



LION DESK

The New Home of The Thorn Collection

LION DESK

THE NEW HOME OF THE THORN COLLECTION

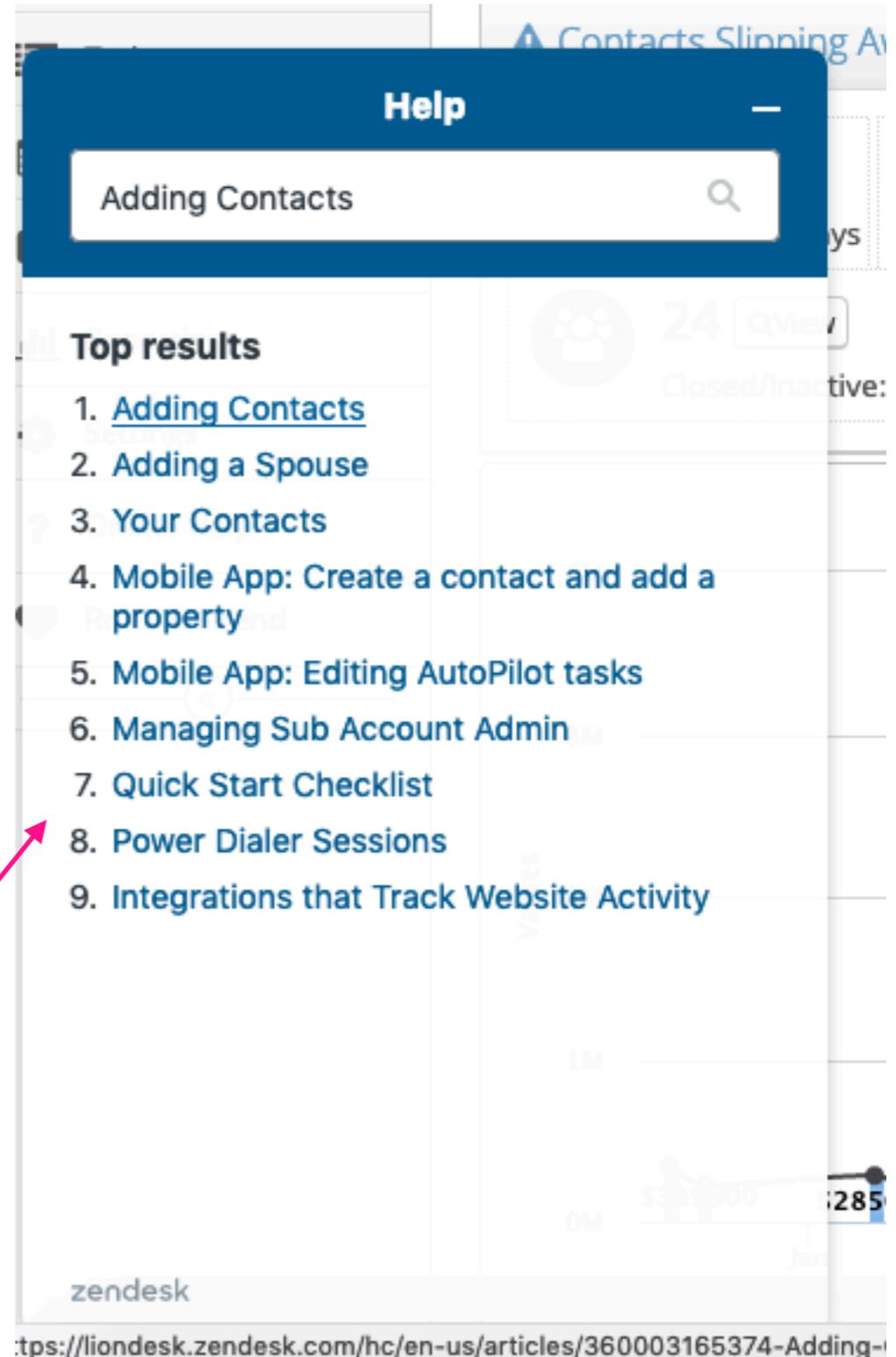
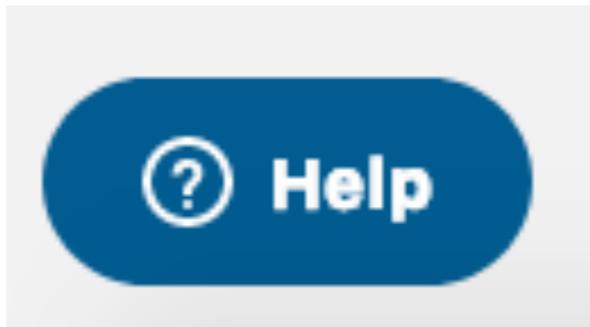
Section One: Profiles

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.

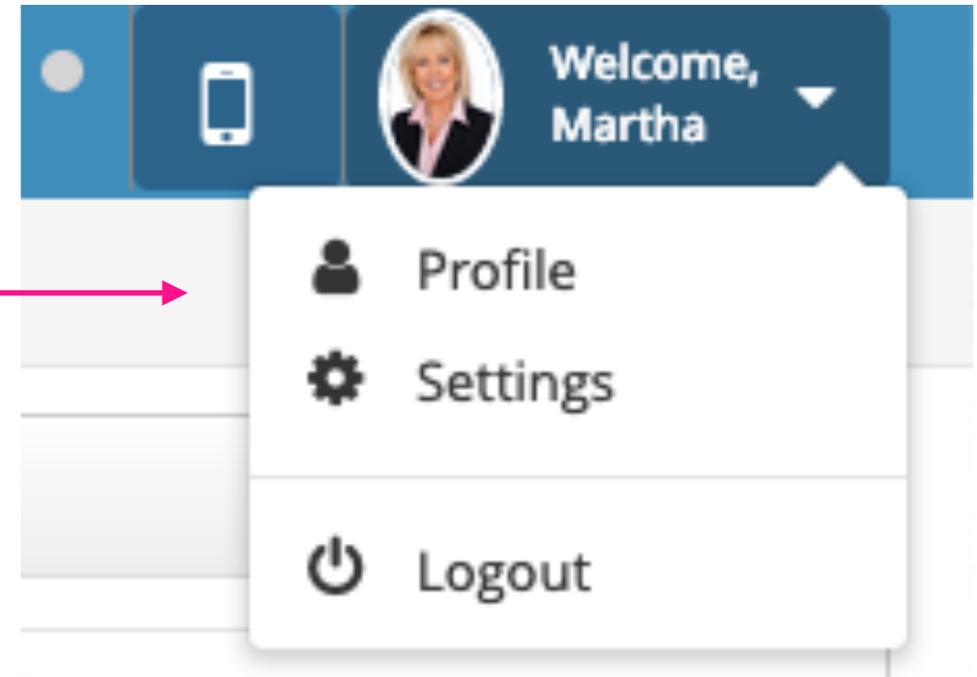
On the right hand side, you can access your Profile and Settings.

The screenshot displays the LionDesk dashboard. On the left, a navigation menu includes: Dashboard, Contacts, Properties, Desk, Marketing, Communications, Tasks, Calendar, Documents, Reporting, Settings, Online Help, and Refer A Friend. The main dashboard area shows 'Daily vitals' with eight circular gauges: New Contacts (1), Outbound Calls (0), Outbound Texts (0), Inbound Texts (0), Emails Sent (0), Emails Opened (0), Emails Clicked (0), and Email Reputation (100.00). Below this is a 'Contacts Slipping Away' section with four categories: New (> 5 Days) with 1 contact, Prospecting (> 30 Days) with 3 contacts, Active (> 7 Days) with 3 contacts, and Future (> 90 Days) with 4 contacts. A 'Closed/Inactive (> 180 Days)' category has 24 contacts. A 'SAMPLE DATA: Deal Pipeline Revenue' line chart shows revenue from Feb to Oct, with peaks in Jul (\$15670) and Sep (\$25730). On the right, a 'Current Tasks Due' table lists tasks with due dates, assignees (Martha Thorn), and descriptions. A 'Recent Contact Activity' section is partially visible at the bottom.

| Due Date | Assigned | Description | Contact |
|-------------------|--------------|---|------------------|
| 2/26/2019 8:00 AM | Martha Thorn | Delete or Assign for follow up? | anna |
| 2/26/2019 8:00 AM | Martha Thorn | Delete or reassign for follow up? | ava |
| 2/26/2019 8:00 AM | Martha Thorn | Delete or reassign for follow up? Notes: Alison had a listing on Arbonet.com. | Christine Baglio |
| 2/26/2019 8:00 AM | Martha Thorn | Delete or reassign for follow up? | Michael Beallie |
| 2/26/2019 8:00 AM | Martha Thorn | Add to influential? Notes: Contact is not on an Influential but is in Donna's form. Should Leslie add to influential since she has so much contact information | Toni Behr |

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 breadcrumb trail "Home > User Settings" and a search bar. Below the breadcrumb, it says "User > Edit Profile". On the left, there is a profile picture of Martha Thorn. To the right of the picture, there are several 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), and Alerts (Send me my LionDesk daily activity email: No). Below these fields, there are sections for "Introduction" and "Email Signature", each with an "Edit" button. The "Introduction" section contains a paragraph about Martha Thorn's real estate business. The "Email Signature" section contains a signature block for Martha Thorn, CEO of The Thorn Collection. On the left side of the page, there are three sections: "LionDesk Contacts" with buttons for "Import New Contacts", "Export LionDesk Contacts", and "Find Duplicate Contacts"; "Google Sign-In" with a "Sign In With Google" button; and "Subscriptions & Limits". A red arrow points from the text "Your profile will then appear." to the profile picture.

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 | <input type="text" value="954-210-5188"/> 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. |
| 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 |

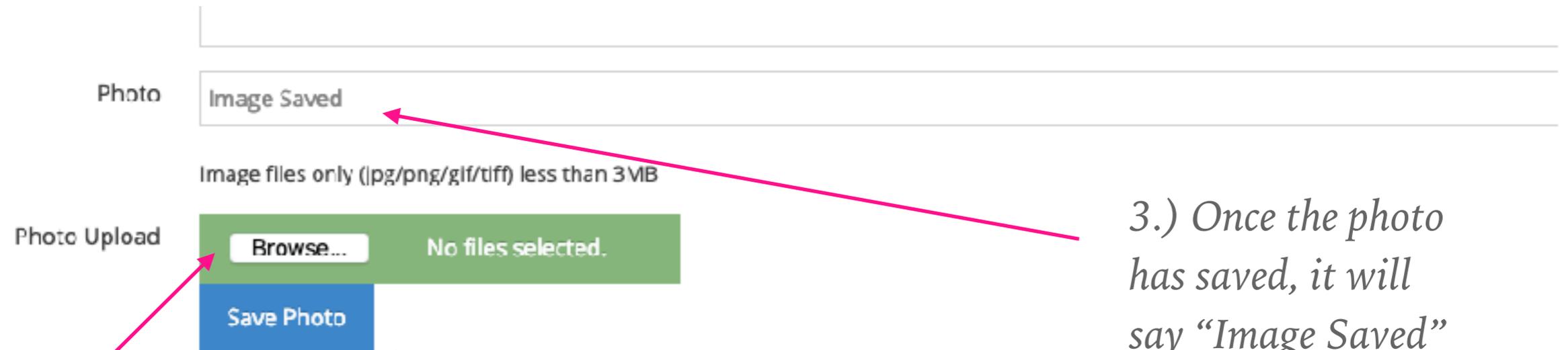
2.) Input your phone number and click on the blue check box that appears.

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



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 

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 Saved

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

Photo Upload

 No files selected.



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

The screenshot shows a web editor interface. On the left, there are settings for 'Time Zone' (America - Eastern), 'Texting Times', and 'Alerts'. Below these is a 'Save Introduction' button with a checkmark. The main editing area features a rich text editor toolbar with options for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, and video. Below the toolbar, the font is set to 'Georgia', the size is '12', and the text color is a deep blue. The text in the editor reads: '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!

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: 727-400-4970 | 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”.

The screenshot displays the 'Contact Activity Timeline' interface. At the top, there is a blue header with the title 'Contact Activity Timeline' and a funnel icon. Below the header is a navigation bar with tabs for 'All', 'Comments', 'Sent/Rcvd', 'Opened', 'Clicked', and 'Calls'. The 'All' tab is currently selected. Below the navigation bar is a search bar labeled 'Search Activities'. The main content area shows three activity entries, each with a user icon, a description, and a timestamp:

- 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

At the bottom of the interface, there is a red button labeled 'Add New Activity'.

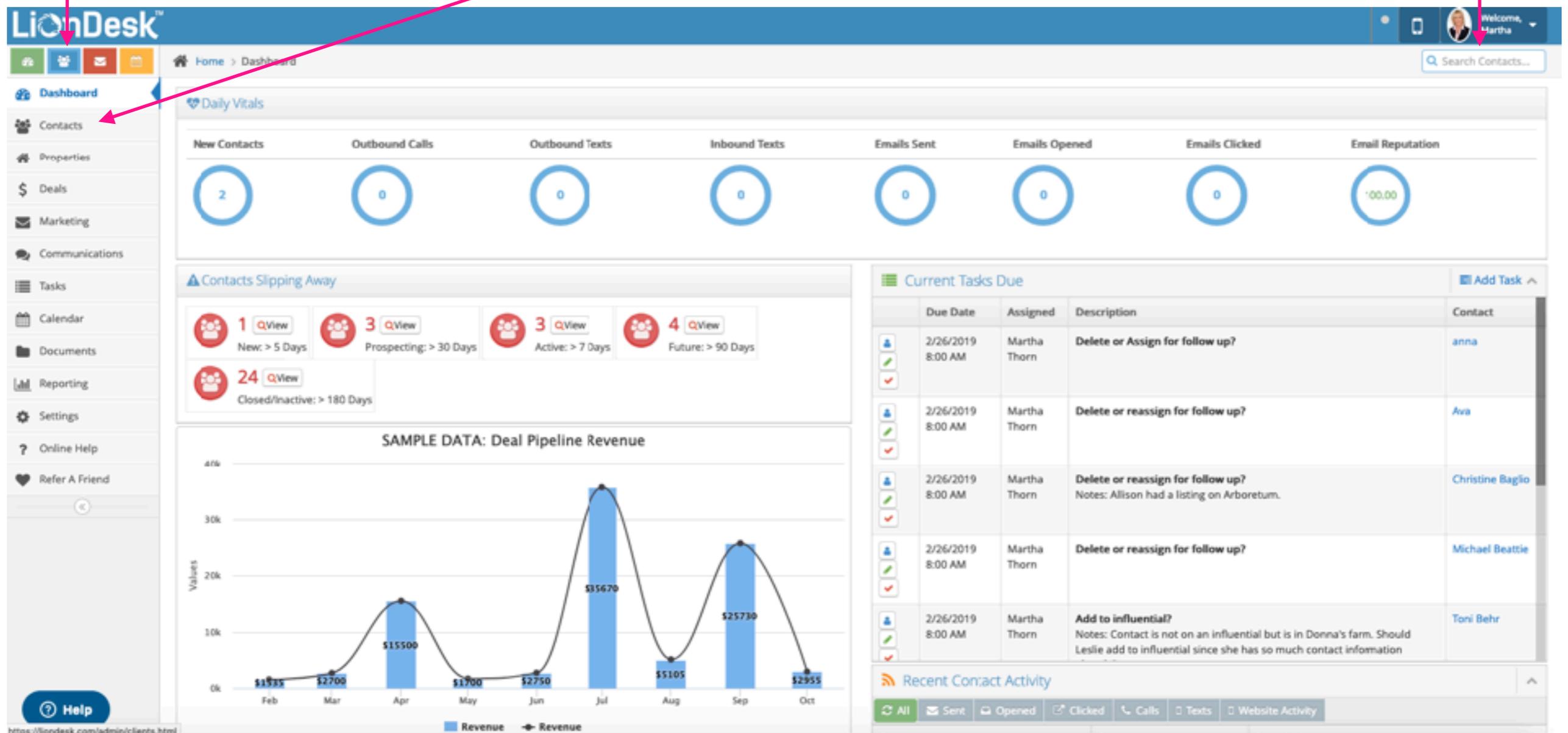
Below is your “Dashboard”. The dashboard is your welcome screen every time you log into Lion Desk. There are 3 ways to access contacts from the dashboard.

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.



Daily Vitals

| Metric | Value |
|------------------|--------|
| New Contacts | 2 |
| Outbound Calls | 0 |
| Outbound Texts | 0 |
| Inbound Texts | 0 |
| Emails Sent | 0 |
| Emails Opened | 0 |
| Emails Clicked | 0 |
| Email Reputation | 100.00 |

Contacts Slipping Away

| Status | Count | Action |
|-----------------------------|-------|--------|
| New: > 5 Days | 1 | View |
| Prospecting: > 30 Days | 3 | View |
| Active: > 7 Days | 3 | View |
| Future: > 90 Days | 4 | View |
| Closed/Inactive: > 180 Days | 24 | View |

SAMPLE DATA: Deal Pipeline Revenue

| Month | Revenue |
|-------|---------|
| Feb | \$1533 |
| Mar | \$2700 |
| Apr | \$15500 |
| May | \$1700 |
| Jun | \$2750 |
| Jul | \$35670 |
| Aug | \$5105 |
| Sep | \$25730 |
| Oct | \$2955 |

Current Tasks Due

| Due Date | Assigned | Description | Contact |
|-------------------|--------------|---|------------------|
| 2/26/2019 8:00 AM | Martha Thorn | Delete or Assign for follow up? | anna |
| 2/26/2019 8:00 AM | Martha Thorn | Delete or reassign for follow up? | Ava |
| 2/26/2019 8:00 AM | Martha Thorn | Delete or reassign for follow up? Notes: Allison had a listing on Arboretum. | Christine Baglio |
| 2/26/2019 8:00 AM | Martha Thorn | Delete or reassign for follow up? | Michael Beattie |
| 2/26/2019 8:00 AM | Martha Thorn | Add to influential? Notes: Contact is not on an influential but is in Donna's farm. Should Leslie add to influential since she has so much contact information | Toni Behr |

Recent Contact Activity

Filter: All | Sent | Opened | Clicked | Calls | Texts | Website Activity

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 interface for the 'Contacts' page. The top navigation bar includes the LionDesk logo, a home icon, and a search bar for contacts. A sidebar on the left lists various application features like Dashboard, Properties, Deals, Marketing, and Reporting. The main content area features a 'Filter Contacts' dropdown, a 'YES' toggle for 'Include team members contacts', and several action buttons: 'Add New Contact', 'Saved Filters', 'Bulk Actions', 'LionDesk Power Dialer', and 'Import Contacts'. Below these is a search bar for the current contact list and a 'Columns' selector set to 10. The contact list is a table with columns for selection, actions, owner, hotness, name, email, phone, tags, status, source, last comment, next task, and created date. The table contains 10 rows of contact data.

| | | Owner | Hotness | Name | Email | Phone (Mobile) | Tags | Status | Source | Last Comment | Next Task | Created |
|--------------------------|---------|--------------|-------------------------|------------------|------------------------------|------------------|---|-----------------|------------------------|--------------|-----------|------------|
| <input type="checkbox"/> | Actions | Martha Thorn | Influential | Don Chilton | dncchilton@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 | jtdeedrick@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 | Martin Bergh | oldinen@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 | Anur Banerjee | anuruddhaabanerjee@gmail.com | M (607) 726-1222 | 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 | Johr Gonos | gonosj@atlanticcoastbank.net | M (777) 777-2051 | 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 |

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 CRM interface for a contact named Don Chilton. The top navigation bar includes tabs for Profile, Marketing, Documents, Properties, Leads, Timeline, and Gmail. Below this, a secondary navigation bar contains various action buttons such as 'Fail Contact', 'Add Activity', 'Add Task', 'Start Campaign', 'Add Deal', 'Add To List', 'Merge', and 'Cloud CRM'. The main profile area is divided into two panes. The left pane, titled 'Don Chilton', lists contact details: email (donchilton@gmail.com), secondary email (cc@contacts.liondesk.com), mobile phone (727) 415-3515, home phone, office phone, address (330 Promenade Dr., Unit 103 Dunedin, FL 34698), birthday (10/02/1988), anniversary, company (Coldwell Banker), TAGS, spouse info, custom fields (Contact Notes, Letter Salutation, Owner Occupied), status (Prospecting), source (Friend/Family Referral), owner (Martha Thorne), and account info (Don Chilton). The right pane, titled 'Contact Activity Timeline', shows a recent activity: 'Martha Thorne: Called to follow up on listing appointment.' on 2/26/2019 8:39 PM. Below the timeline is an 'Add New Activity' button and an 'Associated Parties' section listing 'Your Lender (Sample)' and 'Your Escrow Rep. (Sample)'. A red arrow points to the top navigation bar, and another red arrow points to edit and delete icons in the custom fields section.

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 displays the LionDesk CRM interface. The top navigation bar includes the LionDesk logo, a home icon, and a search bar. The left sidebar contains various navigation options. The main content area is titled 'Contacts' and features a 'Filter Contacts' dropdown, a 'YES' toggle for 'Include team members contacts', and several action buttons: 'Add New Contact', 'Saved Filters', 'Bulk Actions', 'LionDesk Power Dialer', and 'Import Contacts'. Below these buttons is a 'Columns' dropdown menu set to '10' and a search bar for the contacts. The contact list table has the following columns: Owner, Hotness, Name, Email, Phone (Mobile), Tags, Status, Source, Last Comment, Next Task, and Created. A red arrow points from the bottom of the page 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 | 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 | jtdeedrick@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 |
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| Martha Thorn | Influential Non-Mailing | Tu Tran | ttr3085@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 | 11/23/2017 | | 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 Gonox | gonoxj@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 |

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 X

Personal Information

* First Name Last Name

Email Address

Mobile Number

Home Number

Office Number

Birthday (mm/dd/yyyy) 

Company

*

Spouse Information

Spouse Name

Spouse Email

Spouse Birthday (mm/dd/yyyy) 

Spouse Phone

*

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.

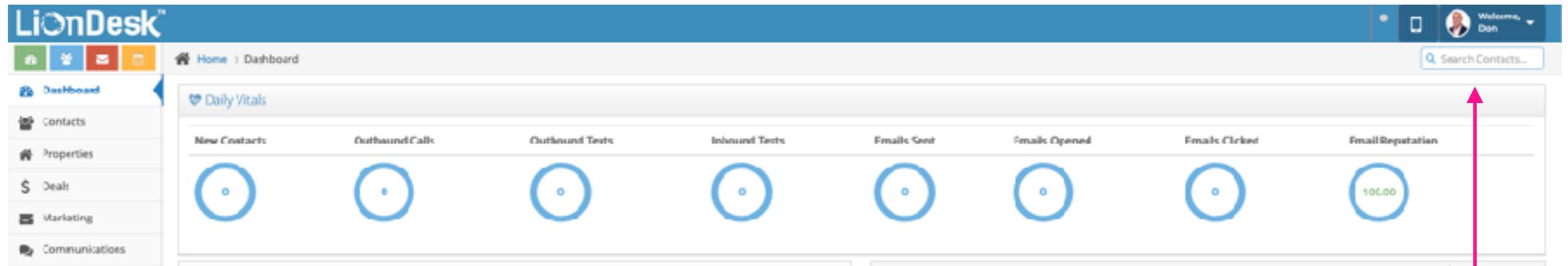
If you have a property address for the contact, search that address to see if it is on someones farm. If the contact is on someones form, submit the Thorn Portal “New Contact Lead” form and select that agent. They will then have 24 hours to respond.

SECTION THREE:

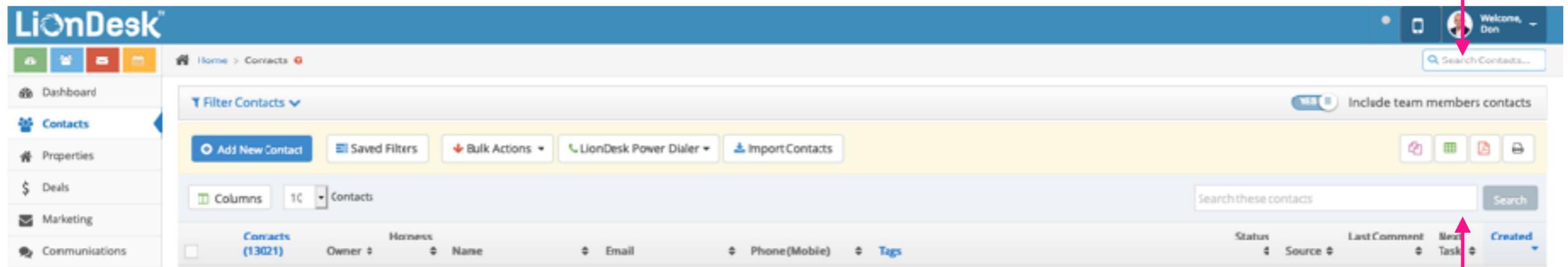
Searching Contacts
Quick Edits



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.

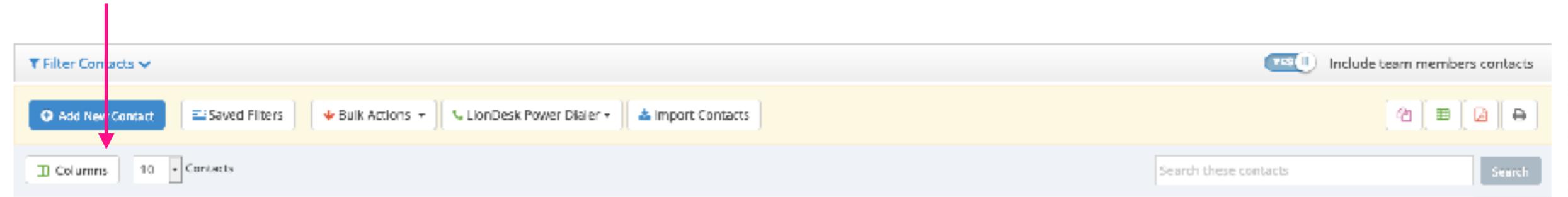
1.) To search for specific contacts, you can select “Filter Contacts” where a drop down will appear that gives you various search options.

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

The screenshot shows the LionDesk interface for the Contacts Preview Page. The sidebar on the left contains navigation options: Dashboard, Contacts, Properties, Deals, Marketing, Communications, Tasks, Calendar, Documents, Reporting, Settings, Online Help, and Refer A Friend. The main content area features a 'Filter Contacts' dropdown menu, a search bar, and a table of contacts. The table has columns for Owner, Hotness, Name, Email, Phone (Mobile), Tags, Status, Source, Last Comment, Next Task, and Created. A toggle for 'Include team members contacts' is located at the top right of the table area.

| 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 | 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 | jdedrick@me.com | M (813) 415-6933 | Future Seller, Past Buyer, Rental | 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@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 | tmt3085@gmail.com | M (617) 771-2118 | Future Seller, Past Buyer | Closed/Inactive | | 11/24/2017 | | 11/20/2017 |
| Martha Thorn | Influential | Anurudh Banerjee | anurudhbanerjee@gmail.com | M (607) 724-1222 | 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) 777-2051 | 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 |

Adjusting Your View

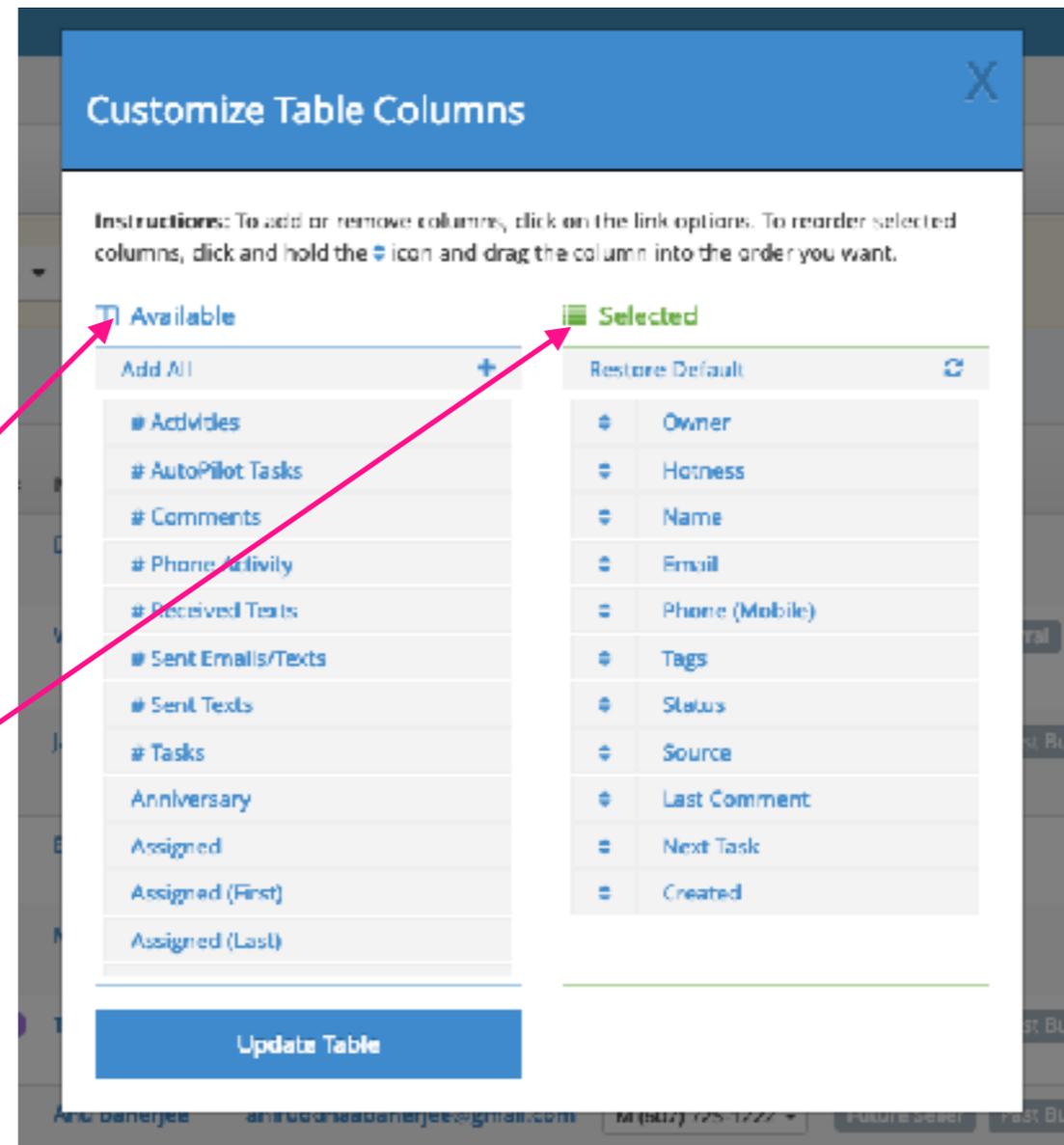


1.) When you click “Columns”, you then have the option to select the different columns that you can see. Everyone will be different, there is no right or wrong way to view your contacts.

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.

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

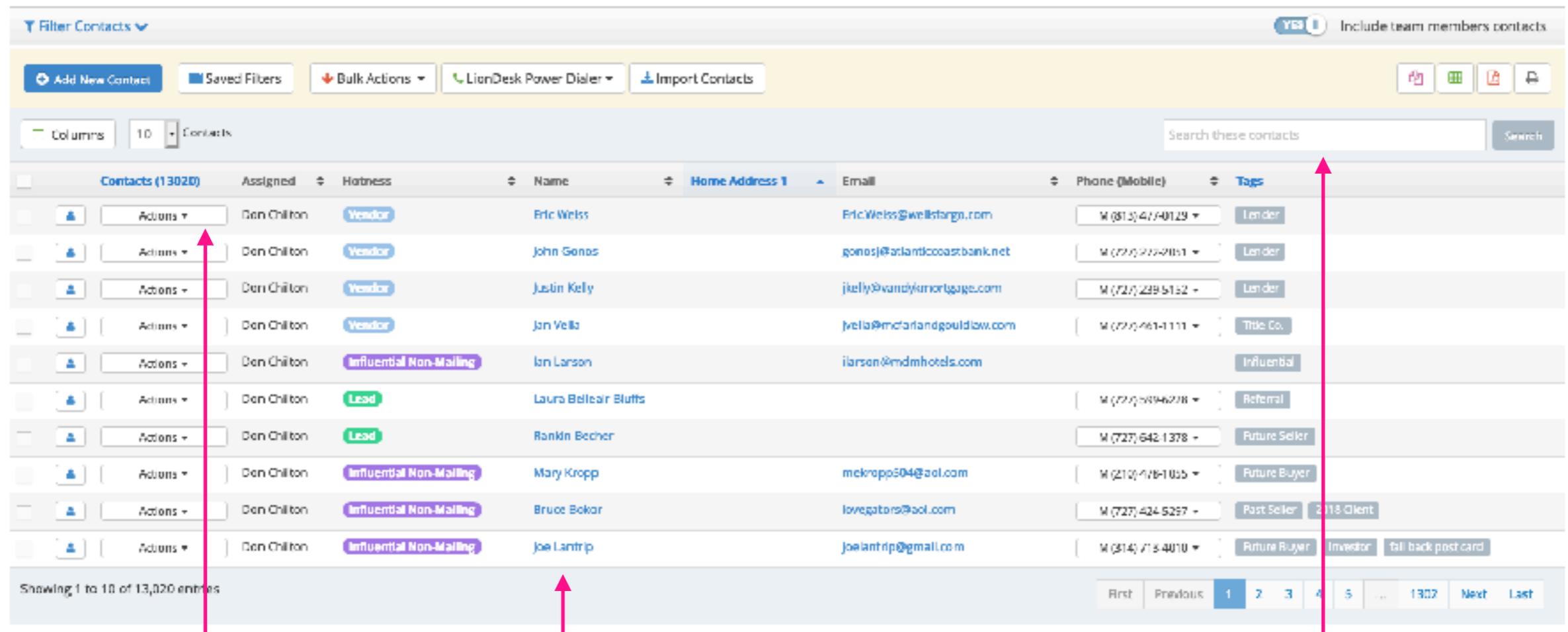
Restore Default ↻

- Assigned
- Hotness
- Name
- Home Address 1
- Email
- Phone (Mobile)
- Tags

Update Table

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.



The screenshot shows a CRM interface for managing contacts. At the top, there are 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. Below the search bar is a table of contacts with columns: 'Assigned', 'Hortness', 'Name', 'Home Address 1', 'Email', 'Phone (Mobile)', and 'Tags'. The table lists 10 contacts, each with an 'Actions' dropdown menu next to the name. A red arrow points to the 'Actions' menu for the first contact, Eric Weiss. Another red arrow points to the search bar. A third red arrow points to the 'Name' column header. At the bottom, there is a pagination bar showing 'Showing 1 to 10 of 13,020 entries' and navigation buttons for 'First', 'Previous', '1', '2', '3', '4', '5', '1302', 'Next', and 'Last'.

| Assigned | Hortness | Name | Home Address 1 | Email | Phone (Mobile) | Tags |
|-------------|-------------------------|-----------------------|----------------|------------------------------|------------------|---|
| Den Chilton | Vendor | Eric Weiss | | Eric.Weiss@wellstargo.com | M (813) 477-9029 | Lender |
| Den Chilton | Vendor | John Gones | | gonosj@atlanticoastbank.net | M (772) 277-9151 | Lender |
| Den Chilton | Vendor | Justin Kelly | | jkelly@vandykermortgage.com | M (727) 229-5152 | Lender |
| Den Chilton | Vendor | Jan Vella | | jvella@mcfarlandgouldlaw.com | M (772) 461-1111 | Title Co. |
| Den Chilton | Influential Non-Mailing | Ian Larson | | ilarson@mdmhotels.com | | Influential |
| Den Chilton | Lead | Laura Belleair Bluffs | | | M (772) 639-6278 | Referral |
| Den Chilton | Lead | Ranin Becher | | | M (727) 642-1378 | Future Seller |
| Den Chilton | Influential Non-Mailing | Mary Kropp | | mekropp504@aol.com | M (210) 478-1035 | Future Buyer |
| Den Chilton | Influential Non-Mailing | Bruce Bokor | | lovegators@aol.com | M (727) 424-5257 | Past Seller 2118 Client |
| Den Chilton | Influential Non-Mailing | Joe Lantrip | | joelantrip@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.

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 for 'Include team members contacts' set to 'YES'. The main area contains several filter categories: 'Contacts with no active campaign' (OFF), 'Contacts with no future task' (OFF), 'Hotness' (dropdown menu), 'Include All Tags' (OFF), 'Search Phrase' (text input), and 'Other Contact Dates' (dropdown menu). The right side has dropdown menus for 'Contact Source', 'Contact Status', 'Contact Type', 'Contact List/Bucket', and 'Assigned To'. At the bottom, there are buttons for 'Apply Filters', 'Create New Saved Filter', and 'Reset Filters'. Two red arrows point from the text below to the 'Include team members contacts' toggle and the 'Apply Filters' button.

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

Filter Contacts YES Include team members contacts

OFF Contacts with no active campaign

OFF Contacts with no future book

Hotness
Select Hotness ...

OFF Include All Tags
Select a Tag...

Search Phrase
Enter word or phrase ...
 Any All Exact

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 -
after = before

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...

View IDX Filters

Apply Filters Create New Saved Filter Reset Filters

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 left, there's a 'Filter Contacts' header with a dropdown arrow. On the top right, there's a toggle for 'Include team members contacts' set to 'YES'. The main area is divided into several sections:

- Left Column:** Includes toggle switches for 'Contacts with no active campaign' and 'Contacts with no future task', both currently 'OFF'. Below these are dropdown menus for 'Hotness' and 'Include All Tags'. A 'Search Phrase' input field is present, along with radio buttons for 'Any', 'All', and 'Exact'.
- Middle Column:** Contains numerical and date filters: 'Last Email/Text Sent' (with 'after' and 'before' options), '# of Times Emailed/Texted' (with 'min' and 'max' inputs), 'Last Commented' (with 'after' and 'before' options), '# of Times Commented' (with 'min' and 'max' inputs), '# of Text Replies From Contact' (with 'min' and 'max' inputs), '# of Texts Sent To Contact' (with 'min' and 'max' inputs), and 'Other Contact Dates' (with a date selector and 'after'/'before' options).
- Right Column:** Features dropdown menus for 'Contact Source', 'Contact Status', 'Contact Type', 'Contact List/Bucket', and 'Assigned To'.

At the bottom of the interface, there are three buttons: 'Apply Filters', 'Create New Saved Filter', and 'Reset Filters'. A red arrow points to the 'Create New Saved Filter' button.

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

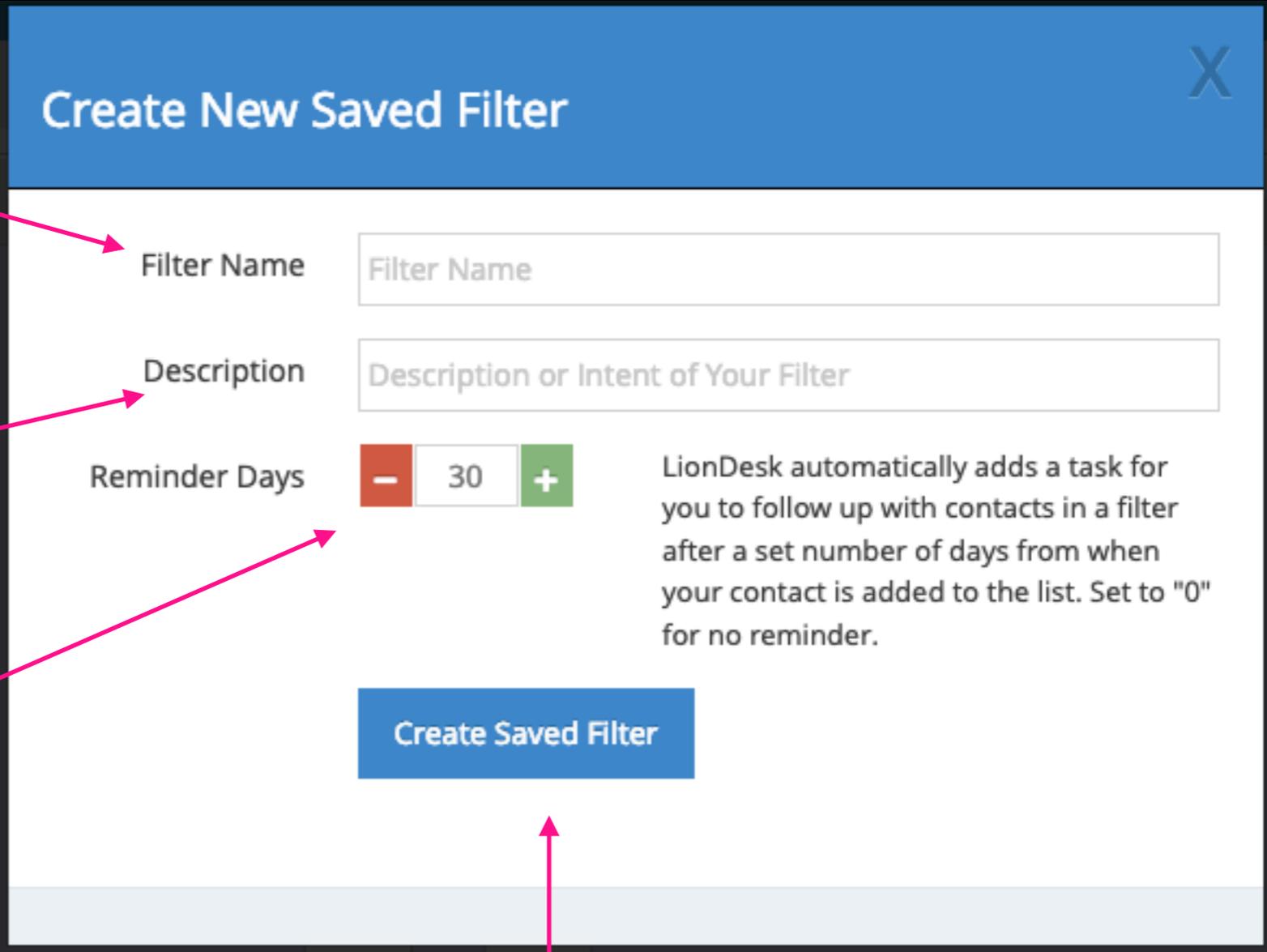
Saved Filters

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.



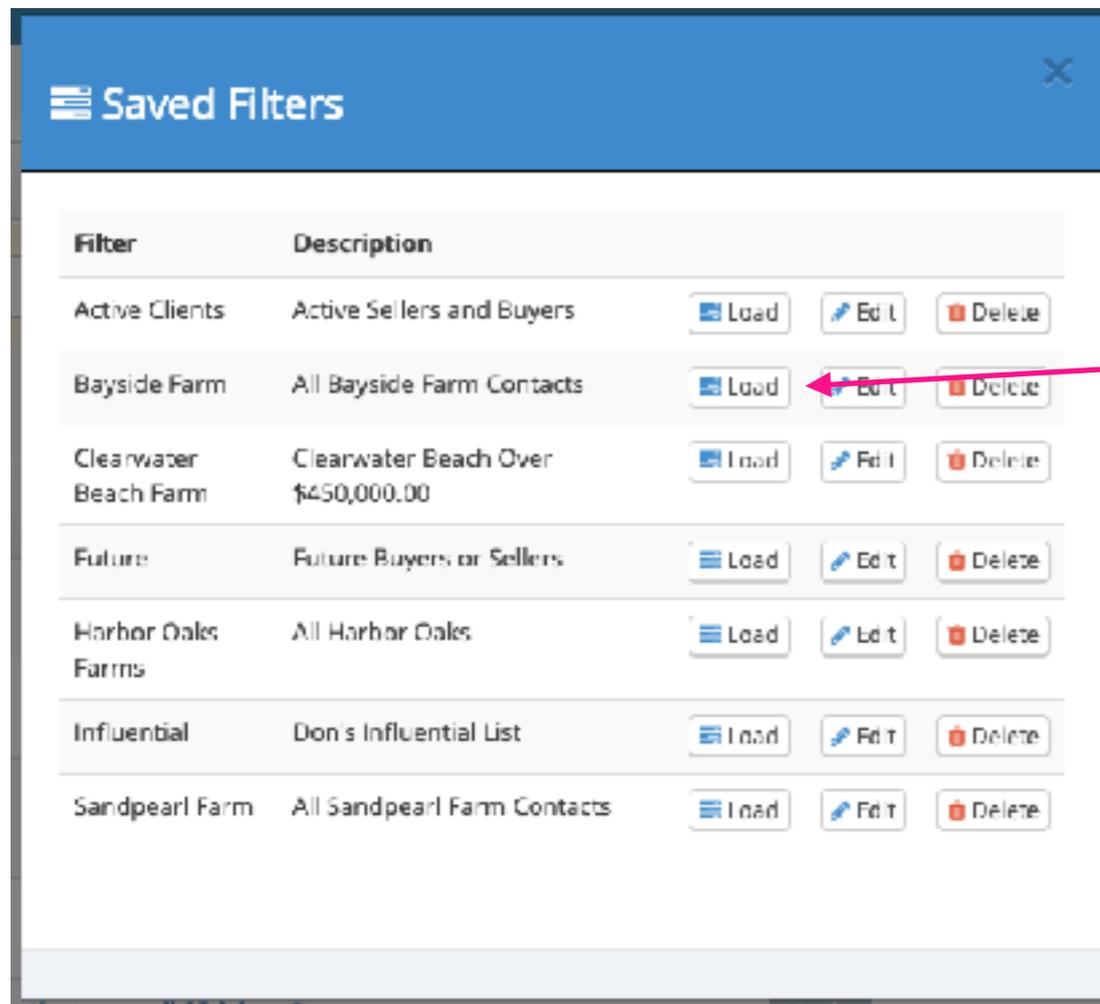
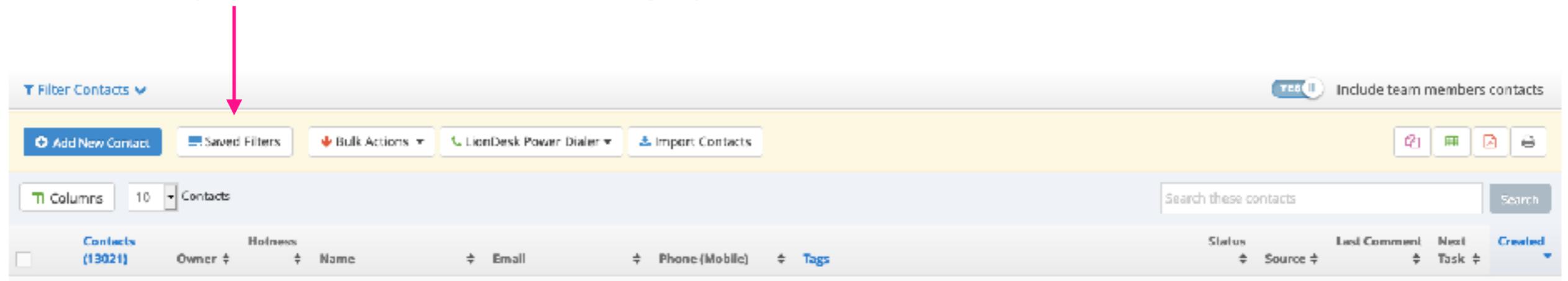
The screenshot shows a form titled "Create New Saved Filter" with a blue header and a close button (X) in the top right corner. The form contains the following fields and controls:

- Filter Name:** A text input field with the placeholder text "Filter Name". A red arrow points to this field from the text on the left.
- Description:** A text input field with the placeholder text "Description or Intent of Your Filter". A red arrow points to this field from the text on the left.
- Reminder Days:** A numeric input field with a red minus button on the left, the number "30" in the center, and a green plus button on the right. A red arrow points to this field from the text on the left.
- Help Text:** To the right of the Reminder Days field, there is a paragraph: "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:** A blue button with white text, located at the bottom center of the form. A red arrow points to this button from the text below the screenshot.

Click "Create Saved Filter"

Saved Filters

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



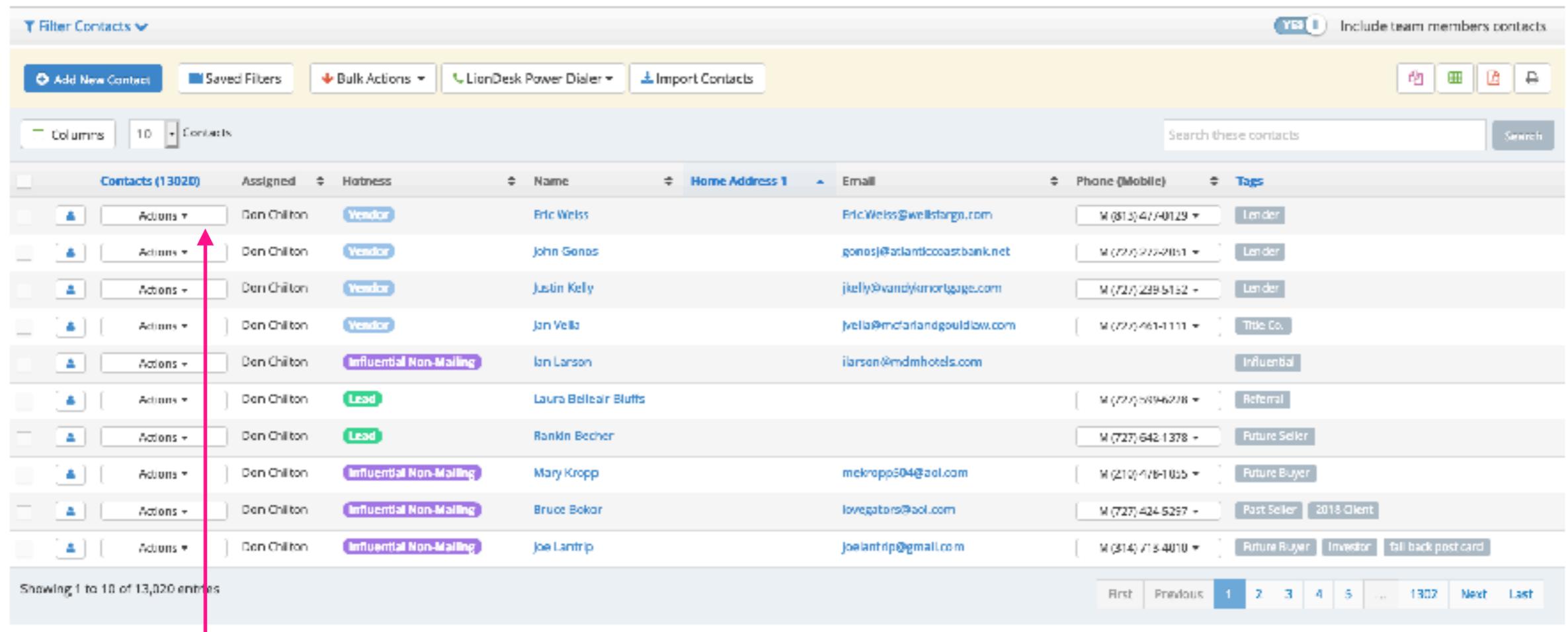
Your saved filters will appear!

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 displays the Lion Desk interface for managing contacts. At the top, there are navigation buttons: 'Add New Contact', 'Saved Filters', 'Bulk Actions', 'LionDesk Power Dialer', and 'Import Contacts'. A search bar is located on the right. Below the navigation is a table of contacts. The table has columns for 'Assigned', 'Hortness', 'Name', 'Home Address 1', 'Email', 'Phone (Mobile)', and 'Tags'. A red arrow points to the 'Actions' dropdown menu for the first contact, Eric Weiss. The table shows 10 contacts, with the first one being Eric Weiss, a Vendor, with email Eric.Weiss@wellstargo.com and phone M (813) 477-90129. Other contacts include John Gonos, Justin Kelly, Jan Vella, Ian Larson, Laura Belleair Bluffs, Rankin Becher, Mary Kropp, Bruce Bokor, and Joe Lantrip, each with various tags like 'Lead', 'Influential Non-Mailing', 'Future Buyer', and 'Past Seller'.

| Assigned | Hortness | Name | Home Address 1 | Email | Phone (Mobile) | Tags |
|-------------|-------------------------|-----------------------|----------------|------------------------------|-------------------|---|
| Den Chilton | Vendor | Eric Weiss | | Eric.Weiss@wellstargo.com | M (813) 477-90129 | Lender |
| Den Chilton | Vendor | John Gonos | | gonosj@atlanticoastbank.net | M (772) 277-9151 | Lender |
| Den Chilton | Vendor | Justin Kelly | | jkelly@vandykemortgage.com | M (727) 229-5152 | Lender |
| Den Chilton | Vendor | Jan Vella | | jvella@mcfarlandgouldlaw.com | M (772) 461-1111 | Title Co. |
| Den Chilton | Influential Non-Mailing | Ian Larson | | ilarsen@mdmhotels.com | | Influential |
| Den Chilton | Lead | Laura Belleair Bluffs | | | M (772) 639-6278 | Referral |
| Den Chilton | Lead | Rankin Becher | | | M (727) 642-1378 | Future Seller |
| Den Chilton | Influential Non-Mailing | Mary Kropp | | mekropp504@aol.com | M (210) 478-1055 | Future Buyer |
| Den Chilton | Influential Non-Mailing | Bruce Bokor | | lovegators@aol.com | M (727) 424-5257 | Past Seller, 2018 Client |
| Den Chilton | Influential Non-Mailing | Joe Lantrip | | joelantrip@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 for managing contacts. At the top, there is a 'Filter Contacts' dropdown and several action buttons: 'Add New Contact', 'Saved Filters', 'Bulk Actions', 'LionDesk Power Dialer', and 'Import'. Below this, a 'Columns' button and a '10 Contacts' indicator are visible. The main area shows a list of 13,020 contacts. The first few rows are visible, showing columns for 'Assigned', 'Hotness', and 'Name'. An 'Actions' dropdown menu is open over the first contact, listing various actions: '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. The bottom of the screen shows '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”.*

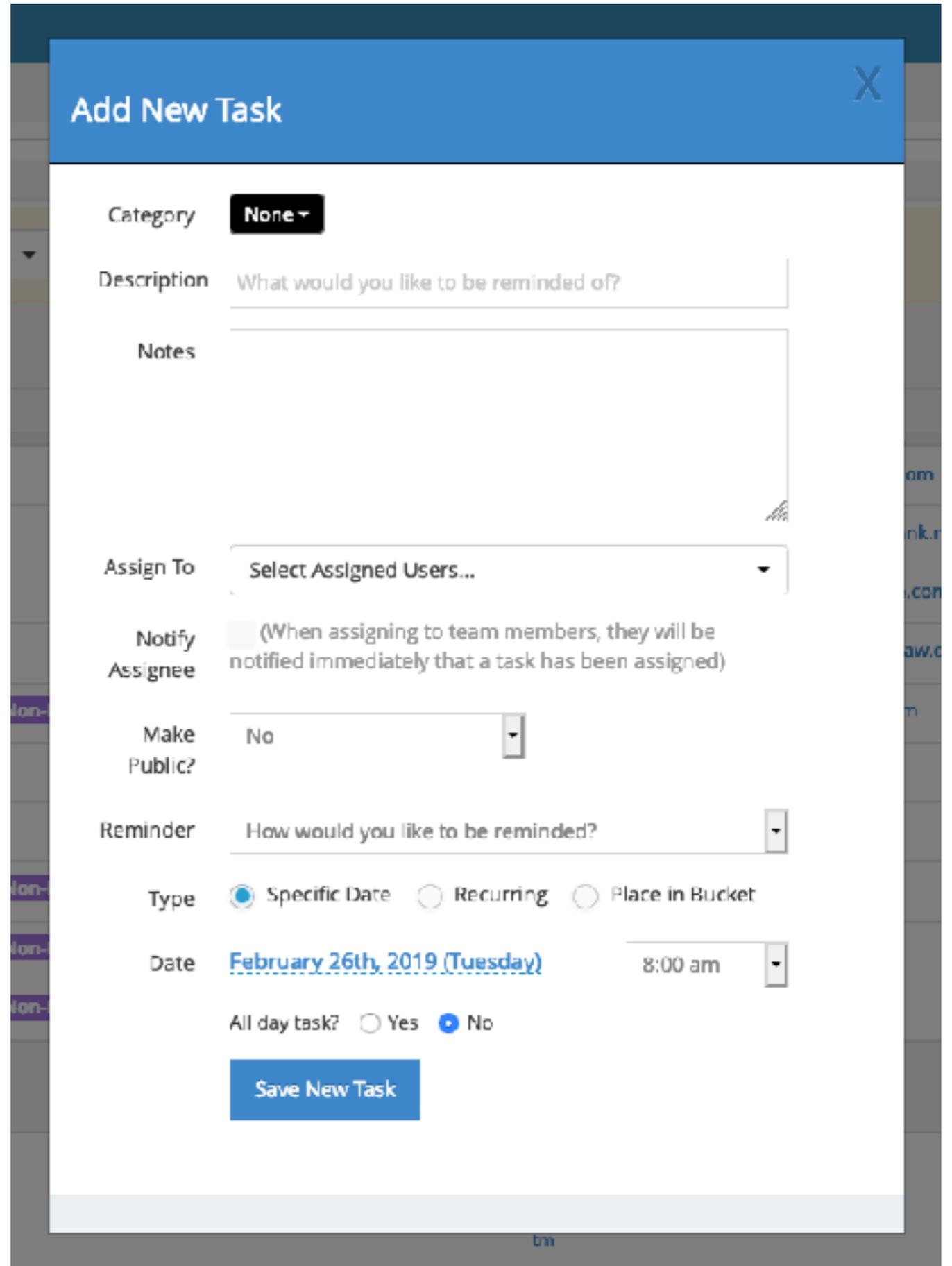
The screenshot shows a modal dialog box titled "Add New Activity" with a close button (X) in the top right corner. The dialog contains the following elements:

- 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".
- A "Note:" label followed by a large, empty text input area.
- A blue button at the bottom labeled "Add To Activity Log".

Three red arrows point from the text instructions on the left to the corresponding UI elements: the first arrow points to the "Type:" dropdown, the second arrow points to the "Note:" text input area, and the third arrow points to the "Add To Activity Log" button.

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' form with the following fields and options:

- Category:** A dropdown menu currently set to 'None'.
- Description:** A text input field containing the placeholder text 'What would you like to be reminded of?'.
- Notes:** A larger text area for additional information.
- Assign To:** A dropdown menu with the placeholder text 'Select Assigned Users...'.
- Notify Assignee:** A checkbox that is currently unchecked, 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 with the placeholder text '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 shows a CRM interface with a list of contacts. At the top, there are buttons for 'Add New Contact', 'Saved Filters', 'Bulk Actions', and 'LionDesk Power Dialer'. Below these, there are 'Columns' and '10' dropdowns. The main table has columns for 'Contacts (13021)', 'Owner', and 'Hotness'. 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'. A pink arrow points from the text 'you can use the “Bulk Actions” tool.' to the 'Bulk Actions' button.

| | Contacts (13021) | Owner | Hotness |
|-------------------------------------|------------------|--------------|---------|
| <input type="checkbox"/> | Martha Thorn | Martha Thorn | |
| <input checked="" type="checkbox"/> | Martha Thorn | Martha Thorn | |
| <input checked="" type="checkbox"/> | Martha Thorn | Martha Thorn | |
| <input type="checkbox"/> | Martha Thorn | Martha Thorn | Contact |
| <input checked="" type="checkbox"/> | Martha Thorn | Martha Thorn | Contact |
| <input type="checkbox"/> | Martha Thorn | Martha Thorn | Contact |
| <input checked="" type="checkbox"/> | Martha Thorn | Martha Thorn | Contact |
| <input type="checkbox"/> | Martha Thorn | Martha Thorn | Contact |
| <input type="checkbox"/> | Martha | Martha | Contact |
| <input type="checkbox"/> | Lisa Fogarty | Lisa Fogarty | |



SECTION FOUR:

The Lion Desk App

Questions

Questions