Leads & Contacts for End Users

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Introduction

Note
This guide is designed to walk end users through the leads and contacts functionality.

The pages in the Leads & Contacts navigation section offer a wide range of product functionality when it comes to interacting with your contacts and leads. The following pages and their associated functions are all incorporated in this navigation section (your exact view may not show all of these options due to your role's permissions):

- Focused View
- Call Queue
- Search Contacts (global search)
- Contacts (list page, including pipeline views)
- Groups
- Leads (list page)
- Lead Management
  - Workflows
  - Lead Settings
  - Lead Routing
  - Action Plans
  - Lead Sources (Contacts)

- Archived Contacts
- Do Not Contact List

User Permissions

Total Expert (TE) features are controlled by permissions that are assigned according to user role. Please reach out to your internal administration team if you have issues accessing any of these features.

Commonly Used Terms

Name	Description
Contact	A record of an individual who has a relationship with a TE user, such as a loan officer.
Lead	A record that represents a specific opportunity for a TE user to provide a product or service to a contact. A single contact may have multiple lead records associated with it.
Focused view	Product feature that allows marketers to use filters to narrow down top revenue-generating contacts and leads. These views can then be used in certain marketing automation flows.
Actions	A process you take with a contact or a lead to accomplish a certain task with that contact or lead.
Groups	Method of combining similar contacts together for organizational purposes. You can also take actions on groups of contacts. The two different kinds of groups are: • Smart groups • Manual groups
Lead routing	A feature that allows you to automatically assign incoming leads to members of your team.
Lead source	Origination source of a contact or lead. Typically used when they come from a third-party service or vendor. These sources are used to automate workflows.
Inclusion and exclusion rules	Filters that allow you to specify criteria to include or exclude certain contacts in your saved lists.
Saved list	A list feature where your filters, sorting, and column setup can be saved, and your list can be reloaded quickly later.
List picker	A tool to easily navigate between different saved lists.
Column picker	The ability to add or remove contact columns for organizational purposes.
Frozen columns	Certain contact field columns that cannot be rearranged.
Bulk actions	The ability to perform an action on more than 1 contact at a time.
Do not contact (DNC)	An action on a contact record that removes it from the list, eliminates all outbound communication to that person, and adds the record to a separate DNC list.

Focused View

This feature gives your marketers the ability to identify top revenue contacts and leads. Please see the Marketing Automation guide for in-depth focused view information.

Contact List

This is the list view of all contacts in your TE account. All actions on these contacts take place on the list page and individual contact records. Examples of the actions you can perform on this list view are:

- Filtering contacts
- Viewing contact details
- Editing contact information
- Adding contacts to journeys
- Sending direct emails
- Sending BombBomb videos
- Adding tasks
- Opting in and out of communication
- Silencing communications
- Sharing contacts
- Archiving contacts
- Deleting contacts
- Moving contacts to the Do Not Contact list

The number of contacts you have is shown in the lower-left corner of the page. If you have more than 25 contacts, the list is broken into multiple pages. Use the pagination controls at the bottom of the page to move among the different pages. Contacts are sorted by the Creation Date field by default, with the newest contacts at the top.

Filters

The contact list offers two filtering options:

- **Inclusion rules** – Criteria you choose that determine which contact records should be shown in your list.
  - A contact record must match all the criteria in your inclusion rules to be listed.
- **Exclusion rules** – Criteria you choose that determine which contact records should be omitted from your list.

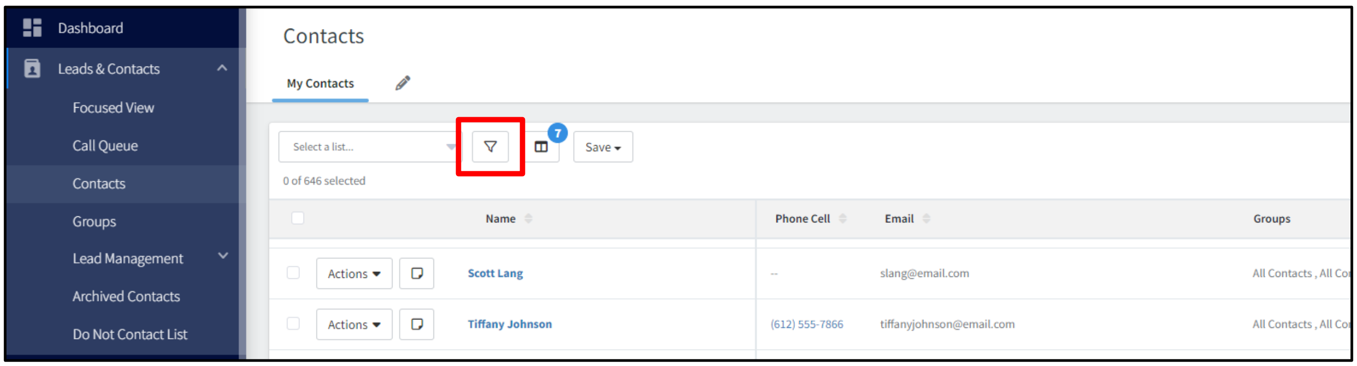
- A contact record that matches *any* exclusion rule will be omitted, even if it matches all the inclusion rules.
- Contact records that do not have a value in a field used in an exclusion rule are not affected and are still shown in the contact list (if it matches the inclusion rules).

How to Use Inclusion Filters

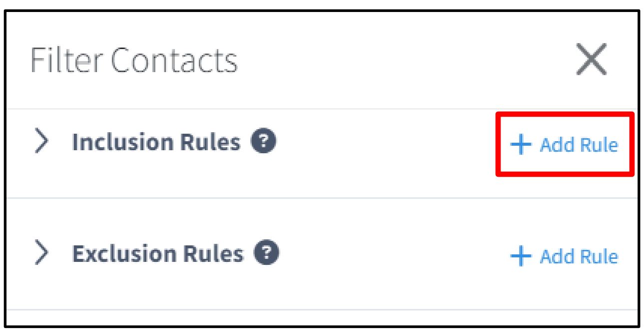
Note

Filtering the contact list does not affect the views of other users. You are the only user who sees these changes.

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the **Filter** button. The Filter Contacts slide-out panel appears.



3. In the Inclusion Rules section, click the **+ Add Rule** button.



4. Locate the field you want to filter by in the expandable categories or by typing in the search box. Some fields commonly used as filters:
   - **Group** – Group(s) your contacts belong to.
   - **Lead Source** – Indicates where contact records came from (landing pages, LinkedIn connections, open houses, refinance prospects, and so on).
   - **Birthday** – Birthdate range of your contacts.
   - **Loan Information** – Interest rate, loan type, loan status, and more.

Tip

Contacts associated with multiple loan records are filtered according to the information on their most recent loan.

5. Click the field name to open its filter selector.

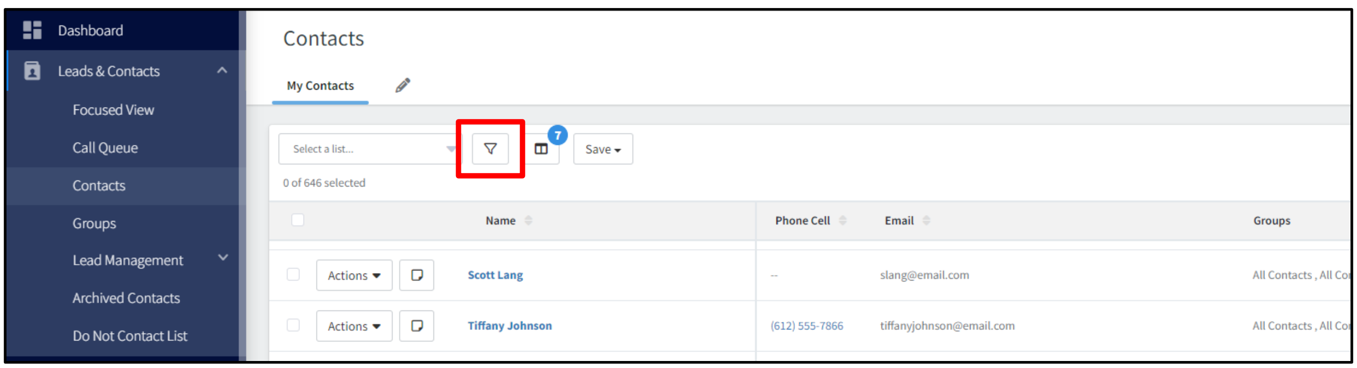
6. Define your desired criteria according to the type of field you selected (such as a value or drop-down selection).
7. Click the **Done** button when you are satisfied.
    - Your list updates in the background.
8. Add more rules as desired.
9. Click the **X** button in the upper-right corner of the panel to close the panel and view your newly updated contact list.

Tip
Click the **Reset** button to clear your filter settings and show all your contacts in the list.

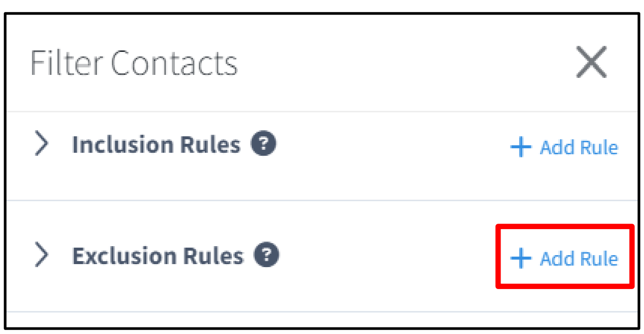
How to Use Exclusion Filters

Note
Filtering the contact list does not affect the views of other users. You are the only user who sees these changes.

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the **Filter** button. The Filter Contacts slide-out panel appears.



3. In the Exclusion Rules section, click the **+ Add Rule** button.



4. Locate the field you want to filter by in the expandable categories or by typing in the search box.
5. Click the field name to open its filter selector.

6. Define your desired criteria according to the type of field you selected (such as a value or drop-down selection).
7. Click the **Done** button when you are satisfied.
   - Your list updates in the background.
8. Add more rules as desired.
9. Click the **X** button in the upper-right corner of the panel to close the panel and view your newly updated contact list.

Tip
Click the **Reset** button to clear your filter settings and show all your contacts in the list.

Column Organization

The column picker allows you to edit the columns that are shown on your contact list. You can then rearrange your columns by dragging and dropping them in any order.

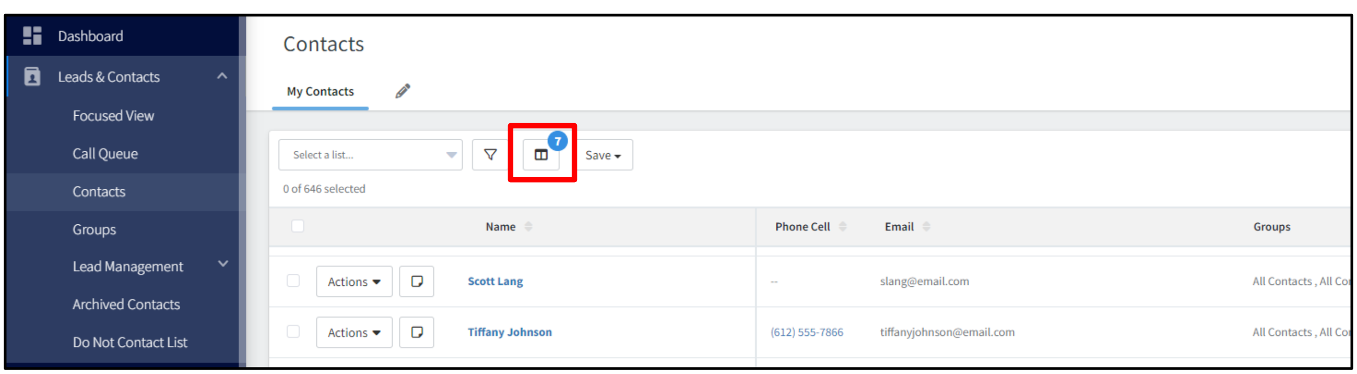
Note
The Actions and Name columns cannot be adjusted. These columns are frozen and cannot be hidden or rearranged.

Commonly added columns include:

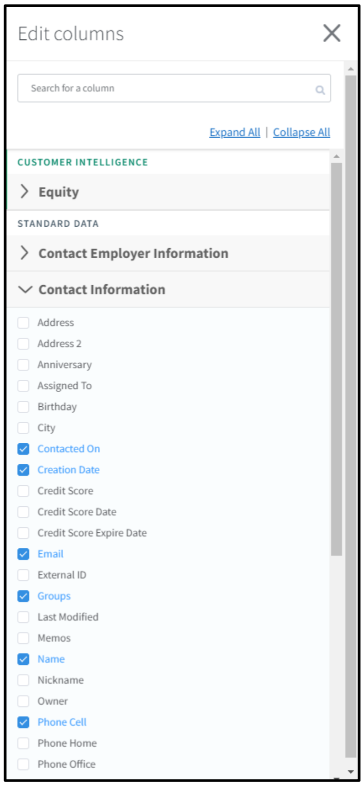
- Birthday
- Address
- Email
- Phone Cell
- OK to SMS (text message preference)
- Lead Source

How to Edit Columns

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the **column selector** button. The Edit columns slide-out panel appears.



3. Locate the columns you want to add or remove in the expandable categories or by typing in the search box.
4. Check the box(es) next to the column name(s) you would like to add. Uncheck the box(es) for those you want to remove.
    - A blue checkmark signifies the column has been added.
    - Your list updates in the background.



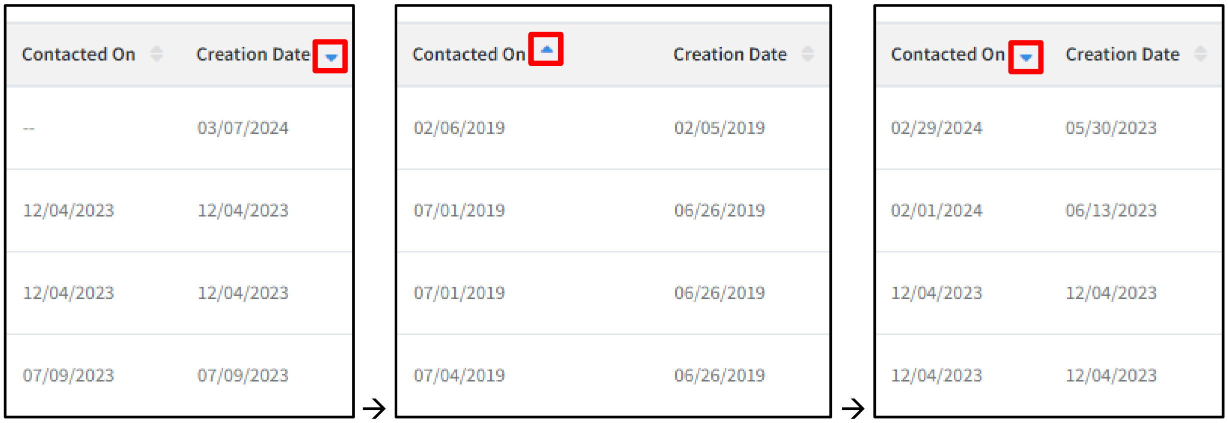
5. Click the **X** button in the upper-right corner of the panel to close the panel and view your newly updated contact list.

How to Rearrange Column Headers

Click and hold on a column header you want to move, then drag it and drop it in your preferred location. Fixed columns cannot be moved.

Sorting the List

Click a column header to sort the list by the contents of that column. Click the same column header a second time to reverse the order. A small blue arrow indicates which column is currently sorted, and whether the sort is ascending or descending.

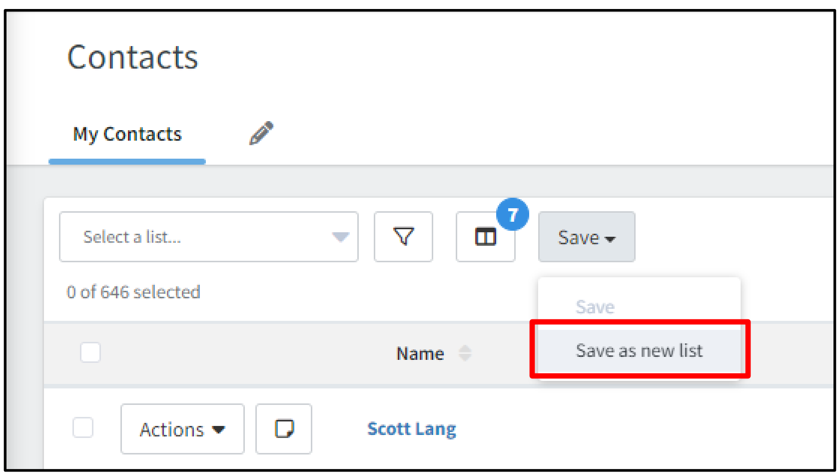


Saving Lists

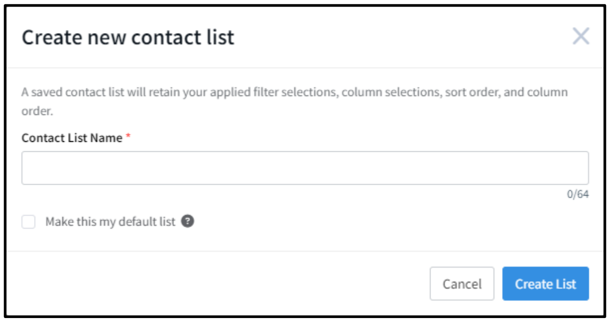
When you use filters, column selections, and sorting to create a view that you would like to return to in the future, you can save the view as a list. When you save a list, you do not need to re-create the view each time you visit your Contacts page. You can easily switch between multiple saved lists at any time by using the list picker.

How to Save a New List

1. Navigate to **Leads & Contacts → Contacts**.
2. Add filters, make column selections, and sort the list as described in the previous sections.
3. When you are satisfied with the view, select **Save → Save as new list**.



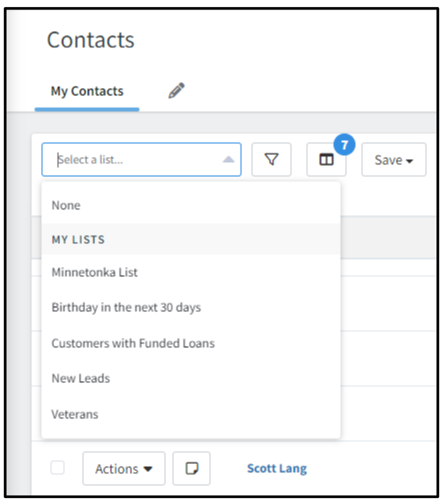
4. The Create new contact list box appears. In this box:
    a. Enter a name for the list.
    b. (Optional) Check the box to make this your default list. (The default list is displayed when you load the Contacts list page. If no saved list has been made default, all contacts are shown.)
5. Click the **Create List** button.



How to Navigate Between Saved Lists

Note
You need to have at least one saved list in order to perform this action. See above for more information on how to save lists.

1. Navigate to **Leads & Contacts → Contacts**.
2. In the **Select a list…** drop-down list, select a saved list. Selecting **None** returns you to the default list.



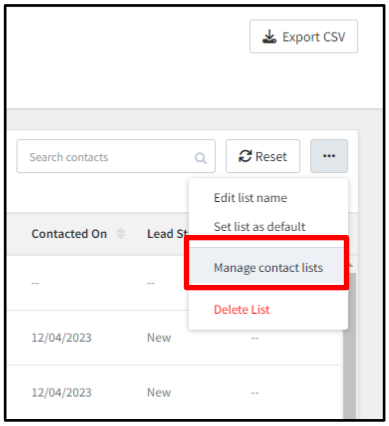
How to Manage Saved Lists

Note
You need to have at least one saved list in order to perform this action. See above for more information on how to save lists.

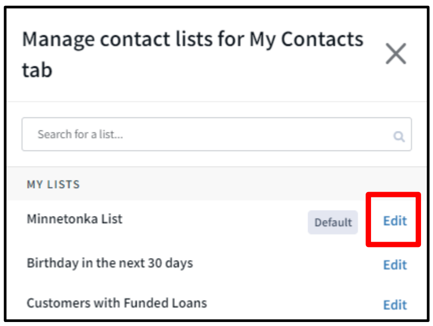
1. Navigate to **Leads & Contacts → Contacts**.

Note
You can have different saved lists in each tab, so be sure you have the correct tab selected. See Pipeline Views below for more information.

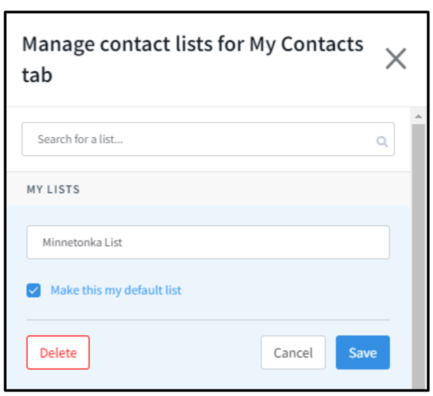
2. On the right side of the page, select **[…] → Manage contact lists**.



3. In the Manage contact lists slide-out panel, locate the list you want to manage and click **Edit**.



4. Make your update(s). Updates include:
    - Changing the name of the list
    - Making a list your default (or changing the default list to not be the default)
    - Deleting the list entirely (this action cannot be undone)
5. When you are satisfied, click the **Save** button.

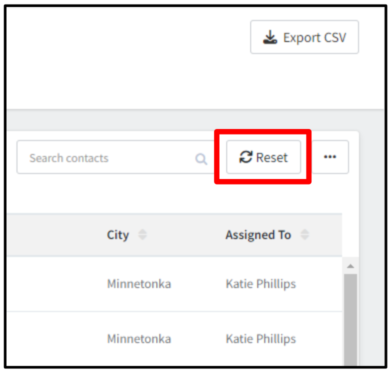


Resetting Lists

Clicking the **Reset** button clears any unsaved filters and changes to column setup:

- If you are viewing a saved list and have made changes to the view without saving them, clicking this button restores your list to the most recently saved version.

- If you have not yet saved the current view at all, clicking this button restores the list to the Total Expert default view.

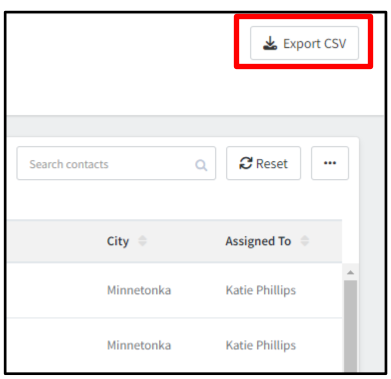


How to Export My Contacts

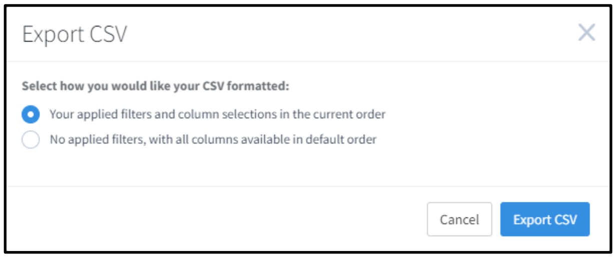
Note
This function requires a certain permission to perform. Please reach out to your internal administration team for more information.

You can download your contact list as a .csv file, which you can then import to another application. You can either export your full list of contacts or a filtered subset of them.

1. Navigate to **Leads & Contacts → Contacts**.
2. (optional) If you want to export a custom version of the contact list, apply any filtering, sorting, or custom columns that you want to be reflected in the exported file.
3. In the upper-right corner of the page, click the **Export CSV** button.



4. In the Export CSV box that appears, select whether you want to export the view as it appears on the screen (reflecting your current filters, sorting, and columns) or the full unfiltered list with Total Expert default setup.
5. Click the **Export CSV** button.



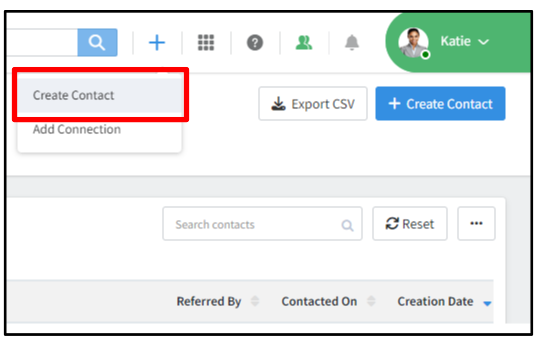
6. Use your local system to save the file to a known location. From there, you can use the file in any application.
7. Select your downloaded CSV file to open your exported contact list.

How to Manually Add Individual Contacts

Warning
Manually entered contacts are not scanned for duplicates. You need to merge contacts together if you have more than one record of the same contact.

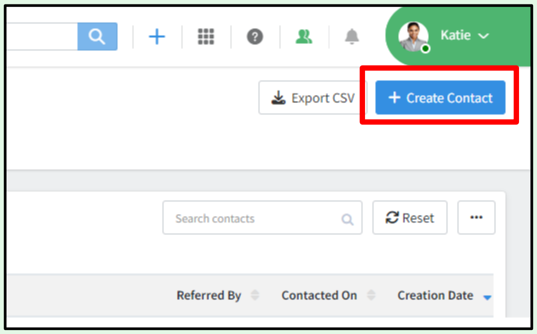
Note
Any lead source automation rules you have set up are not executed for any contacts that are entered into the platform manually. This only occurs for contacts that come through a third-party vendor, lead capture application, or single property sites.

1. From any page in Total Expert, in the top navigation, click the **plus symbol** (**+**).
2. Select **Create Contact**.



3. Use the form to input as much information as you have for the contact.
4. Click the **Save** button.

Tip
You can also create a contact from the contact list page. On the right side of the page, click the **+ Create Contact** button.



Pipeline Views

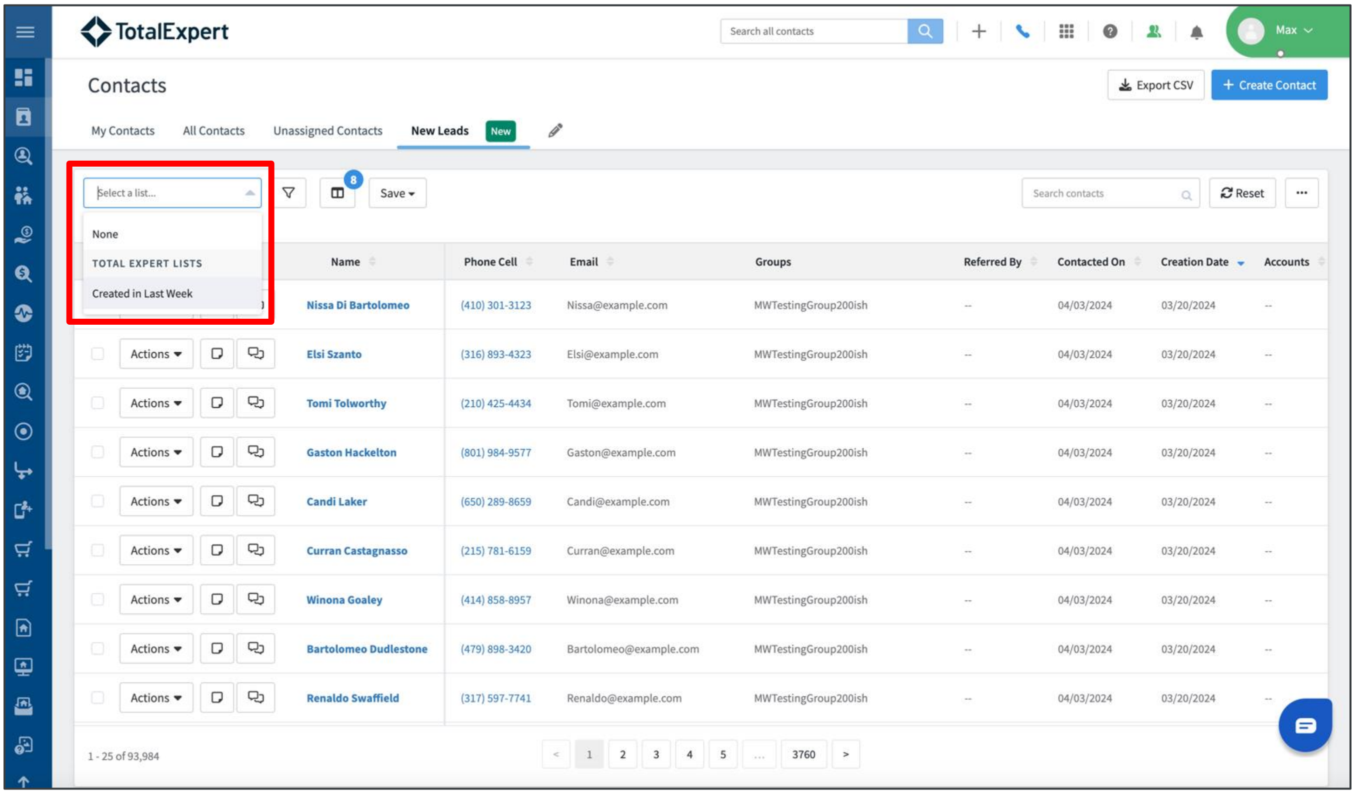
Pipeline views allow organizations and individual users to set up saved views in the contact list to to emphasize potentially high-value opportunities and reduce the time required to locate and contact the right people.

Tabs are used on the contact list page to store predefined views that users can quickly switch to. Administrators can create and publish organization tabs to all users in their organization or to selected teams. Non-administrators can create custom tabs that are specific to their account.

Saved lists are stored in each tab to create related refined views. A saved list uses sorting, filtering, and column selections to display a grouping of contacts and their pertinent information. Administrators create 1 or more lists for each organization tab; these organization lists are available to anyone with access to the tab. Non-administrators can create and save custom lists in each organization or custom tab. Organization and custom lists are tied to the tab where they were created; they are not visible in other tabs. Custom tabs are only visible to the user who created them.

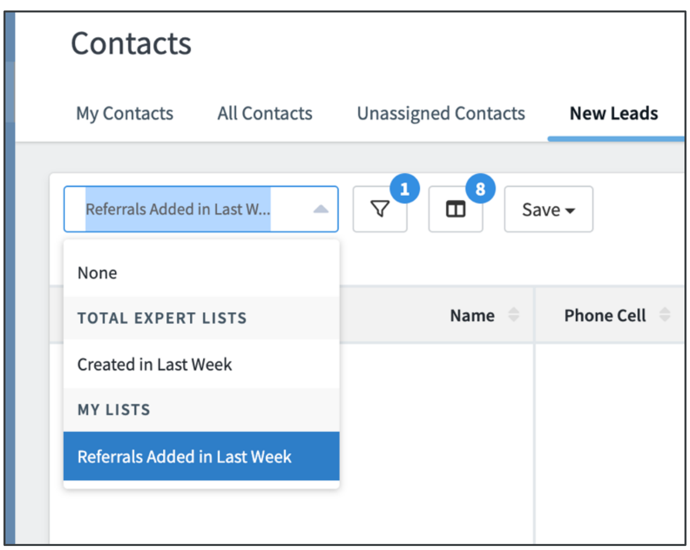
Using Organization Tabs

1. Navigate to **Leads & Contacts → Contacts**.
2. Click on an organization tab.
3. (optional) Select a list from the **Select a list…** drop-down list to serve as a foundation for your custom list.



4. Use the filter tool, sorting, and column selector to customize the view as desired.
5. Select **Save → Save as new list**.

The custom list is now saved in the organization tab under MY LISTS. Other users with access to the tab do not see your custom lists.



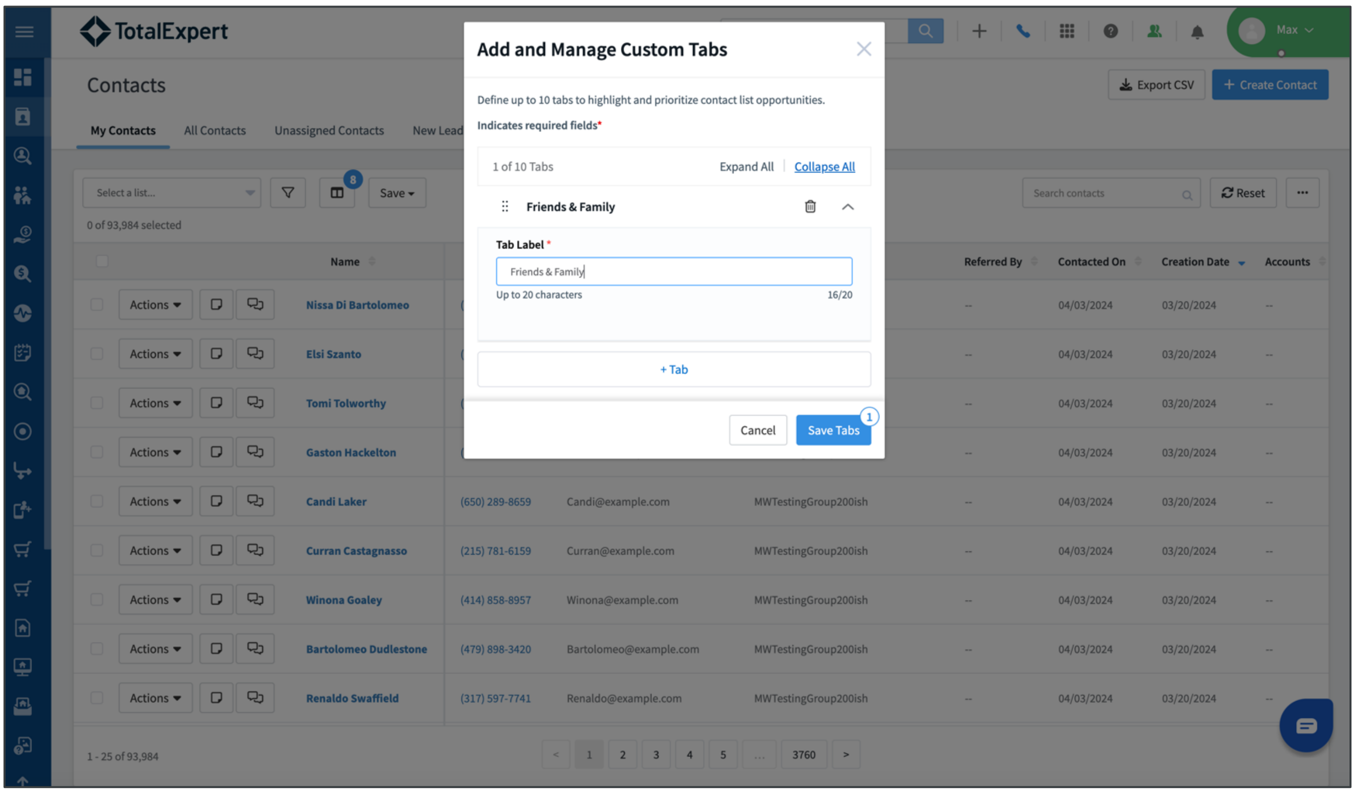
Note
Non-administrator users cannot edit or delete organization tabs. They also cannot modify the organization's lists within a tab. They can add their own lists to an organization tab.

If an administrator deletes an organization tab, the user-specific lists in that tab are moved to the user's My Contacts tab.

Tabs newly published by an administrator have a New label. After 1 week, this label disappears.

Managing User-Specific Custom Tabs and Lists

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the **Add and manage custom tabs** button (pencil icon) on the tab row.
3. In the Add and Manage Custom Tabs box:
    a. Click the **+Tab** button.
    b. Enter a name in the **Tab Label** field that appears. The name is limited to 20 characters.
    c. Click the **Save Tabs** button.



4. Click on the new tab.
5. Use the filter tool, sorting, and column selector to customize the view as desired.
6. Select **Save → Save as new list**.

Note

All saved list functionality (renaming, deleting, and making changes to a saved list) works the same way as it would in non-pipeline views. Lists are contained within a specific tab, however.

Non-administrator users can create up to 10 of their own custom tabs and as many lists as they want in a tab.

Actions

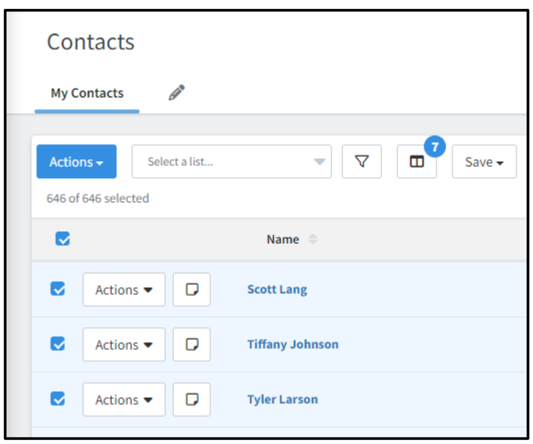
The most common actions taken on contact records include the following:

- Sending SMS (text message) communications
- Sending email communications
- Opting contacts out of SMS communications
- Inviting contacts to co-market using Total Expert
- Adding contacts to email campaigns
- Putting contacts into specific groups
- Exporting contacts to a CSV file

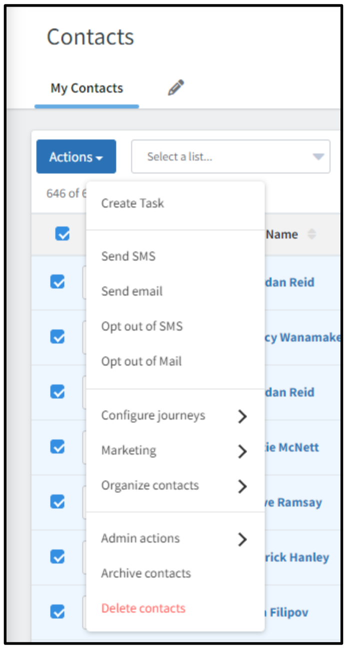
How to Take Bulk Actions on Contact Lists

1. Navigate to **Leads & Contacts → Contacts**.
2. By default, the My Contacts tab is selected with the default list showing. You can select another tab/list combination or use any other method to show relevant contacts in the list.
3. On the left side of the list, click the checkboxes for the contacts you want to take bulk action for.

Tip
You can click the checkbox in the header row to select all the contacts in the current list at once. The action you select will apply only to these contacts. For example, if you have 100 total contacts, but a filter applied to list only 30, checking the box in the header will select only those 30, not all 100.



4. Click the blue **Actions** button.
5. Select an action from the drop-down list.



How to Send Direct Emails to Contacts

- Navigate to **Leads & Contacts → Contacts**.
- Locate the contact(s) you want to send an email to. Use the search bar to find a specific contact quickly.
- Check the box next to each contact name.
- Select **Actions → Send email**. You are redirected to the email template list, which shows a reminder of how many contacts were pre-selected.
- Use the search bar, folders, and tags to quickly find your email template.
- Next to the email template, click **Actions → Send**.
- (Optional) Edit the email content and message settings (if applicable). You can also adjust the recipient list on the Recipients tab.
- Click the **Send Email** button.

Tip
It is always good practice to preview your email before you send it.

How to Send Direct Emails to Contacts in Bulk

Tip
Create a saved list to easily communicate with a specific list of contacts.

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the list selector to choose your saved list.
3. Click the checkbox in the header to select all contacts in the list.
4. At the top of the page, select **Actions → Send email**. You are redirected to the email template list, which shows a reminder of how many contacts were pre-selected.
    - A pop-up box may appear if you have contacts that have unsubscribed from messages or are silenced. Click the **Ok** button to continue.
5. Use the search bar, folders, and tags to quickly find your email template.

6. Next to the email template, click **Actions → Send**.
7. (Optional) Edit the email content and message settings (if applicable).
8. Click the **Send Email** button.

How to Invite Contacts to Co-Market

1. Navigate to **Leads & Contacts → Contacts**.
2. Locate the contact(s) you want to connect with. Use the search bar to find a specific contact quickly.
3. Check the box next to each contact name.
4. Select **Actions → Marketing → Invite to co-market**.
    a. If you selected only 1 contact, a box appears.
        i. Click the **Create Invitation** button to proceed directly with sending an invitation email.
        ii. Click the **Set up Profile** button to fill in some information that will be included in the user profile for the connected account before sending the invitation email.
    b. If you selected multiple contacts, you are routed directly to the email invitation editor.

> **Note**
> The option to set up the profile may not be available due to your organization's setup.

If Create Invitation Was Chosen

1. (Optional) Update the email invitation content.
2. Click the **Send Invitation** button.

If Set up Profile Was Chosen

All of the profile options here are optional.

1. Input contact information, then click the **Next** button.
2. Input license and MLS information, then click the **Next** button.
3. Add a profile picture and/or logo image, then click the **Next** button.
4. Update the email invitation content.
5. Click the **Send Invitation** button.

How to View Contact Records and Information

> **Note**
> You can use first name, last name, nickname, or a combination when searching for the contact by their name.

There are two areas where you can search for contact information:

- Leads & Contacts page
- Top navigation search bar

Leads & Contacts Page

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.

3. Click the name of the contact to view contact information.

Top Navigation Bar

1. From any page in Total Expert, in the top navigation bar, use the search bar to quickly find your contact.
   - Search by name, email, or phone number.
2. The contact list page loads with the results of your search.
3. Click the name of the contact to view contact information.

How to Edit Contact Information

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
   - Search by name, email, or phone number.
3. Click the name of the contact.
4. In any section of the Profile tab, click **Edit**. A pop-up box opens with the fields in that section.
5. Make your edits then click the **Save** button.

How to Add Contacts to a Drip Campaign

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
   - Search by name, email, or phone number.
3. Check the box for each contact you want to add to the campaign.
4. Select **Actions → Marketing → Add email campaign**.
5. In the slide-out panel, select an email campaign and a co-marketer (if applicable) from the drop-down lists.
6. Click the **Submit** button.

How to Add Contacts to a Journey

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
   - Search by name, email, or phone number.
3. Check the box for each contact you want to add to the journey.
4. Select **Actions → Configure journeys → Add a journey**.
5. In the slide-out panel, select a journey from the drop-down list.
6. Select a trigger in that journey to determine where the contacts join the journey.
7. Click the **Submit** button.

How to Remove a Contact from a Journey

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
   - Search by name, email, or phone number.
3. Check the box for each contact you want to remove from the journey.
4. Select **Actions → Configure journeys → Remove a journey**.
5. In the slide-out panel, select a journey from the drop-down list.
6. Click the **Submit** button.

How to Delete Contacts

Note
You cannot delete a contact that is associated with a loan or that is shared from another TE user. However, you can archive the contact instead.

Warning
This process cannot be undone!

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Check the box for each contact you want to delete.
4. Select **Actions → Delete contacts**.
5. Read the information in the confirmation box and click the **Ok** button.

How to Archive Contacts

Archiving contacts is useful if you cannot delete a contact that is tied to a loan or is a shared with you from another user.

Archived contacts:

- Are not visible on the Contacts page
- Do not receive automated communications
- Do not appear in Daily Digest emails
- Are archived for any user who has access to them

To archive a contact:

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Check the box for each contact you want to archive.
4. Select **Actions → Archive contacts**.
5. (optional) Select a reason for archiving the contact from the drop-down list.
6. Click the **Archive** button.

How to Silence Communications with Contacts

Silencing communications for a contact means that person no longer receives emails or text messages. This action *can* be undone.

To silence communication for a contact:

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.

3. In the row for the contact, select **Actions → Updated contact preferences → Silence communication**.

or

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
   - Search by name, email, or phone number.
3. Click the name of the contact to open the contact details page.
4. Select **Actions → Silence Communication**.

Tip
To undo this action, repeat either set of steps above, except select **Unsilence Communication**.

Sharing and Assigning Contacts

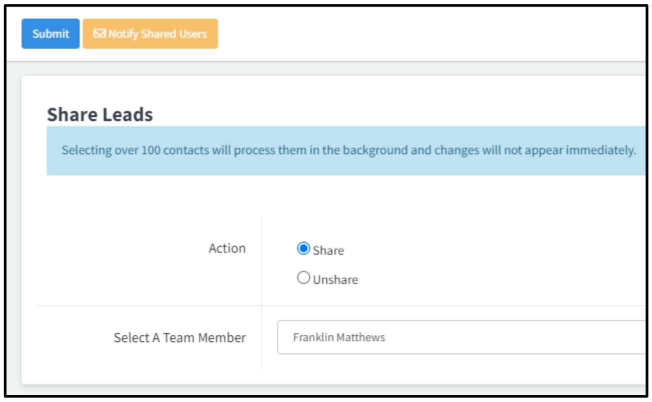
The difference between sharing and assigning a contact is:

- **Sharing** – The user that a contact record is shared with gains access to view any information associated with that record. They also get limited ability to edit the record. A user who has had a contact record shared with them cannot delete, archive, or un-archive (activate) that record. They also cannot share or assign that record via the contact list.
  - A record can be shared with multiple users at a time.
- **Assigning** – The user that a contact record is assigned to gains full editing rights to the record, except that they cannot delete it. Assigned users can share the record with other users or change the assignment to another user. If the user a contact record is assigned to archives that record, it is archived for all users with access to the record, including the owner.
  - A record can only be assigned to 1 user at a time.

How to Share Contacts

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
   - Search by name, email, or phone number.
3. Check the box for each contact you want to share.
4. Select **Actions → Admin actions → Share with user**.
5. In the slide-out panel:
   a. Select the **Share** option.
   b. In the **Select A Team Member** drop-down list, select the name of the user you want to share the contacts with.
   c. (optional) Click the **Notify Shared Users** button. In the box, select which users should be notified that the contact record is being shared with another user.
   d. Click the **Submit** button.

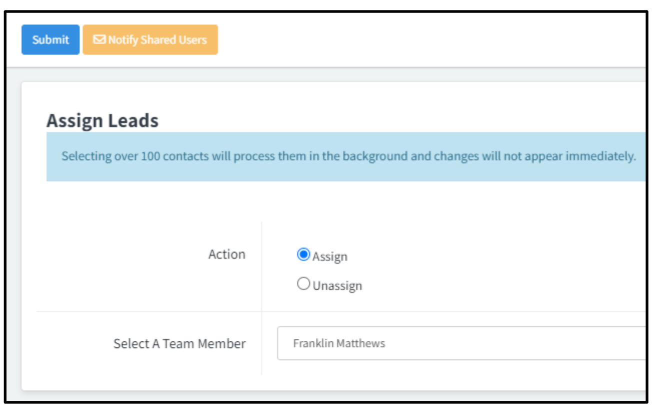
You can unshare the record by following the same steps, except select **Unshare** in step 5a.



How to Assign Contacts

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Check the box for each contact you want to assign.
4. Select **Actions → Admin actions → Assign to user**.
5. In the slide-out panel:
    a. Select the **Assign** option.
    b. In the **Select A Team Member** drop-down list, select the name of the user you want to assign the contacts to.
    c. (optional) Click the **Notify Shared Users** button. In the box, select which users should be notified that the contact record is being assigned to another user.
    d. Click the **Submit** button.

You can unshare the record by following the same steps, except select **Unassign** in step 5a.



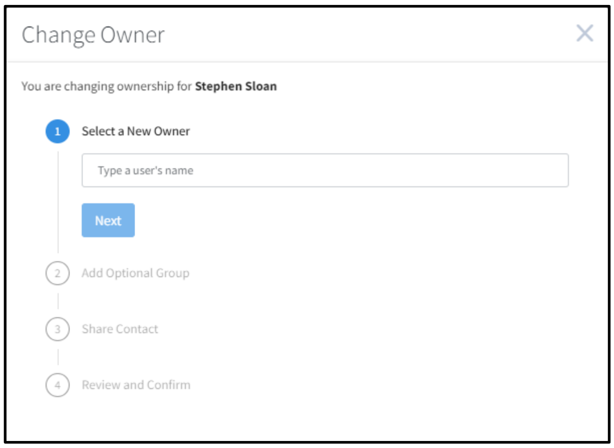
How to Change Owners of a Contact Record

This process depends on whether or not a contact record being transferred is a participant on a loan record.

If the Contact Is Not a Loan Participant

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.

3. Check the box for each contact you want to assign.
4. Select **Actions → Admin actions → Change owner**.
5. In the Change Owner box:
    a. In the **Select a New Owner** drop-down box, select the name of the user you want to transfer the selected contacts to. You can type a partial name in the box to filter the list.
    b. Click the **Next** button.
    c. (optional) In the Add Optional Group step's **New Group Name** field, enter the name of a group you want to add these contacts to.
    d. Click the **Next** button.
    e. You are asked whether you want to share the transferred contacts with yourself. Contacts not shared with you are removed from your account.
    f. Click the **Next** button.
    g. Review the information regarding the effects on the contact if you proceed.
    h. Click the **Confirm and Change Owner** button.



When at Least 1 Contact Is a Loan Participant

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Check the box for each contact you want to assign.
4. Select **Actions → Admin actions → Change owner**.
5. In the Change Owner box:
    a. You are asked whether you want to transfer the associated loans. Select either **Yes** or **No**, depending on whether you want to transfer these loans.

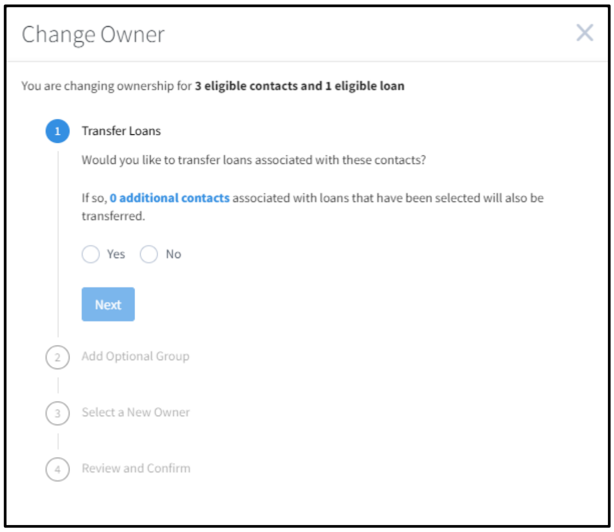
Note

If you select Yes to transfer the loans, the behavior of other contact records associated with those loans depends on whether they are associated with other loans not being transferred:

• If a contact record is not associated with any other loans, it is simply transferred to the new owner.

• If a contact record is associated with a loan that is not being transferred, a copy of the contact record is made, with both the old and new owners having a copy of that record.

b. (only if you selected No above) You are asked whether you want to share the transferred contacts with yourself. Contacts not shared with you will be archived in your account. They will be visible (with the Archived label) on the loan record and in the Archived Contacts list.
c. Click the **Next** button.
d. (optional) In the Add Optional Group step's **New Group Name** field, enter the name of a group you want to add these contacts to.
e. Click the **Next** button.
f. In the **Select a New Owner** drop-down box, select the name of the user you want to transfer the selected contacts to. You can type a partial name in the box to filter the list.
g. Click the **Next** button.
h. Review the information regarding the effects on the contact if you proceed.
i. Click the **Confirm and Change Owner** button.



How to Send BombBomb Videos to Contacts

Note
You must have your BombBomb integration set up before you can perform the following steps. See the integration guide for more information on BombBomb video.

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Check the box for each contact you want to send the video to.
4. Select **Actions → Marketing → Send BombBomb video**.
5. The page redirects to the email template list page with a filter applied to show only templates with a BombBomb placeholder. Select **Actions → Send** for the email you want to use.
    a. If the BombBomb placeholder for this template has a preselected video, no action is necessary in that component.
    b. If the BombBomb placeholder does not have a preselected video:
        i. Double-click the BombBomb component. The Select A Video box opens.

ii. Either select a saved video from the gallery or click the **Record New Video** button to save a new video to your gallery, then select it.

6. Use the email sender to make any other customizations to the email and click the **Send Email** button.

How to Merge Contacts

Note
This function requires a certain permission to perform. Please reach out to your internal administration team for more information.

Warning
This action cannot be undone! Manually entered contacts are not scanned for duplicates. You need to merge contacts together if there is more than one record of the same contact.

Merging contacts allows you to combine two of the same contacts in your Total Expert system.

The following occurs after the merge is completed:

- Loan data, recent activity, tasks, and notes from the merged contact will become affiliated with the primary contact.
- Duplicate journey data will be removed while primary journey data remains.
- A note will be added to the resulting merged contact record.

To merge 2 or more contact records into a single record:

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
   - Search by name, email, or phone number.
3. Check the box for each contact record you want to merge.
4. Select **Actions → Organize contacts → Merge contacts**. This option is only available if you have selected at least 2 records.
5. In the Merge Contacts box, select which record that all the information from the selected records should be merged into. This is referred to as the primary contact record.

Note
Some basic information is shown for each selected record. You can click **View Details** for each record to open the full details page for that record in a new tab to determine which should be the primary record.

   a. If any secondary record has information where the primary record is blank, the information from the secondary record is added to the primary record.
   b. If both the primary and any secondary contact records have differing information in the same field, the information in the primary record is retained.
6. Click the **Next** button.
7. On the final screen, review the information shown as a sample from what the merged record would look like. If you are not satisfied, click the **< Back** button and adjust your selection.
8. Check the box to acknowledge that you have read the information about the effects of merging the records. Once you proceed, you cannot undo this operation.

9. Click the **Merge Contacts** button.
10. In the final confirmation box, click the **Merge Contacts** button.

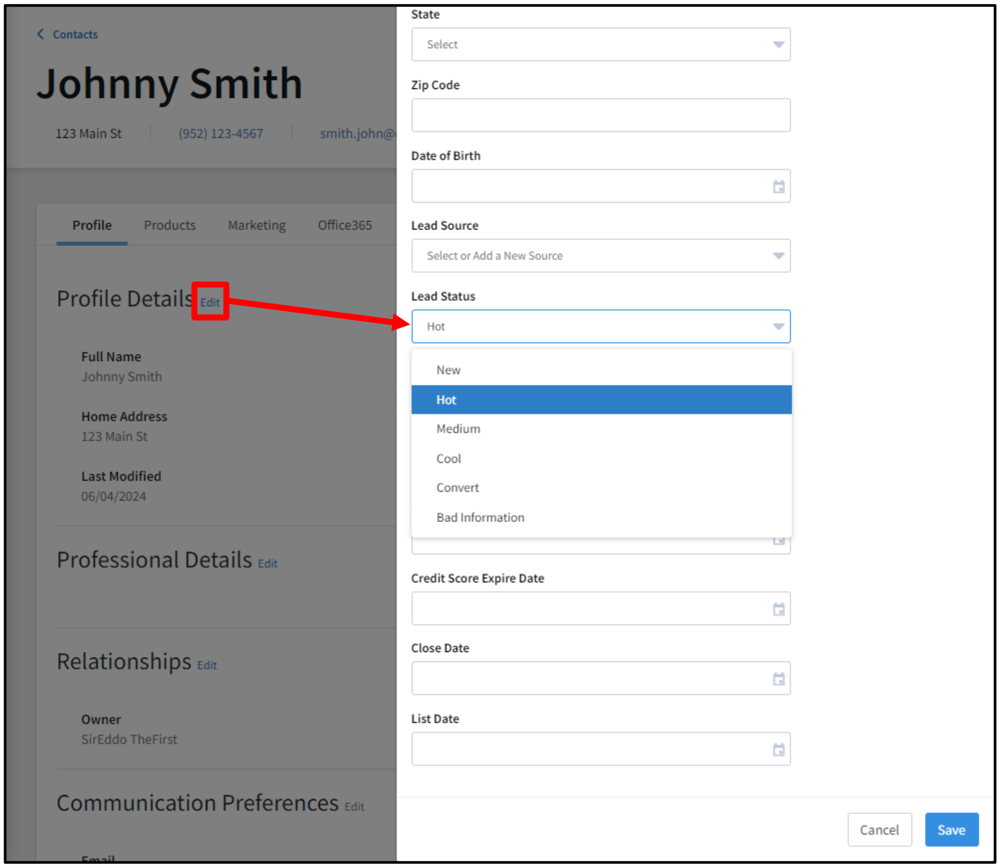
The following will occur during this example merge:

- John Smith is being merged into Johnny Smith (Johnny is the primary record).
- John Smith's address and cell phone number will be added to Johnny Smith's information, because Johnny's record has no information in these fields.
- Johnny Smith's email will be kept because both records have information in this field.

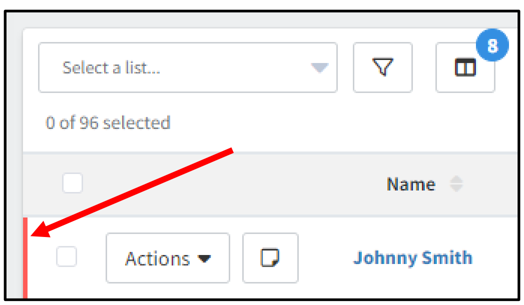
How to Set Lead Statuses for Contacts

The lead status of a contact record is indicated by a color bar on the far left side of the contact list.

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Click the name of the contact record whose status you want to modify.
4. On the contact details page, click the **Profile** tab.
5. In the Profile Details section, click **Edit**.
6. In the Edit Profile Details box, scroll down to the Lead Status field and select one of the following:
    a. **New** – no color
    b. **Hot** – red
    c. **Medium** – orange
    d. **Cool** – blue
    e. **Convert** – green
    f. **Bad Information** – gray
7. Click the **Save** button.



The next time you load the contact list, the contact will show the color that corresponds to the status you selected.



Tip

You can filter contacts by their lead status.

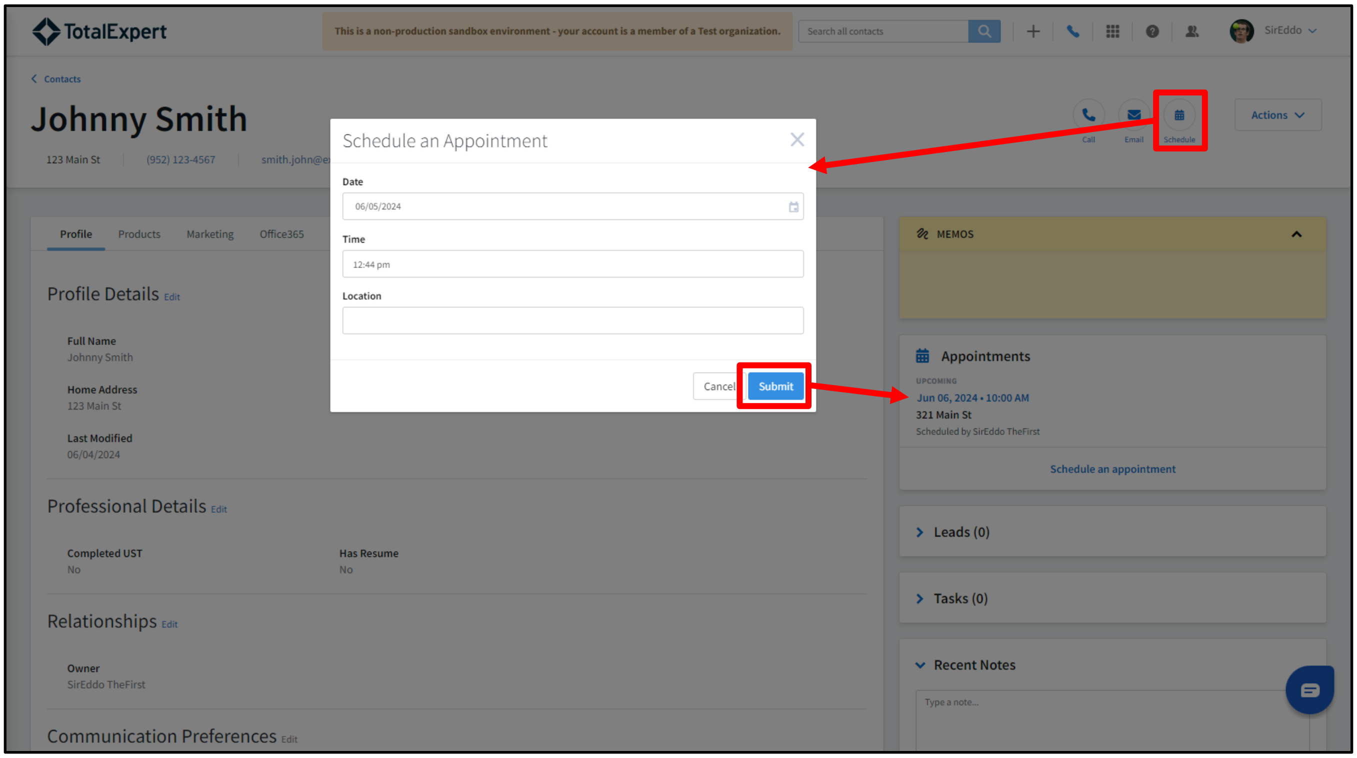
How to Add Appointments to Contacts

Appointments allow you to keep tabs on how well you do with bringing in new sellers or buyers.

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Click the name of the contact record you want to add an appointment to.
4. On the contact details page, click the **Schedule** button.
5. In the Schedule an Appointment box, enter the date, time, and location of the appointment.

6. Click the **Submit** button.

The appointment is added to the right side of the contact details page below the MEMOS section. If your user rolw has permission, you can also view appointments with all contacts by navigating to **Reporting & Analytics → Appointments**.



Tip
You can edit or delete the appointment by clicking the date in the Appointments section.

How to Add Tasks to Contacts

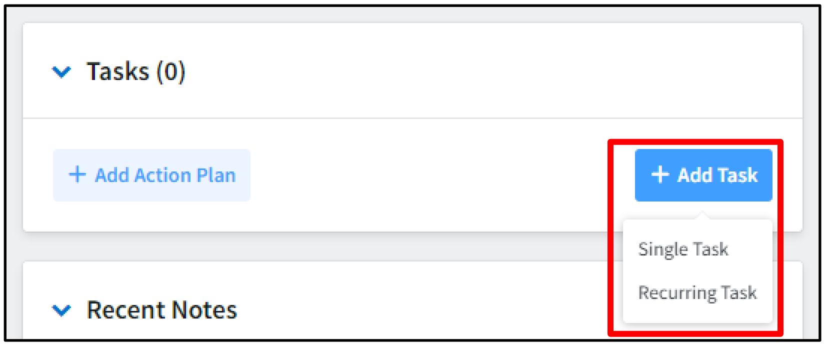
There are two different types of tasks you can add to contacts:

- **Task** – General task such as touching base with a possible buyer.
- **Recurring Task** – Task that happens more than once on a regular schedule, such as calling a contact every two weeks.

To create a task associated with a particular contact:

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
   - Search by name, email, or phone number.
3. Click the name of the contact record you want to add a task to.
4. On the contact details page, click the **Tasks** section to expand it.
5. Click the **+ Add Task** button and select either:
   a. **Single Task**
   b. **Recurring Task**

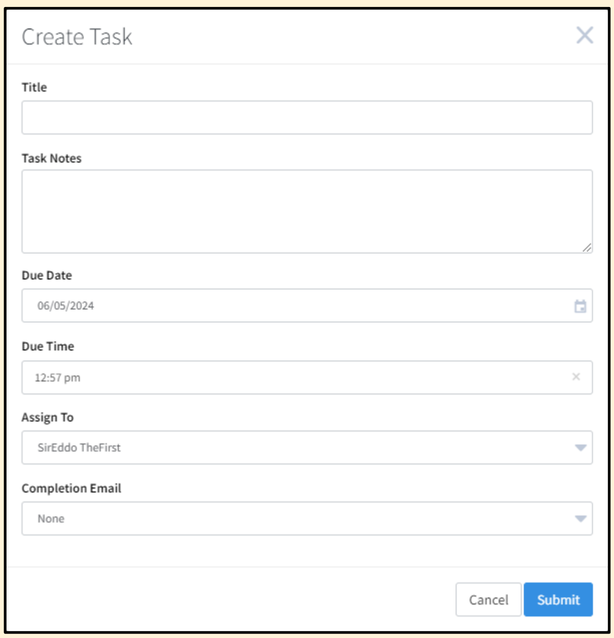
6. In the Create Task box, enter your task information, then click the **Submit** button.



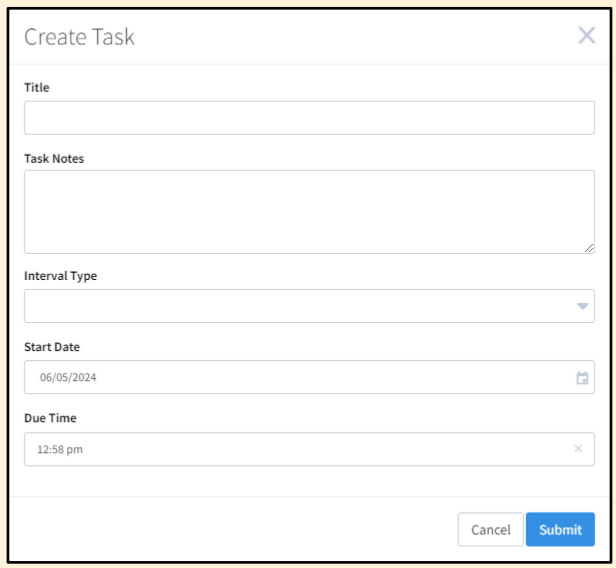
Note

The options available in the Create Task box are slightly different, depending on whether you chose Single Task or Recurring Task.

Single:



Recurring:



Tip

Use the Assign To field to assign the task to another team member.

What Do I Need to Do in Order to Send SMS Messages to Contacts?

There are two steps you need to complete before you can send SMS messages to contacts:

1. Integrate with Twilio.
2. Send an opt-in message to each contact you want to send SMS messages to.

How to Send Text Message Opt-In Request to Contacts

Sending a text message opt-in request is required before you can send your contacts any sort of SMS communication. The contact needs to confirm that they want to receive text messages before further SMS communication can be sent from the TE system.

Note
You must first have your phone number added to your account in order to complete this task.

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Check the box for each contact you want to send an opt-in request to.
4. Select **Actions → Send SMS**.

At this point, the system checks whether your account has a phone number, whether the selected contacts have opted in already, and whether the selected contacts are eligible to receive an opt-in request (must have a valid phone number, must not be opted out or silenced, must not have been sent an opt-in request in the last 12 hours, and must not have already been sent 3 opt-in requests). A box is displayed that summarizes these results.

- If you selected a single contact who is eligible to receive SMS messages, but has not opted in yet, you are prompted to send them an opt-in request. Click the **Yes** button to send the request.
- If you selected a single contact who is ineligible, a message appears to explain why. Correct the situation (if possible) and try again.
- If you selected multiple contacts who are all ineligible, the box states this, and you cannot proceed. Correct the situation (if possible) and try again.
- If you selected multiple contacts, and at least 1 is eligible, the box shows a summary of the statuses. If any have not opted in yet, click the **Next** button.
    - On the next page, the selected contacts who are eligible are listed. You can select the checkboxes to customize which contacts receive the opt-in request, then click the **Send SMS opt-in request(s)** button.

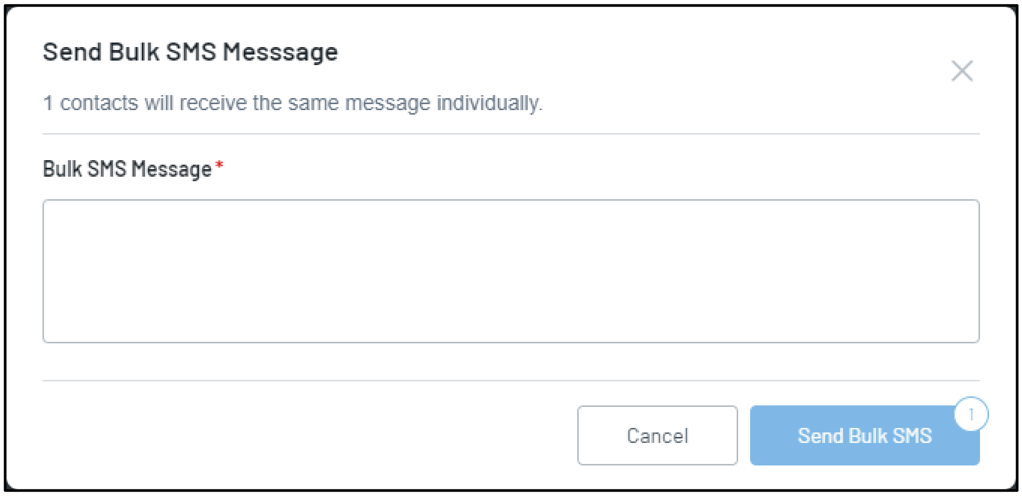
Note
The first time you attempt to send an SMS message, you may be asked to acknowledge a TCPA disclaimer that if a contact expresses a desire to opt out other than by texting "STOP", you are responsible for ensuring that they no longer receive messages.

How to Send SMS Messages to Contacts

Note
SMS messages are delivered between 10am and 7pm CST. Any message you attempt to send outside this window is held until 10am the next day.

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Check the box for each contact you want to send an SMS message to.

4. Select **Actions → Send SMS**.
5. In the Send Bulk SMS Message box:
    a. Type your message.
    b. Click the **Send Bulk SMS** button. Note that the number of contacts you selected (and thus the number of copies of this message you will be sending) is indicated by the bubble on this button and at the top of the box.



If an additional TCPA disclaimer appears, you must accept it to proceed.

How Can a Contact Opt Back in to Receive Emails?

Contacts need to send an email to support@totalexpert.com in order to be opted back in to receive email communications. This is due to laws and regulations that allow a person to control their own opt ins.

The contact must email Total Expert using the exact email address on record that was opted out.

How to Opt Contacts out of Email Notifications

Warning
This action cannot be undone!

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. For the contact you want to opt out, select **Actions → Update contact preferences → Opt out of email**.
4. In the confirmation box, click the **Ok** button.

Note
This cannot be performed as a bulk action. You can only opt out 1 contact at a time.

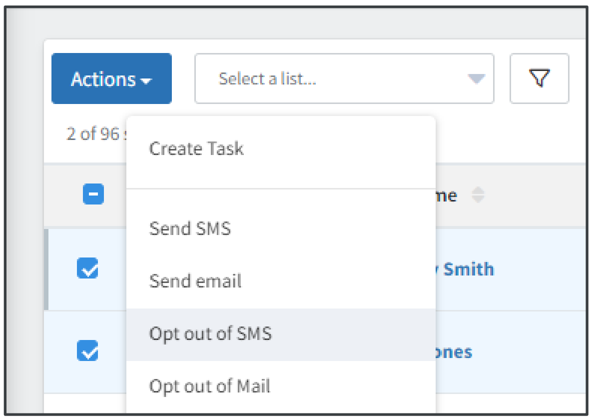
How Can Co-Marketing Partners Opt in to Receive Emails Again?

If your co-marketing partner has already opted out of receiving emails but would like to opt back in, please have them email support@totalexpert.com to request an opt in for email communication with you and your organization.

Once our Product Support team has their information, they will opt them back in right away!

How to Opt Contacts out of Text Messages

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Check the box for each contact you want to opt out.
4. Select **Actions → Opt out of SMS**.



Do Not Contact

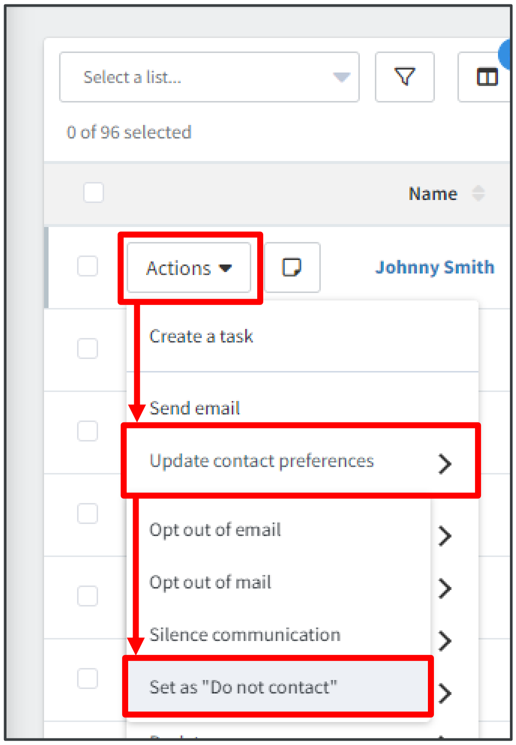
Setting a contact to do not contact (DNC) accomplishes the following:

- The contact is removed from the Contacts list.
- All outbound communication with the contact is stopped.
    - The contact is removed from any journeys they are on.
    - The contact no longer receives automated print messages. (Print pieces that were already in process are still sent.)
    - The contact no longer receives automated SMS or email messages from your organization. Emails flagged as *transactional* are still sent to contacts marked as DNC.
- The contact is added to a separate DNC list.
- The contact is no longer suggested in any Daily Digest emails.
- DNC contacts are still visible in loan records, activity streams, and email statistics pages, but they are shown with an Archived label.

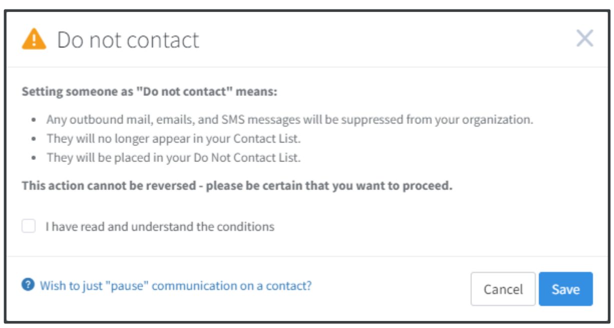
How to Set Contacts as Do Not Contact

Warning
This action cannot be undone!

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. For the contact you want to opt out, select **Actions → Update contact preferences → Set as "Do not contact"**.



4. In the confirmation box, check the box that indicates you have read the information and click the **Save** button.



Note
This cannot be performed as a bulk action. You can only mark 1 contact DNC at a time.

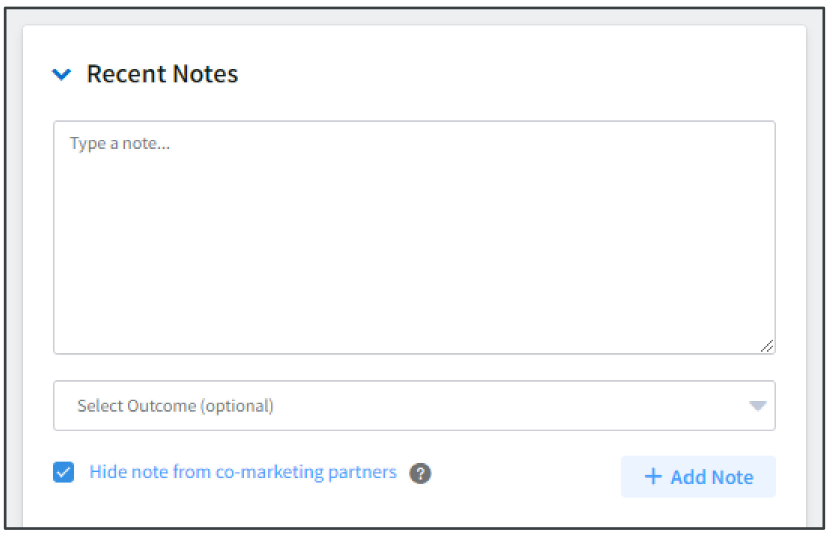
Tip
All of your contacts that are set as Do Not Contact can be found by navigating to **Leads & Contacts → Do Not Contact List**.

Contact Notes

Notes allow you to keep tabs on certain leads after you have reached them (or attempted to). Noting that you called, emailed, left a voicemail, and so on helps remind you of the last interaction you had with the contact.

How to Add Notes to Contacts

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
   - Search by name, email, or phone number.
3. Click the name of the contact record you want to add a task to.
4. On the contact details page, the **Recent Notes** section is expanded by default. In this section:
   a. In the **Type a note…** box, enter the text you want to save to the record.
   b. (optional) Select and outcome from the **Select Outcome** drop-down list. This is listed with the Note when it appears at the bottom of the Recent Notes section and as a separate list item in the Activity tab.
   c. (optional) Check the box to hide the note from co-marketing partners. When this is checked, partners outside your organization with access to this contact record will not see the note.
   d. Click the **+ Add Note** button.



Tip
The note appears immediately in the space at the bottom of the Recent Notes section. Click **View all** below or the Activity tab on the left side of the contact details page to view all the available notes for the contact.

What Are Quick Notes?

Quick notes are intended to be brief notes that you can very quickly add to a record after you reach out to the contact. These notes are not customizable.

Quick notes include:

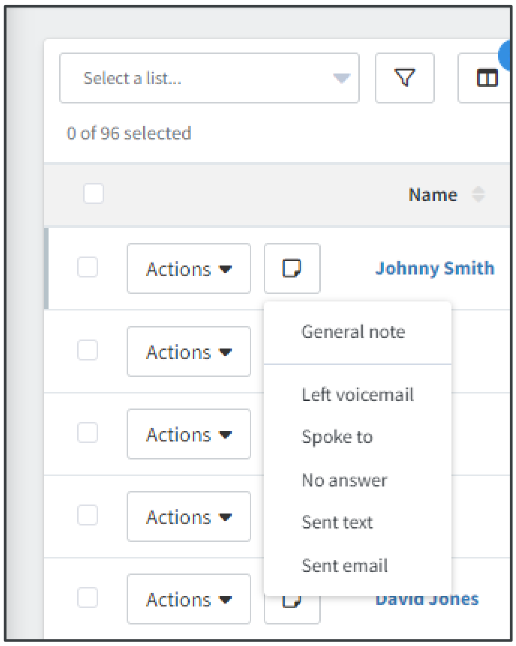
- Left voicemail
- Spoke to

- No answer
- Sent text
- Sent email

How to Add Quick Notes

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. For the contact record you want to add a quick note to, click the **Notes** button.
4. In the drop-down list, select the quick note you want.

Note
You can also create a general note from this menu. This is the same kind of note as what you create in the Recent Notes section of the contact details page described above.



Contact Groups

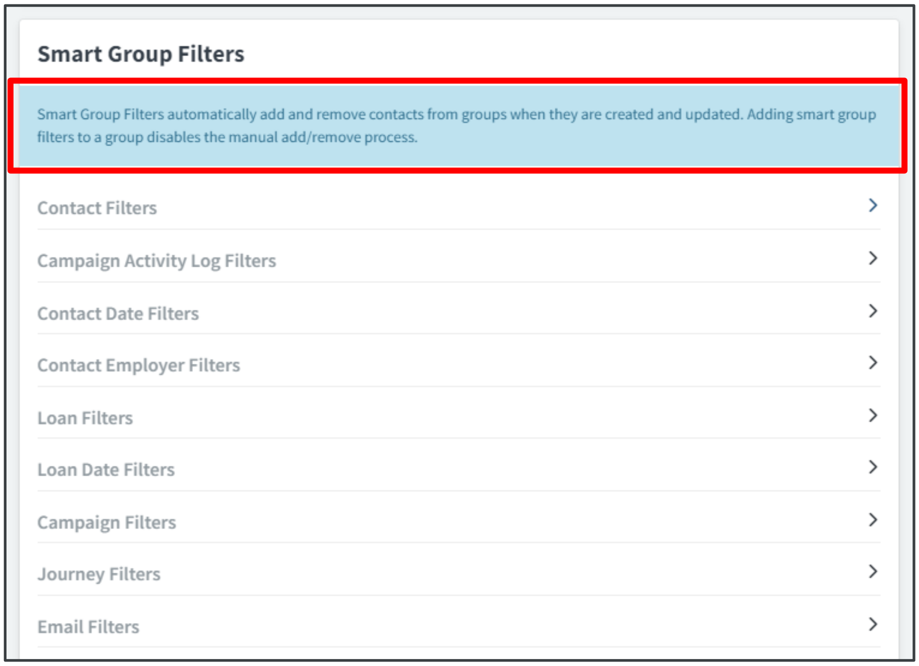
Groups are an easy way for you to combine and categorize certain contacts or leads. There are two different types of groups that you can create:

- **Manual Groups** – These do not have any connected criteria or filters added. Use this method if you want to manually add and remove contacts from the group.
- **Smart Groups –** These automatically and dynamically adjust the contacts in the group according to the filters that you define.

How to Create Smart Groups

1. Navigate to **Leads & Contacts → Groups**.
2. Click the **+Create** button.

3. In the slide-out panel:
    a. Enter a name and description for the group.
    b. In the Smart Group Filters section, enter the criteria that you want to determine which contacts should be included in the group. The available filters depend on your user role.



    c. Click the **Submit** button at the top.

As soon as the group is created, it is populated with the contacts who match the criteria you defined for the group. As new contacts are added or existing contacts are modified, the smart group automatically updates its member list so that the correct contacts are included.

How to Create a Manual Group

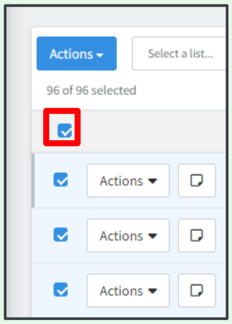
1. Navigate to **Leads & Contacts → Groups**.
2. Click the **+Create** button.
3. In the slide-out panel:
    a. Enter a name and description for the group.
    b. Do *not* make any selections in the Smart Group Filters section. (If anything is entered in this section, the group automatically becomes a smart group.)
    c. Click the **Submit** button at the top.

How to Add Contacts to Manual Groups

1. Navigate to **Leads & Contacts → Contacts**.
2. Locate the contact(s) you want to add to a group and select the checkbox for each on the left side of the list.

Tip

Use filters to identify several contacts with common attributes, then click the checkbox at the left end of the header row to select all the contacts that match your filters.



3. Select **Actions → Organize contacts → Set groups**.
4. In the slide-out panel:
    a. Select the **Add Groups** option.
    b. (optional) If you want to create a new group, enter a name in the **Add a new Group** field and click the **Add New Group** button. The new group is added to the list below.
    c. Check 1 or more boxes in the Groups section to indicate which groups you want to add the contacts to.
    d. (optional) Click the **Notify Shared Users** button to open the Notify Shared Users box. Select which users should be notified about the changes you are making and click the **Save** button.
    e. Click the **Submit** button at the top of the panel.

How to Remove Contacts from Manual Groups

Note

The contact must be associated with at least one group.

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Check the box for each contact you want to remove from a group.
4. Select **Actions → Organize contacts → Set groups**.
5. In the slide-out panel:
    a. Select the **Remove Groups** option.
    b. Check 1 or more boxes in the Groups section to indicate which groups you want to remove the contacts from.
    c. (optional) Click the **Notify Shared Users** button to open the Notify Shared Users box. Select which users should be notified about the changes you are making and click the **Save** button.
    d. Click the **Submit** button at the top of the panel.

How to Edit Groups

Note

You may not be able to update a group depending on your permissions and access. The group must be editable.

1. Navigate to **Leads & Contacts → Groups**.
2. Locate the group you want to edit and select its checkbox on the left side of the list. You can only edit 1 group at a time.
3. Click the **Update Selected** button (pencil icon).
4. In the slide-out panel, make the desired changes to the name, description, and/or filters and click the **Submit** button at the top.

Why Can I Not Edit Some Groups?

Some groups cannot be edited. These groups are called default groups and they are added during the account creation process.

You can tell whether or not you can edit a group by checking the **Editable** column on the Groups list page.

Please reach out to your internal administration team for more information.

How to Delete a Group

Note
You may not be able to delete a group depending on your permissions and access.

Warning
This action cannot be undone!

1. Navigate to **Leads & Contacts → Groups**.
2. Locate the group you want to delete and select its checkbox on the left side of the list. You can only delete 1 group at a time.
3. Click the **Delete Selected** button (trash can icon).
4. In the confirmation box, click the **Ok** button.

Contacts in the group are *not* deleted.

Lead Routes

Note
Routing is only used if a contact comes from a single property website, lead capture app, or lead parsing service.

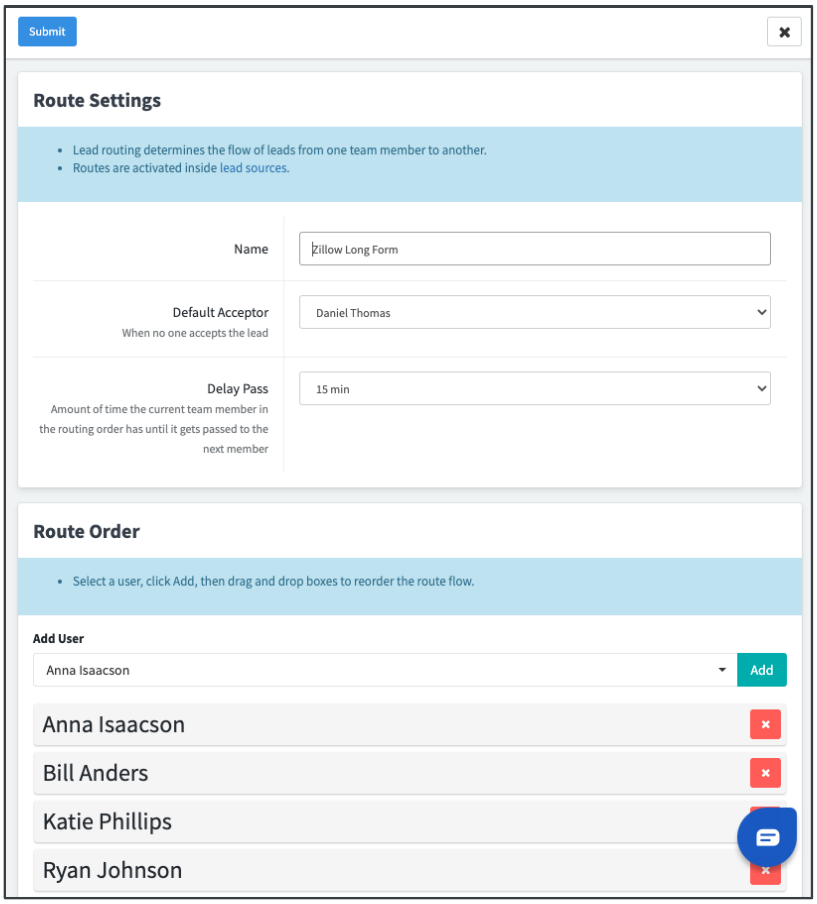
Routing allows you to distribute incoming contacts to other members of your team.

- The route starts with the first user in your route order.
- The next user in line is the first to get notified of the next lead if a lead is accepted.
- If each user in the order has an opportunity to accept the contact, but no one does, the contact is assigned to the route's Default Acceptor.

How to Create a Lead Route

1. Navigate to **Leads & Contacts → Lead Management → Lead Routing**.
2. Click the **+Create** button.

3. In the slide-out panel:
    a. In the **Name** field, enter a suitable name for the route.
    b. In the **Default Acceptor** drop-down list, select a user whom incoming contacts should be assigned to if none of the users in the list accept it.
    c. In the **Delay Pass** field, select a time period. This is the amount of time that a user has to accept a contact once it is offered to them. If no action is taken during this period, the contact is offered to the next user in the list.
    d. In the Route Order section, set the order in which users should be offered a contact.
        i. Select a user in the **Add User** drop-down list and click the **Add** button. The user is added to the list below.
        ii. Repeat until all the users are listed.
        iii. Drag and drop users into the preferred order. The user at the top is offered a contact first.
        iv. Click the **x** button on the right to remove a user from the list.
    e. Click the **Submit** button at the top.



Tip
If you have AT&T as your cellular service, you are notified of a new contact through lead routing, but you still have to accept the contact via email or from your CRM. AT&T services are not compatible with routing notifications.

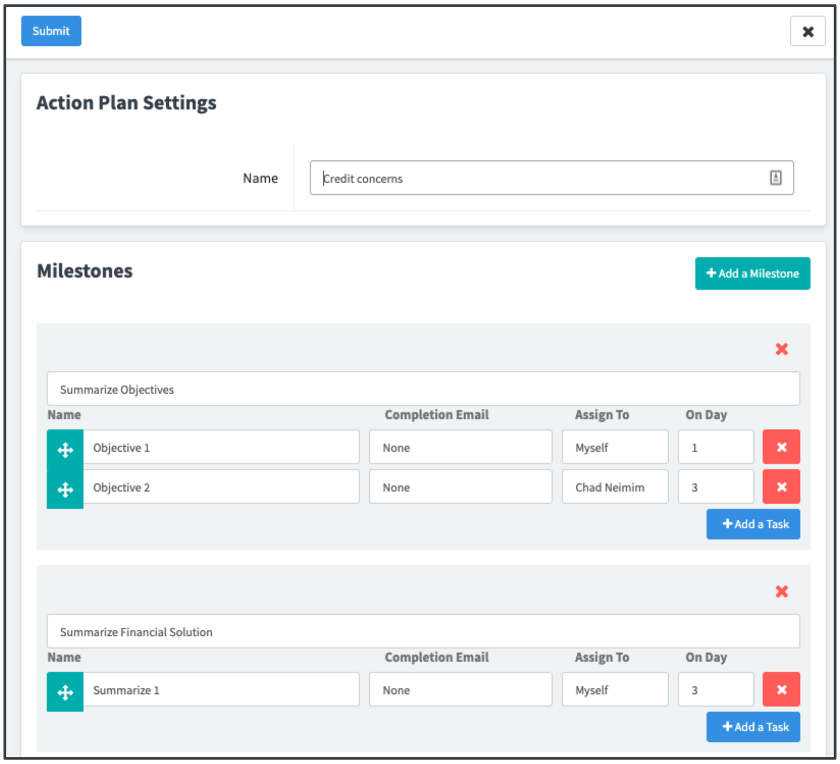
Action Plans

Note
You may not have access to this feature, as it requires a certain organization setting. Please reach out to your internal administration team for more information.

Action plans allow you to save series of tasks that you can then assign to a contact all at once. These plans give you the ability to save and apply standard workflows to new or existing contacts in your contact list. Action plans include any number of milestones, each of which have their own associated tasks.

How to Create Action Plans

1. Navigate to **Leads & Contacts → Lead Management → Action Plans**.
2. Click the **+Create** button.
3. In the slide-out panel:
    a. In the **Name** field, enter a suitable name that you can easily identify in a list.
    b. In the Milestones section, click the **+Add a Milestone** button.
    c. In the **Milestone Name** field, enter a name.
    d. Click the **+Add a Task** button to add a task to the milestone.
    e. In the new row that appears, fill out the following:
        i. **Name** – Enter a name for the task. This will appear in any relevant task lists.
        ii. **Completion Email** – In the drop-down list, select a saved email template. This email will automatically be sent to the contact associated with the action plan when the task is marked complete.
        iii. **Assign To** – In the drop-down list, select which user the task should be assigned to.
        iv. **On Day** – Enter an integer to indicate how many days in the future the task is due. This will be set relative to when the action plan is added to a contact record. For example, if you enter `1`, and the action plan is set on Monday the 1st, the task will be due on Tuesday the 2nd.
    f. Add as many tasks to the milestone as needed.
    g. Add further milestones and associated tasks as needed.
    h. Click the **Submit** button at the top.



How to Assign Action Plans to Contacts

1. Navigate to **Leads & Contacts → Contacts**.
2. Use the search bar to quickly find your contact.
    - Search by name, email, or phone number.
3. Click the name of the contact record you want to add an action plan to.
4. On the contact details page, click the **Tasks** section to expand it.
5. Click the **+ Add Action Plan** button and select the name of the action plan from the drop-down list.
6. The Action Plan page opens. On this page, you can adjust the specific names of the milestones and tasks and the completion email, due date, and assigned user for each task.

Note
Specific due dates are initially given according to the relative number of days in the action plan assignment, but you can adjust them here as needed.

7. Click the **Save Action Plan** button in the upper-left corner.

The various tasks are created and assigned according to the action plan. Each task appears in the Tasks list for each user to whom they are assigned, and the Tasks section of the contact record reflect all the tasks, including the action plan and milestone they are associated with.

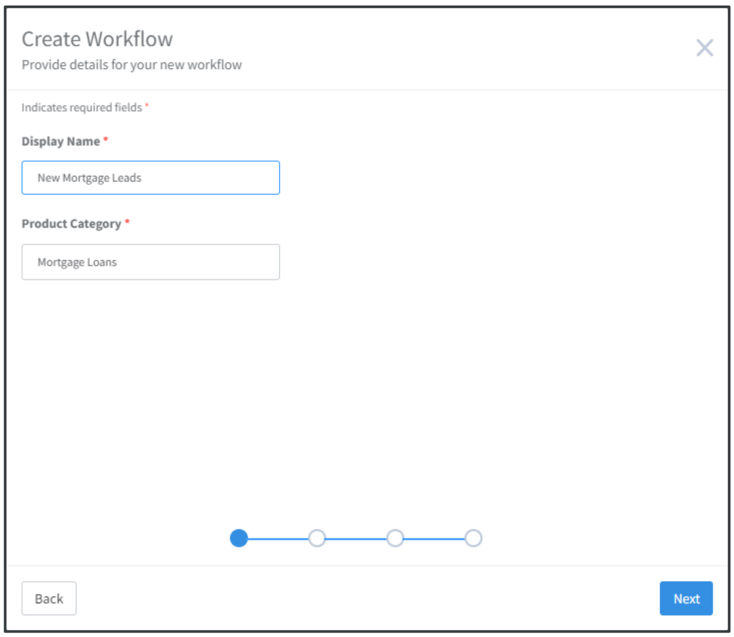
Workflows

A workflow determines what happens when a new lead is created, depending on where that lead originated. Sources are usually third-party services or vendors (such as Zillow Mortgage). Workflows can be used to automate actions in the TE system, such as grouping or sharing contacts, triggering journeys, and so on.

Note
Remember that a lead represents a specific opportunity associated with a contact. A single contact record might have multiple leads associated with it.

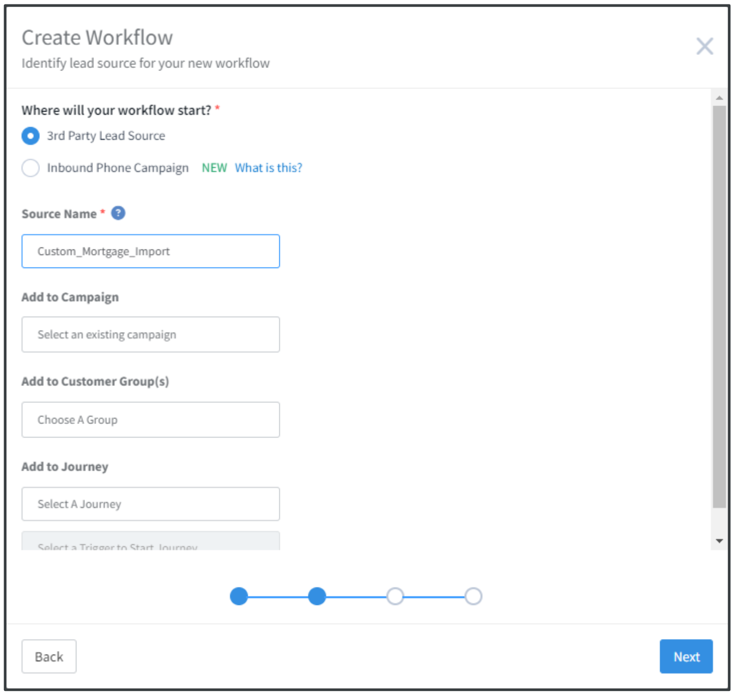
How to Create a Workflow

1. Navigate to **Leads & Contacts → Lead Management → Workflows**.
2. Click the **+ Create Workflow** button.
3. On the first screen of the Create Workflow box:
    a. In the **Display Name** field, enter a name for the workflow. This name is used throughout the platform when referencing the workflow.
    b. In the **Product Category** drop-down list, select a relevant category that would apply for all leads to be sent along this workflow.
    c. Click the **Next** button.

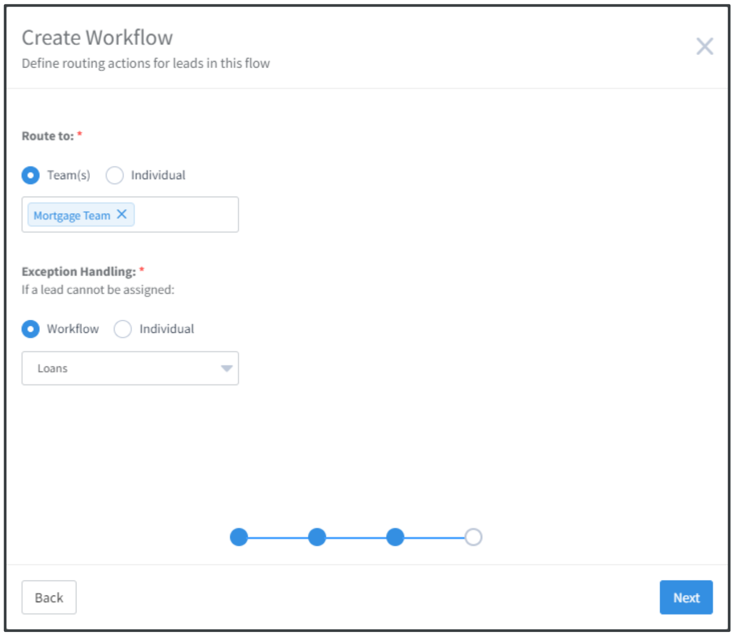


4. On the second screen:
    a. In the **Where will your workflow start?** option, select either:
        i. **3rd Party Lead Source** – Select this option to monitor leads associated with a selected lead source. This is used most often.
        ii. **Inbound Phone Campaign** – Select this option to monitor leads captured by calls to a specified, custom phone number. Select an area code below and move on to the next screen. The rest of this section's instructions assume you selected 3rd Party Lead Source.
    b. In the **Source Name** field, enter the *exact* name of the source used in either a flat file or API import.
    c. (optional) In the **Add to Campaign** drop-down list, select 1 or more drip campaigns that these leads should be added to.
    d. (optional) In the **Add to Customer Group(s)** drop-down list, select 1 or more groups that the contact associated with these leads should be added to.

e. (optional) In the **Add to Journey** drop-down list, select 1 journey that these leads should be added to. If you make a selection here, you must also select a trigger from that journey in the second drop-down list.
f. Click the **Next** button.



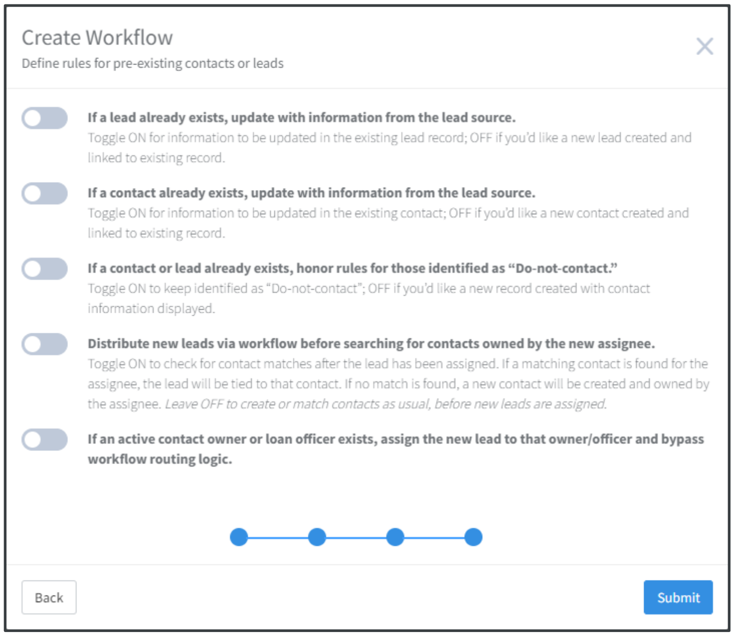
5. On the third screen:
   a. Under Route to, select how the leads should be routed:
      i. **Team(s)** – Select 1 or more teams whose members should share the leads.
      ii. **Individual** – Select 1 person who should receive all the leads. Once you select a user, move on to the next screen. The rest of this section's instructions assume you selected Team(s).
   b. Under Exception Handling, select what happens if no user in the team(s) you selected are able to claim a lead for whatever reason:
      i. **Workflow** – Select a secondary workflow that will use its own rules to attempt to assign the unclaimed leads from this workflow.
      ii. **Individual** – Select a single user who will be assigned all the unclaimed leads from this workflow.
   c. Click the **Next** button.



6. On the fourth and final screen, click the following optional toggle switches on or off to determine behavior of potential duplicates:
    a. **If a lead already exists, update with information from the lead source.**
        i. If this is switched on, the existing lead will be updated. Select the field(s) that can be overwritten using the checkboxes that appear.
        ii. If this is switched off, a new lead will be created and linked.
    b. **If a contact already exists, update with information from the lead source.**
        i. If this is switched on, the existing contact will be updated. Select the field(s) that can be overwritten using the checkboxes that appear.
        ii. If this is switched off, a new contact will be created and linked.
    c. **If a contact or lead already exists, honor rules for those identified as "Do-not-contact."**
        i. If this is switched on, the existing contact's DNC status will be enforced. Select which contact information can still be displayed using the checkboxes that appear.
        ii. If this is switched off, a new record will be created and can be contacted.
    d. **Distribute new leads via workflow before searching for contacts owned by the new assignee.**
        i. If this is switched on and a matching contact record is found in the assignee's account, the new lead will be associated with that record.
        ii. If this is switched on and no match is found, a new contact record will be created as usual.
        iii. If this is switched off, matches are searched, and connections are made to existing records *before* the lead is assigned.
    e. **If an active contact owner or loan officer exists, assign the new lead to that owner/officer and bypass workflow routing logic.**
        i. If this is switched on and a matching contact record is found, the Team(s)/Individual selection above is ignored, and the new lead is assigned to the owner of the existing contact record.
        ii. If this is switched off, the defined routing is always used.

Note
The last 2 options cannot both be switched on at the same time. If either is switched on, the other is locked in the off position.

f. Click the **Submit** button.



The workflow is created. If you selected Team(s) as the routing method, you are prompted to view the workflow canvas by clicking the **View Workflow** button or to return to the list page by clicking **Not Right Now**. If you choose not to view the canvas now, you can do so later (see How to Add Filters to a Workflow Using the Canvas below).

Note
The canvas provides a visual representation of a workflow that distributes leads among multiple users. It also provides additional tools for fine-tuning the distribution. Therefore, if you selected Individual as the routing method, the canvas is not used.

How to Add Filters to a Workflow Using the Canvas

1. Navigate to **Leads & Contacts → Lead Management → Workflows**.
2. For a workflow that does not use routing to a single individual, either:
   a. Click the name of the workflow in the list and click the **View workflow canvas** button in the slide-out panel
   b. Selecting **Actions → View Workflow** on the right side of the page.

   The canvas opens with the distribution setup for that workflow shown. All the users for the team(s) you defined in the workflow are shown as equal branches descending from the lead source.
3. Use the scroll wheel on your mouse to zoom in and out.
4. Click and drag to move the workflow around the canvas.
5. Hover the mouse pointer over a vertical segment—either just below the source before branching occurs or just above an individual user—and click the **[+]** button that appears.

a. In the pop-up box that appears, either click a button for a suggested action or select any available action from the drop-down list.
b. Select any other necessary parameters for your selected action to complete the filter. When a new lead flows down this workflow, the lead is assigned to the next user in the workflow who matches the filter.
c. (optional) check the **Required** box to enforce matching the filter.
    i. If this is checked and no user matches, the exception handling rule is used.
    ii. If this is unchecked and no user matches, the lead is assigned to the next user in sequence.
d. Click the **Save** button.

6. The filter is shown as a box on the line you selected. You can modify or remove the filter by hovering the mouse pointer over the box and clicking either the **Edit** or **Delete** button.
7. When you are finished setting up the desired filters, click the **Save** button in the upper-right corner of the page.
8. Click the name of the workflow in the upper-left corner of the page to close the canvas.

How to Modify Routing Settings for a Workflow from the Canvas

1. Navigate to **Leads & Contacts → Lead Management → Workflows**.
2. For a workflow that does not use routing to a single individual, either:
    a. Click the name of the workflow in the list and click the **View workflow canvas** button in the slide-out panel
    b. Selecting **Actions → View Workflow** on the right side of the page.

    The canvas opens with the distribution setup for that workflow shown
3. Click the **settings** button (gear icon) in the upper-right corner of the page.
4. A slide-out panel with the current settings opens. Click the **Edit** button at the top of the panel.
5. Click the **Distribution** section to expand it.
    a. The **Sequential** option is selected by default. This means each lead will be assigned to the next user in the workflow who meets the filtering settings.
    b. Select the **Simultaneous** option to create a competitive scenario. Each user in the workflow who meets the filtering settings is given the opportunity to claim the new lead. The first user who does so wins the assignment.
6. Click the **Contact Settings** section to expand it.
    a. Check the **Time to Contact** option to require that the assigned user contacts the lead within a certain time or else they will lose the lead.
        i. Set the number and unit to determine how long the assignee has to contact the lead before losing the assignment.
        ii. Select the option that determines what happens if the assignee does not act in time. The lead can be assigned to the next user in the workflow or according to the exception handling defined for the workflow.
    b. Check the **Updates to "Contacted Date"** option to determine which types of communication with the lead will be allowed to update the timestamp on the lead record. You must select at least 1 of the available options below for this to work.
7. Click the **Save** button in the upper-right corner of the panel.
8. Click the name of the workflow in the upper-left corner of the page to close the canvas.

How to Update Workflow Settings

1. Navigate to **Leads & Contacts → Lead Management → Workflows**.
2. Locate the workflow you want to modify and select **Actions → Edit** on the right side of the page.
3. There are 4 expandable sections that correspond to the 4 parts of the Create Workflow box. Expand each section and adjust the parameters as desired.
4. Click the **Submit** button.

Note
Once a workflow has been created, you cannot change the Where will your workflow start?, Source Name, Route to, and Exception Handling options.

How to Manually Create Leads

1. Navigate to **Leads & Contacts → Leads**.
2. Click the **+ Create Lead** button.
3. In the Create Lead box:
    a. Enter the lead's name in the **Lead First Name** and **Lead First Name** fields.
    b. For the **Route to:** option, select either:
        i. **Lead Source** – Select a workflow in the drop-down list that appears.
        ii. **Individual** – Select a specific user in the drop-down list that appears.
    c. In the **Email** field, enter the lead's email address.
    d. (optional) In the **Add to Group** drop-down list, select 1 or more groups that the associated contact should be added to.
    e. In the **Cell Phone** field, enter the lead's cell phone number.
    f. Click the **Create Lead** button.