Deal				

Tasks (Scroll To View Tasks ⬆ ⬆)					Follow up in 1 Days with a text reminder	Add Quick Task
Due Date ⬆	Assigned ⬆	Description ⬆	Category ⬆			
10/1/2018 6:00 AM	Don Chilton	Buyer Closing Timeline (Clone): Send copy of contract to title company handling closing.				
10/1/2018 9:00 AM	Don Chilton	Buyer Closing Timeline (Clone): Send copy of contract to lender & ask lender to order appraisal.				
10/2/2018 3:00 PM	Don Chilton	Buyer Closing Timeline (Clone): Schedule Home Inspection.				
10/4/2018 6:00 PM	Don Chilton	Buyer Closing Timeline: Earnest Money Deposit Due.				
10/4/2018 6:00 PM	Don Chilton	Buyer Closing Timeline (Clone): Earnest Money Deposit Due.				
10/7/2018 6:00 AM	Don Chilton	Buyer Closing Timeline: Verify appraisal ordered by lender.				
10/7/2018	Don	Buyer Closing Timeline (Clone): Verify appraisal ordered by lender.				
Add New Task						

AutoPilot Drip Campaign Tasks					
AutoPilot	Assigned	Task Type	Template	Subject	Send @
Add New Auto Pilot					

Adding New Contacts



The screenshot shows the LionDesk interface with the 'Contacts' page selected. The left sidebar contains navigation links: Dashboard, Contacts, Properties, Deals, Marketing, Communications, Tasks, Calendar, Documents, Reporting, Settings, Online Help, and Refer A Friend. The main content area has a 'Filter Contacts' dropdown and a 'YES Include team members contacts' toggle. Below this is a toolbar with buttons for '+ Add New Contact', 'Saved Filters', 'Bulk Actions', 'LionDesk Power Dialer', and 'Import Contacts'. A search bar for 'Search these contacts' is also present. The contacts list is displayed with columns: Owner, Hotness, Name, Email, Phone (Mobile), Tags, Status, Source, Last Comment, Next Task, and Created. The list contains 10 contacts, all owned by Martha Thorn. A pink arrow points to the '+ Add New Contact' button.

Owner	Hotness	Name	Email	Phone (Mobile)	Tags	Status	Source	Last Comment	Next Task	Created
Martha Thorn	Influential	Don Chilton	donchilton@gmail.com	M (727) 415-3515		Prospecting	Friend/Family Referral	1/7/2018		11/20/2017
Martha Thorn	Influential	Werdy Wirth	wendywirth75@gmail.com	M (703) 727-3993	Influential, Referral, Future Seller	Closed/Inactive	Referral	1/7/2018		11/20/2017
Martha Thorn	Influential	Jack Deedrick	jtedrick@me.com	M (813) 415-6933	Future Seller, Past Buyer, Referral	Future	Terry Referral	11/27/2017		11/20/2017
Martha Thorn	Vendor	Eric Weiss	Eric.Weiss@wellsfargo.com	M (813) 477-0129	Lender	Non-Client	Friend/Family Referral	11/20/2017		11/20/2017
Martha Thorn	Influential	Marin Bergh	oldinen@tella.com	M (757) 774-1473	Buyer of Listing	Closed/Inactive	Adopted Buyer 2018	11/20/2017		11/20/2017
Martha Thorn	Influential Non-Mailing	Tu Tran	tnt3085@gmail.com	M (617) 771-2118	Future Seller, Past Buyer	Closed/Inactive		11/24/2017		11/20/2017
Martha Thorn	Influential	Anurudha Banerjee	anuruddhaabanerjee@gmail.com	M (607) 725-1222	Future Seller, Past Buyer	Closed/Inactive	Terry Referral	11/22/2017		11/20/2017
Martha Thorn	Influential	Daisy Danjanovic	daisycward@gmail.com	M (813) 310-1416	Future Seller, Past Buyer	Closed/Inactive	Friend/Family Referral	11/20/2017		11/20/2017
Martha Thorn	Vendor	John Gonon	gononj@atlanticcoastbank.net	M (727) 222-2051	Lender	Non-Client	Friend/Family Referral	11/20/2017		11/20/2017
Martha Thorn	Influential	Daniel Pigott	dpigott7@gmail.com	M (386) 566-5009	Future Seller, Past Buyer	Closed/Inactive	Terry Referral	11/22/2017		11/20/2017

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.

Add New Contact

Personal Information

* First Name

Last Name

Email Address

Mobile Number

Home Number

Office Number

Birthday (mm/dd/yyyy)

Company

* Add/Edit Addresses

Spouse Information

Spouse Name

Spouse Email

Spouse Birthday (mm/dd/yyyy)

Spouse Phone

* Save New Contact

Organize By:

Select Hotness Level...

Select Tags...

Enter new tags here ...

Select Lead Source...

~~Select Current Status...~~

Select Contact Type...

~~Select Contact Lists...~~

Select Assigned User...

Comments:

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.

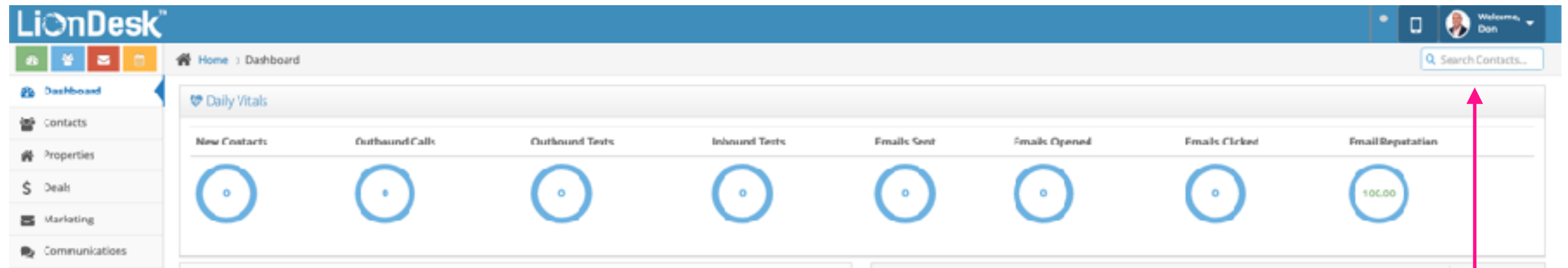
If you have a property address for the contact, search that address to see if it is on someones farm. If the contact is on someones form, submit the Thorn Portal “New Contact Lead” form and select that agent. They will then have 24 hours to respond.

SECTION THREE:

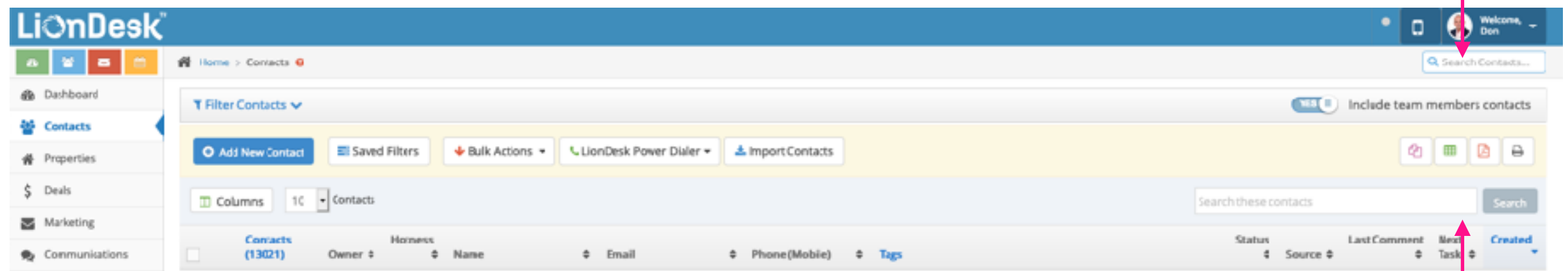
Searching Contacts
Quick Edits



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.

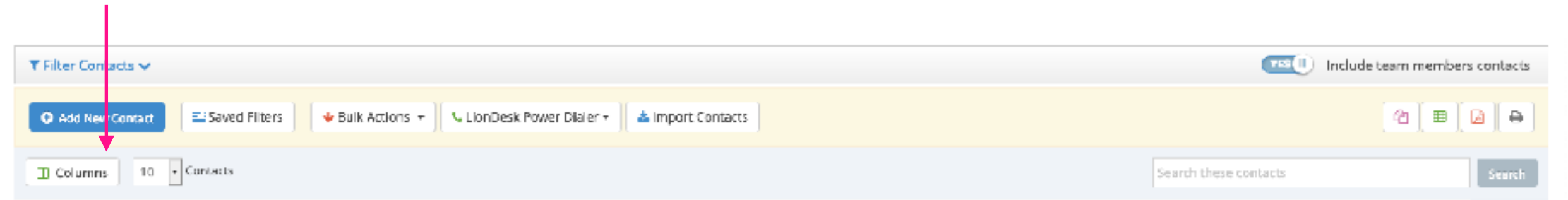
1.) To search for specific contacts, you can select “Filter Contacts” where a drop down will appear that gives you various search options.

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

The screenshot shows the LionDesk Contacts Preview Page. The interface includes a sidebar with navigation options and a main content area displaying a list of contacts. A red arrow points to the 'Filter Contacts' dropdown, and another red arrow points to the 'Include team members contacts' toggle.

Contacts (13020)	Owner	Hotness	Name	Email	Phone (Mobile)	Tags	Status	Source	Last Comment	Next Task	Created
<input type="checkbox"/> Actions	Martha Thorn	Influential	Don Chilton	donchilton@gmail.com	M (727) 415-3515		Prospecting	Friend/Family Referral	11/20/2017		11/20/2017
<input type="checkbox"/> Actions	Martha Thorn	Influential	Werdy Wirth	wendywirth75@gmail.com	M (703) 727-3993	Influential Referral Future Seller	Closed/Inactive	Referral	11/20/2017		11/20/2017
<input type="checkbox"/> Actions	Martha Thorn	Influential	Jack Deedrick	jideedrick@me.com	M (813) 415-6933	Future Seller Past Buyer Referral	Future	Terry Referral	11/27/2017		11/20/2017
<input type="checkbox"/> Actions	Martha Thorn	Vendor	Eric Weiss	Eric.Weiss@wellsfargo.com	M (813) 477-0129	Lender	Non-Client	Friend/Family Referral	11/20/2017		11/20/2017
<input type="checkbox"/> Actions	Martha Thorn	Influential	Marin Bergh	oldlinen@telia.com	M (757) 774-1473	Buyer of Listing	Closed/Inactive	Adopted Buyer 2018	11/20/2017		11/20/2017
<input type="checkbox"/> Actions	Martha Thorn	Influential Non-Mailing	Tu Tran	tmt3085@gmail.com	M (617) 771-2118	Future Seller Past Buyer	Closed/Inactive		11/24/2017		11/20/2017
<input type="checkbox"/> Actions	Martha Thorn	Influential	Anurudha Banerjee	anurudhaabanerjee@gmail.com	M (607) 725-1222	Future Seller Past Buyer	Closed/Inactive	Terry Referral	11/23/2017		11/20/2017
<input type="checkbox"/> Actions	Martha Thorn	Influential	Daisy Danjanovic	daisycward@gmail.com	M (813) 310-1416	Future Seller Past Buyer	Closed/Inactive	Friend/Family Referral	11/20/2017		11/20/2017
<input type="checkbox"/> Actions	Martha Thorn	Vendor	John Gonos	gonosj@atlanticcoastbank.net	M (727) 772-2051	Lender	Non-Client	Friend/Family Referral	11/20/2017		11/20/2017
<input type="checkbox"/> Actions	Martha Thorn	Influential	Daniel Pigott	dpigott7@gmail.com	M (386) 566-5009	Future Seller Past Buyer	Closed/Inactive	Terry Referral	11/22/2017		11/20/2017

Adjusting Your View

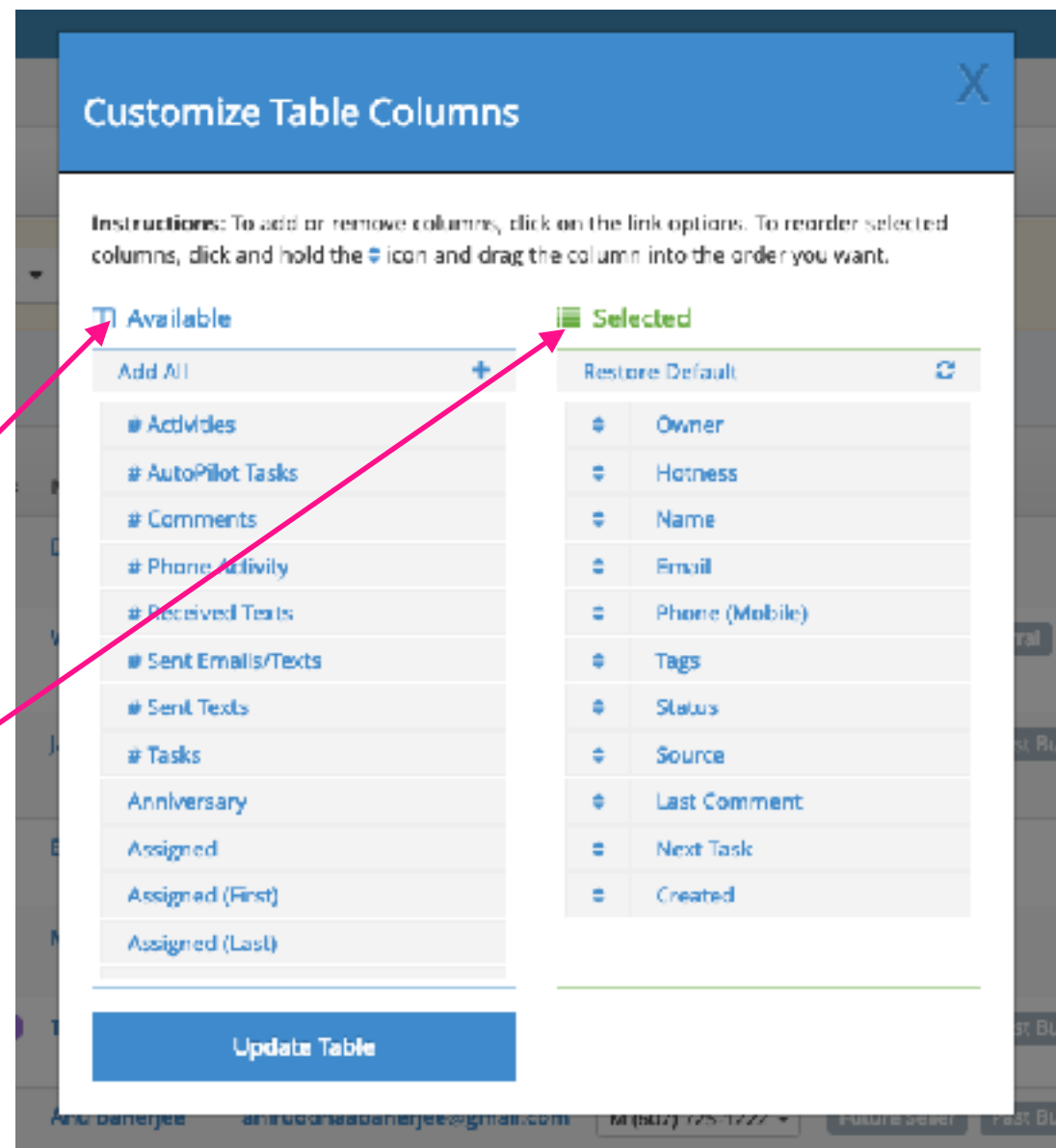


1.) When you click “Columns”, you then have the option to select the different columns that you can see. Everyone will be different, there is no right or wrong way to view your contacts.

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


- Assigned
- 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".

Customize Table Columns

Instructions: To add or remove columns, click on the link options. To reorder selected columns, click and hold the  icon and drag the column into the order you want.

Available

Add All

Activities

AutoPilot Tasks

Comments

Phone Activity

Received Texts

Sent Emails/Texts

Sent Texts

Tasks

Anniversary

Assigned (First)

Assigned (Last)

Birthday

Selected

Restore Default

Assigned

Hotness

Name

Home Address 1

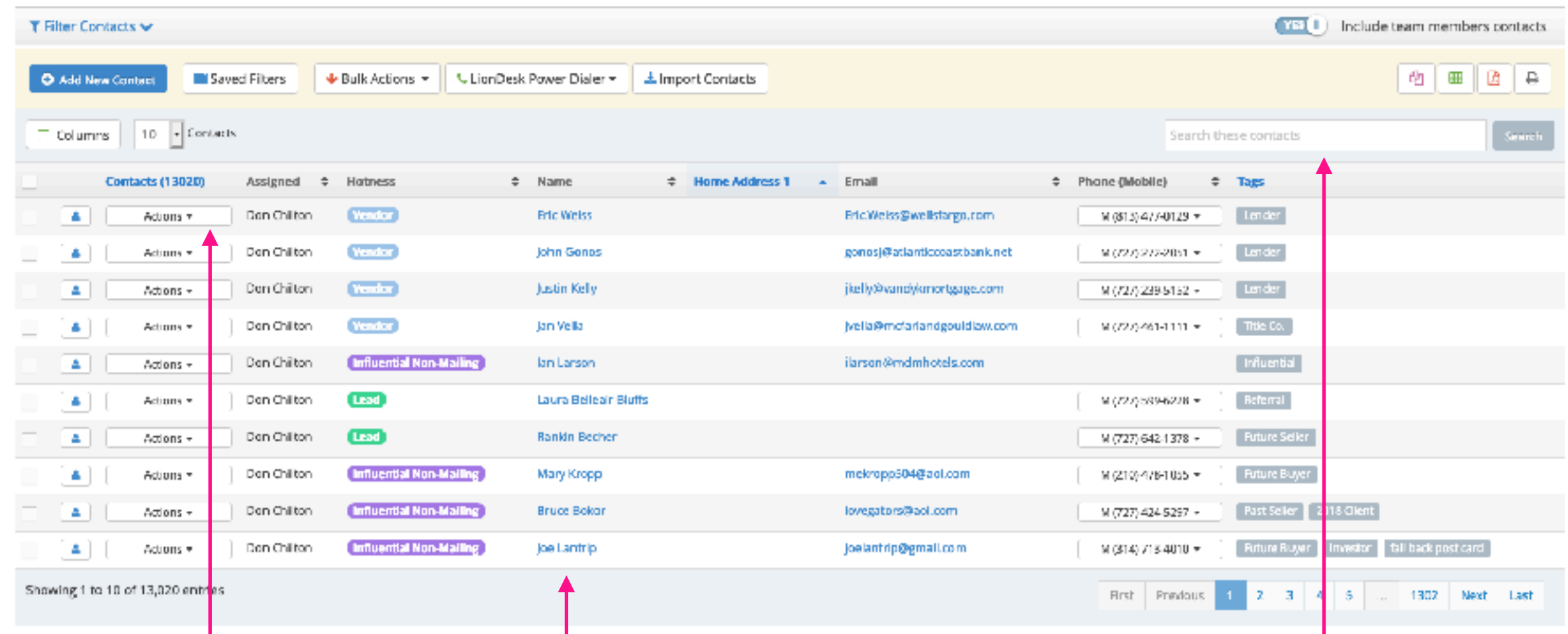
Email

Phone (Mobile)

Tags

Update Table

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



The screenshot shows a CRM interface for managing contacts. At the top, there's a 'Filter Contacts' dropdown and a toggle for 'Include team members contacts'. Below this is a toolbar with buttons for 'Add New Contact', 'Saved Filters', 'Bulk Actions', 'LionDesk Power Dialer', and 'Import Contacts'. A search bar labeled 'Search these contacts' is on the right. The main table has columns: 'Assigned', 'Hortness', 'Name', 'Home Address 1', 'Email', 'Phone (Mobile)', and 'Tags'. The first column is labeled 'Contacts (13020)'. Each row represents a contact, with an 'Actions' dropdown menu to the left of the 'Assigned' column. A pink arrow points from the text 'To quickly access a contact to make changes, click "Actions" next to the contact.' to the 'Actions' dropdown of the first contact. Another pink arrow points from the text 'To open a contact, click on the contact name.' to the 'Name' column header. A third pink arrow points from the text 'To do a quick search for an individual contact, you can type a name into the "Search these contacts" box.' to the search bar. The table shows 10 contacts, with a footer indicating 'Showing 1 to 10 of 13,020 entries' and a pagination control.

Contacts (13020)	Assigned	Hortness	Name	Home Address 1	Email	Phone (Mobile)	Tags
Actions ▾	Don Chilton	Vendor	Eric Weiss		EricWeiss@wellstango.com	M (813) 477-40129 ▾	Lender
Actions ▾	Don Chilton	Vendor	John Gones		gonosj@atlanticoastbank.net	M (727) 277-2111 ▾	Lender
Actions ▾	Don Chilton	Vendor	Justin Kelly		jkelly@vandykumortgage.com	M (727) 239-5152 ▾	Lender
Actions ▾	Don Chilton	Vendor	Jon Vella		jvella@mcfarlandgouldlaw.com	M (727) 461-1111 ▾	Title Co.
Actions ▾	Don Chilton	Influential Non-Mailing	Jon Larson		ilarsen@mdmhotels.com		Influential
Actions ▾	Don Chilton	Lead	Laura Belleair Bluffs			M (727) 589-6278 ▾	Referral
Actions ▾	Don Chilton	Lead	Rankin Becher			M (727) 642-1378 ▾	Future Seller
Actions ▾	Don Chilton	Influential Non-Mailing	Mary Kropp		mekropp504@aol.com	M (210) 476-1035 ▾	Future Buyer
Actions ▾	Don Chilton	Influential Non-Mailing	Bruce Bokor		lovegators@aol.com	M (727) 424-5257 ▾	Past Seller 2118 Client
Actions ▾	Don Chilton	Influential Non-Mailing	Joe Lantrip		joe.lantrip@gmail.com	M (314) 715-4010 ▾	Future Buyer Investor fall back post card

Showing 1 to 10 of 13,020 entries

First Previous 1 2 3 4 5 ... 1302 Next Last

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.

The screenshot shows the 'Filter Contacts' interface. At the top right, there is a toggle switch for 'Include team members contacts' set to 'YES'. On the left side, there are several filter categories: 'Contacts with no active campaign' (OFF), 'Contacts with no future task' (OFF), 'Hotness' (a dropdown menu), 'Include All Tags' (OFF), and 'Search Phrase' (a text input field with radio buttons for 'Any', 'All', and 'Exact'). In the center, there are several date and count filters: 'Last Email/Text Sent' (after/before), '# of Times Emailed/Texted' (min/max), 'Last Commented' (after/before), '# of Times Commented' (min/max), '# of Text Replies From Contact' (min/max), '# of Texts Sent To Contact' (min/max), and 'Other Contact Dates' (a date range selector). On the right side, there are dropdown menus for 'Contact Source', 'Contact Status', 'Contact Type', 'Contact List/Bucket', and 'Assigned To'. At the bottom left, there are three buttons: 'Apply Filters', 'Create New Saved Filter', and 'Reset Filters'. Two pink arrows point from the text below to the interface: one points to the 'Hotness' dropdown, and the other points to the 'Include team members contacts' toggle.

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

The screenshot shows the 'Filter Contacts' interface. On the left, there are several filter categories: 'Contacts with no active campaign' (OFF), 'Contacts with no future task' (OFF), 'Hotness' (a dropdown menu), 'Include All Tags' (OFF), 'Search Phrase' (a text input field), and search mode options (Any, All, Exact). In the center, there are multiple rows of filters for numerical and date-based criteria, each with 'after', '=', and 'before' operators. On the right, there are dropdown menus for 'Contact Source', 'Contact Status', 'Contact Type', 'Contact List/Bucket', and 'Assigned To'. A red arrow points from the 'Assigned To' dropdown to the text 'To check just your Influential List:'. Another red arrow points from the 'Hotness' dropdown to the text '-Select "Hotness" Influential and Influential Non-Mailing'.

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.

The screenshot displays the 'Filter Contacts' interface. At the top, there's a header with 'Filter Contacts' and a toggle for 'Include team members contacts' (set to 'YES'). The main area is divided into three columns of filter options:

- Left Column:**
 - Contacts with no active campaign (OFF)
 - Contacts with no future task (OFF)
 - Hotness: Select Hotness ...
 - Include All Tags (OFF): Select a Tag...
 - Search Phrase: Enter word or phrase... (Any, All, Exact)
- Middle Column:**
 - Last Email/Text Sent: after, before
 - # of Times Emailed/Texted: min, max
 - Last Commented: after, before
 - # of Times Commented: min, max
 - # of Text Replies From Contact: min, max
 - # of Texts Sent To Contact: min, max
 - Other Contact Dates: -- Other Dates --
- Right Column:**
 - Contact Source: Select Contact Source...
 - Contact Status: Select Contact Status...
 - Contact Type: Select Contact Type...
 - Contact List/Bucket: Select Contact List...
 - Assigned To: Select Assigned User...

At the bottom, there are three buttons: 'Apply Filters', 'Create New Saved Filter' (highlighted with a red arrow), and 'Reset Filters'. A 'View IDX Filters' link is also present above the buttons.

After you’ve input your filter options, you can saved filter by clicking on “Create New Saved Filter”.

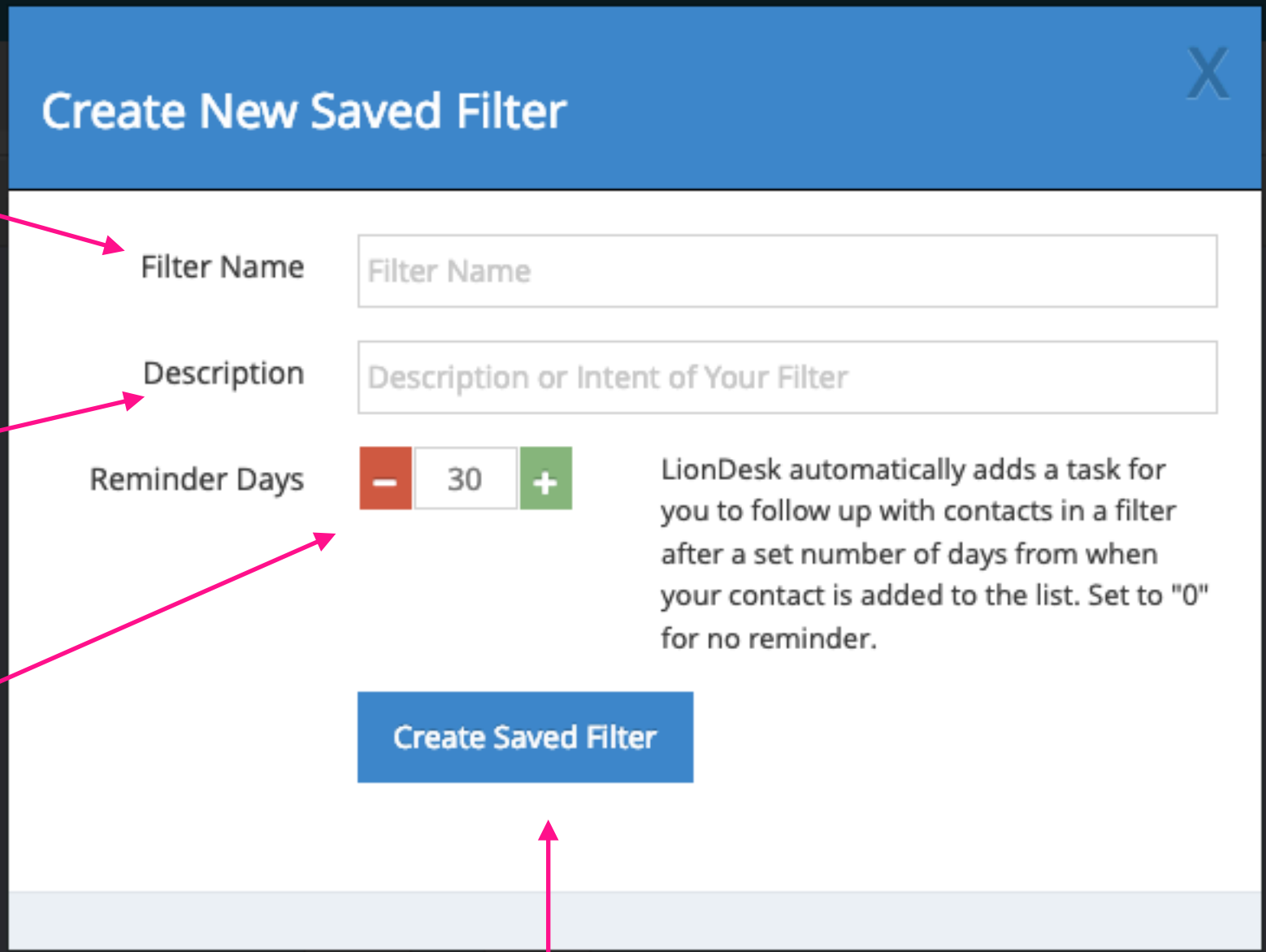
Saved Filters

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.



The screenshot shows a form titled "Create New Saved Filter" with a blue header bar containing a close button (X). The form has three main input fields: "Filter Name" with a placeholder "Filter Name", "Description" with a placeholder "Description or Intent of Your Filter", and "Reminder Days" with a numeric input set to "30" and minus/plus buttons. A blue "Create Saved Filter" button is at the bottom. A pink arrow points from the text "You will want to name your filter" to the "Filter Name" field. Another pink arrow points from the text "Enter a brief description of your list" to the "Description" field. A third pink arrow points from the text "For reminder days, put '0'" to the "Reminder Days" field.

Create New Saved Filter

Filter Name

Description

Description or Intent of Your Filter

Reminder Days

30

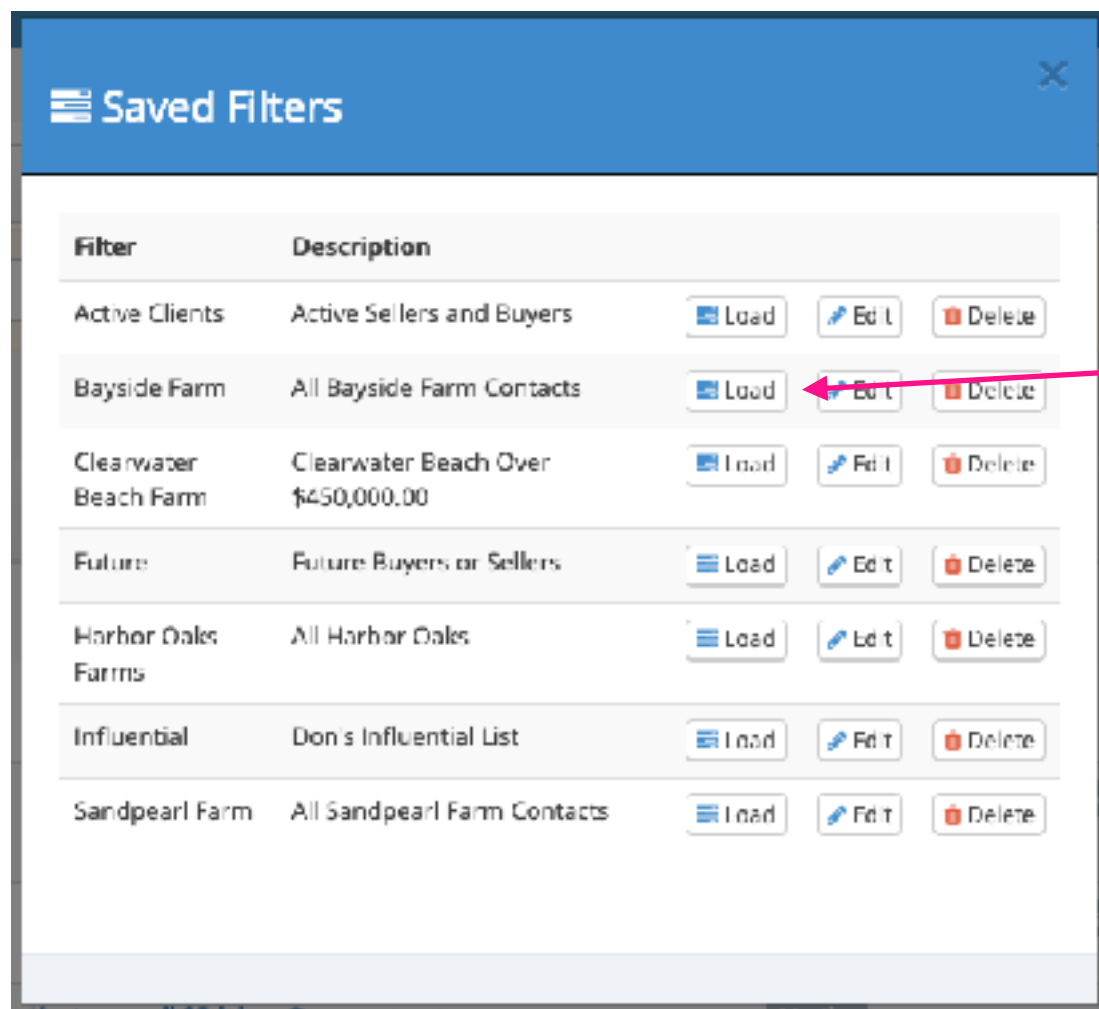
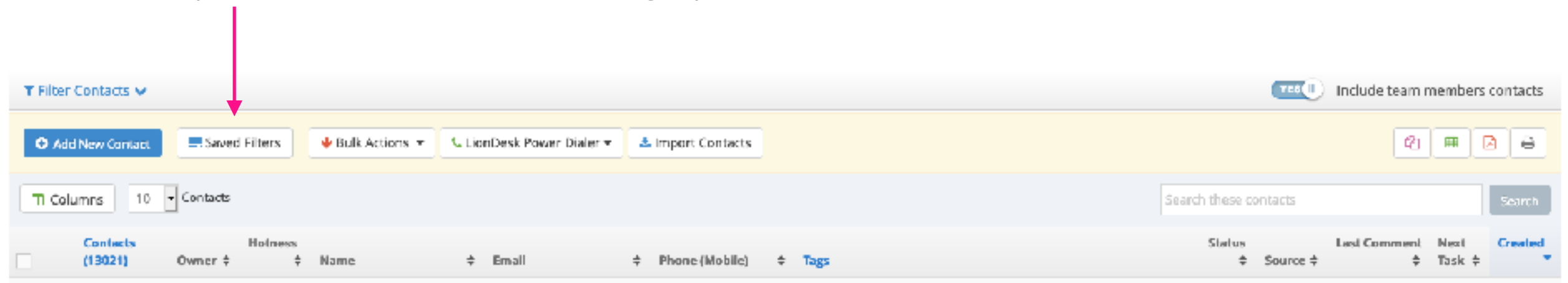
LionDesk automatically adds a task for you to follow up with contacts in a filter after a set number of days from when your contact is added to the list. Set to "0" for no reminder.

Create Saved Filter

Click "Create Saved Filter"

Saved Filters

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



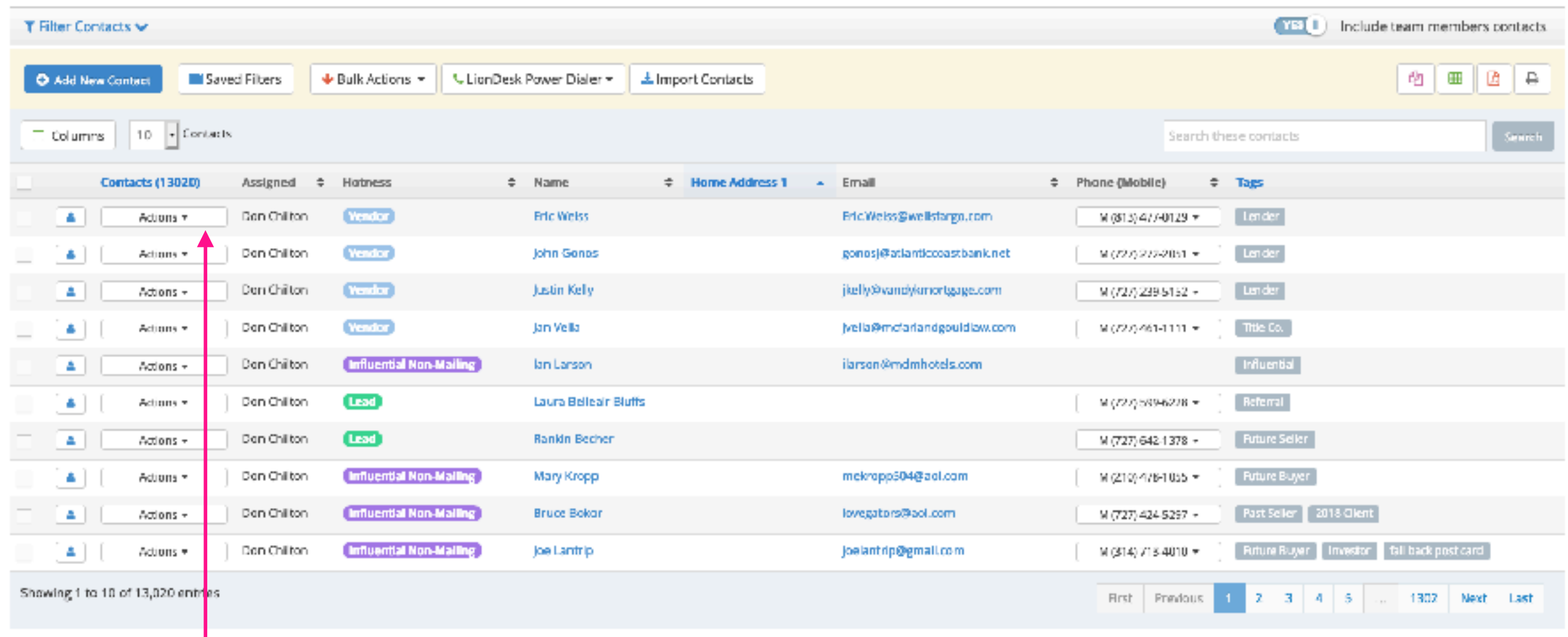
Your saved filters will appear!

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.



The screenshot shows the Lion Desk interface for managing contacts. At the top, there's a 'Filter Contacts' dropdown and a 'YES' button with the text 'Include team members contacts'. Below this is a toolbar with buttons for 'Add New Contact', 'Saved Filters', 'Bulk Actions', 'LionDesk Power Dialer', and 'Import Contacts'. A search bar is on the right. The main table has columns: 'Assigned', 'Harness', 'Name', 'Home Address 1', 'Email', 'Phone (Mobile)', and 'Tags'. The first contact, Eric Weiss, is highlighted. A pink arrow points to the 'Actions' dropdown menu next to his name. The table shows 10 contacts, and the footer indicates 'Showing 1 to 10 of 13,020 entries' with pagination controls.

Assigned	Harness	Name	Home Address 1	Email	Phone (Mobile)	Tags
Don Chilton	Vendor	Eric Weiss		EricWeiss@wellstango.com	M (813) 477-40129	Lender
Don Chilton	Vendor	John Gones		gonosj@atlanticcoastbank.net	M (727) 277-2111	Lender
Don Chilton	Vendor	Justin Kelly		jkelly@vandykumortgage.com	M (727) 239-5152	Lender
Don Chilton	Vendor	Jan Vella		jvella@mcfarlandgouldlaw.com	M (727) 461-1111	Title Co.
Don Chilton	Influential Non-Mailing	Ian Larson		ilarson@mdmhotels.com		Influential
Don Chilton	Lead	Laura Belleair Bluffs			M (727) 589-6278	Referral
Don Chilton	Lead	Rankin Becher			M (727) 642-1378	Future Seller
Don Chilton	Influential Non-Mailing	Mary Kropp		mekropp504@aol.com	M (210) 476-1035	Future Buyer
Don Chilton	Influential Non-Mailing	Bruce Bokor		lovegators@aol.com	M (727) 424-5257	Past Seller, 2018 Client
Don Chilton	Influential Non-Mailing	Joe Lantrip		joe.lantrip@gmail.com	M (314) 715-4010	Future Buyer, Investor, fall back post card

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”.

The screenshot displays a CRM interface with a top navigation bar containing 'Filter Contacts', 'Add New Contact', 'Saved Filters', 'Bulk Actions', 'LionDesk Power Dialer', and 'Import'. Below this is a section for 'Columns' (set to 10) and 'Contacts'. The main area shows a list of contacts with columns for checkboxes, a person icon, 'Actions', 'Assigned', 'Hotness', and 'Name'. An 'Actions' dropdown menu is open, listing: 'Edit Contact', 'Add Activity', 'Add Task', 'Add Drip Campaign', 'Add To List', 'Send Direct Mail', 'Manage DotLoops', 'Merge Contact', and 'Delete Contact'. The contact list includes names like Eric Weiss, John Gonos, Justin Kelly, Jan Vella, Ian Larson, Laura Belleair Bluffs, Rankin Becher, Mary Kropp, Bruce Bokor, and Joe Lantrip, with some marked as 'Influential Non-Mailing'. The bottom status bar indicates 'Showing 1 to 10 of 13,020 entries'.

	Assigned	Hotness	Name
<input type="checkbox"/>			Eric Weiss
<input type="checkbox"/>			John Gonos
<input type="checkbox"/>			Justin Kelly
<input type="checkbox"/>			Jan Vella
<input type="checkbox"/>			Ian Larson
<input type="checkbox"/>			Laura Belleair Bluffs
<input type="checkbox"/>			Rankin Becher
<input type="checkbox"/>	Don Chilton	Influential Non-Mailing	Mary Kropp
<input type="checkbox"/>	Don Chilton	Influential Non-Mailing	Bruce Bokor
<input type="checkbox"/>	Don Chilton	Influential Non-Mailing	Joe Lantrip

Showing 1 to 10 of 13,020 entries

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”.

Editing Contact: Eric Weiss

Personal Information

Eric Weiss

Email Address

Mobile Number

Home Number

Office Number

Birthday (mm/dd/yyyy)

Company

[Add/Edit Addresses](#)

Spouse Information

Spouse Name

Spouse Email

Spouse Birthday (mm/dd/yyyy)

Spouse Phone

Organize By:

No Hotness

Select Tags...

Enter new tags here ...

Select Lead Source...

Non-Client

Select Contact Type...

Select Contact Lists...

Don Chilton

Comments:

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”.

The screenshot shows a web application interface for adding a new activity. A blue modal window titled "Add New Activity" is centered on the screen. Inside the modal, there is a "Type:" label with a dropdown menu open, showing a list of activity types: "Comment" (selected with a checkmark), "Email Sent", "Text Message Sent", "Outbound Call Made", "Inbound Call Received", "Sent Letter", and "Sent Post Card". Below the dropdown is a large text input area for the note. At the bottom of the modal is a blue button labeled "Add To Activity Log". Three pink arrows point from the instructional text on the left to the form elements: the first arrow points to the "Type:" dropdown, the second arrow points to the text input area, and the third arrow points to the "Add To Activity Log" button. The background of the application is dark grey with some text visible, including "Non-" and "Laura Belleair Blum".

is ▼

is ▼

om

nk.net

.com

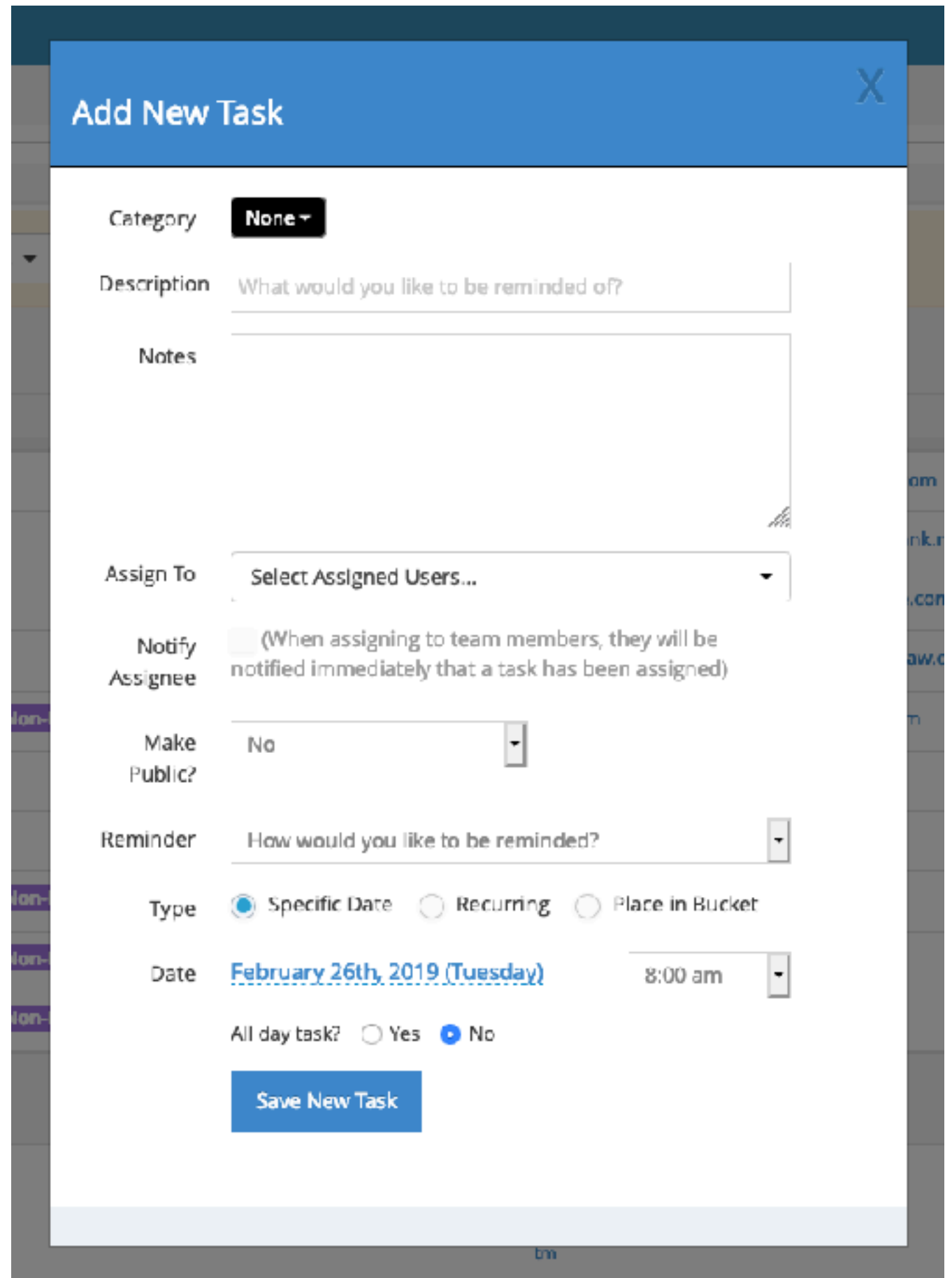
aw.com

Non-

Laura Belleair Blum

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.*



The screenshot shows a 'Add New Task' modal window with a blue header and a close button (X) in the top right corner. The form contains the following fields and options:

- Category:** A dropdown menu currently set to 'None'.
- Description:** A text input field with the placeholder text 'What would you like to be reminded of?'.
- Notes:** A larger text area for additional notes.
- Assign To:** A dropdown menu labeled 'Select Assigned Users...'.
- Notify Assignee:** A checkbox with the text '(When assigning to team members, they will be notified immediately that a task has been assigned)'.
- Make Public?:** A dropdown menu currently set to 'No'.
- Reminder:** A dropdown menu labeled 'How would you like to be reminded?'.
- Type:** Three radio button options: 'Specific Date' (selected), 'Recurring', and 'Place in Bucket'.
- Date:** A date and time selector showing 'February 26th, 2019 (Tuesday)' and '8:00 am'.
- All day task?:** Two radio button options: 'Yes' and 'No' (selected).
- Save New Task:** A blue button at the bottom of the form.

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.

The screenshot displays the LionDesk Power Dialer interface. At the top, there are buttons for 'Add New Contact', 'Saved Filters', 'Bulk Actions', and 'LionDesk Power Dialer'. The 'Bulk Actions' button is highlighted with a red arrow. Below the buttons, there is a 'Columns' dropdown set to '10' and a 'Contacts' dropdown. The main table lists contacts with columns for selection, actions, name, and hotness. The first two contacts are checked. The 'Bulk Actions' dropdown menu is open, showing options like 'Email Contacts', 'Text Contacts', 'Direct Mail Contacts', 'Add Activity', 'Add Task', 'Add Drip Campaign', 'Add To List', 'Add Tags', 'Modify Hotness', 'Modify Status', 'Modify Source', 'Modify Type', 'Modify Assigned User', 'Merge', 'Export', 'Shipping Labels', and 'Delete'. The 'Email' column is visible on the right side of the table.

	Columns	10	Contacts
<input type="checkbox"/>	Contacts (13021)	Owner	Hotness
<input checked="" type="checkbox"/>		Actions ▾	Martha Thorn
<input checked="" type="checkbox"/>		Actions ▾	Martha Thorn
<input type="checkbox"/>		Actions ▾	Martha Thorn Contact
<input checked="" type="checkbox"/>		Actions ▾	Martha Thorn Contact
<input type="checkbox"/>		Actions ▾	Martha Thorn Contact
<input checked="" type="checkbox"/>		Actions ▾	Martha Thorn Contact
<input type="checkbox"/>		Actions ▾	Martha Thorn Contact
<input type="checkbox"/>		Actions ▾	Martha Contact Lisa Fogarty



SECTION FOUR:

The Lion Desk App

Questions

Questions