User Guide

This document contains important information for ConnectLeader users.
Please ensure that it is distributed among all applicable parties.

Disclaimer

The information in this document is subject to change without notice due to continuous improvements/enhancements to the product; therefore, it should be used as a guide only. In addition, the Admin/Manager/Users names used in this document are fictitious.

Table of Contents

About this Guide

The purpose of this guide is to familiarize users with the '**TruCadence**' module. It is intended to detail the features of this module for **users**.

Chapter 1 – Log In / Log Off

This chapter covers the following topics:

- Log into ConnectLeader
- Log off from ConnectLeader

Log into ConnectLeader

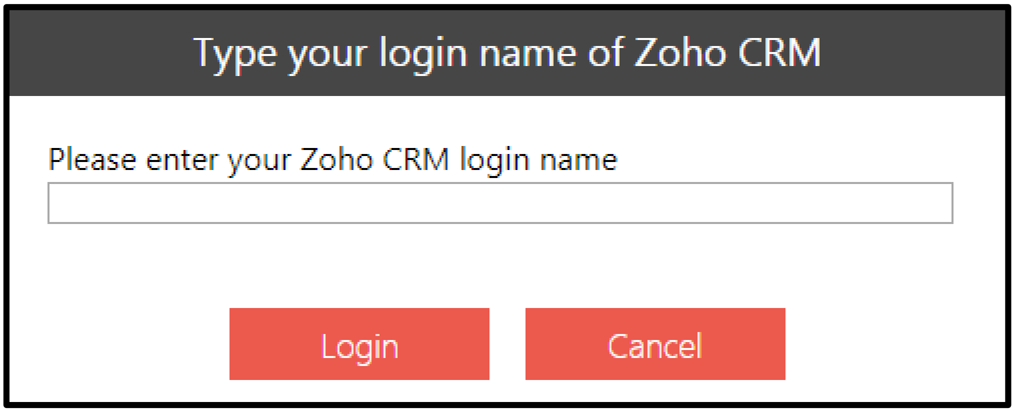
Pre-requisites

ConnectLeader requires users to have Zoho login credentials, in order to log into the ConnectLeader portal.

To log into the ConnectLeader portal through **Zoho**:

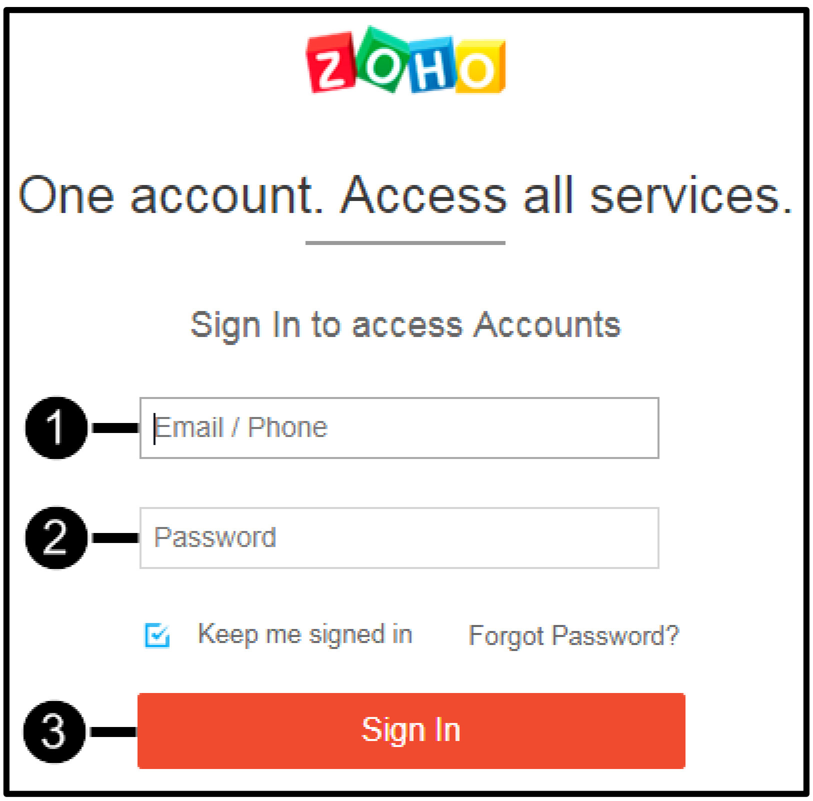
1. Go to the link provided by ConnectLeader to bring up the ConnectLeader home page.

2. Click on the Zoho logo to continue. This will bring up the Zoho login screen.



3. Enter your Zoho **login name** (i.e. User name) into the text field and click on the **Login** button.

4. This will direct you to the Zoho authentication page.



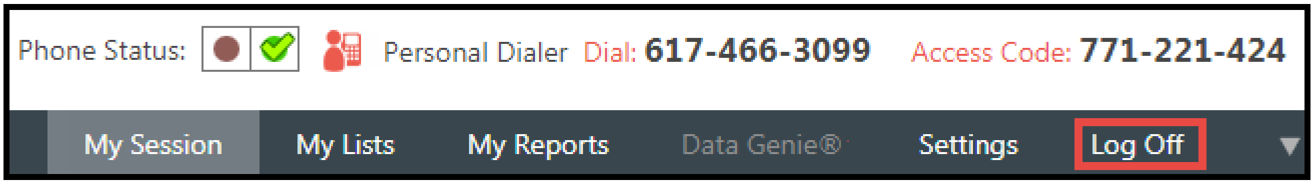
1 Enter your **Email/Phone** number to login.

2 Enter your Zoho **Password**.

3 Click on the **Sign In** button to authenticate the login credentials. After successful authentication, you will be directed to the **ConnectLeader** portal**.**

Log Off of ConnectLeader

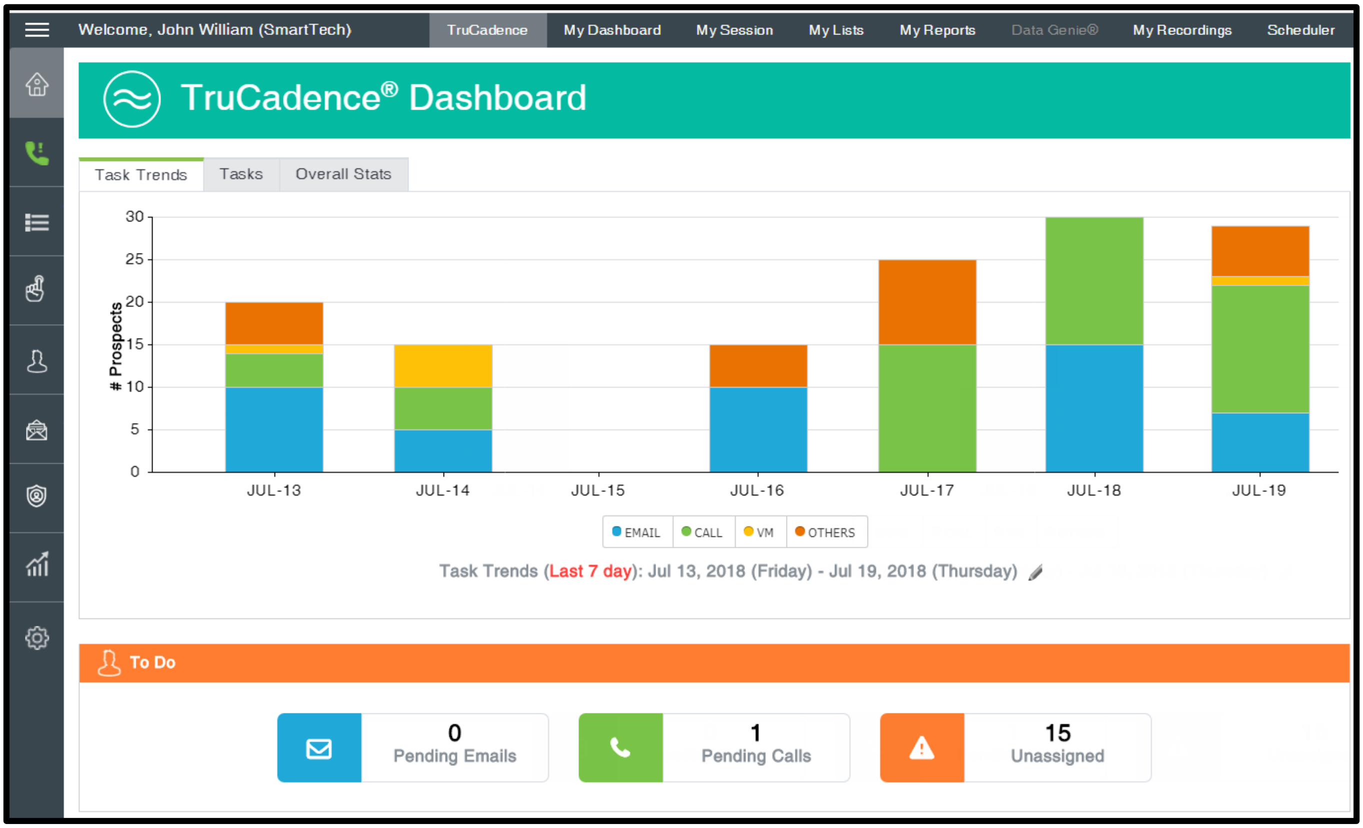
Once you have completed the activity, you can logout from the ConnectLeader portal by clicking the **Log Off** button, as shown below:



When the **Log Off** button is clicked, you will be disconnected from the Phone Bridge as well as the ConnectLeader portal and redirected to the ConnectLeader home page.

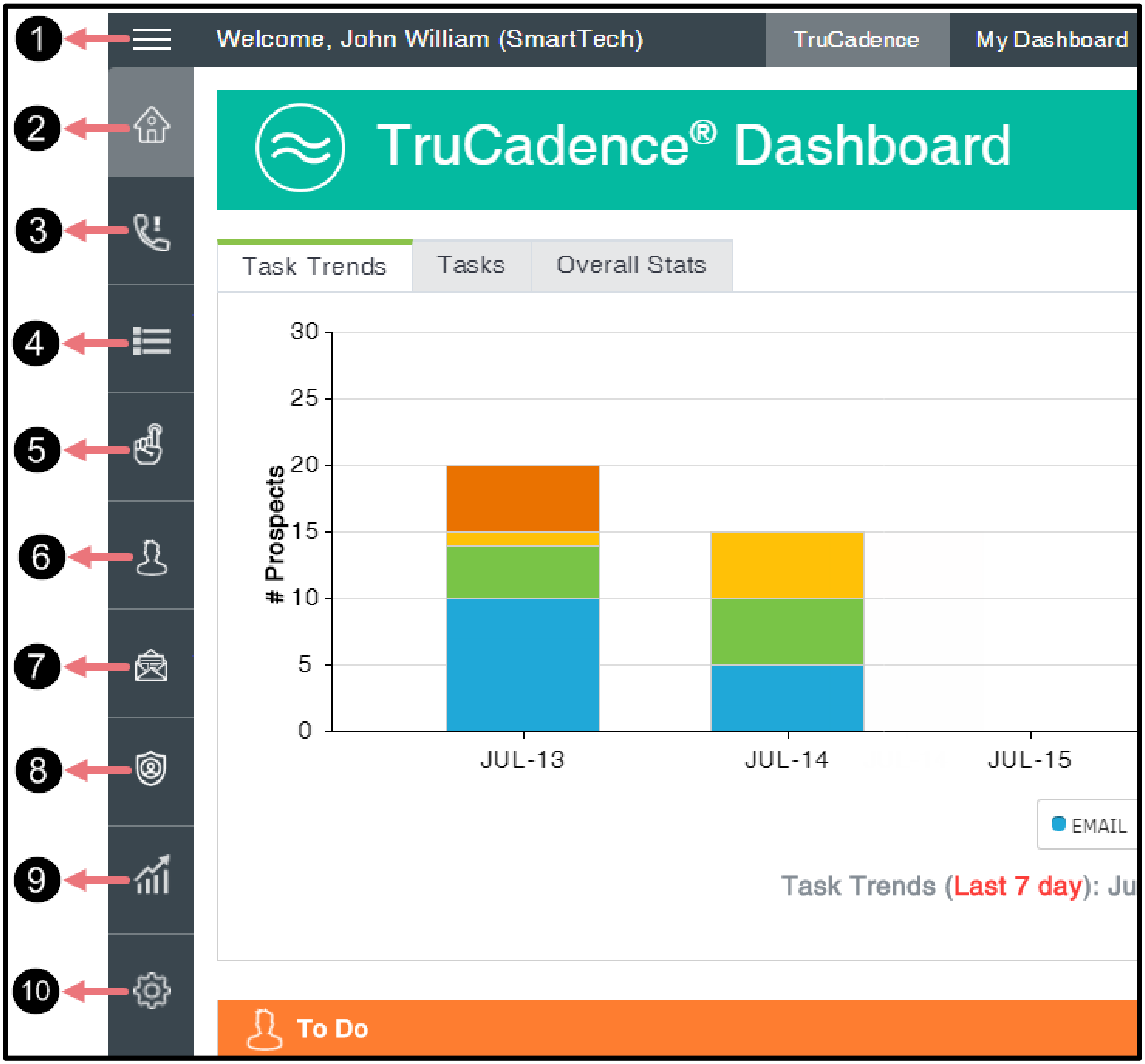
Chapter 2 – TruCadence

Once you have logged in, you will be directed to the ConnectLeader portal '**My Session**' tab. Click on the **TruCadence** tab to navigate to the **TruCadence** module. The TruCadence home page will be displayed.

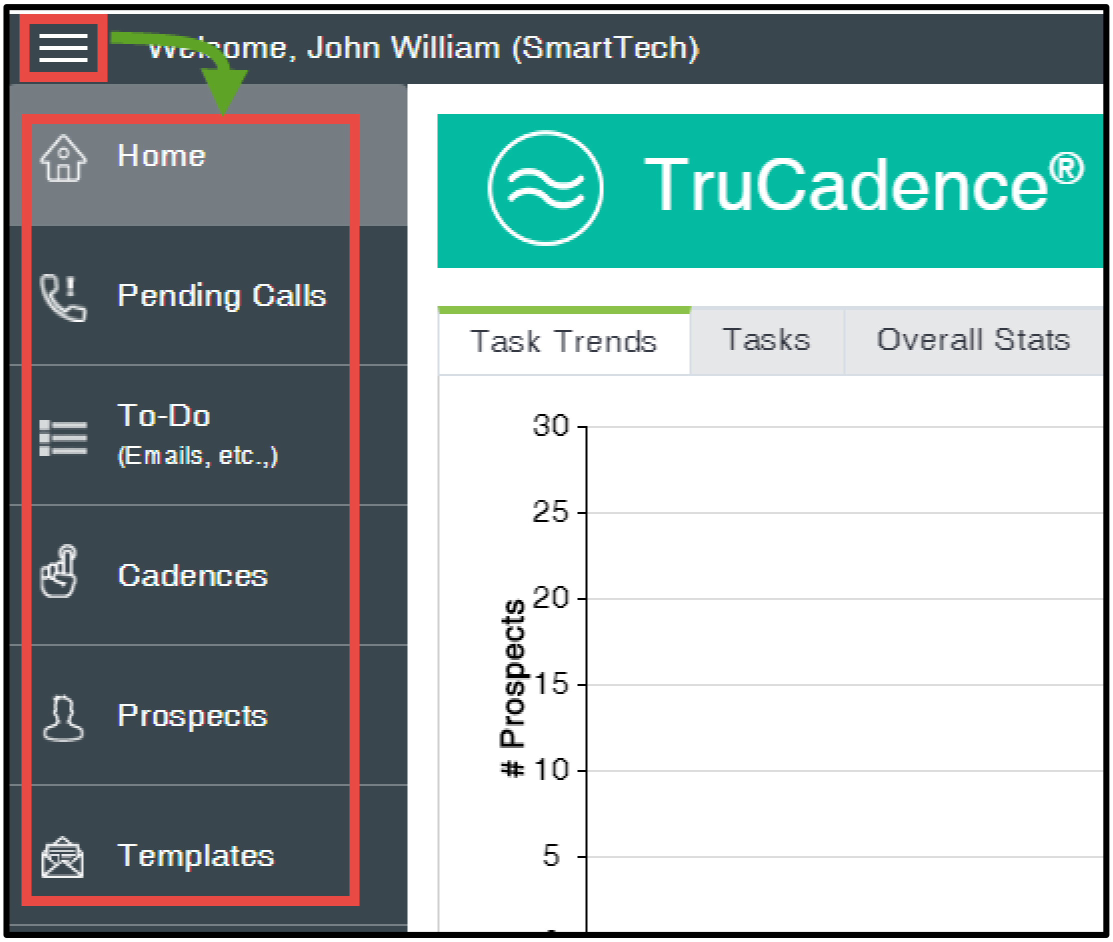


TruCadence has seven tabs:

- Home
- Pending Calls
- To-Do
- Cadences
- Prospects
- Email Templates
- Accounts
- Reports
- Settings



1  Click to this icon expand or collapse the TruCadence tabs. While expanding, you can view the complete name of the **Tabs**, as shown below:



2 ‘**Home**’ is the default-landing tab in TruCadence. It shows the user’s dashboard. There are three tabs with a different data under each:

- **Task Trends** – A bar chart which shows the combined view of the number of Touches (Call, Email, Call & VM and Other) performed/completed by the logged-in user for the current week.
- **Tasks –** A bar chart which shows the total number of prospects completed in each touch (separately) for the current month.
- **Overall Stats –** Displays the overall statistics of each Touch Type, Outcome of each Touch Type and the number of prospects who meet the respective touch outcomes, for the logged-in user during the current month.

3 **Pending Calls –** The prospects which have been added to a cadence and are in current call touch, will be listed here. You will need to initiate a dialing session manually via any of the ConnectLeader dialers that you have licensed in order to call on these prospects.

4 **To Do** – Displays pending emails that must be sent manually as well as displays prospects which current touch is **Other Touch.**

5 **Cadences –** List of Cadences created by the logged-in user and all cadences shared with them (shared by the managers/admin).

Here, you can create a new Cadence, add touches to a Cadence, edit, view and delete a Cadence.

6 **Prospects –** Here, you can import prospects (from a CRM or from a CSV File), assign prospects to a Cadence, view each prospects information, move prospects from one Cadence to another, exit prospect(s) from a Cadence and delete prospects from TruCadence.

7 **Email Templates** – Tab to define Email Templates that can be used for Email Touch.

8 **Accounts** – In the Accounts tab, prospects imported from a CRM or from a CSV file are grouped by Domain Name & Account Name. You can see the number of prospects under each account name/domain name.

9 **Reports** – Tab to view the activities performed on your own cadences. Also, you can view the reports in a **Bar Chart**:

10 **Settings –** Here, you can configure the basic settings for Email communication and Email Signature which is used for **Email Touch**.

Chapter 3 – Home tab

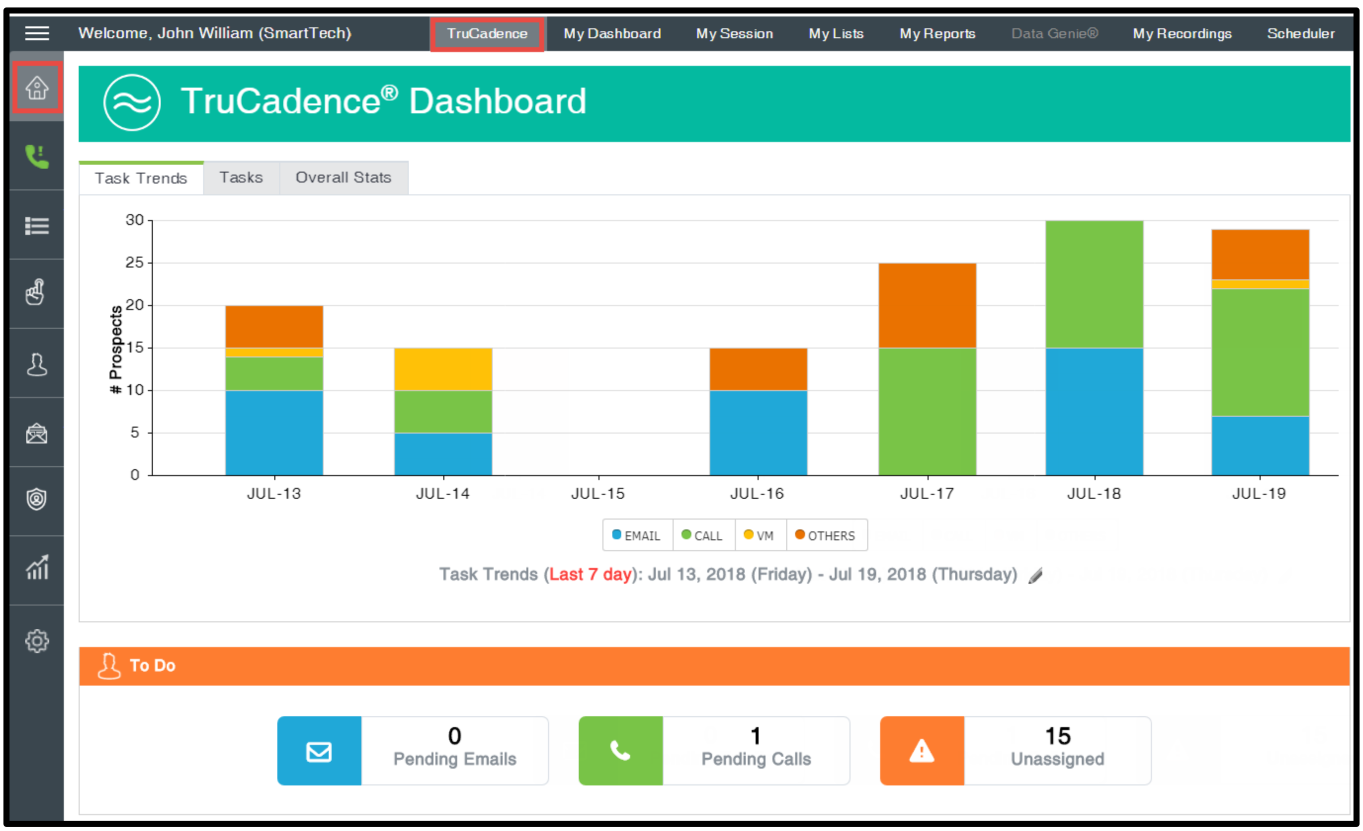
This chapter covers the following topics:

- Task Trends
- Tasks
- Overall Stats

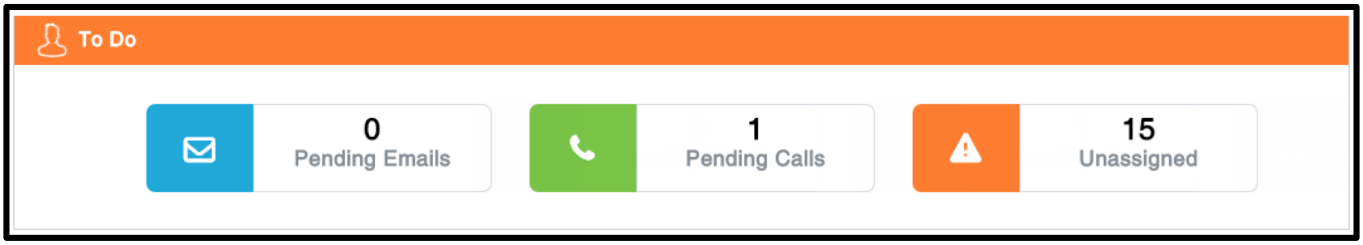
In the **Home** tab, you can view the **TruCadence Dashboard** that provides charts to help understand the following information:

- Total number of Touches processed in current week
- Total number of prospects processed under each Touch
- Overall Stats of the logged-in user
- Total number of pending Emails, pending Calls and unassigned prospects

Navigation	TruCadence ► Home tab



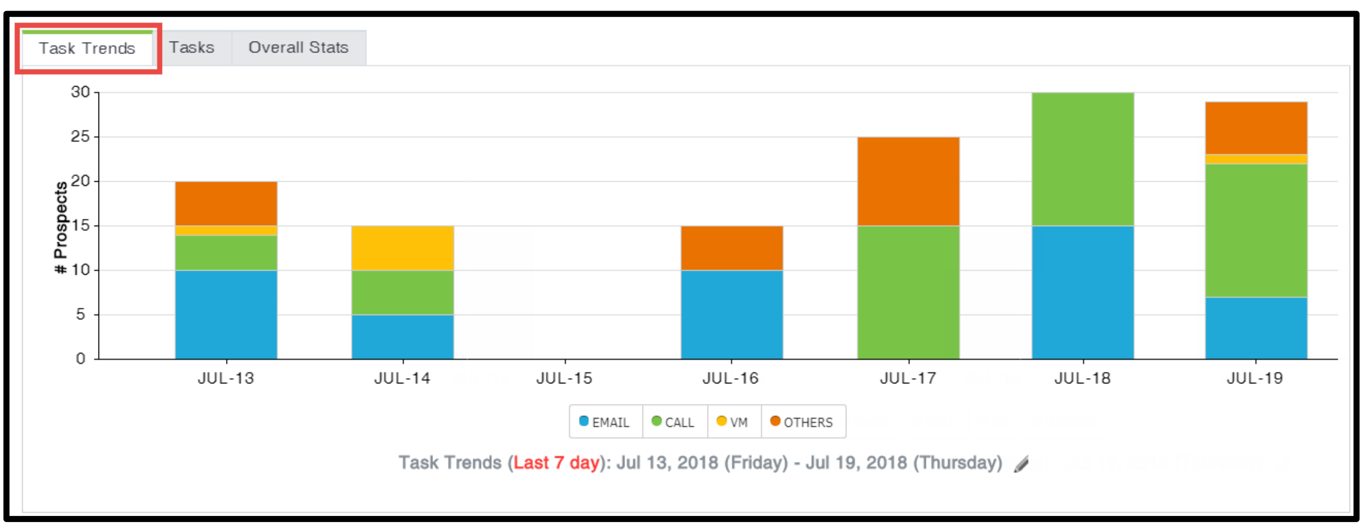
Under the **To Do** section (below the chart), you can view the total number of pending Emails, pending Calls and unassigned prospects.



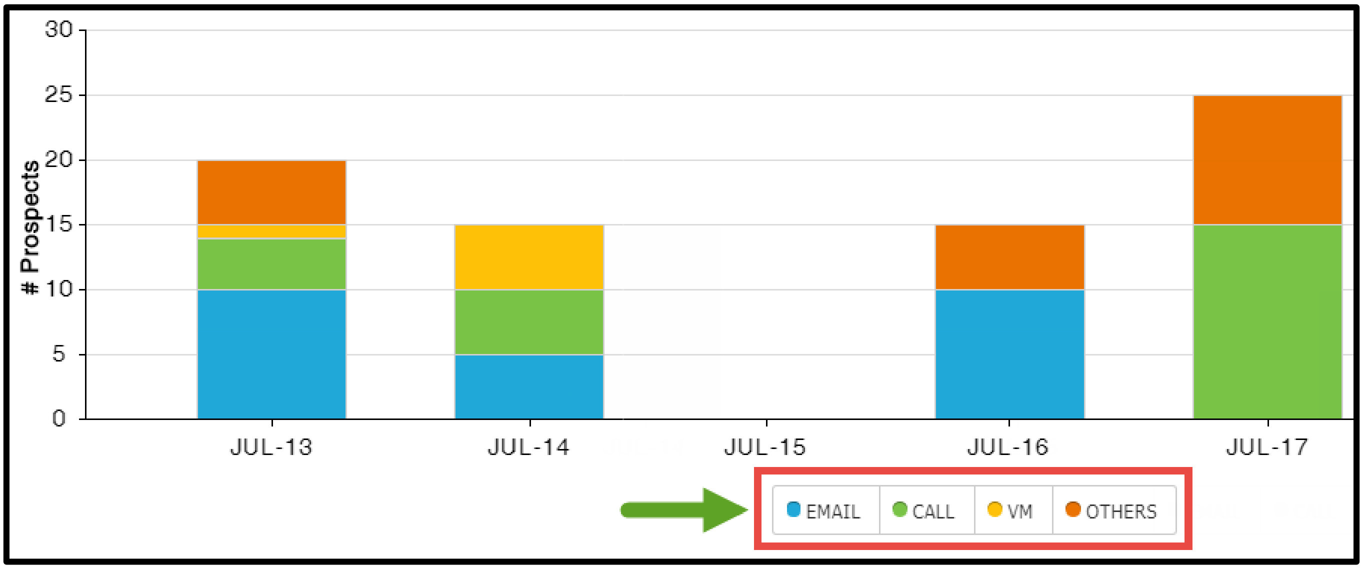
- **Pending Emails** – When clicking this button, the application will redirect to the **To-Do** tab to show the pending emails
- **Pending Calls** – When clicking this button, the application will redirect to the **Pending Calls** tab to show the pending calls
- **Unassigned** – When clicking this button, the application will redirect to the **Prospects** tab to show the unassigned prospects

3.1 Task Trends

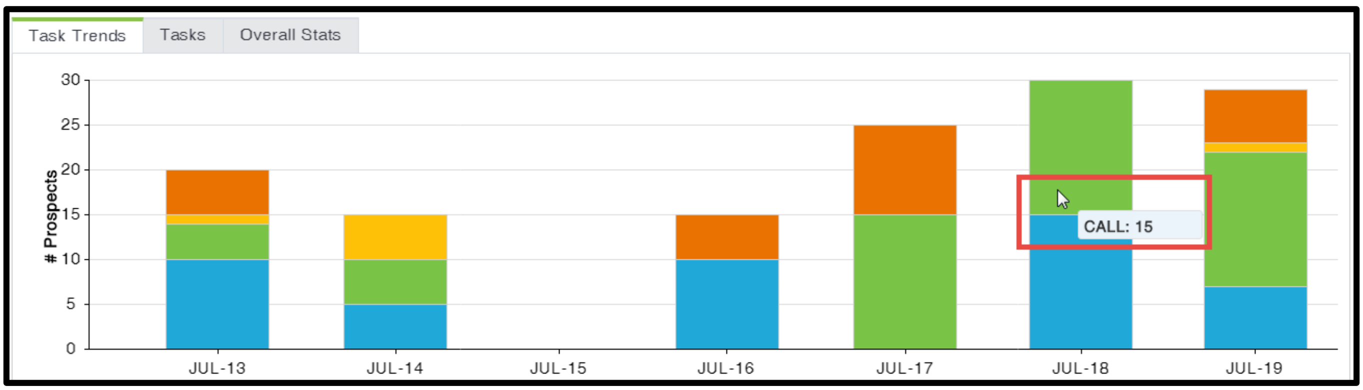
When clicking the **Home** tab, the default-landing page is **Task Trends**, where the combined view of the number of Touches (Call, Email, Call & VM and Other) performed/completed by the logged-in user in the last 7 days will be displayed.



Under the **Task Trends** chart, you can see the **color legends** to understand what the colors in the chart mean. Using this, you can customize and view the specific touch(es) in the chart. For example, if you wish to view only the **Email** & **Call** touches in the chart, then deselect the **VM** & **Others** legends.

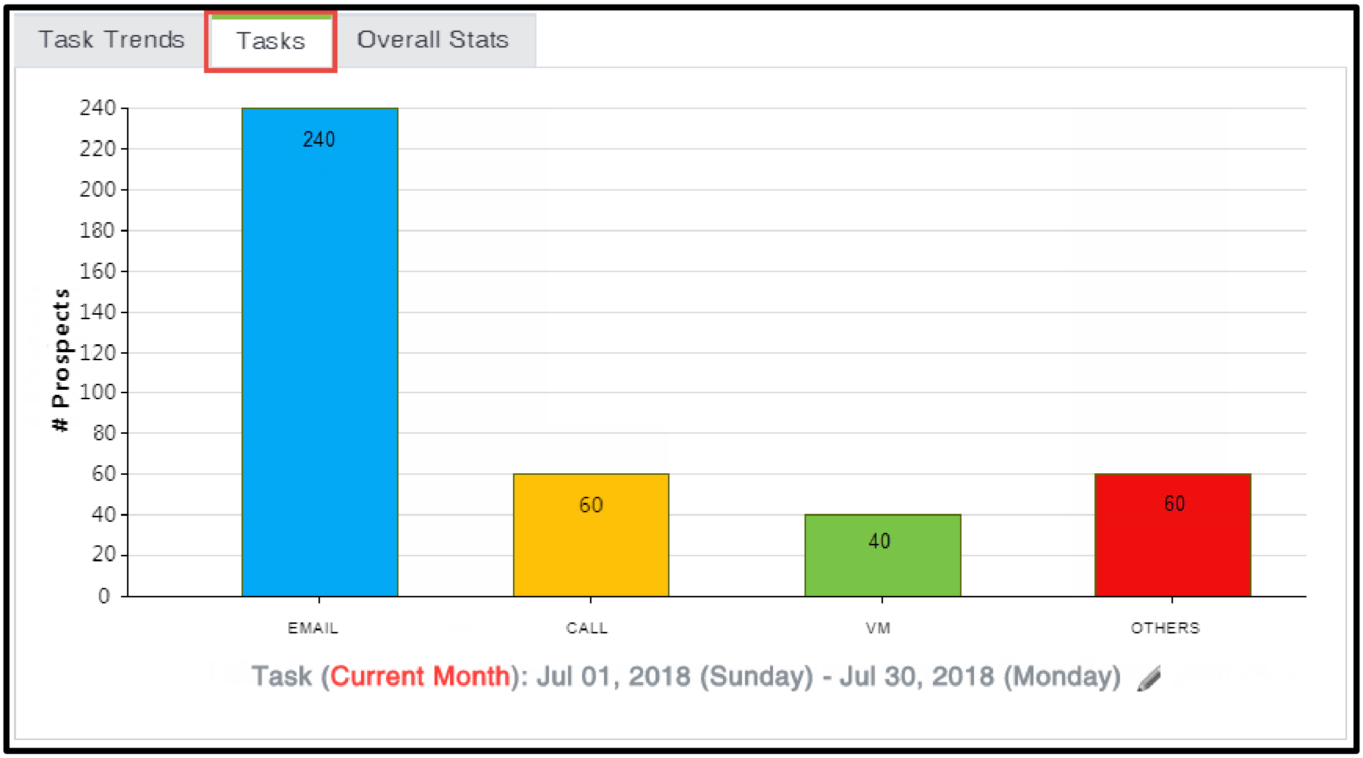


Also, you can view the number of touches processed, by simply hovering the mouse on the respective touches, as shown below:



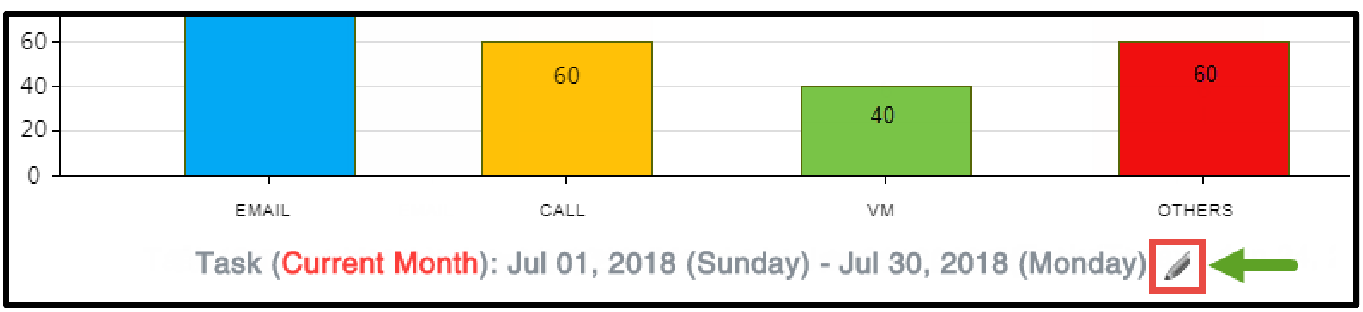
3.2 Tasks

In the **Tasks** tab, you can view the total number of prospects completed on each touch (separately) for the current month.



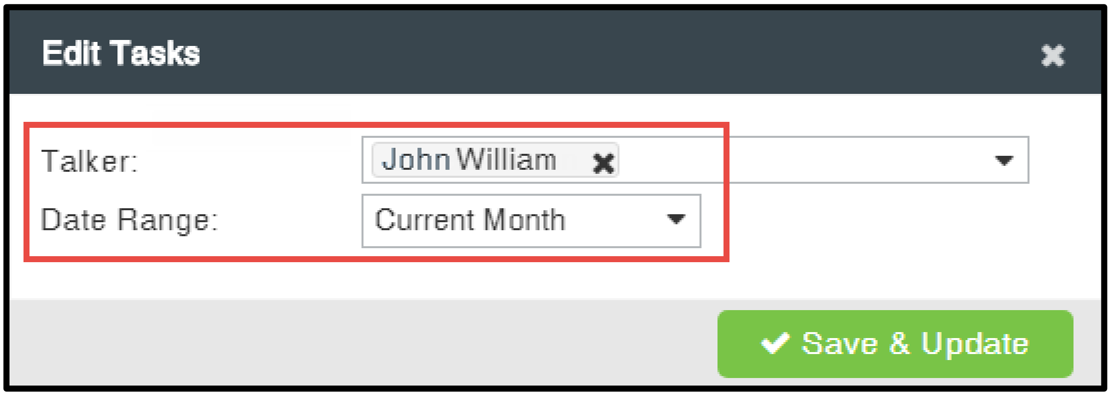
If required, you can modify the date range and view the **Tasks**, by following the steps below:

1. In **Home ► Tasks** tab, click on the **Edit** icon next to the **chart title** displaying the date range, as shown below:

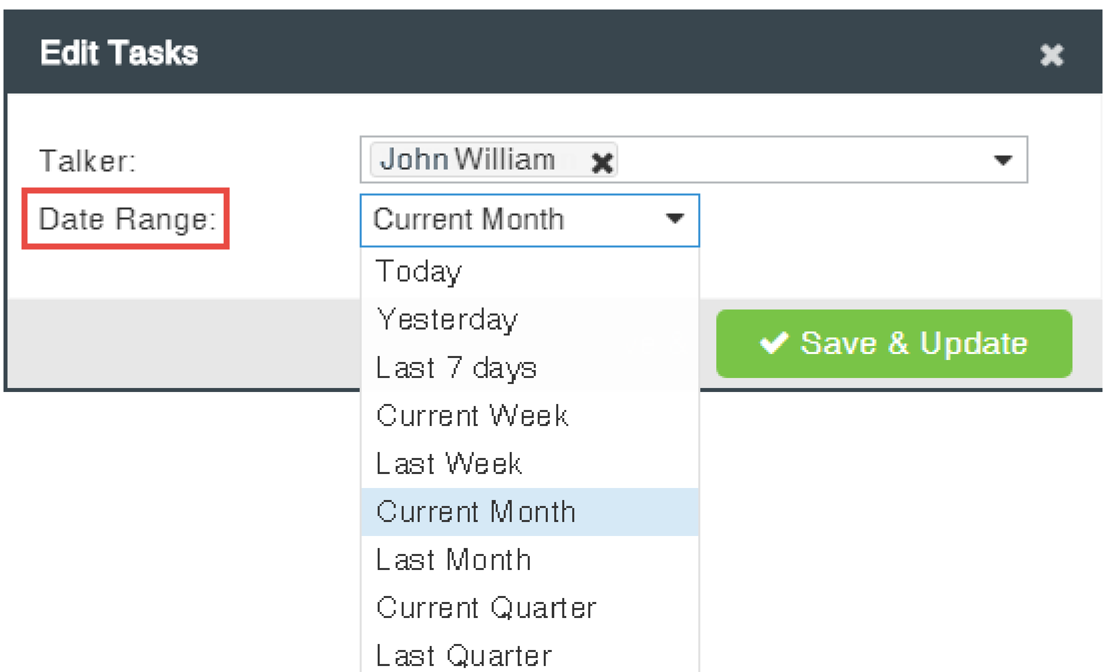


2. The **Edit Tasks** popup window will be displayed.

3. By default, the logged-in user name will be displayed in the **Talker** dropdown and the **Date Range** will be **Current Month**.



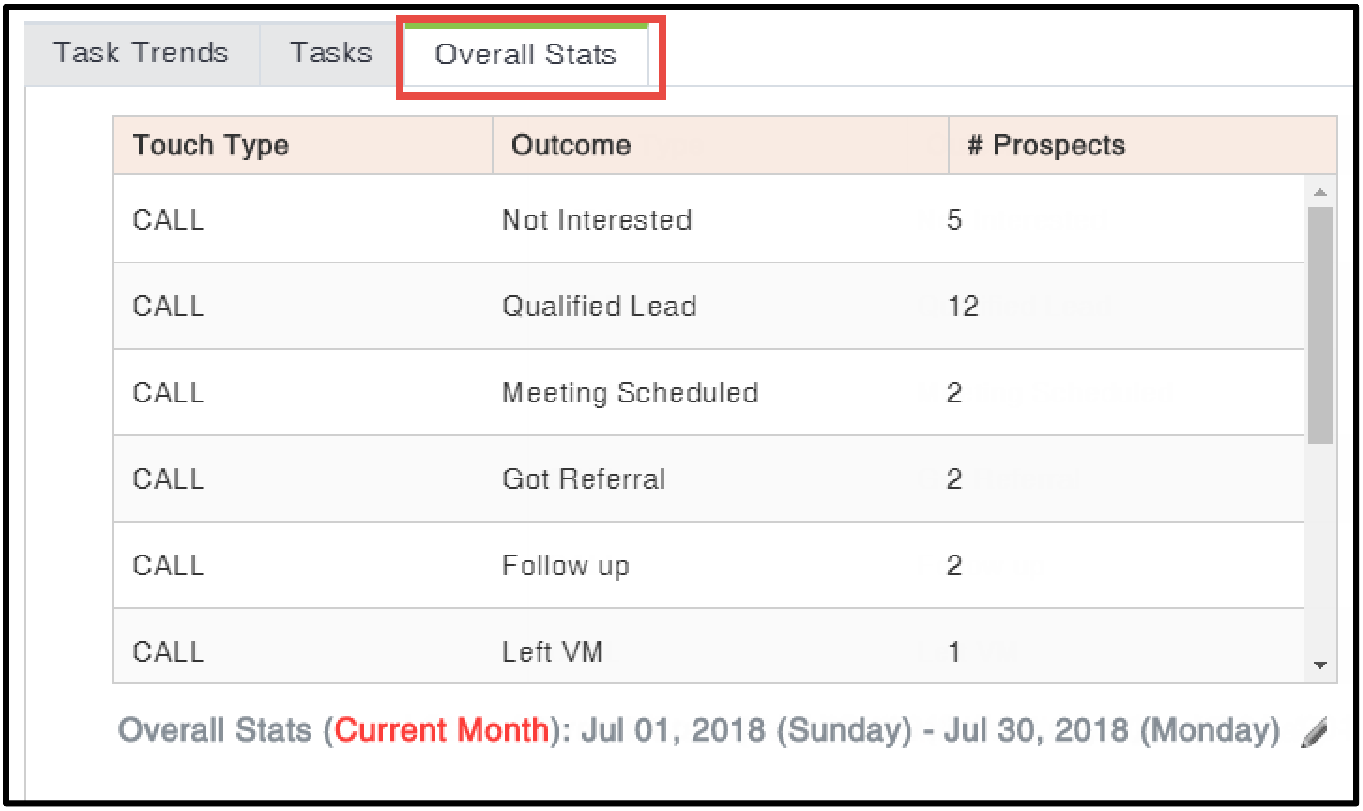
4. Select the required **date range** from the dropdown to view the **Tasks** chart during the date range selected.



5. Click the **Save & Update** button to save the changes and to update the chart accordingly.

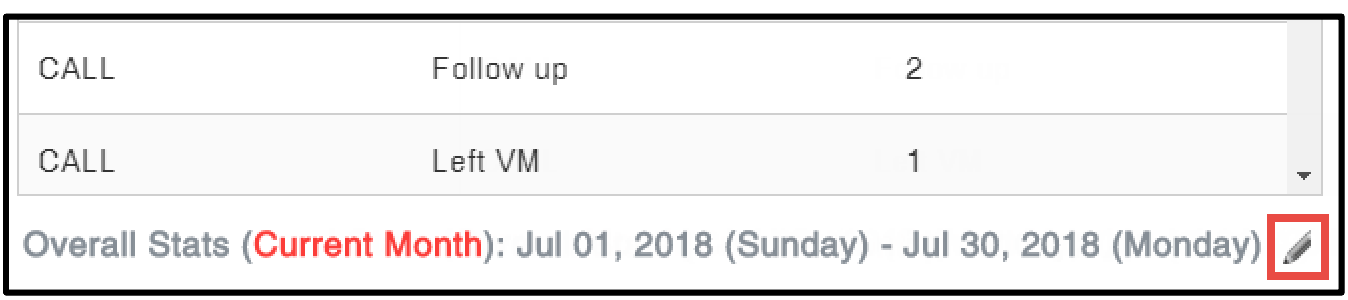
3.3 Overall Stats

In the **Overall Stats** tab, you can view the table showing the overall statistics of Touch Types, Outcome of each Touch Type and the number of prospects who meet the respective touch outcome, for the logged-in user during the current month.



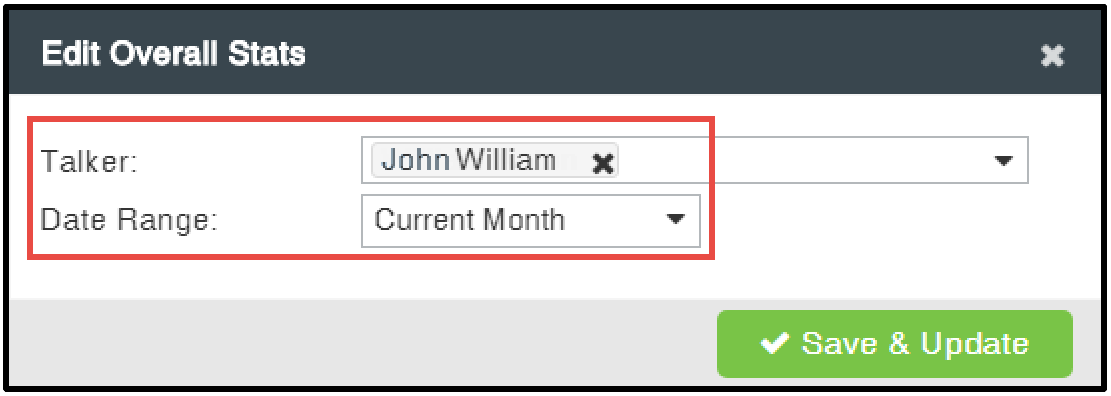
If needed, you can modify the date range and view the **Overall Stats** by following the steps below:

1. In **Home** ► **Overall Stats** tab, click on the **Edit** icon next to the **table title** displaying the date range, as shown below:

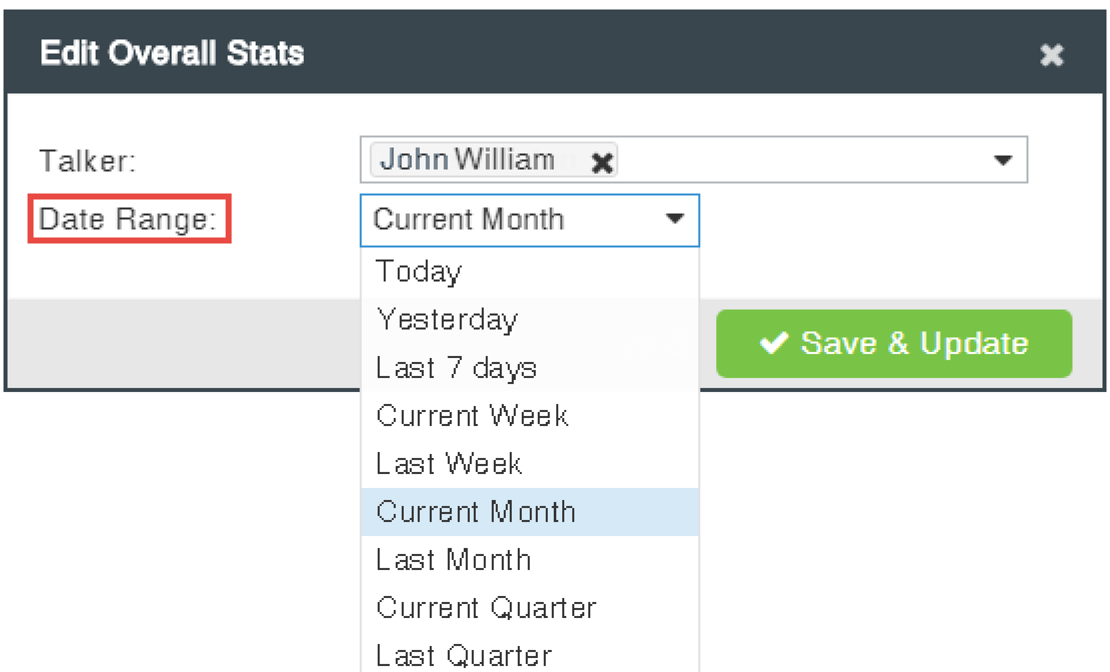


2. The **Edit Overall Stats** popup window will be displayed.

3. By default, the logged-in user name will be displayed in the **Talker** dropdown and the **Date Range** will be **Current Month**.



4. Select the required **date range** from the dropdown to view the **Overall Stats** table during the date range selected.



5. Click the **Save & Update** button to save the changes and to update the table accordingly.

Chapter 4 – Cadences Tab

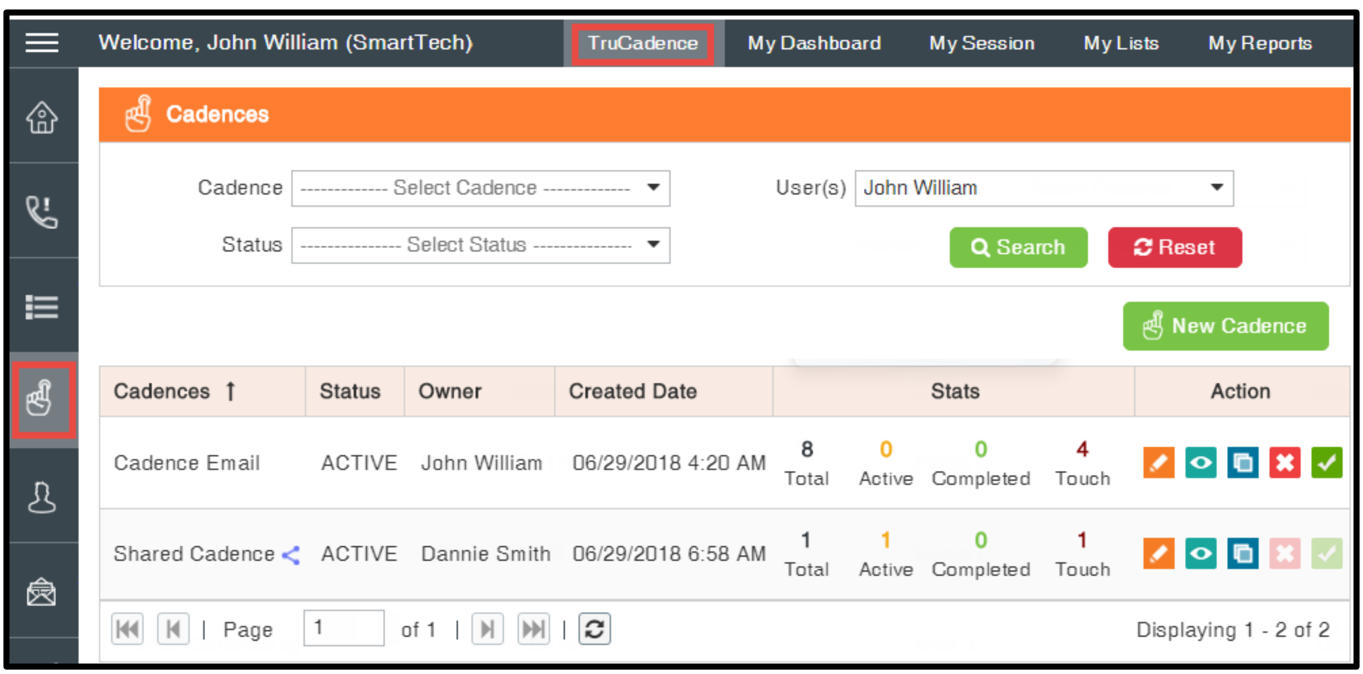
This chapter covers the following topics:

- Create a new Cadence
- Add new Touches
- Edit a Touch
- Delete a Touch
- Edit a Cadence
- View Cadence
- Delete a Cadence
- Shared Cadence

The **Cadences** tab is used to create a new Cadence, add touches to a Cadence, clone, edit, view and delete a Cadence.

Navigation	TruCadence ► Cadences tab

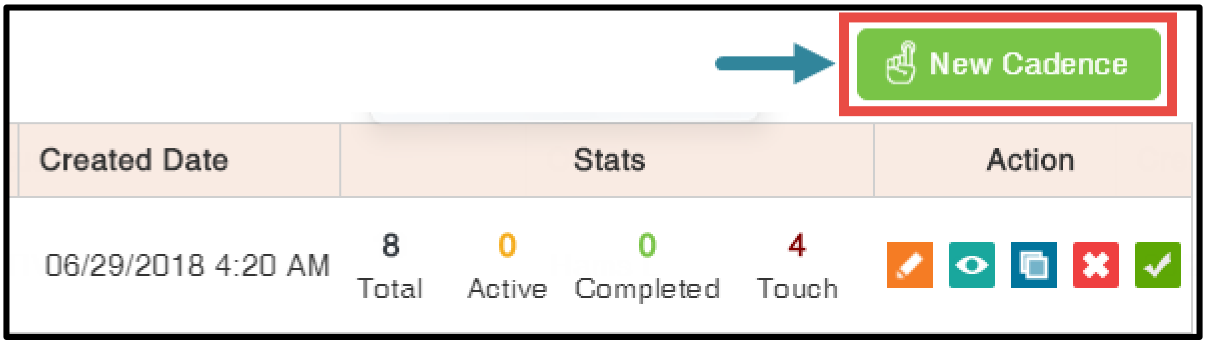
Cadences created by the logged in user, the shared cadences (shared by the managers/admin) and the stats of each cadences will be listed in the Cadences tab.



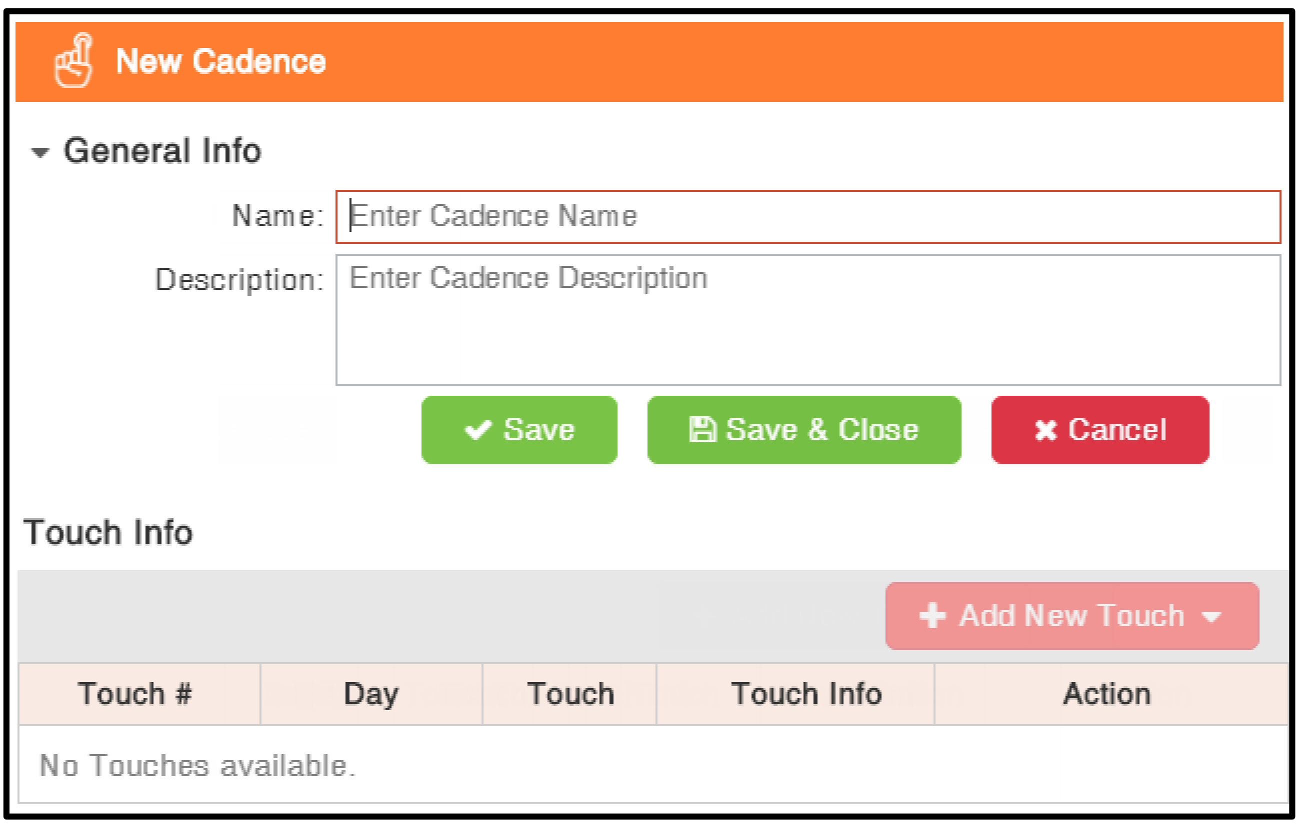
4.1 Create a new Cadence

Find the steps below to create a new Cadence:

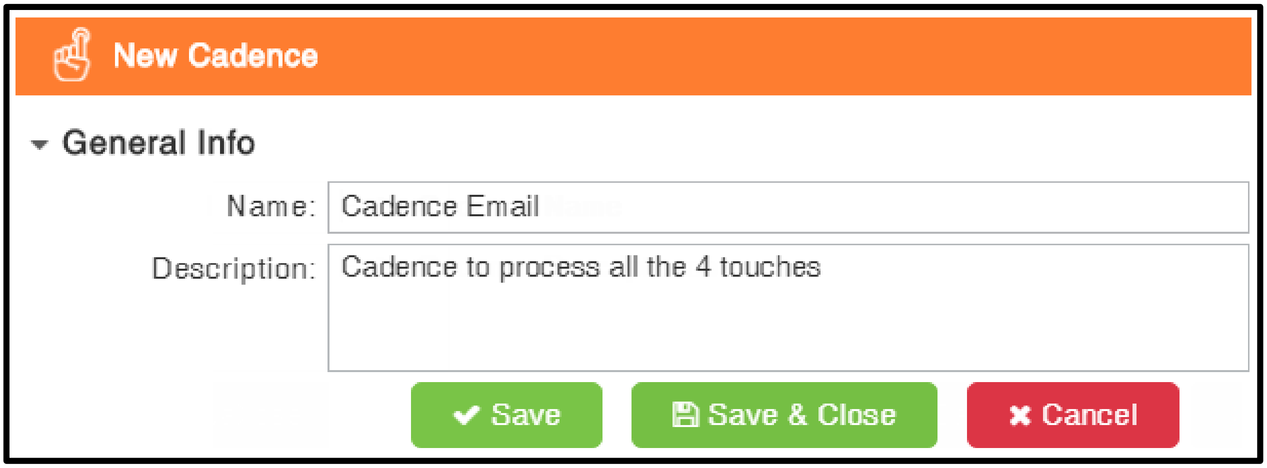
1. In the **Cadences** tab, click on the **New Cadence** button to create a new cadence.



2. The **New Cadence** popup window will be displayed.

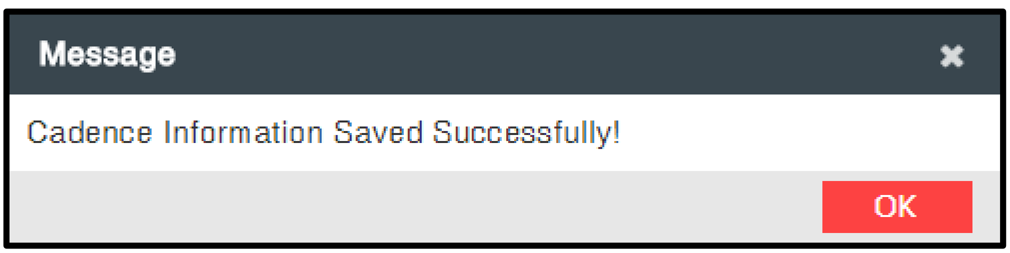


3. Enter the cadence **Name** and **Description** in the respective fields.

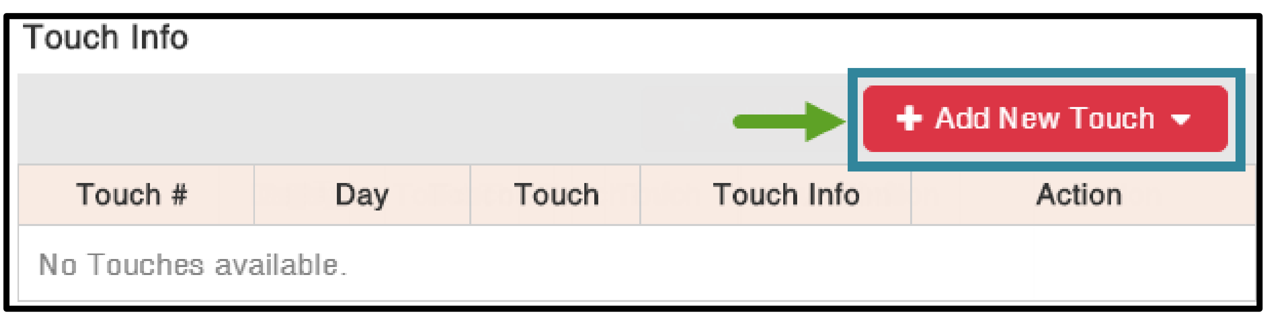


- Click **Save** to save the cadence and to proceed with **Touch** selection, or
- Click **Save and Close** to save the cadence and close the **New Cadence** window, or
- Click **Cancel** to cancel the process

4. The following message will be displayed, after the successful creation of a Cadence. Click **OK**.



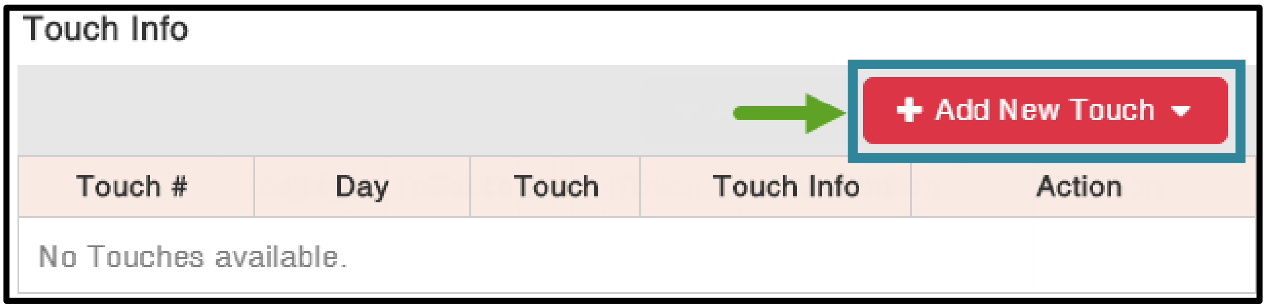
The **Add New Touch** button under the **Touch Info** section will be enabled to add the touches to the cadence.



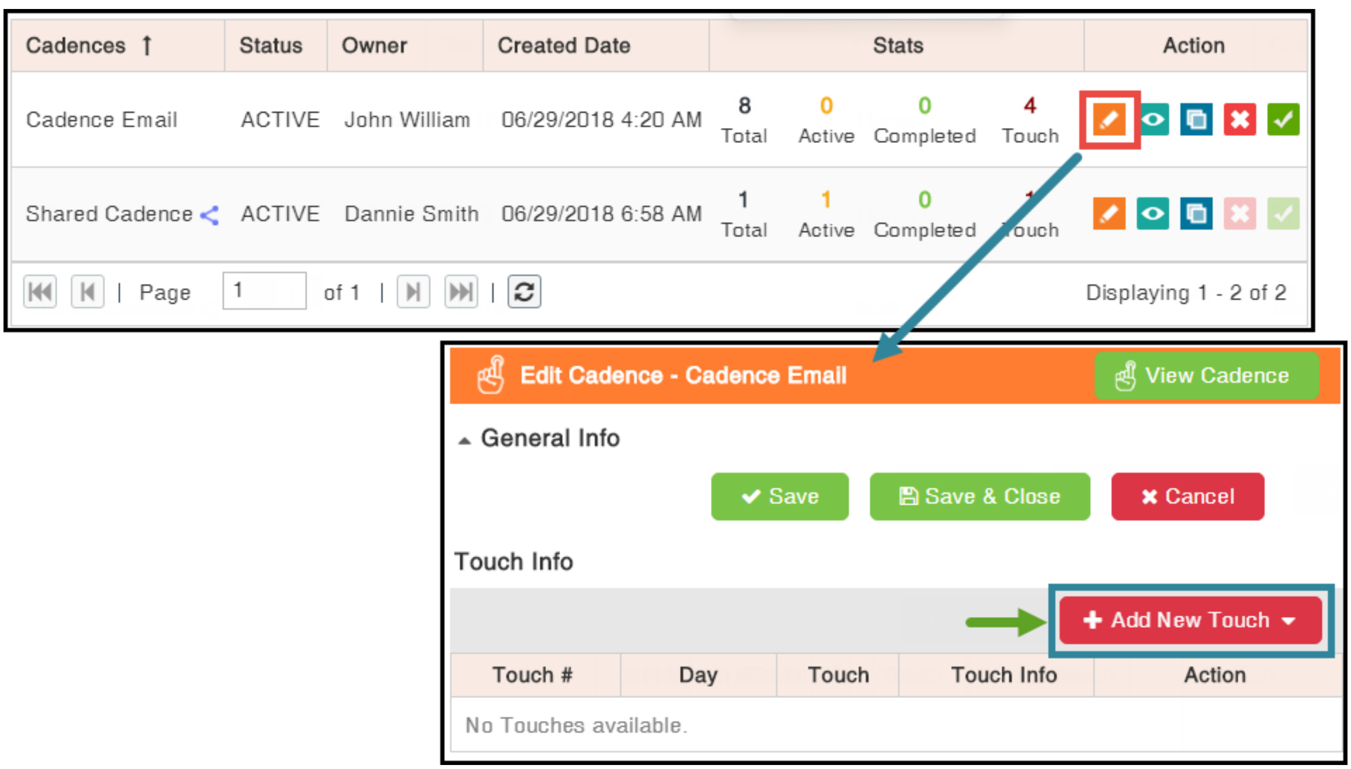
4.2 Add new Touches

Find the steps below to add a touch to the cadence:

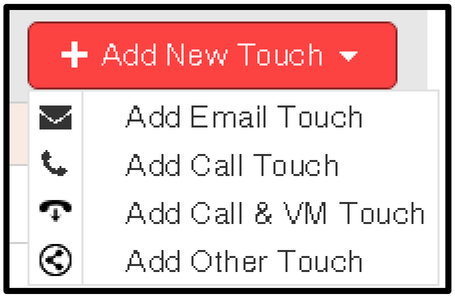
1. New Cadence – After saving the cadence, click on the **Add New Touch** dropdown from the **Touch Info** section and select the required Touch.



Existing Cadence – To add touches to an existing cadence, click on the **Edit** icon to the right of the cadence you wish to edit. In the **Edit Cadence** window, click on the **Add New Touch** dropdown from the **Touch Info** section and select the required Touch.



2. The following touches are available to select from the dropdown:

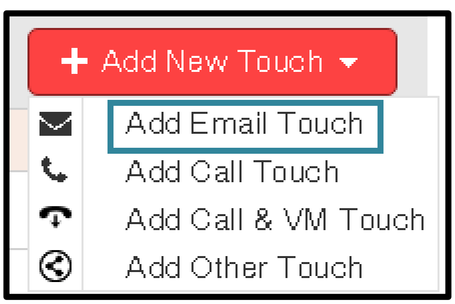


- Email Touch
- Call Touch
- Call & VM Touch
- Other Touch

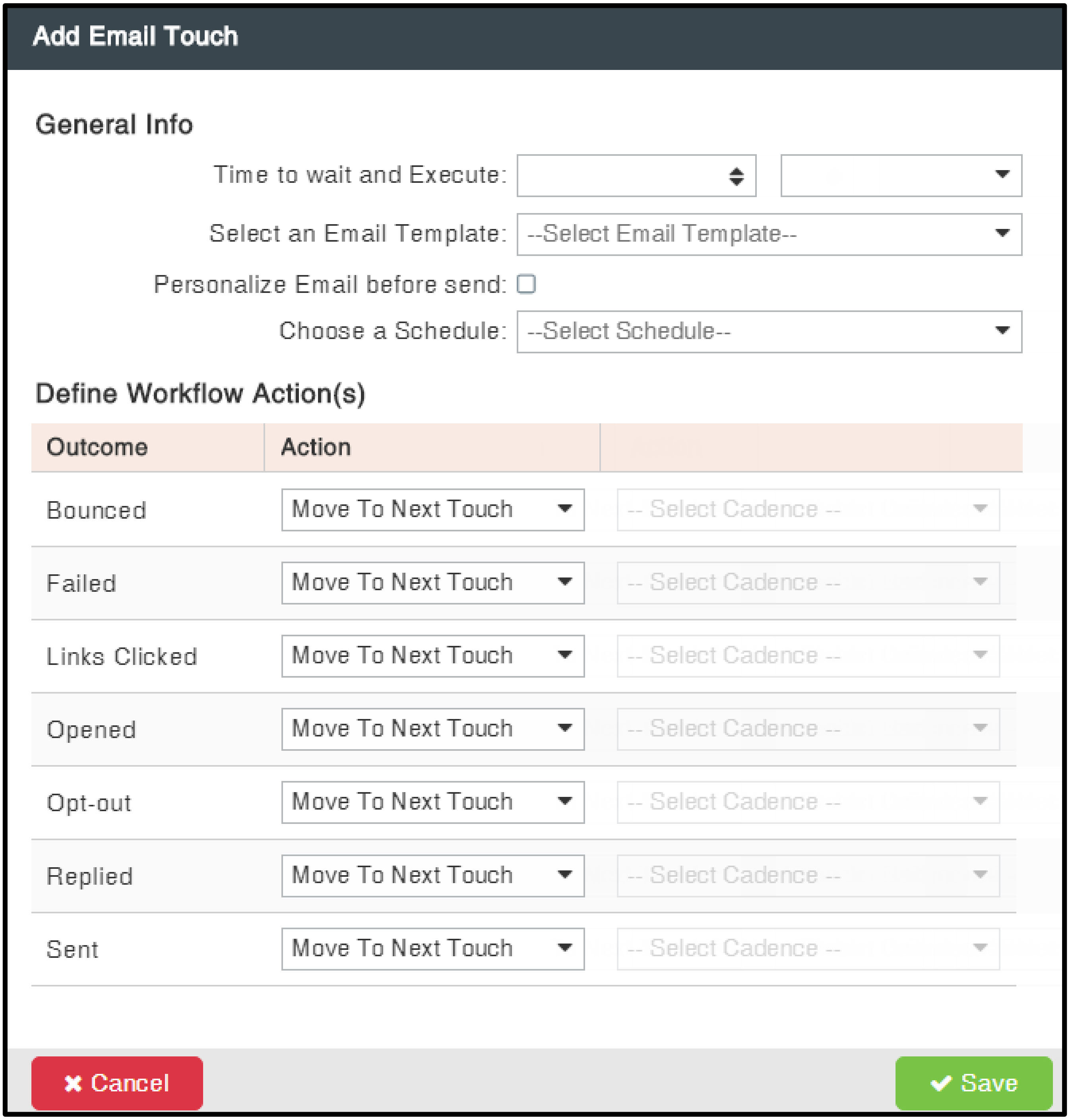
3. Enter the required details in the respective windows and click **Save** to save the touches or click **Cancel** to cancel the process.

4.2.1 Email Touch

1. In the **New/Edit Cadence** window, select the option **Add Email Touch** from the **Add New Touch** dropdown.

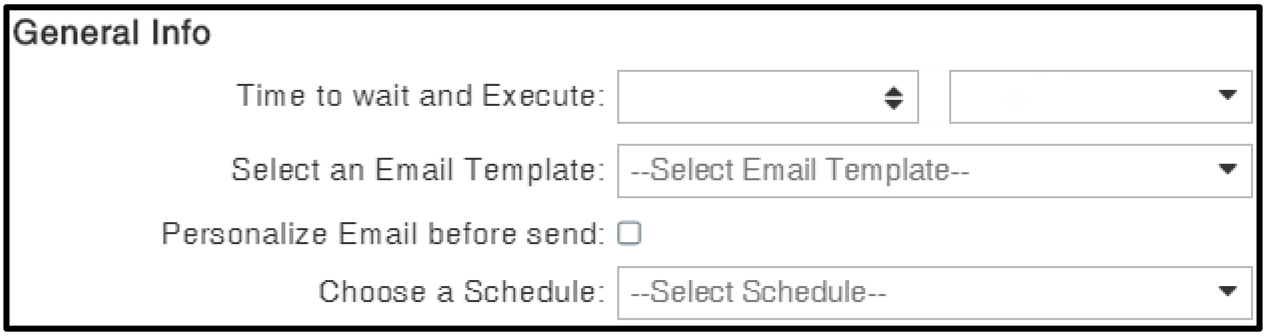


2. The **Add Email Touch** window will be displayed.


Add Email Touch
General Info
Time to wait and Execute:
Select an Email Template:
--Select Email Template--
Personalize Email before send:
Choose a Schedule:
--Select Schedule--
Define Workflow Action(s)
Outcome
Action
Bounced
Move To Next Touch
-- Select Cadence --
Failed
Move To Next Touch
-- Select Cadence --
Links Clicked
Move To Next Touch
-- Select Cadence --
Opened
Move To Next Touch
-- Select Cadence --
Opt-out
Move To Next Touch
-- Select Cadence --
Replied
Move To Next Touch
-- Select Cadence --
Sent
Move To Next Touch
-- Select Cadence --
Cancel
Save

3. Provide the **General Info** details and define the **Work Flow Action(s)**.

<u>General Info</u>



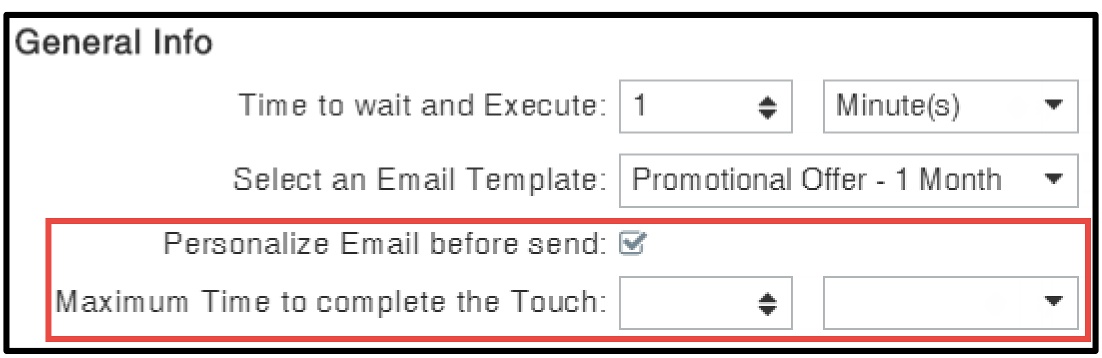
NOTE: All the fields below are mandatory.

- **Time to wait and Execute –** Select the delay time in minutes/hours/days to execute the email touch. The emails will be sent to the prospects ('unless personalize email before send' is selected), after the specified wait time

- **Select an Email Template –** Select a pre-defined email template from the dropdown that was created in the **Email Templates** tab. Refer to the **[Email Templates](#)** section for template creation

- **Personalize Email before send –** Select this option, if you wish to preview the email content/make changes to the existing email content before sending it to prospects. When this is selected, the emails will be placed in the **To-Do** tab, where you need to send emails manually, after previewing them.

  On selecting this option, the **Maximum Time to complete the Touch** option will be enabled. Select the maximum time you wish for the emails to be in the **To-Do** tab (in minutes/hours/days) for preview. If the email is not sent before that time is up, the email will expire & be removed from the **To-Do** tab and will fall under the outcome - '**Fall Through**'.

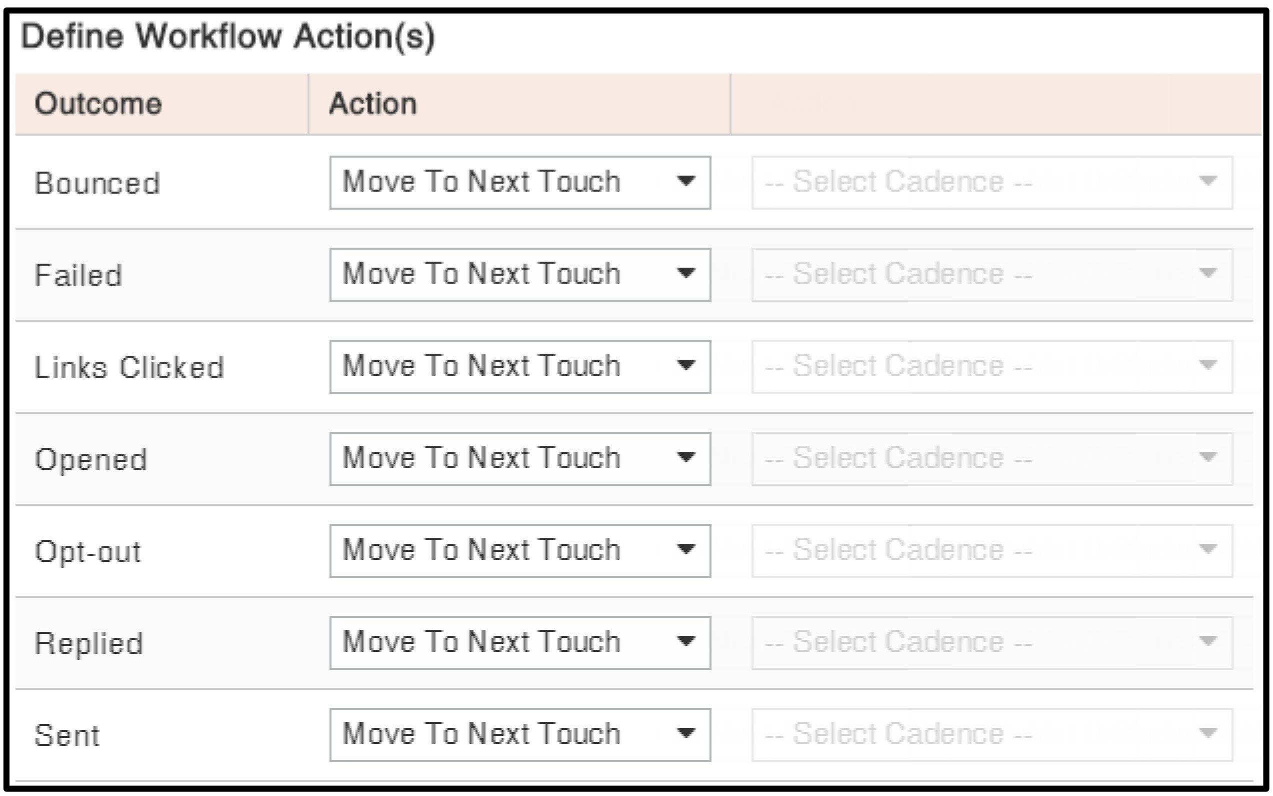


NOTE: When selecting the **Personalize Email before send** option, the below **Choose a Schedule** dropdown will be replaced with **Maximum Time to complete the Touch** option.

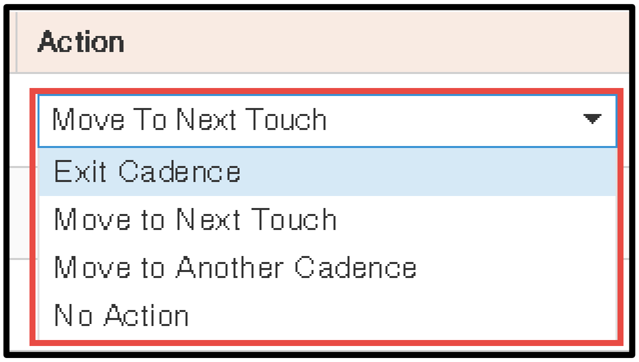
- **Choose a Schedule** – Select a pre-defined schedule from the dropdown that was created previously under the **Settings ► Email Execution Schedule** tab. Refer to the <u>Email Execution Schedule</u> section for schedule creation

<u>Define Workflow Action(s)</u>

In this section, you can assign the appropriate action that has to be performed for each email outcome.



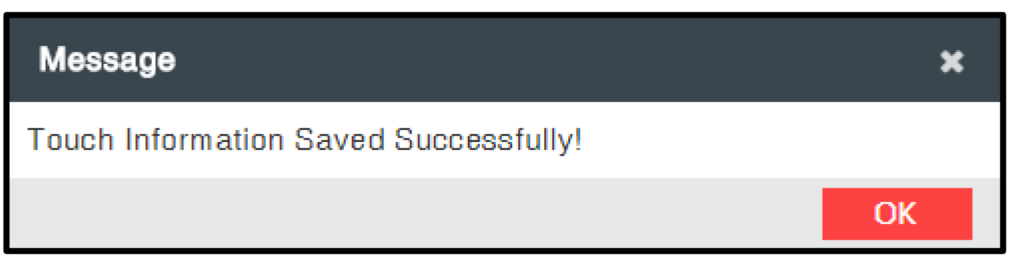
The following are the default actions available under the **Action** dropdown:



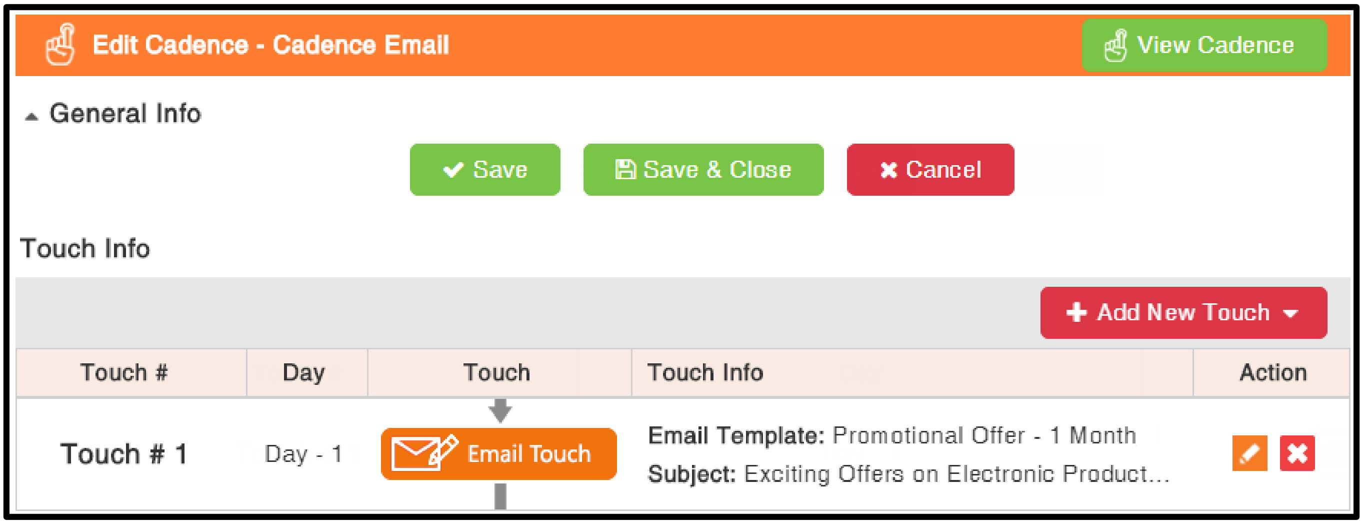
- **Exit Cadence –** Select, to exit the prospect(s) from the cadence
- **Move to Next Touch** – Select, to move the prospect(s) to the next touch that was defined in the respective cadence, e.g. Call Touch
- **Move to Another Cadence** – Select, to move the prospect(s) to another cadence. On selecting this option, a dropdown field will be enabled to select the appropriate cadence to which the prospect(s) has to be moved

- **No Action** – No action will be performed. The prospect with stay in this touch, until another action is chosen, or the maximum time to complete touch is reached

4. Click **Save** to save the Email touch. The following message will be displayed, after successful creation of an Email Touch. Click **OK**.



5. The Email Touch Info will be displayed as shown below:

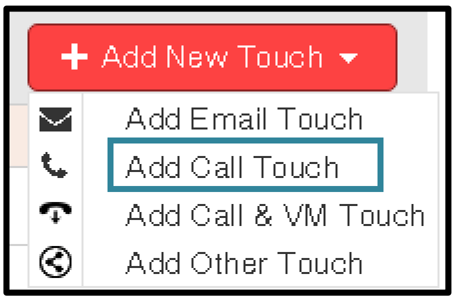

Edit Cadence - Cadence Email
View Cadence
General Info
Save
Save & Close
Cancel
Touch Info
Add New Touch
Touch #
Day
Touch
Touch Info
Action
Touch # 1
Day - 1
Email Touch
Email Template: Promotional Offer - 1 Month
Subject: Exciting Offers on Electronic Product...

4.2.2 Call Touch

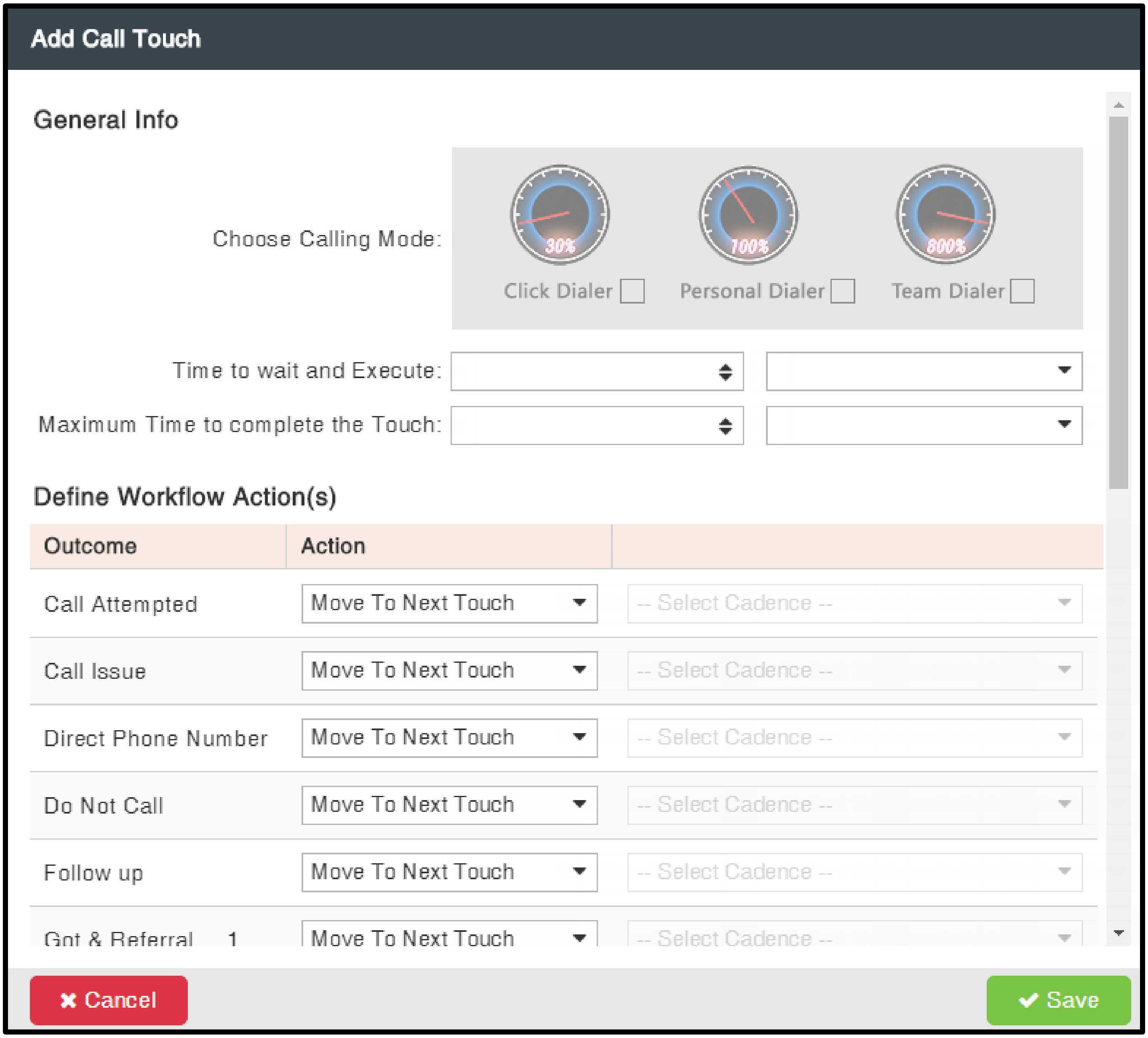
In the Call Touch, you can initiate the dialing session to connect with the prospects assigned. Once the prospects are assigned, all the prospects will be moved to the **Pending Calls** tab where you need to manually start the dialing session (via Team Dialer/Personal Dialer/Click Dialer).

Find the steps below to add a call touch:

1. In the **New/Edit Cadence** window, select the **Add Call Touch** option from the **Add New Touch** dropdown.

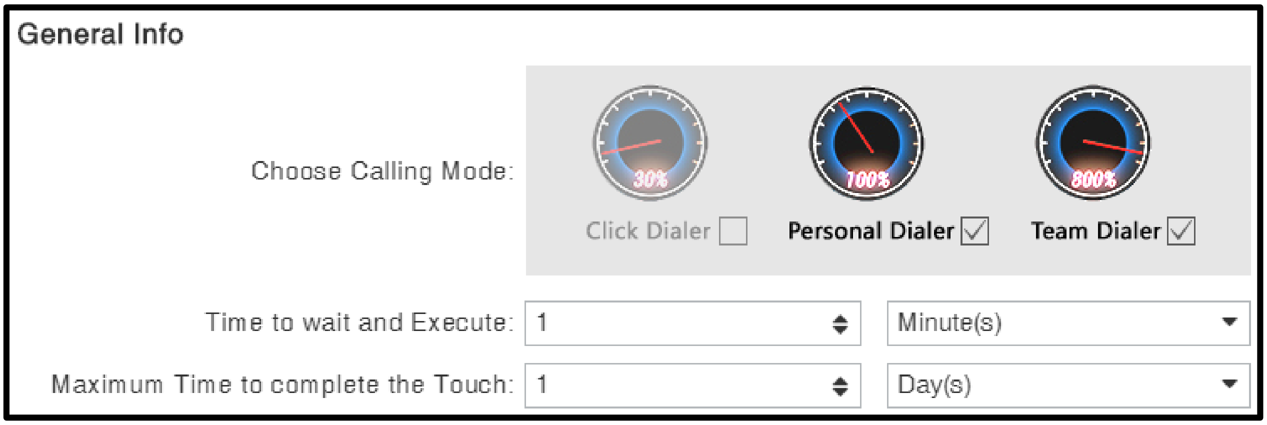


2. The **Add Call Touch** window will be displayed.


Add Call Touch
General Info
Choose Calling Mode:
30%
100%
800%
Click Dialer
Personal Dialer
Team Dialer
Time to wait and Execute:
Maximum Time to complete the Touch:
Define Workflow Action(s)
Outcome
Action
Call Attempted
Move To Next Touch
-- Select Cadence --
Call Issue
Move To Next Touch
-- Select Cadence --
Direct Phone Number
Move To Next Touch
-- Select Cadence --
Do Not Call
Move To Next Touch
-- Select Cadence --
Follow up
Move To Next Touch
-- Select Cadence --
Move To Next Touch
-- Select Cadence --
Cancel
Save

3. Provide the **General Info** details and define the **Work Flow Action(s)**.

<u>**General Info**</u>



NOTE: All the fields below are mandatory.

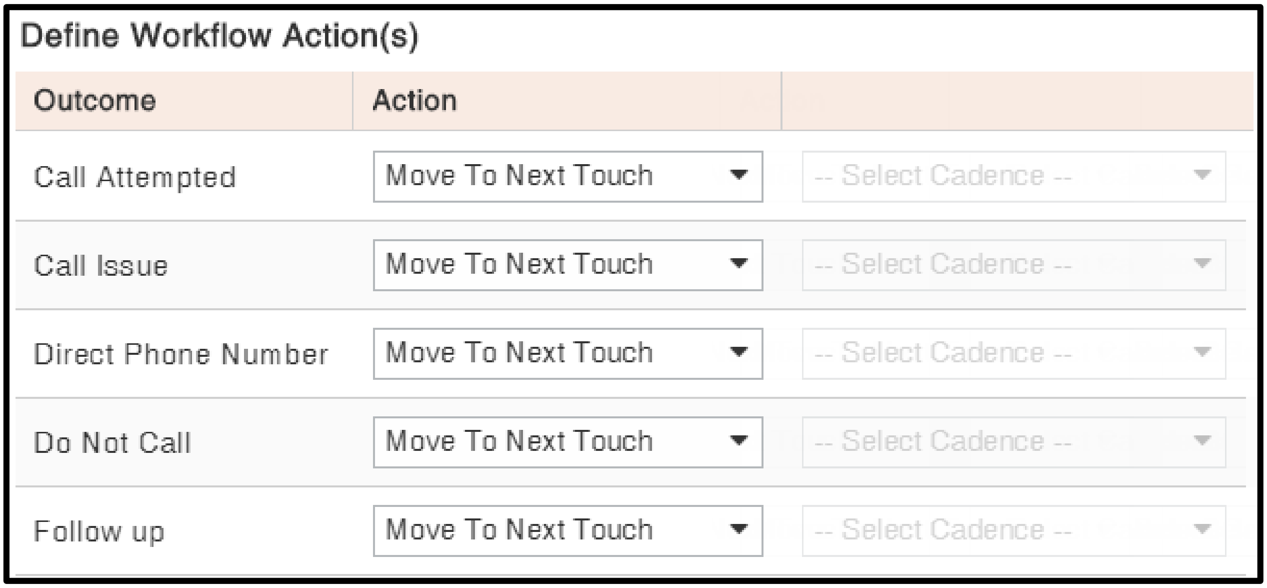
- **Choose Calling Mode –** Select the dialer(s) you wish to use to dial the prospects in this touch.

  NOTE: You can only use dialers in which you have a license for.

- **Time to wait and Execute** – Select the delay time in minutes/hours/days to execute the call touch. The prospects will be moved to the **Pending Calls** tab for dialing, after the specified wait time

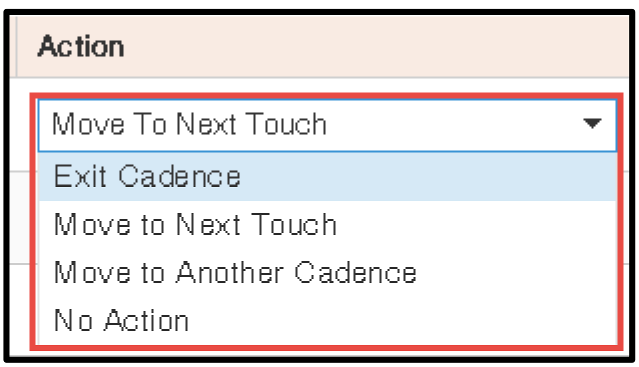
- **Maximum Time to complete the Touch** – Select the maximum time the prospects should be in the **Pending Calls** tab (in minutes/hours/days), after which the prospects will expire & be removed from the **Pending Calls** tab and will fall under the outcome - '**Fall Through**'. They will then be moved to the next touch.

Define Workflow Action(s)



In this section, you can assign the appropriate action that has to be performed for each call outcome.

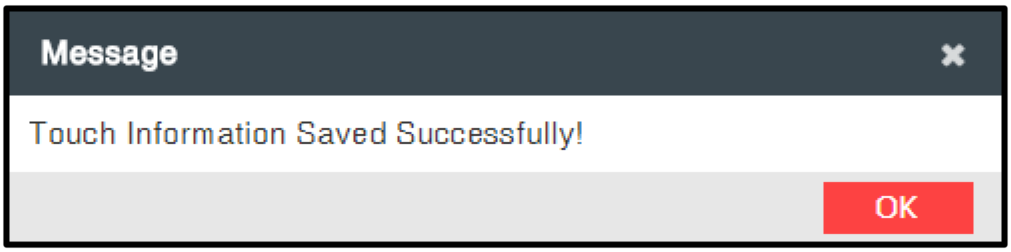
The following are the default actions available under **Action** dropdown:



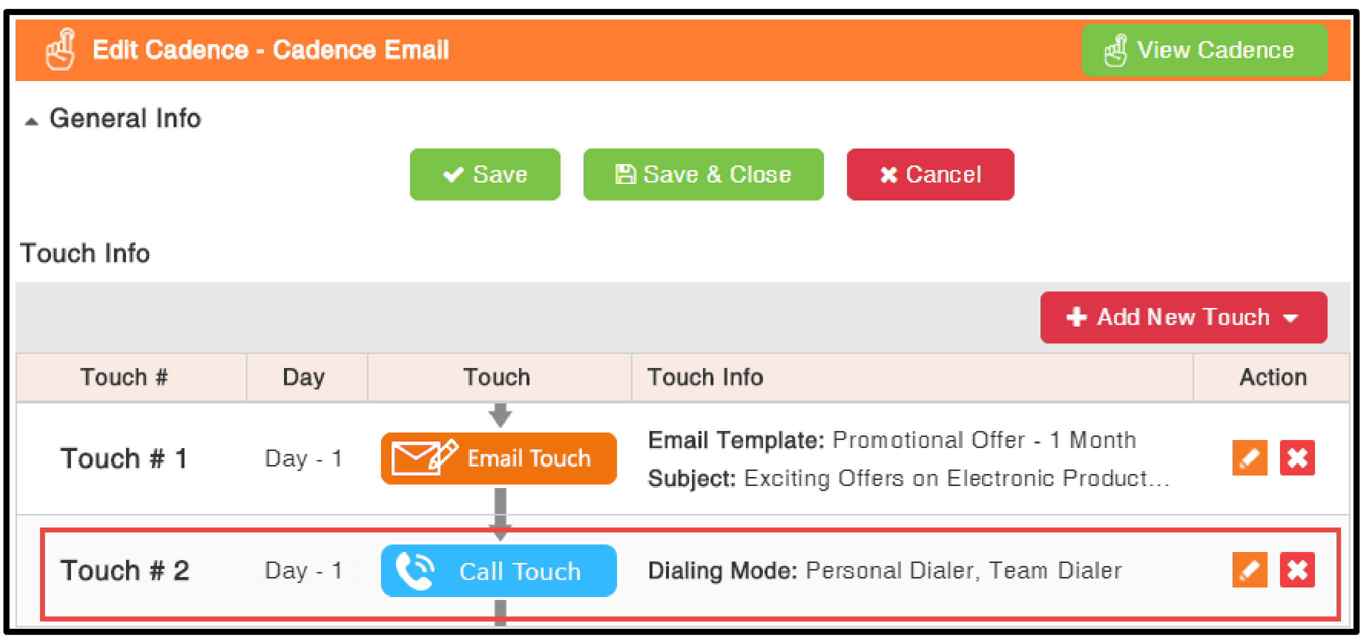
- **Exit Cadence** – Select to exit the prospect(s) from the cadence
- **Move to Next Touch** – Select to move the prospect(s) to the next touch that was defined in the respective cadence, e.g. VM & Call Touch
- **Move to Another Cadence** – Select to move the prospect(s) to another cadence. On selecting this option, a dropdown field will be enabled to select the appropriate cadence to which the prospect has to be moved

- **No Action –** No action will be performed. The prospect with stay in this touch, until another action is chosen, or the maximum time to complete touch is reached

4. Click **Save** to save the Call touch. The following message will be displayed, after successful creation of the Call Touch. Click **OK**.



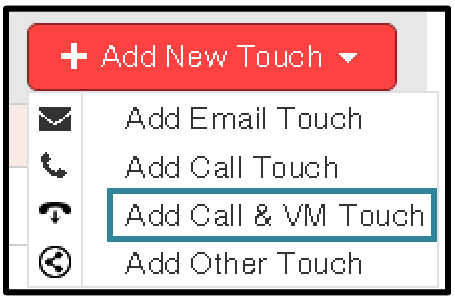
5. The Call Touch Info will be displayed as shown below:



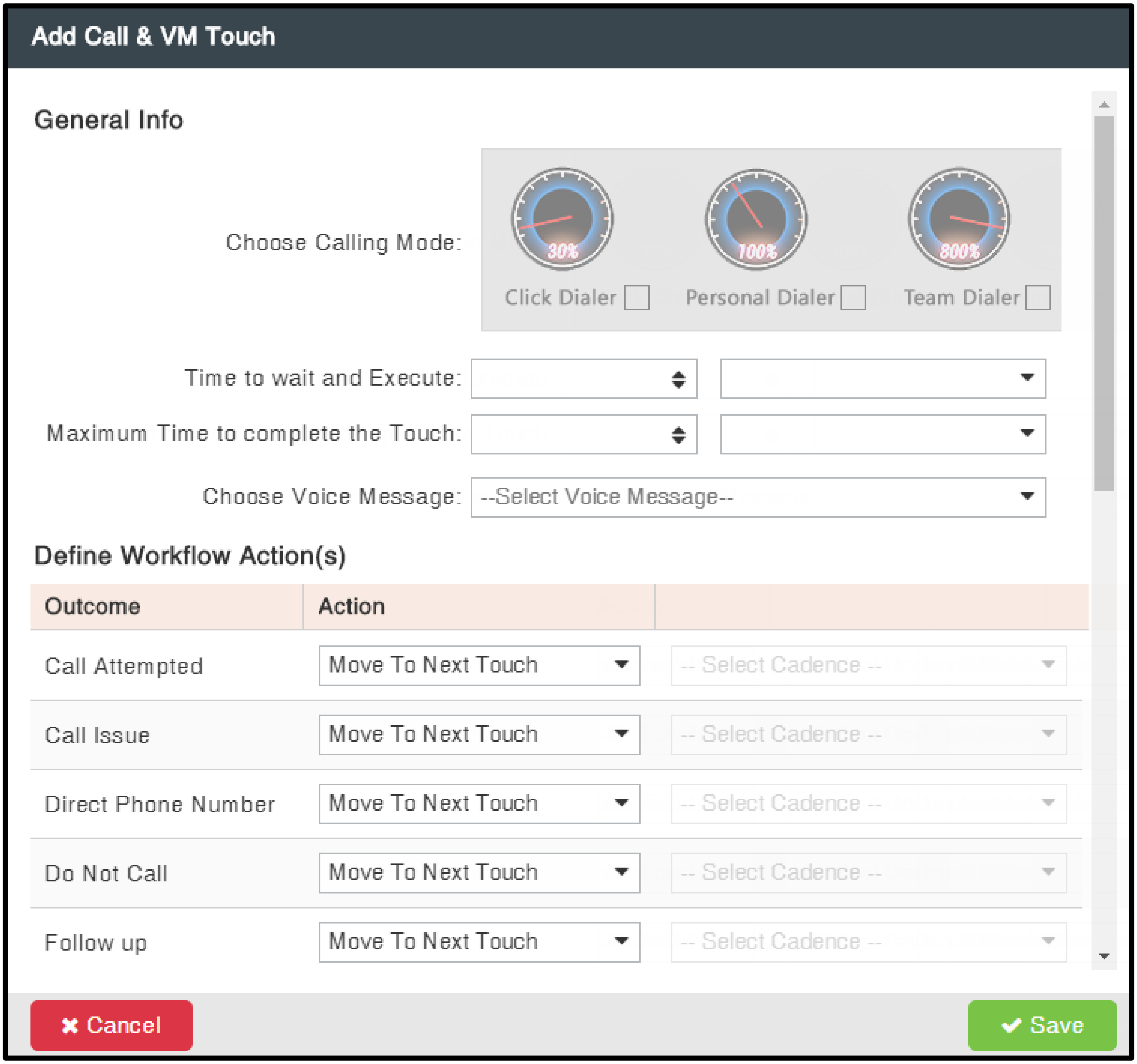
4.2.3 Call & VM Touch

In the Call & VM Touch, you can initiate the dialing session and if the prospect does not connect, you can leave a pre-recorded voicemail.

1. In the **New/Edit Cadence** window, select the **Add Call & VM Touch** option from the **Add New Touch** dropdown.

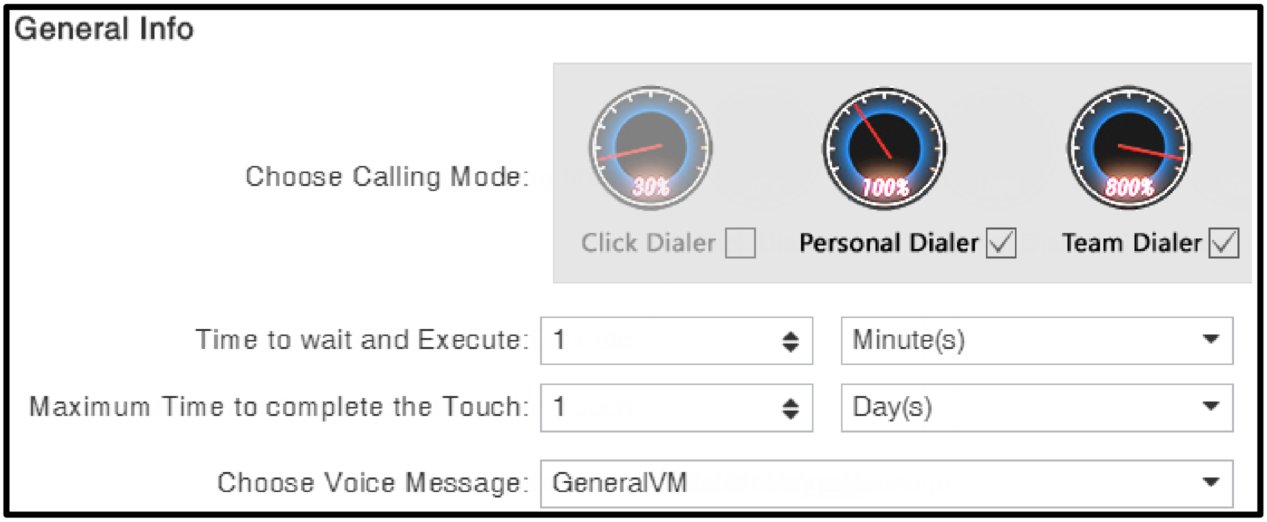


2. The **Add Call & VM Touch** window will be displayed.


Add Call & VM Touch
General Info
Choose Calling Mode:
30%
100%
800%
Click Dialer
Personal Dialer
Team Dialer
Time to wait and Execute:
Maximum Time to complete the Touch:
Choose Voice Message:
--Select Voice Message--
Define Workflow Action(s)
Outcome
Action
Call Attempted
Move To Next Touch
-- Select Cadence --
Call Issue
Move To Next Touch
-- Select Cadence --
Direct Phone Number
Move To Next Touch
-- Select Cadence --
Do Not Call
Move To Next Touch
-- Select Cadence --
Follow up
Move To Next Touch
-- Select Cadence --
Cancel
Save

3. Provide the **General Info** details and define the **Work Flow Action(s)**.

General Info



NOTE: All the fields below are mandatory.

- **Choose Calling Mode –** Select the dialer(s) you wish to use to dial the prospects in this touch.

  NOTE: You can only use dialers in which you have a license for.

- **Time to wait and Execute** – Select the delay time in minutes/hours/days to execute the call touch. The prospects will be moved to the **Pending Calls** tab for dialing, after the specified wait time

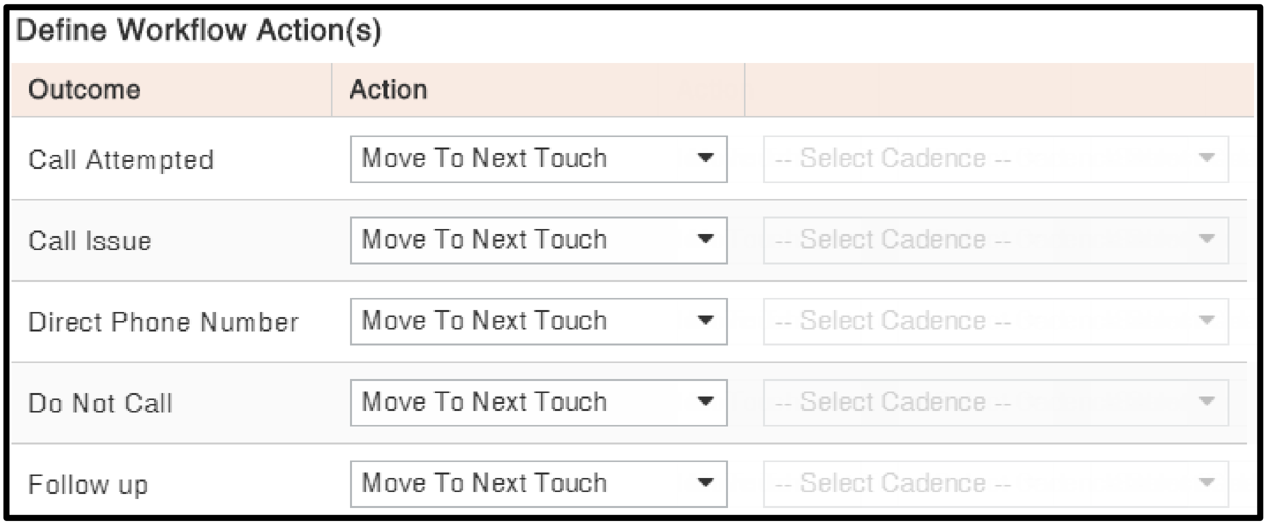
- **Maximum Time to complete the Touch** – Select the maximum time the prospects should be in the **Pending Calls** tab (in minutes/hours/days), after which the prospects will expire & be removed from the **Pending Calls** tab and will fall under the outcome - '**Fall Through**'. They will then be moved to the next touch.

- **Choose Voice Message** – Select a pre-recorded voice message from the dropdown. (This can be changed before starting a dialing session)

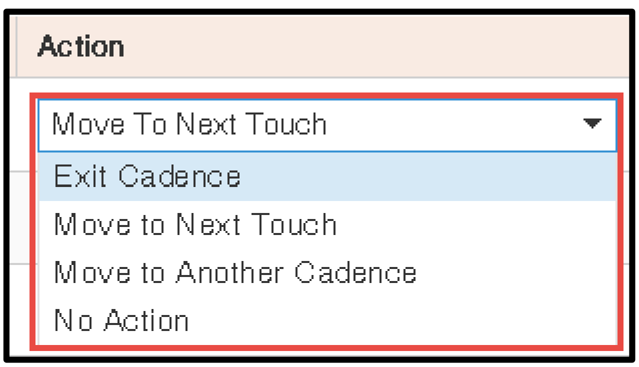
  NOTE: Voice message(s) that were recorded by the logged-in user in the dialers (Personal Dialer/Team Dialer/Click Dialer) will be listed here.

Define Workflow Action(s)

In this section, you can assign the appropriate action that has to be performed for each call outcome.



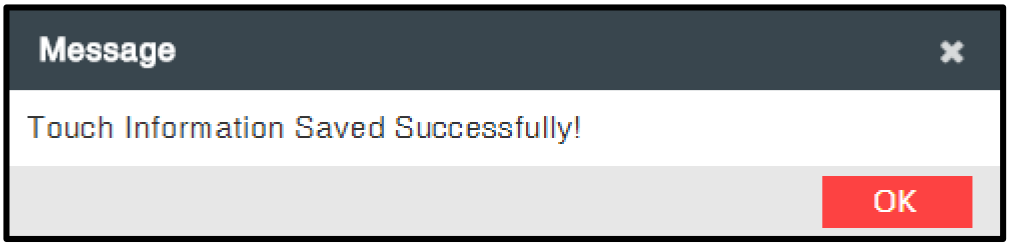
The following are the default actions available under **Action** dropdown:



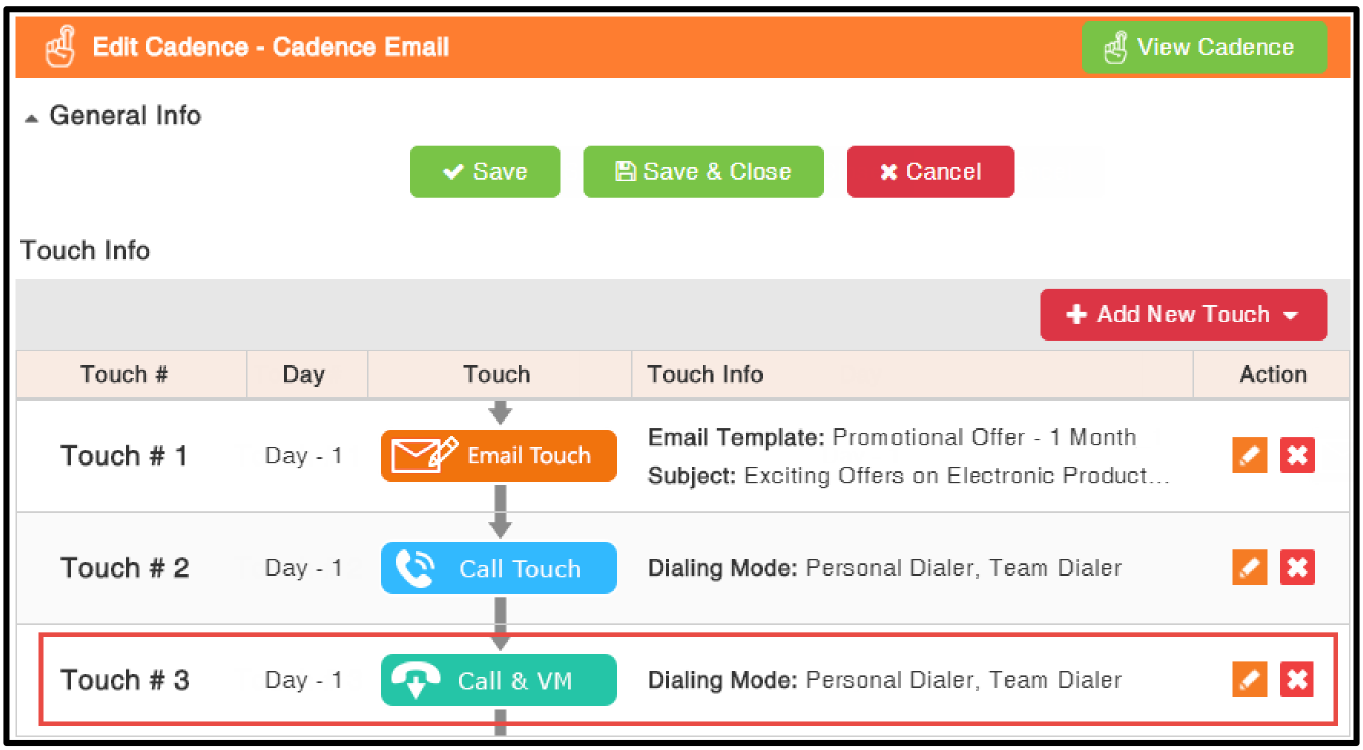
- **Exit Cadence** – Select to exit the prospect(s) from the cadence
- **Move to Next Touch** – Select to move the prospect(s) to the next touch that was defined in the respective cadence, e.g. Other Touch
- **Move to Another Cadence** – Select to move the prospect(s) to another cadence. On selecting this option, a dropdown field will be enabled to select the appropriate cadence the prospect has to be moved to

- **No Action –** No action will be performed. The prospect with stay in this touch, until another action is chosen, or the maximum time to complete touch is reached

4. Click **Save** to save the Call & VM touch. The following message will be displayed, after successful creation of the Call Touch. Click **OK**.



5. The Call & VM Touch Info will be displayed, as shown below:

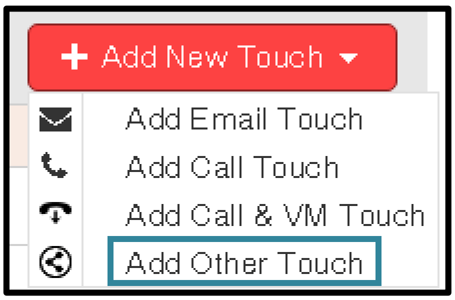


4.2.4 Other Touch

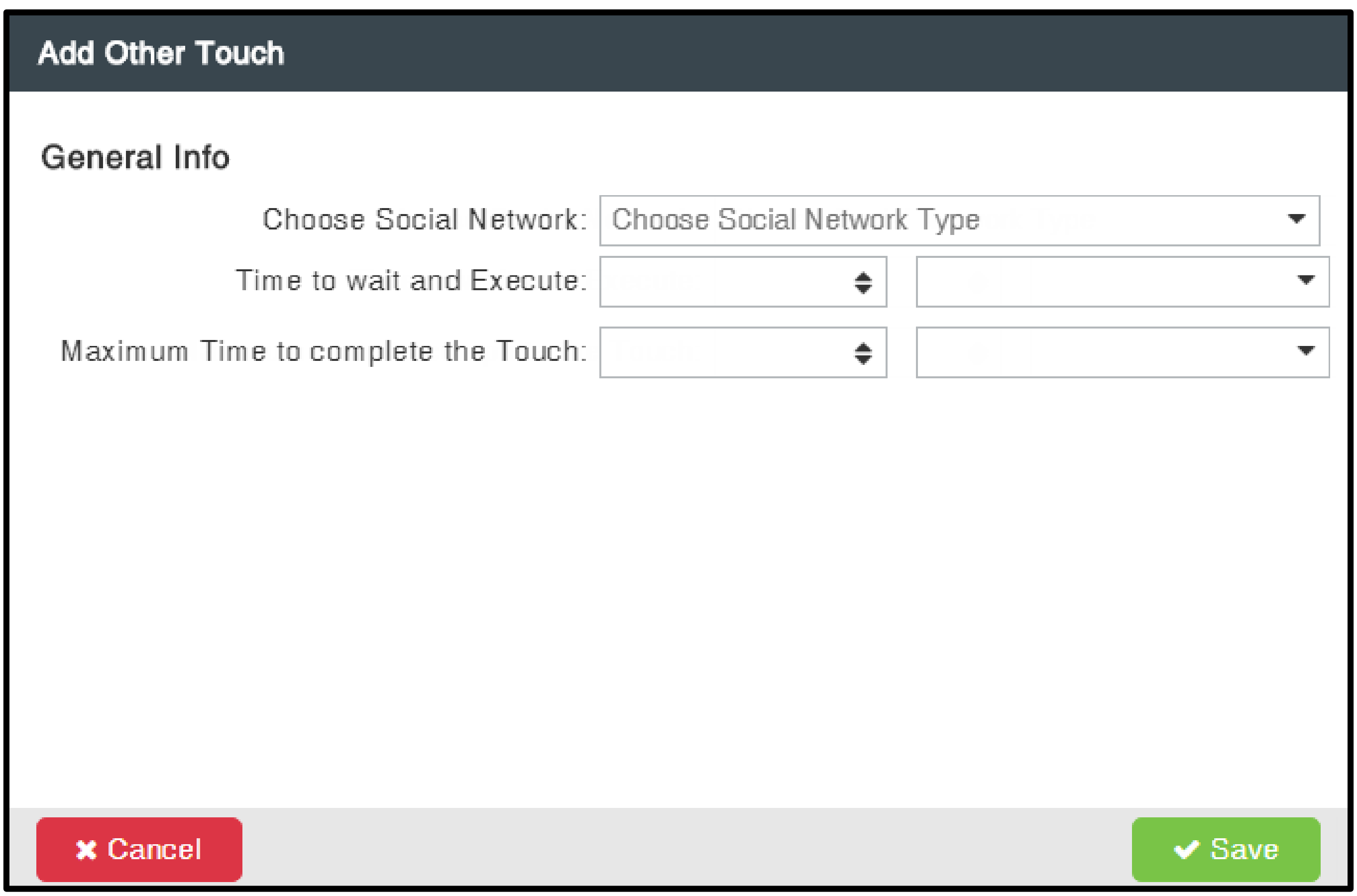
The **Other Touch** also called **Social Touch**, is used to expand your sales boundary through Social Media like LinkedIn, Facebook, Twitter and Instagram.

Find the steps below to add Other Touch:

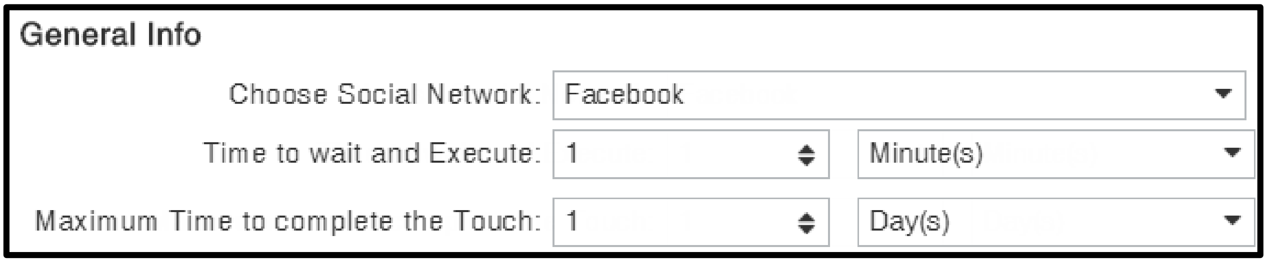
1. In the **New/Edit Cadence** window, select the **Add Other Touch** option from the **Add New Touch** dropdown.



2. The **Add Other Touch** window will be displayed.



3. Provide the **General Info** details



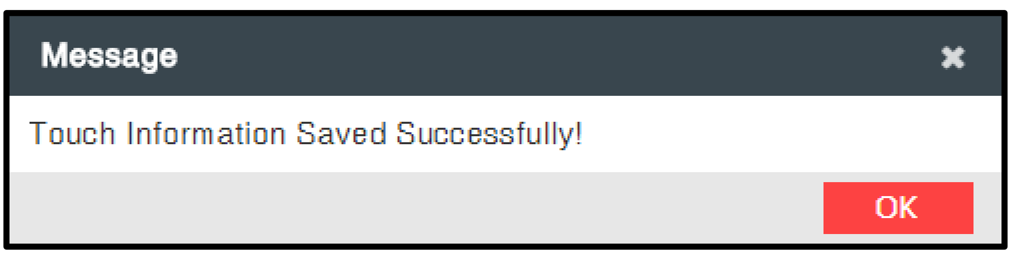
NOTE: All the fields below are mandatory.

- **Choose Social Network** – Select the appropriate social network from the **Choose Social Network** dropdown through which you would like to reach out, e.g. Google, LinkedIn, Facebook, Twitter, Tumblr or Instagram

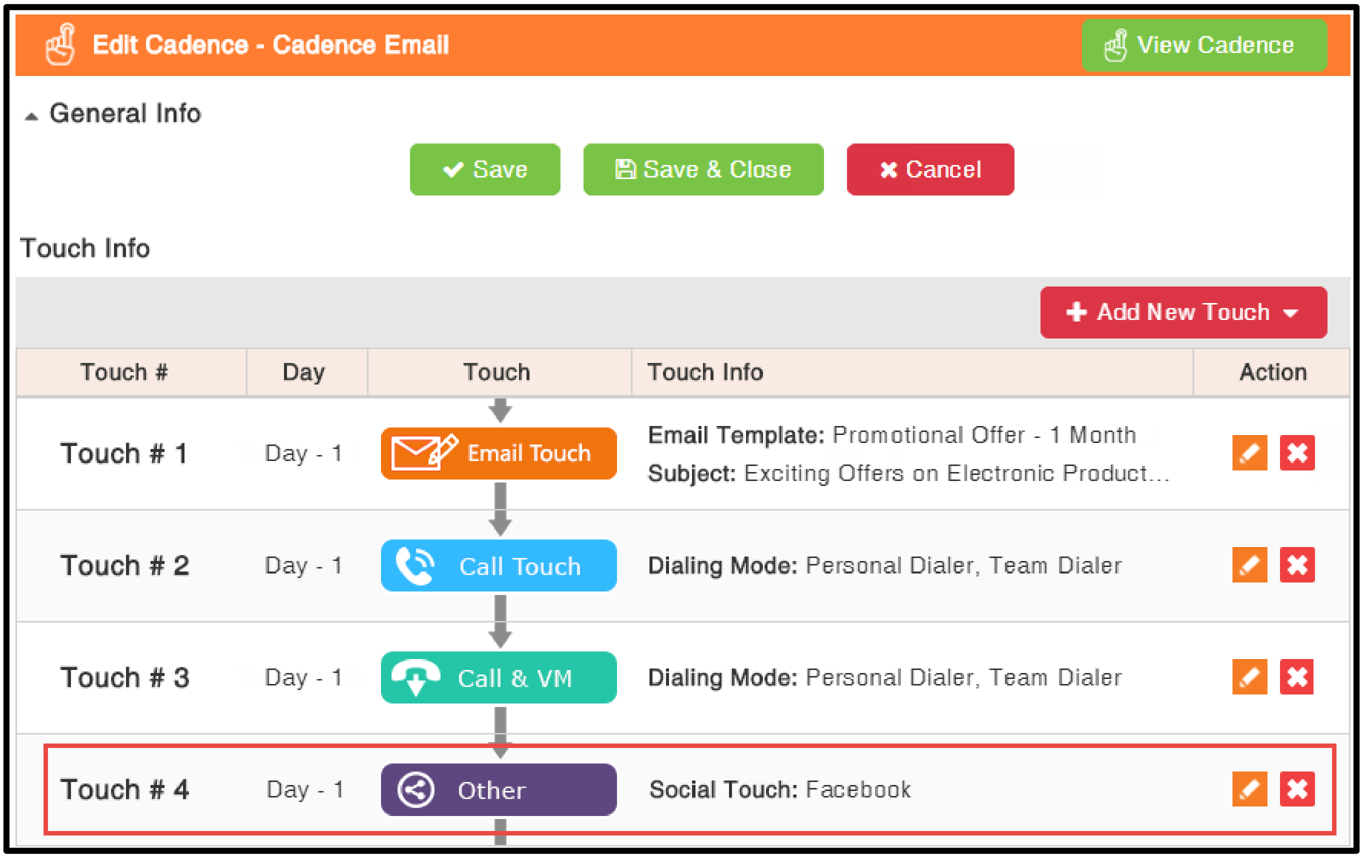
- **Time to wait and Execute** – Select the delay time in minutes/hours/days to execute the Other touch. The prospects under the selected Cadence will be moved automatically to the **To-Do** tab for execution, after the specified wait time

- **Maximum Time to complete the Touch** – Select the maximum time the prospects should be (assigned with Other Touch) in the **To-Do** tab (in minutes/hours/days), after which the prospects will expire & be removed from the **To-Do** tab and will fall under the outcome - '**Fall Through**'. The prospect will then move to the next touch.

4. Click **Save** to save the **Other touch**. The following message will be displayed, after successful creation of an Other Touch. Click **OK**.



5. The Other Touch Info will be displayed as shown below:



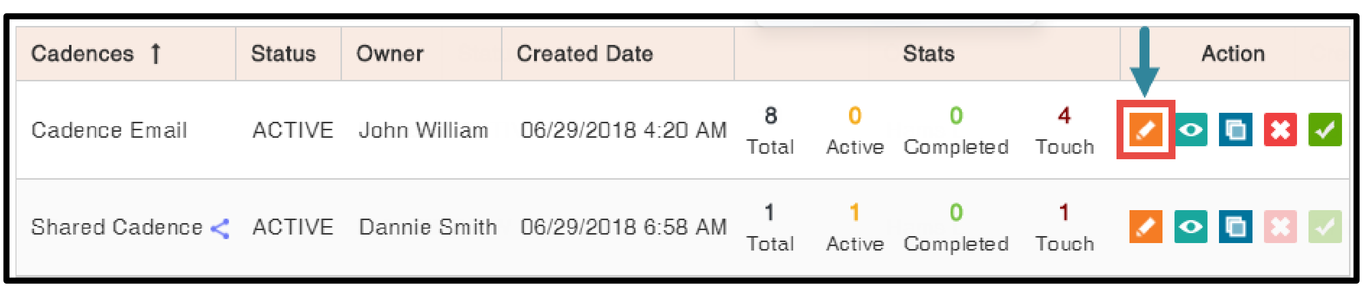
After successfully creating other touch, the prospects assigned under other touch will be moved to the **To-Do** tab.

Refer to [Chapter 7 – To-Do Tab] for further information on the execution of Other Touch.

4.3 Edit a Touch

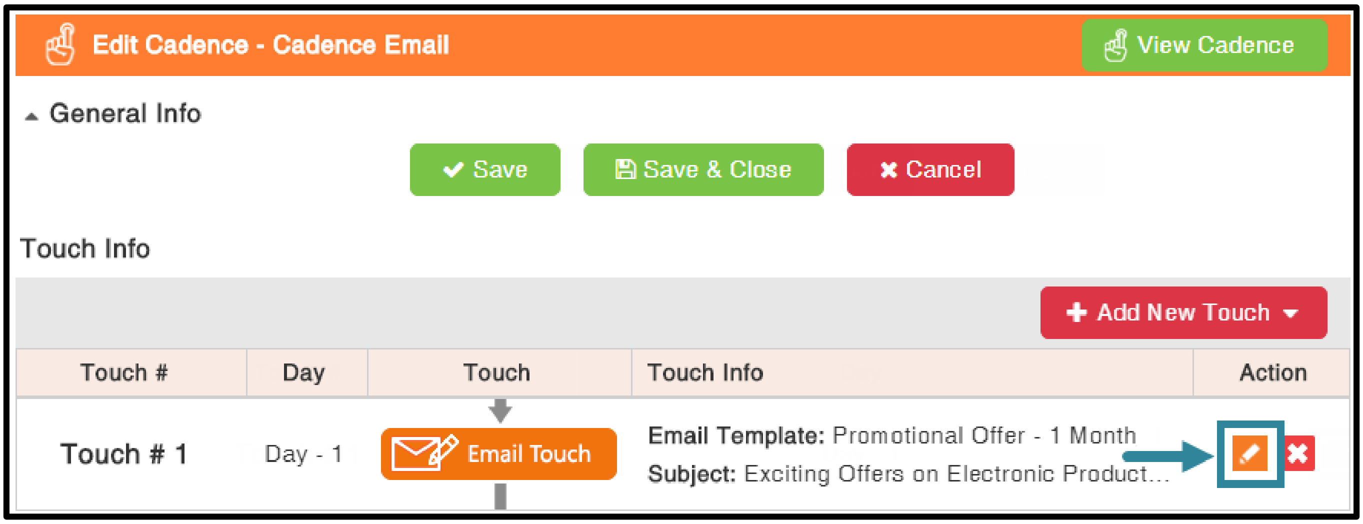
Find the steps below to edit a Touch in a Cadence:

1. In the **Cadences** tab, click on the **Edit** icon to the right of the cadence in which the touch details need to be modified.

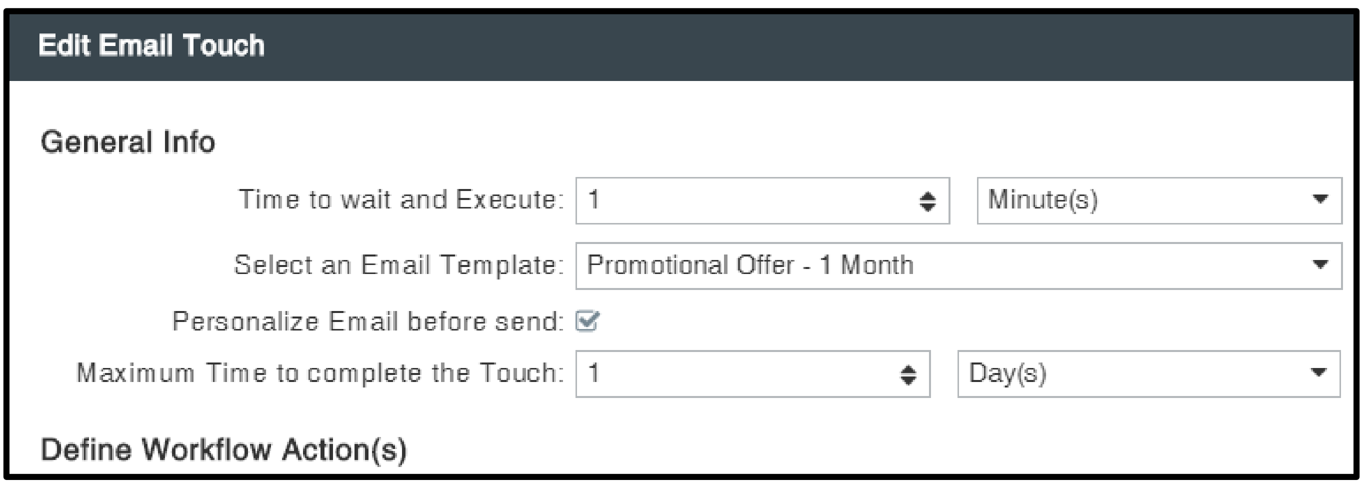


2. The **Edit Cadence** window will be displayed.

3. Click on the **Edit** icon to the right of the respective touch.



4. The edit window of the respective touch will be displayed. Modify the touch details as needed.

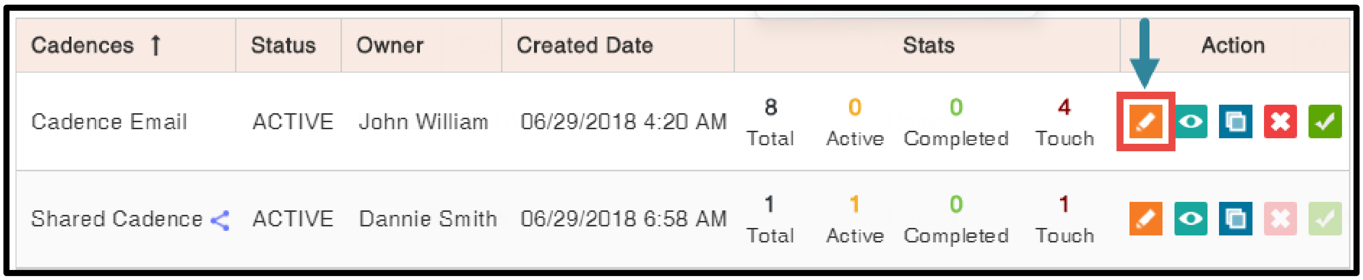


5. Click **Save** to save the changes or click **Cancel** to cancel the changes.

4.4 Delete a Touch

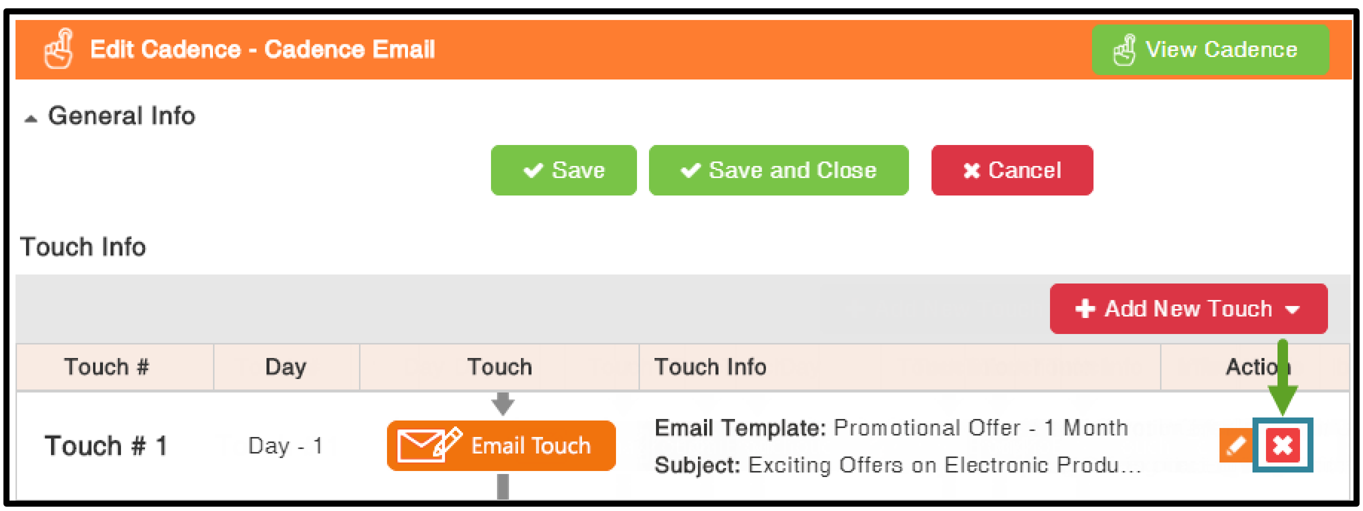
Find the steps below to delete a Touch in a Cadence:

1. In the **Cadences** tab, click on the **Edit** icon to the right of the cadence in which the touch details need to be deleted.

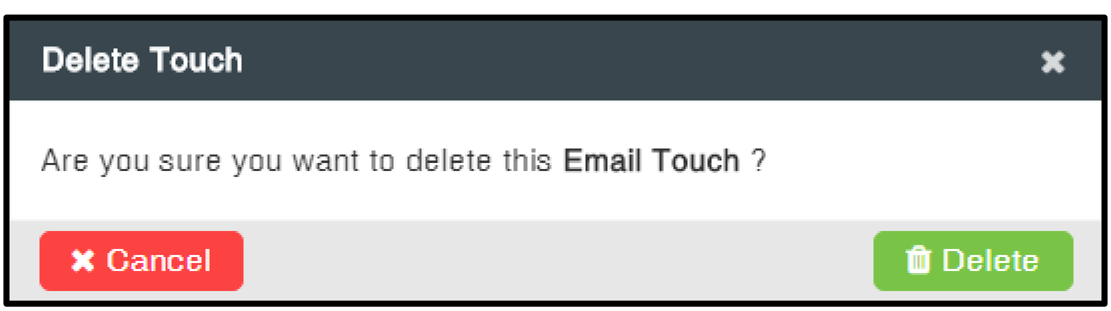


2. The **Edit Cadence** window will be displayed.

3. Click on the **Delete** icon to the right of the respective touch.

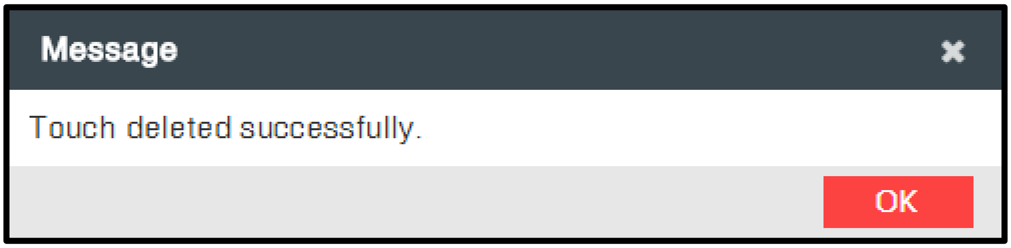


4. A confirmation message will be displayed, as shown below:



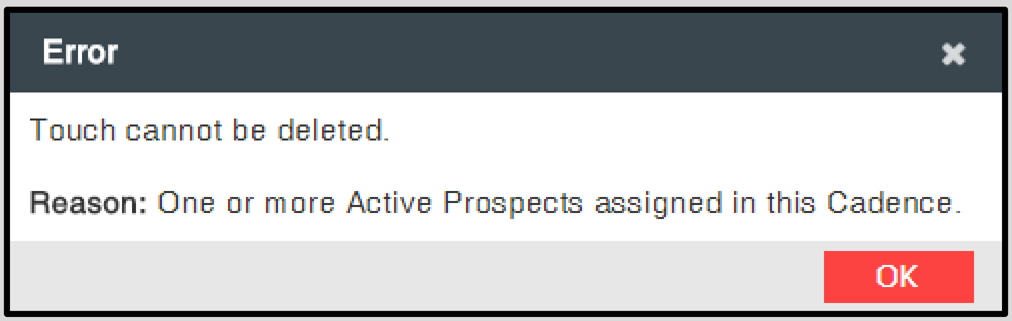
5. Click **Delete** to delete the touch or click **Cancel** to cancel the process.

6. The following message will be displayed after successful deletion. Click **OK**.



<u>IMPORTANT NOTE</u>

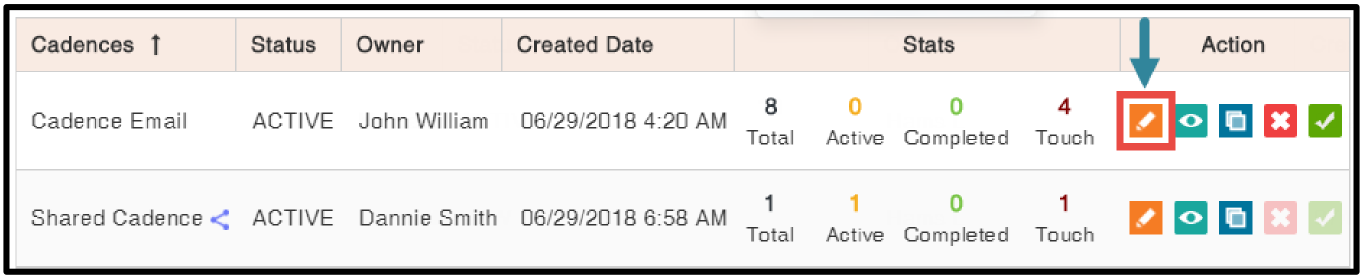
If one or more active prospects are assigned in the selected Cadence, then the following error message will be displayed.



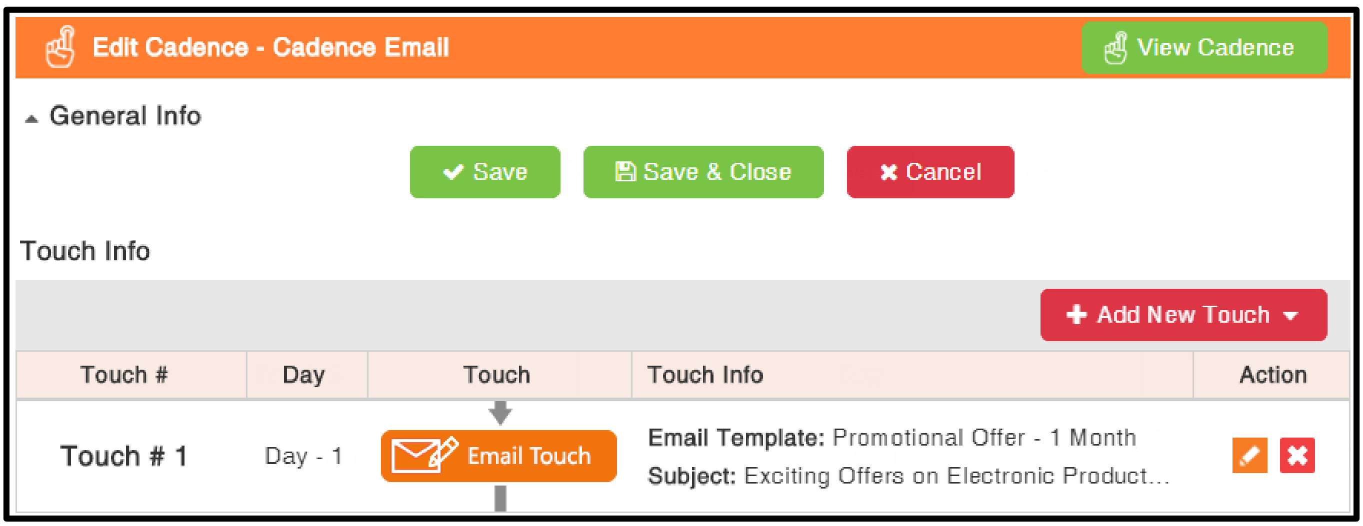
4.5 Edit a Cadence

Find the steps below to edit a Cadence:

1. In the **Cadences** tab, click on the **Edit** icon to the right of the Cadence which needs to be edited.



2. The **Edit Cadence** window will be displayed. Modify the details as needed, including touch details.



3. Click **Save** to save the changes or click **Cancel** to cancel the process.

4.6 View Cadence

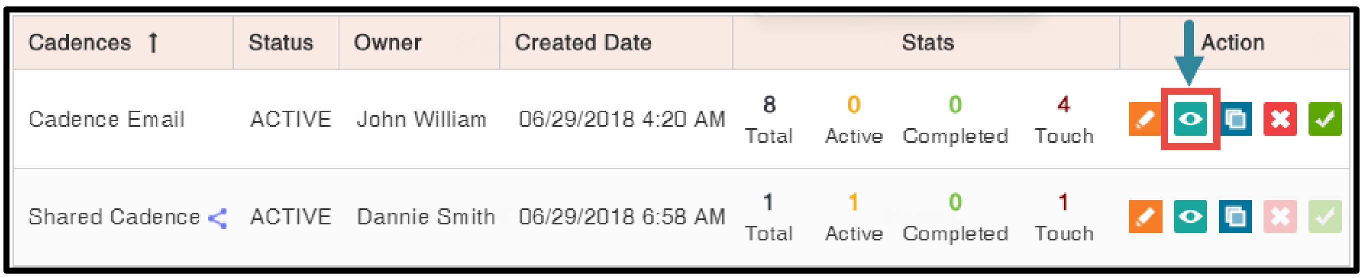
In TruCadence, you can track the metrics of the cadences. The cadence metrics can be viewed/tracked from the **View Cadence** window of the respective cadence.

Find the steps below to view the activity on a Cadence:

1. The **View Cadence** window can be opened by either one of the following methods:

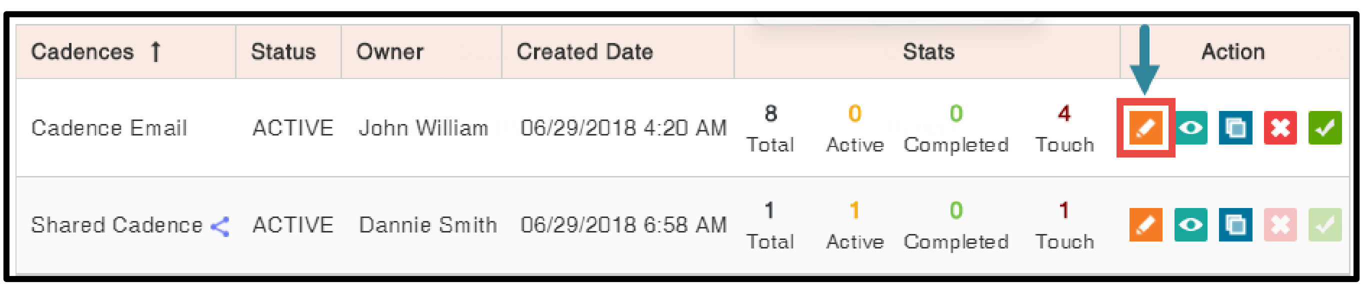
   Method - 1

   a. In the **Cadences** tab, click on the **View** icon to the right of the Cadence you wish to view.



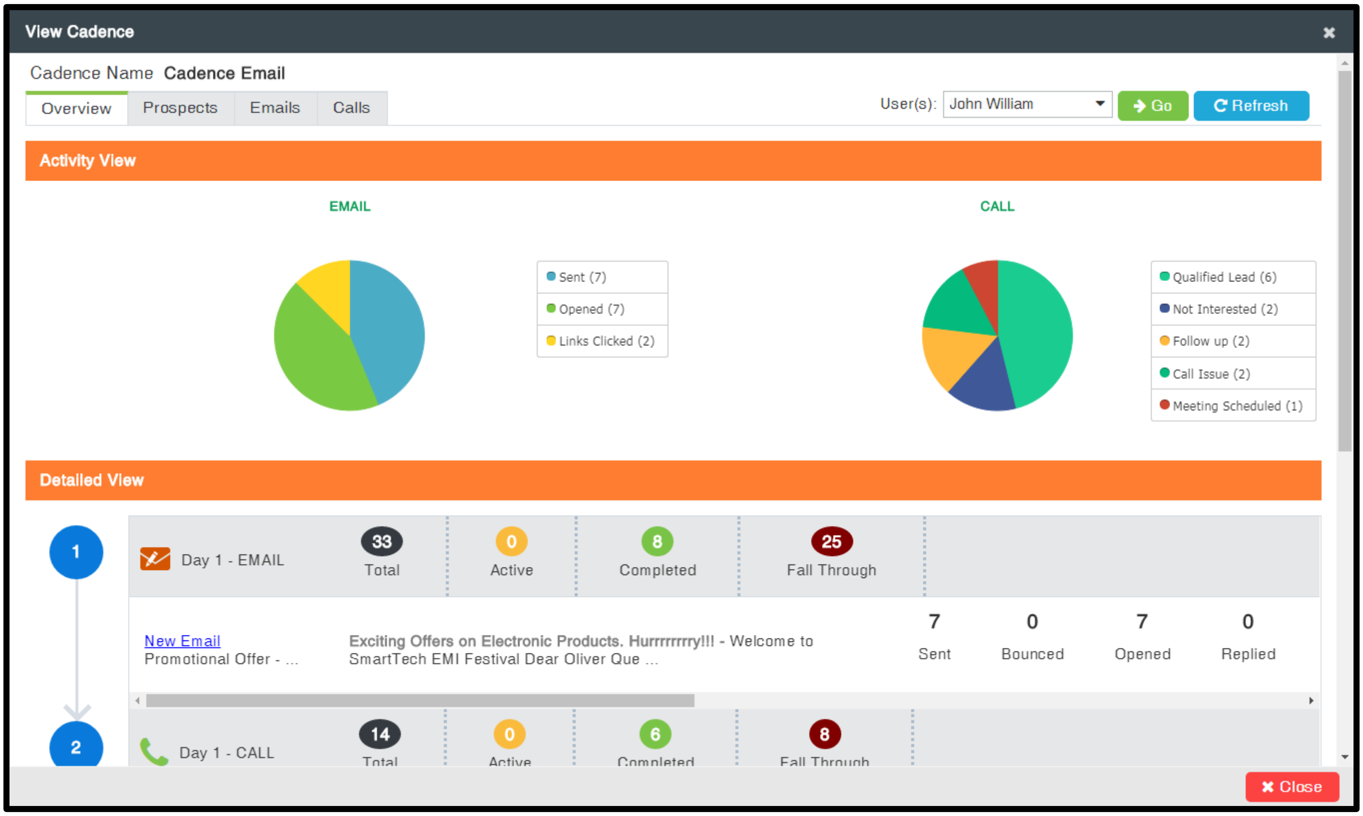
   Method - 2

   a. In the **Cadences** tab, click on the **Edit** icon to the right of the Cadence which needs to be viewed.

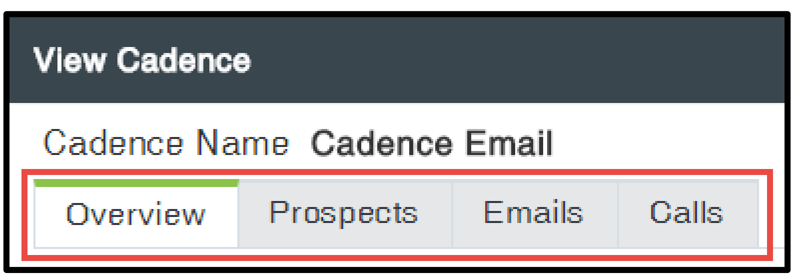


   b. Click on the **View Cadence** button on the top-right of the **Edit Cadence** window.

2. The **View Cadence** window will be displayed.



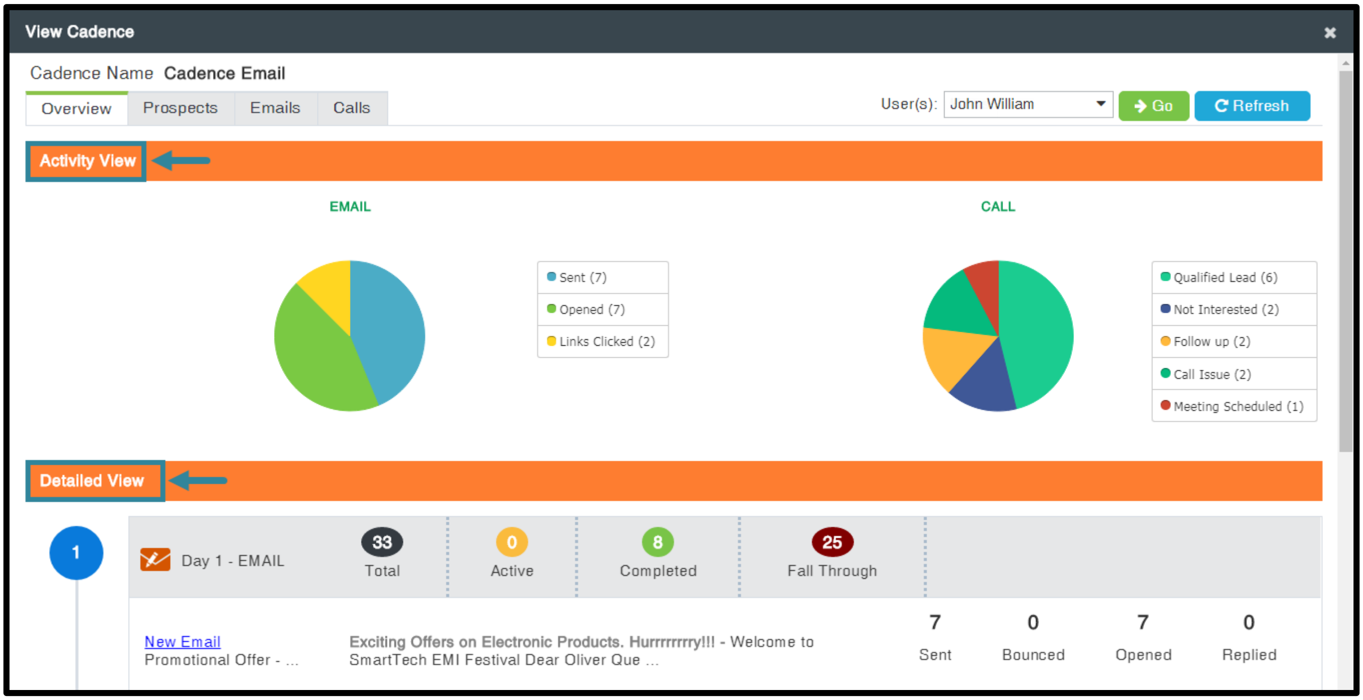
The View Cadence window has **four** tabs:



- Overview
- Prospects
- Emails
- Calls

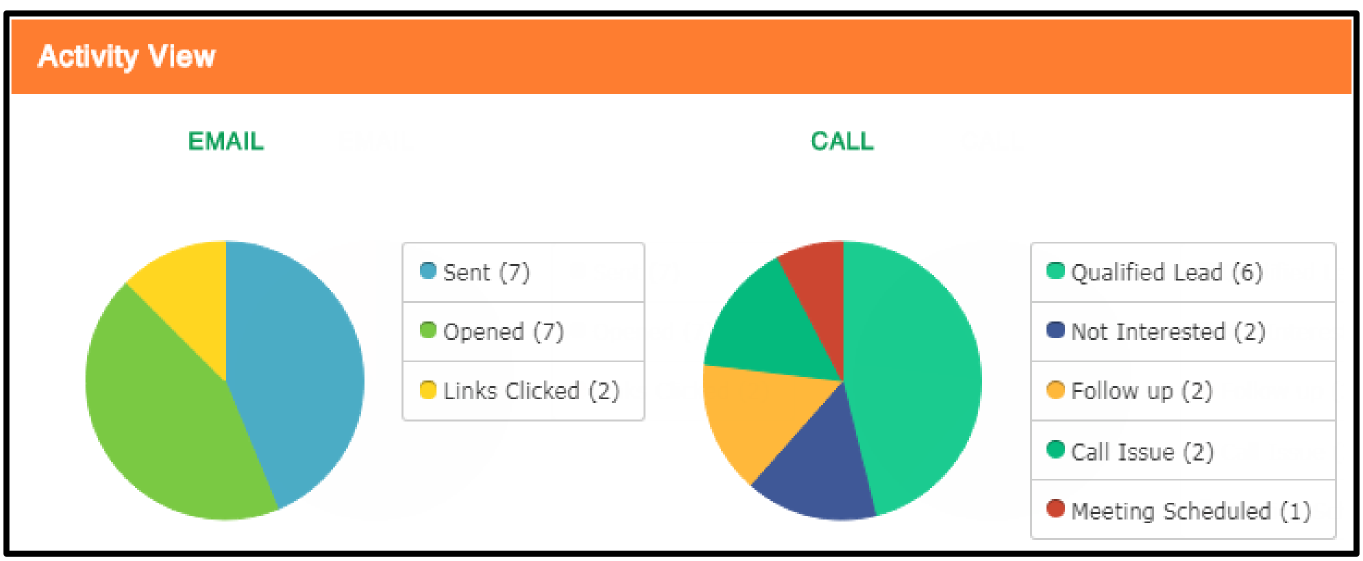
4.6.1 Overview tab

The Overview tab is used to view the overall activities performed by the user and has a detailed view of the assigned touches for the respective Cadence, under the **Activity View** and **Detailed View** sections.



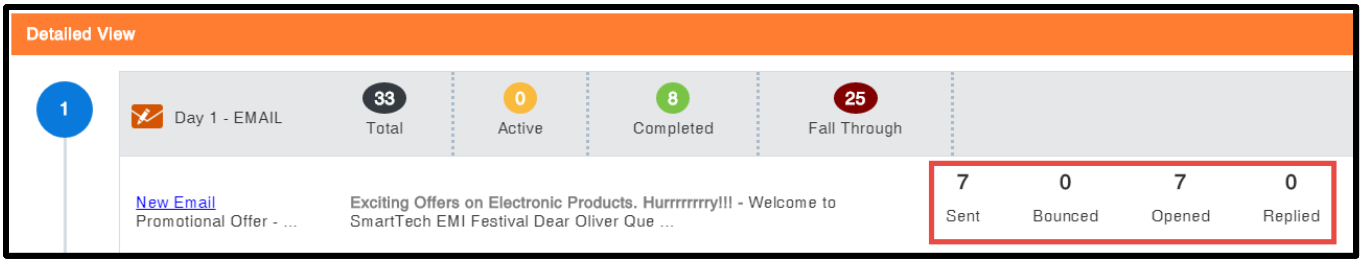
Activity View

In the **Activity View** section, a graphical representation of the assigned touch outcomes will be displayed, as shown below:



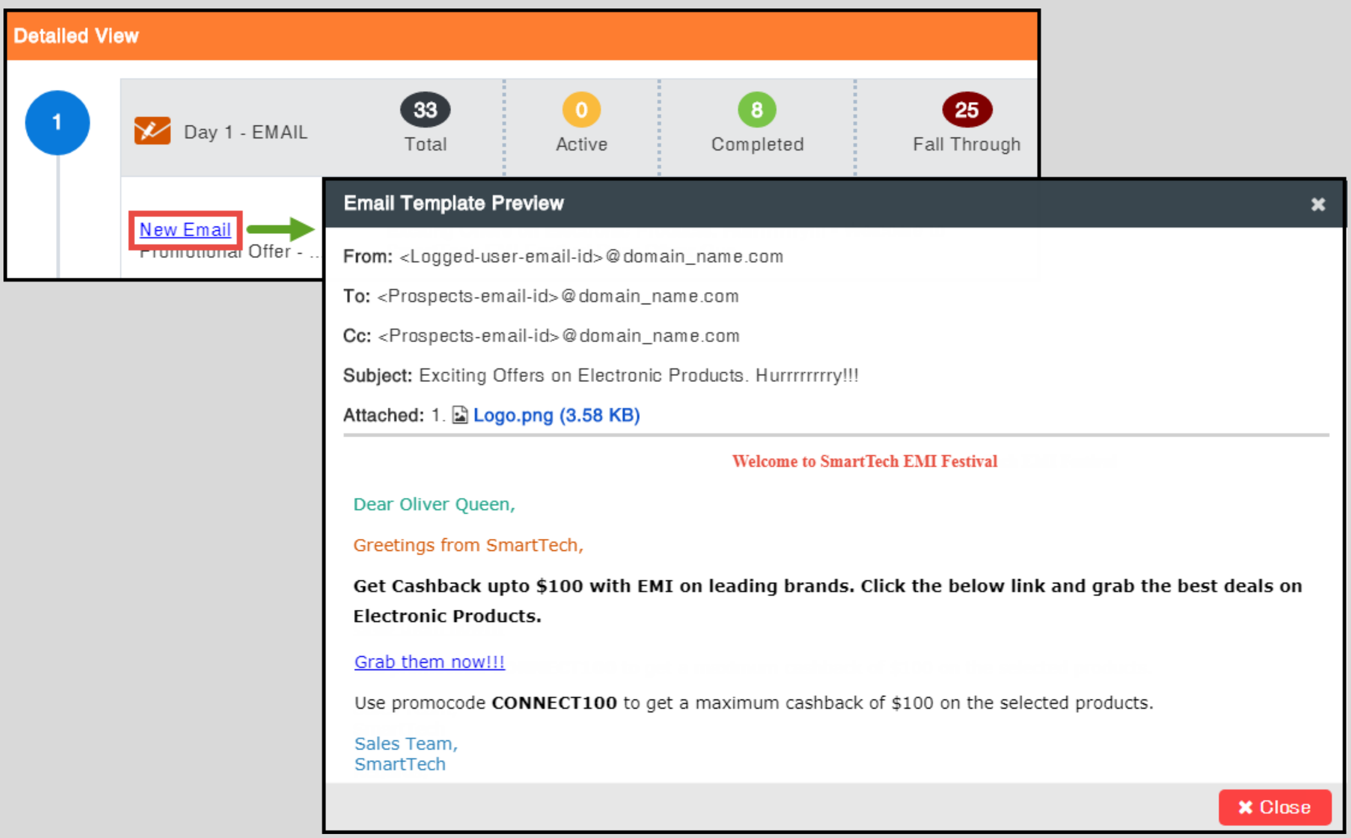
Detailed View

Here you can find the detailed information on the activities performed by the assigned touches, as shown below:



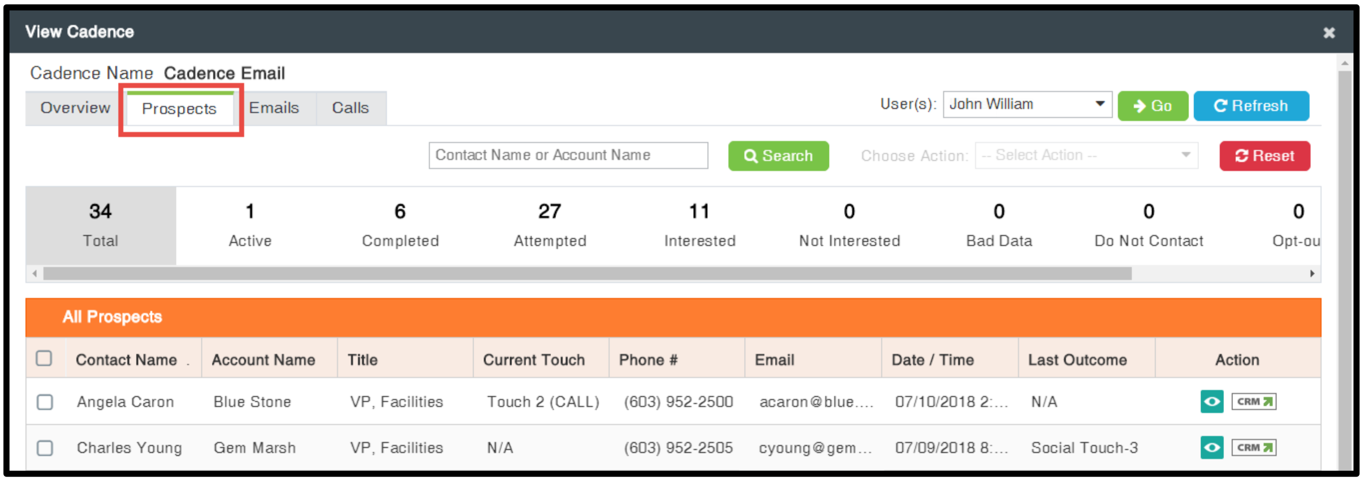
IMPORTANT NOTE

Under Email Touch, click on the link **New Email** to view/preview the email sent to the prospect.

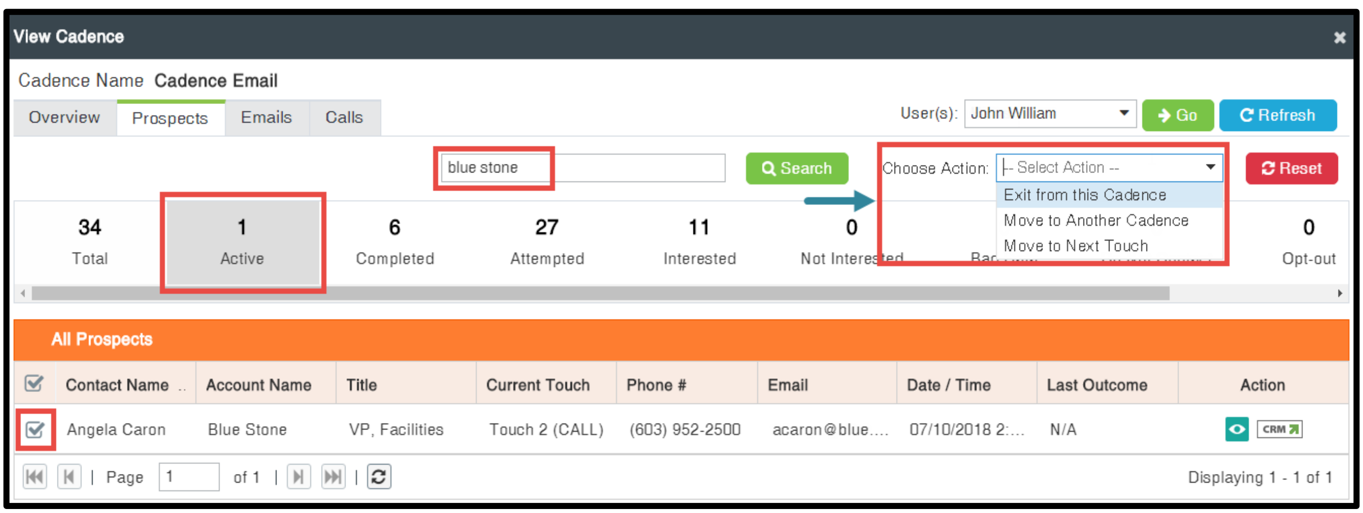


4.6.2 Prospects tab

The Prospects tab is used to view the total prospects imported under this cadence by the user.



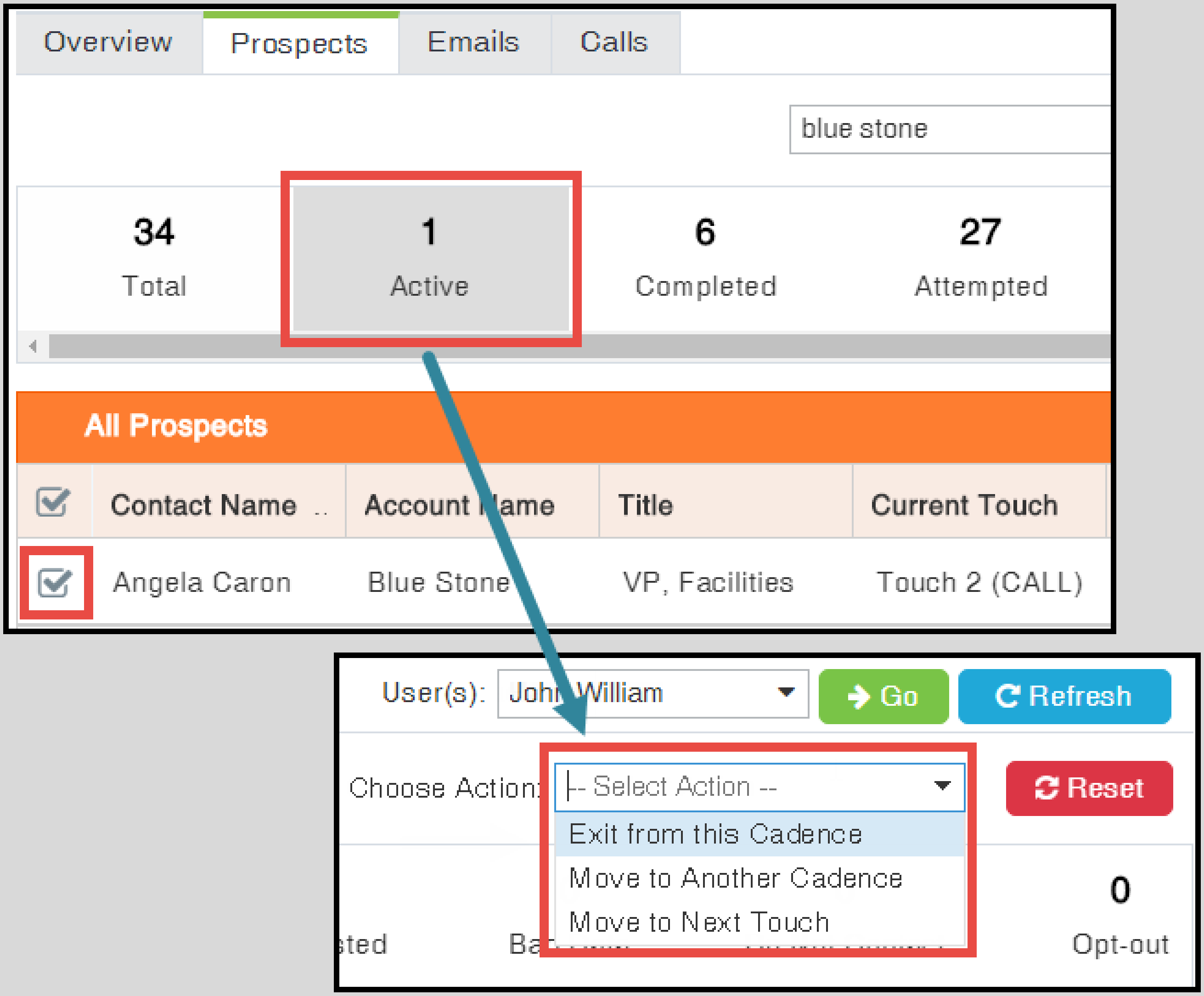
Also, you can search for a prospect and choose one of the following actions after selecting a prospect(s).



- Exit from this Cadence
- Move to Another Cadence
- Move to Next Touch

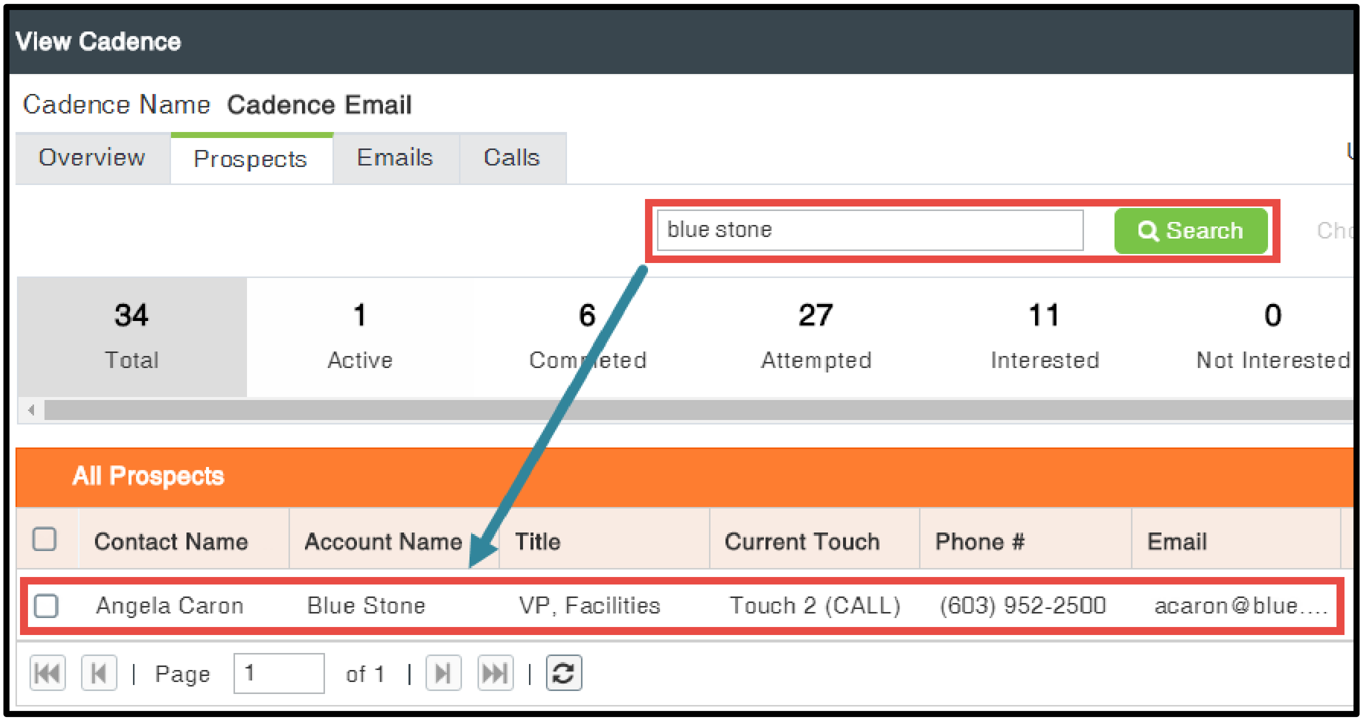
IMPORTANT NOTE

The **Choose Action** dropdown will be enabled to choose the required action, **only** if the selected prospects are **Active**.



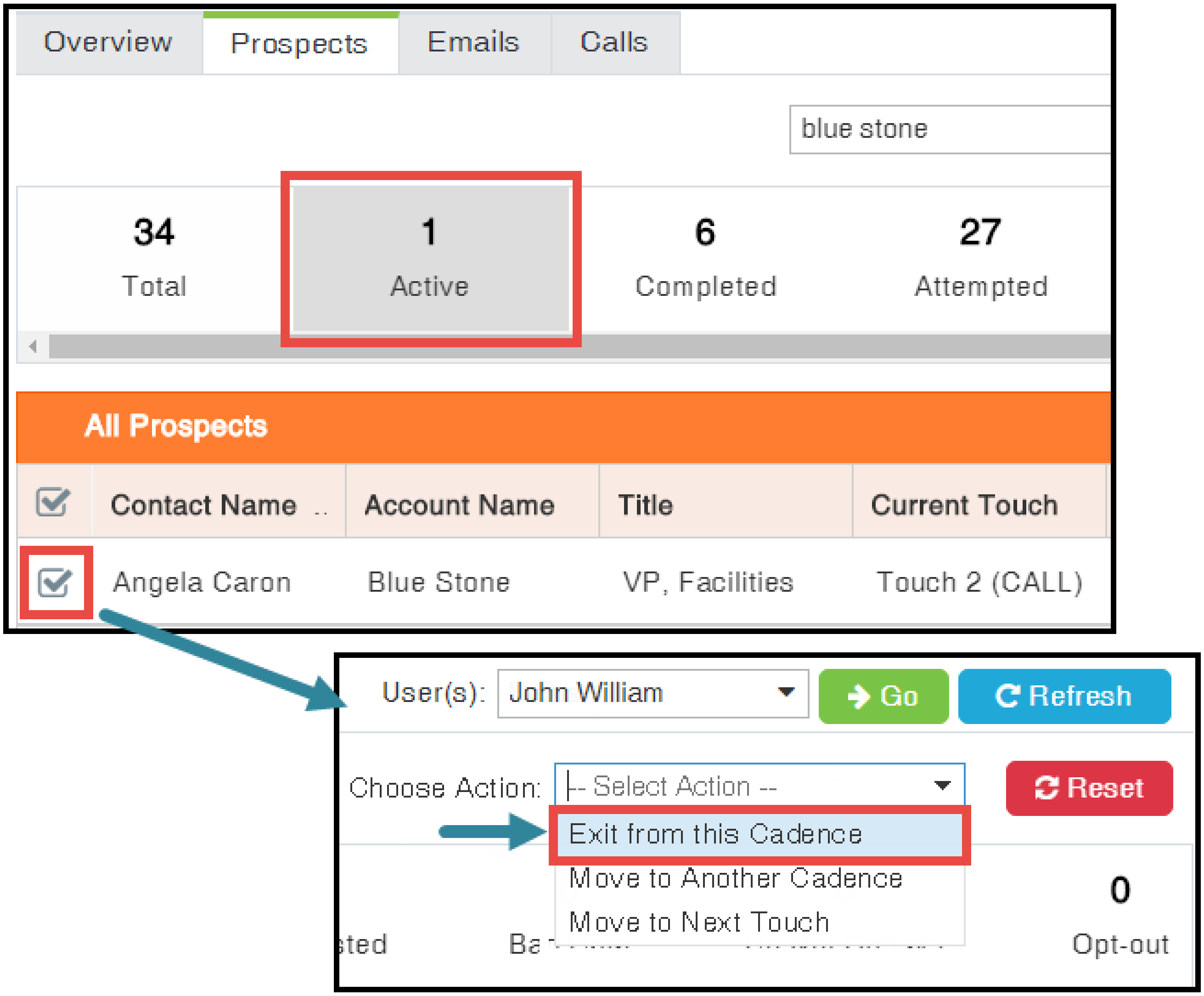
Search for a Prospect

Enter the **Account Name or Contact Name** in the available textbox and click the **Search** button. Prospect(s) who meet the search criteria will be displayed in the grid.

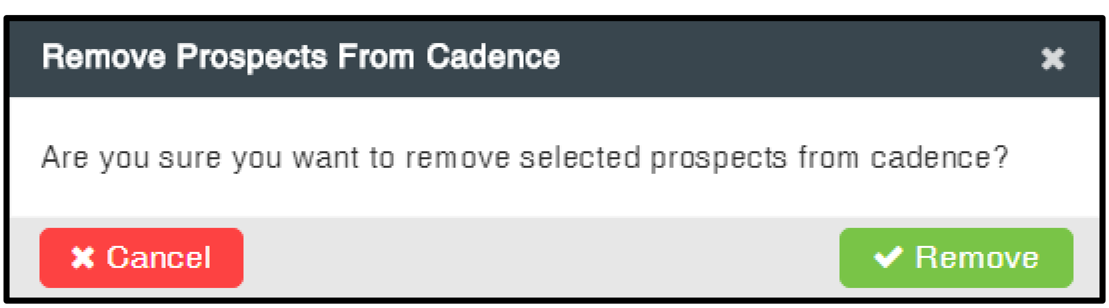


Action – Exit from this Cadence

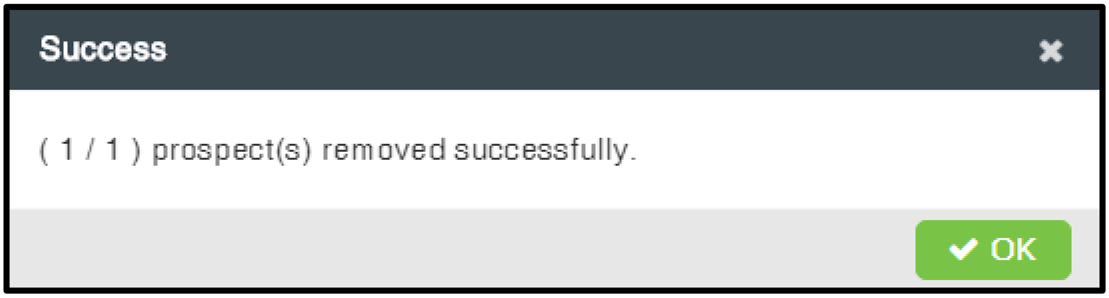
If you want to remove/exit a prospect(s) from the Cadence, select the desired prospect(s) from the grid (which are active) and select **Exit from this Cadence** from the **Choose Action** dropdown.



The following confirmation message will be displayed. Click the **Remove** button to remove the prospect from the current Cadence or click **Cancel** to cancel the process.

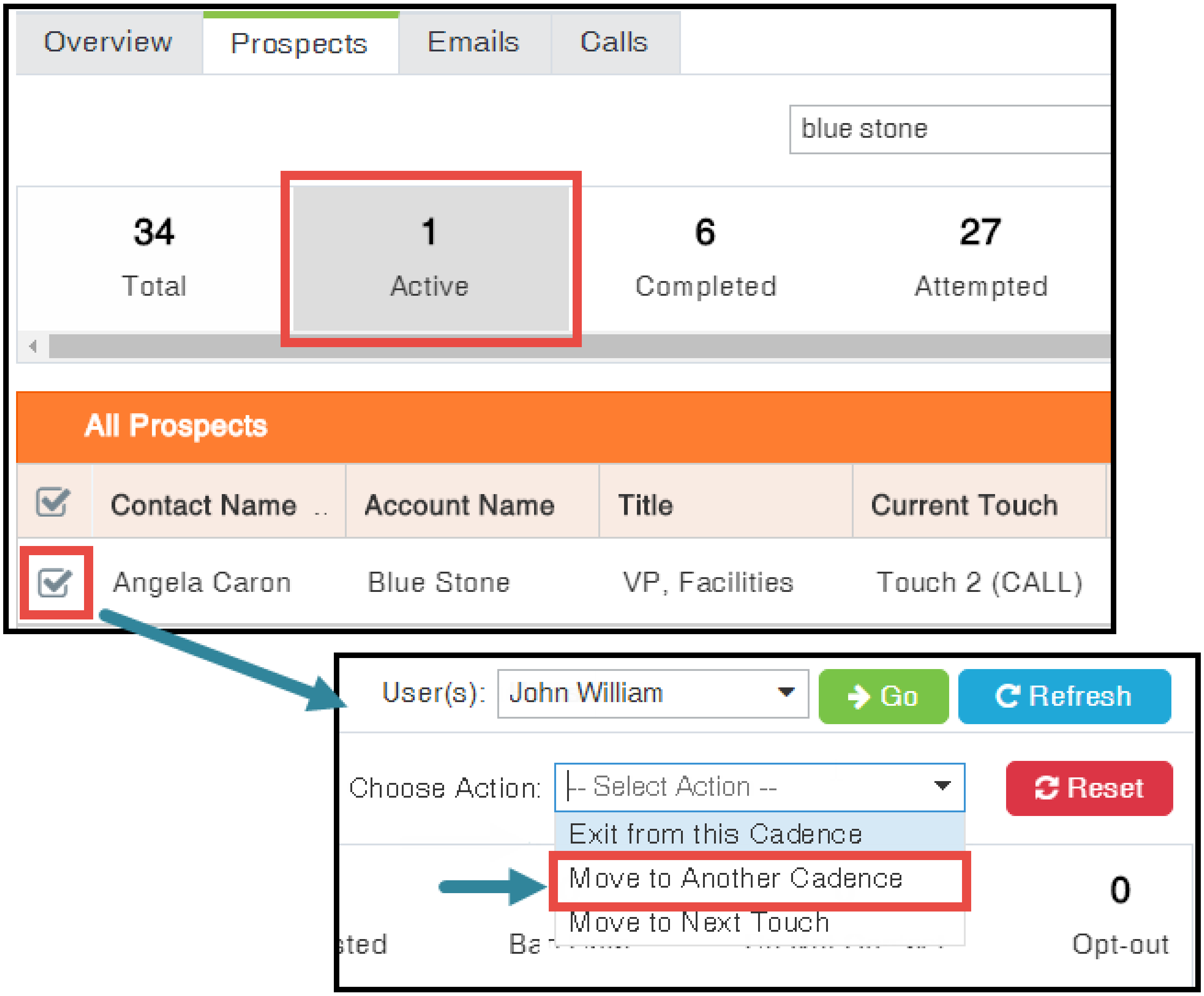


Once the selected prospect(s) are removed successfully, a success message will be displayed as shown below. Click **OK**.

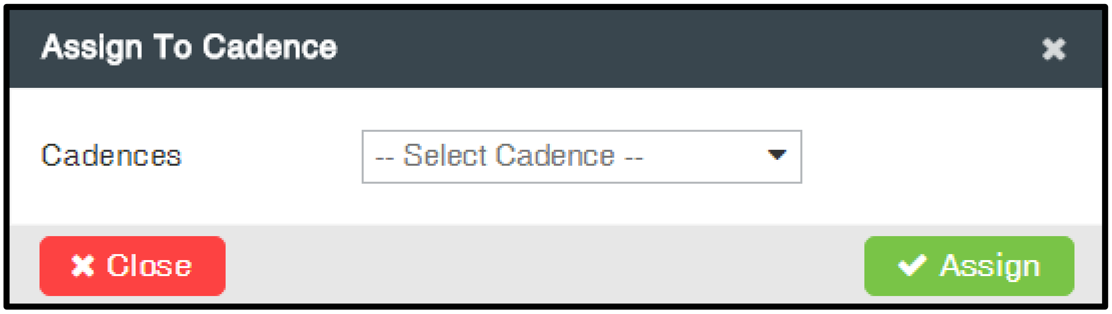


Action – Move to another Cadence

If you want to move a prospect(s) from the current Cadence to another Cadence, then select the desired prospect(s) from the grid (which are active) and select **Move to Another Cadence** from the **Choose Action** dropdown.

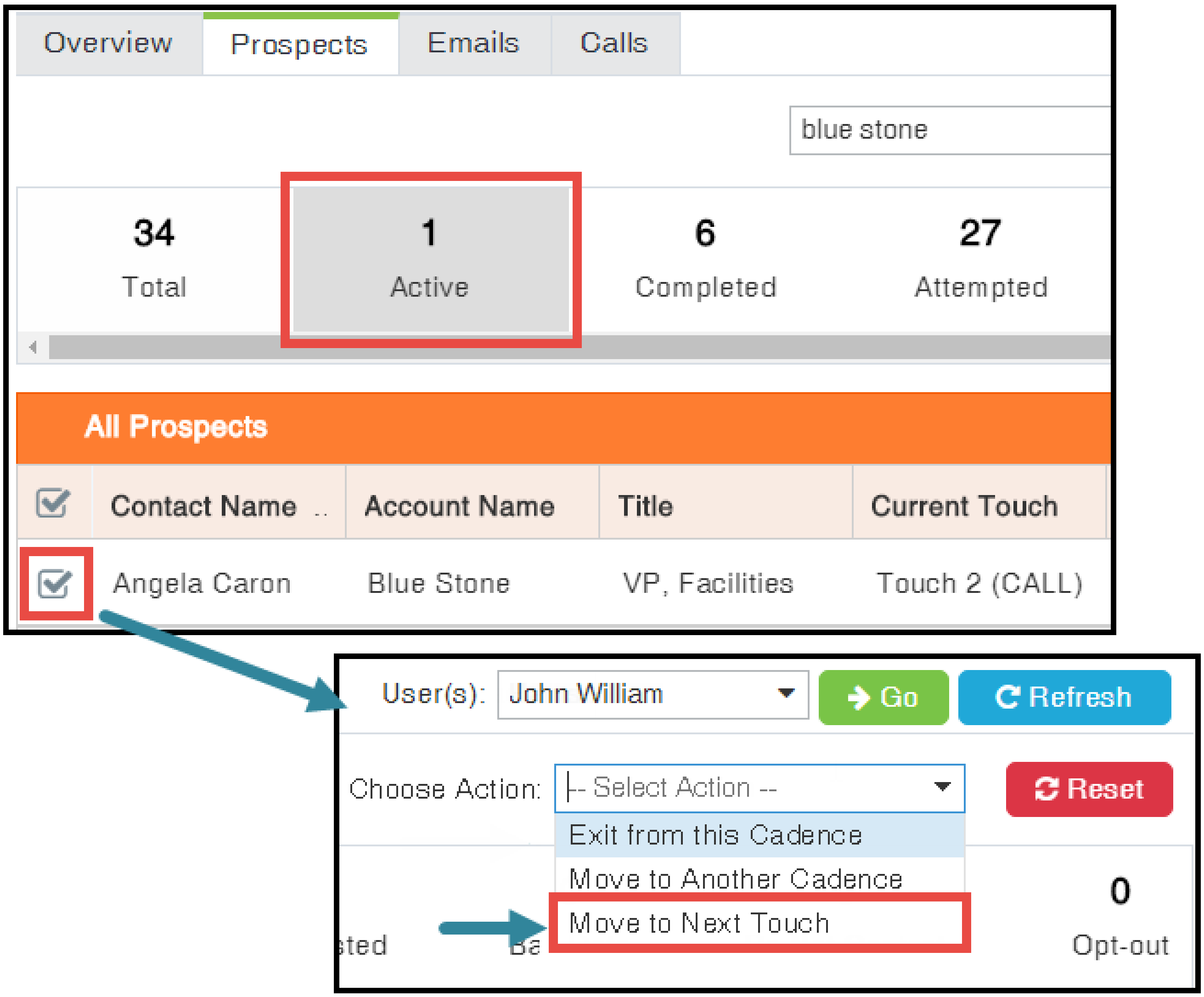


The **Assign To Cadence** popup window will be displayed. Select a cadence from the dropdown to which the selected prospect(s) should be moved and then click **Assign**.

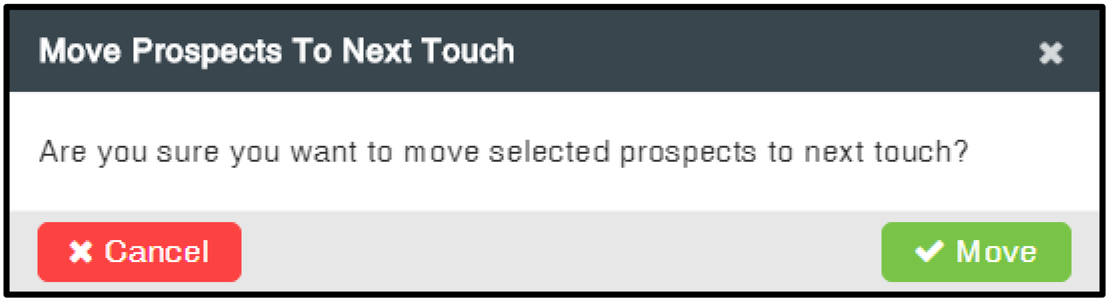


Action – Move to Next Touch

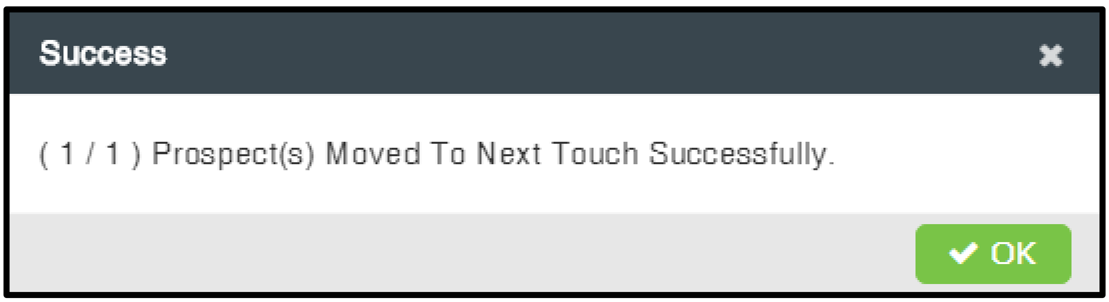
To move prospects to the Next Touch, select the desired prospects from the grid (which are active) and then select **Move to Next Touch** from the **Choose Action** dropdown.



A confirmation message will be displayed, as shown below. Click **Move** to move the selected prospects to the next touch or click **Cancel** to cancel the process.

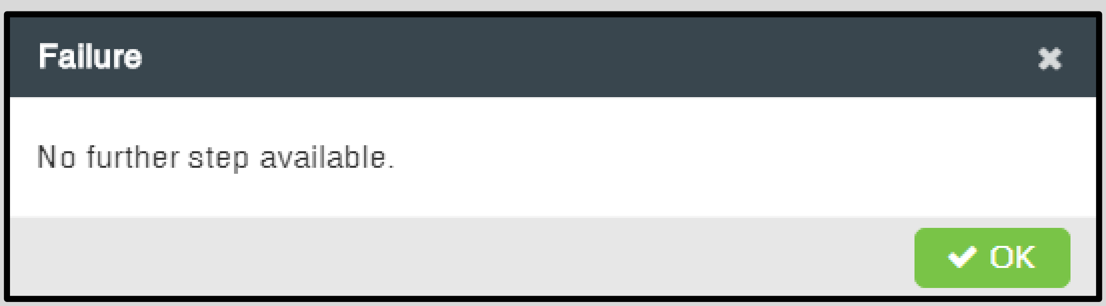


Once the selected prospect(s) are moved to the next touch successfully, a success message will be displayed as shown below. Click **OK**.



IMPORTANT NOTE

If there is no further touch available in a Cadence when clicking the **Move** button in the **Move Prospects To Next Touch** pop up window, the failure message will be displayed:

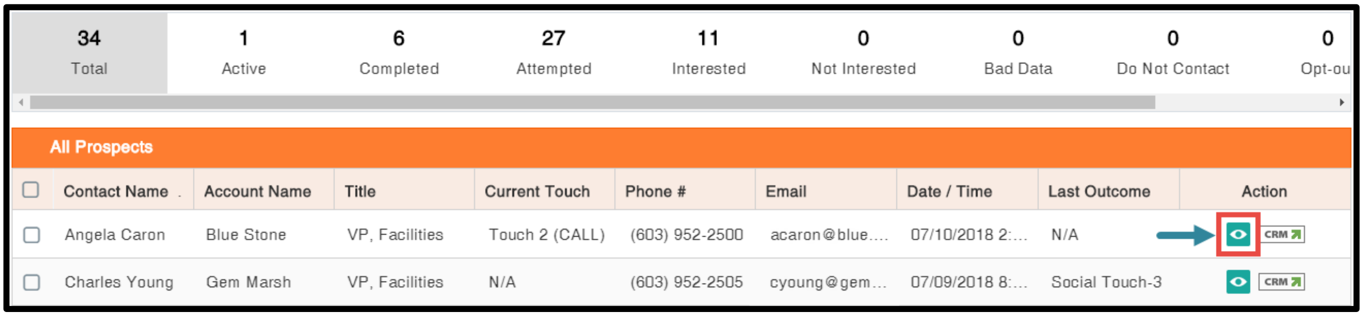


View Prospect Activities

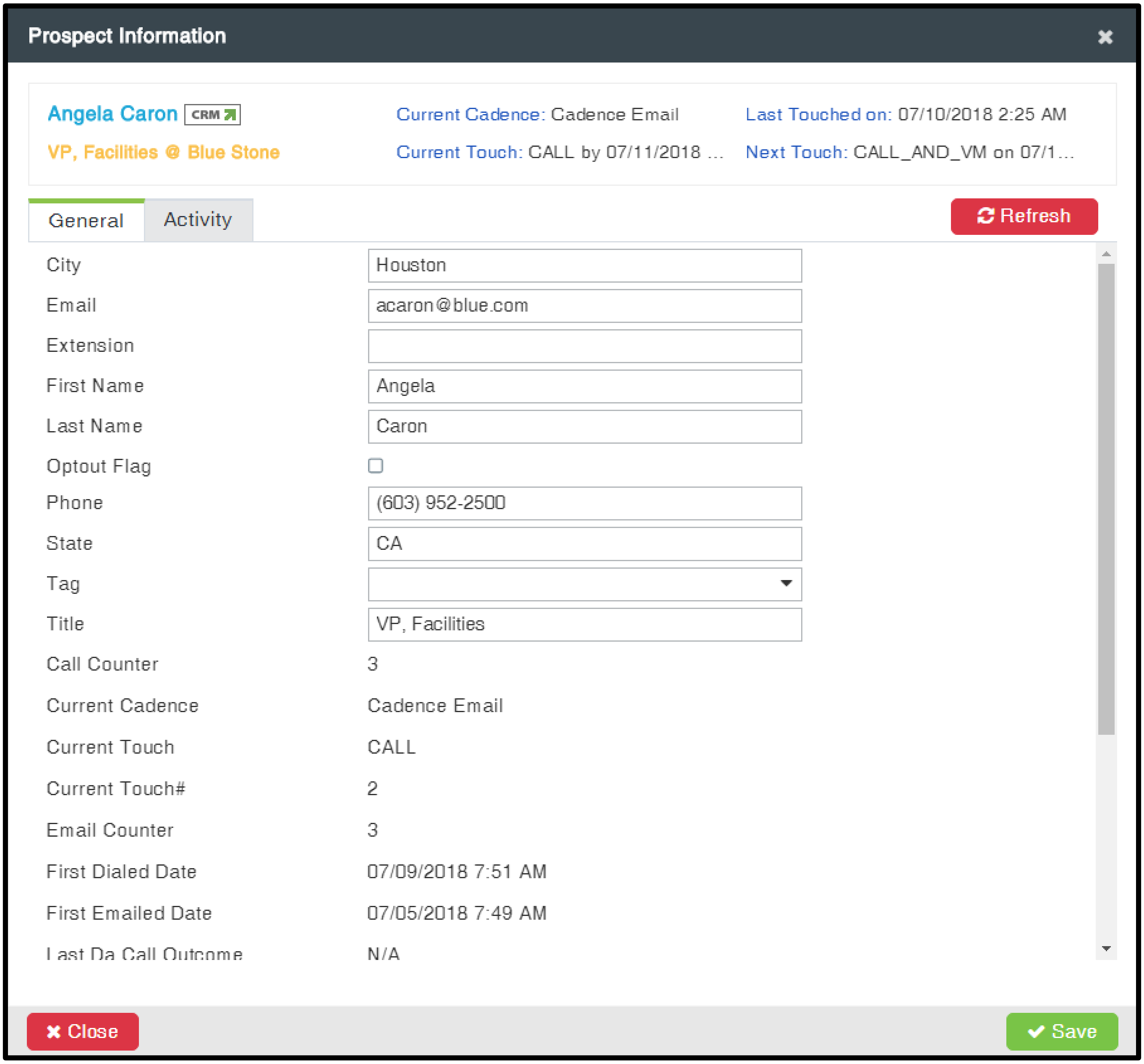
Find the steps below to view the prospect activities in detail:

1. In the **View Cadence** window ► **Prospects** tab, search for a prospect you wish to view.

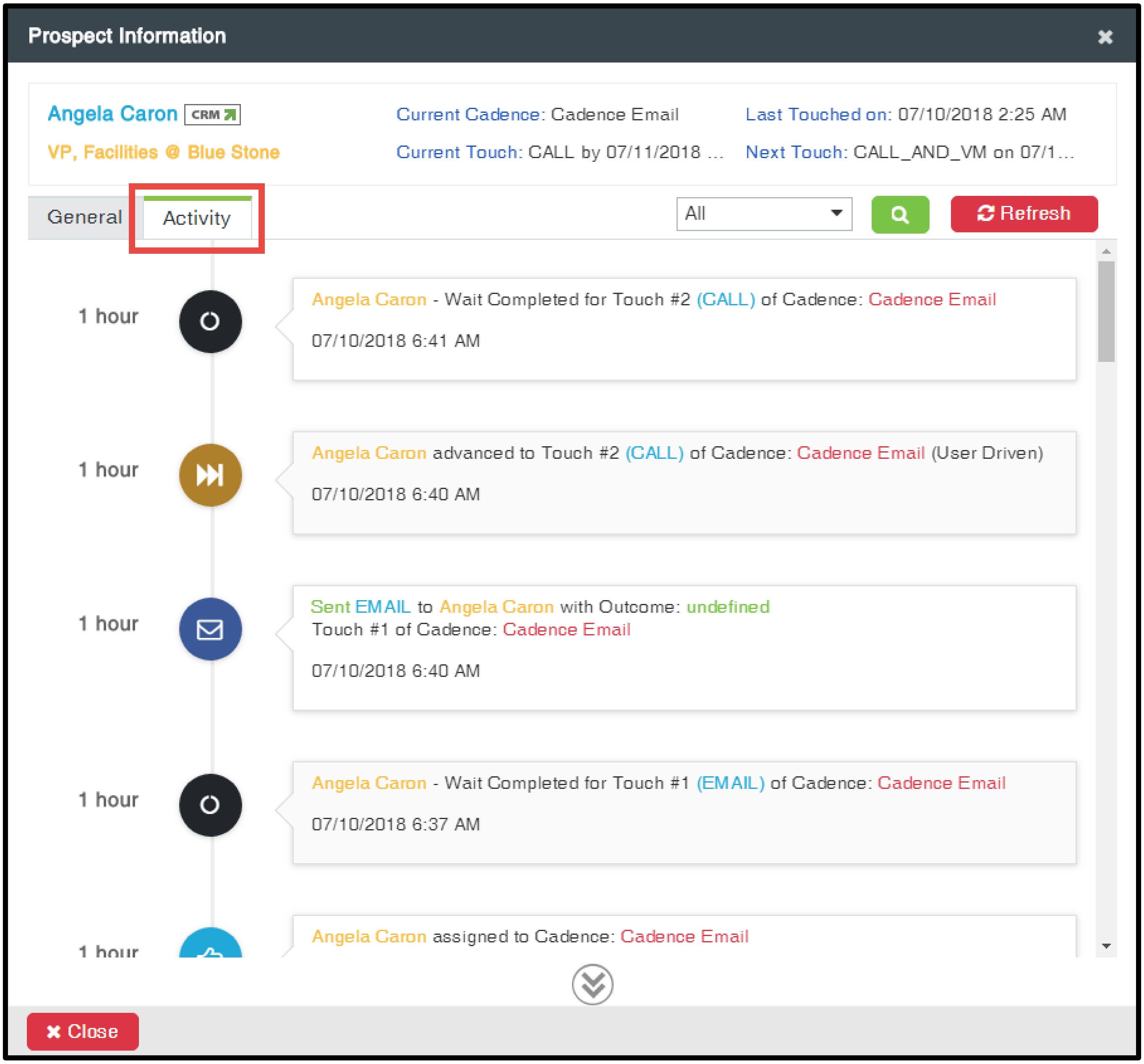
2. Click on the **View** icon  to the right of the prospect.



3. The **Prospect Information** window will be displayed, here you can find the prospect information and the activities performed, in detail.



4. Click on the **Activity** tab of **Prospect Information** window to view the activities performed on the prospect.



5. If needed, you can make changes and click **Save** to save the changes.

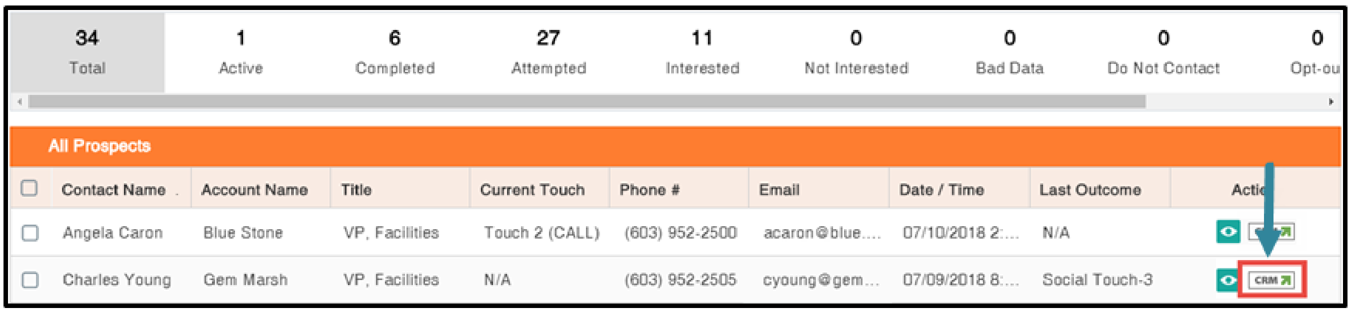
Open CRM Window (only for CRM users)

In the **View Cadence** window ► **Prospects** tab, you can view and update (if required) the prospect's information directly into the CRM.

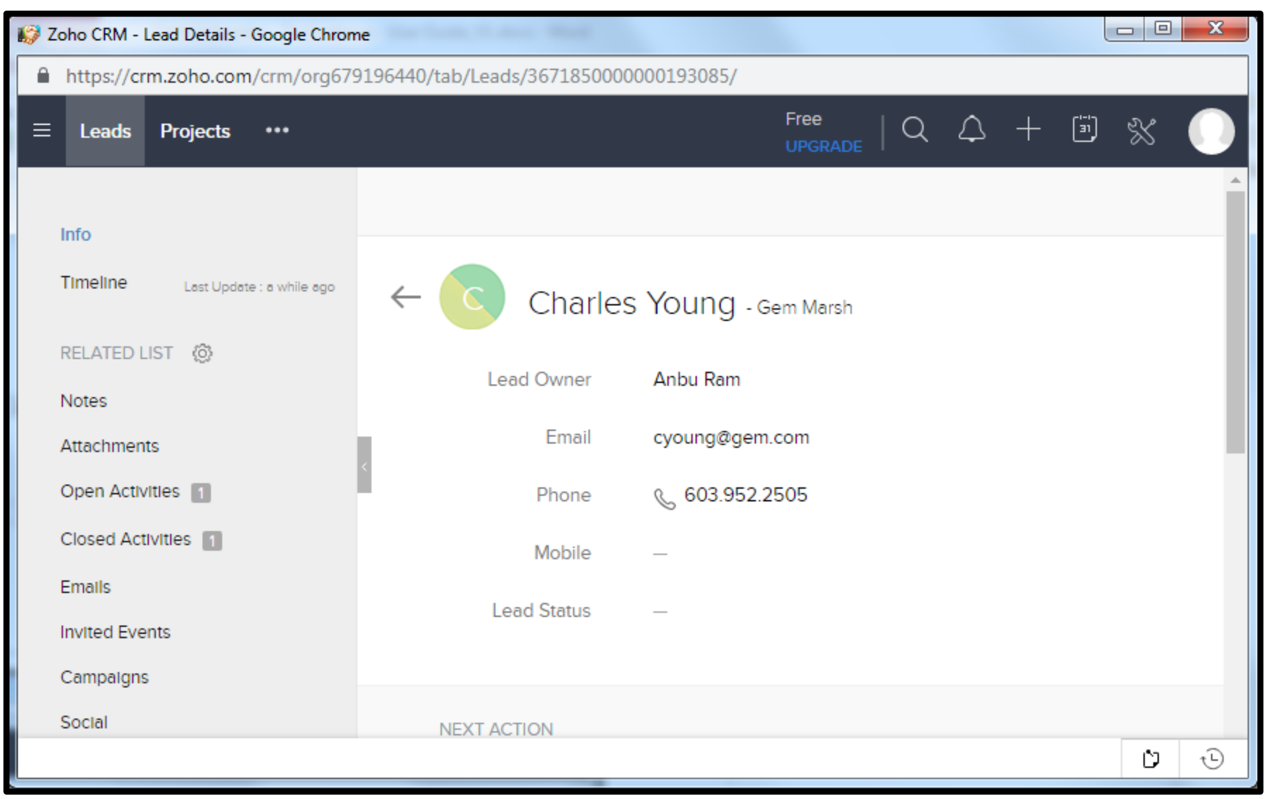
NOTE: The CRM button will be displayed **only for CRM users**.

Find the steps below to view the prospect information from CRM:

1. In the **View Cadence** window ► **Prospects** tab, click on the **CRM** button CRM to the right of the prospect you wish to view.

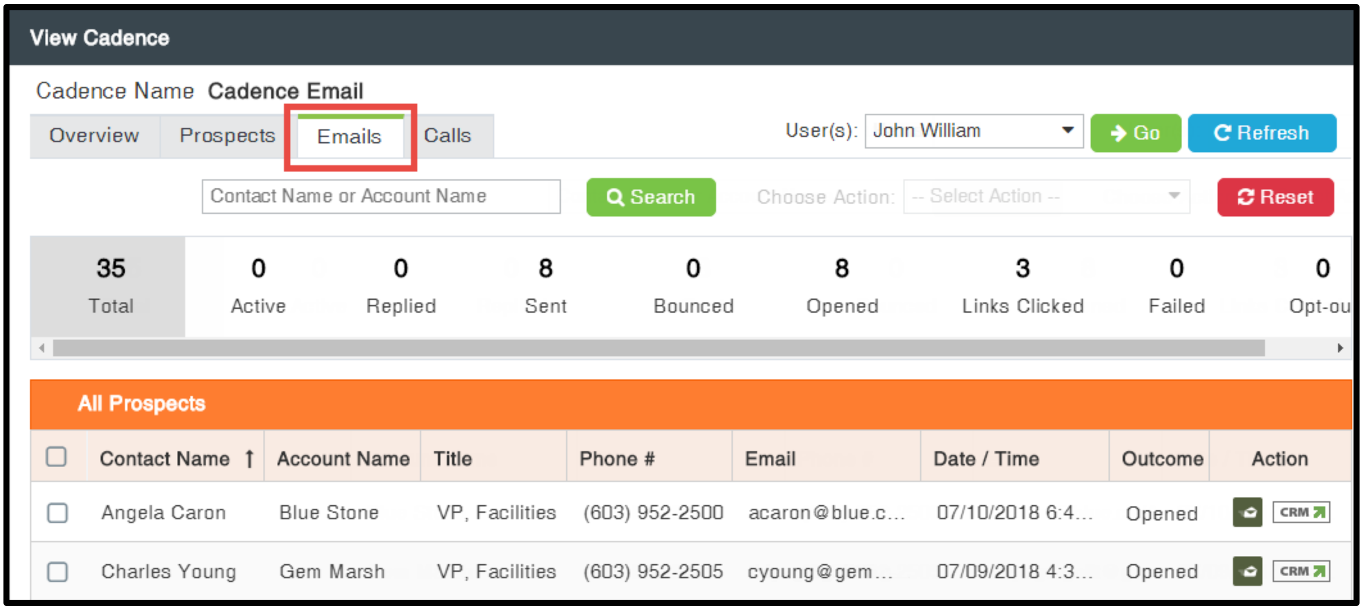


2. The CRM window with the respective prospect's information will be displayed. If needed, you can edit the prospect information by clicking the **Edit** button.

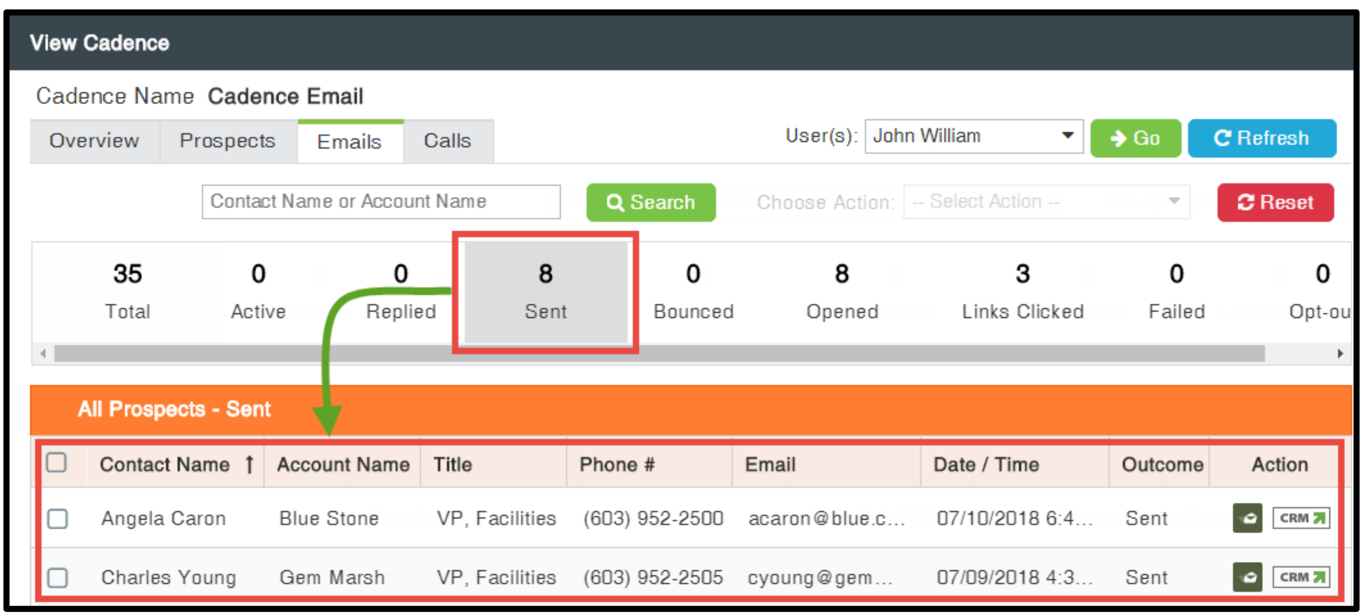


4.6.3 Emails tab

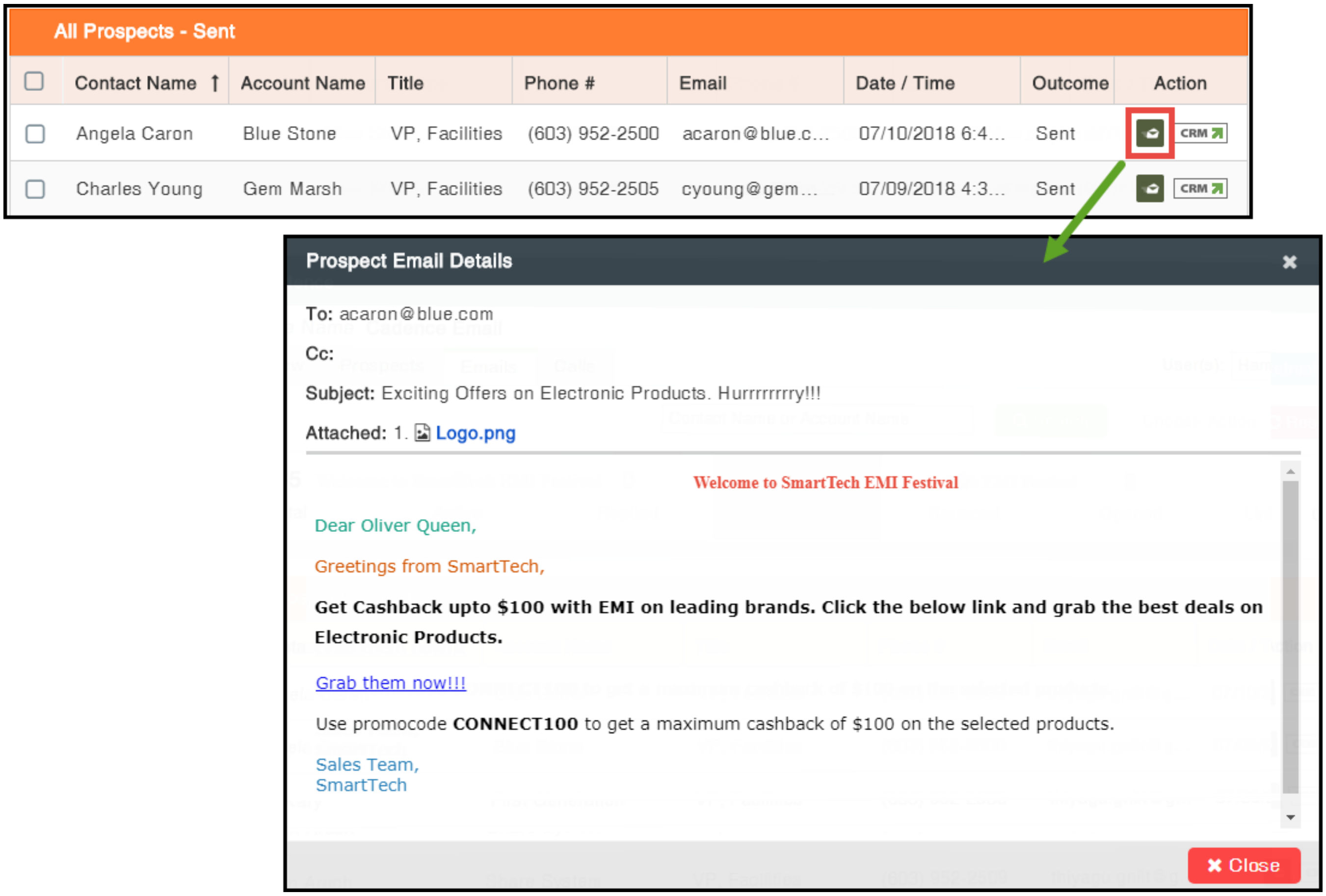
The **Emails** tab is used to view all Email metrics of the prospects under this Cadence, this includes – Total Emails Sent, Active, Bounced, Failed, Links Clicked, Opened, Replied, and Opt-out.



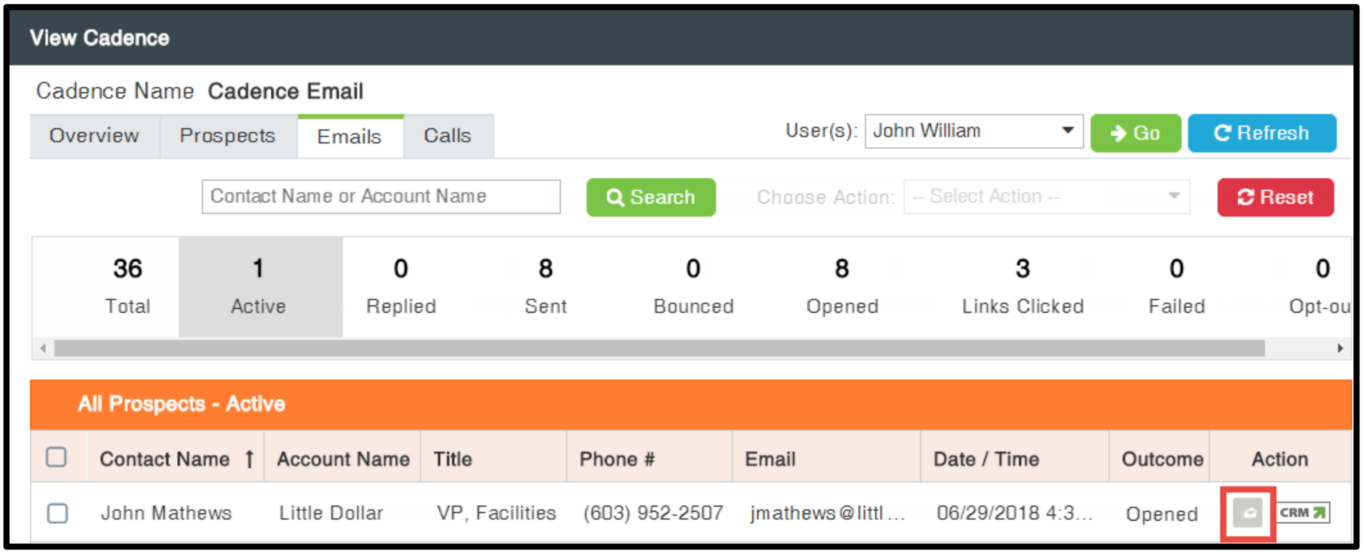
By clicking on each Email metric, all prospects in the corresponding metric will be displayed at the bottom. For instance, by clicking on the metric **Sent**, prospects to whom the emails were sent successfully will be displayed.



From the Emails tab, you can view the email that was sent successfully by clicking the **View Email** icon to the right of the respective prospect.

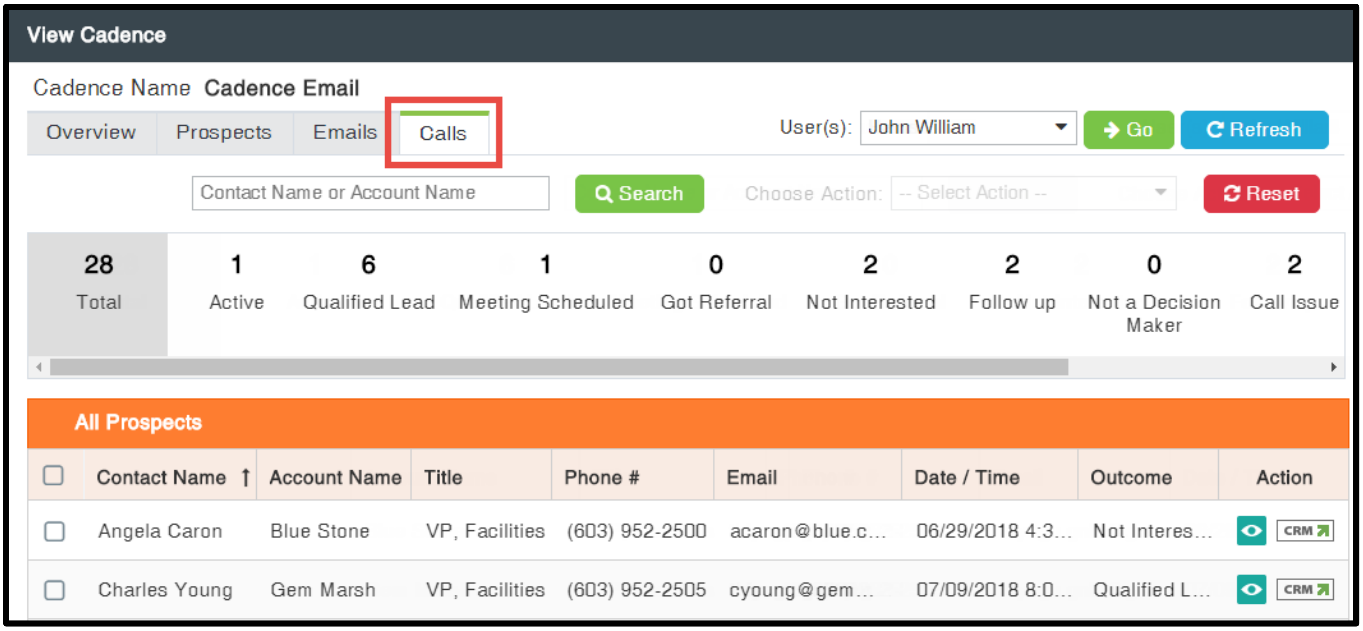


For pending emails i.e. emails that were not sent to the prospects the **View Email** icon will be inactive .

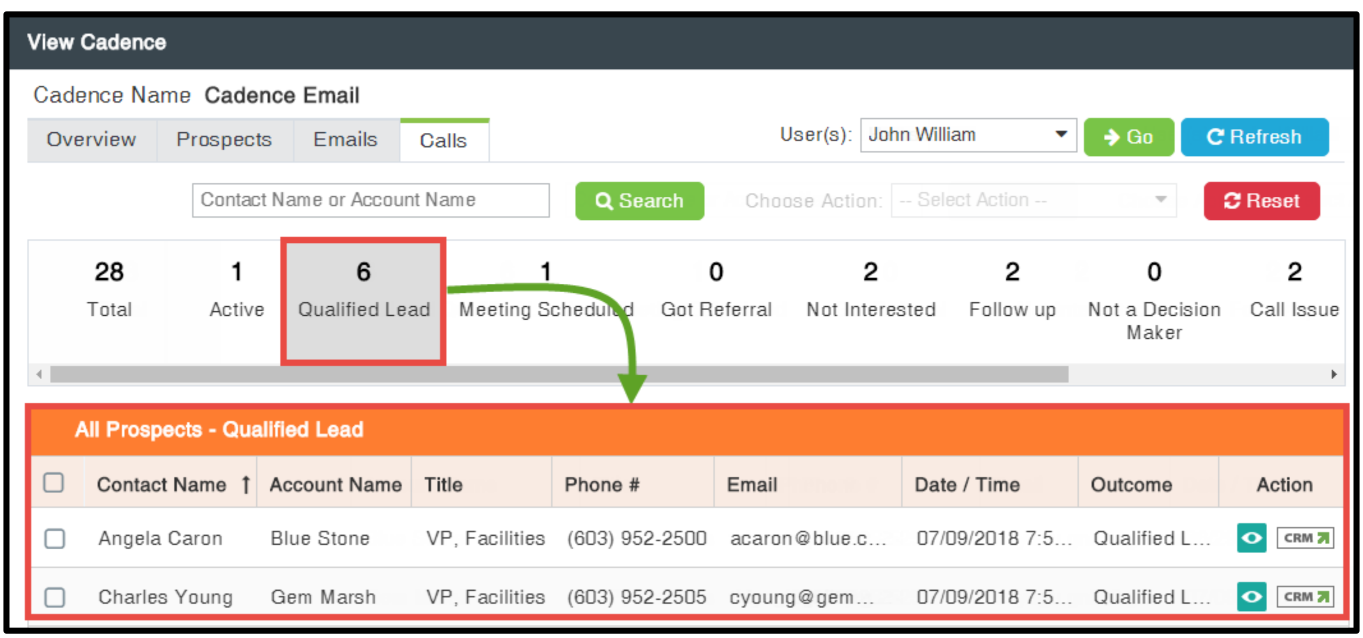

View Cadence
Cadence Name Cadence Email
Overview
Prospects
Emails
Calls
User(s): John William
Go
Refresh
Contact Name or Account Name
Search
Choose Action: -- Select Action --
Reset
36 Total
1 Active
0 Replied
8 Sent
0 Bounced
8 Opened
3 Links Clicked
0 Failed
0 Opt-ou
All Prospects - Active
Contact Name
Account Name
Title
Phone #
Email
Date / Time
Outcome
Action
John Mathews
Little Dollar
VP, Facilities
(603) 952-2507
jmathews@littl…
06/29/2018 4:3…
Opened
CRM

4.6.4 Calls tab

The **Calls** tab is used to view the complete Call metrics of the prospects under this Cadence that includes – Total dials made, Active, Qualified Lead, Meeting Scheduled, etc.

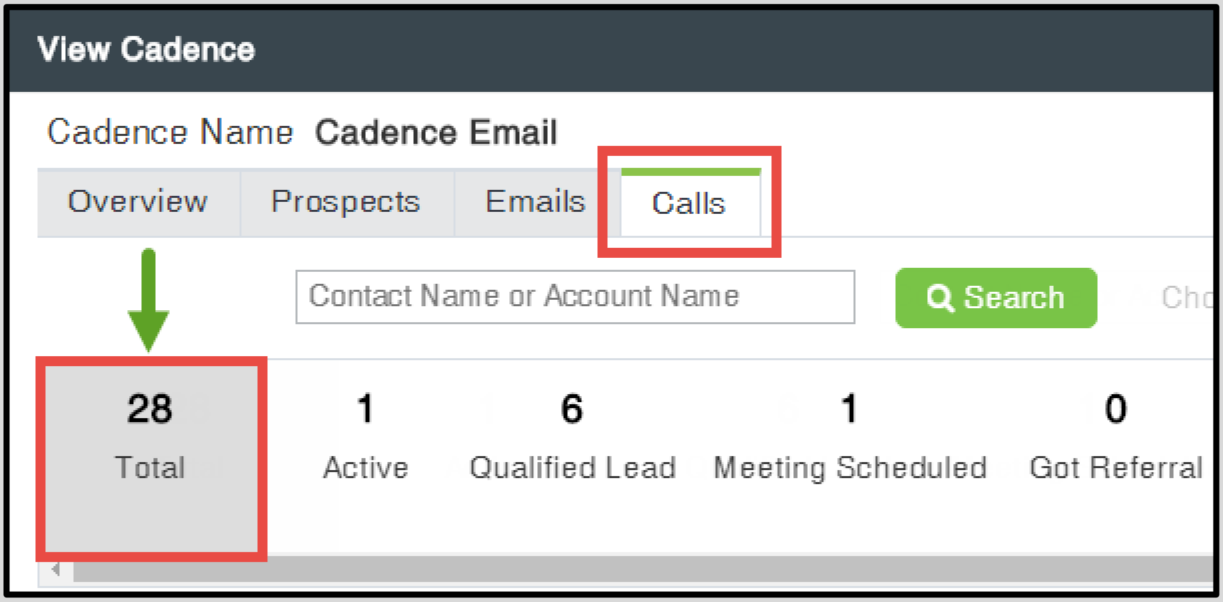


By clicking on each call metric, all prospects in the corresponding metric will be displayed at the bottom. For instance, by clicking on the metrics **Qualified Lead**, prospects logged under qualified lead will be displayed.



IMPORTANT NOTE

In the **View Cadence ► Calls** tab, the **Total** count field includes deleted prospects, but you cannot view those prospects.

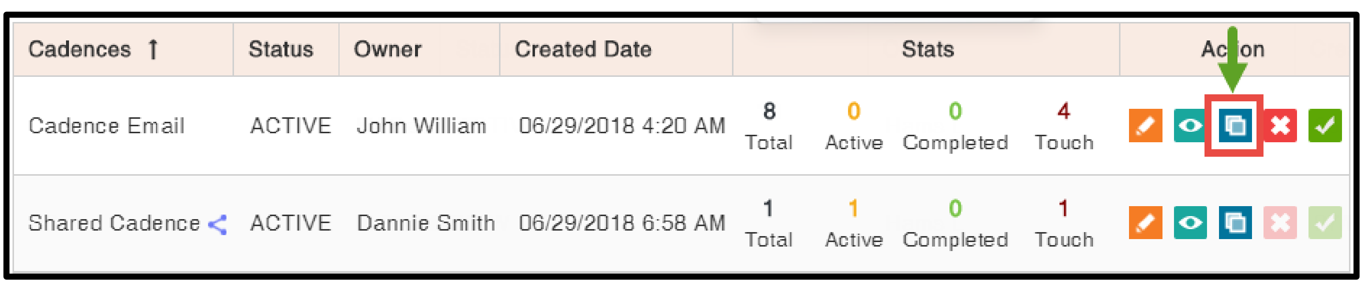


4.7 Clone a Cadence

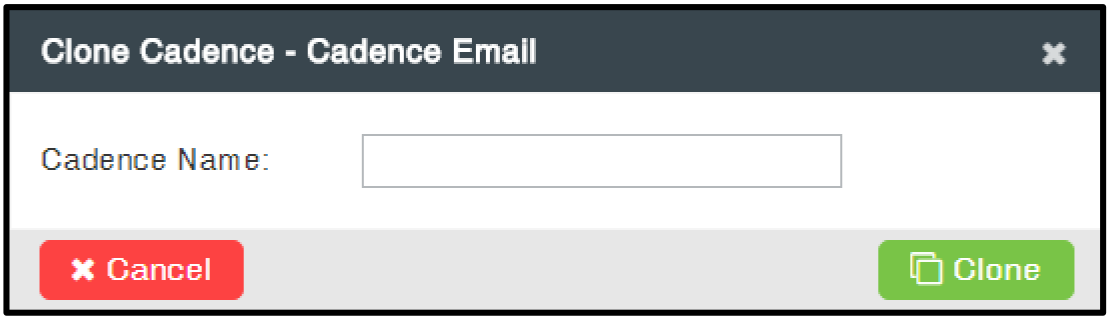
Find the steps below to clone a Cadence:

1. In the **Cadences** tab, search for the Cadence you wish to clone.

2. Click on the **Clone** icon to the right of the Cadence.



3. The **Clone Cadence** window will open and you will be asked to enter a new name in the **Cadence Name** field.

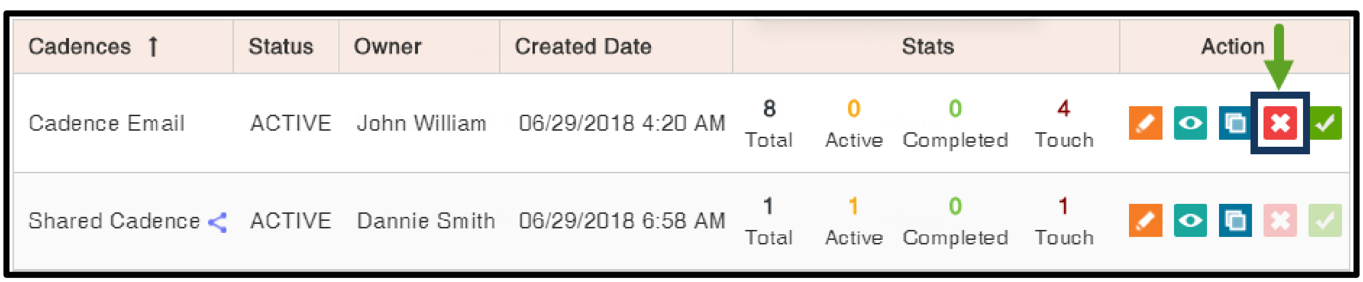


4. Click **Clone** to clone a Cadence or click **Cancel** to cancel the process.

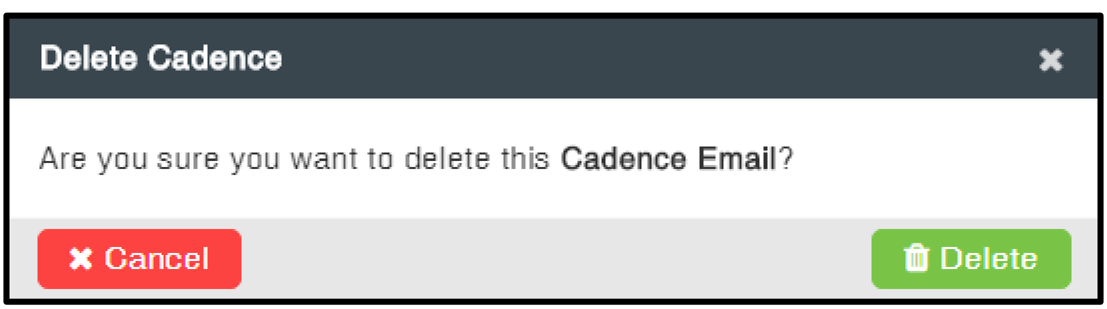
4.8 Delete a Cadence

Find the steps below to delete a Cadence:

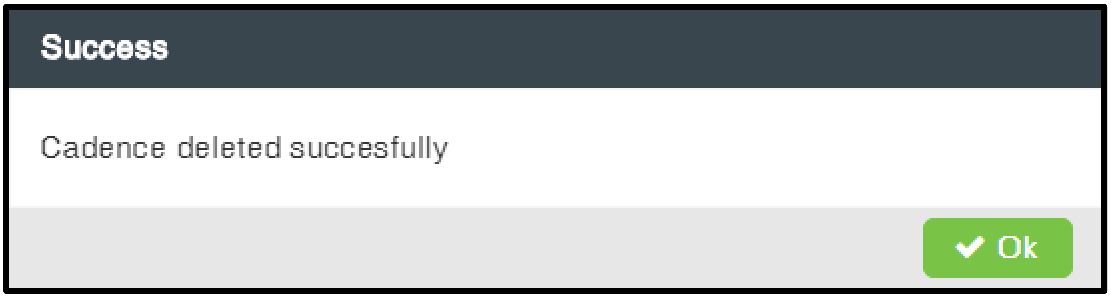
1. In the **Cadences** tab, search for the cadence you wish to delete.
2. Click on the **Delete** icon to the right of the cadence.



3. A confirmation message will be displayed as shown below. Click **Delete** to delete the cadence or click **Cancel** to cancel the process.

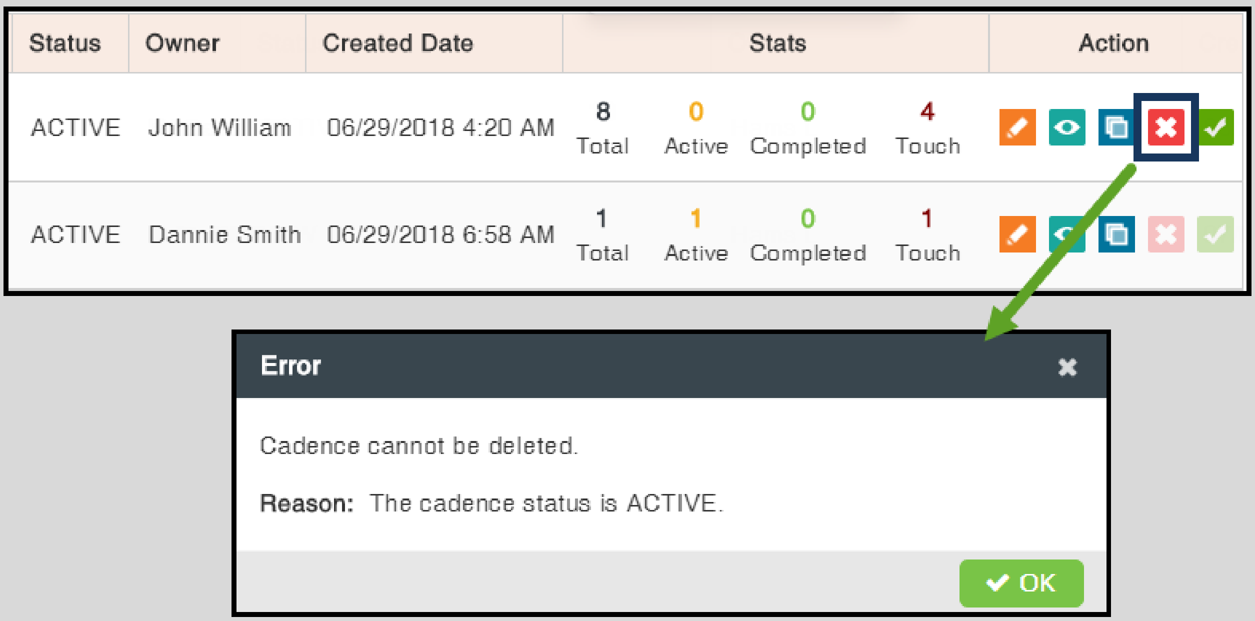


After successful deletion, a success message will be displayed as shown below. Click **OK**.



IMPORTANT NOTE

Cadences that are in ‘**New**’ status can only be deleted. When trying to delete a Cadence in **Active** status i.e. cadence with prospects added, the following error message will be displayed:



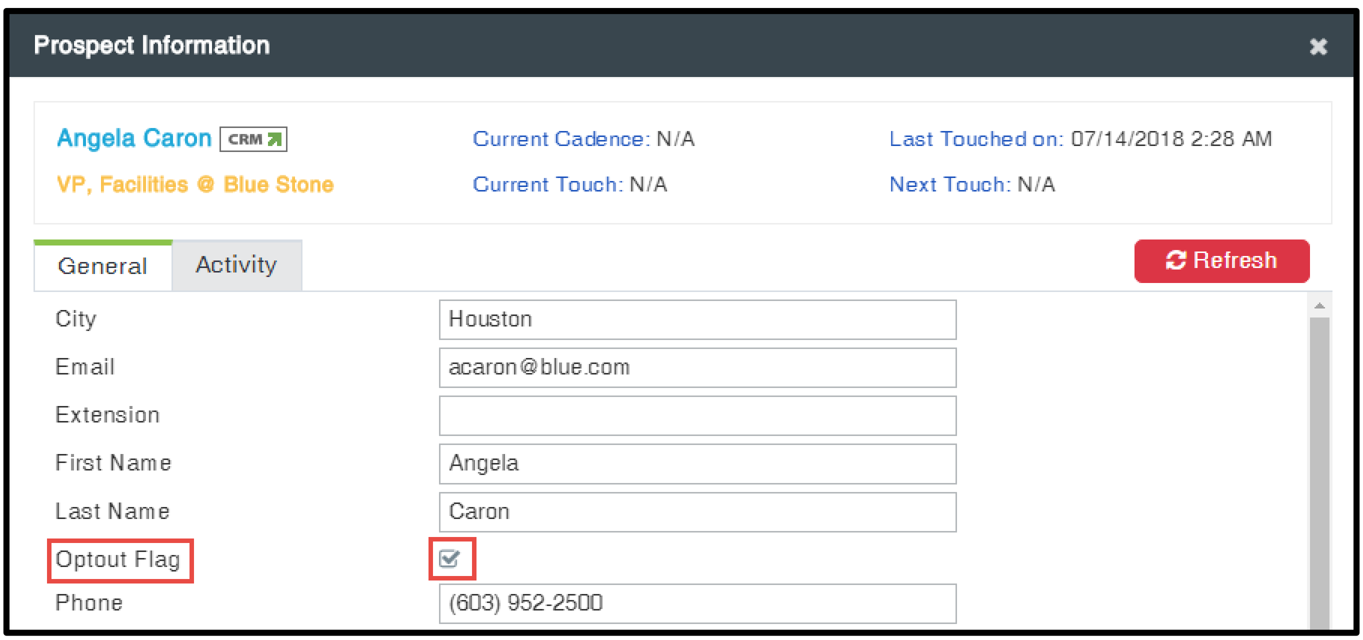
4.9 Email Optout

If the user does not wish to receive emails from TruCadence, then check the option '**Optout Flag**' in the **Prospect Information** window for the respective prospect.

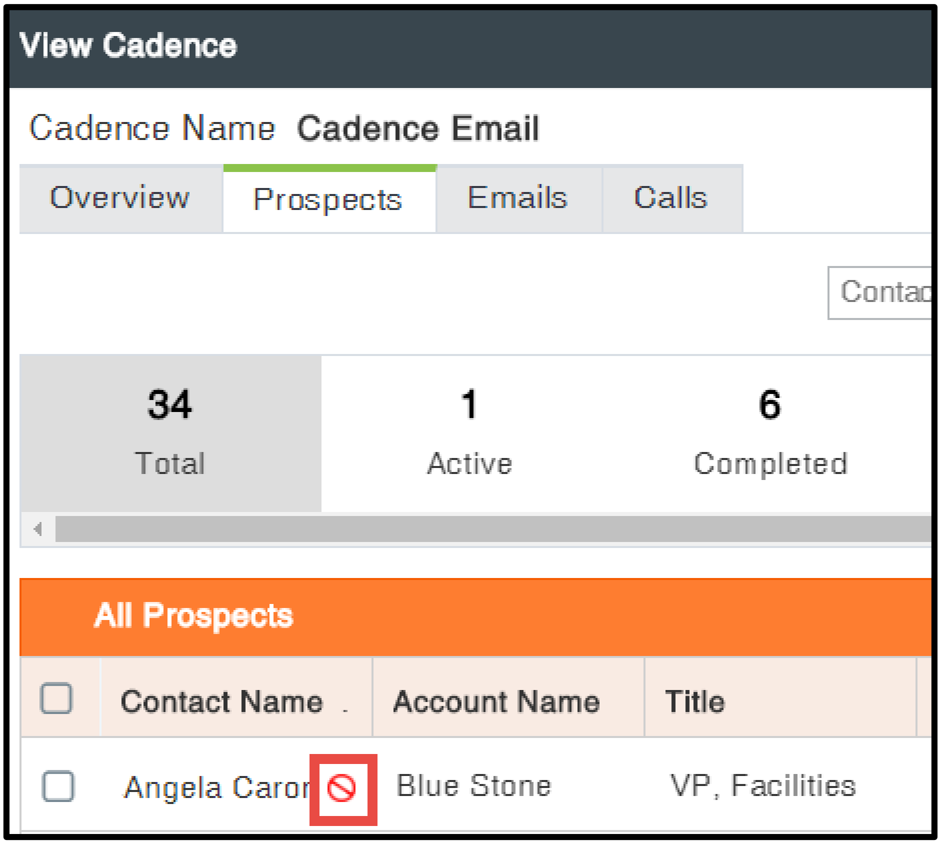
The **Prospect Information** window can be accessed from the following tabs:

Navigation	TruCadence ► Cadences tab ► View Cadence ► Prospects tab ► View Prospect TruCadence ► Prospects tab ► View Prospect TruCadence ► Pending Calls tab ► View Prospect TruCadence ► To Do tab ► View Prospect

In the **Prospect Information** window, select the option '**Optout Flag**' and click **Save** to save the changes made.



The **Prospect Optout** icon will be displayed next to the **Contact Name** of the prospect, indicating that the prospect has opted out on receiving emails from TruCadence.



Even if the selected prospect is assigned to a Cadence containing Email Touch, no emails will be sent to this prospect.

4.10 Make Cadence Active/Inactive

You can make a Cadence active or inactive whenever required. By default, once a Cadence is created it will become active.

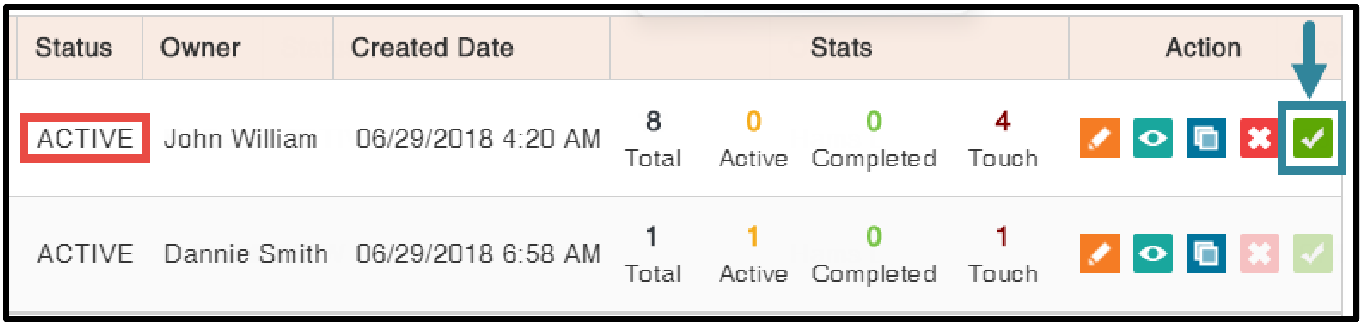
IMPORTANT NOTE

If a Cadence is marked as inactive, then all the prospects currently assigned to it will be automatically removed from the Cadence. When the same cadence is made active again, you need to assign new prospects.

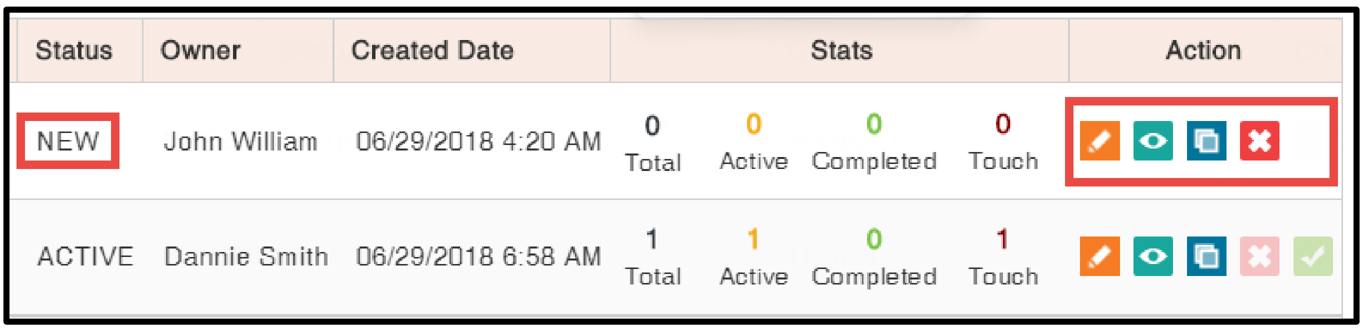
Make Cadence Inactive:

Find the steps below to make a Cadence inactive:

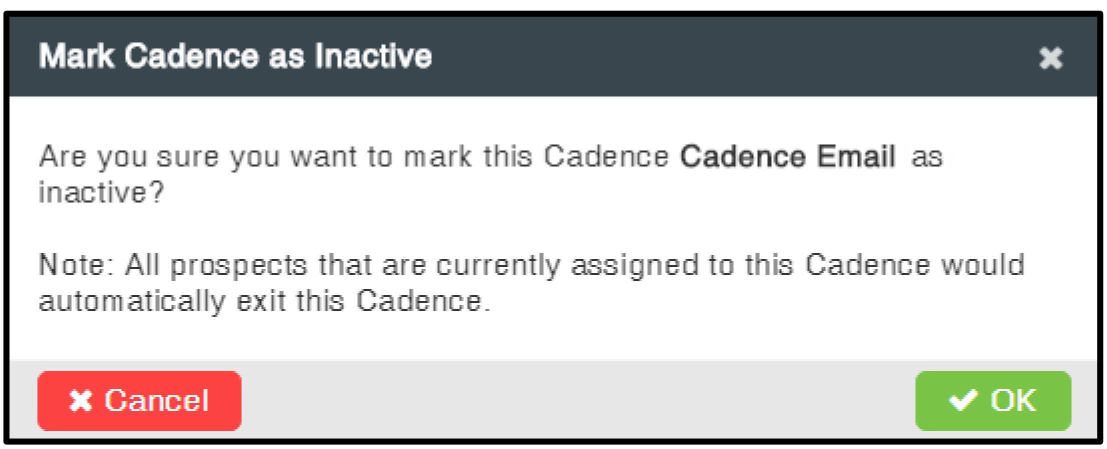
1. In the **Cadences** tab, click on the **Make Cadence Inactive** icon to the right of the Cadence you want to make inactive.



NOTE: The **Make Cadence Inactive** icon will __not__ be available for Cadences in '**New**' status, as shown below:



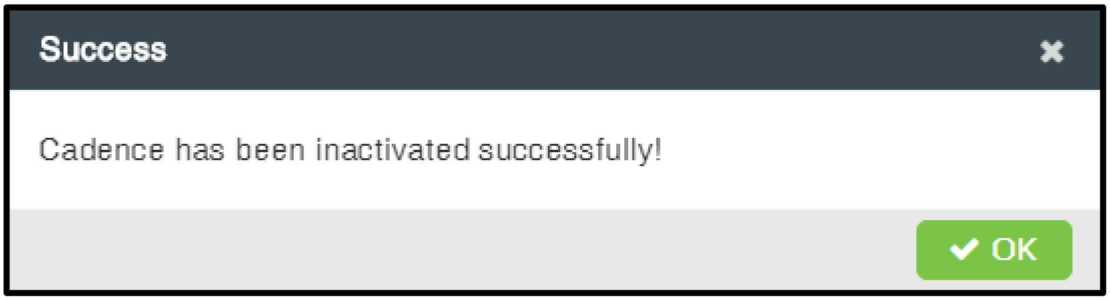
2. In the **Mark Cadence as Inactive** window, click **OK** to make the selected Cadence inactive.



Click **OK** to make the cadence inactive. All prospects that are currently assigned to this Cadence will be automatically removed from this Cadence.

Or, click **Cancel** to cancel the process.

The following message will be displayed after successful inactivation of the Cadence.

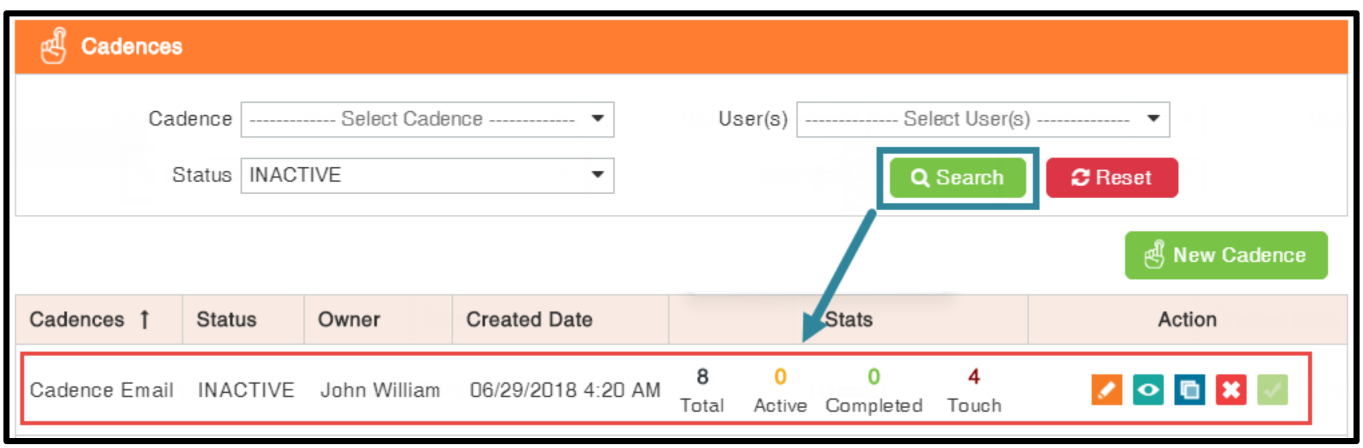


Make Cadence Active:

Find the steps below to make a Cadence active from inactive state:

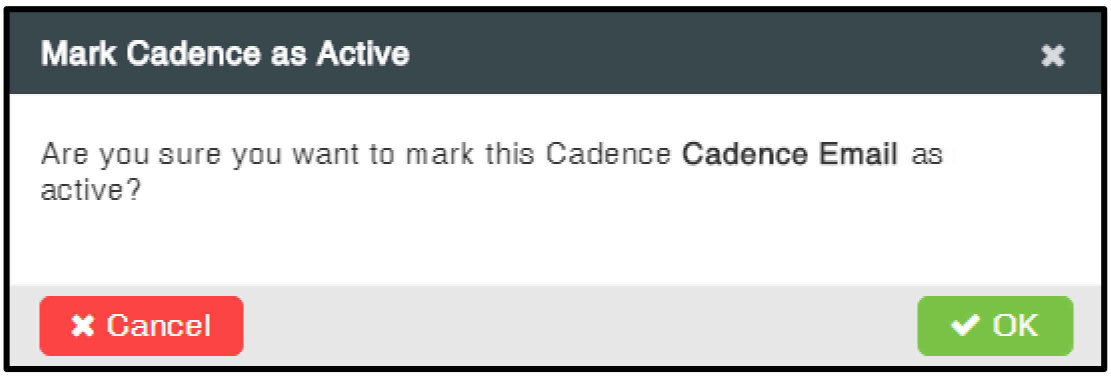
1. In the **Cadences** tab, select the status '**Inactive**' from the **Status** dropdown.

2. Then click **Search** to filter all the inactive cadences.



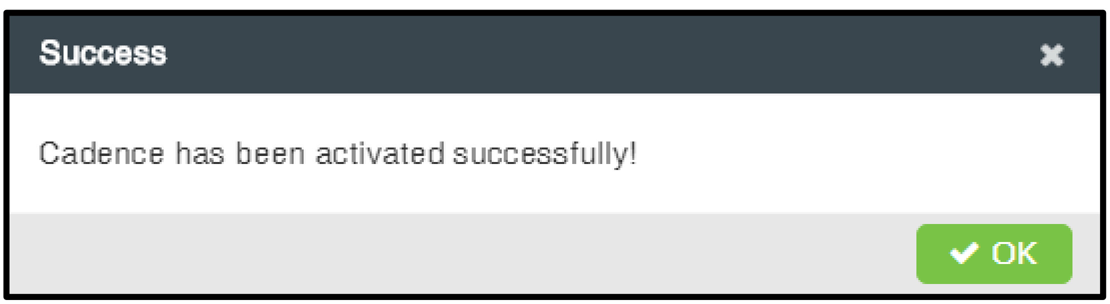
3. Click on the **Make Cadence Active** icon to the right of the Cadence you wish to make active again.

4. The **Mark Cadence as Active** window will pop up.



Click **OK** to make the selected Cadence active or click **Cancel** to cancel the process.

5. Once the Cadence has been successfully activated, a success message will be displayed as shown below. Click **OK**.

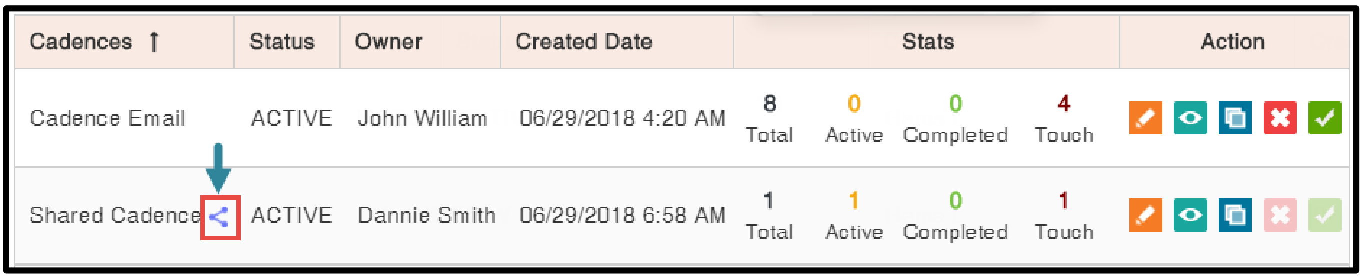


4.11 Shared Cadence

Users cannot share a cadence with another user, but users can use Cadences shared by a manager/admin.

Shared Cadences will have a **shared** icon next to the cadence name, as shown below:

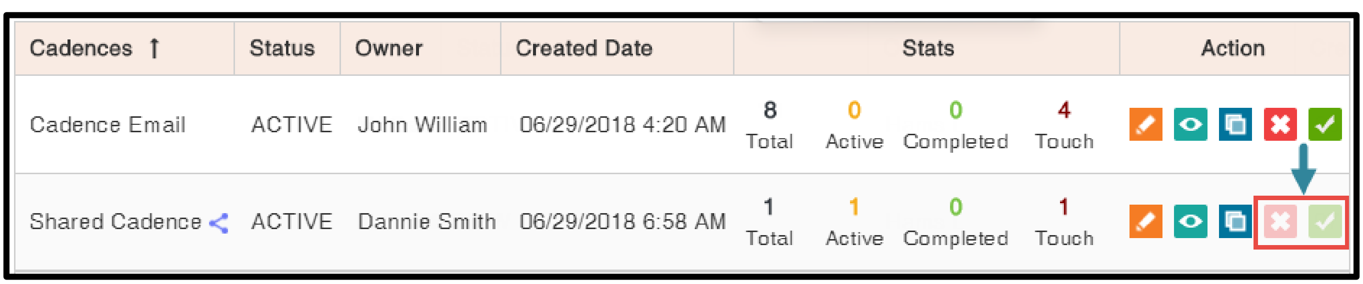
Navigation	TruCadence ► Cadences tab



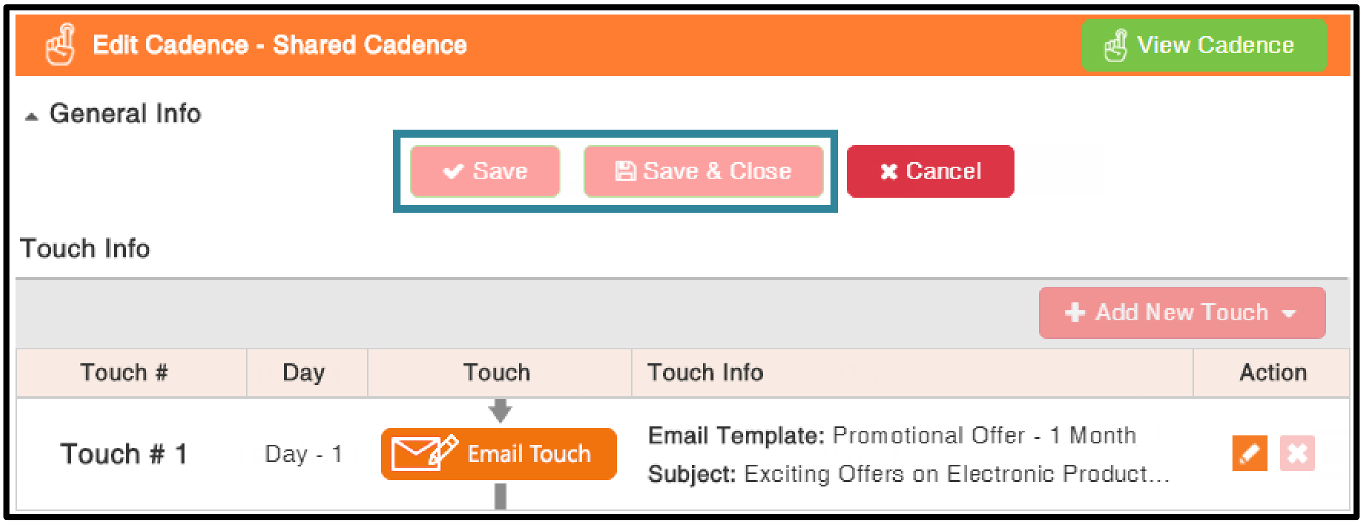
You can only upload prospects to a shared cadence and make use of the defined touches or you can remove prospects from a shared cadence. You cannot edit or delete the touches assigned within the shared cadences.

NOTE: Refer to Chapter 5 - Prospects Tab for detailed instructions on how to upload prospects for a cadence.

You will not be able to delete or inactivate a shared cadence, as the **Delete** icon and **Make Cadence Inactive** icon will be disabled.



The Edit icon will be made available to open and view the Touches added to a Cadence but if you try to edit the cadence & touch details, the **Save and Save & Close** button will be disabled, restricting you to save the modifications.

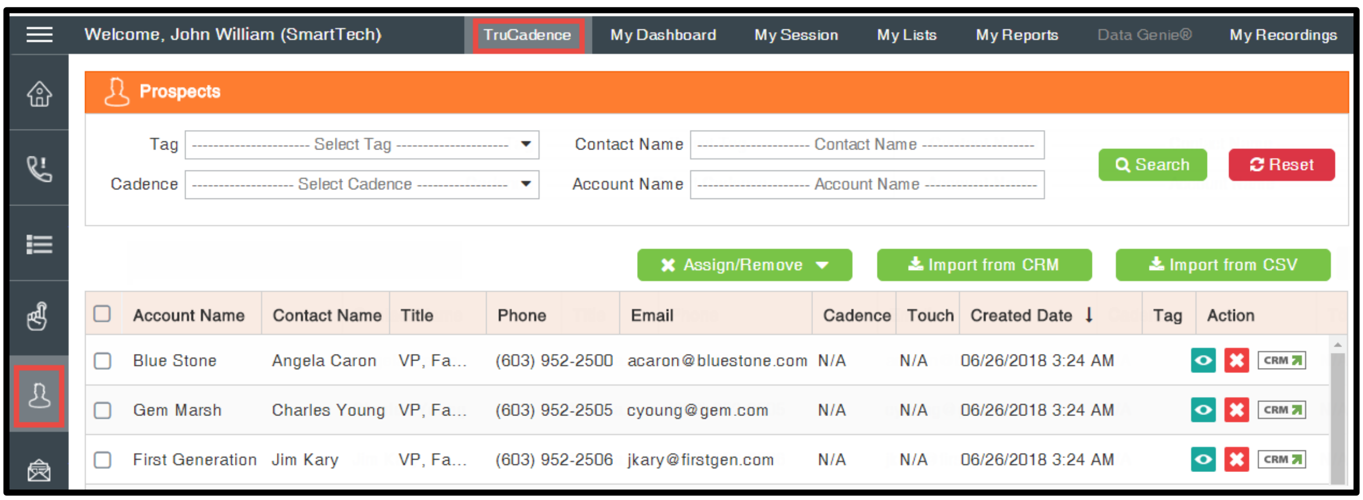


Chapter 5 – Prospects Tab

This chapter covers the following topics:

In the **Prospects** tab, you can import prospects from a CRM or from a CSV file, assign prospects to a cadence, remove prospects from a cadence, move prospects from one cadence to another, view each prospect's activity and delete prospects from TruCadence.

Navigation	TruCadence ► Prospects tab

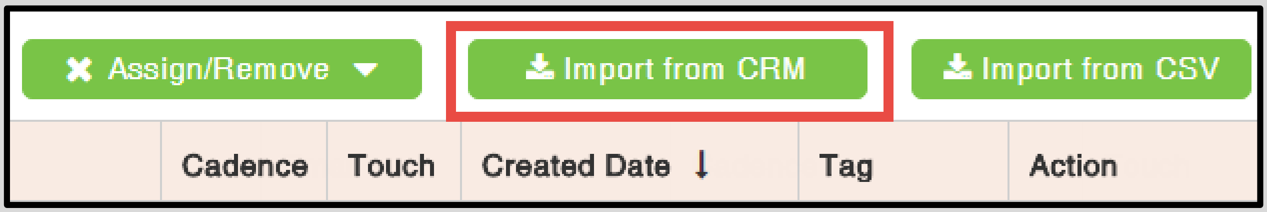


5.1 Import Prospects

The TruCadence module allows users to upload lists three different ways, **Import from CRM, Import from CSV** and **Import from Customer Portal**.

IMPORTANT NOTE

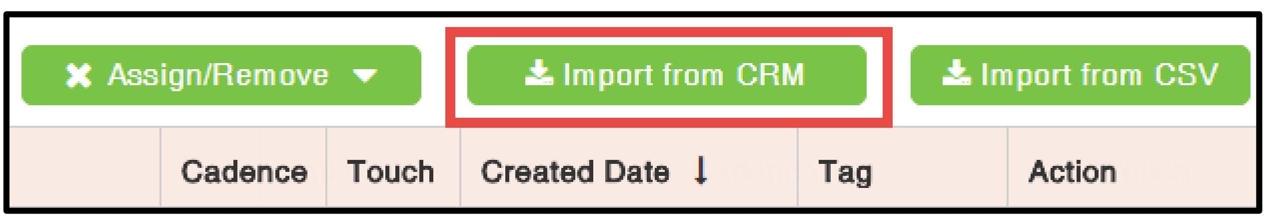
Depending on the type of license (CRM or Non-CRM), the user interface (UI) of the **Prospects** tab will differ; i.e. the **Import from CRM** button will not be available for **Non-CRM** users.



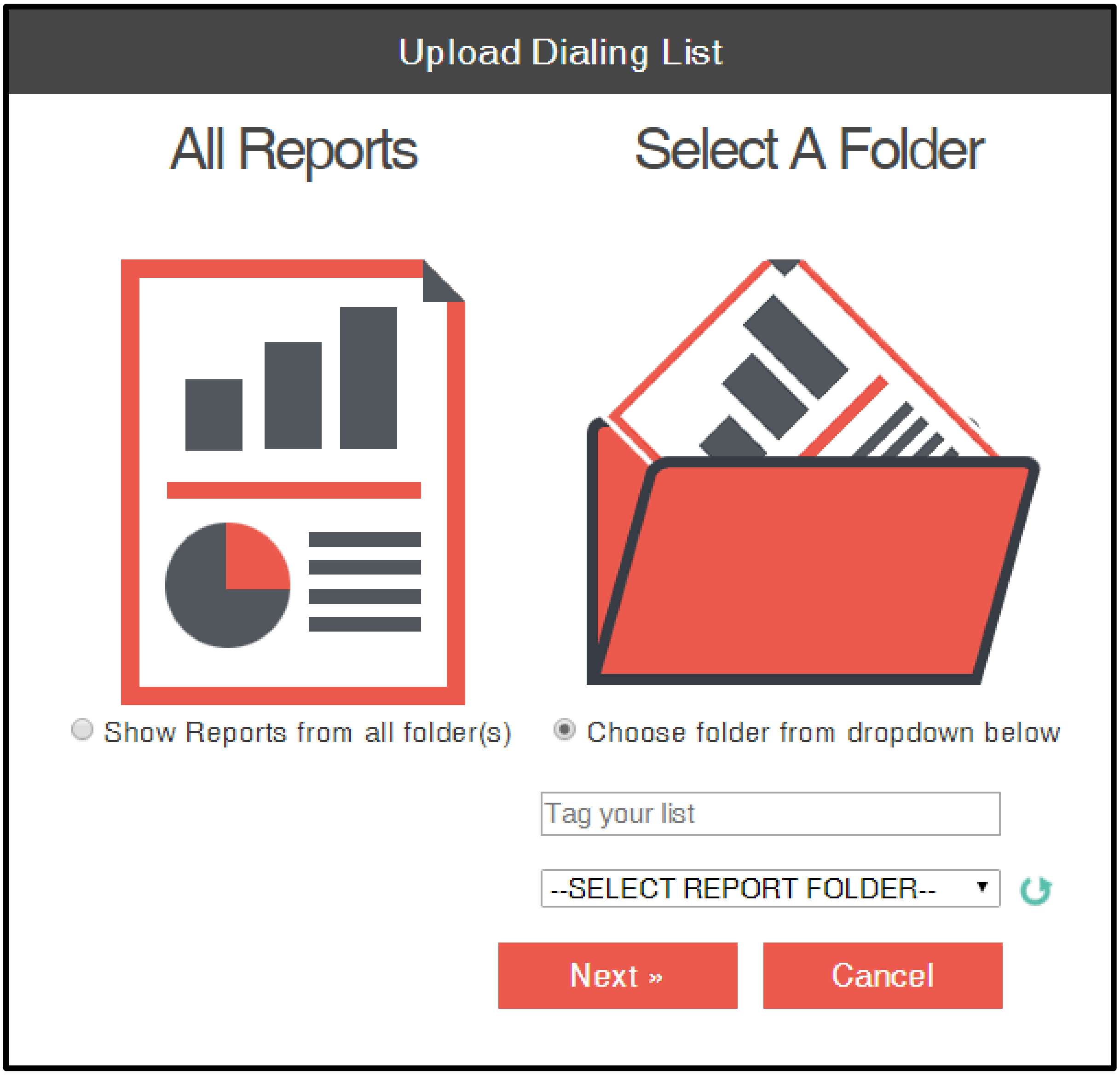
5.1.1 Import from CRM (only for CRM users)

If you are a CRM user and you have logged into ConnectLeader with your CRM Credentials (as mentioned in **Chapter 1 – Log In / Log Off**), find the steps below to upload a prospects report from your CRM.

1. In the **TruCadence** ► **Prospects** tab, click on the **Import from CRM** button.

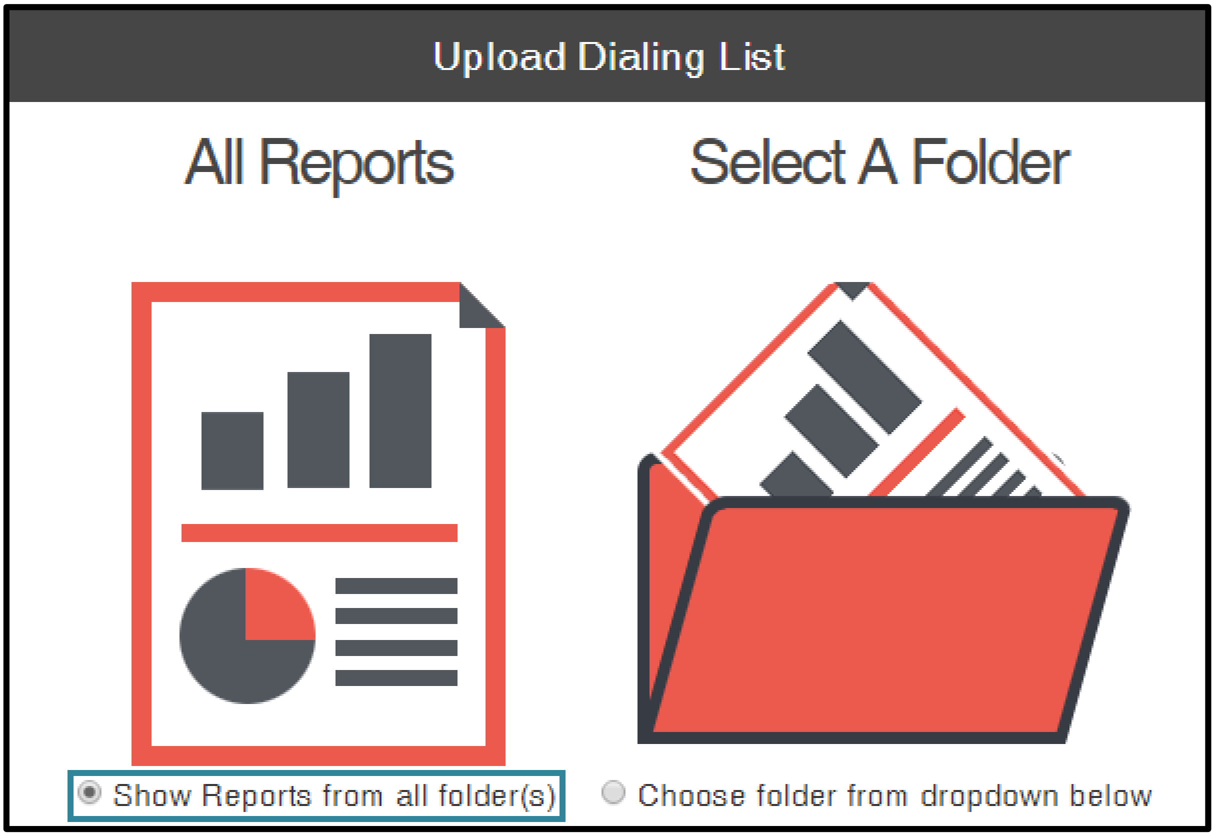


2. The **Upload Dialing List** popup window will be displayed.

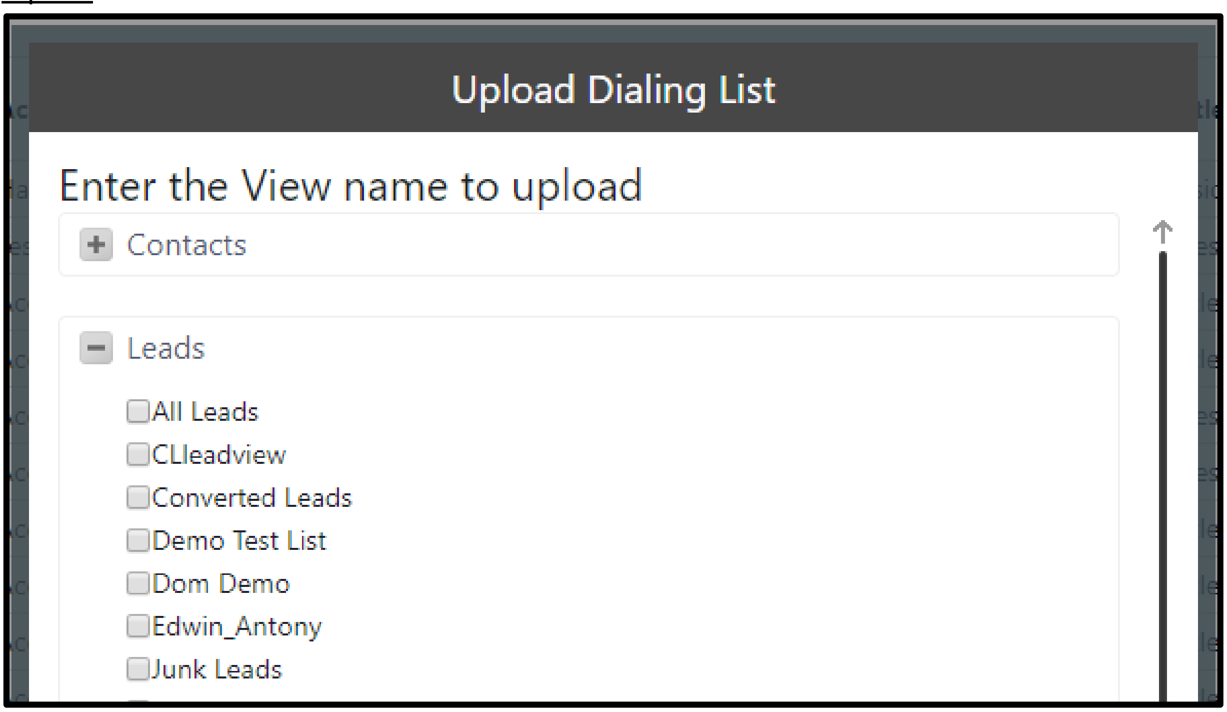


3. Choose one of the following options to import prospects from a CRM:

    a. Select the option '**Show Reports from all folder(s)**' to view prospect reports from all folders.

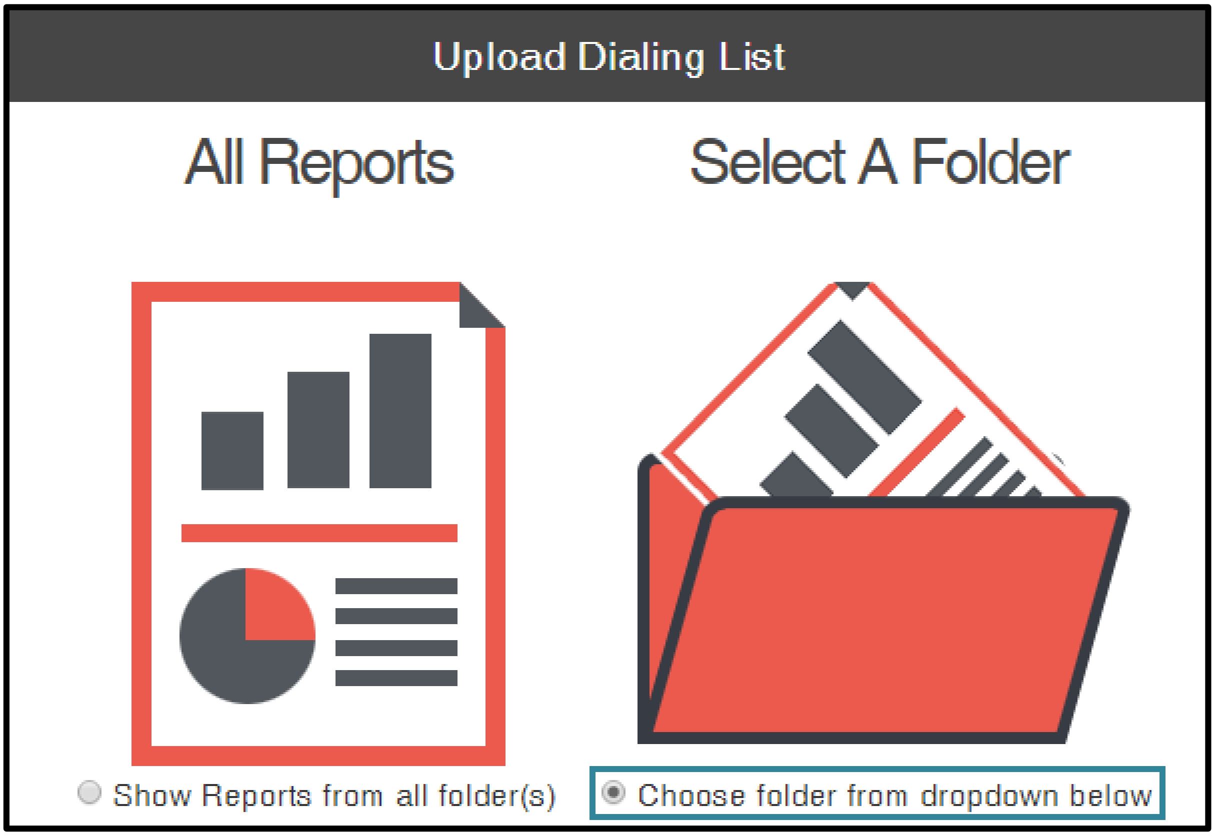


Click **Next** to select a prospects report(s) from any folder. You can select a maximum of 4 reports at once.



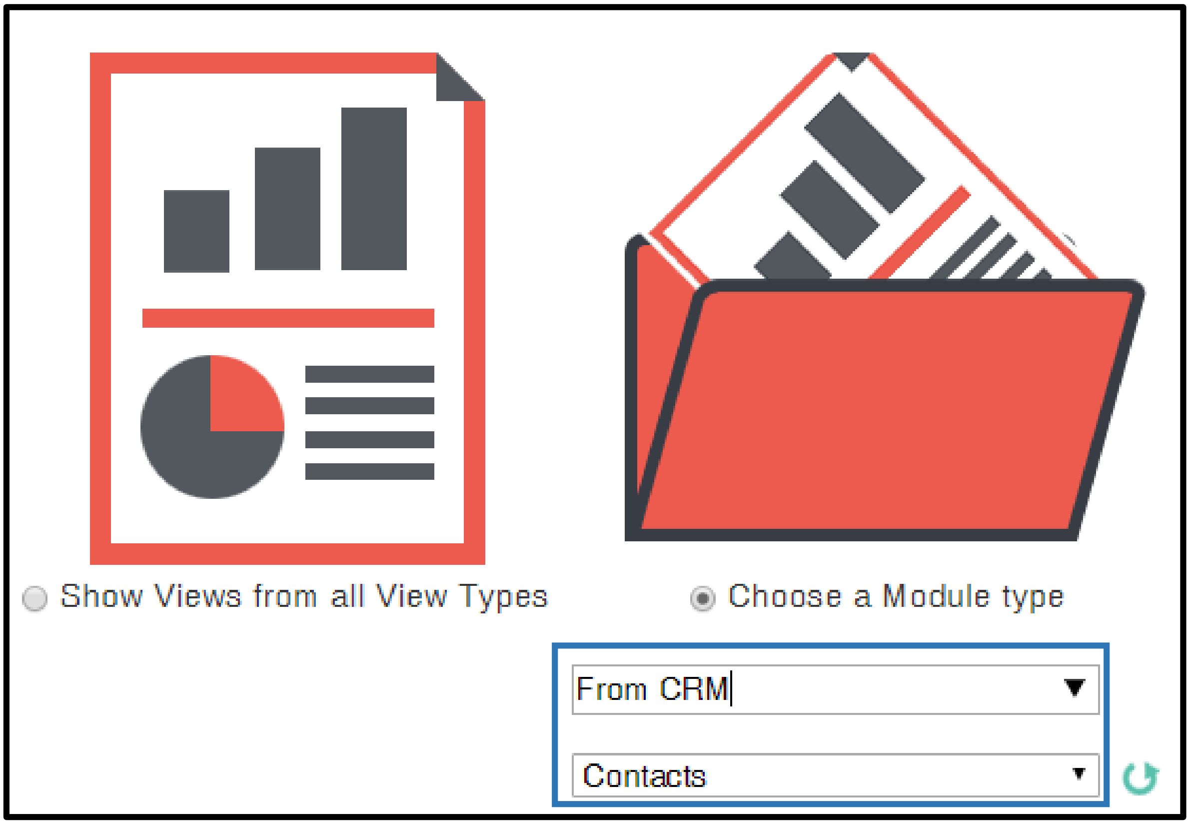
OR

a. Select the option '**Choose folder from dropdown below**' to choose a prospect report from a folder.



When selecting this option, a dropdown will be enabled to choose a report folder.

- **Tag your list** – Enter a tag name to easily identify these prospects later on. Non-mandatory field
- **Select Report Folder** – Select a folder from the dropdown where your prospect report is saved

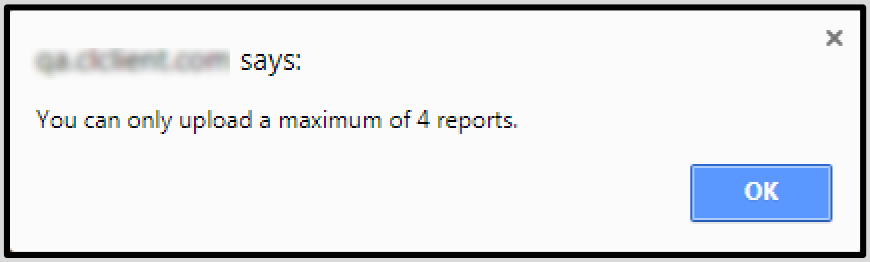


The **Refresh** icon next to the dropdown allows you to refresh your report folders.

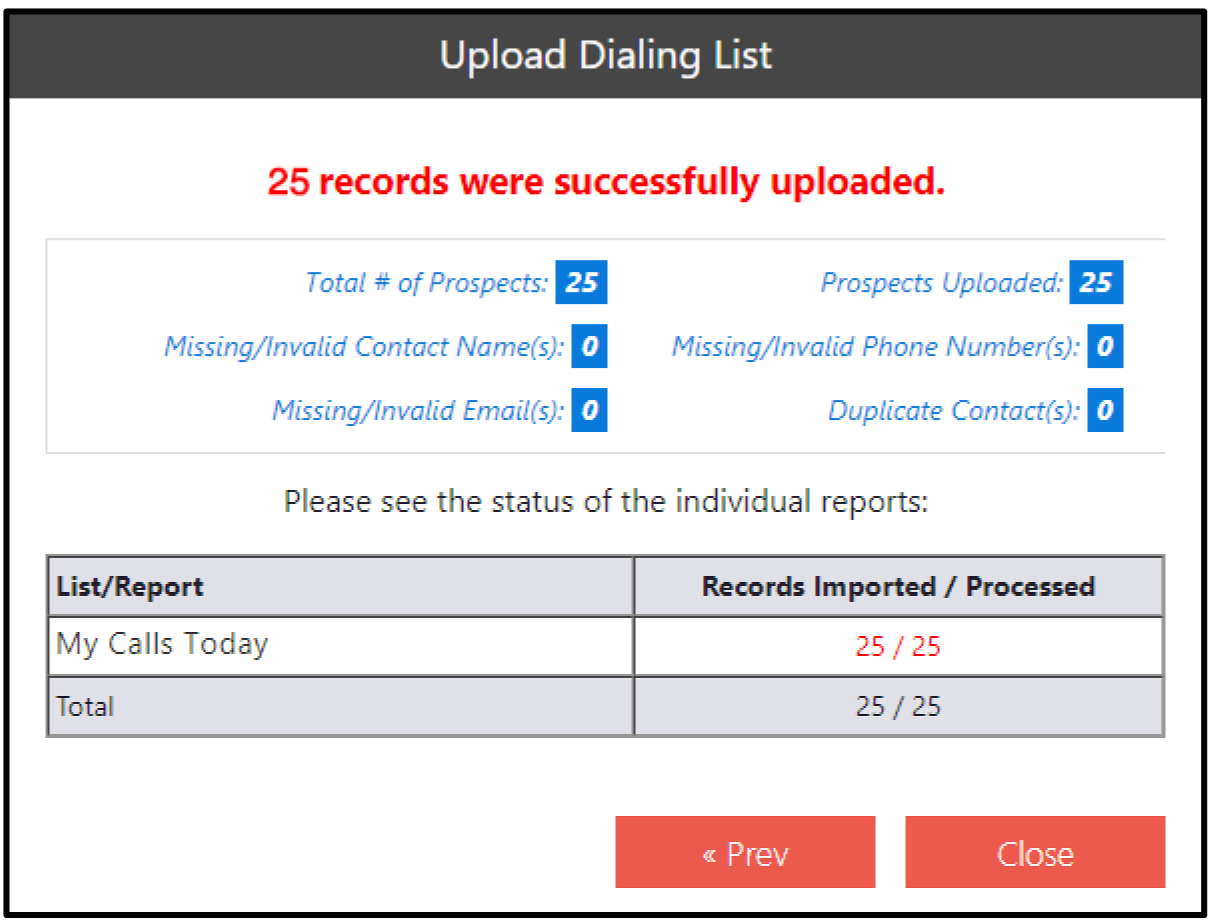
Click **Next** to select a prospects report(s) from the selected folder. You can select a maximum of 4 reports at once.

IMPORTANT NOTE

When you trying to import more than 4 reports at once, the following error message will be displayed, when the **Next** button is clicked:



4. After selecting the required prospects report(s) from the folders, click **Next** to upload the report(s).
5. The reports will be uploaded, and the upload status will be displayed in the **Upload Dialing List** popup window for each file.



In the **Upload Dialing List** popup window, you will see the following:

a. How many records were successfully uploaded.

b. **Total # of Prospects –** Number of prospects in the list

c. **Prospects Uploaded** – Number of prospects uploaded successfully

d. **Missing/Invalid Contact Name(s) –** Number of prospects failed to upload due to the missing of **Contact Name** field in the CRM (if any)

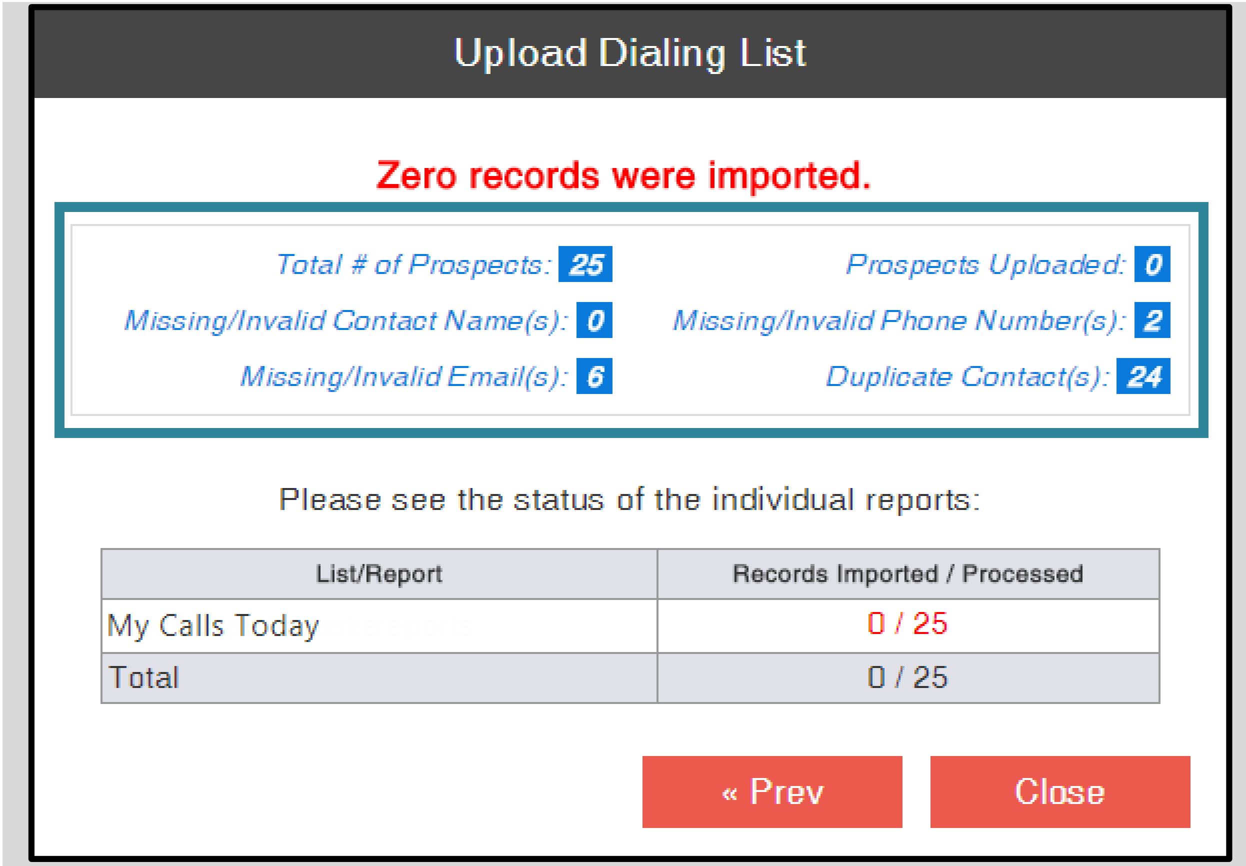
e. **Missing/Invalid Phone Number(s) –** Number of prospects failed to upload due to the missing of **Phone Number** field in the CRM (if any)

f. M**issing/Invalid Email(s) –** Number of prospects failed to upload due to the missing of **Email ID** field in the CRM (if any)

g. **Duplicate Contacts –** Number of prospects failed to upload due to duplication (if any)

IMPORTANT NOTE

During Import, if you have any duplicate records (or contacts) or records with invalid/missing contact names, invalid/missing phone numbers and invalid/missing Emails, then those records will not be imported into TruCadence. Also, you will be able to see what field is missing or duplication and the record count, as shown below:



6. Click **Close** to close the **Upload Dialing List** window. The uploaded prospects report(s) will be listed in the **Prospects** tab.

5.1.2 Import from CSV

Zoho users can use this feature to upload prospects list(s) from their computer (in .CSV format).

Pre-requisites

Please ensure the following pre-requisites are met before uploading a CSV file:

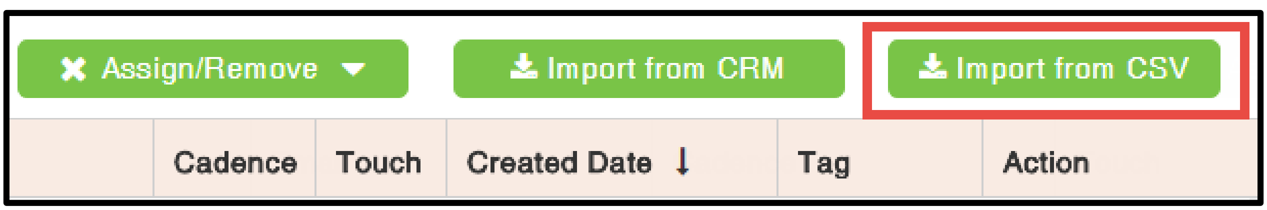
- The file size should not be greater than 3MB
- The first row of the CSV file should contain Column Headers
- No blank columns between other data
- No duplicate headers
- Mandatory Columns: Account Name (i.e. Company name), Contact Name and Phone Number
- If any record is missing a contact name or a phone number, that record will not be uploaded into TruCadence

If any of the above pre-requisites are not met then the CSV file cannot be uploaded and an error will pop up explaining what is missing.

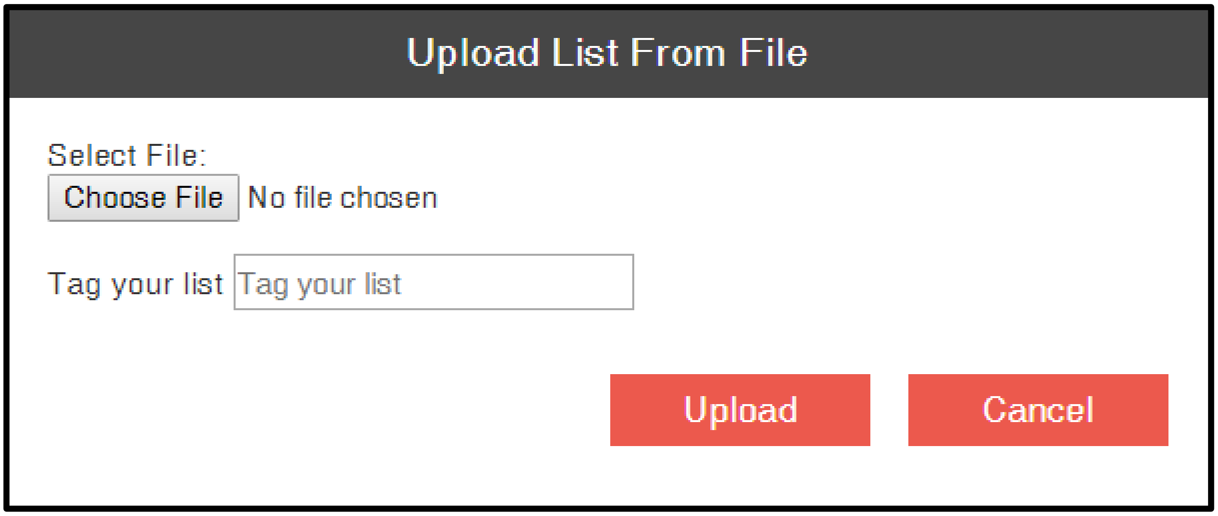
Find the steps below to import the prospects list(s) from a computer:

1. Under the **TruCadence ► Prospects** tab, click on the **Import from CSV** button.

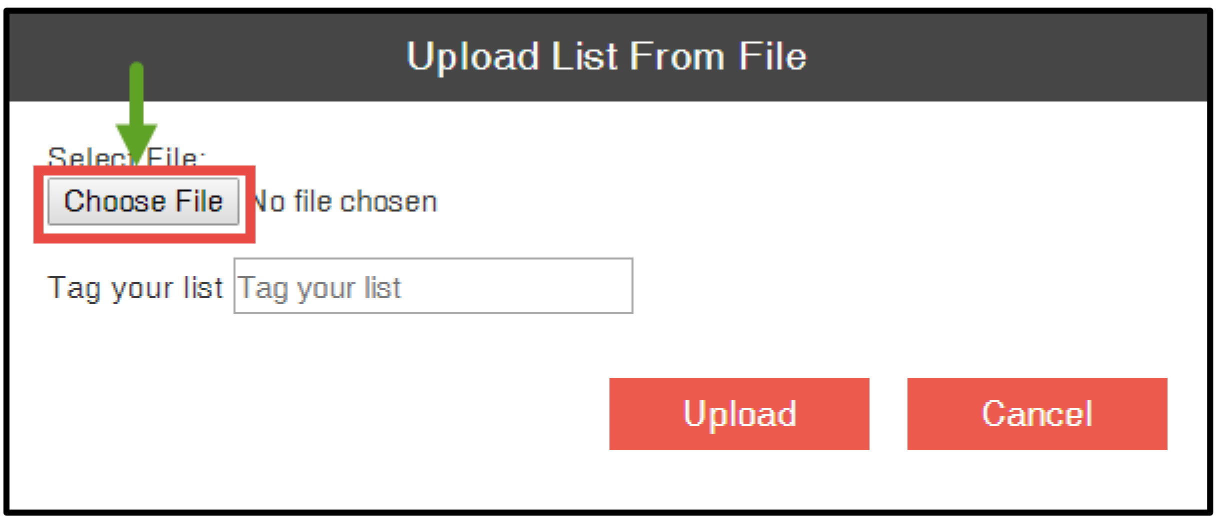
   CRM User



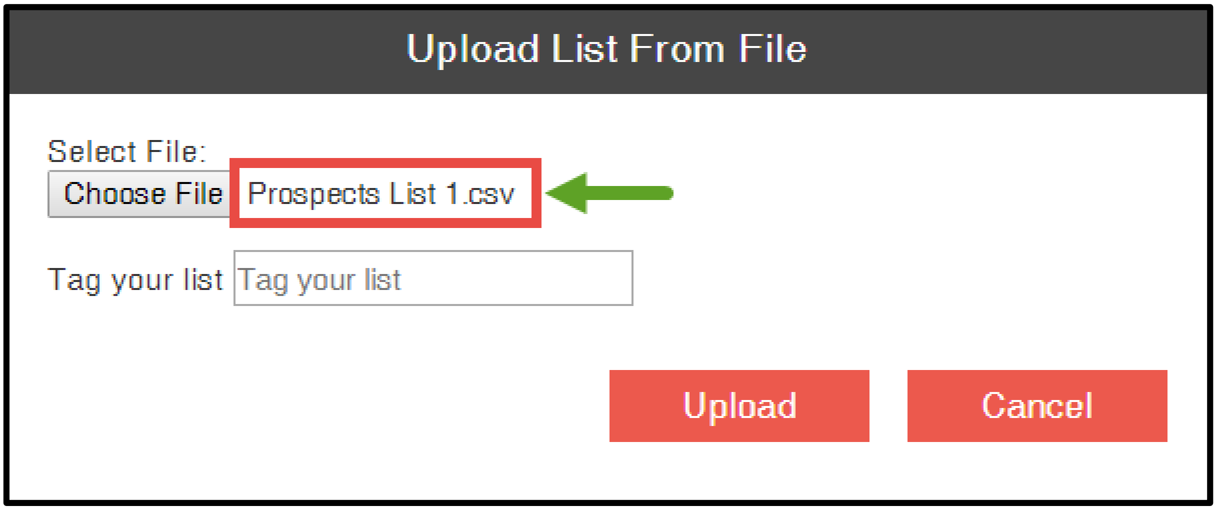
2. The **Upload List From File** popup window will be displayed.



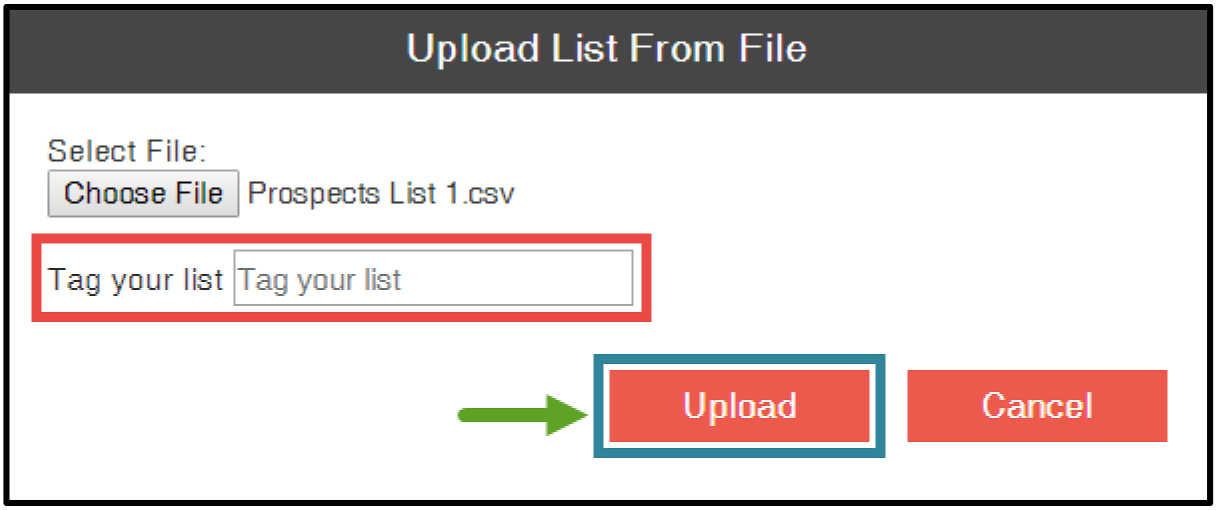
3. Click on the **Choose File** button and select the required CSV file from your computer.



4. The selected file name will be displayed next to the **Choose File** button.

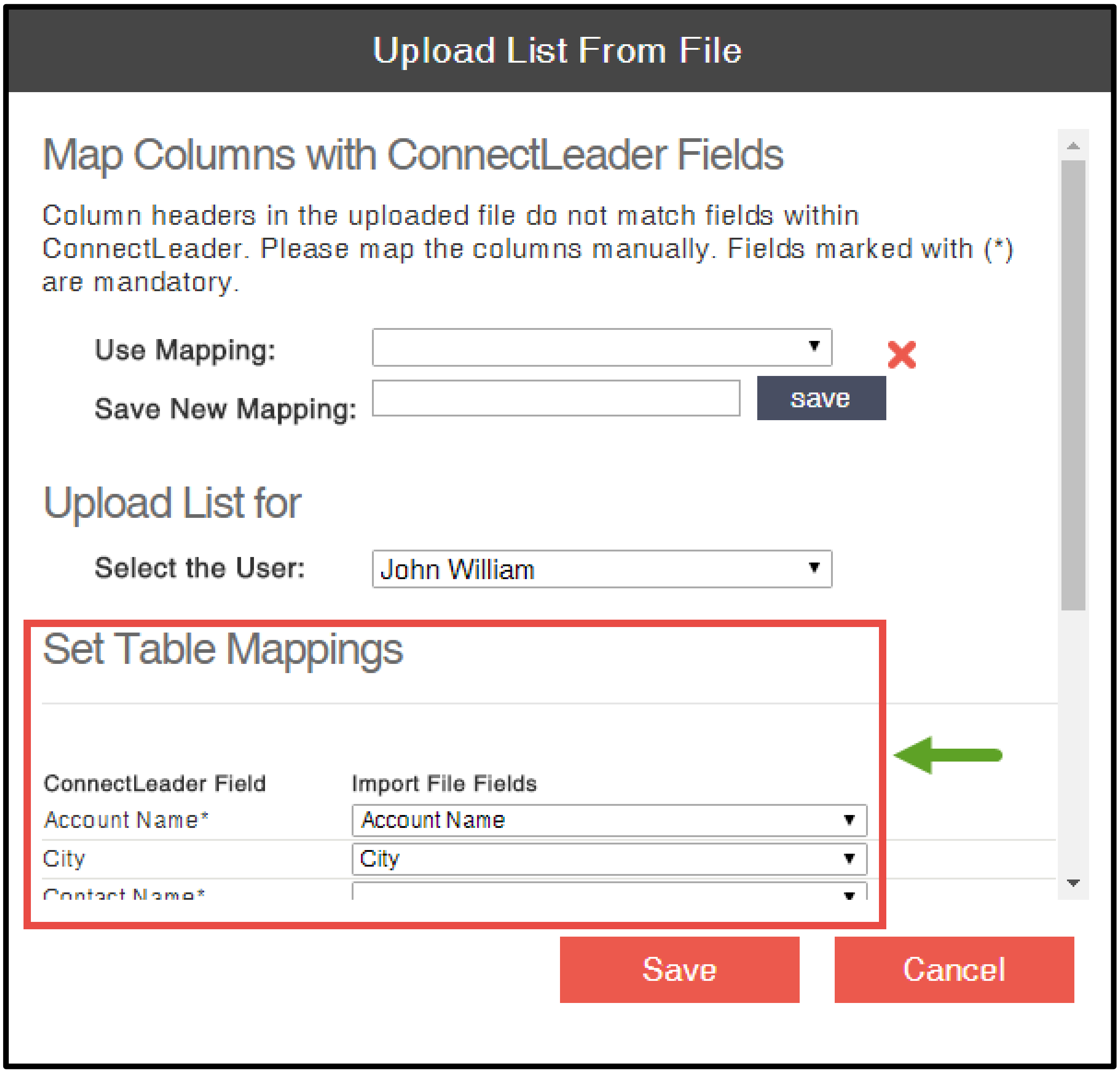


5. Enter a tag name in the **Tag** textbox for your reference and click **Upload** to set the table mapping.



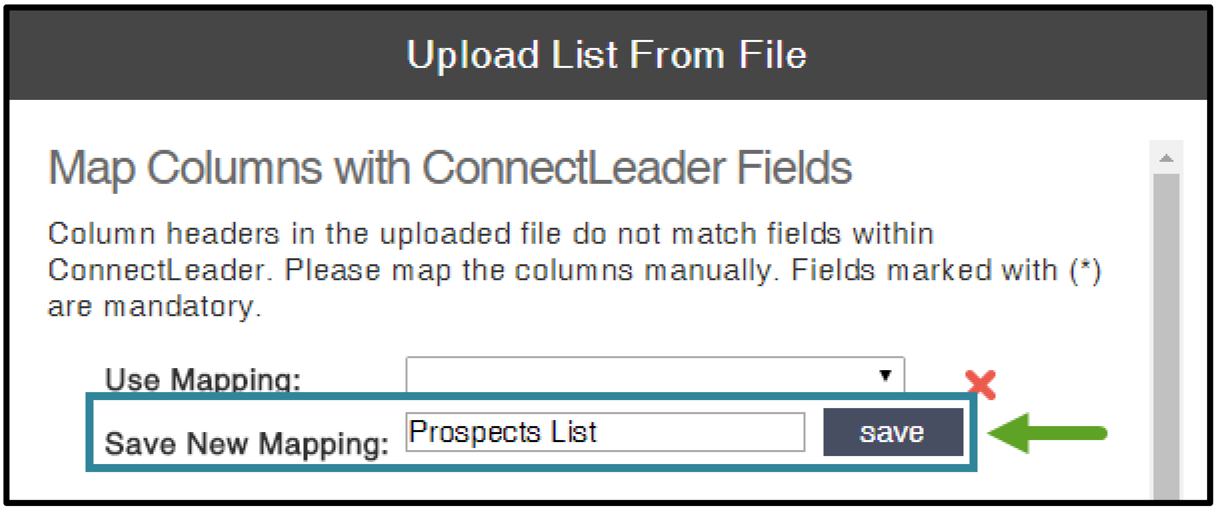
NOTE: Tag name is not a mandatory option, it is just for your reference to find prospects, which have been uploaded.

6. The **Set Table Mappings** section provides you a list of **ConnectLeader Field** names and **Import File Fields** in a dropdown to choose from. Map the appropriate columns in **Import File Fields** with the corresponding **ConnectLeader Fields**. If the column headers in the CSV file are the same as the **ConnectLeader Field** names, then the table mapping will be mapped automatically.

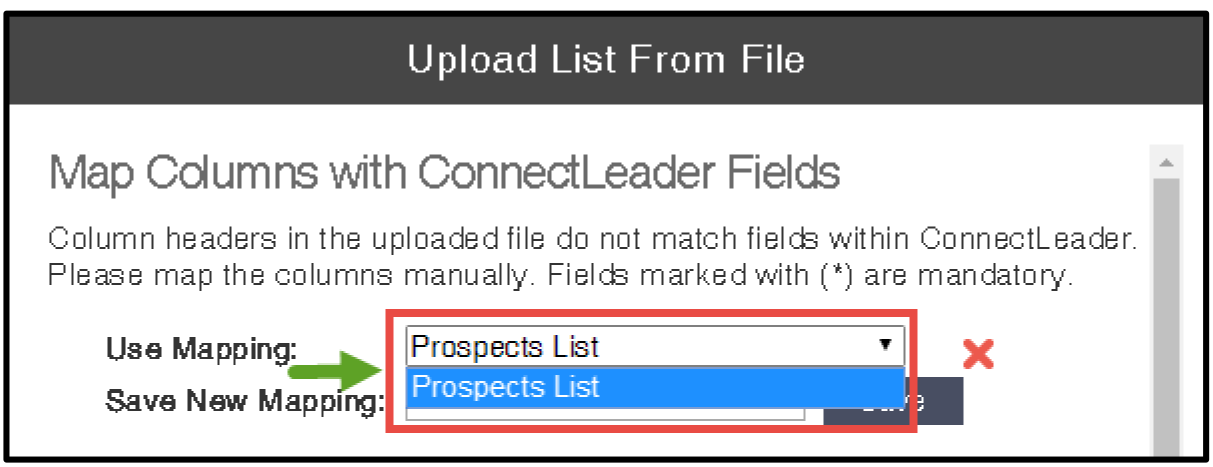


You can save the current mapping for future use, using the **Save New Mapping** option. Enter the name in the **Save New Mapping** field and click **Save** to save the current mapping.

NOTE: Your mapping needs to be completed prior to saving a New Mapping.



Existing mappings are available in the **Use Mapping** dropdown to map them instantly during future uploads. To remove an existing mapping, select the mapping and click the Delete icon next to it.

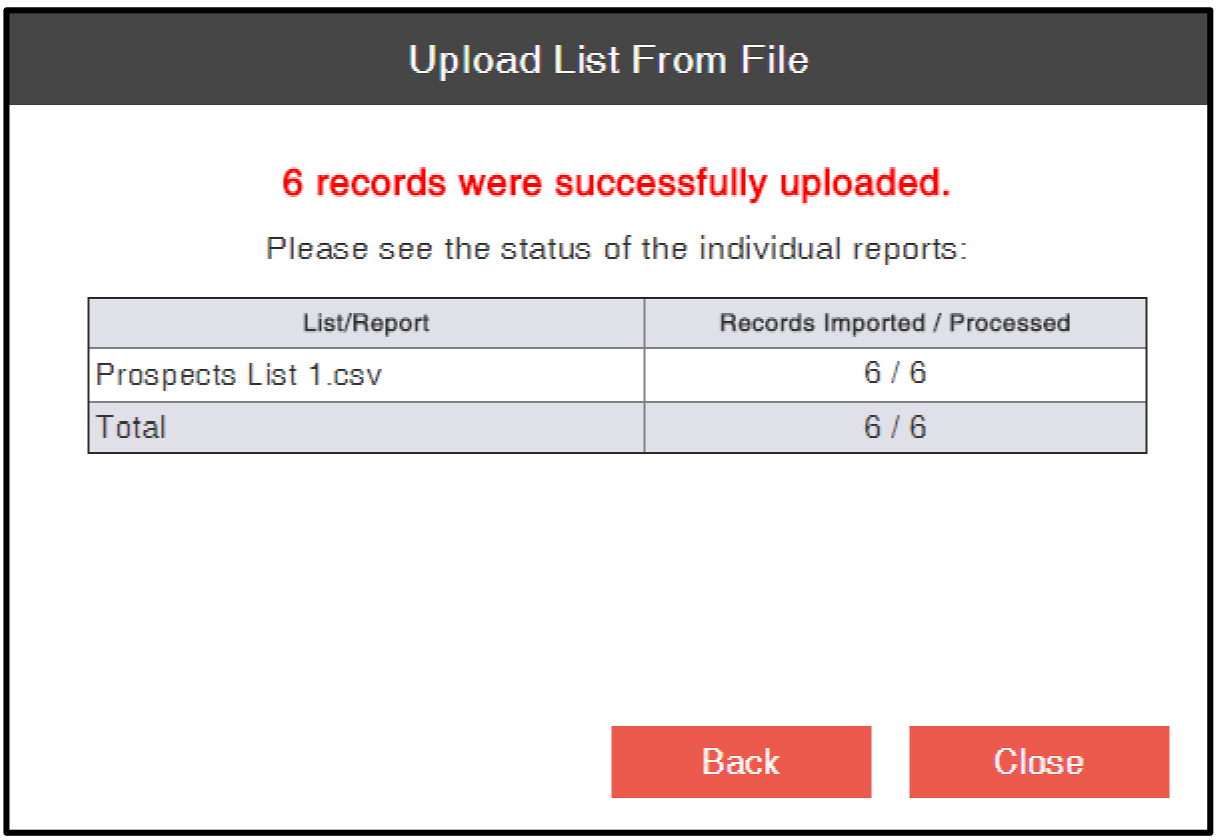


- **Upload List For** – Defaults to your name (logged in user). When clicking the **Save** button (as mentioned in **Step 7**), the selected list will be uploaded into your **Prospects** tab.

NOTE: Only managers can upload a prospect list for another user, non-managers will have their own name under the **Select the User** dropdown.

7. Click **Save** to upload the list.

8. The files will be uploaded and the upload status will be displayed in the **Upload List From File** popup window i.e. the number of records imported/available records.

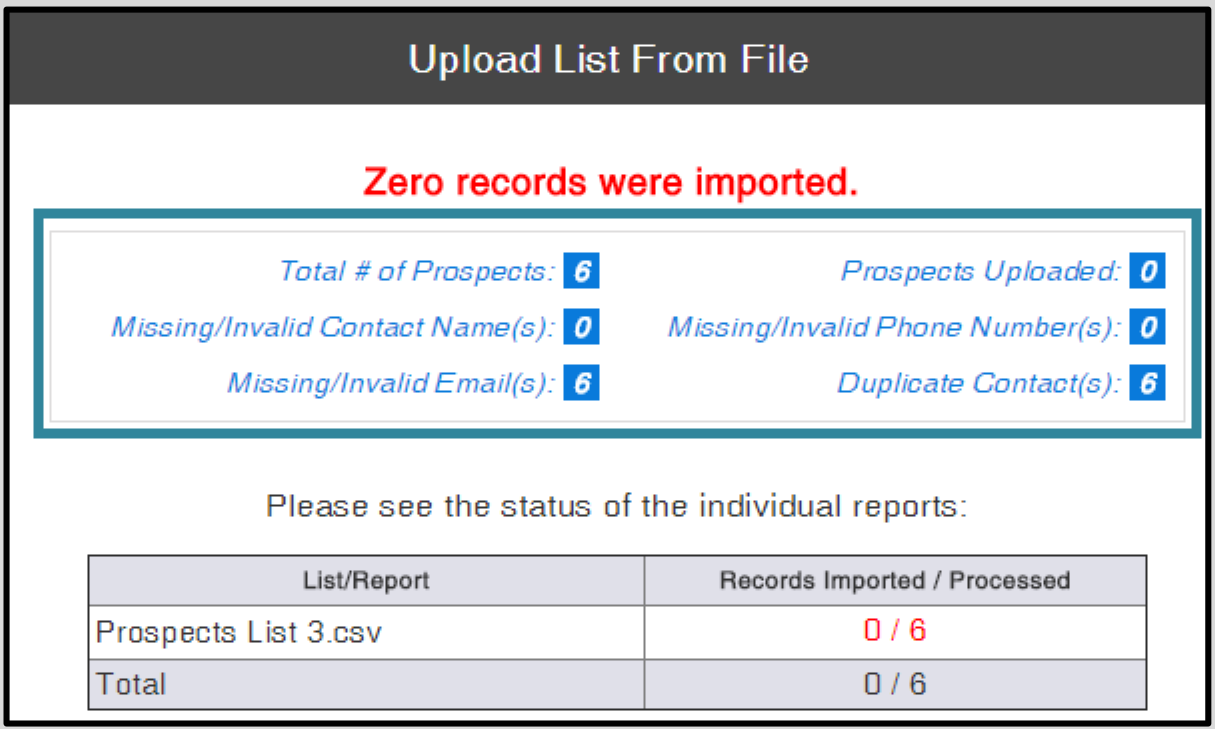


Click **Close** to close the window.

IMPORTANT NOTE

During Import, if you have any duplicate records (or contacts) or records with invalid/missing contact names, invalid/missing phone numbers and invalid/missing Emails, then those records will not be imported into TruCadence. Also, the **Upload List From File** window will display the following details:

- **Total # of Prospects –** Number of prospects in the list
- **Prospects Uploaded** – Number of prospects uploaded successfully
- **Missing/Invalid Contact Name(s)** – Number of prospects failed to upload due to the missing of **Contact Name** field
- **Missing/Invalid Phone Number(s) –** Number of prospects failed to upload due to the missing of **Phone Number** field
- M**issing/Invalid Email(s)** – Number of prospects failed to upload due to the missing of **Email ID** field
- **Duplicate Contacts** – Number of prospects failed to upload due to duplication

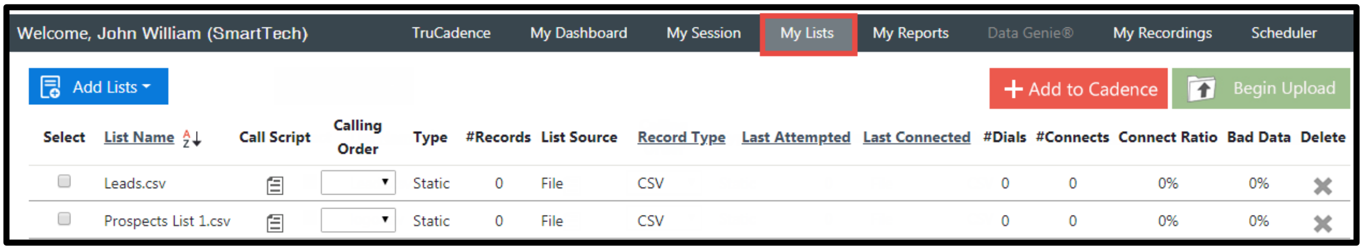


5.1.3 Import from Customer Portal

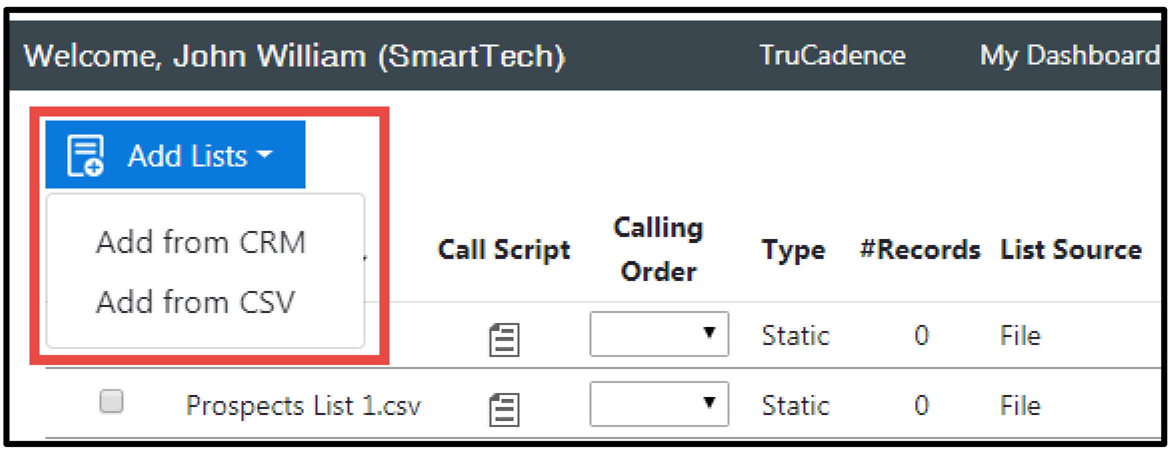
Another way to upload prospects to a cadence is via the **My Lists** tab in the Customer portal.

Find the steps below to import prospects into a cadence via customer portal:

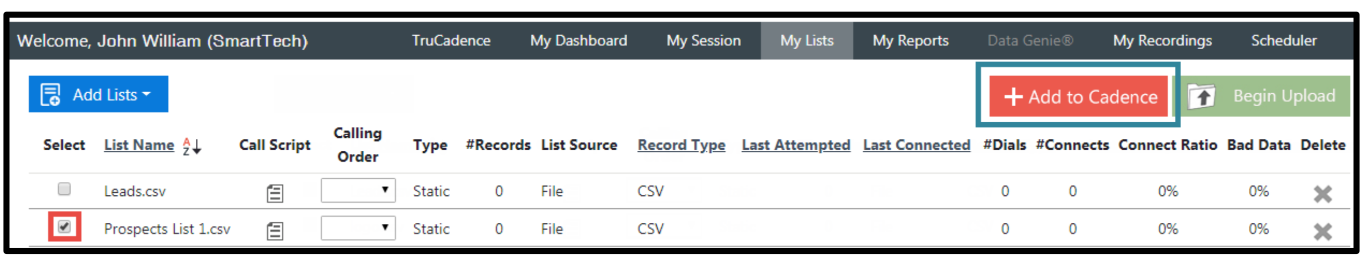
1. Log into the ConnectLeader portal and navigate to the **My Lists** tab.



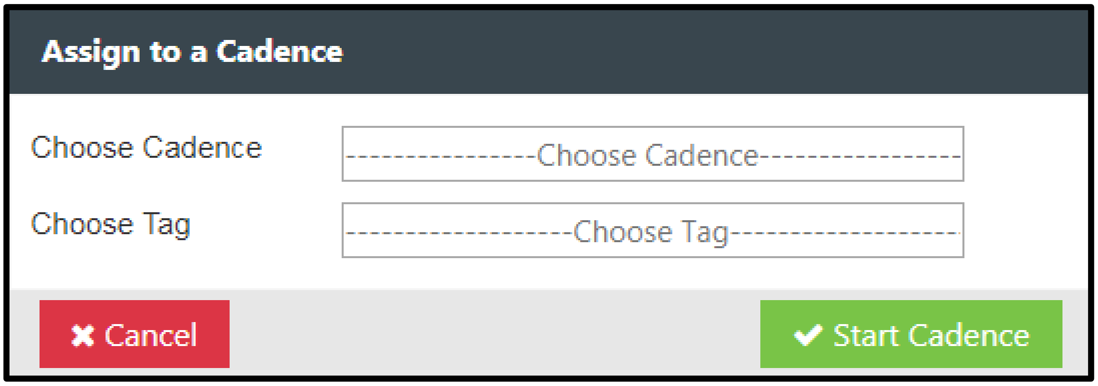
2. Click on the **Add Lists** button and choose either Add from CRM or Add from CSV.



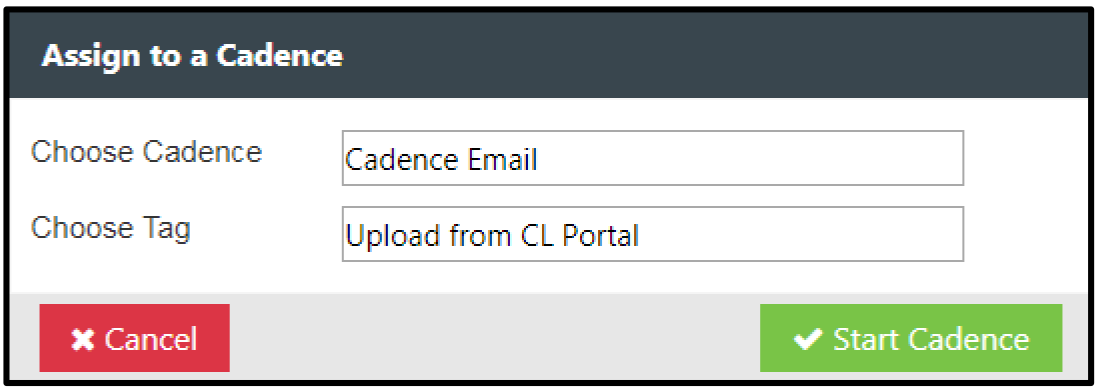
3. Once added to the my lists tab, select the desired list and click on the **Add to Cadence** button.



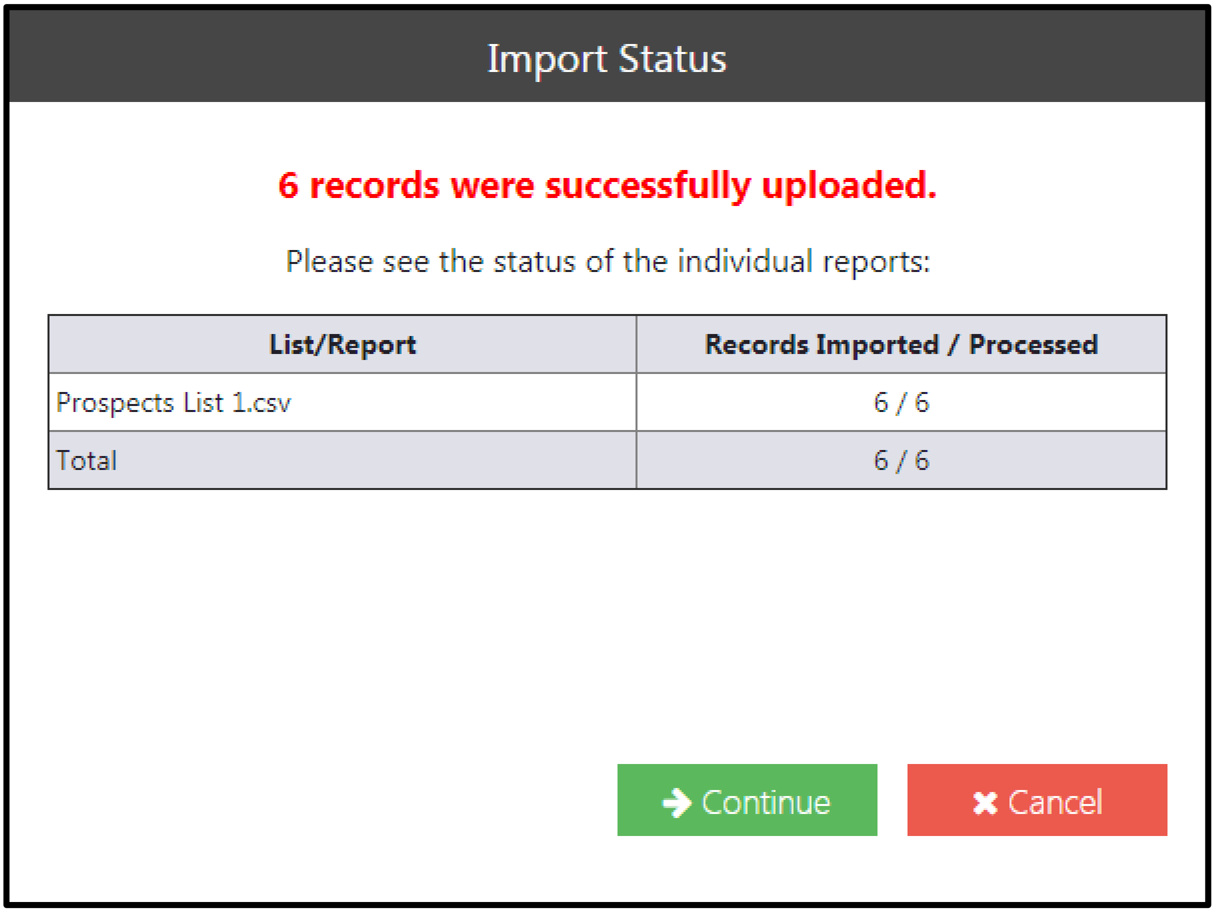
4. The **Assign to a Cadence** pop up window will be displayed.



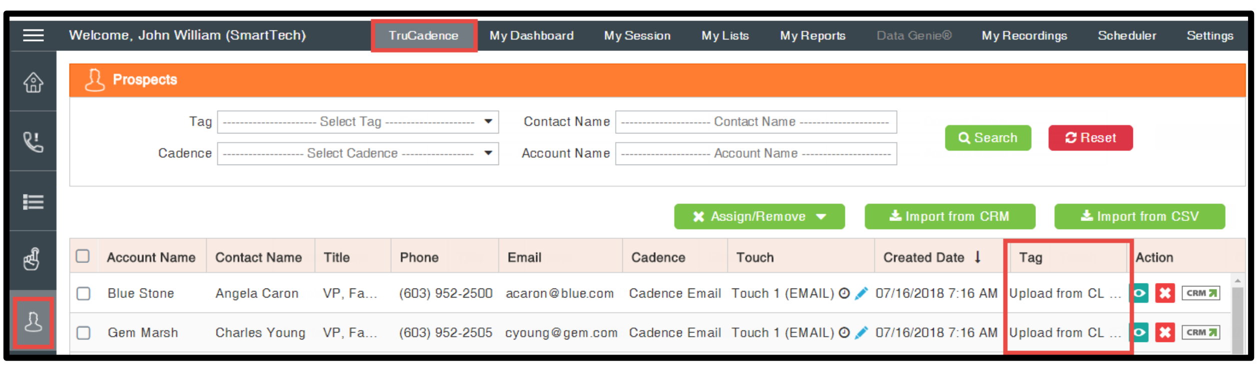
5. Select a **Cadence** from the dropdown to which you want the selected list to be assigned and tag a name for reference.



6. The **Import Status** window will be displayed with the record count that were successfully uploaded.



7. Click **Continue** to navigate to the **TruCadence ► Prospects** tab. The Prospects that are uploaded from the **My Lists** tab will be displayed along with the Cadence name that they were assigned to.

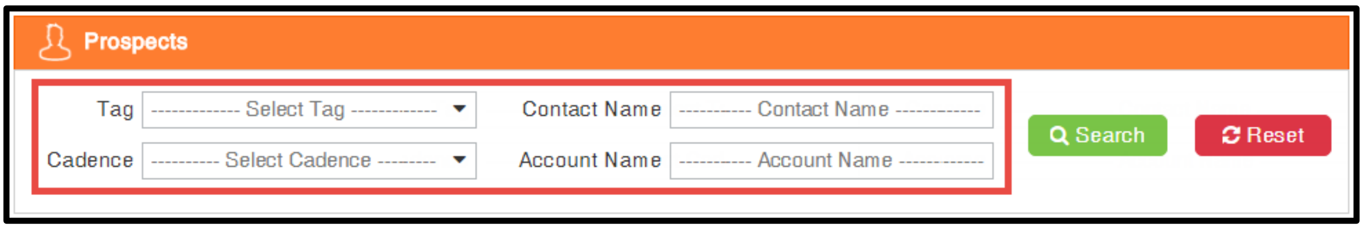


5.2 Assign Prospects to a Cadence

After importing a prospects list(s), you can either assign all the prospects to a Cadence or can select prospects and assign them to a Cadence.

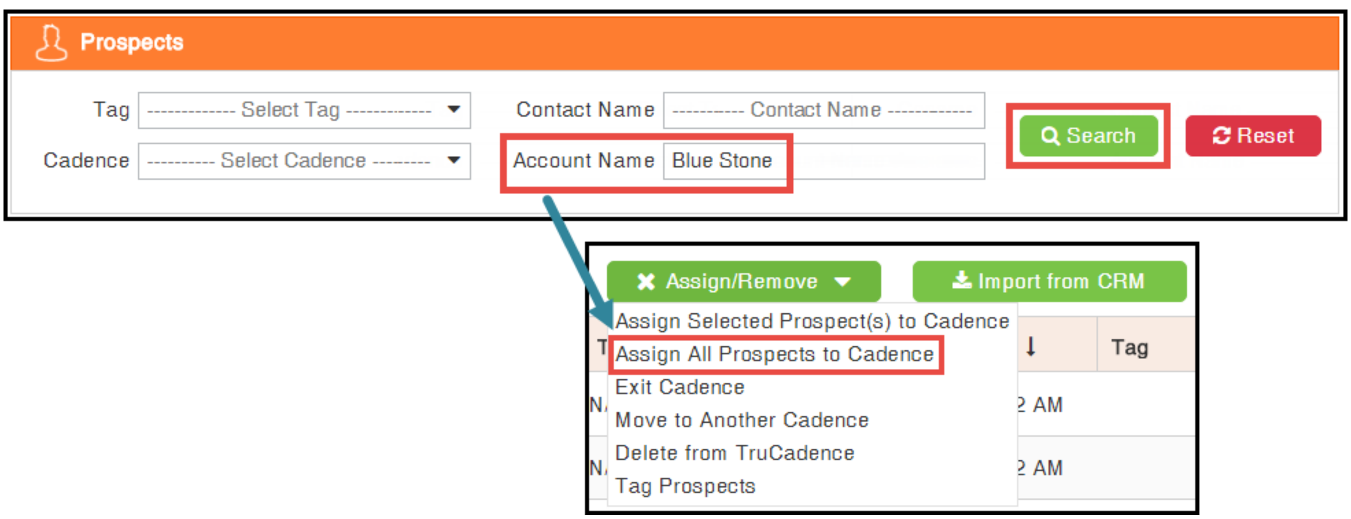
Assign all Prospects to a Cadence:

1. In the **Prospects** tab, search for the prospects using one of the following fields – Tag, Cadence, Contact Name or Account Name.



2. Select the prospects from the filtered list that you want to assign to a Cadence.

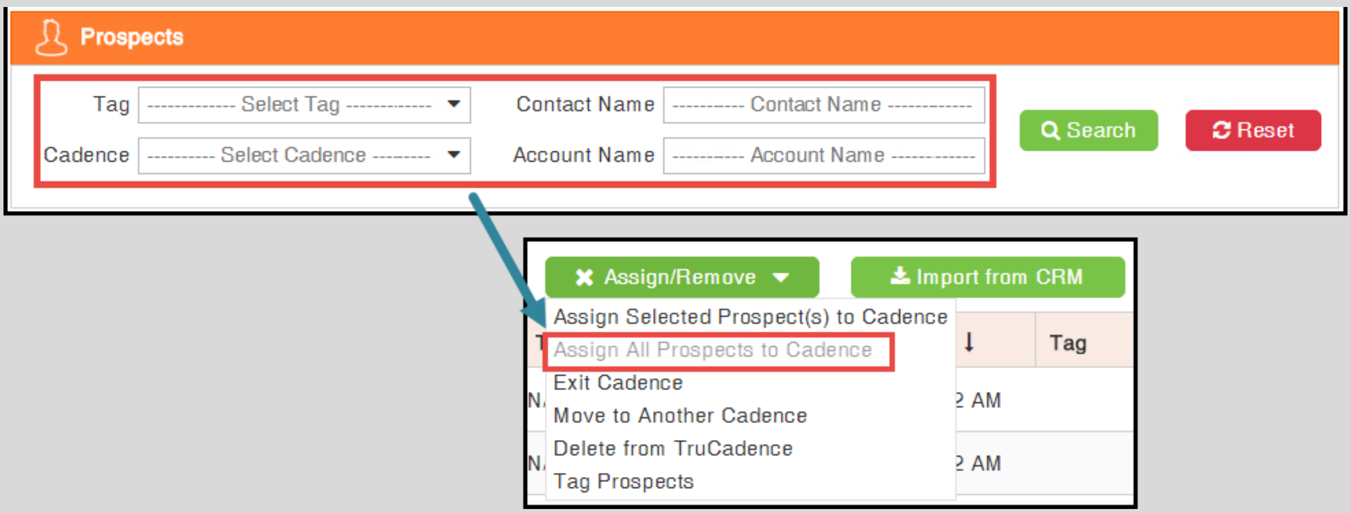
3. Then, click on the **Assign/Remove** dropdown and select **Assign All Prospects to Cadence**.



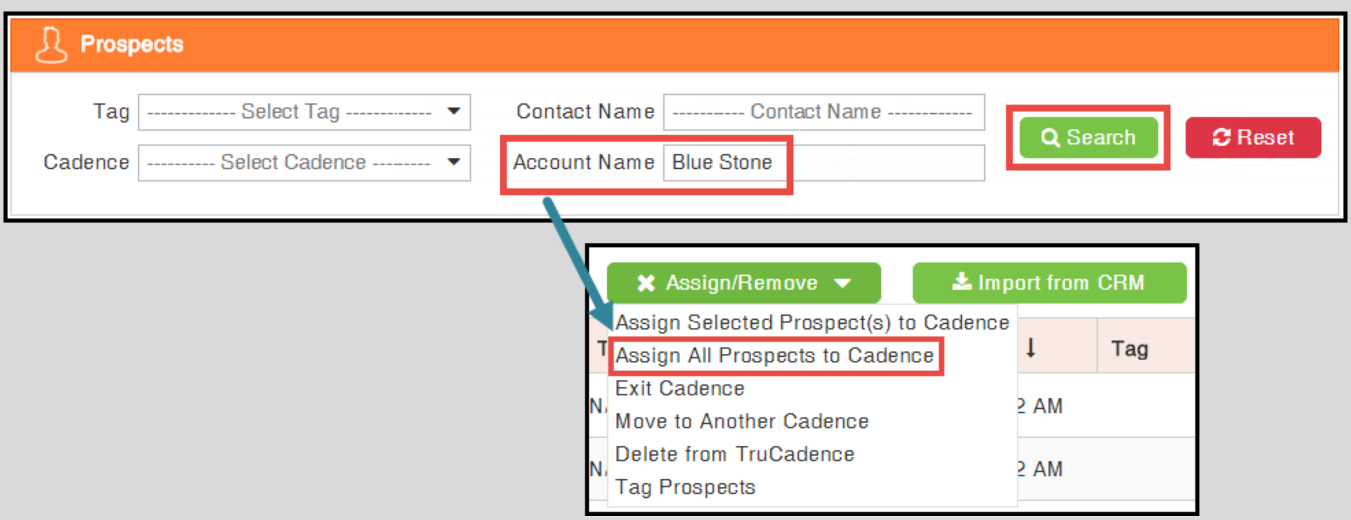
IMPORTANT NOTE

The **Assign All Prospects to Cadence** option will be enabled **only** if you select all prospects filtered. For instance, if you bring all contacts in Company **Blue Stone**, you can select them all and add them to the same cadence.

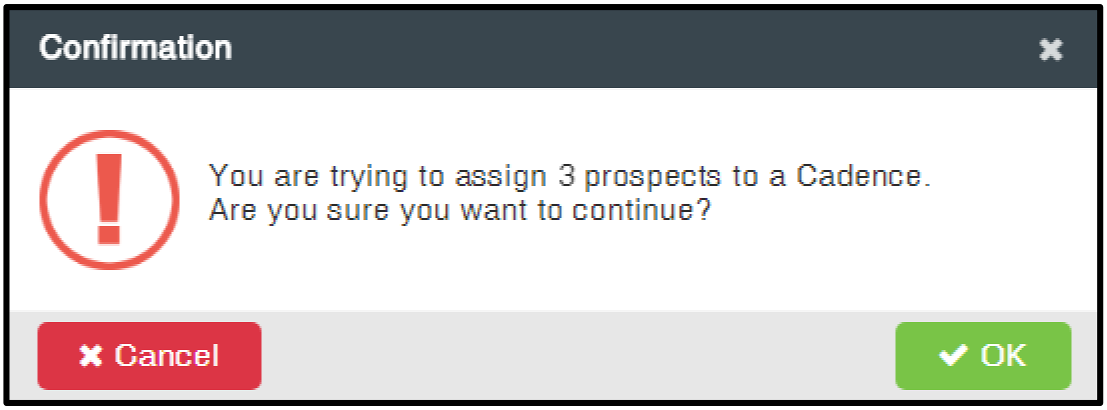
Before Filtering



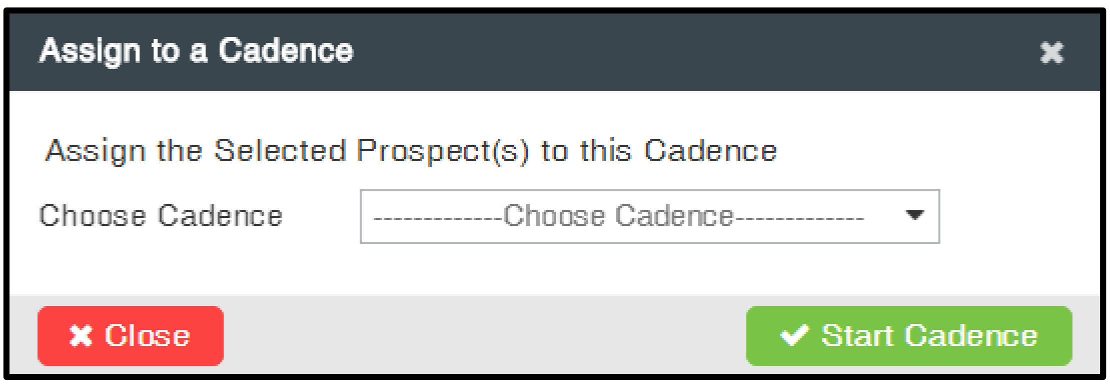
After Filtering



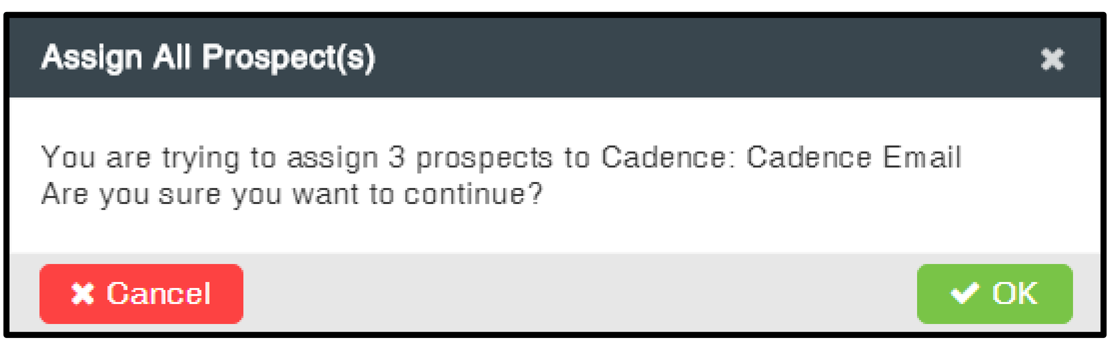
4. A confirmation message will be displayed as shown below. Click **OK** to assign all the prospects to a Cadence or click **Cancel** to cancel the process.



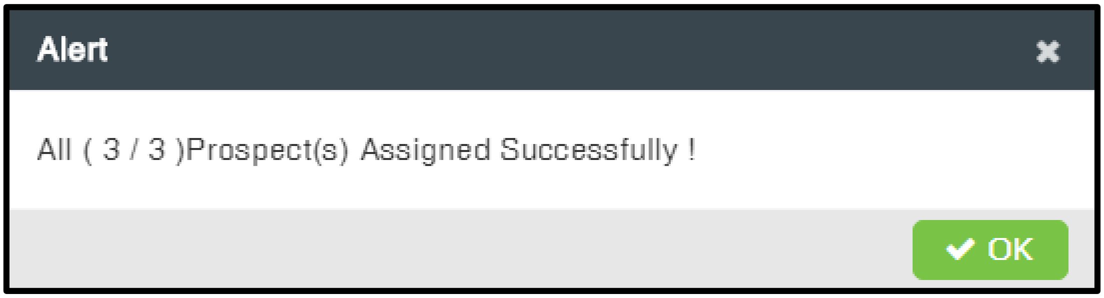
5. On clicking the **OK** button, the **Assign to a Cadence** popup window will be displayed. Select a Cadence to which the prospects have to be assigned and click **Start Cadence**.



6. The following confirmation message will be displayed. Click **OK** to assign the prospects under the selected Cadence or click **Cancel** to cancel the process.

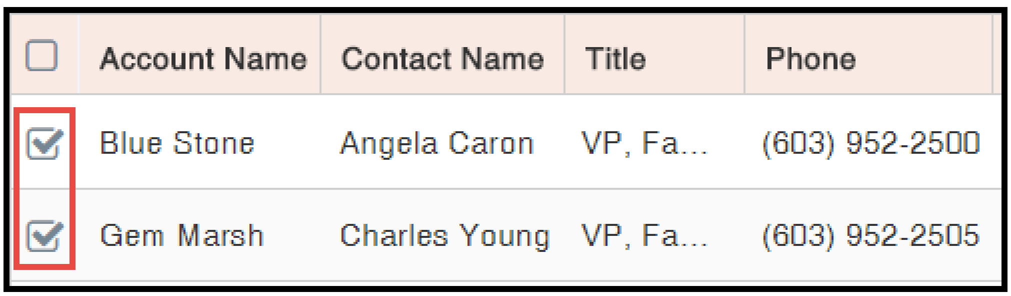


7. After successfully assigning the prospects, an alert message will be displayed, as shown below. Click **OK**.

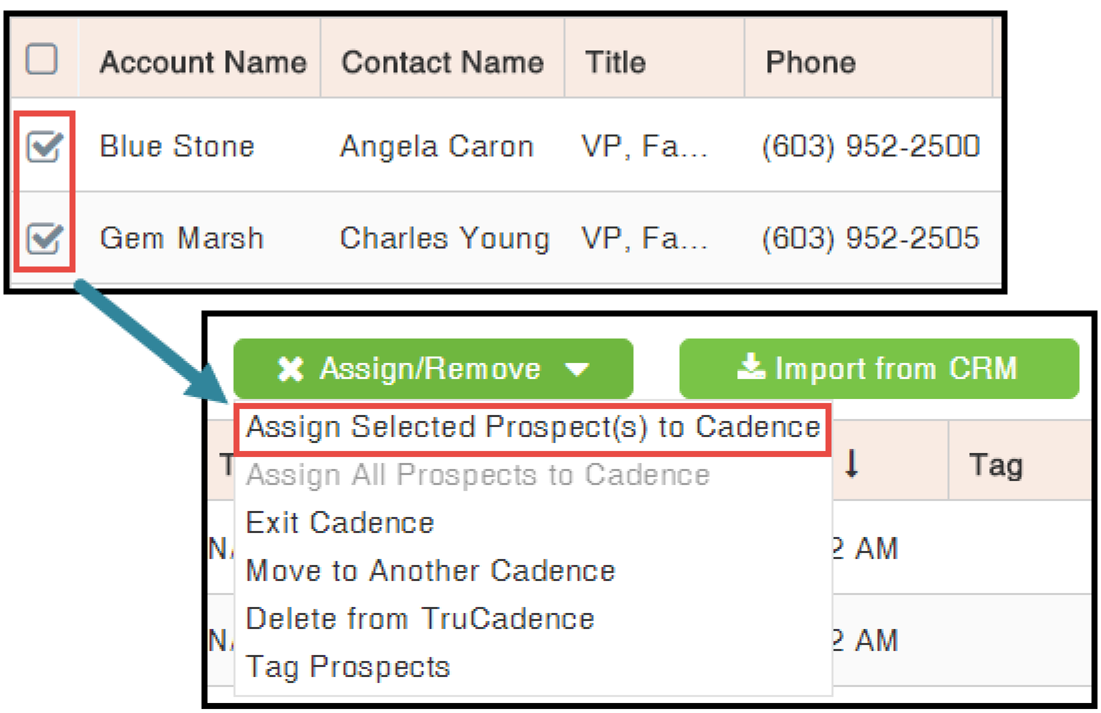


Assign Selected Prospects to a Cadence

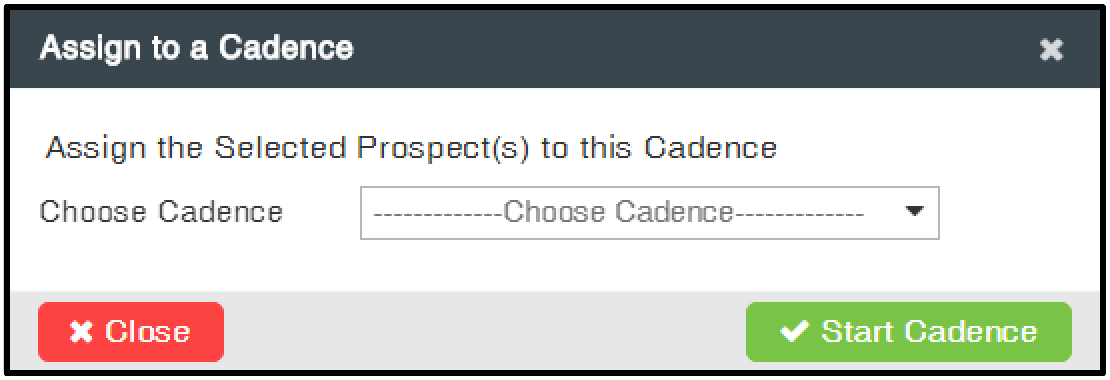
1. In the **Prospects** tab, select the prospects you wish to assign by clicking the checkbox to the left of each prospect.



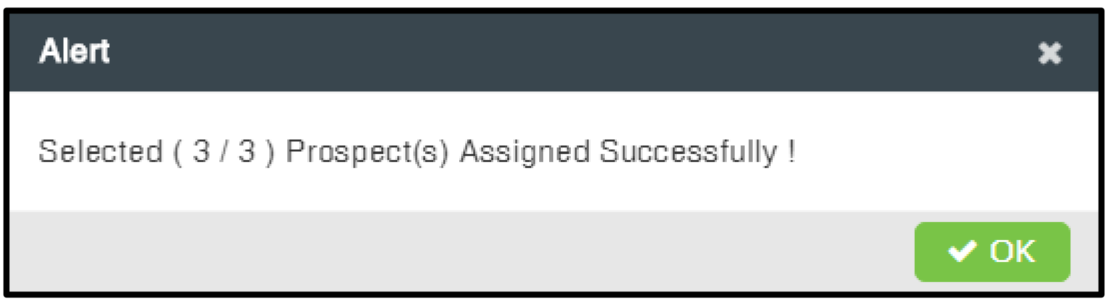
2. Then, select **Assign Selected Prospect(s) to Cadence** from the **Assign/Remove** dropdown.



3. The **Assign to a Cadence** popup window will be displayed. Select the Cadence to which the prospects need to be assigned and click **Start Cadence**.

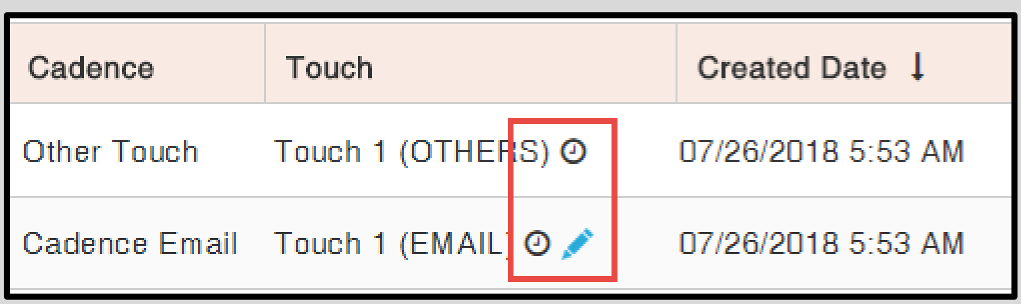


4. After successfully assigning the prospects, an alert message with the assigned prospects count will be displayed, as shown below. Click **OK**.

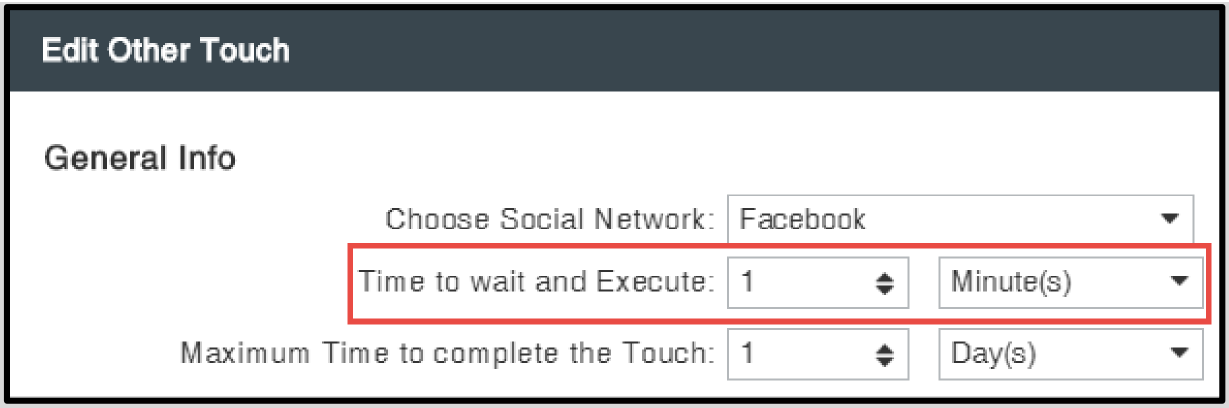


IMPORTANT NOTE

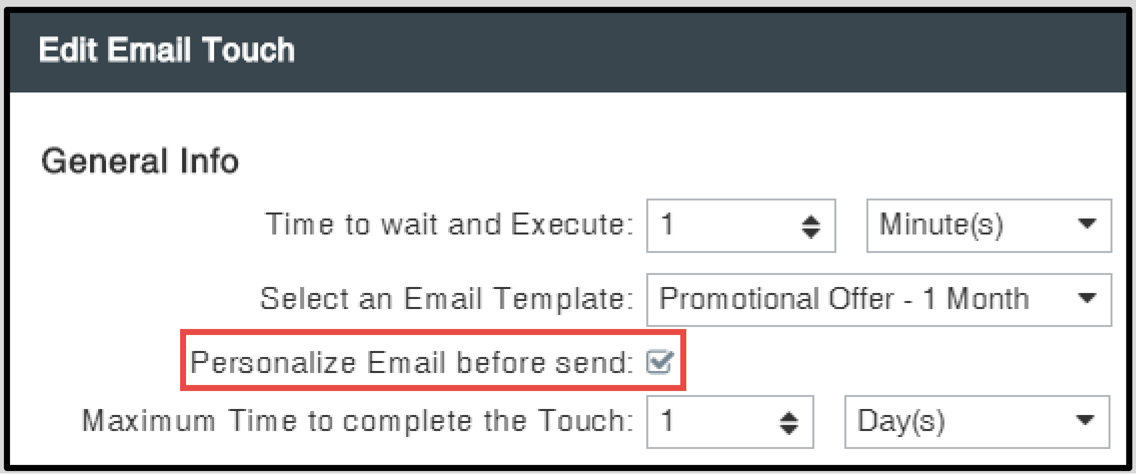
Once the prospects have been assigned to a cadence, you can see the following icons next to the **Touch** sequence:



Indicate the **Prospect is under a wait period**. This icon will be displayed during the period of time between when the prospect is assigned to a Cadence and when it executes (execution period as selected in the **New/Edit Touch** window).



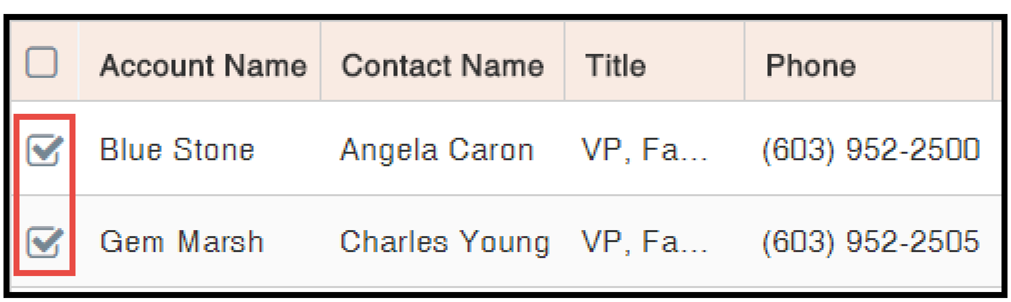
Indicates the Prospect is in an **Email Touch** where the **Preview Email** option is enabled (i.e. Personalize Email before send) in **New/Edit Touch** window. If you see both a clock and a pencil icon, the prospect is in a wait period and will then be going to the preview email touch.



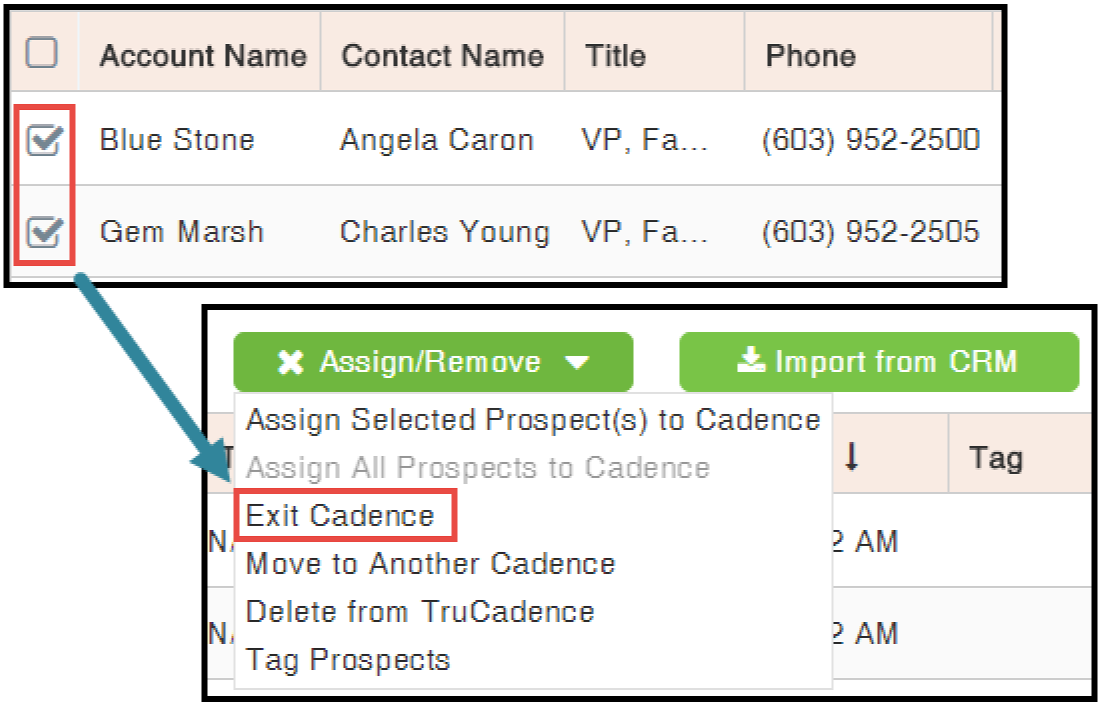
5.3 Exit Prospects from a Cadence

Find the steps below to remove prospects from a Cadence:

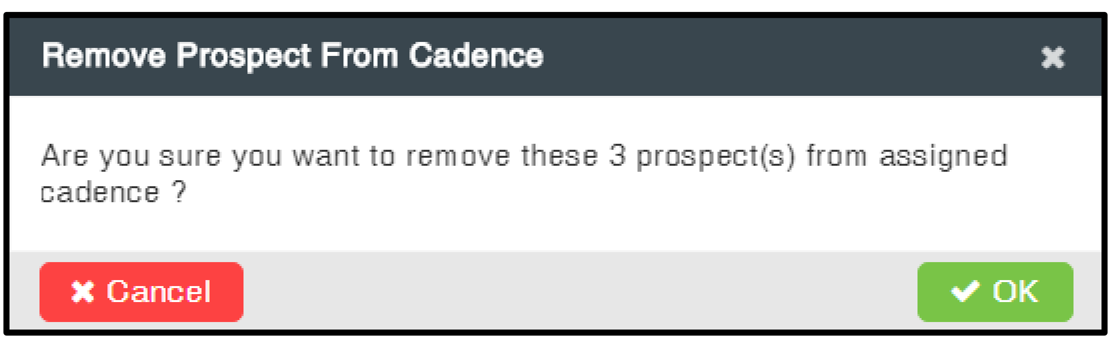
1. In the **Prospects** tab, select the prospects that have to be removed from the assigned Cadence



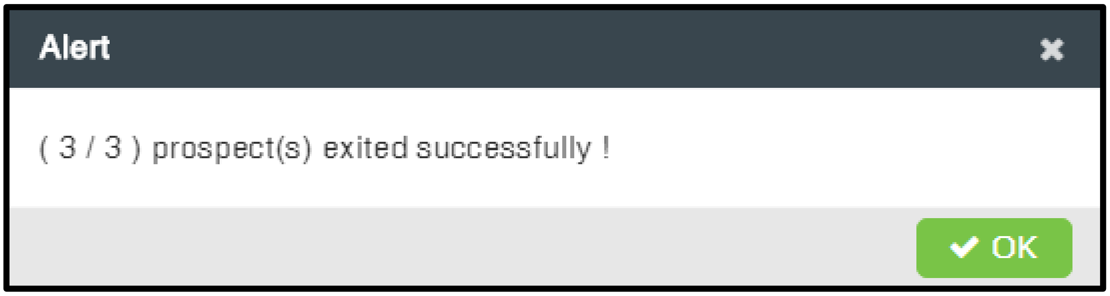
2. Then, select **Exit Cadence** from the **Assign/Remove** dropdown.



3. A confirmation message will be displayed to confirm the removal of the selected prospects from the Cadence, as shown below. Click **OK** to remove the prospects from the Cadence or click **Cancel** to cancel the process.



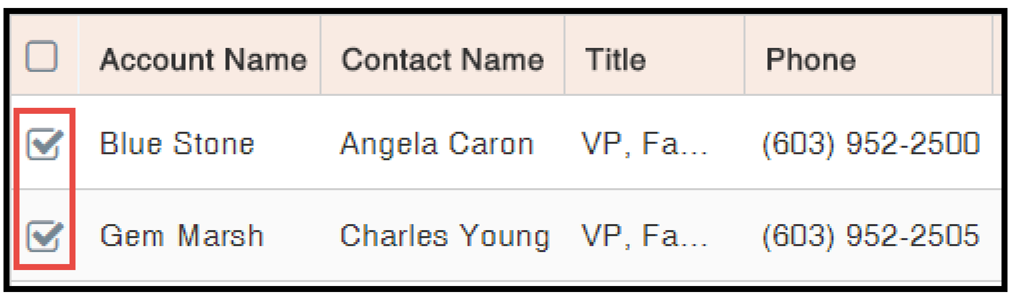
4. After successful removal, the following alert message will be displayed with the removal count. Click **OK**. The prospects will be removed from the Cadence.



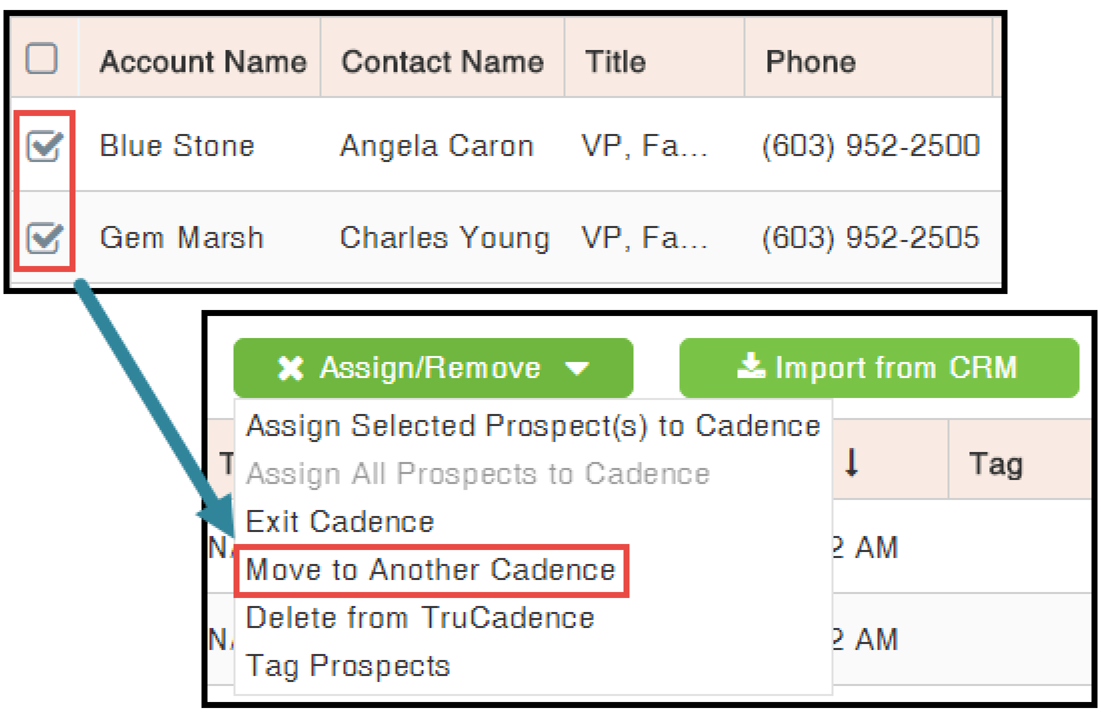
5.4 Move to another Cadence

Find the steps below to move prospects from one Cadence to another Cadence:

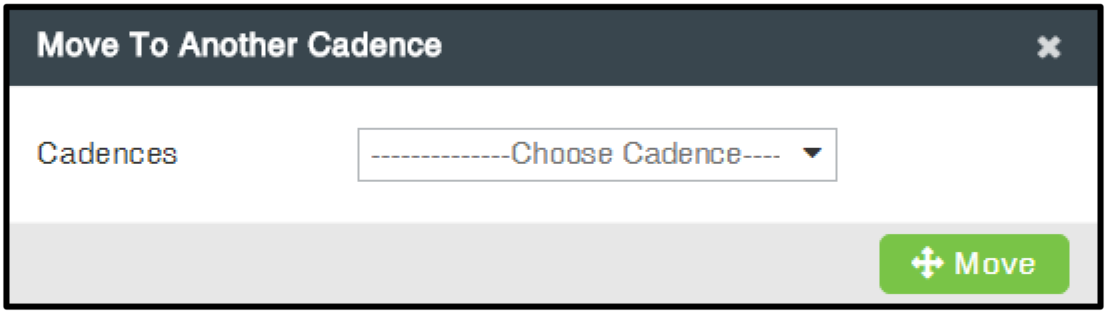
1. In the **Prospects** tab, select the prospects that need to be moved to another Cadence by clicking the checkboxes to the left of the prospects.



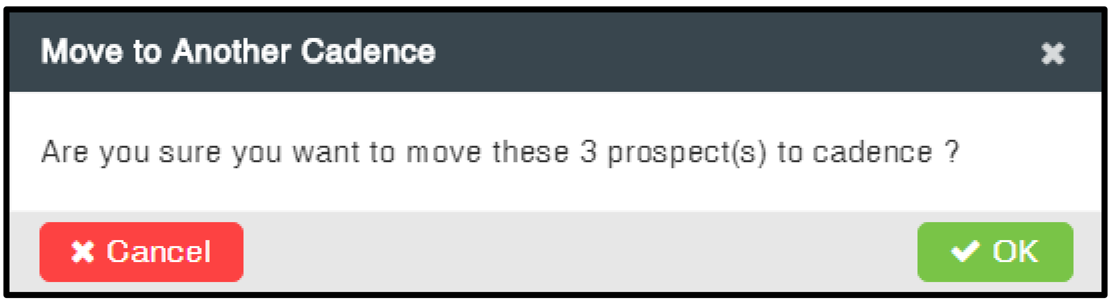
2. Then, select **Move to Another Cadence** from the **Assign/Remove** dropdown.



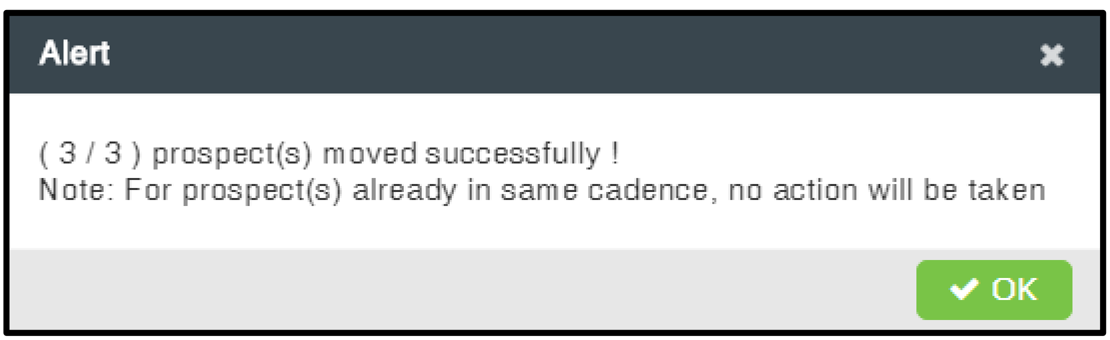
3. The **Move To Another Cadence** popup window will be displayed. Select the Cadence to which the prospects need to be moved and click **Move**.



4. A confirmation message will be displayed, as shown below. Click **OK** to move the prospects to another Cadence or click **Cancel** to cancel the process.



5. After the prospects have been moved successfully to the selected Cadence, an alert message will be displayed as shown below. Click **OK**.



5.5 Delete from TruCadence

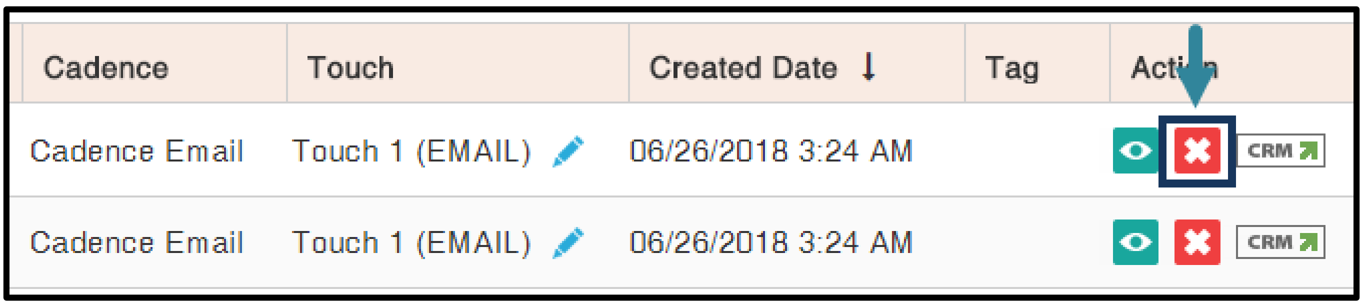
You can either delete a prospect individually or select multiple prospects and delete them from TruCadence.

5.5.1 Delete a Prospect from TruCadence

Find the steps below to delete an individual prospect from TruCadence:

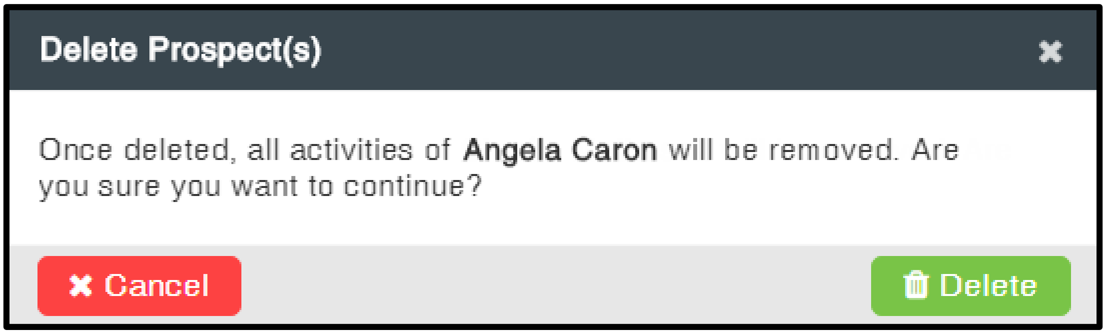
1. In the **Prospects** tab, either search for a prospect you wish to delete using the **Search** option on the top or scroll over the grid and select a prospect.

2. Click on the **Delete** icon  to the right of the prospect.

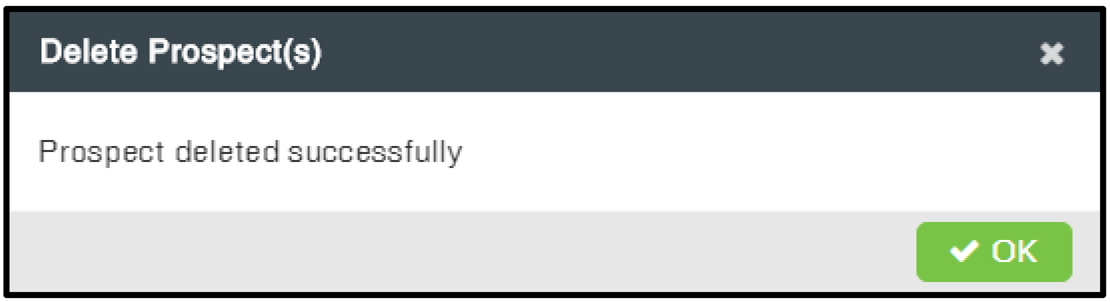


3. A confirmation message will be displayed, as shown below. Click **OK** to delete the prospect from TruCadence or click **Cancel** to cancel the process.

4. Once again, a confirmation message will be displayed to ensure the deletion, as the record cannot be recovered. Click **Delete** to delete the prospect.



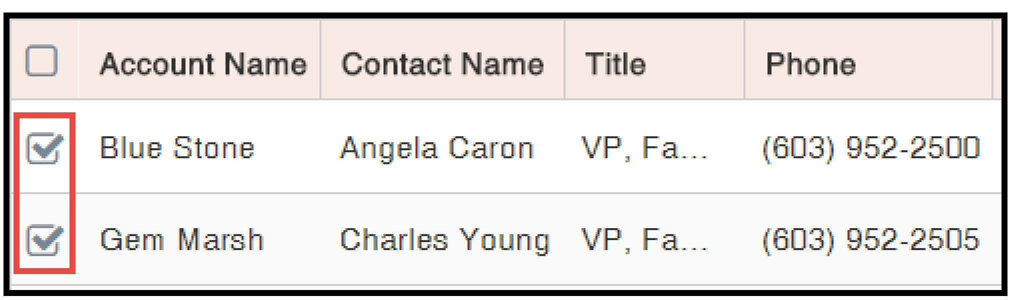
5. After successful deletion, the alert message shown below will be displayed. Click **OK**.



5.5.2 Delete Prospects from TruCadence

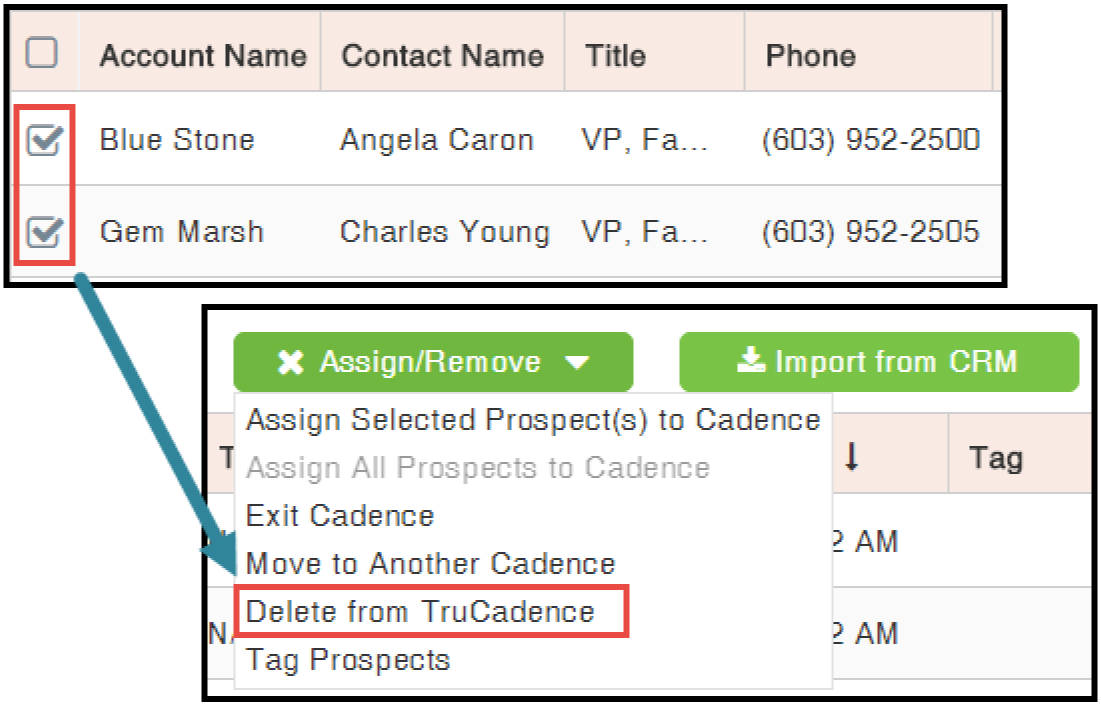
Find the steps below to delete multiple prospects from TruCadence:

1. In the **Prospects** tab, select the prospects that have to be deleted by clicking the checkboxes to the left of the respective prospects.

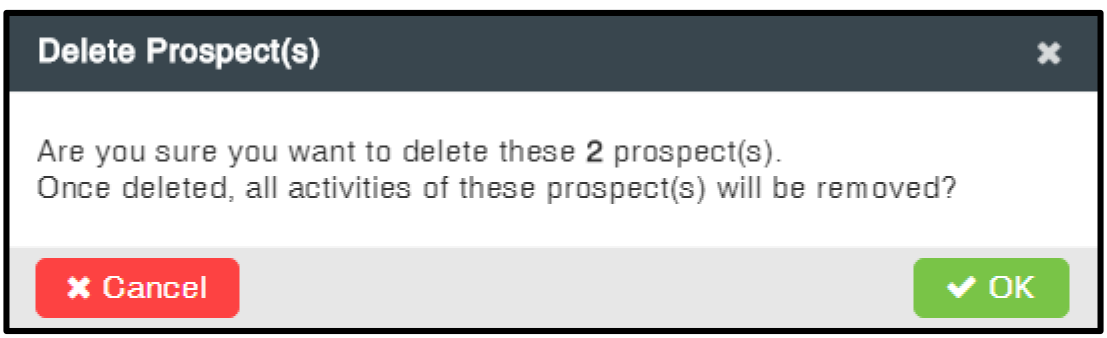


	Account Name	Contact Name	Title	Phone
☑	Blue Stone	Angela Caron	VP, Fa…	(603) 952-2500
☑	Gem Marsh	Charles Young	VP, Fa…	(603) 952-2505

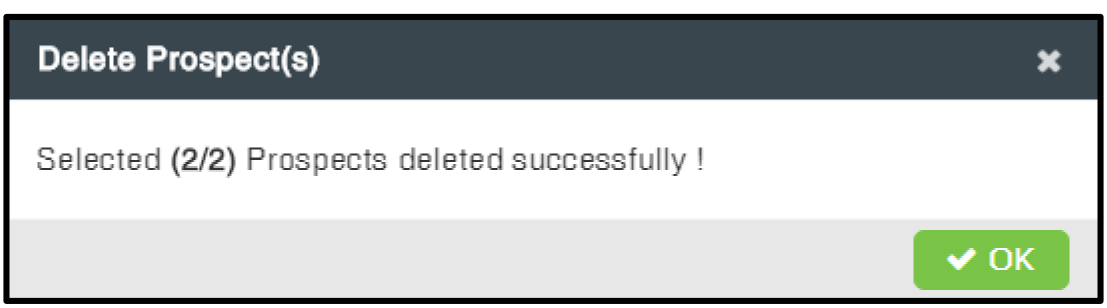
2. Select the option '**Delete from TruCadence**' from the **Assign/Remove** dropdown.



3. A confirmation message will be displayed, as shown below. Click **OK** to delete the prospects from TruCadence or click **Cancel** to cancel the process.

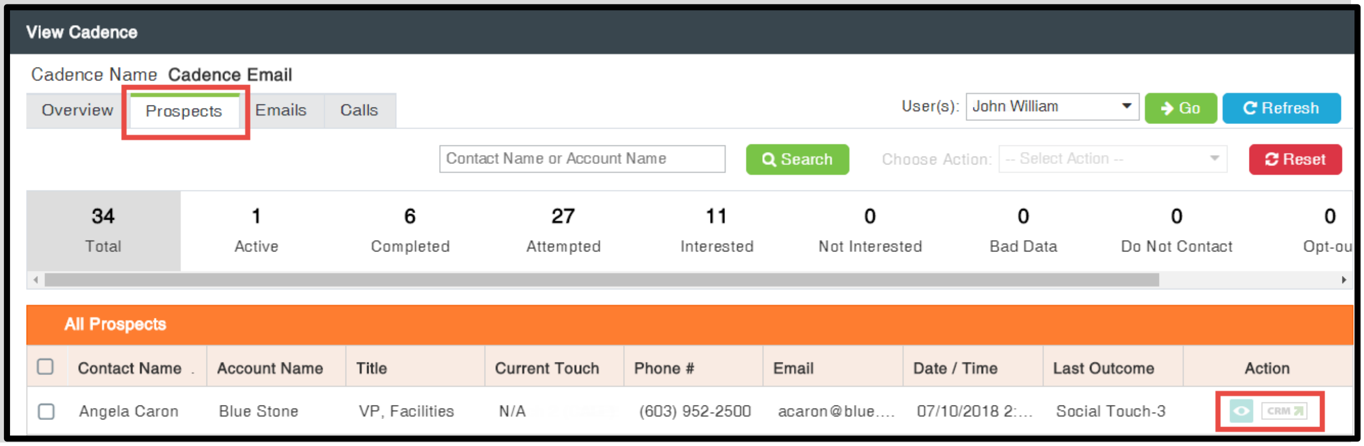


4. After successful deletion, the alert message shown below will be displayed with the prospects count. Click **OK**.



IMPORTANT NOTE

- Prospects deleted from TruCadence cannot be recovered but can be uploaded as a new prospect
- Though the prospect assigned to a Cadence is deleted, the prospect's record will still exist under the **View Cadence ► Prospects** tab. But the **View** icon for the record will be disabled and indicates the prospect has been deleted from TruCadence

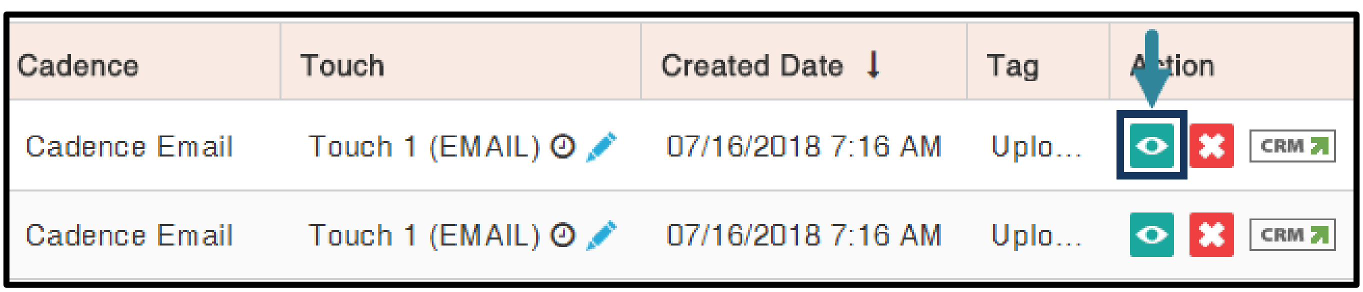


5.6 View Prospect Information

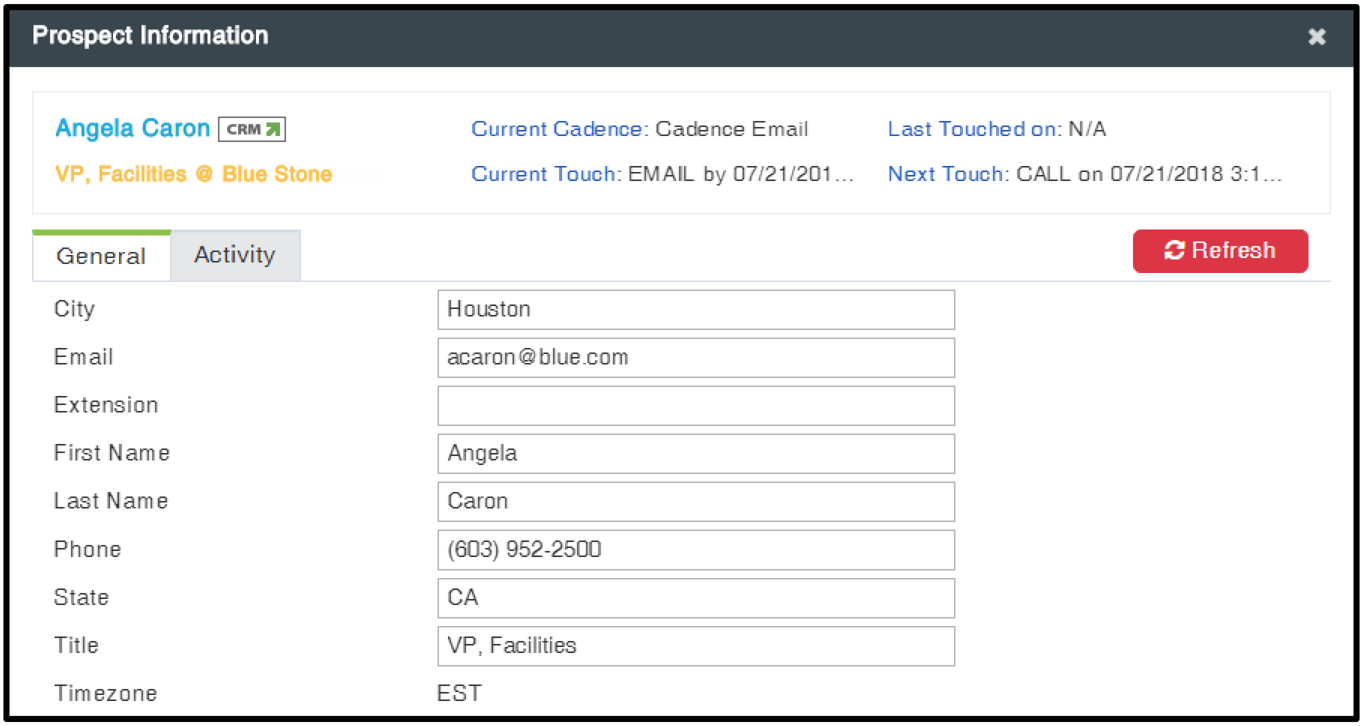
Find the steps below to view the activity of a prospect:

1. In the **Prospects** tab, either search for a prospect you wish to view using the **Search** option on the top or scroll over the grid and find the prospect.

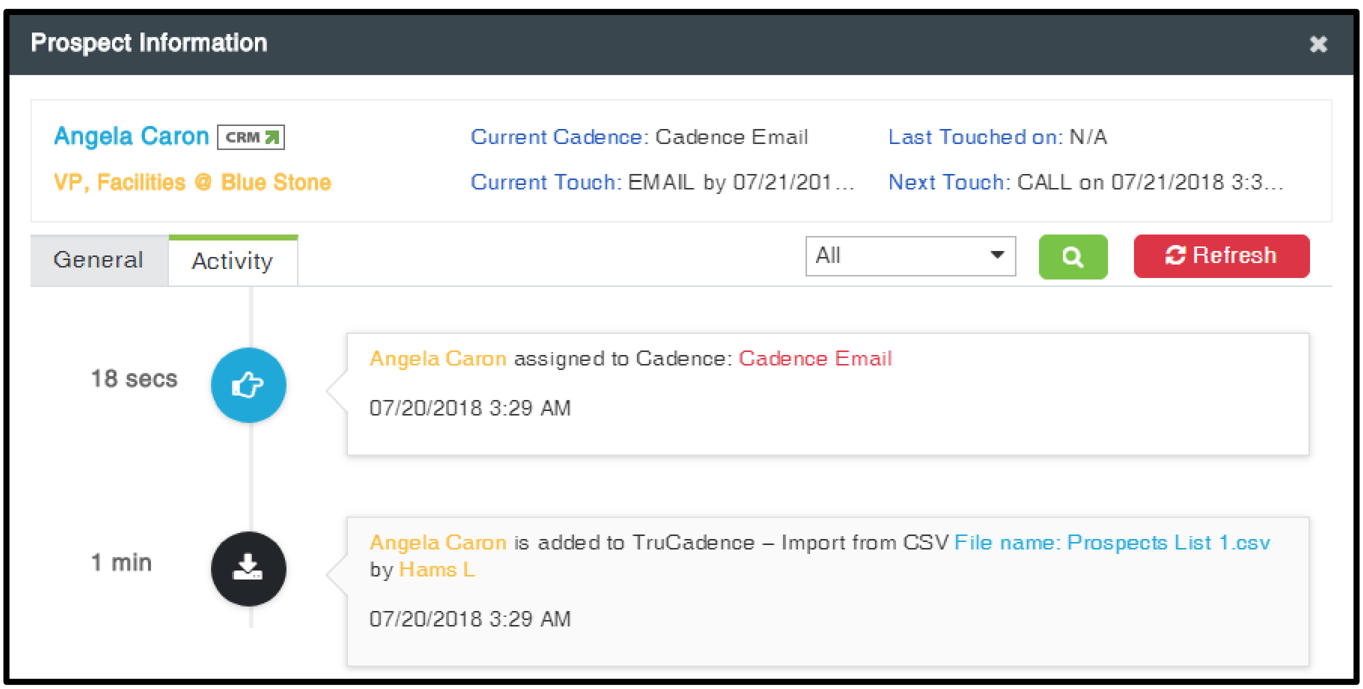
2. Click on the **View** icon to the right of the prospect.



3. The **Prospect Information** popup window will be displayed; here you can find the prospect information and the activities performed, in detail.

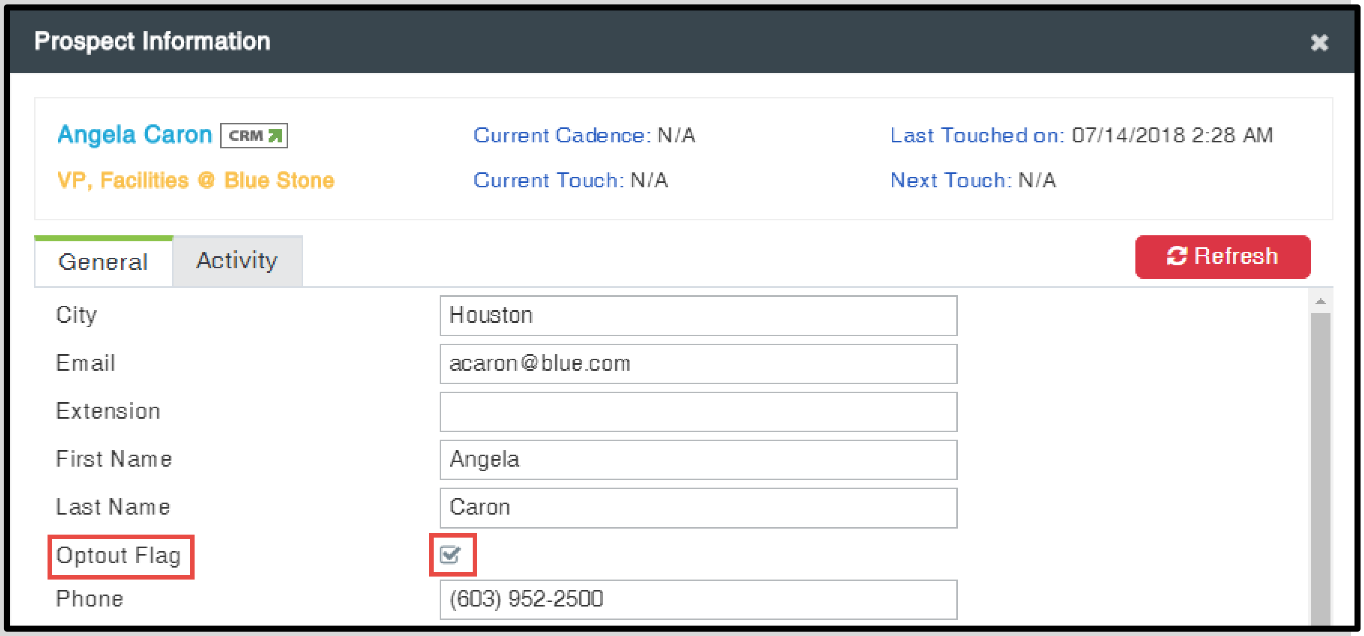


4. Click on the **Activity** tab of **Prospect Information** window to view the activities performed on the prospect.



IMPORTANT NOTE

If the prospect has selected the ‘**Optout Flag**’ in the **Prospect Information** window, then no emails will be sent to the prospect from TruCadence, even when the prospect is assigned to a Cadence containing Email Touch.



For further details, please refer to **Email Optout** section.

5.7 Open CRM Window (only for CRM users)

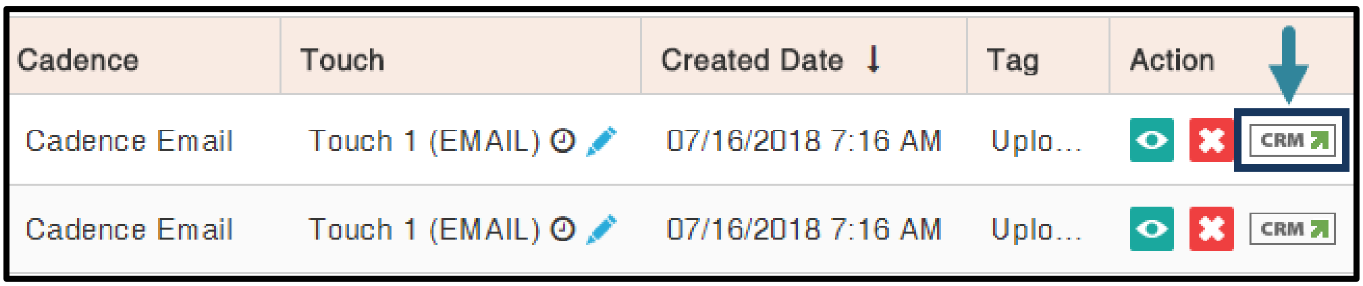
In the **Prospects** tab, you can view and update the prospect's information directly in the CRM using the **CRM** icon.

NOTE: The CRM button will be displayed **<u>only for CRM users</u>**.

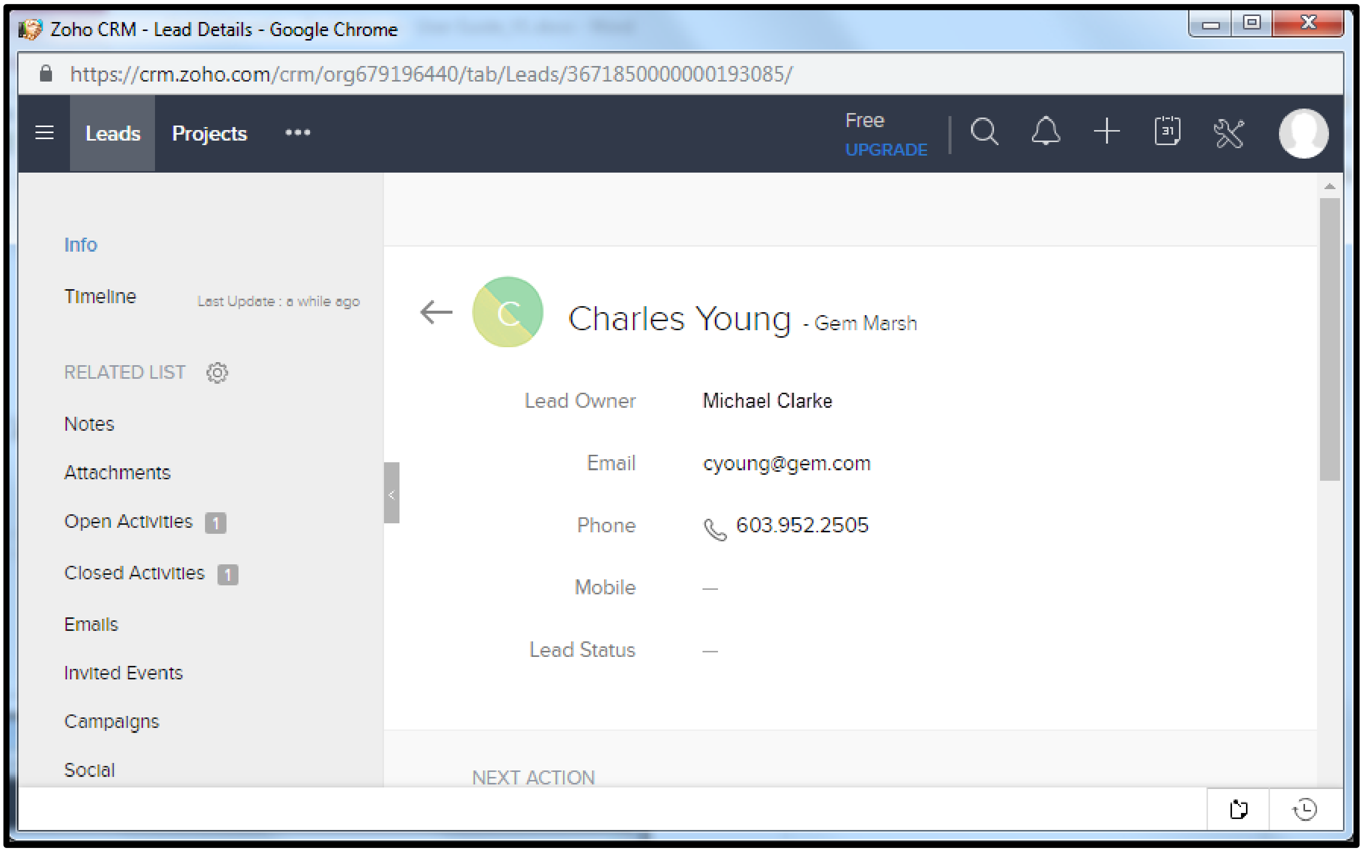
Find the steps below to view the prospect information in the CRM:

1. In the **Prospects** tab, either search for a prospect you wish to view using the **Search** option on the top or scroll over the grid and find the prospect.

2. Click on the **CRM** button to the right of the prospect you wish to view.



3. The CRM window with the respective prospect's information will be displayed. If needed, you can edit the prospect information by clicking the **Edit** button.


Zoho CRM - Lead Details - Google Chrome
https://crm.zoho.com/crm/org679196440/tab/Leads/3671850000000193085/
Leads
Projects
Free
UPGRADE
Info
Timeline
Last Update : a while ago
RELATED LIST
Notes
Attachments
Open Activities 1
Closed Activities 1
Emails
Invited Events
Campaigns
Social
Charles Young - Gem Marsh
Lead Owner
Michael Clarke
Email
cyoung@gem.com
Phone
603.952.2505
Mobile
Lead Status
NEXT ACTION

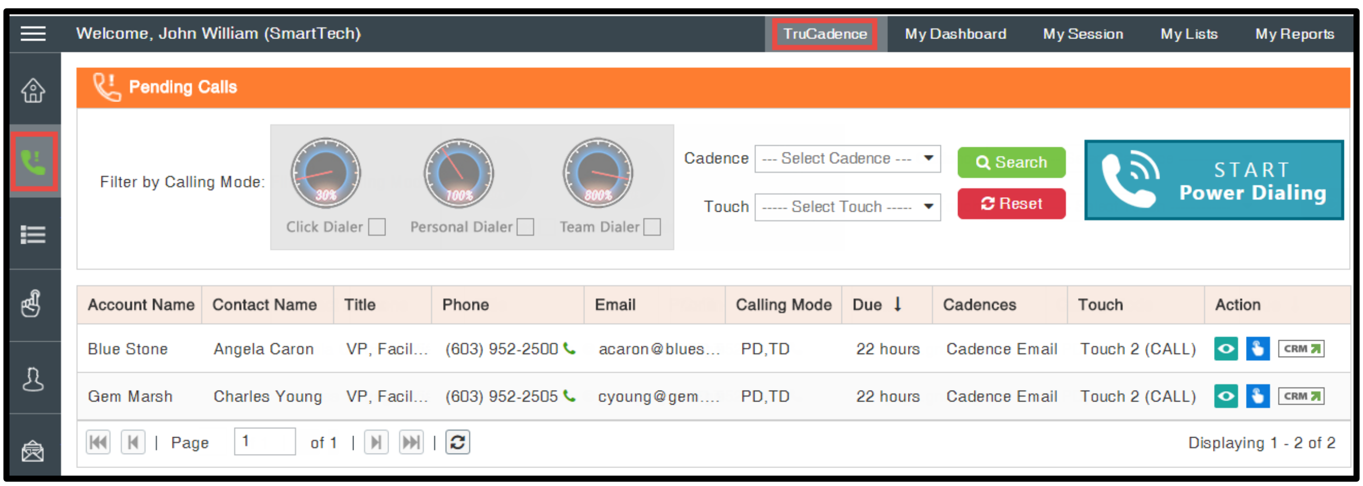
Chapter 6 – Pending Calls

This chapter covers the following topics:

- Initiate the Dialing Session
- View Prospect Activities
- View Touch info
- Open CRM Window (only for CRM users)

In the **Pending Calls** tab, prospects that were added in a Cadence (assigned with **Call Touch** and/or **Call & VM Touch**) will be listed here to initiate a dialing session, via any of the ConnectLeader dialers that you have licensed.

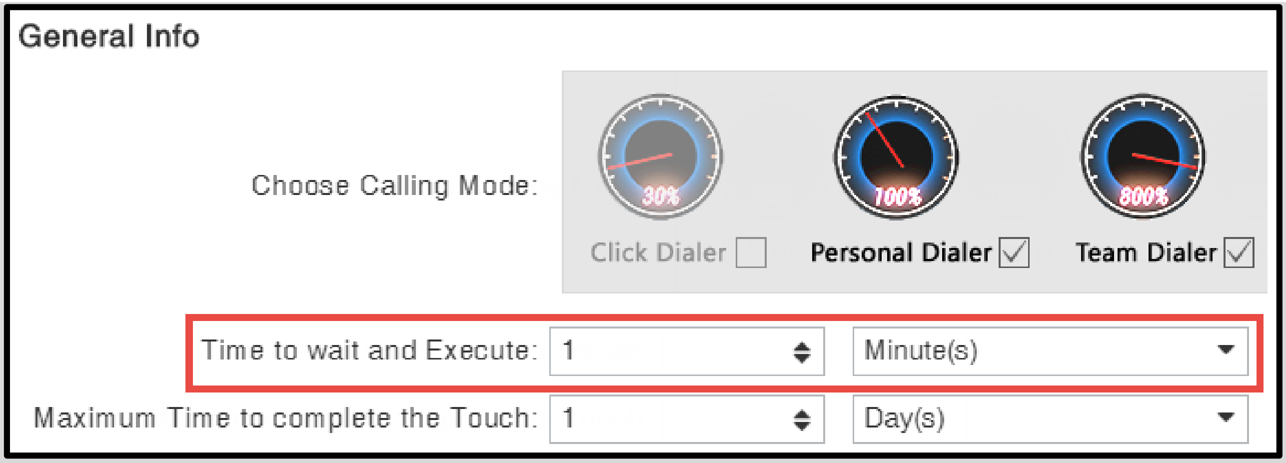
Navigation	TruCadence ► Pending Calls tab



If there are any records logged in this tab, the **Pending Calls** icon in the left menu pane will glow in **Green** to easily identify you have pending calls waiting to be dialed.

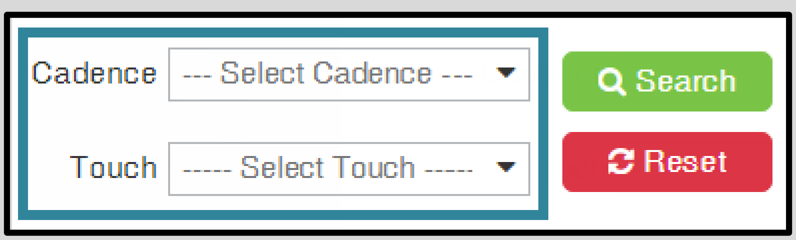
IMPORTANT NOTE

- Prospects under a Cadence (assigned with **Call Touch**) will be moved to the Pending Calls tab for dialing, only after the time specified in the **Time to wait and Execute** field of the **Call Touch** window, refer to the **Call Touch** section for further information



- **Filter by Calling Mode –** Dialers (Team Dialer/Personal Dialer/Click Dialer) that you have purchased or have licensed will only be available in the **Pending Calls** tab, to filter. Prospects matching the search criteria (i.e. calling mode) will only be displayed in the grid for dialing, when clicking the **Search** button.

- **Filter by Cadence & Touch** – Dial the prospects with high priority based on the Touch sequence assigned to a Cadence



6.1 Initiate the Dialing Session

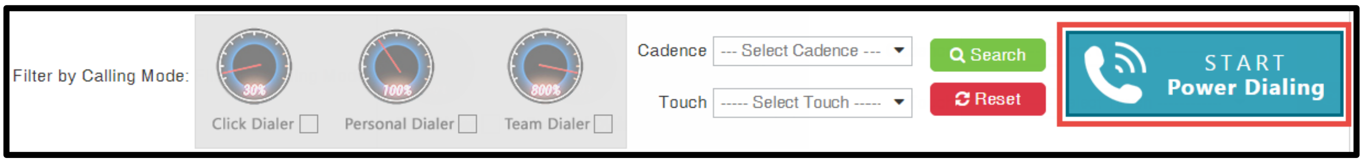
6.1.1 Calling Mode – Team Dialer / Personal Dialer

Find the steps below to initiate a dialing session through **Team Dialer** or **Personal Dialer**:

1. In the **Pending Calls** tab, you can either dial all prospects at once or you can filter the prospects by a Cadence and/or Touch sequence and/or Calling mode (Team Dialer/Personal Dialer/Click Dialer) and dial.

   To dial all prospects

   a. Click on the **START Power Dialing** button to start the dialing session for all prospects.



IMPORTANT NOTE

If the prospects in each touch are in different calling modes, you can still dial them all in one by clicking the **Start Power Dialing** button.

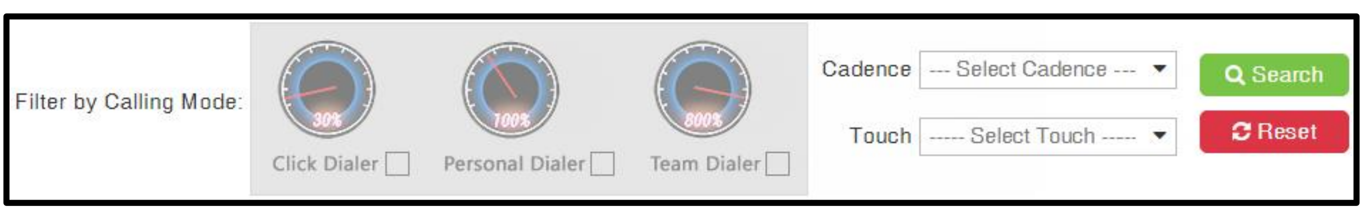
Scenario 1 – With no Filter

If you do not filter by a **Calling Mode** and/or by Cadence & Touch sequence then when clicking the **Start Power Dialing** button all prospects under the **Pending Calls** tab will move to the ConnectLeader product that you used last - **Team Dialer** or **Personal Dialer**. Later, you can change the product in the ConnectLeader portal you would like to dial through, from the **Dialer Mode** dropdown.

Scenario 2 – With applied Filter

If you filtered by a product, then when clicking the **Start Power Dialing** button, only the prospects filtered under the **Pending Calls** tab will move to the last ConnectLeader product that you used. Later, you can change the product in the ConnectLeader portal you would like to dial through, from the **Dialer Mode** dropdown.

Filter and dial the prospects



a. Select a Cadence from the **Cadence** dropdown and/or select a Touch sequence from the **Touch** dropdown.

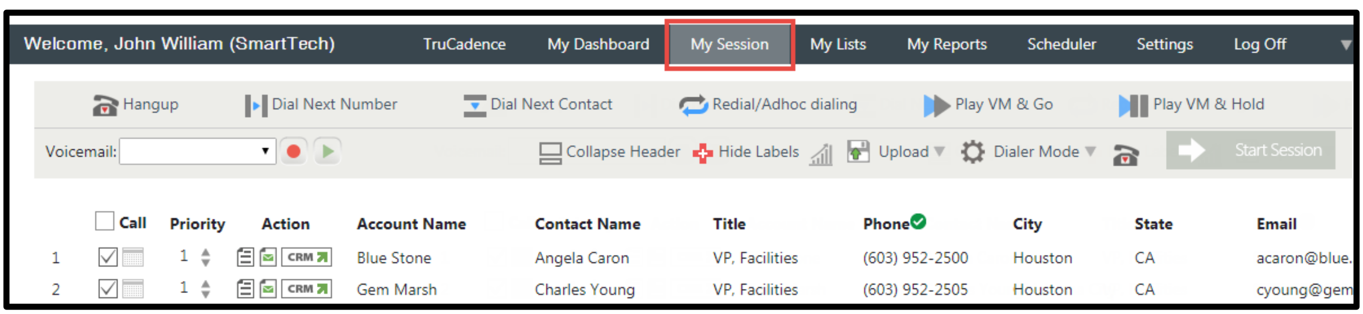
b. To filter further, select a calling mode the prospects are assigned to dial.

c. Click on the **Search** button to fetch the prospects based on the search criteria.

d. Now, click on the **START Power Dialing** button to start the dialing session for the filtered prospects.

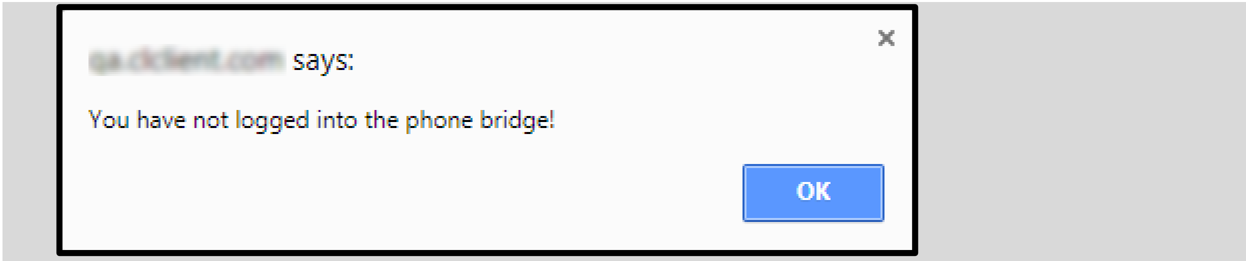
2. A confirmation message will be displayed as shown below. Click **Proceed** to move the prospects to the dialing sessions – **My Session** tab or click **Cancel** to cancel the process.

On clicking the **Proceed** button, the screen automatically redirects from **TruCadence** to the **My Session** tab, where the prospects you have chosen will be.



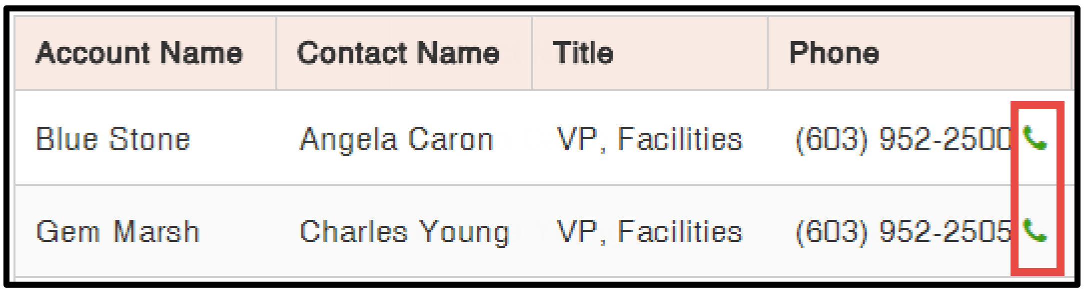
IMPORTANT NOTE

- If you try to start the session in the **My Session** tab without connecting to the phone bridge, then the following alert message will be displayed:



6.1.2 Calling Mode – Click Dialer

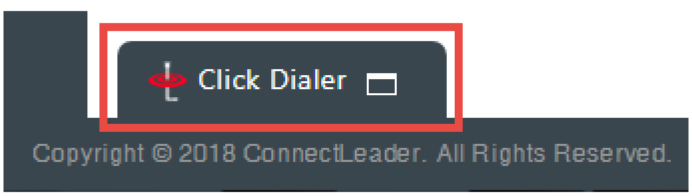
If you have a license for Click Dialer, then a **green phone** icon will be displayed next to the phone numbers as shown below.



Account Name	Contact Name	Title	Phone
Blue Stone	Angela Caron	VP, Facilities	(603) 952-2500
Gem Marsh	Charles Young	VP, Facilities	(603) 952-2505

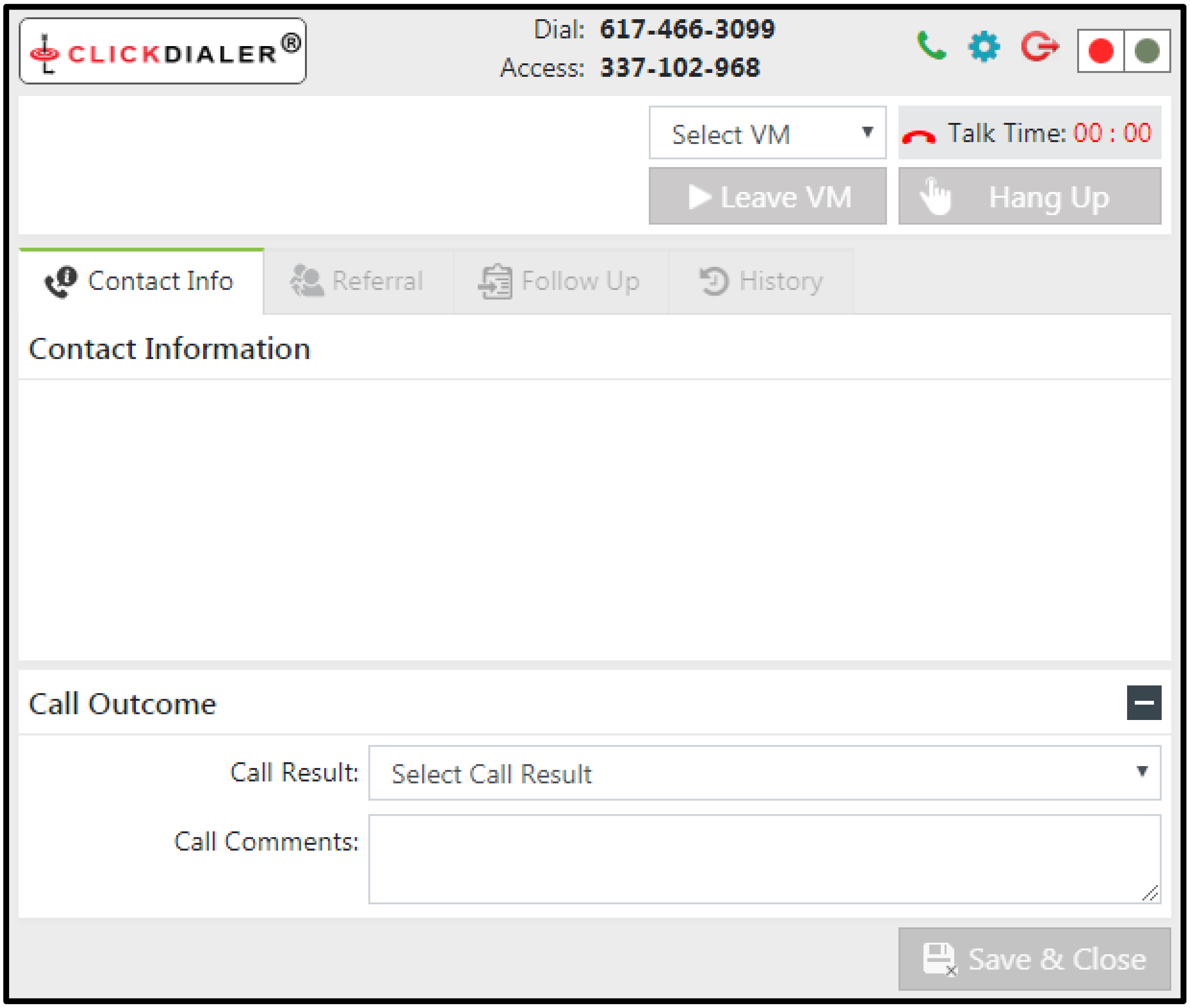
Find the steps below to bring up the Click Dialer popup window:

1. Click on the **Click Dialer** menu at the bottom of the **TruCadence ► Pending Calls** tab.



NOTE: Click Dialer will only be displayed on the **Pending Calls** tab.

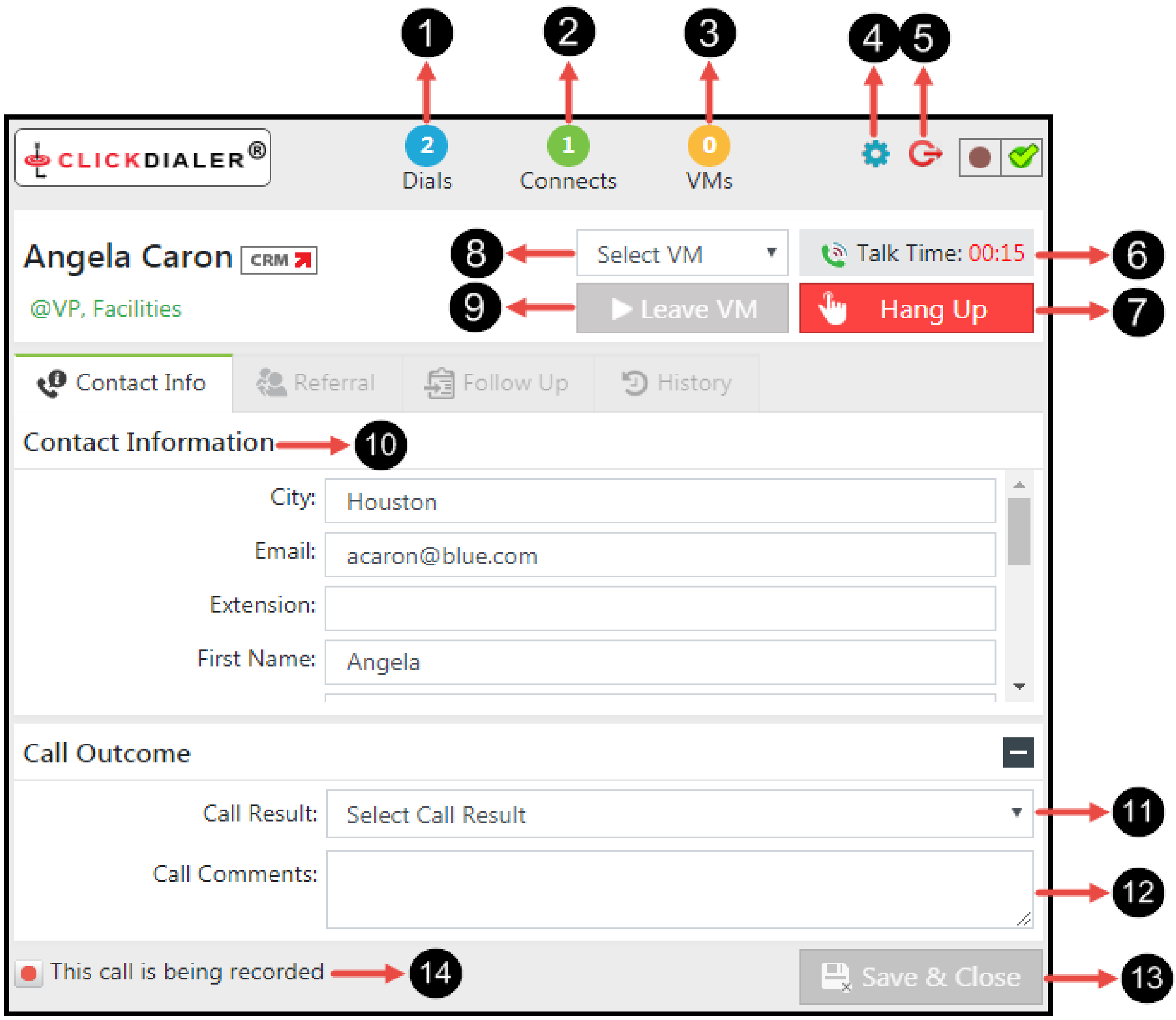
2. The **Click Dialer** window will popup, as shown below:



3. Dial the number and enter the access code as shown in the Click Dialer popup window, to dial into the conference bridge.

4. A white check mark in the green circle indicates that the connection is ready.

The following fields are available in the Click Dialer popup window:



1 **Dials** – Number of dials made during the dialing session. The count will keep increasing on each dial made.

2 **Connects** – Number of connected calls during the dialing session. The count will keep increasing with each dispositioned call.

3 **VMs** – Number of voicemails left during the dialing session. The count will keep increasing on each VM left when using the VM drop.

4 **Settings** – Click to enable the settings required. For further information, please refer to the **Click Dialer Settings** section.

5 **End Session** – Click to disconnect the phone bridge and to end the session.

6 **Talk Time** – Duration of the current call.

7 **Hang Up** – Click to hang-up (disconnect) the current call.

8 **Select VM** – Select the required VM from the dropdown that has to be left for the prospect.

9 **Leave VM** – Click to leave the Voicemail selected.

10 **Contact Information** – Contact information of the prospect that you are dialing.

11 **Call Result** – Select an appropriate call result (call outcome) from the dropdown.

12 **Call Comments** – Note/comments regarding the call (if any).

13 **Save & Close** – Click to save the call outcome and minimize the Click Dialer window.

14 **Call Record** – Indicates the call is being recorded.

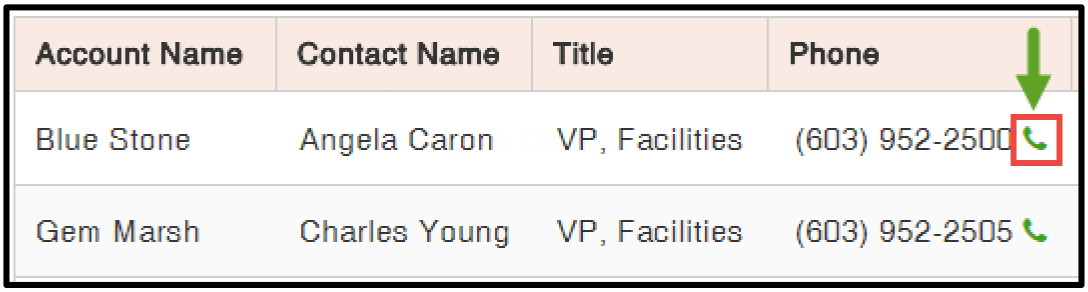
IMPORTANT NOTE

The Call Record icon will be displayed only if your manager has enabled the Call Recording function for the calls you make.

Find the steps below to initiate a dialing session through **Click Dialer**:

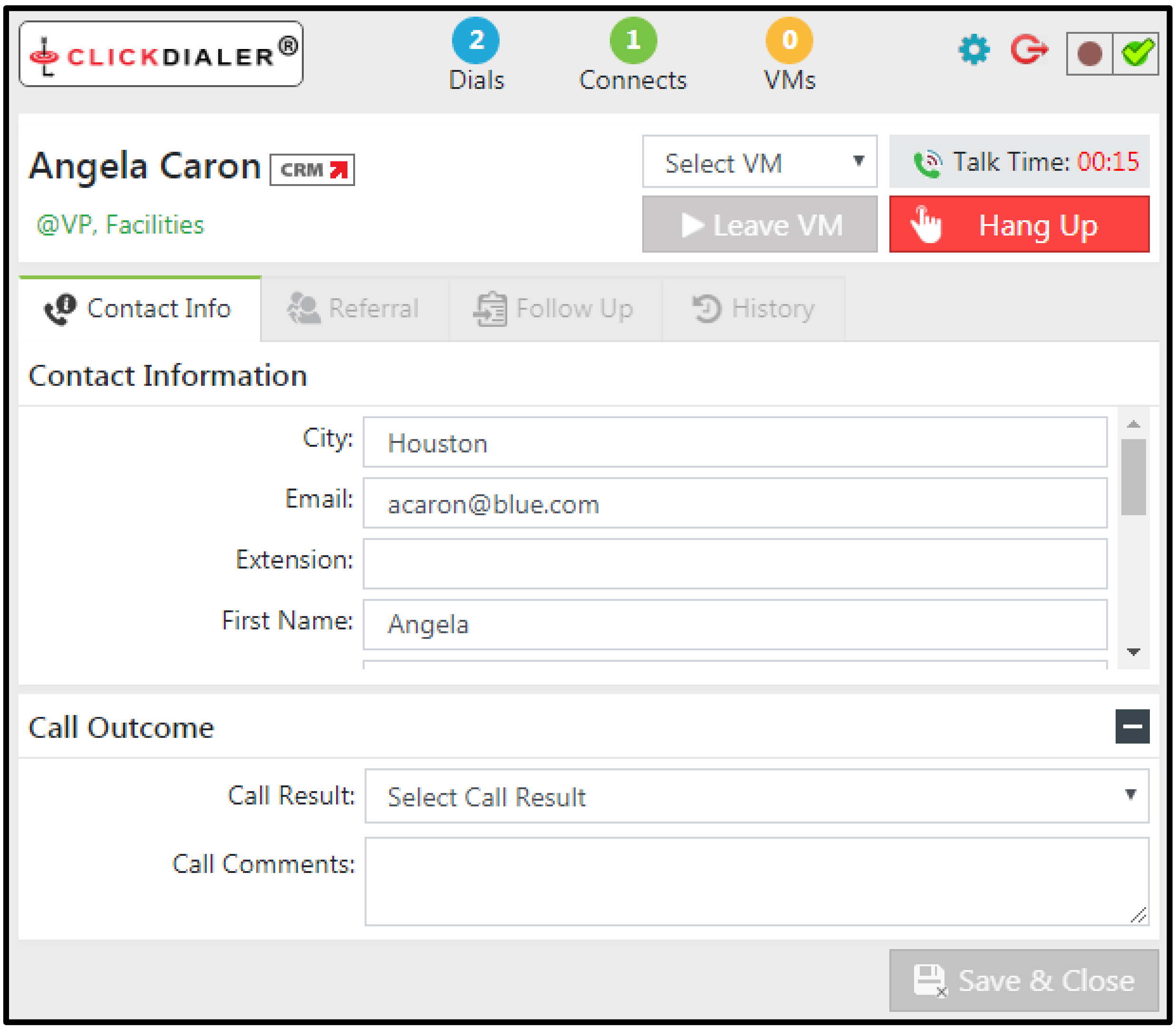
1. After logging into the conference bridge by dialing the **Dial** & **Access** code, minimize the Click Dialer popup window.

2. Now, click on the **green phone** icon next to the phone number you wish to call, in the **TruCadence ► Pending Calls** tab.

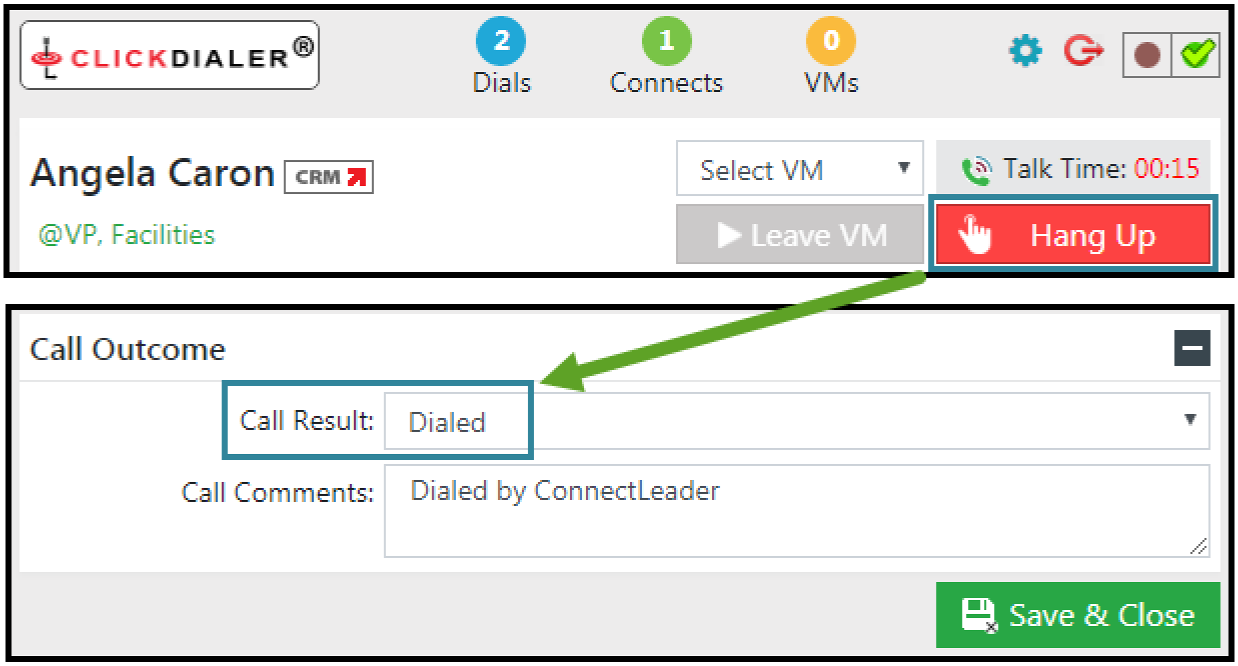


Account Name	Contact Name	Title	Phone
Blue Stone	Angela Caron	VP, Facilities	(603) 952-2500
Gem Marsh	Charles Young	VP, Facilities	(603) 952-2505

3. The **Click Dialer** popup window will open and place the call.

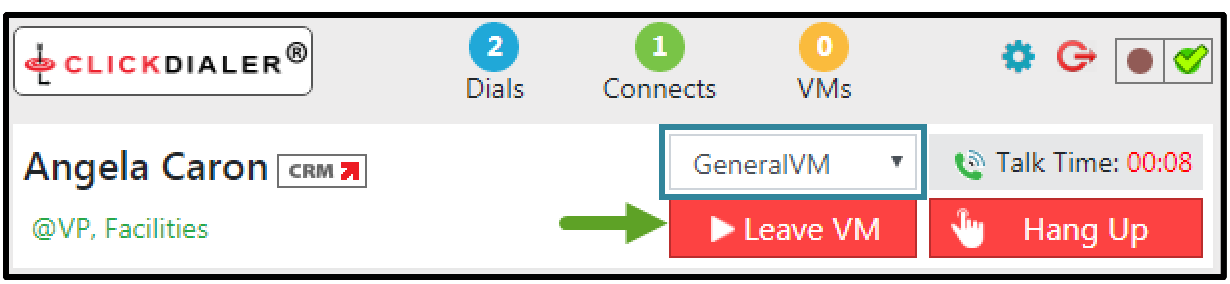


4. When the call is completed, click **Hangup** and select a call outcome from the **Call Result** dropdown.



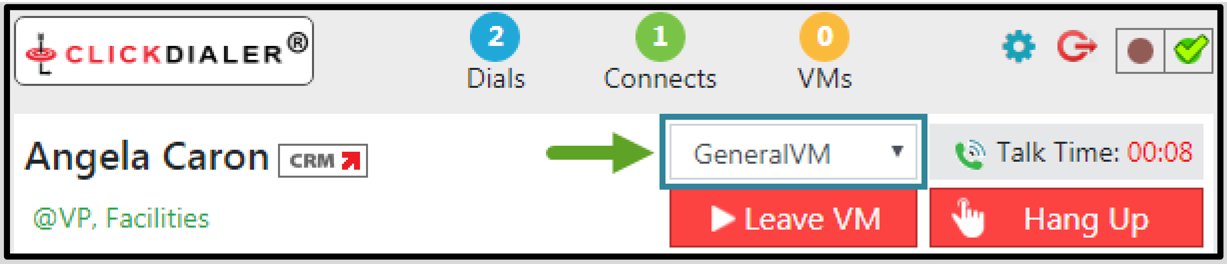
OR

<u>If the prospect does not answer</u>, you can leave a pre-recorded voicemail by selecting the appropriate **Voicemail** from the **Select VM** dropdown, listen to the prospects voicemail, and when you hear the beep, click the **Leave VM** button. Left VM will automatically be selected in the Call Result field.



<u>IMPORTANT NOTE</u>

Voicemails that were recorded previously in the Click Dialer module for the user will be displayed in the **Select VM** dropdown.



You can record a new **Voicemail** from the Click Dialer popup window itself, by following the instructions in the [Record a Voicemail](#record-a-voicemail) section.

5. Click the **Save & Close** button to save the call outcome and to close the window.

6. Follow **Steps 2** through **5** to dial another number.

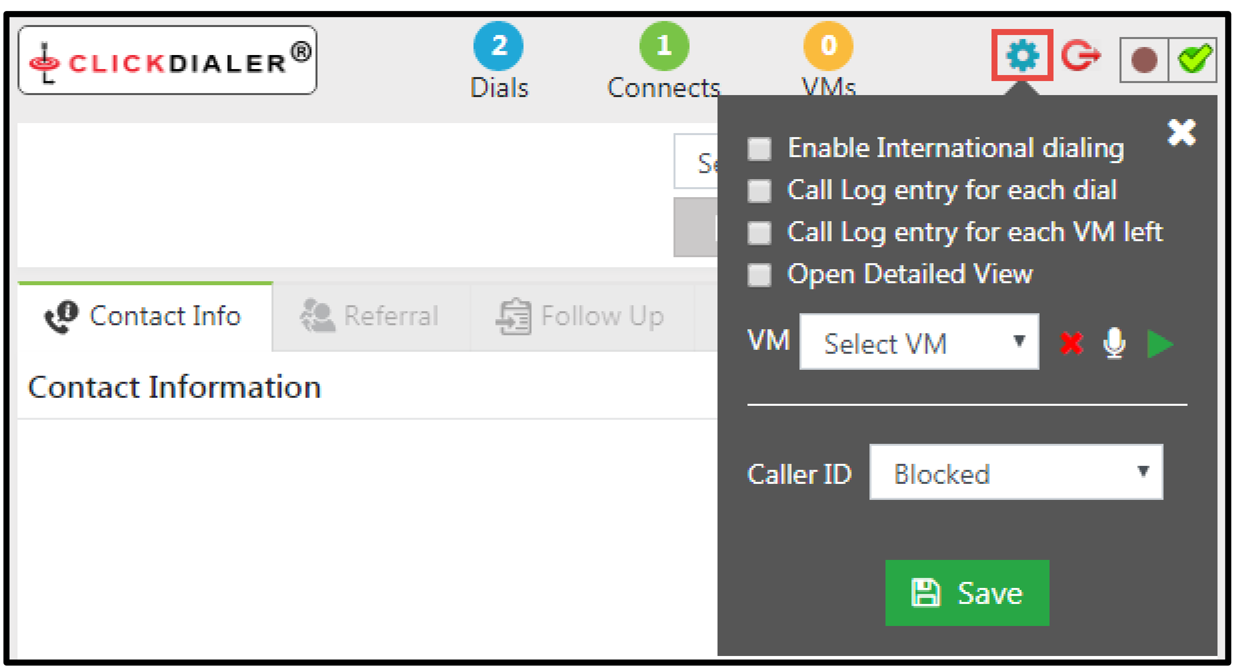
Record a Voicemail

In the Click Dialer popup window, you can record a voicemail, play back a recorded voicemail and choose the voicemail that you wish to send to the prospect.

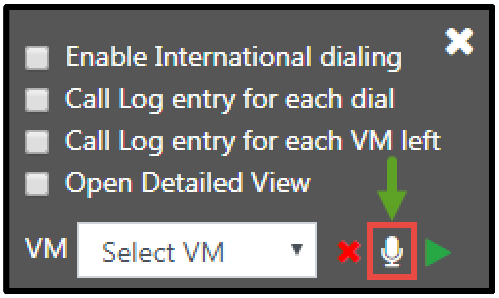
Pre-requisites

Before recording a Voicemail, please ensure you have logged into the Phone Bridge using the Dial and Access Code visible on the Click Dialer popup window.

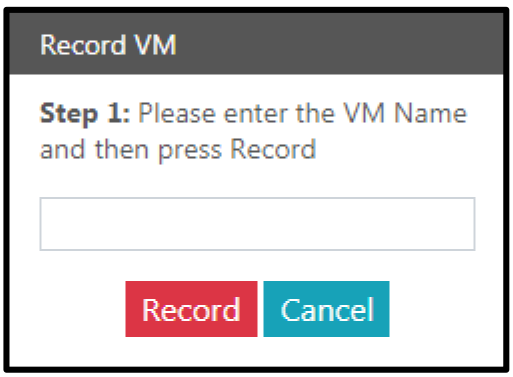
1. Click on the **Settings** icon to bring up the Click Dialer Settings window.



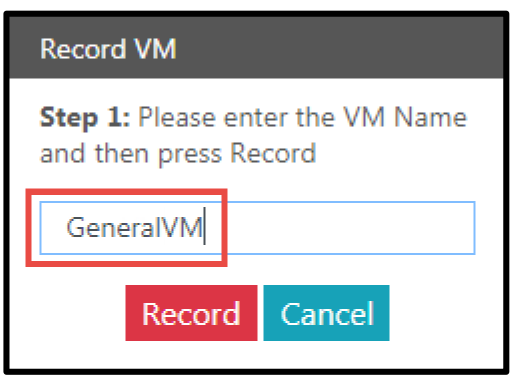
2. To record a new voicemail, click on the **Record VM** icon next to the **VM** field.



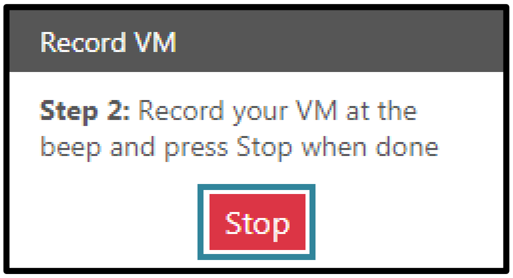
3. The **Record VM** popup window will open.



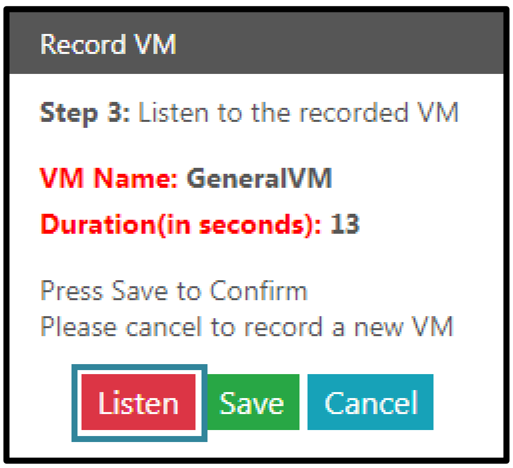
4. Provide a name for your voicemail and click on the **Record** button to start recording the voicemail.



5. Once the recording has been completed, click on the **Stop** button to stop recording.

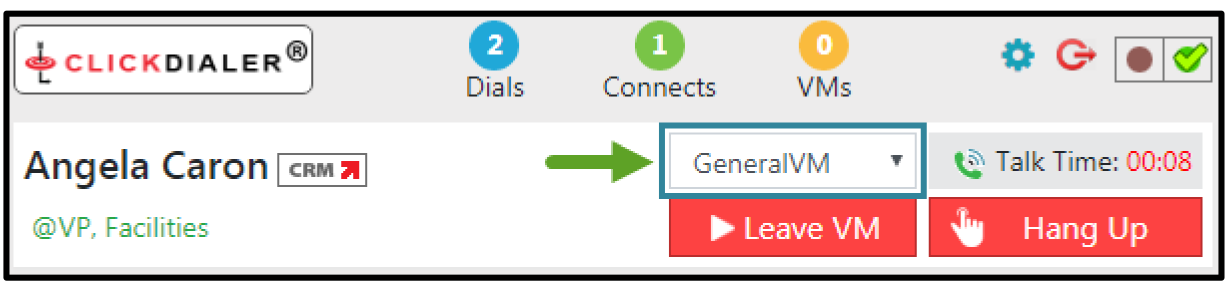


6. Click on the **Listen** button to listen to the recorded voicemail.



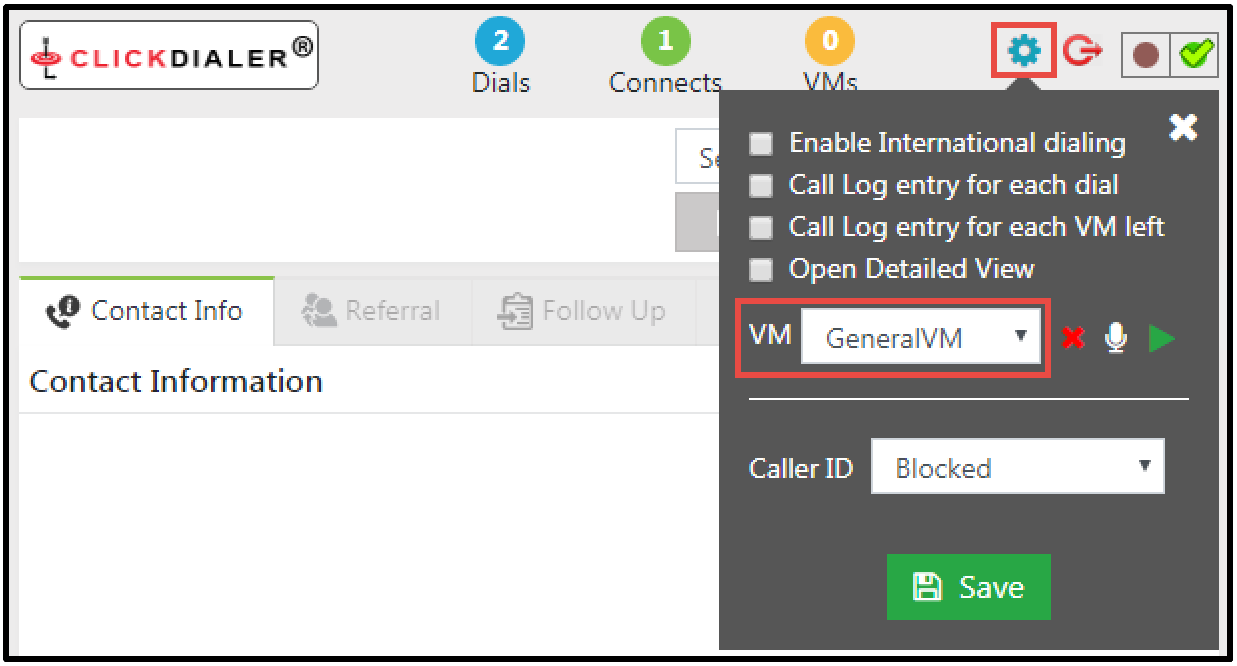
7. If you are satisfied with the current recording, click **Save** to save the recorded voicemail or click **Cancel** to record a new voicemail.

8. The newly recorded voicemail will then appear in the **VM** dropdown.

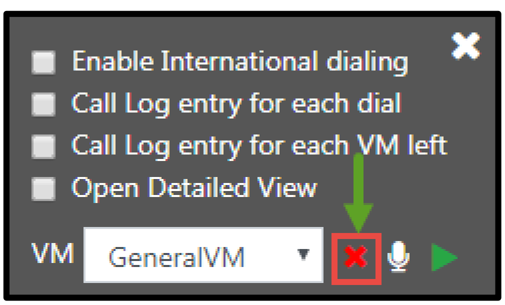


Delete a recorded Voicemail

1. Click on the **Settings** icon and select the voicemail you would like to delete from the **VM** dropdown.

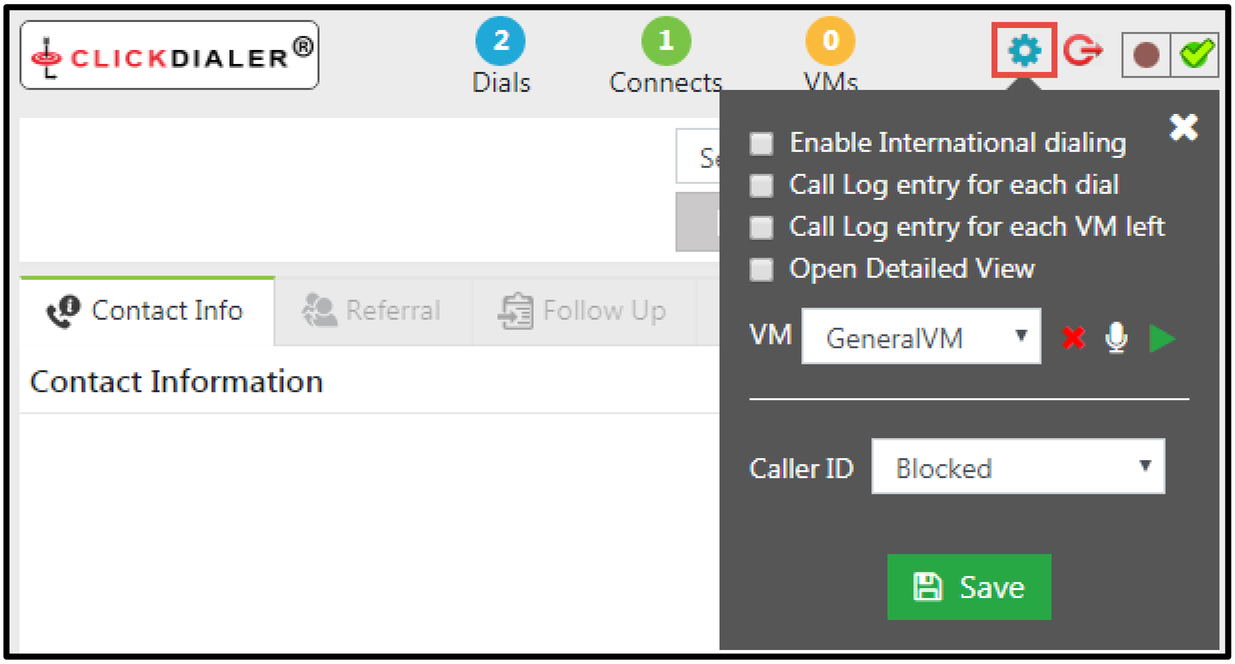


2. Click on the **Delete** icon next to the **VM** dropdown to remove the selected voicemail.

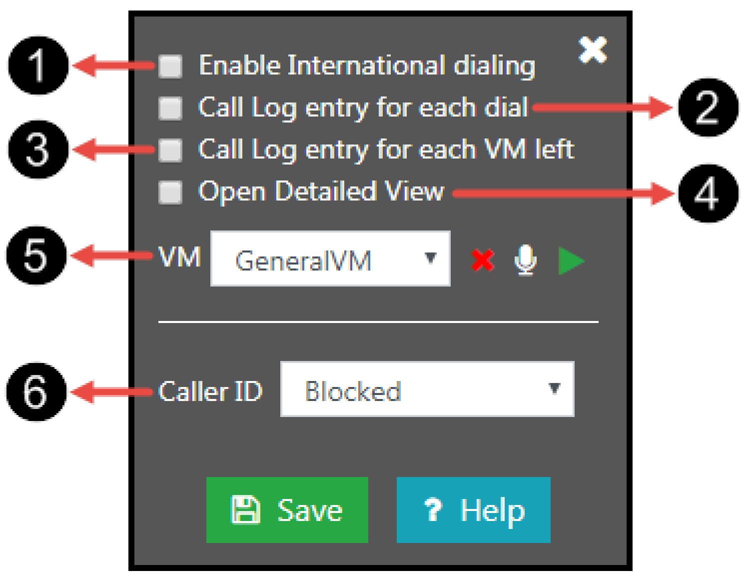


Click Dialer Settings

1. Click on the **Settings** icon to bring up the Click Dialer Settings popup window.



2. Enable the required settings from the following:



1 **Enable International dialing** – Select or deselect the checkbox to enable or disable international dialing.

NOTE: International Dialing needs to be enabled by ConnectLeader in order to dial internationally.

❷ **Call Log entry for each dial** – Select this checkbox to enable a call log entry for each call dialed. Selecting this option will create an Activity '**Dialed**' for each call, if you do not put a call disposition (call outcome). If you have this checked and then you put a call disposition in, it will overwrite the default entry '**Dialed**'.

❸ **Call Log entry for each VM left** – Select the checkbox to enable a call log entry for each voicemail left.

❹ **Open Detailed View** – Select this checkbox to display a detailed view of the contact/lead being dialed, in a separate window.

❺ **VM** – This section allows you to record a new voicemail, play back a recorded voicemail, and delete a voicemail recorded.

❻ **Caller ID** – Select the Caller ID you want to use when making calls. You will see Custom, Blocked and Area Based. If you have Custom caller IDs, you can select one or more. If you would like to have a Caller ID you own added to the Custom Caller ID section, please contact your Account Manager.

- **Blocked** – The caller ID shows as BLOCKED
- **Area Based** – Numbers based on the local area code you are calling
- **Custom** – Custom caller ID numbers, you can select one or more

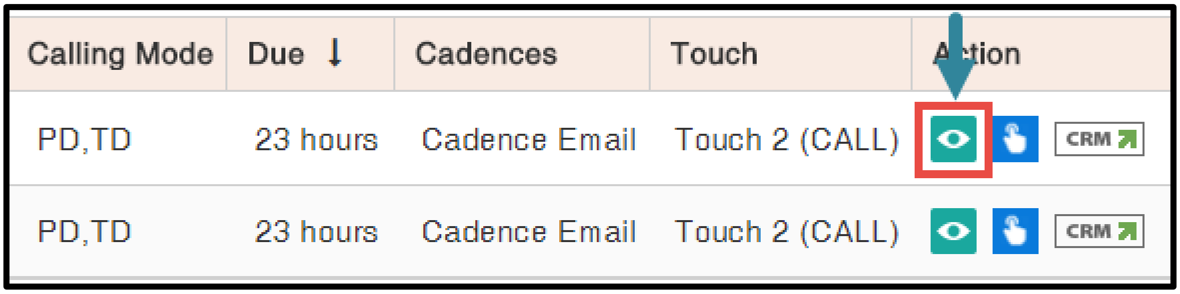
3. Click **Save** to save the settings.

Refer to the **Click Dialer - User Guide** for the detailed information on the Click Dialer features and functionalities.

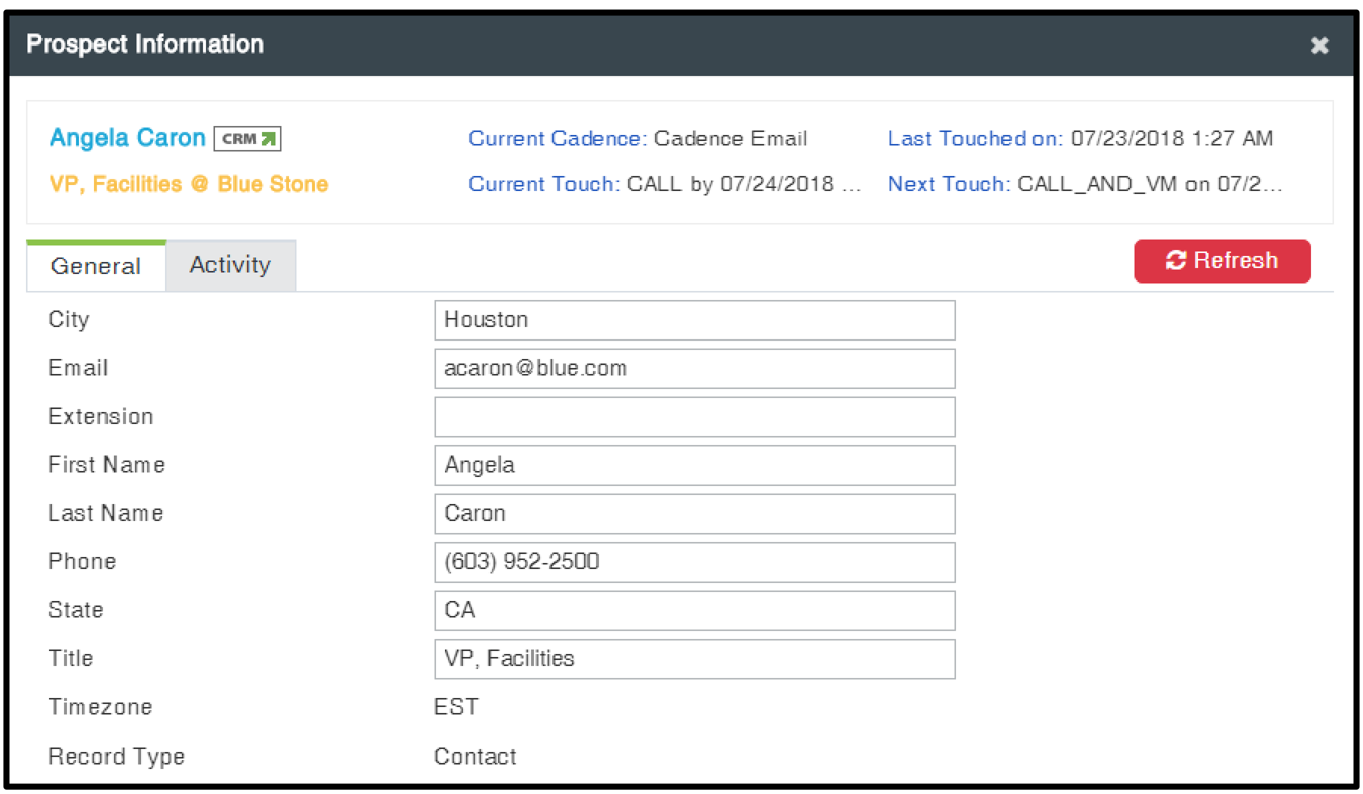
6.2 View Prospect Activities

Find the steps below to view each prospects activity:

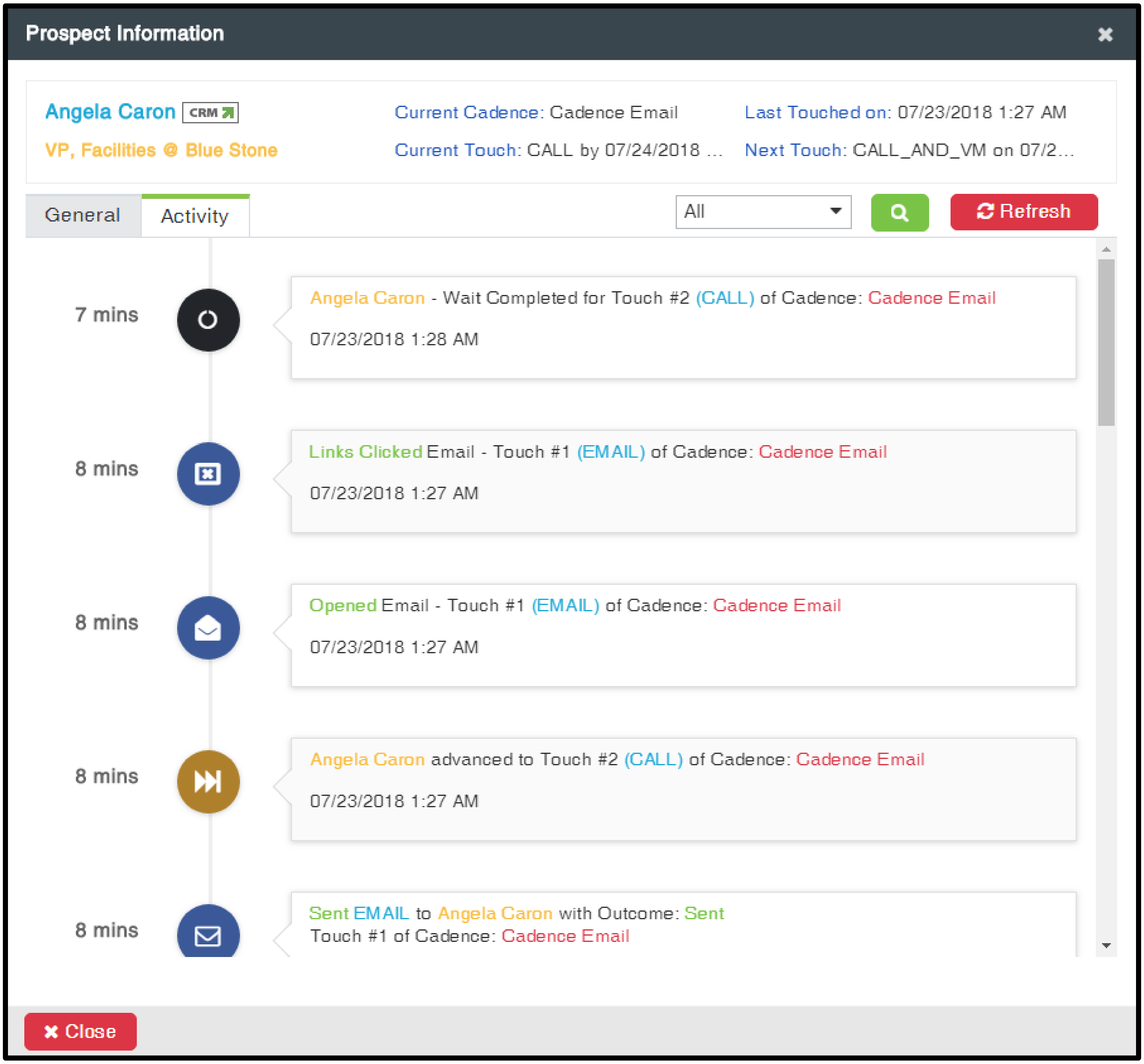
1. In the **Pending Calls** tab, click on the **View** icon to the right of the prospect you wish to view.



2. The **Prospect Information** window will be displayed, here you can find the prospect's information and the activities performed, in detail.

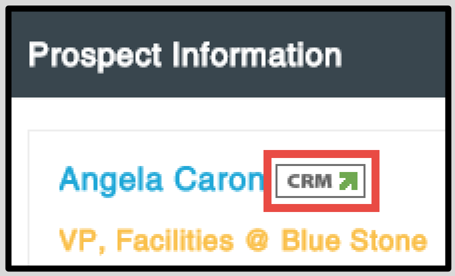


3. Click on the **Activity** tab of **Prospect Information** window to view the activities performed on the prospect.


Prospect Information
Angela Caron CRM
VP, Facilities @ Blue Stone
Current Cadence: Cadence Email
Current Touch: CALL by 07/24/2018 ...
Last Touched on: 07/23/2018 1:27 AM
Next Touch: CALL_AND_VM on 07/2...
General
Activity
All
Refresh
7 mins
Angela Caron - Wait Completed for Touch #2 (CALL) of Cadence: Cadence Email
07/23/2018 1:28 AM
8 mins
Links Clicked Email - Touch #1 (EMAIL) of Cadence: Cadence Email
07/23/2018 1:27 AM
8 mins
Opened Email - Touch #1 (EMAIL) of Cadence: Cadence Email
07/23/2018 1:27 AM
8 mins
Angela Caron advanced to Touch #2 (CALL) of Cadence: Cadence Email
07/23/2018 1:27 AM
8 mins
Sent EMAIL to Angela Caron with Outcome: Sent
Touch #1 of Cadence: Cadence Email
Close

IMPORTANT NOTE FOR CRM USERS

To view the prospect information in the CRM, click on the CRM icon on the top-left (next to the prospect name) of the **Prospect Information** window.

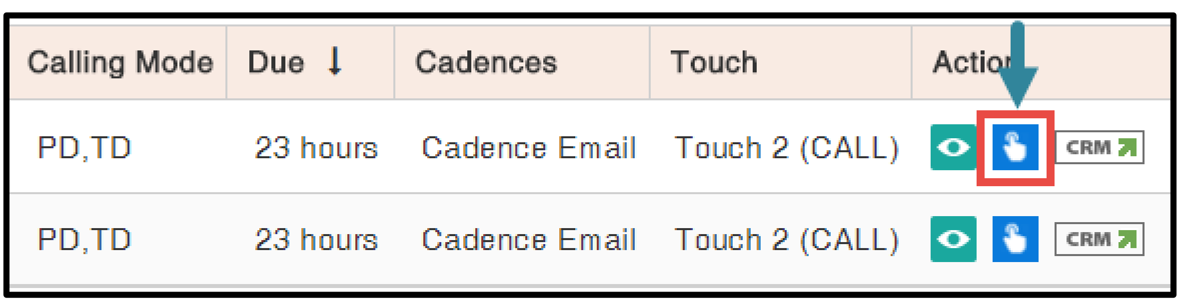


The CRM window with the prospect information will be displayed as shown in the Open CRM Window (only for CRM users) section. You can edit the prospect information by clicking the **Edit** button.

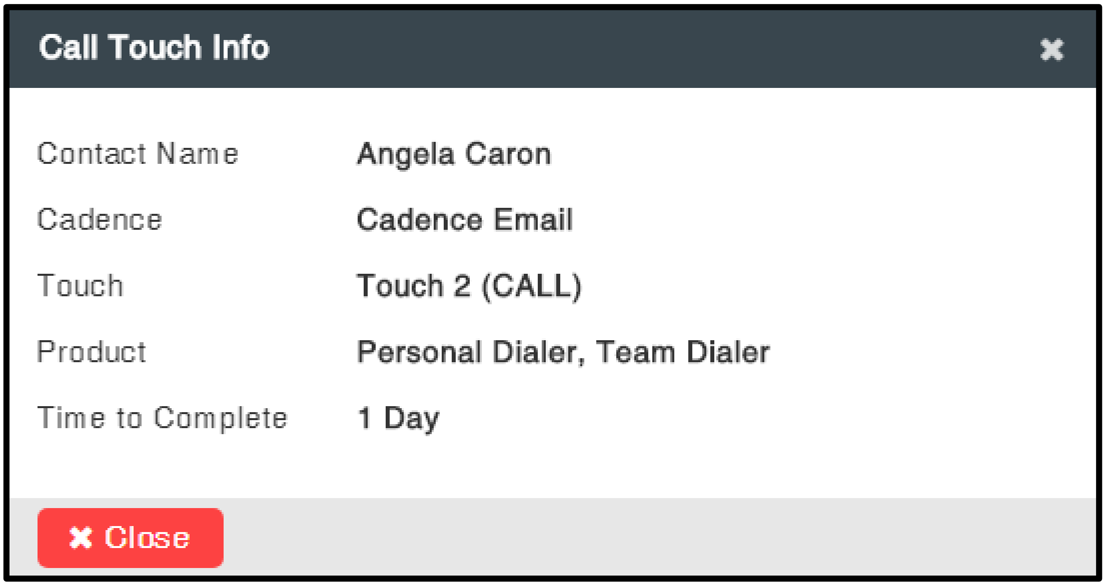
6.3 View Touch info

Find the steps below to view the touch info of a prospect:

1. In the **Pending Calls** tab, click on the **Touch Info** icon to the right of the prospect you wish to view.



2. The **Call Touch Info** popup window will be displayed with the touch information, as shown below:

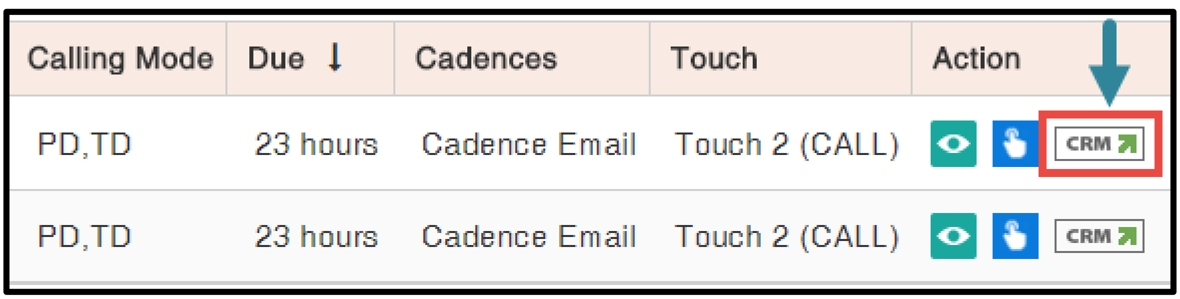


6.4 Open CRM Window (only for CRM users)

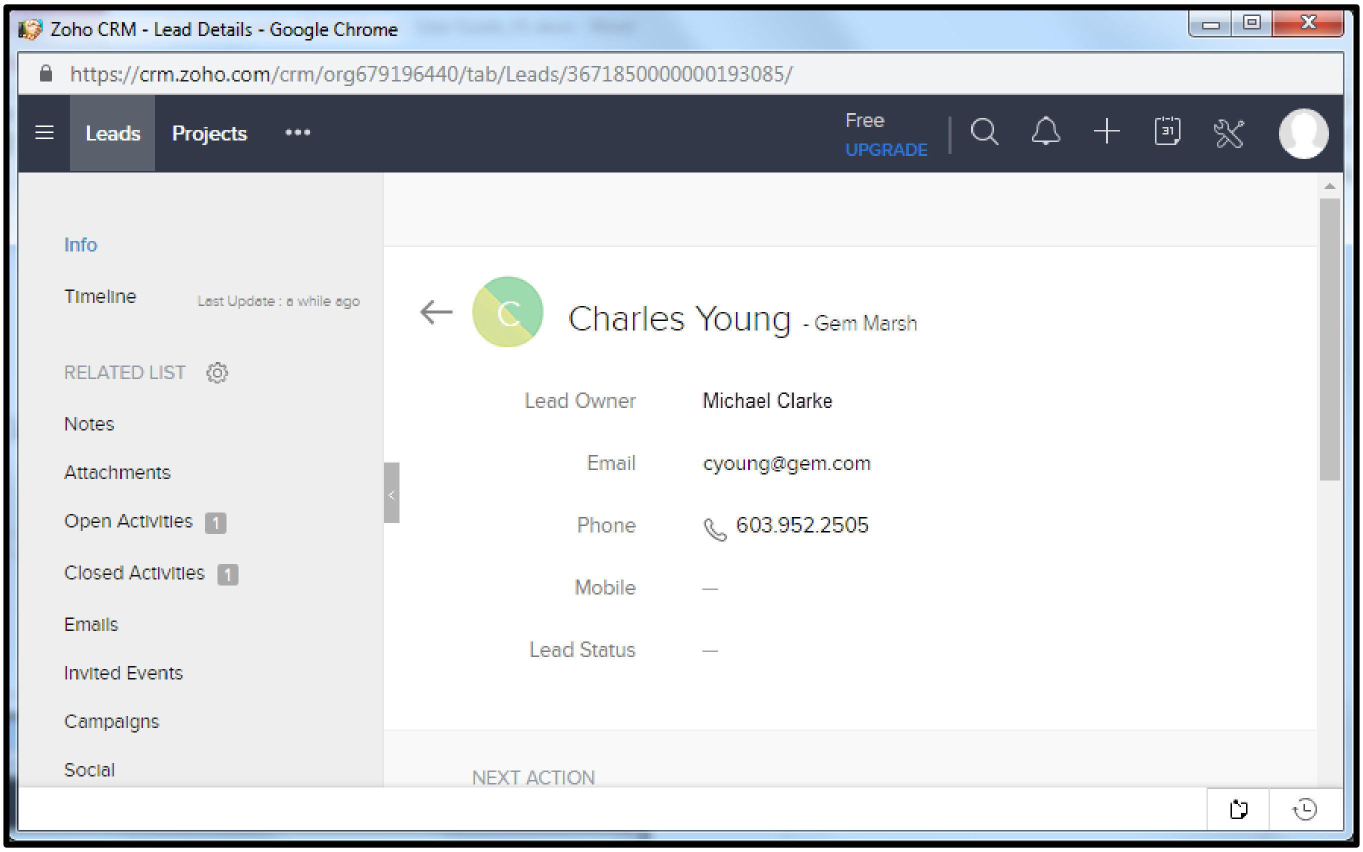
In the **Pending Calls** tab, you can view and update the prospect's information directly in the CRM.

Find the steps below to view the prospect information from the CRM:

1. In the **Pending Calls** tab, click on the **CRM** button CRM to the right of the prospect you wish to view.



2. The CRM window with the prospect's information will be displayed. If needed, you can edit the prospect information by clicking the **Edit** button.

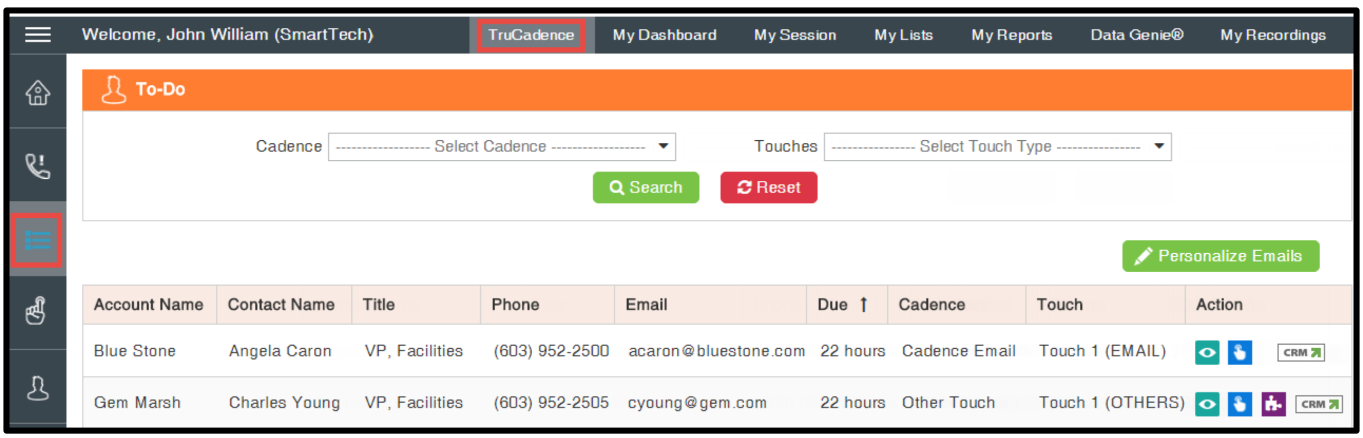


Chapter 7 – To-Do Tab

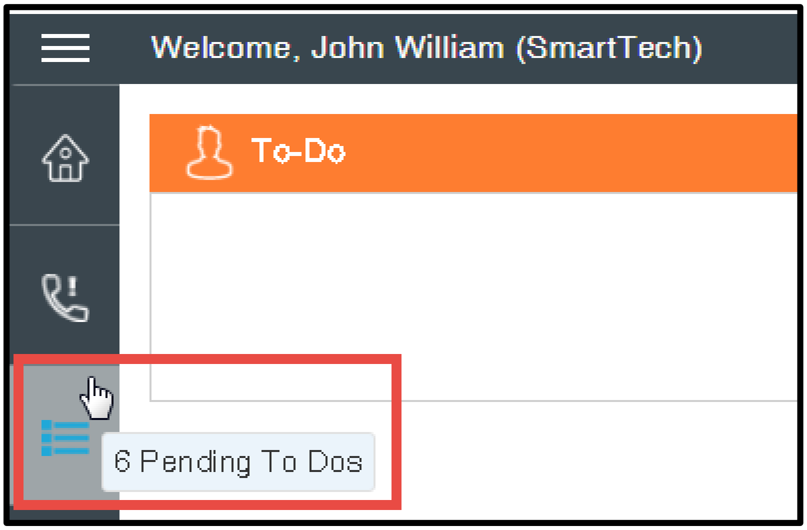
This chapter covers the following topics:

In the **To-Do** tab, users will find all pending emails, which have to be sent manually (after being previewed). In addition, prospects assigned with '**Other Touch**' in a Cadence will be displayed here for manual execution to the respective **Social Network** selected.

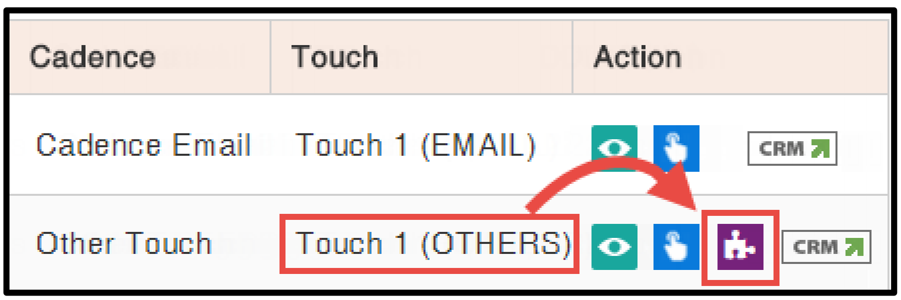
Navigation	TruCadence ► To-Do tab



The **To-Do** icon in the left menu pane will glow in **Blue** to easily identify there are pending emails & other touch.



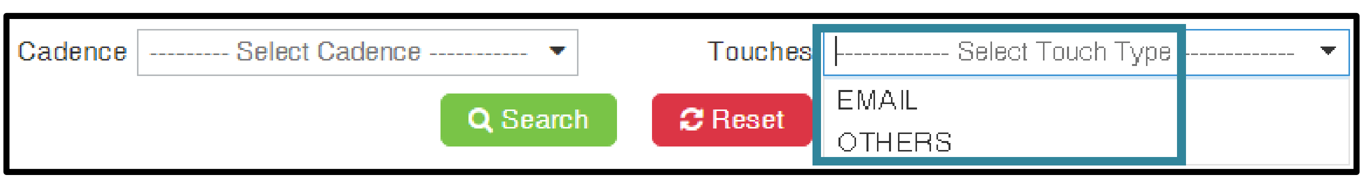
The **Other Touch** icon  will only be displayed for the prospects assigned with '**Other Touch**' as shown below:



You can filter **Email** and **Other** touches using the filter '**Touches**'.

Find the steps below to filter and view the required touches for execution:

1. In the **To-Do** tab, select the required touch you wish to complete from the **Touches** dropdown, for example; **EMAIL**.



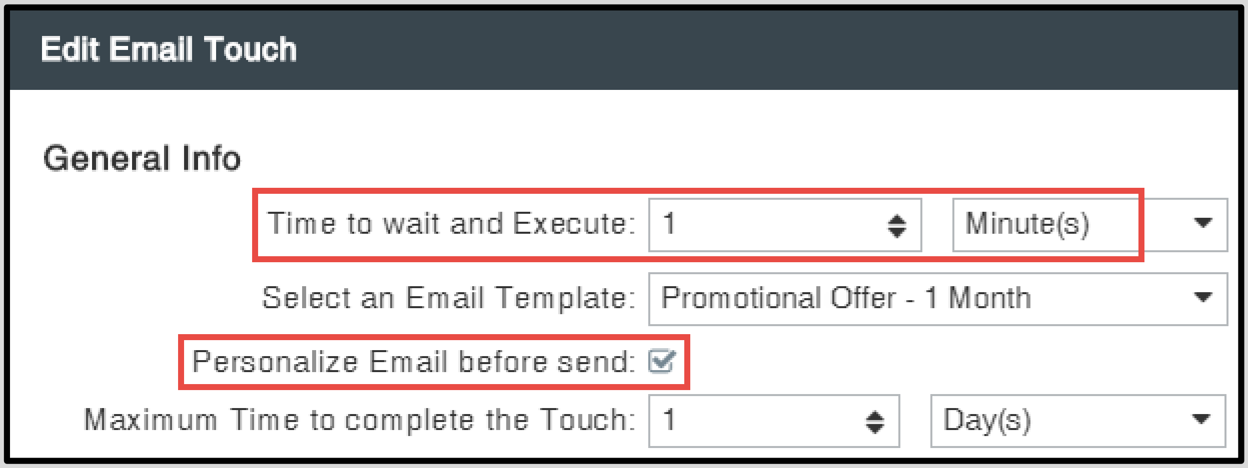
2. Click on the **Search** button to filter and display the records of the respective touch, example: all the pending emails will be displayed.

7.1 Preview & Send Pending Emails

IMPORTANT NOTE

Emails will be logged in the To-Do tab for preview:

- only if **Personalize Email before send** option is enabled in the **Email Touch** window
- only after the time specified in the **Time to wait and Execute** field of **Email Touch** window



If the emails remain untouched until the time specified in the **Maximum Time to complete the touch** field of **Email Touch** window, then the emails will expire & be removed from the To-Do tab and will fall under the outcome – '**Fall Through**'. When a prospect falls through, they will be moved to the next touch.

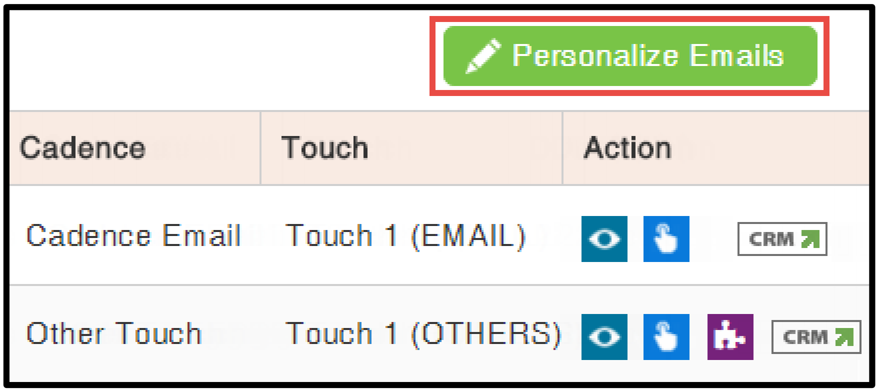
Refer to the Email Touch section for further information.

Find the steps below to preview & send emails manually:

1. In the **To-Do** tab, you can either preview & send emails one after another or you can filter the emails by a **Cadence** and/or **Touche**.

   Preview and Send all Emails

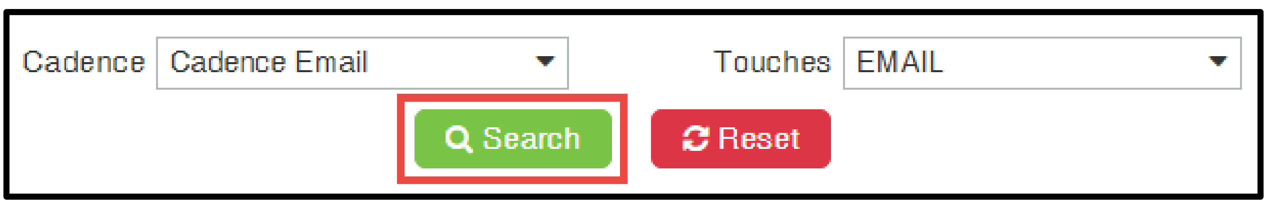
   a. Click on the **Personalize Emails** button to preview & send emails manually one after another.



Filter and Send Emails

a. Select a Cadence from the **Cadence** dropdown

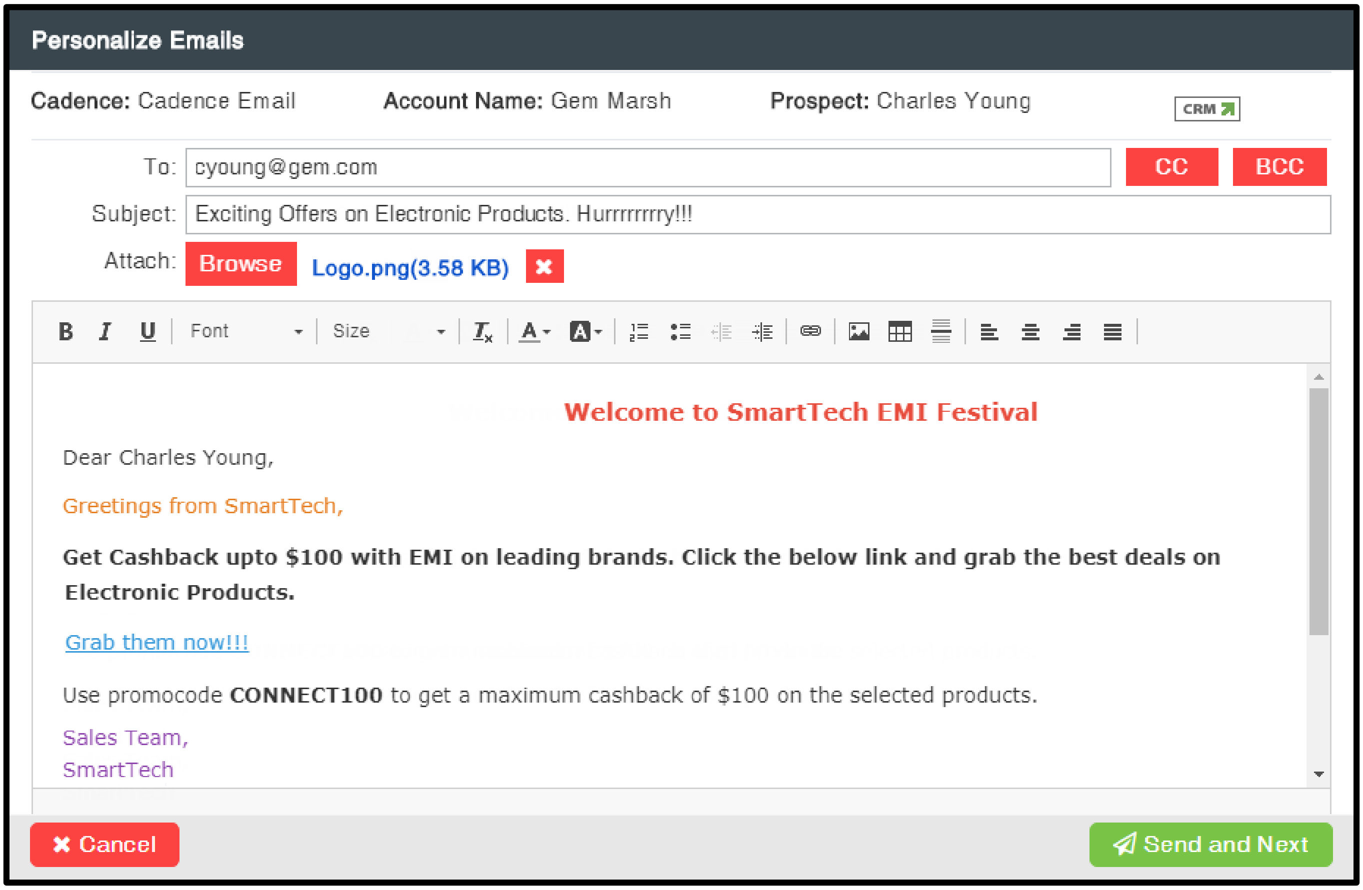
b. To filter further, select the touch **Email** from the **Touches** dropdown to list **only** the pending emails.



c. Click **Search** to filter and view only the prospects assigned with **Email Touch**.

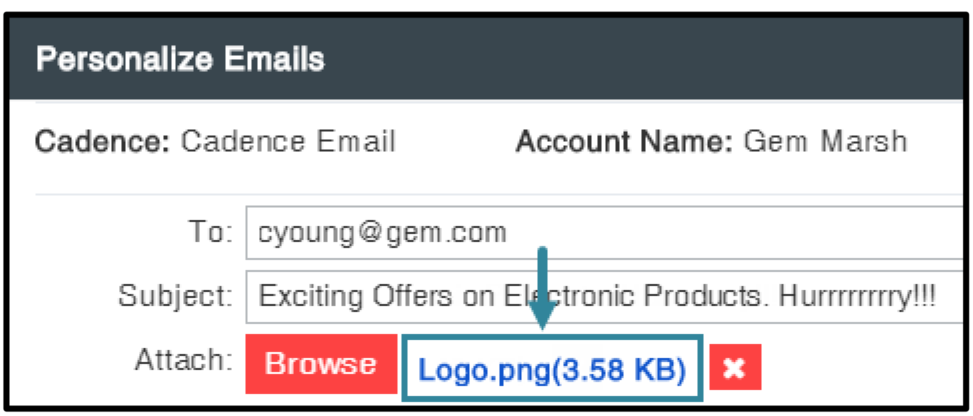
d. Now, click on the **Personalize Emails** button to preview & send emails manually one after another.

2. The **Personalize Emails** window will be displayed, here you can edit the email information and add attachments (if needed).



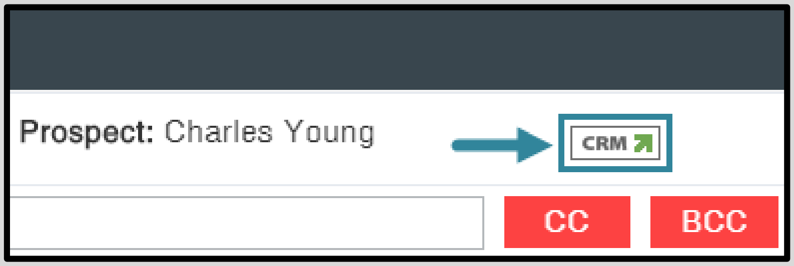
To add an attachment, click on the **Browse** button to browse and select an attachment from your computer that has to be sent to the prospect.

The attachment can be viewed, by clicking on the attachment to the right of the **Browse** button, as shown below:



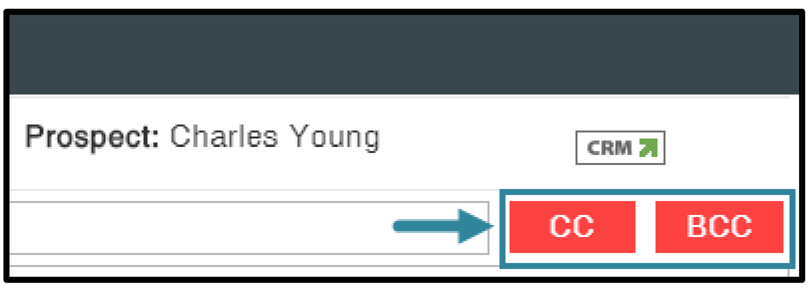
IMPORTANT NOTE

- From the **Personalize Emails** window, you can view and update a prospect's information directly in the CRM by clicking the **CRM** button  on the top-right corner.

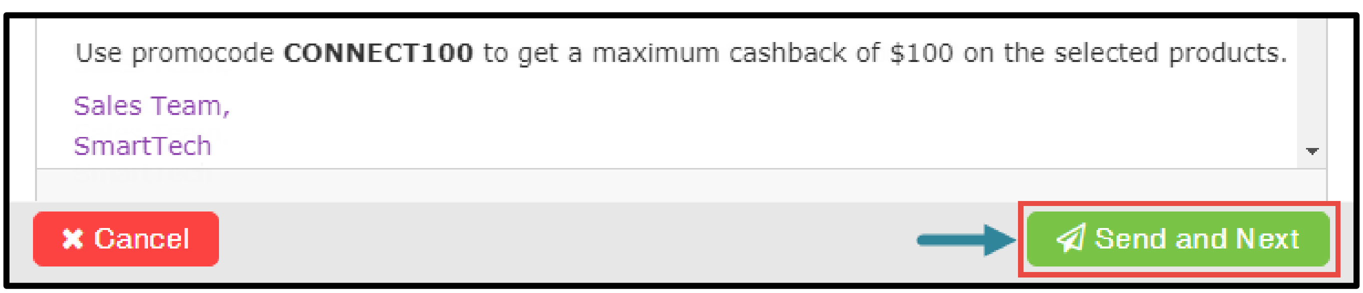


The CRM button will be displayed. Refer to the [Open CRM Window (only for CRM users)] section for detailed information

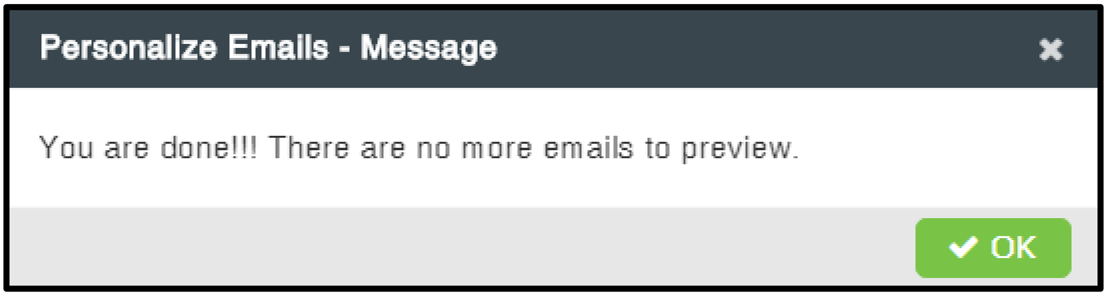
3. You can use the **CC** and/or **BCC** option to send a copy of the email to someone other than the prospect by clicking the respective buttons to the right of the **To** field.



4. Click on the **Send and Next** button to preview and send further emails one after another or click **Cancel** to cancel the process.

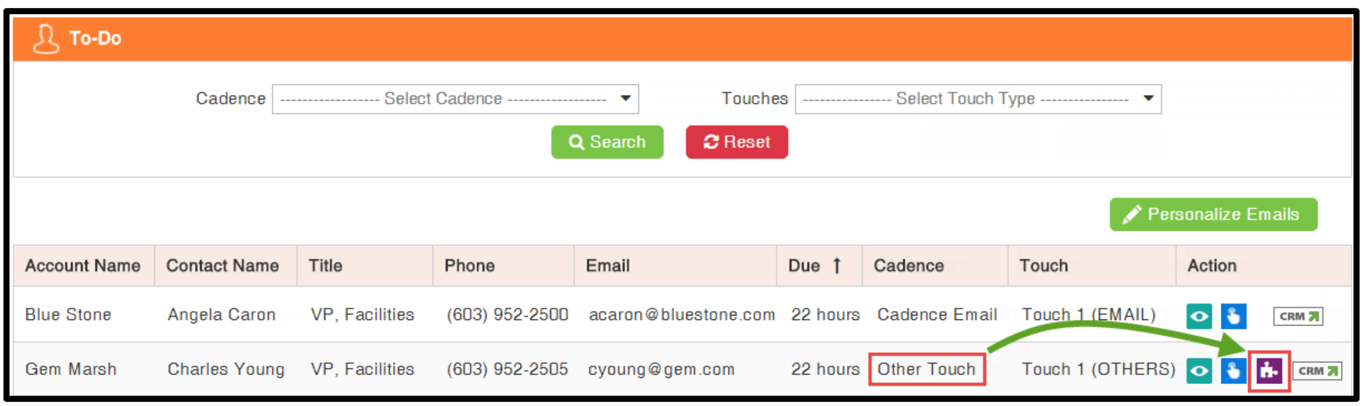


5. Once you have completed sending all pending emails, the message box below will be displayed. Click **OK**.



7.2 Execute Other Touch

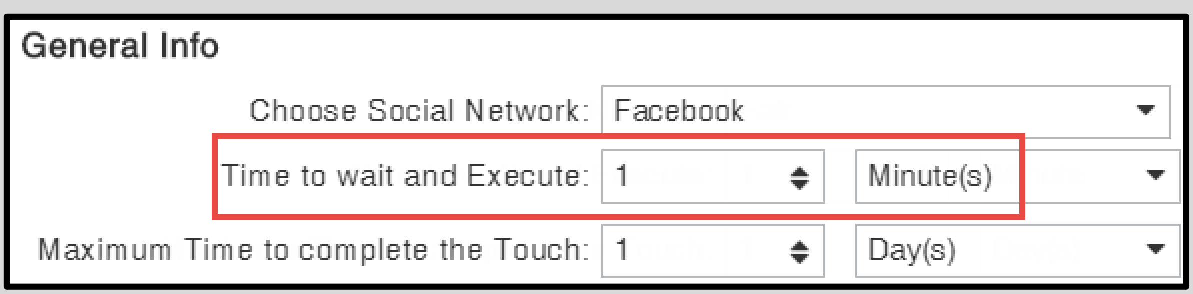
Prospects assigned to '**Other Touch**' will be displayed in the To-Do tab for manual execution to the respective **Social Network** (Facebook/Twitter/Instagram) selected.



IMPORTANT NOTE

Prospects assigned to **Other Touch** will be logged in the To-Do tab for execution:

- only after the time specified in the **Time to wait and Execute** field of the **Other Touch** window

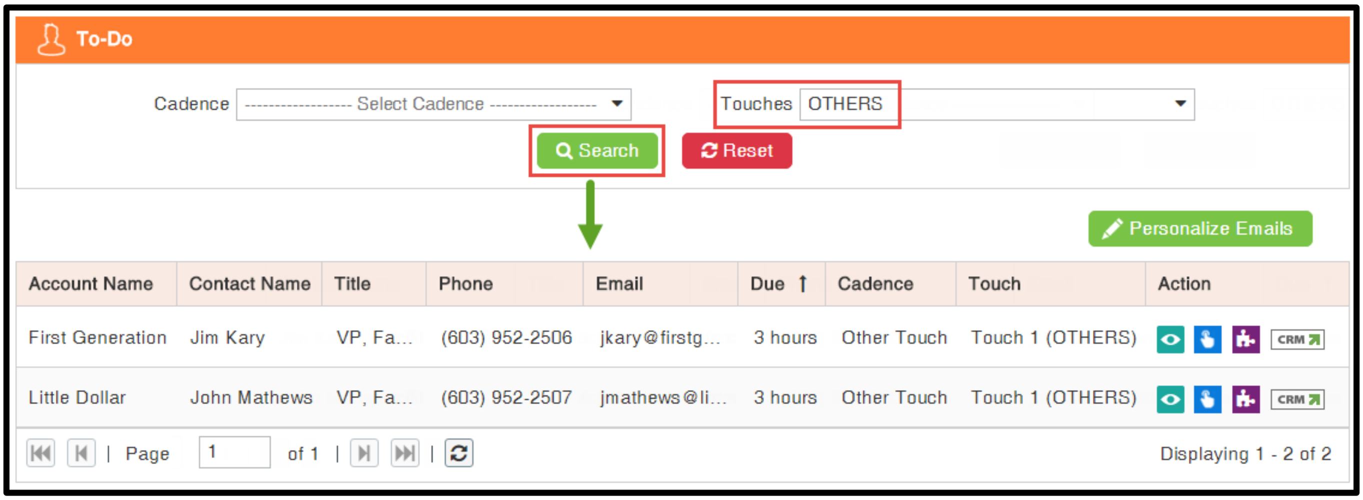


If the records remain untouched until the time specified in the **Maximum Time to complete the Touch** field of the **Other Touch** window, then the records will expire & be removed from the **To-Do** tab and will fall under the outcome – '**Fall Through**'. When a prospect falls through, they will be moved to the next touch.

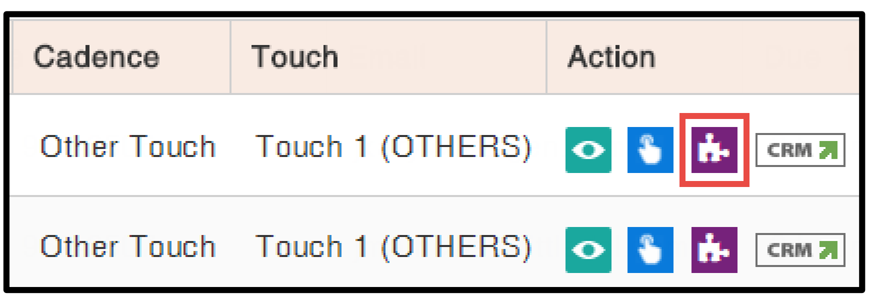
Refer to the [Other Touch] section for further information.

Find the steps below to execute the Other Touch manually:

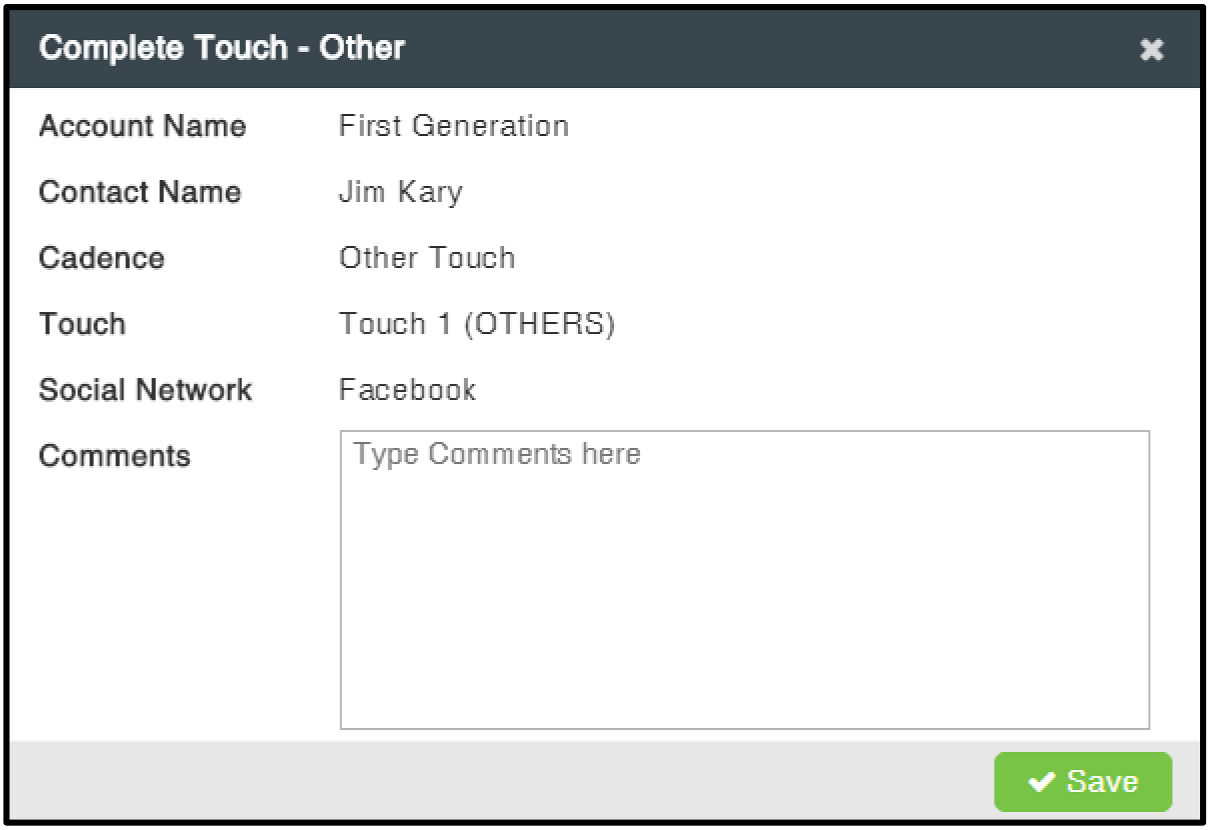
1. In the **To-Do** tab, search and filter the **Other touch** records using the **Touches** filter.



2. Click on the **Complete Other Touch** icon  to the right of the prospect you wish to execute.

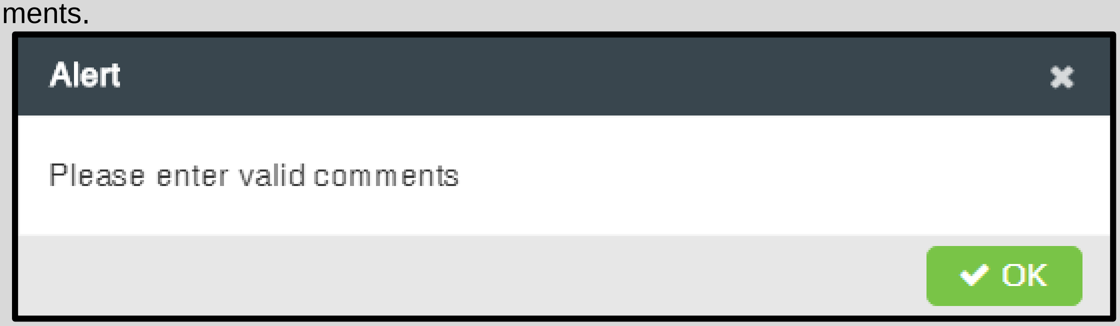


3. The **Complete Touch - Other** window will be displayed. Enter the information in the **Comments** field.



IMPORTANT NOTE

The following Alert message will be displayed when clicking Save button without entering valid Comments.

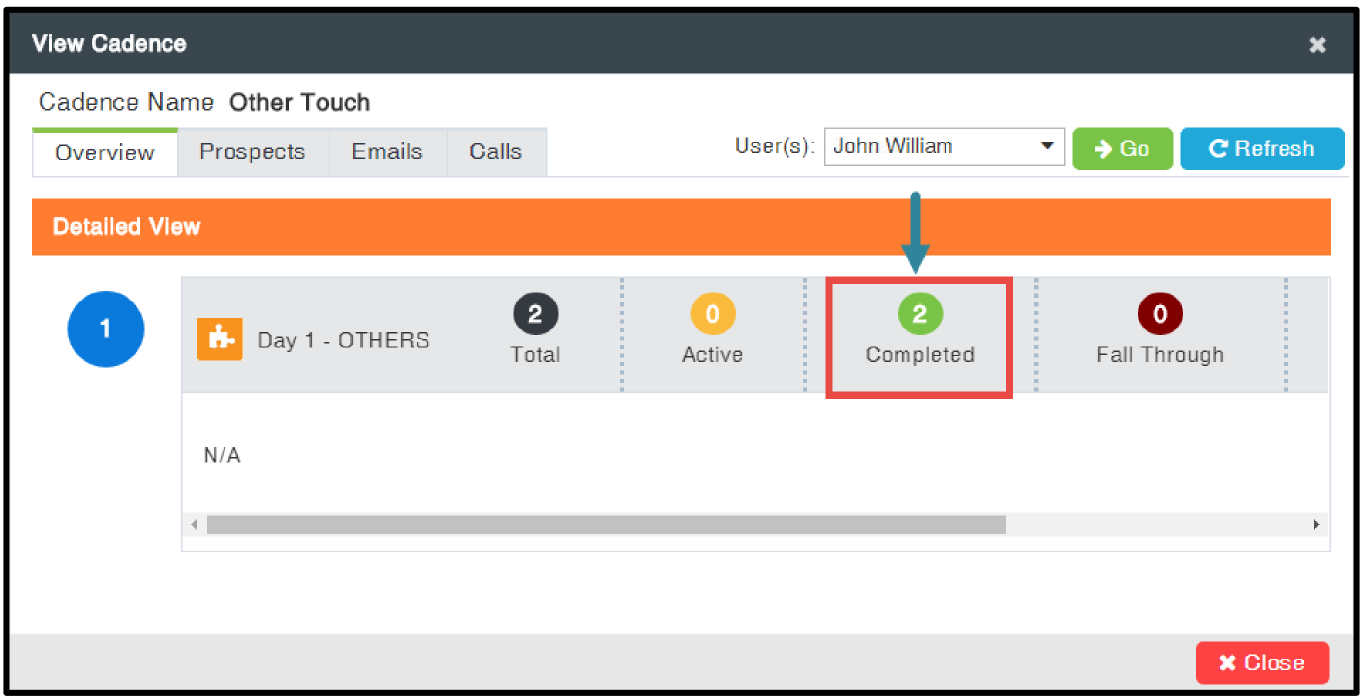


4. Click **Save** to save the information or click the **Close** icon to cancel the process and close the window.

After successful completion, the message box below will be displayed. Click **OK**.

5. The metrics for the **Other Touch** will be updated in the **View Cadence** popup window of the respective Cadence.

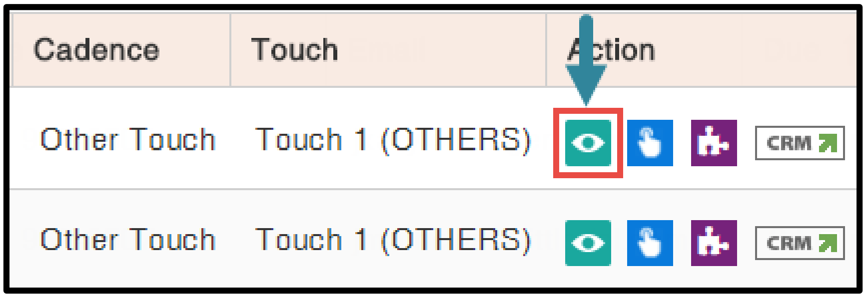
TruCadence ► **Cadences** ► **View Cadence** ► **Overview** tab ► **Detailed View** section



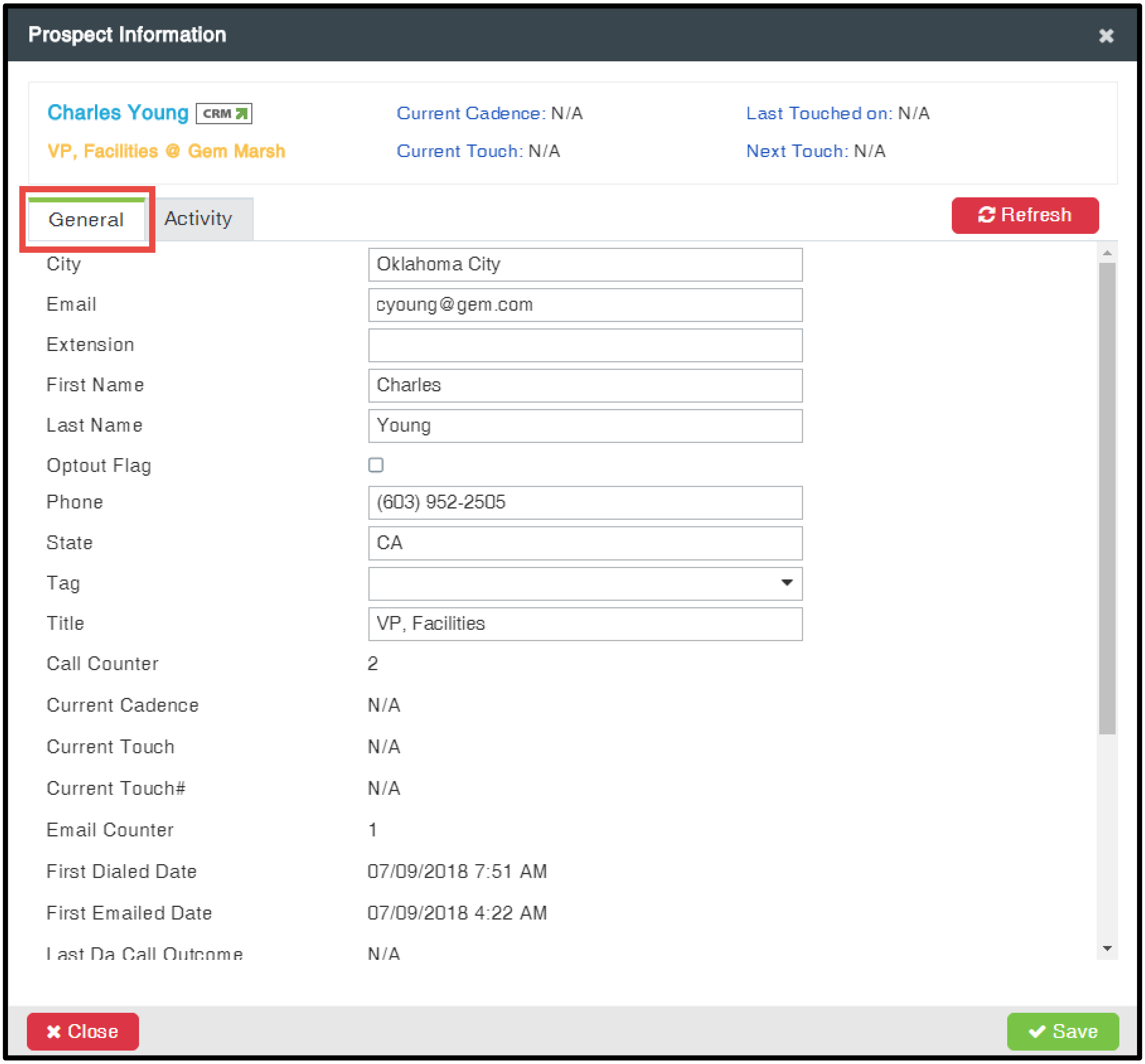
7.3 View Prospect Activities

Find the steps below to view each prospects activity:

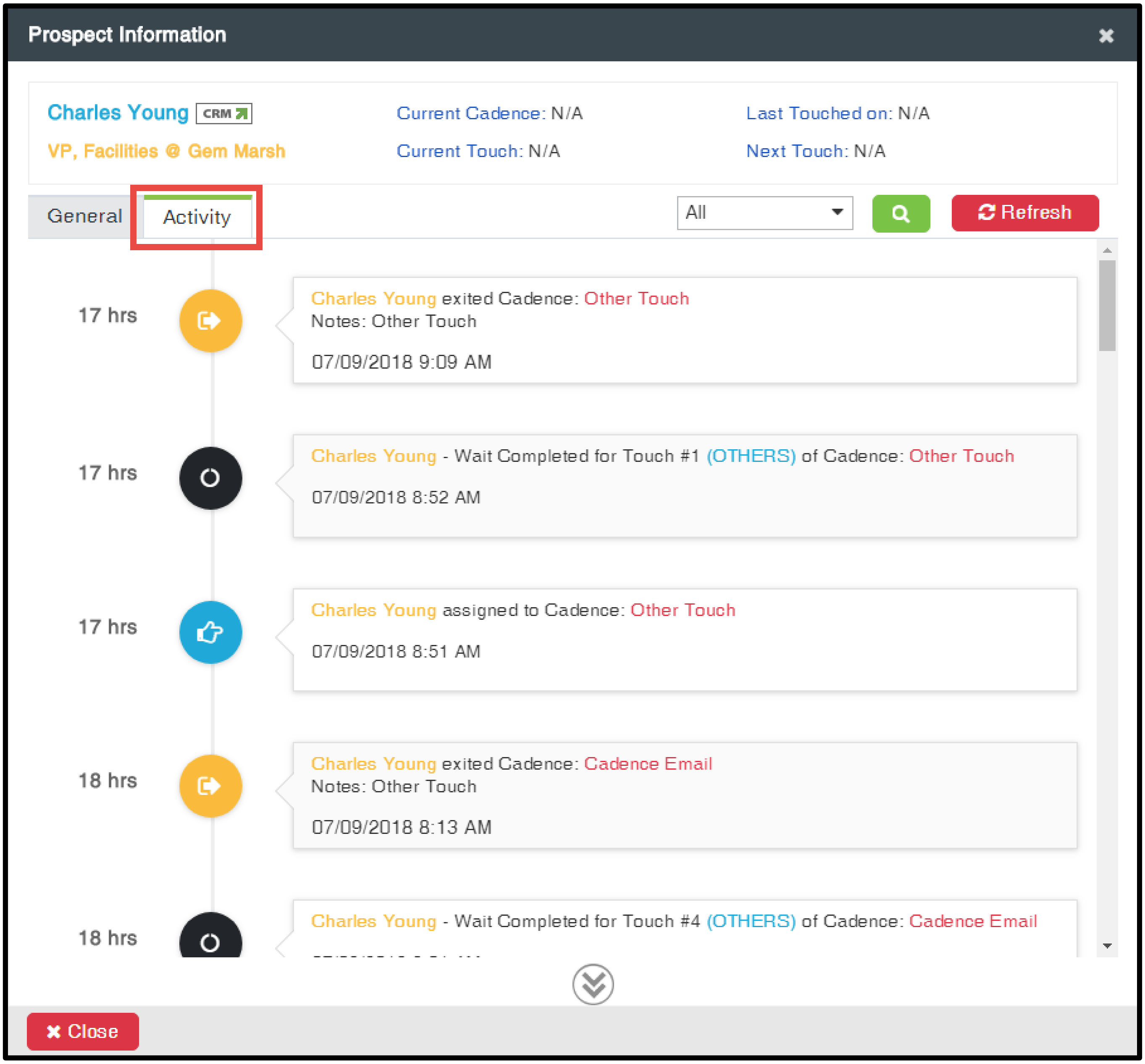
1. In the **To-Do** tab, click on the **View** icon to the right of the prospect you wish to view.



2. The **Prospect Information** window will be displayed; here you can find the prospect information and the activities performed in detail. If needed, you can edit the details and click **Save** to save the details.

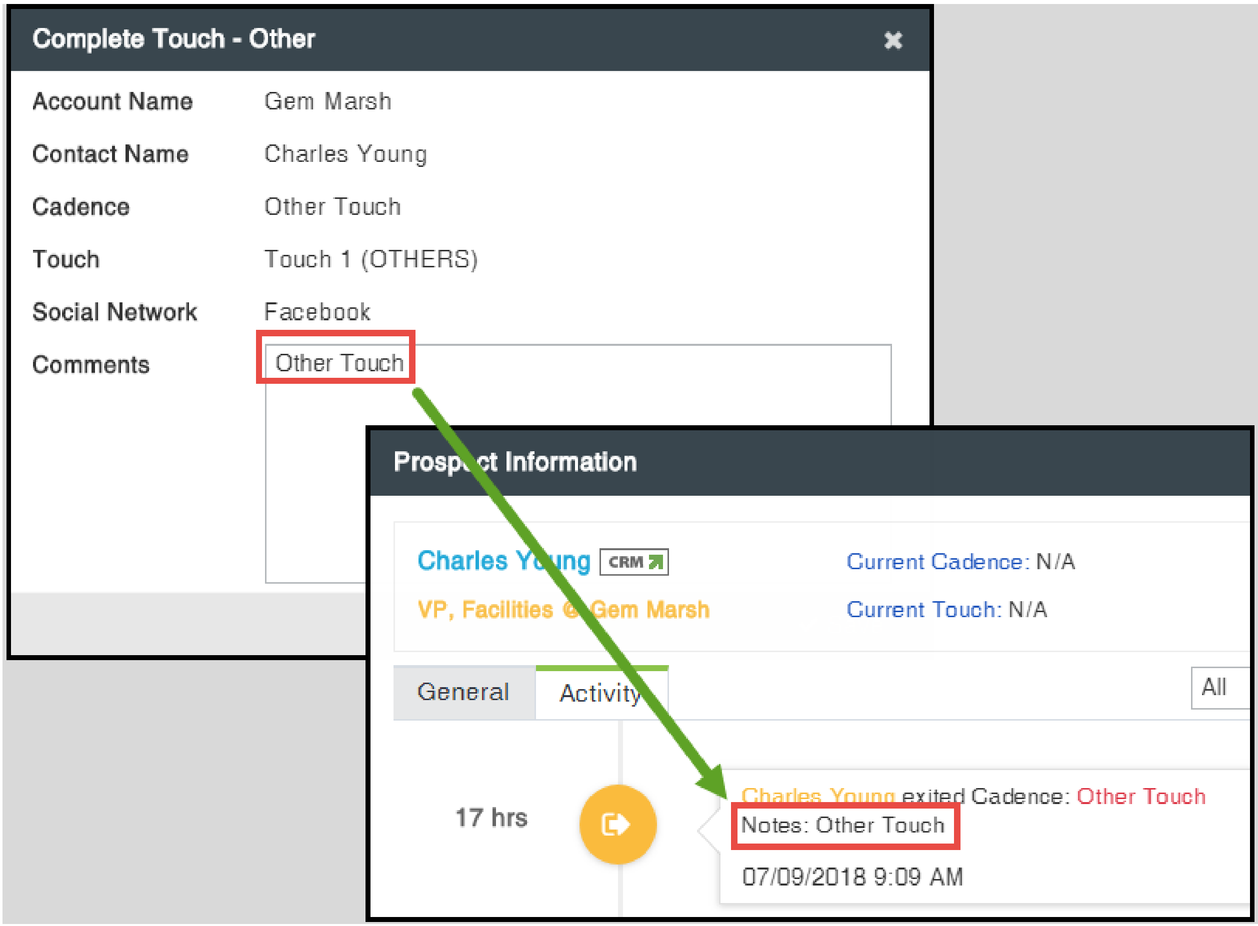


3. Click on the **Activity** tab of **Prospect Information** window to view the activities performed on the prospect.



IMPORTANT NOTE

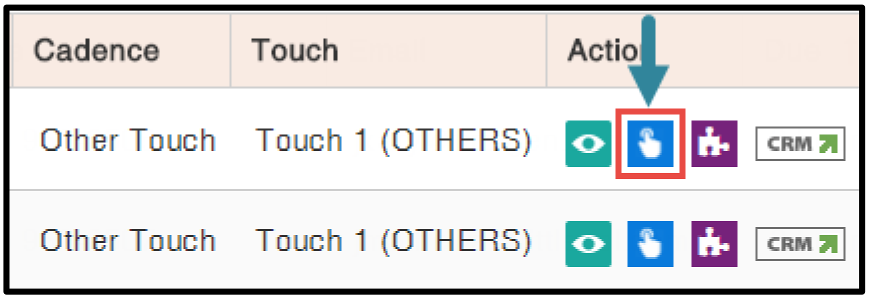
Information provided in the '**Comments**' field of **Complete Touch - Other** window will be displayed in the **Activity** tab, as shown below:


Complete Touch - Other
Account Name Gem Marsh
Contact Name Charles Young
Cadence Other Touch
Touch Touch 1 (OTHERS)
Social Network Facebook
Comments Other Touch
Prospect Information
Charles Young CRM
VP, Facilities @ Gem Marsh
Current Cadence: N/A
Current Touch: N/A
General
Activity
All
17 hrs
Charles Young exited Cadence: Other Touch
Notes: Other Touch
07/09/2018 9:09 AM

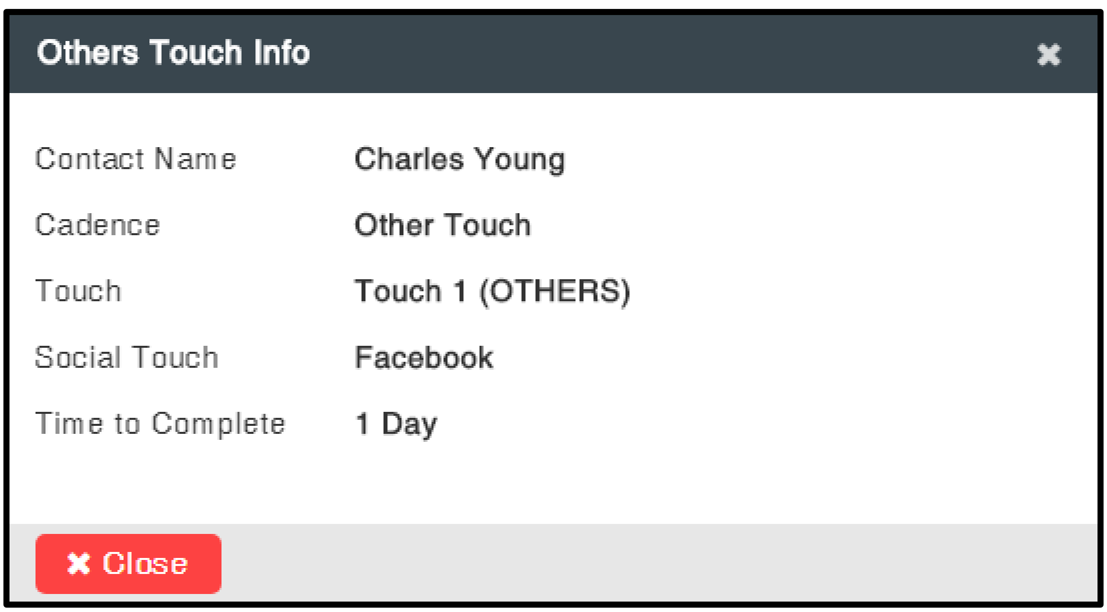
7.4 View Touch Info

Find the steps below to view the touch info of a prospect:

1. In the **To-Do** tab, click on the **View Touch Info** icon to the right of the prospect you wish to view.



2. The **Touch Info** popup window will be displayed with the touch information, as shown below:

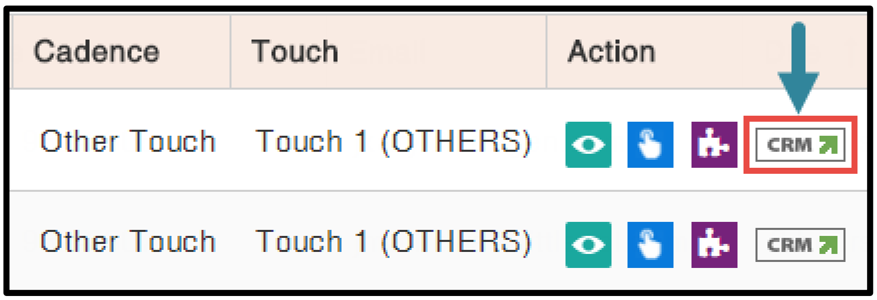


7.5 Open CRM Window (only for CRM users)

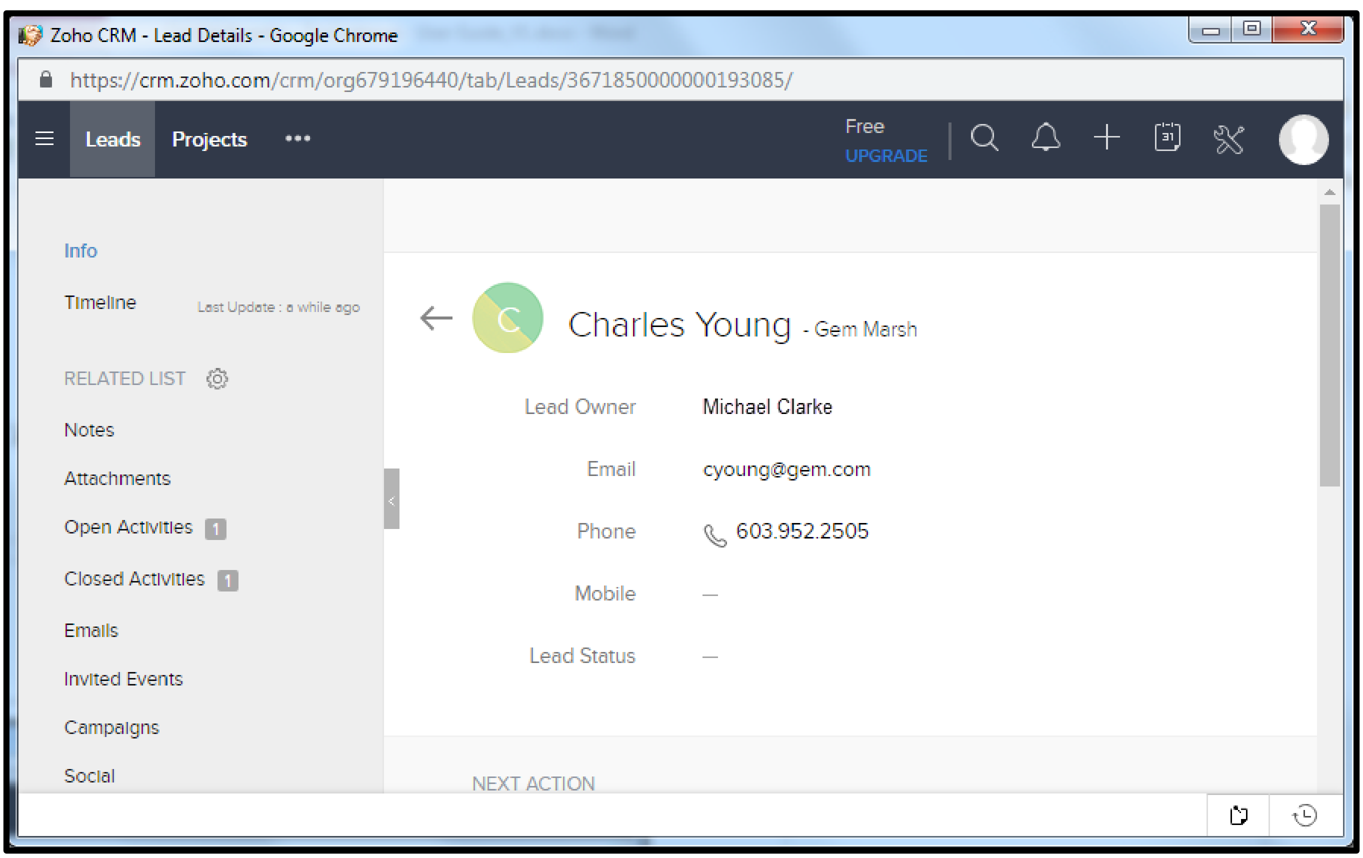
In the **To-Do** tab, you can view and update the prospect's information directly into the CRM.

Find the steps below to view the prospect information from the CRM:

1. In the **To-Do** tab, click on the **CRM** button CRM to the right of the prospect you wish to view.



2. The CRM window, with the prospect's information will be displayed. If needed, you can edit the prospect information by clicking the **Edit** button.



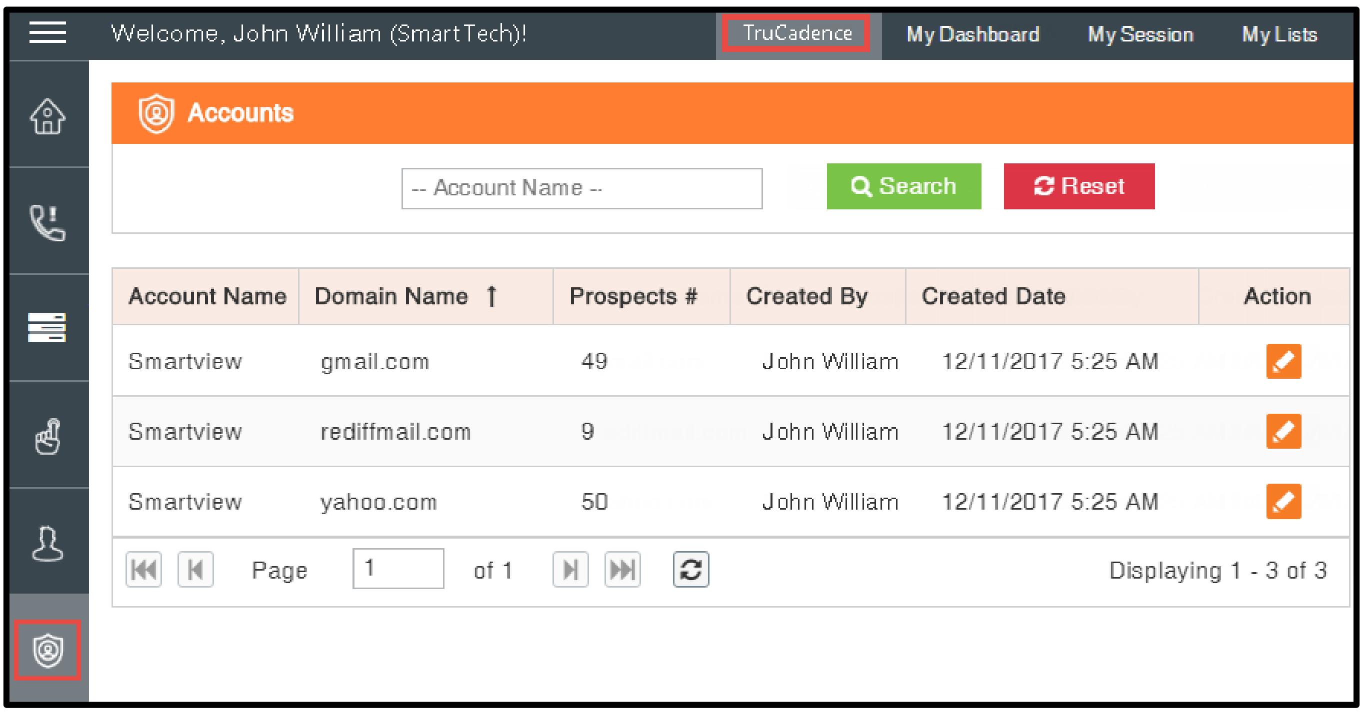
Chapter 8 – Accounts Tab

This chapter covers the following topics:

- Delete a Prospect
- View Prospect Details
- Open CRM Window (only for CRM users)

In the **Accounts** tab, prospects imported are grouped by Domain Name & Account Name; here you can see the number of prospects under each account name/domain name.

Navigation	TruCadence ▶ Accounts tab



In addition, you can view the prospect details and delete a prospect from the respective Account Name.

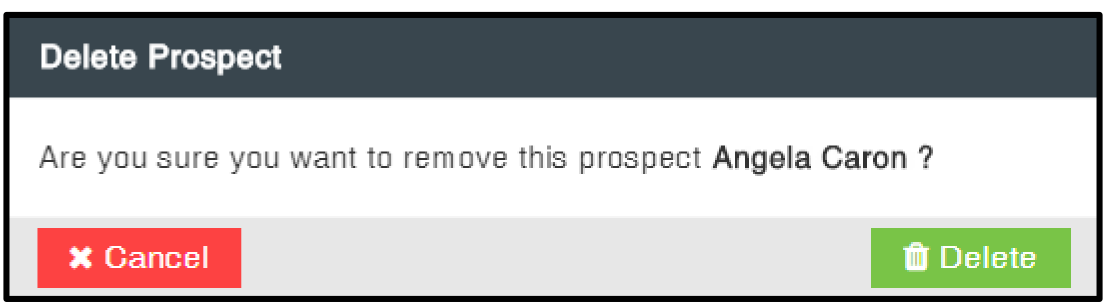
8.1 Delete a Prospect

To delete a prospect from an Account:

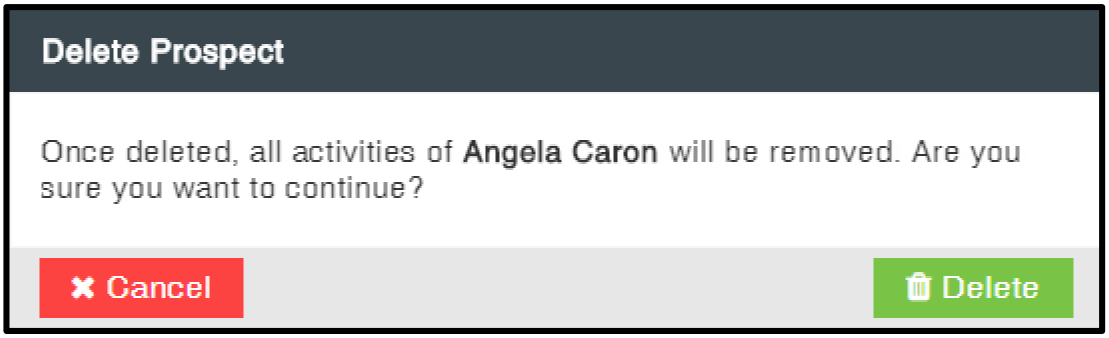
1. In the **Accounts** tab, click on the **Edit** icon to the right of the Account Name.

2. The **Account Details** window will be displayed. Under the **Prospect Info** section, click on the **Delete** icon to the right of the prospect you wish to delete.

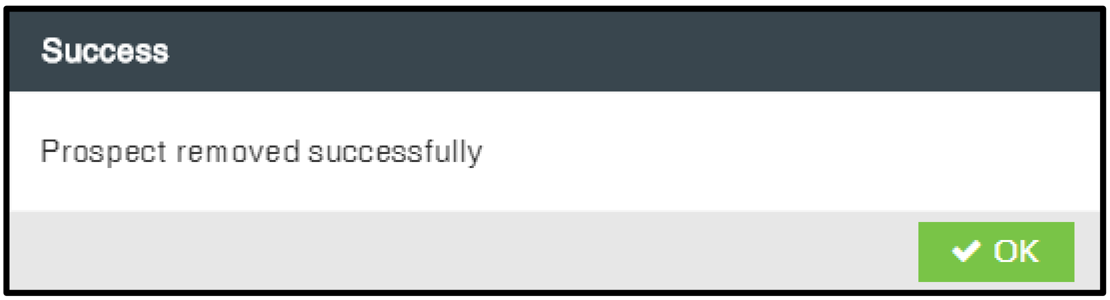
3. A confirmation message will be displayed as shown below. Click **Delete** to delete the prospect or click **Cancel** to cancel the process.



4. Again, a confirmation message will be displayed, as the record cannot be recovered once it is removed. Click **Delete** to confirm the deletion or click **Cancel** to cancel the process.



After successful deletion, the alert message shown below will be displayed. Click **OK**.



8.2 View Prospect Details

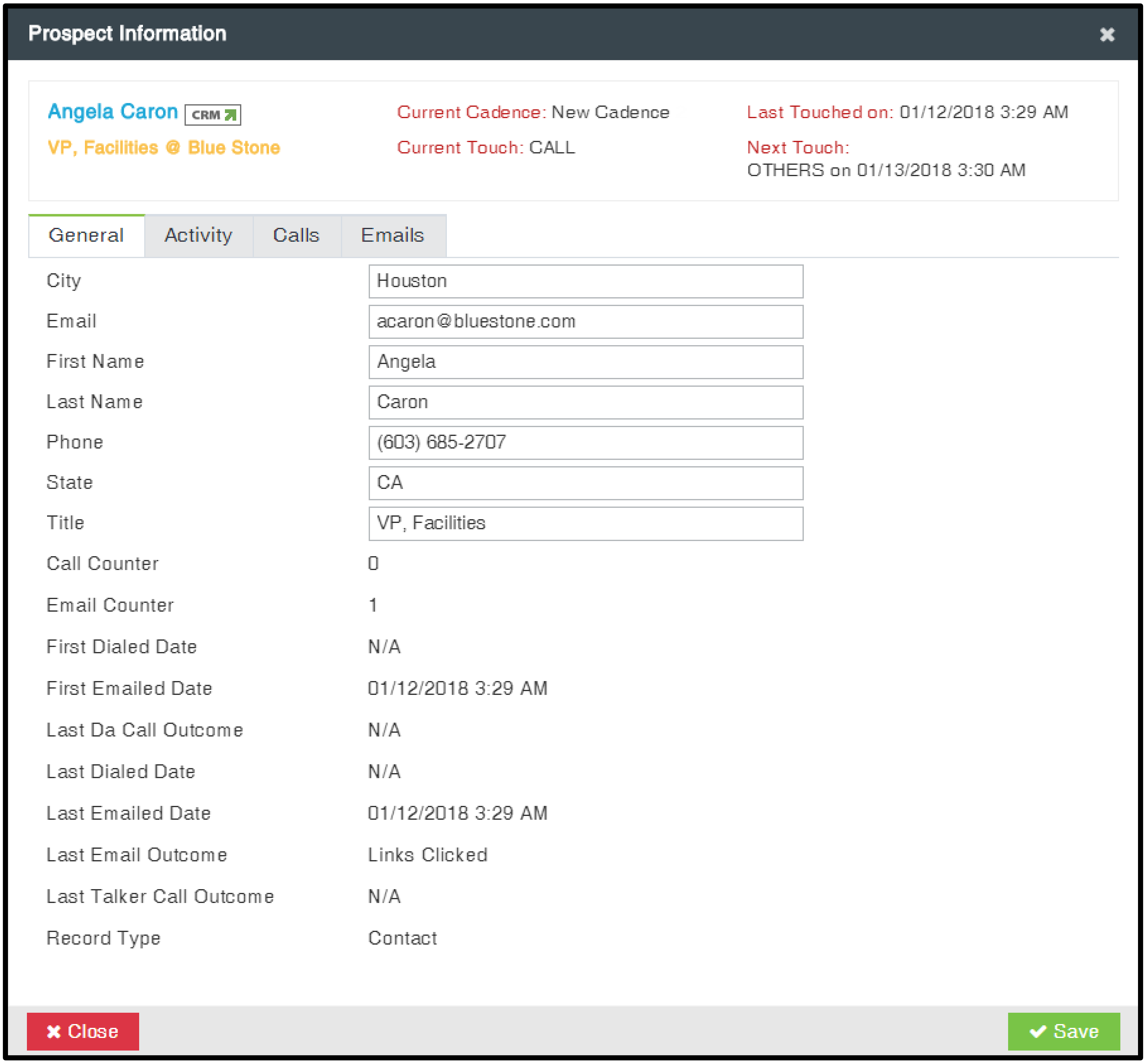
Find the steps below to view the prospect details:

1. In the **Accounts** tab, click on the **Edit** icon to the right of the Account Name.

Account Name	Domain Name ↑	Prospects #	Created By	Created Date	Action
Smartview	gmail.com	49	John William	12/11/2017 5:25 AM	
Smartview	rediffmail.com	9	John William	12/11/2017 5:25 AM	

2. The **Account Details** window will be displayed. Under the **Prospect Info** section, click on the **View** icon to the right of the prospect you wish to view.

3. The **Prospect Information** popup window will be displayed; here you can view the prospects detailed information. You can make changes as needed and click **Save** to save the changes.


Prospect Information
Angela Caron CRM
VP, Facilities @ Blue Stone
Current Cadence: New Cadence
Current Touch: CALL
Last Touched on: 01/12/2018 3:29 AM
Next Touch:
OTHERS on 01/13/2018 3:30 AM
General
Activity
Calls
Emails
City
Houston
Email
acaron@bluestone.com
First Name
Angela
Last Name
Caron
Phone
(603) 685-2707
State
CA
Title
VP, Facilities
Call Counter
0
Email Counter
1
First Dialed Date
N/A
First Emailed Date
01/12/2018 3:29 AM
Last Da Call Outcome
N/A
Last Dialed Date
N/A
Last Emailed Date
01/12/2018 3:29 AM
Last Email Outcome
Links Clicked
Last Talker Call Outcome
N/A
Record Type
Contact
Close
Save

8.3 Open CRM Window

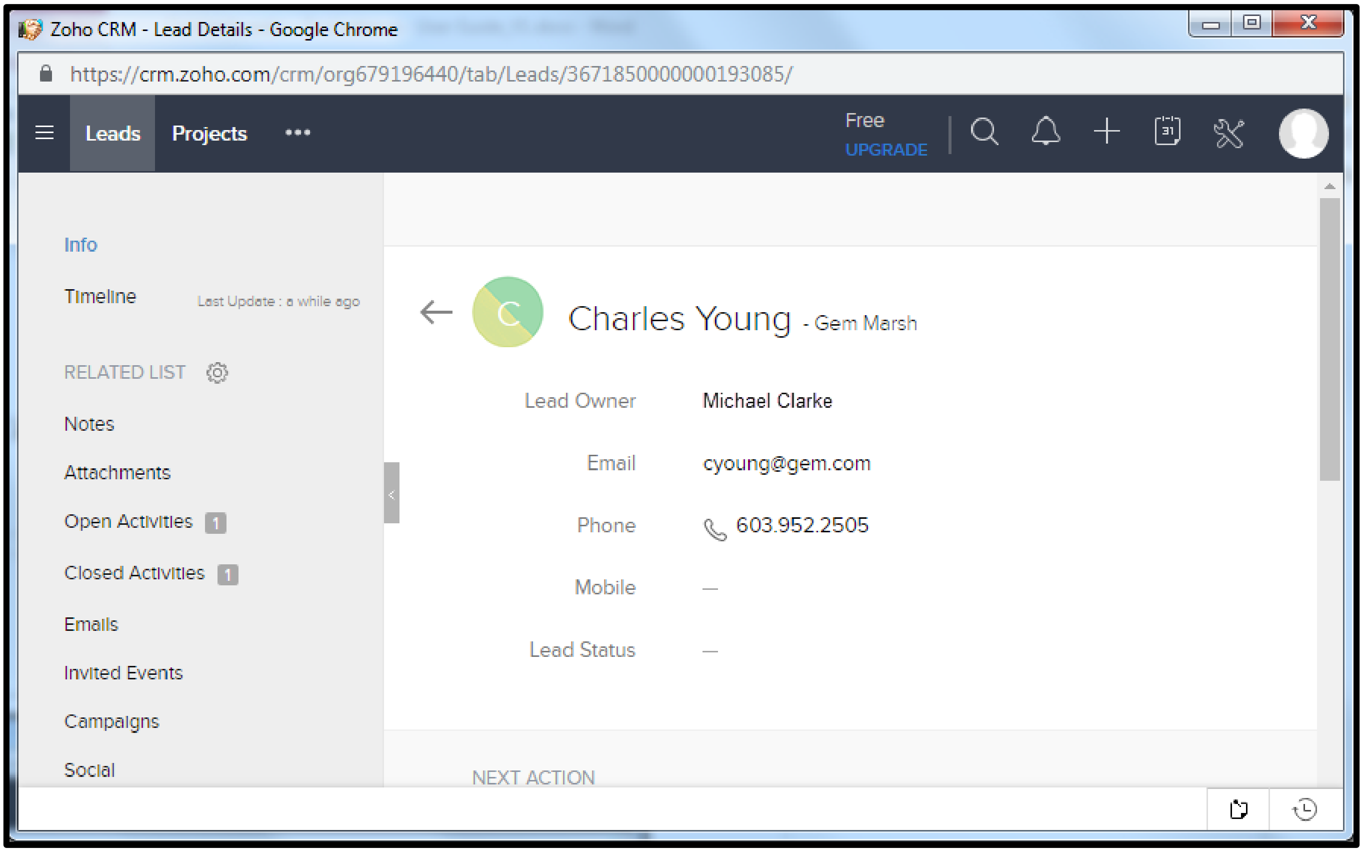
In the **Accounts** tab, you can view and update a prospect's information directly in the CRM using the **CRM** icon CRM.

Find the steps below to view the prospect information in the CRM:

1. In the **Accounts** tab, click on the **Edit** icon to the right of the Account Name.

2. The **Account Details** window will be displayed. Under the **Prospect Info** section, click on the **CRM** button CRM to the right of the prospect you wish to view.

3. The CRM window with the prospect's information will be displayed. If needed, you can edit the prospect information by clicking the **Edit** button.


Zoho CRM - Lead Details - Google Chrome
https://crm.zoho.com/crm/org679196440/tab/Leads/3671850000000193085/
Leads
Projects
Free
UPGRADE
Info
Timeline
Last Update : a while ago
RELATED LIST
Notes
Attachments
Open Activities 1
Closed Activities 1
Emails
Invited Events
Campaigns
Social
Charles Young - Gem Marsh
Lead Owner
Michael Clarke
Email
cyoung@gem.com
Phone
603.952.2505
Mobile
Lead Status
NEXT ACTION

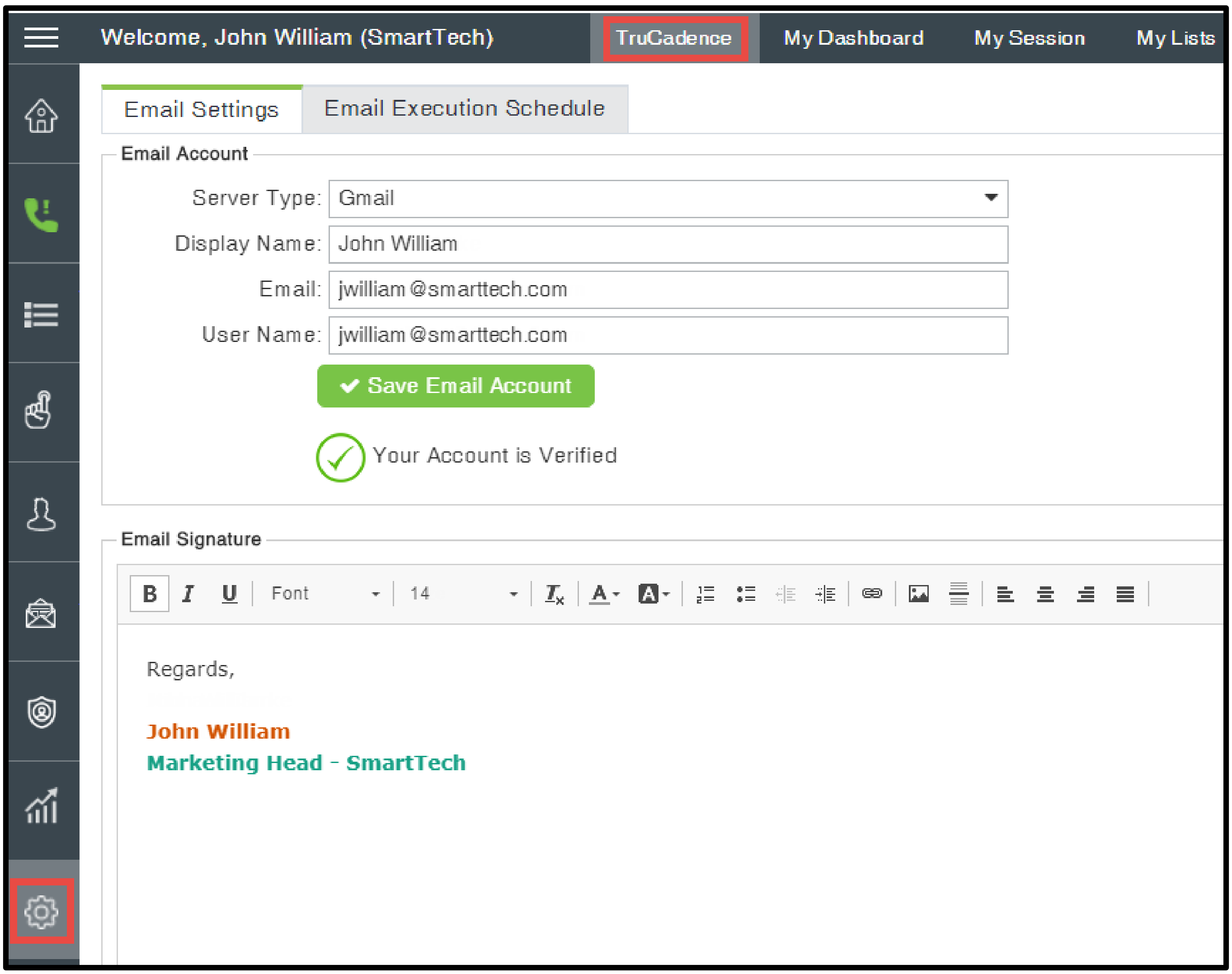
Chapter 9 – Settings Tab

This chapter covers the following topics:

- Email Settings
- Email Execution Schedule

In the **Settings** tab, you can configure the basic settings for Email communication, define Email Templates and add an Email Signature that can be used for **Email Touch**.

Navigation	TruCadence ▶ Settings tab



The Settings tab has two tabs – **Email Settings** and **Email Execution Schedule**

9.1 Email Settings

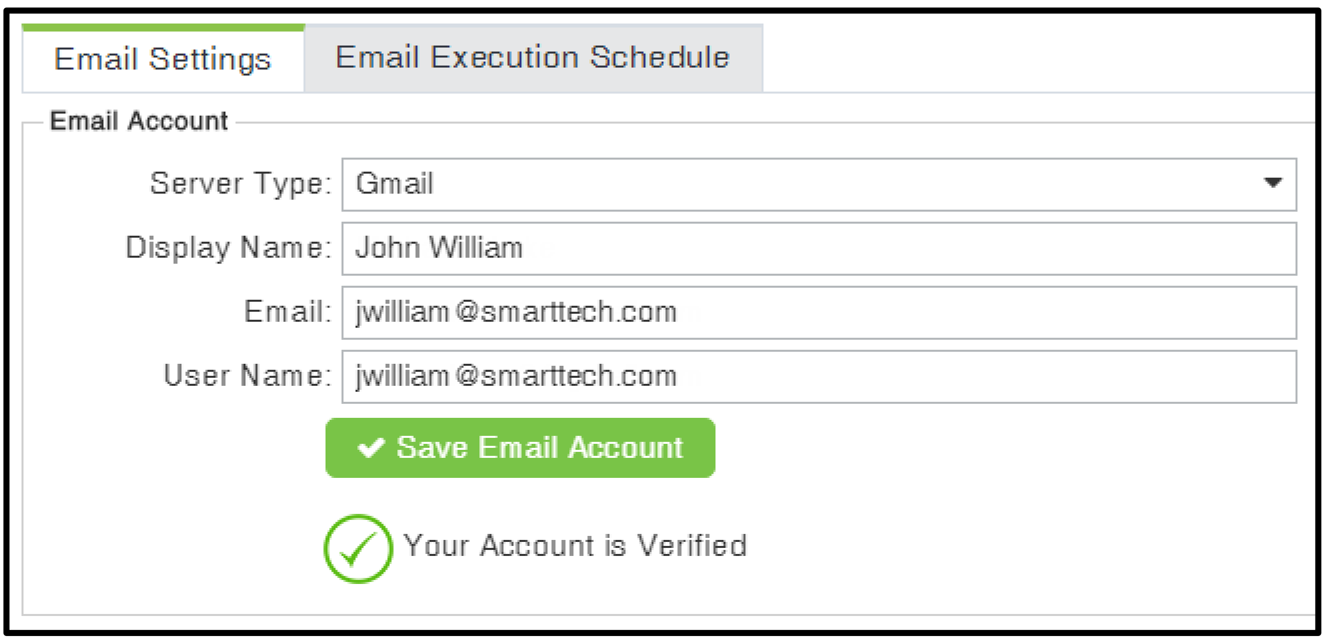
The **Email settings** tab is used to configure your Email Account settings and your Email Signature can be added at the bottom of an Email.

You can find three email server types, which can be used to send emails to the prospects:

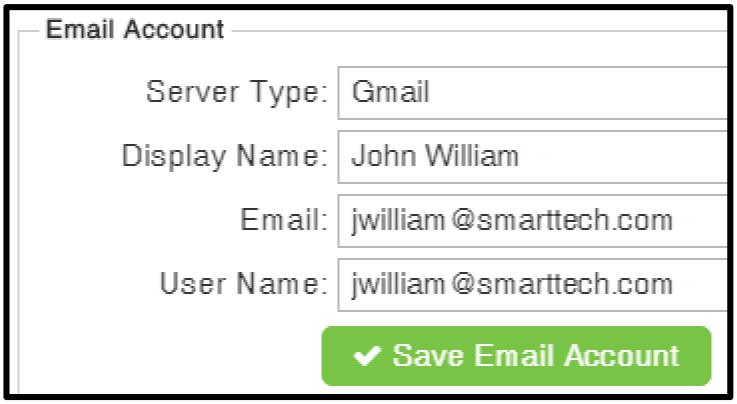
- Gmail
- Office 365
- Microsoft Exchange – Exchange 2007, Exchange 2010, Exchange 2013, Exchange 2016

Find the steps below to configure your Email settings:

1. In the **TruCadence ► Settings** tab, navigate to **Email Settings** tab.



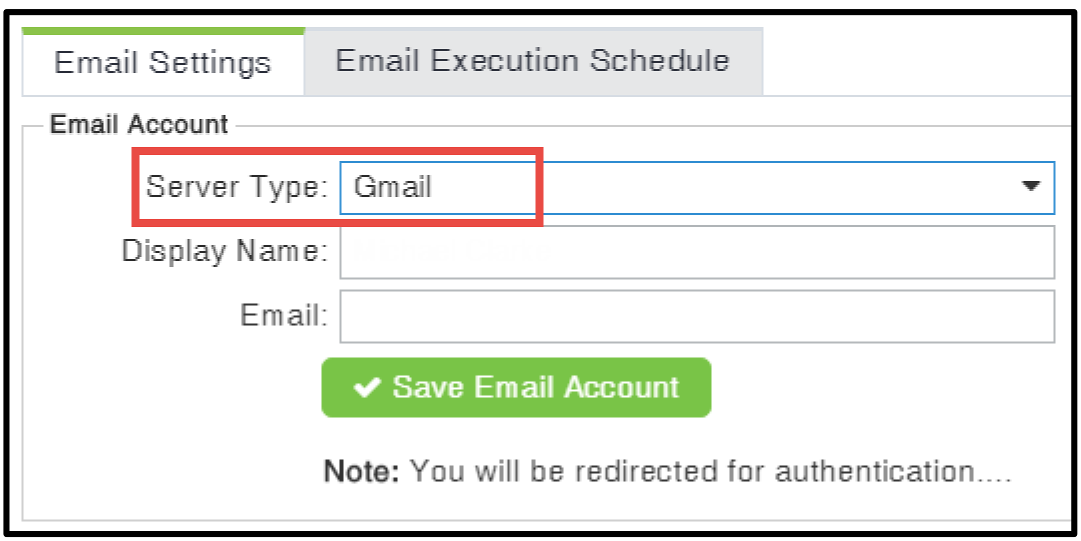
2. In the **Email Account** section, enter the email account details to setup email communication from which the emails are sent to the prospects.



- **Server Type** – Select a **Server Type** from the dropdown through which the email communication has to be performed. The available server types are – **Office 365, Gmail** and **Microsoft Exchange (2007/2010/2013/2016)**

  NOTE: Based on the **Server Type** selection the fields in the **Email Account** section will differ

  <u>Server Type – Gmail</u>



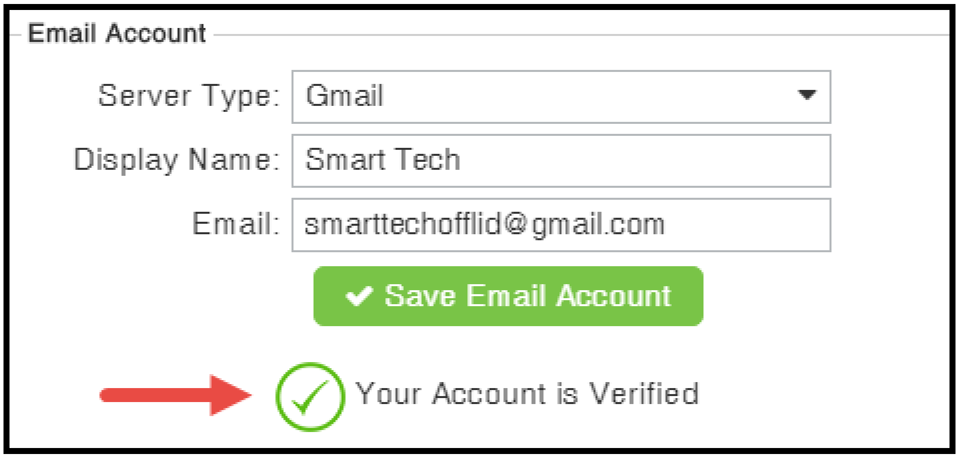
  - **Display Name** – Enter the **Display Name** that has to appear for your account when an email is sent to a prospect

  - **Email –** Enter the **Email address** from which the emails have to be sent to the prospects

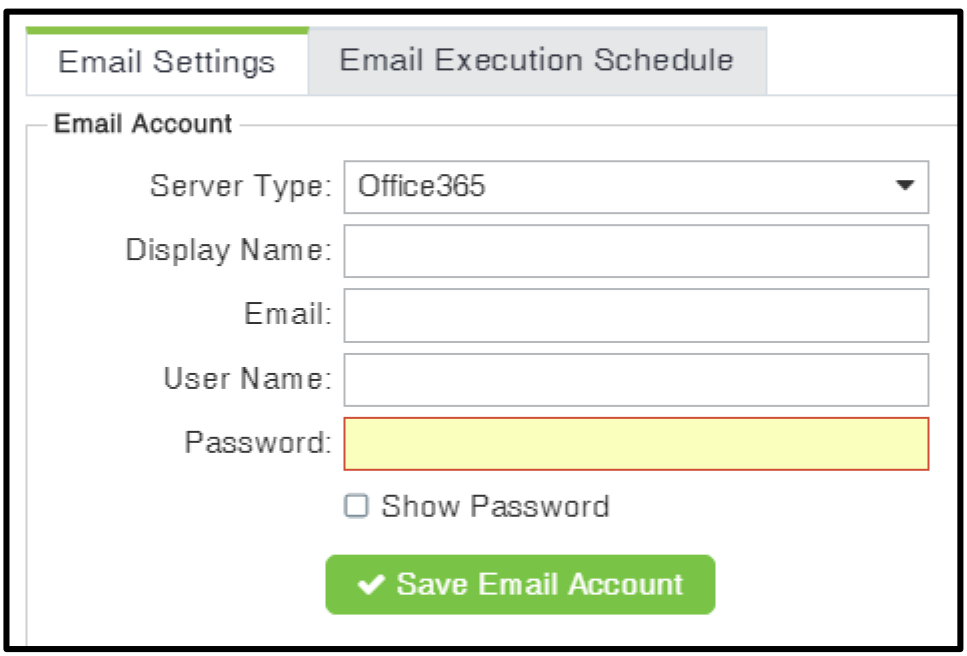
  - **Save Email Account** – Click on the **Save Email Account** button and you will be redirected to the Gmail login page for authentication.

    Provide the password for the email address entered and click **Login**. After successful authentication, you will be reverted to TruCadence® **Settings** ► **Email Settings** tab ►

Email Account section. You will be notified with a green checkmark '**Your Account is Verified**'.

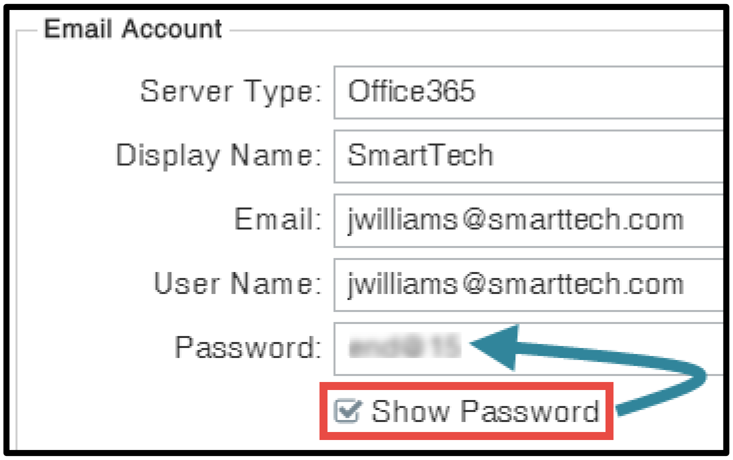


Server Type – Office 365



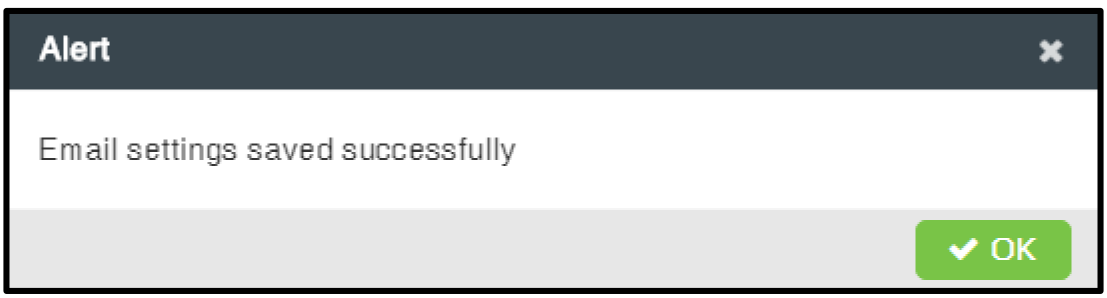
- **Display Name** – Enter a **Display Name** that has to appear for your account when an email is sent to a prospect
- **Email –** Enter the **Email address** from which the emails has to be sent to the prospects
- **User Name –** Enter the User Name of your Email account
- **Password –** Enter your email password

Show Password – Select this option if you want to view the password that you are entering

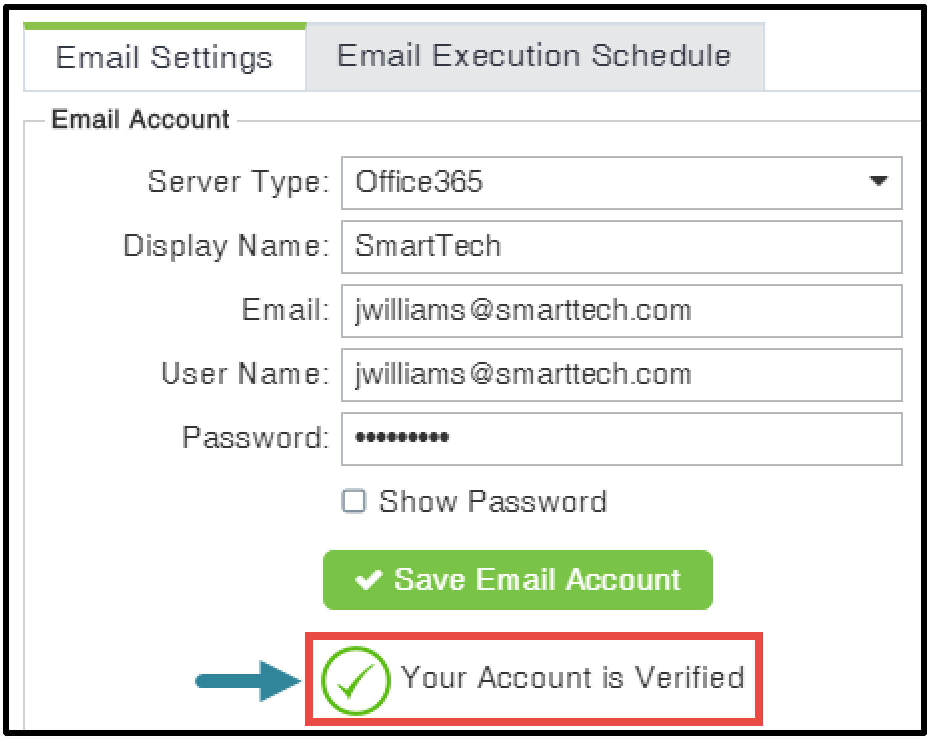


- **Save Email Account** – Click on the **Save Email Account** button. After successful login you will be notified with a green checkmark '**Your Account is Verified**'

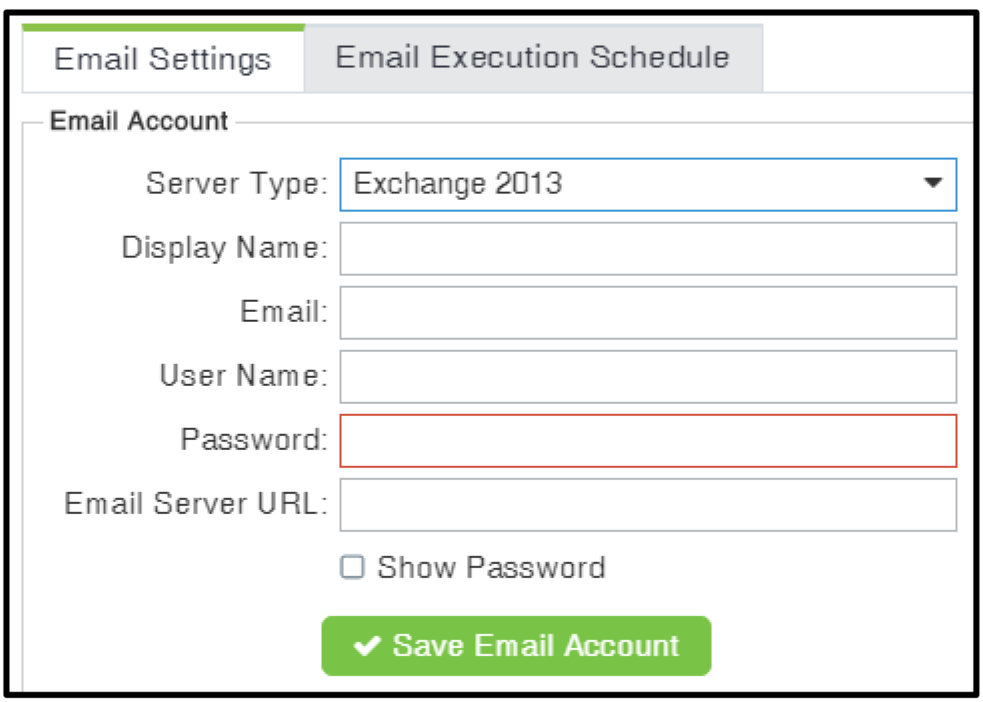
After successful login, an alert message will be displayed, shown below:



Also, you will be notified with a green checkmark '**Your Account is Verified**'



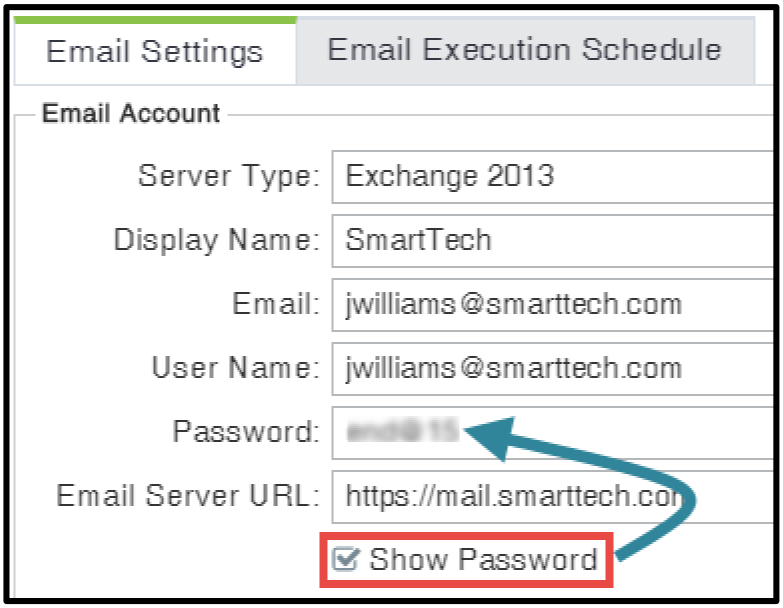
<u>Server Type – Microsoft Exchange (2007/2010/2013/2016)</u>



- **Display Name** – Enter a **Display Name** that has to appear for your account when an email is sent to a prospect

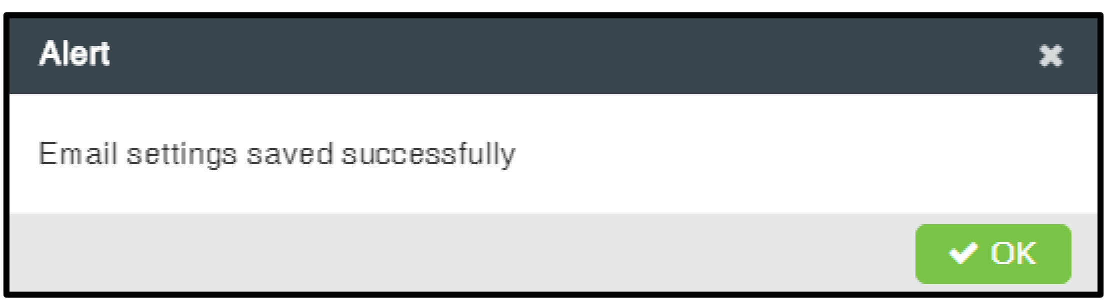
- **Email** – Enter the **Email address** from which the emails has to be sent to the prospects
- **User Name** – Enter the User Name of your Email account
- **Password** – Enter your email password

  Show Password – Select this option if you want to view the password that you are entering

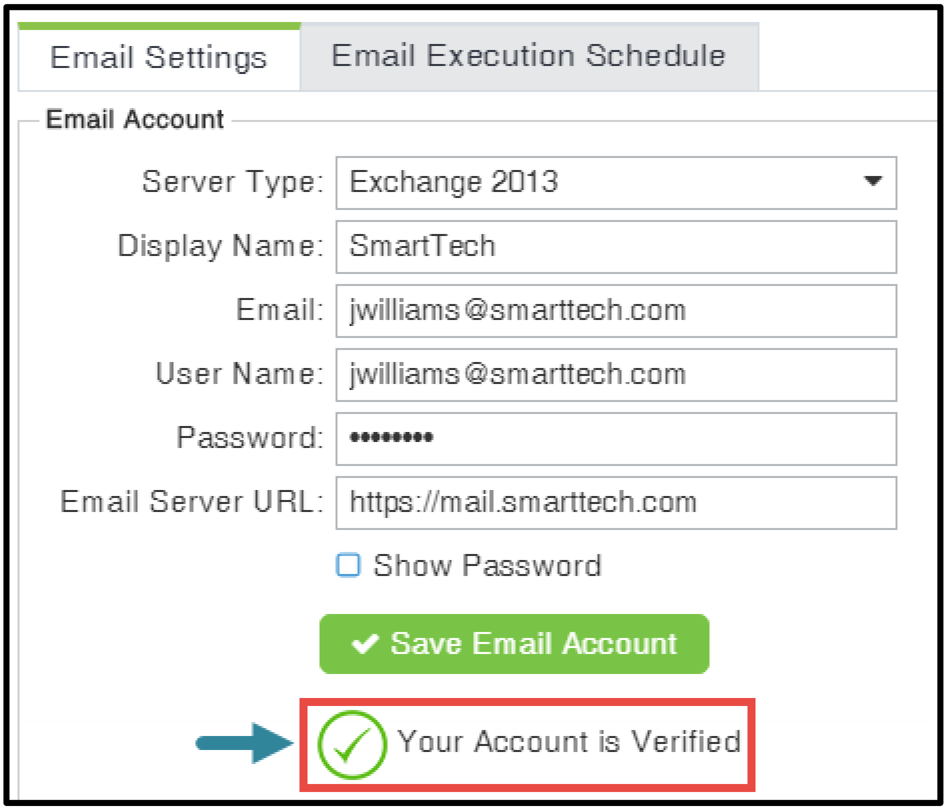


- **Email Server URL** – Enter your **Email Server URL**
- **Save Email Account** – Click on the **Save Email Account** button. After successful login you will be notified with a green checkmark '**Your Account is Verified**'

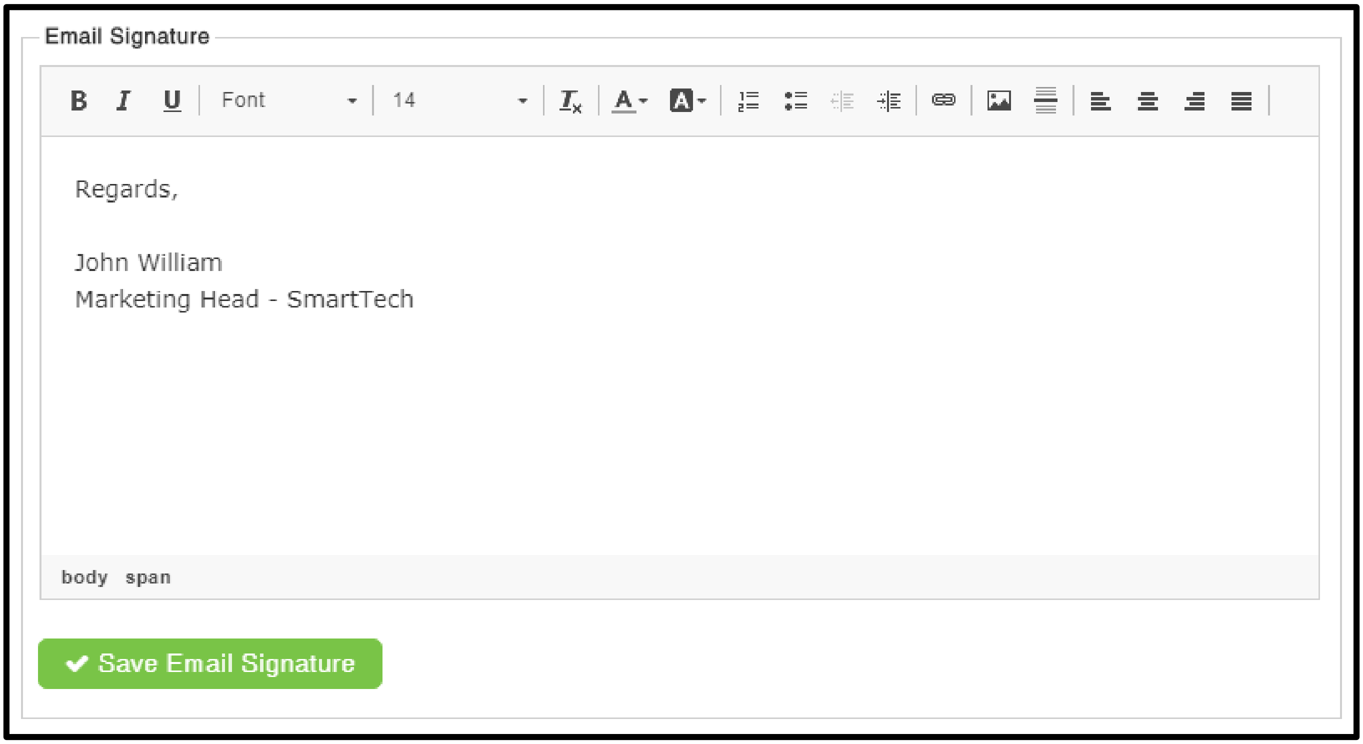
  After successful login, an alert message will be displayed, shown below:



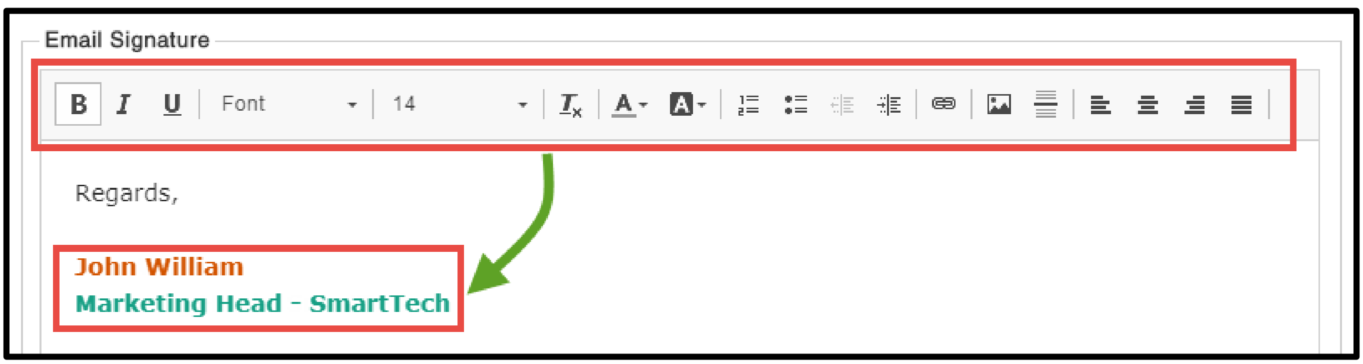
Also, you will be notified with a green checkmark '**Your Account is Verified**'



3. In the **Email Signature** section, you can configure your own Email Signature that can be added to the bottom of an Email.



You can format your signature, using the **Formatting bar** over the **Email Signature** section.

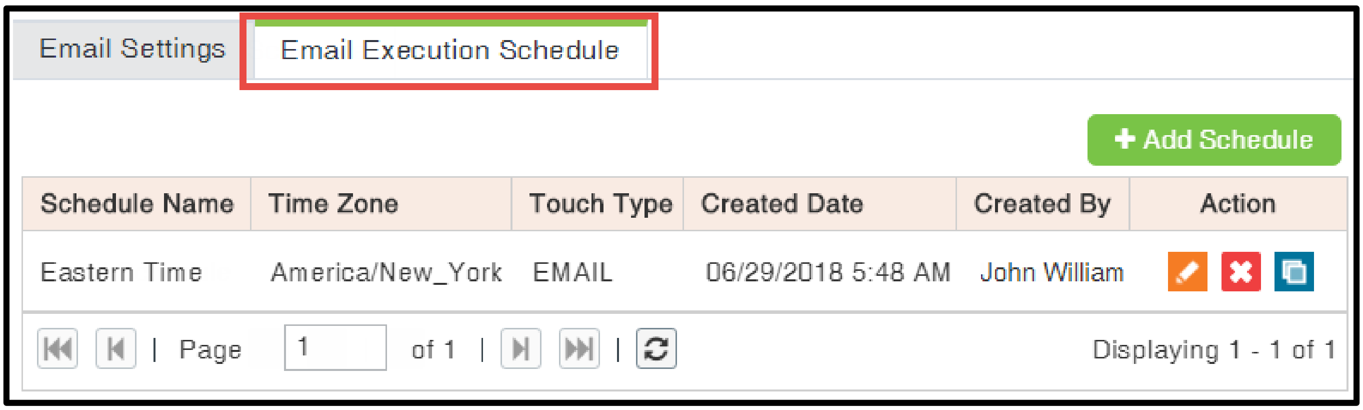


4. Click on the **Save Email Signature** button to save the settings configured.

9.2 Email Execution Schedule

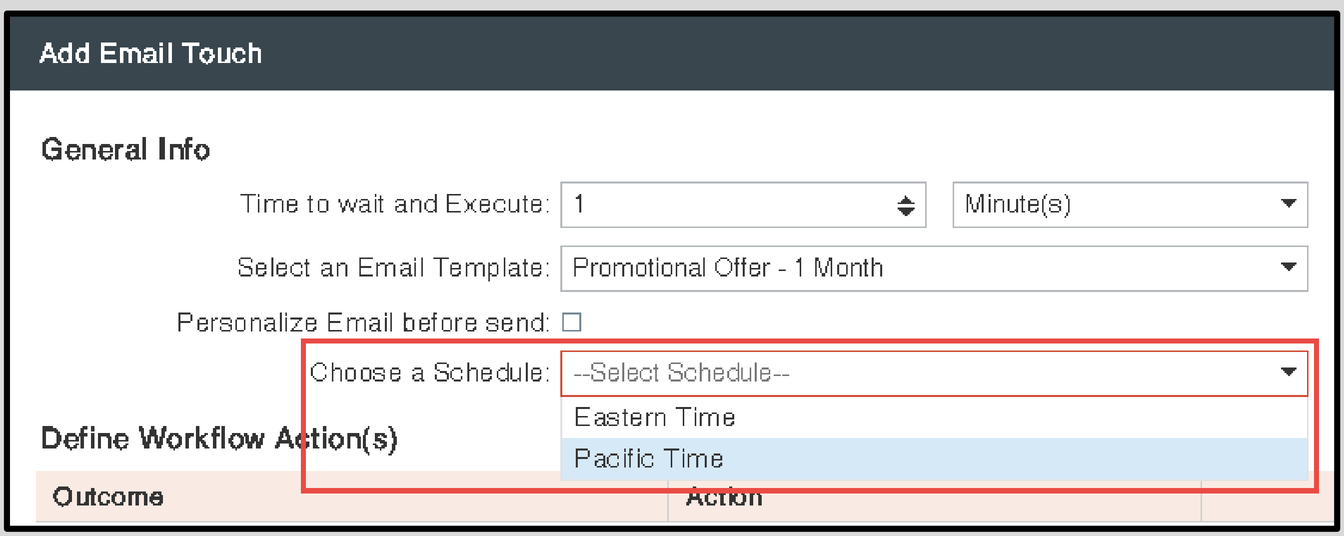
The **Email Execution Schedule** is used to schedule and send emails automatically to prospects (assigned to a Cadence with **Email Touch**) based on the time zone selected. Emails that have been sent will be logged and sent only during the selected time zone.

Navigation	TruCadence ▶ Settings ▶ Email Execution Schedule tab

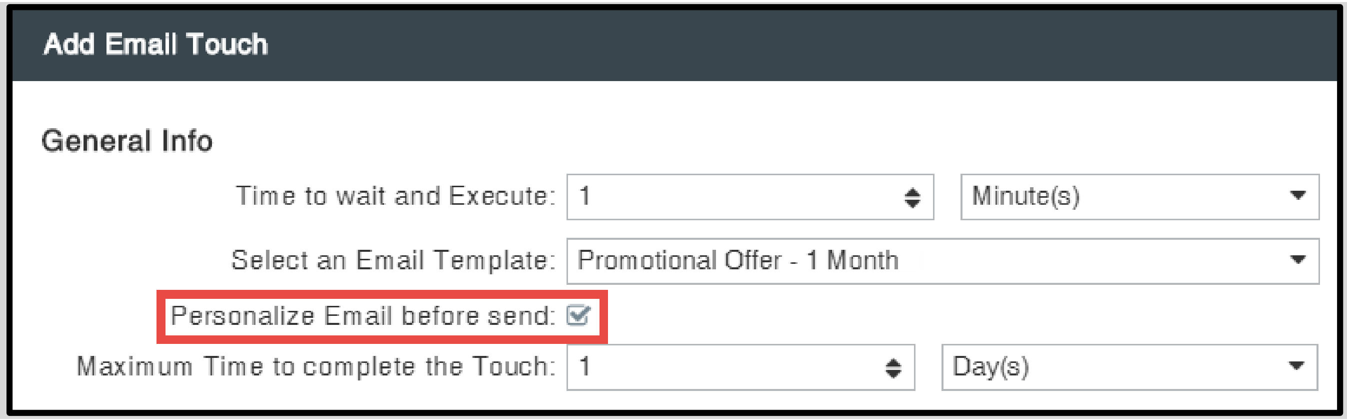


IMPORTANT NOTE

- Emails will be sent automatically (during the time slot & time zone selected) only for the Email Touch(es) that are assigned with an **Email Execution Schedule**

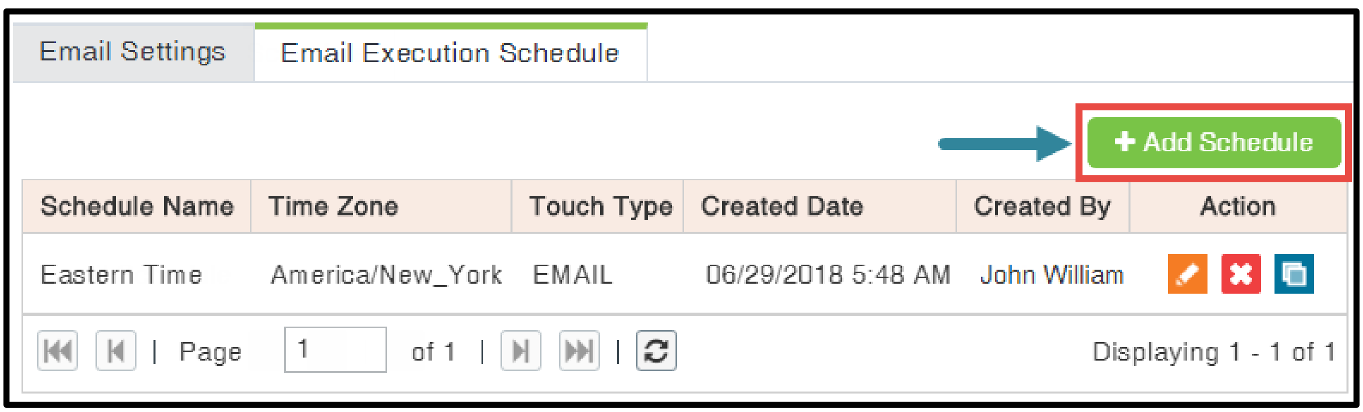


- If an Email Touch is selected for preview option (**Personalize Email before send**), then emails will be logged in the **To Do** tab and you will have to send them manually

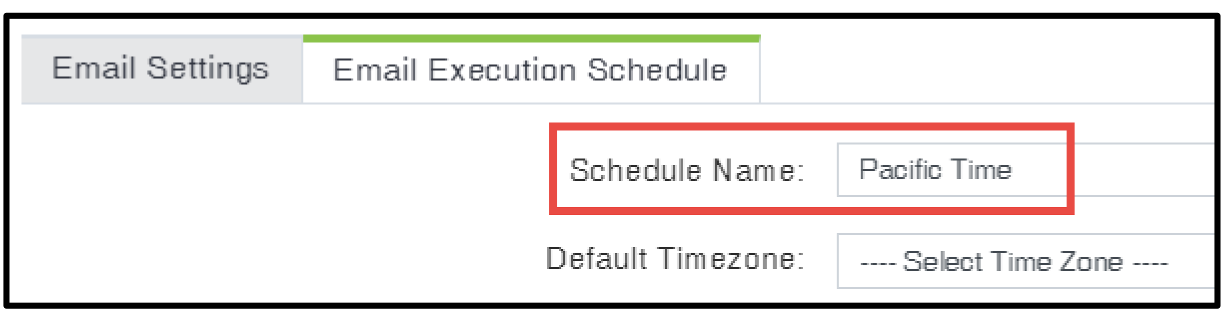


Find the steps below to setup an email touch schedule:

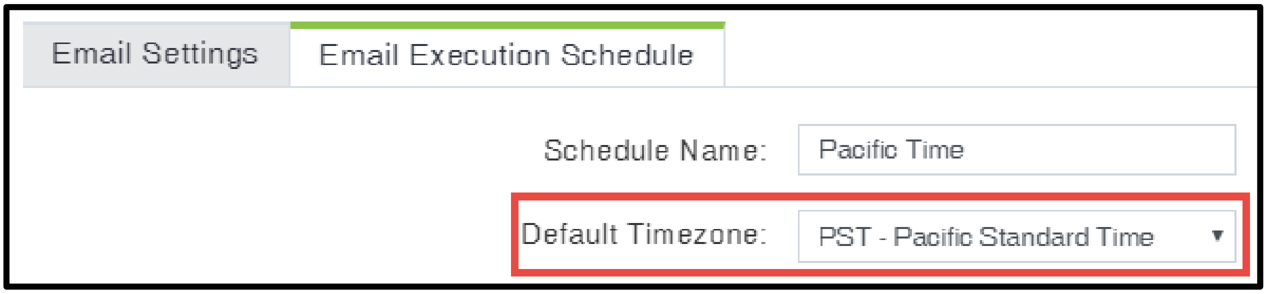
1. Under the **TruCadence ► Settings ► Email Execution Schedule** tab, click on the **Add Schedule** button.



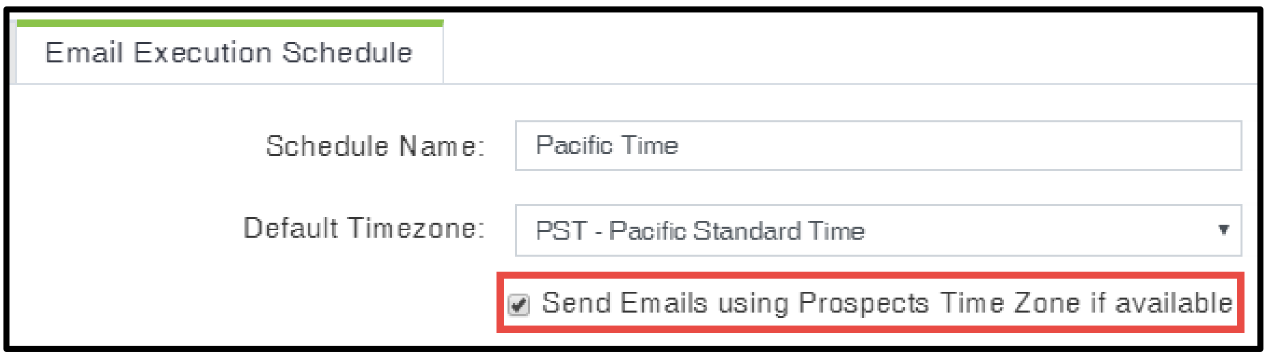
2. Enter a **Schedule Name** in the respective field.



3. Select the **Time Zone** you want to use to send the emails from.



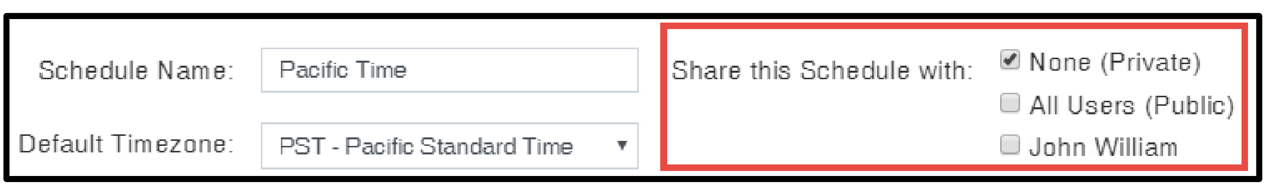
If you wish to send emails from the prospects time zone instead of the **Default Time Zone**, then select the **Send Emails using Prospects Time Zone if available** checkbox.



IMPORTANT NOTE

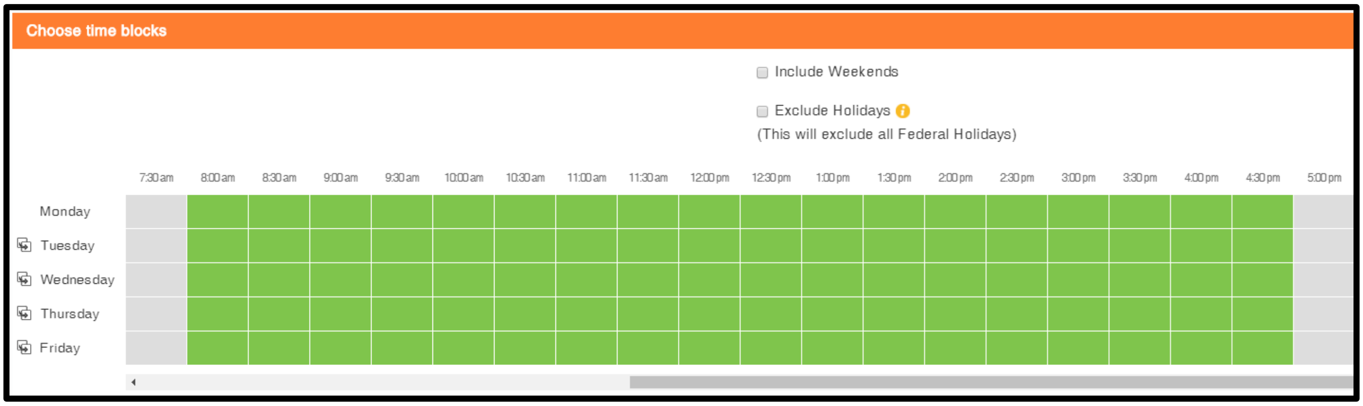
If the above checkbox remains unselected, then even if the assigned prospects are in a different Time Zone, the application will send auto emails based on the default Time Zone selected during the **Time Blocks** selected in **Step 5**.

4. If required, you can select the manager's teams with whom you would like to share the schedule with.



5. **Choose time blocks** – Choose the time slots for the week during which the emails have to be sent.

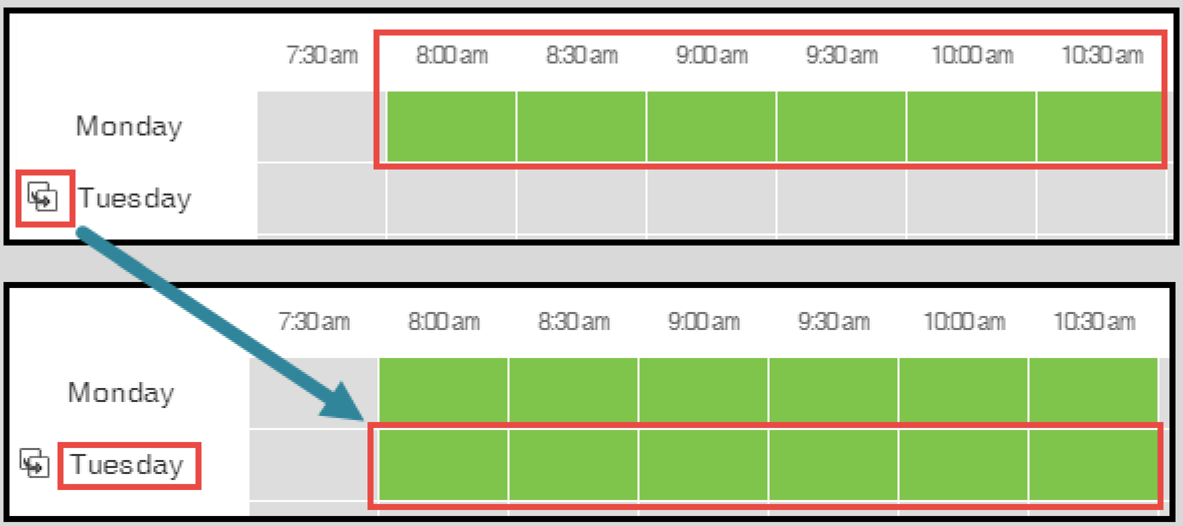
   For example, if you have selected between 8:00 AM and 5:00 PM, then all the emails will be sent automatically during the time slot selected. Emails after the time block will be logged (in the server) and sent on the next available time slot.



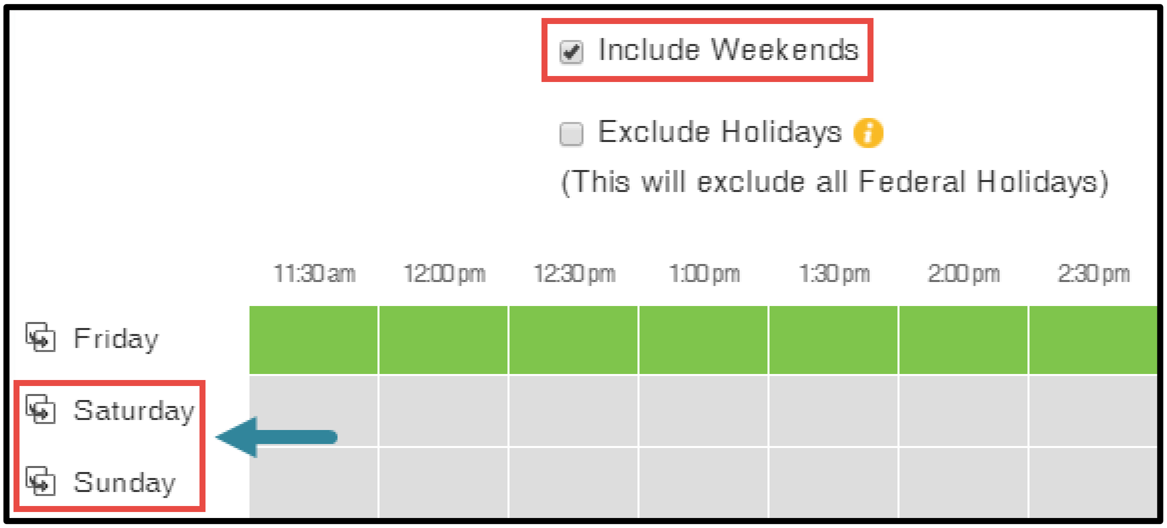
IMPORTANT NOTE

Recurring bookings for consecutive days can be made easily by simply clicking the **Copy from above** icon (adjacent to the day) to copy and book the same time slot from the previous day.

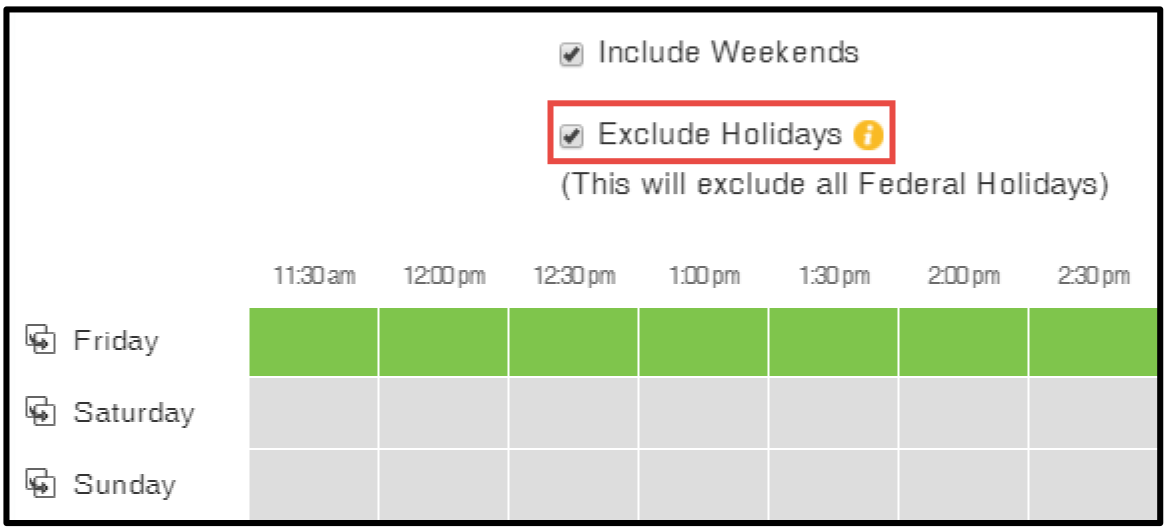
For example, if you want to book the same time slots of Monday for Tuesday, then click the **Copy from above** icon adjacent to Tuesday. The same time slots will be booked for Tuesday, as shown below:



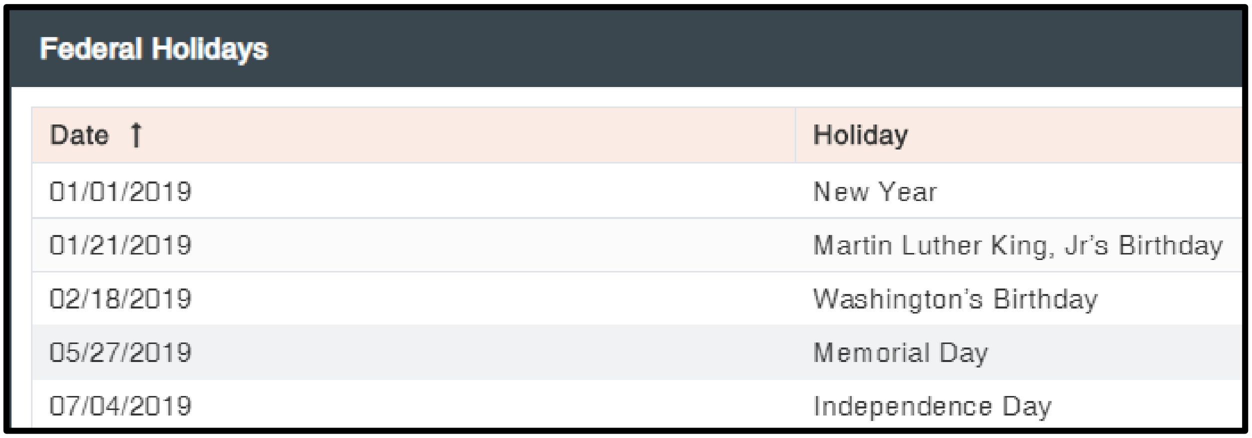
6. To send emails even on weekends, select the **Include Weekends** checkbox. On selecting this check box, the time slots for Saturday and Sunday will be displayed.



7. To exclude sending emails on Federal Holidays, select the **Exclude Holidays** checkbox.



To know the Federal Holidays for the current year, click on the icon next to the **Exclude Holidays** checkbox. The **Federal Holidays** window opens where you can find the list of holidays.

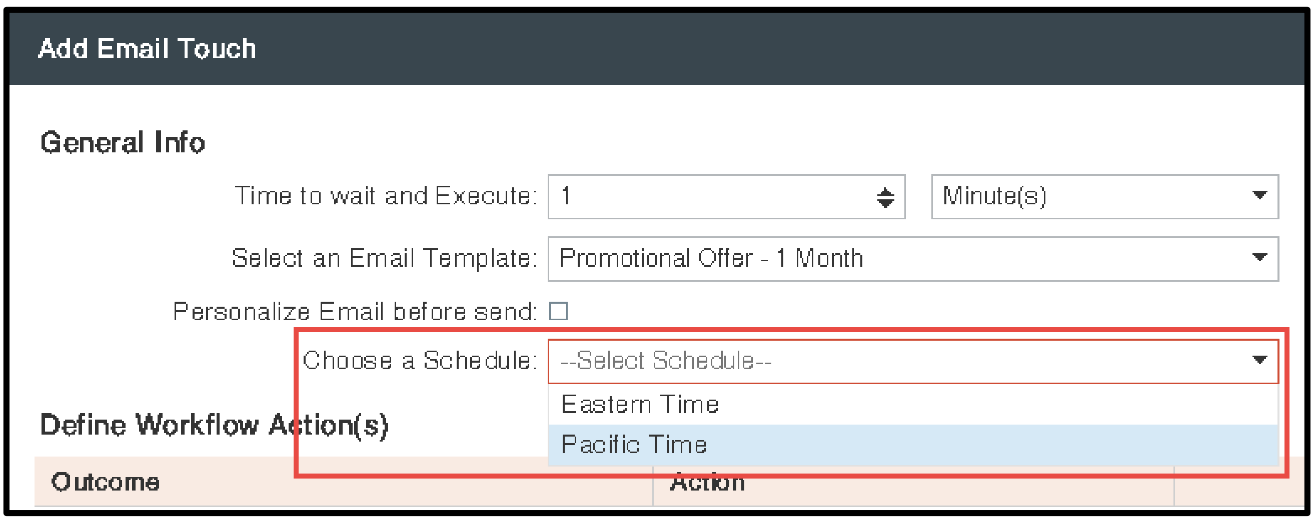


Federal Holidays

Date	Holiday
01/01/2019	New Year
01/21/2019	Martin Luther King, Jr's Birthday
02/18/2019	Washington's Birthday
05/27/2019	Memorial Day
07/04/2019	Independence Day

8. Click **Save & Close** to save the email schedule or click **Cancel** to cancel the schedule process.

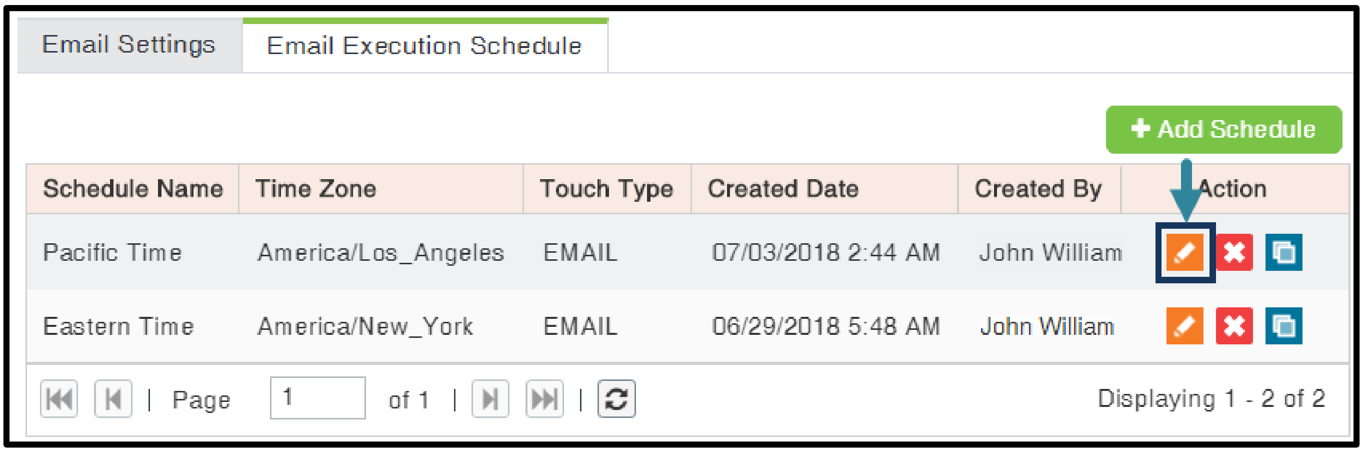
9. The email schedules that were created will be listed under **Add/Edit Email Touch** window ► **Choose a Schedule** dropdown. Select the required email schedule to send the emails automatically.



9.2.1 Edit a Schedule

Find the steps below to edit an email touch schedule:

1. Under the **TruCadence ► Settings ► Email Execution Schedule** tab, click on the **Edit** icon to the right of the schedule you wish to edit.

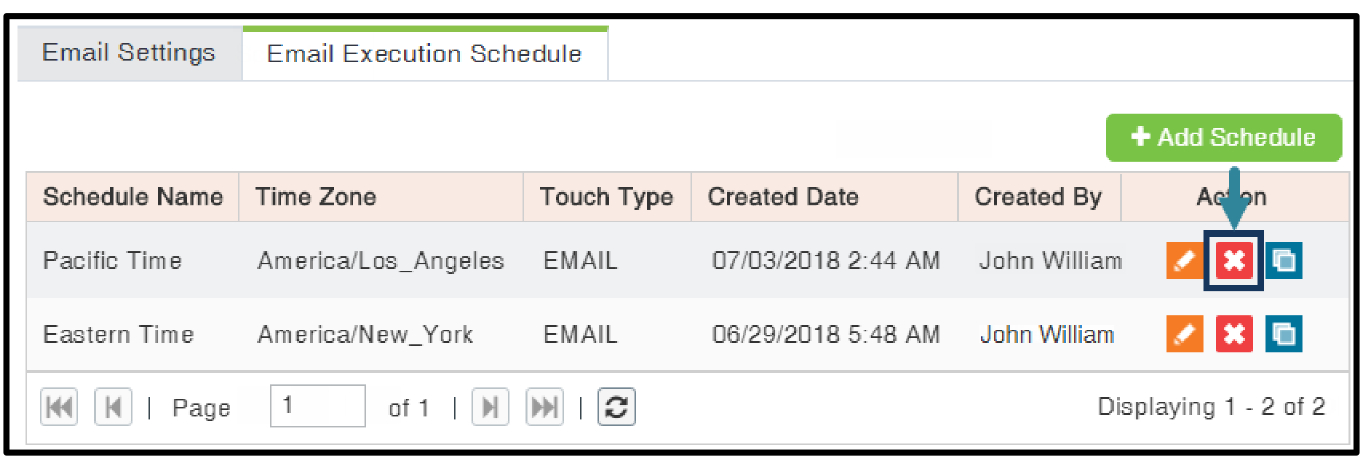


2. The **Edit Schedule** window will popup. Make the necessary changes and click **Save & Close** button to save the changes made.

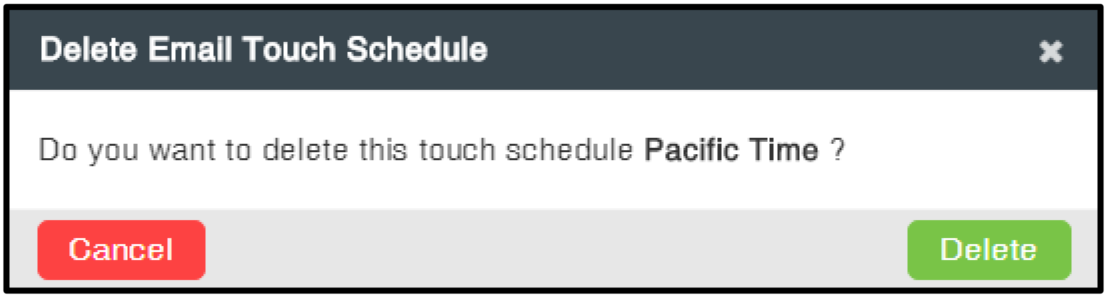
9.2.2 Delete a Schedule

Find the steps below to delete an email touch schedule:

1. Under the **TruCadence ► Settings ► Email Execution Schedule** tab, click on the **Delete** icon to the right of the schedule you wish to delete.



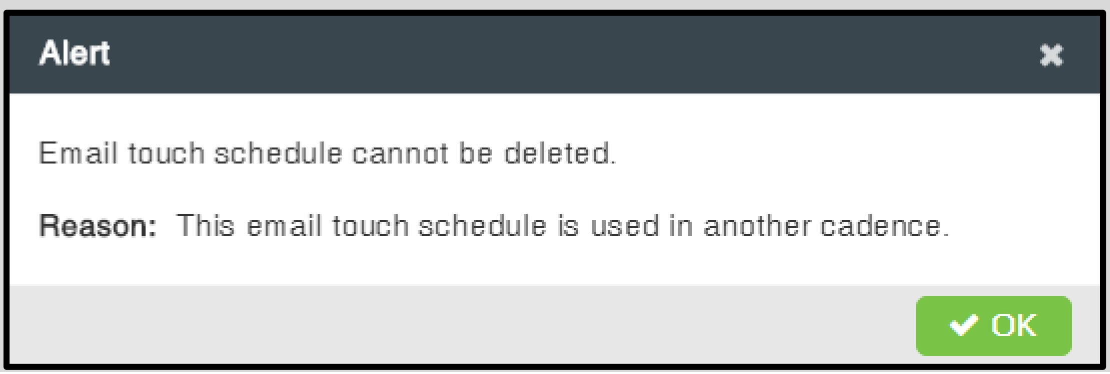
2. A confirmation message will be displayed as shown below:



Click **Delete** to delete the schedule or click **Cancel** to cancel the process.

IMPORTANT NOTE

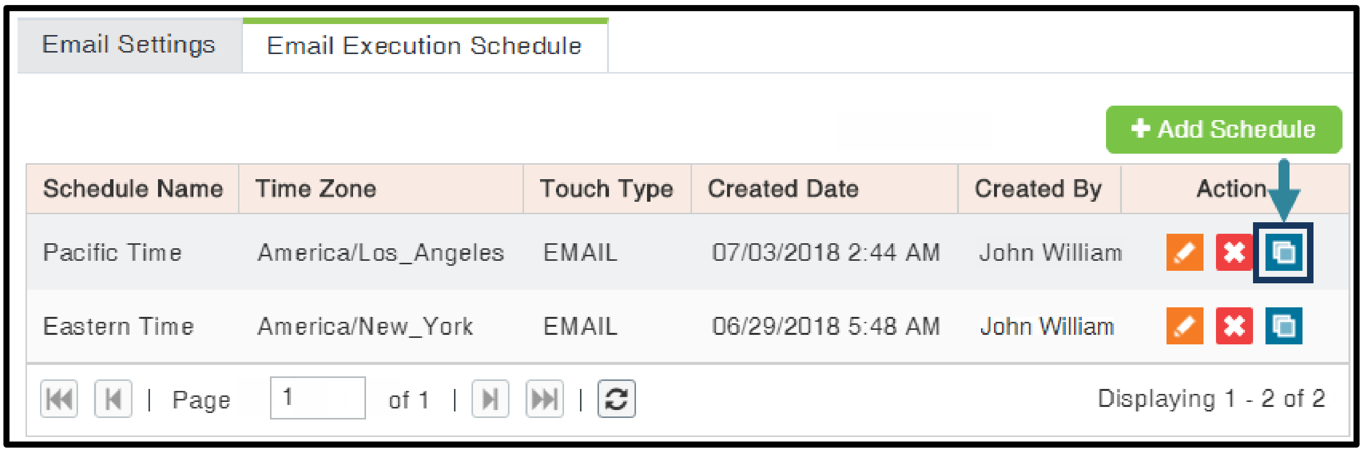
If an email schedule is used in a Cadence, then an alert message shown below will be displayed stating the schedule cannot be deleted:



9.2.3 Clone a Schedule

Find the steps below to clone an email touch schedule:

1. Under the **TruCadence ► Settings ► Email Execution Schedule** tab, click on the **Clone Schedule** icon to the right of the schedule you wish to clone.

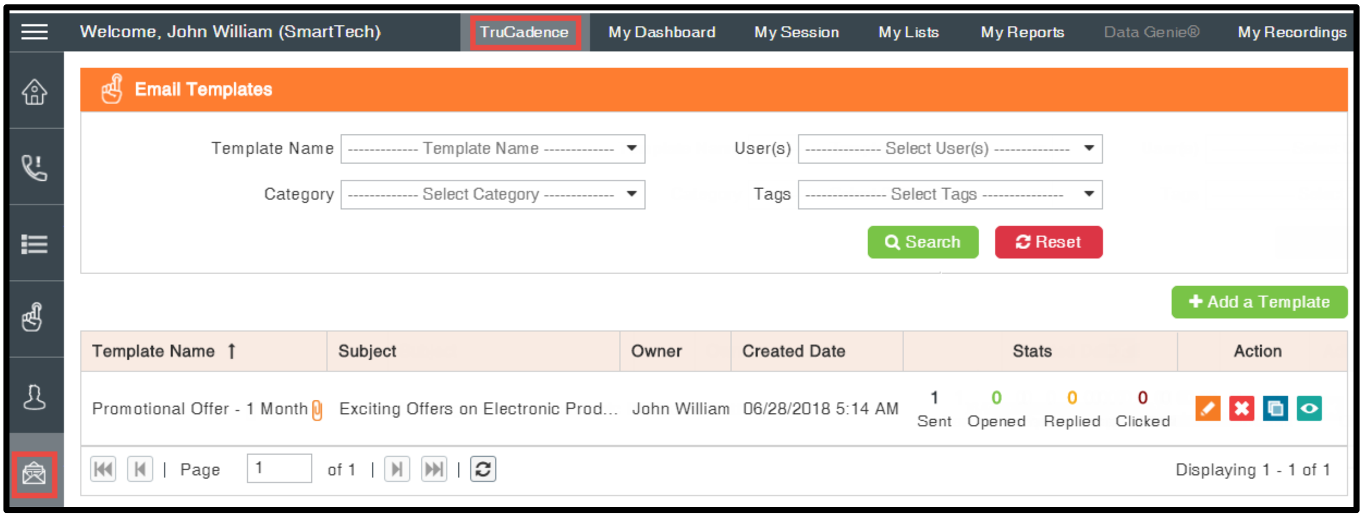


2. The respective schedule will open. Change the schedule name and make the necessary changes and click **Save & Close** button.

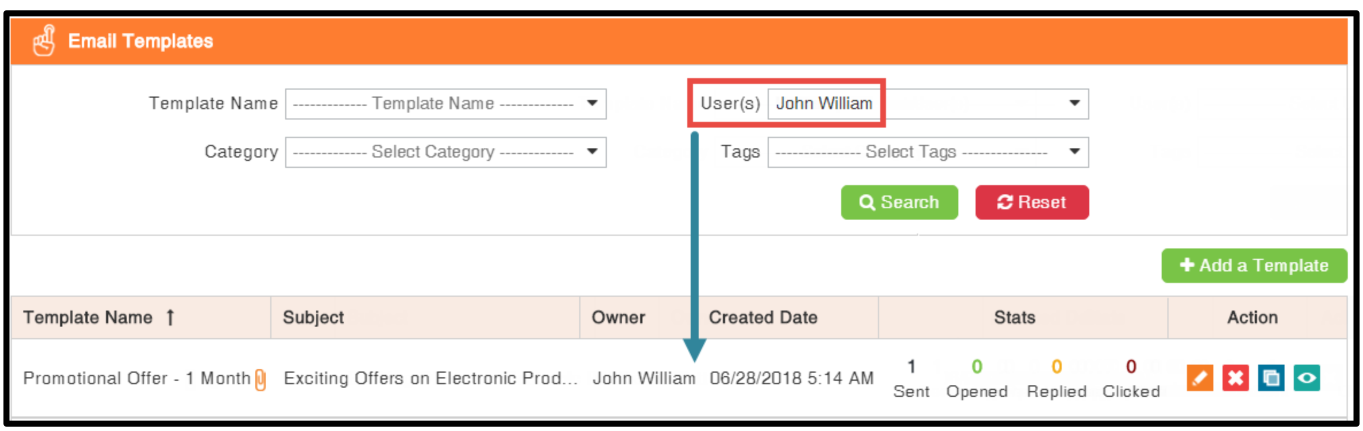
Chapter 10 – Email Templates

The **Email Templates** tab is used to create, edit, delete and clone an email template. Here, you can design your own email templates for business promotions.

Navigation	TruCadence ► Email Templates



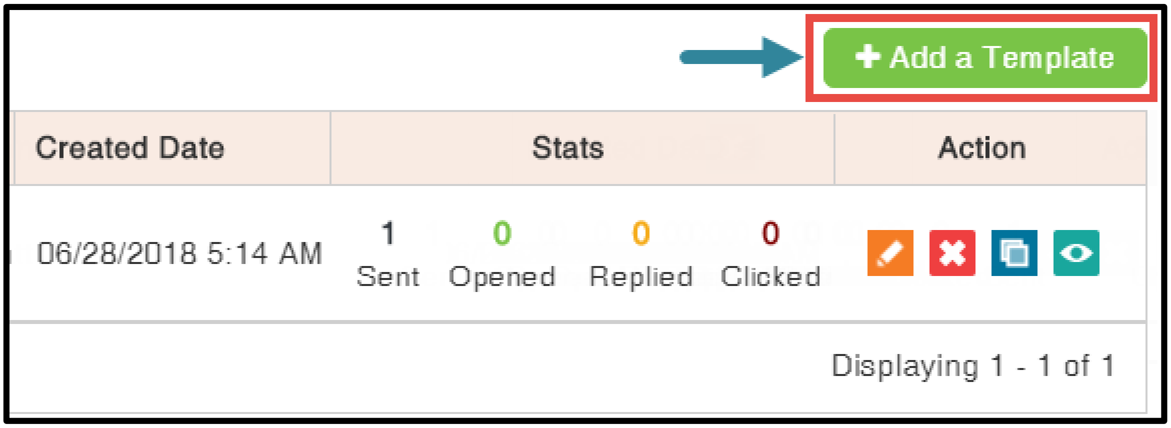
You can search and view the required Email Template(s) using one of the following fields – Template Name, User(s), Category and Tags



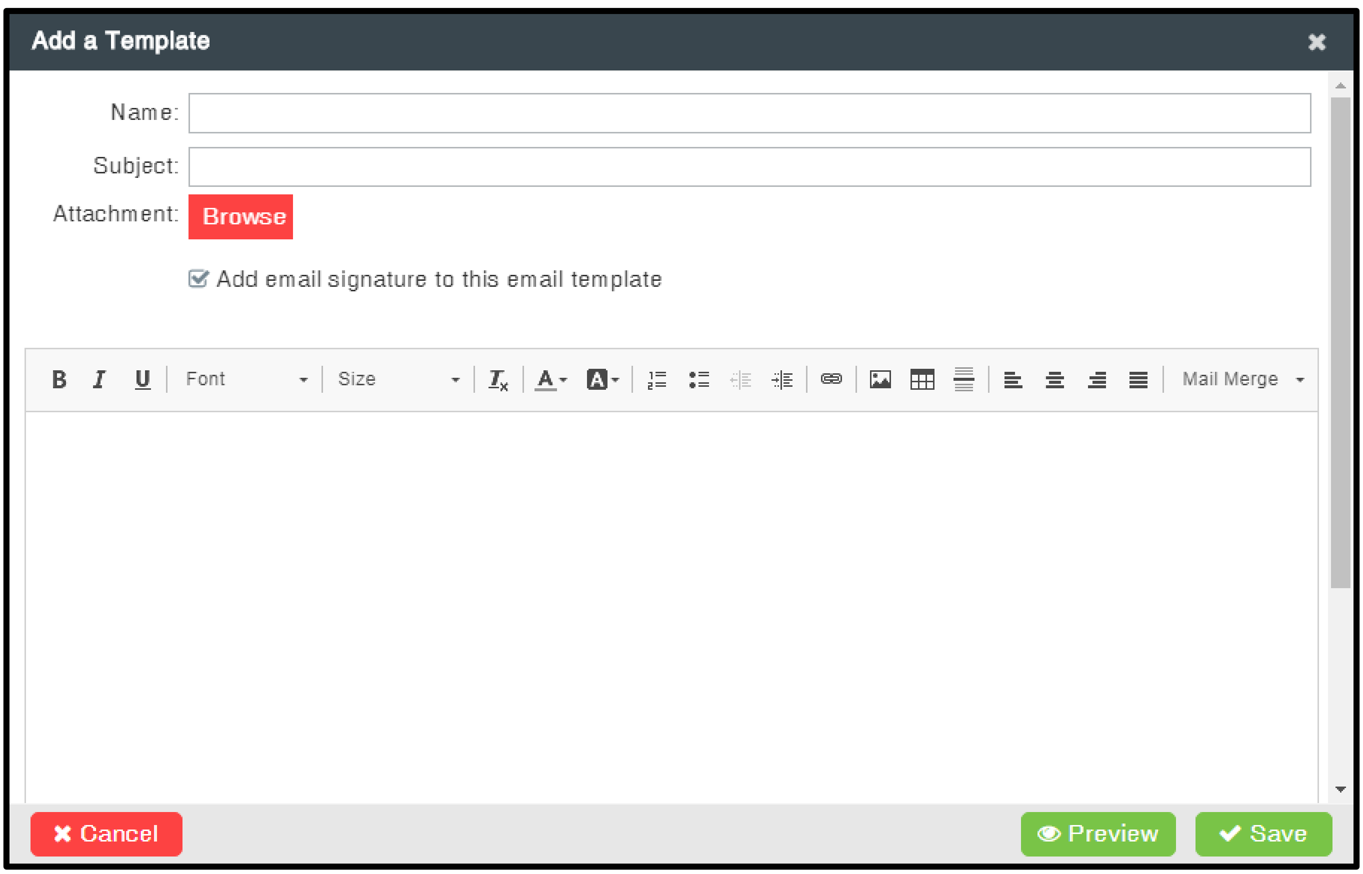
10.1 Add a new Email Template

Find the steps below to create a new Email template:

1. In **TruCadence Email Templates**, click on the **Add a Template** button.

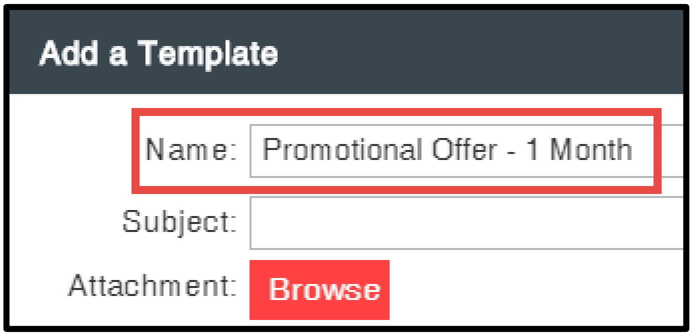


2. The **Add a Template** window will be displayed.



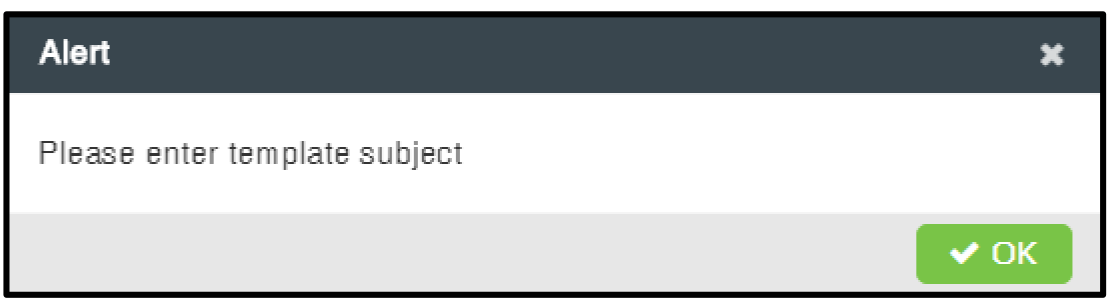
3. Provide the details required in the fields below:

- **Name** – Enter the name of the Template.

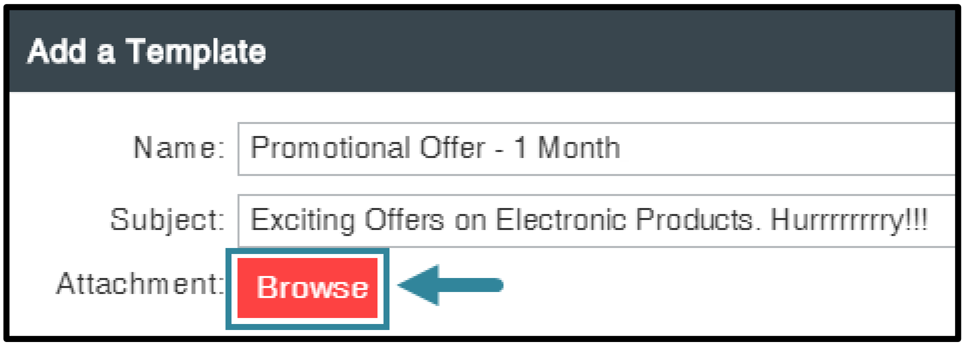


If email name is not provided, then the alert message below will popup when saving the template

- **Subject** – Enter the Email Subject. If the email subject is not provided, then the alert message below will popup when saving the template

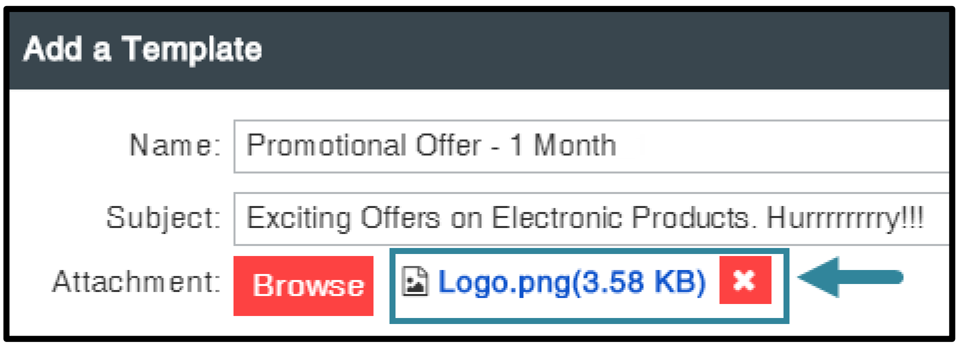


- **Attachment** – Not a mandatory option. You can browse and add an attachment that has to be sent to prospects, by clicking the **Browse** button

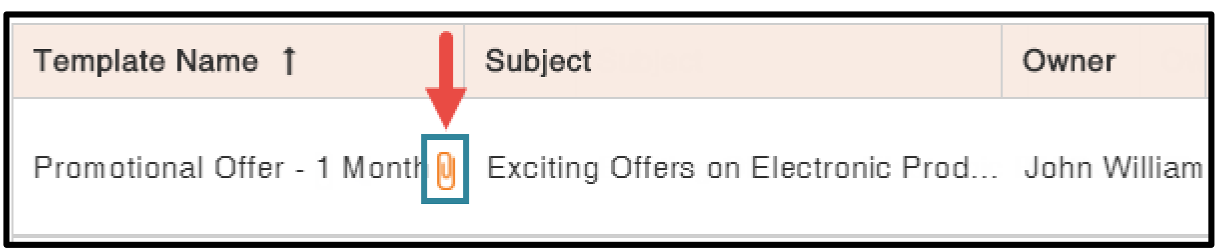


NOTE: Only 3 attachments can be added per template and the maximum size of the attachments is limited to 5MB.

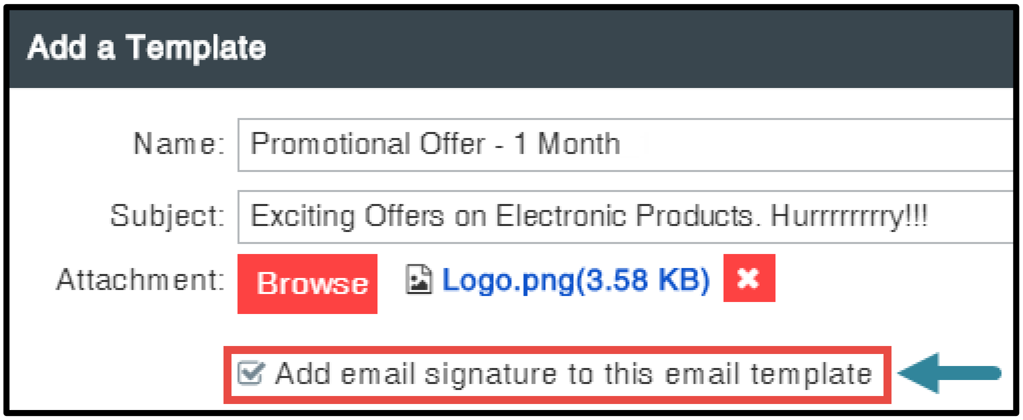
You can view the attachment next to the **Browse** button, as shown below:



NOTE: Email Templates with an attachment will have an **attachment** icon next to the template name.

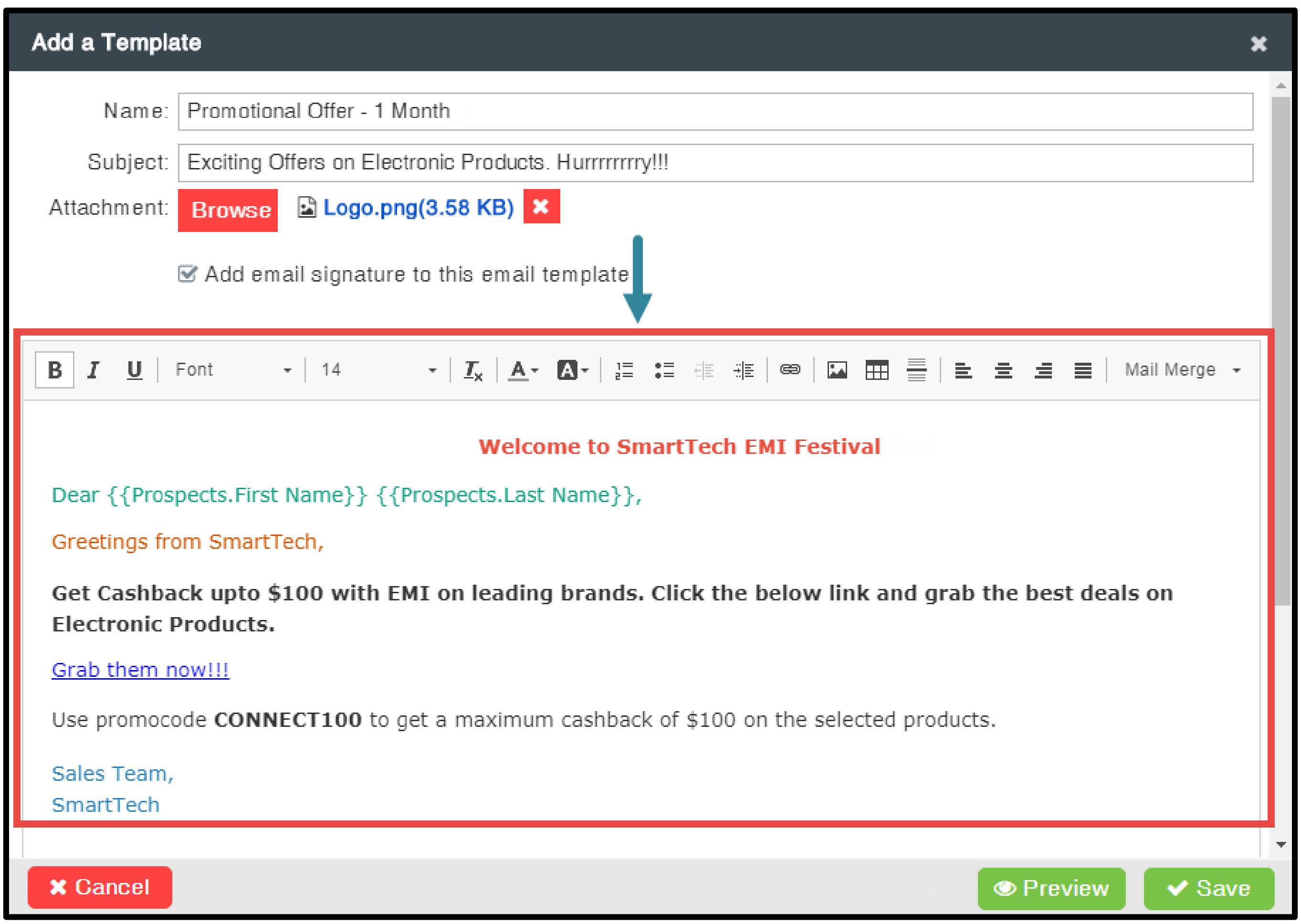


- **Add email signature to this email template –** Select to add the email signature that was configured in the **Email Settings** tab. By default, this option will be enabled

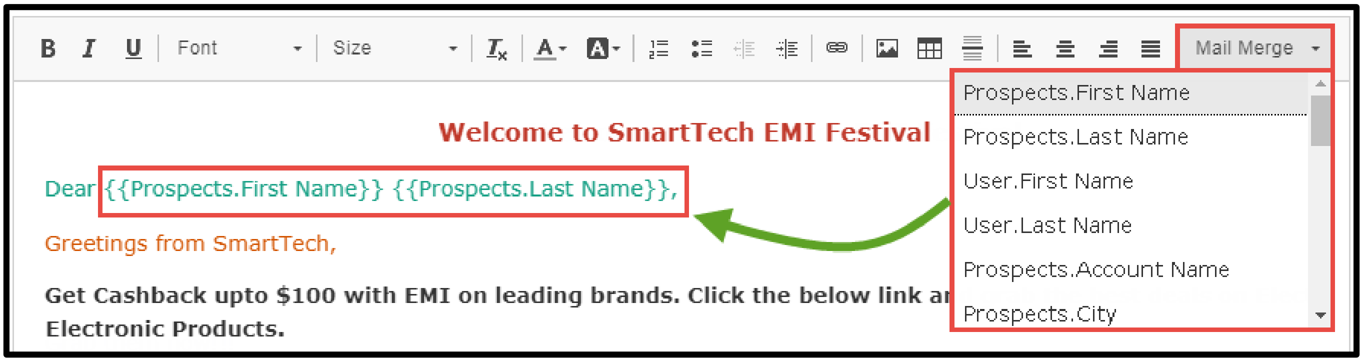


To add a new email signature, deselect this option and add a new email signature at the end of the email body section.

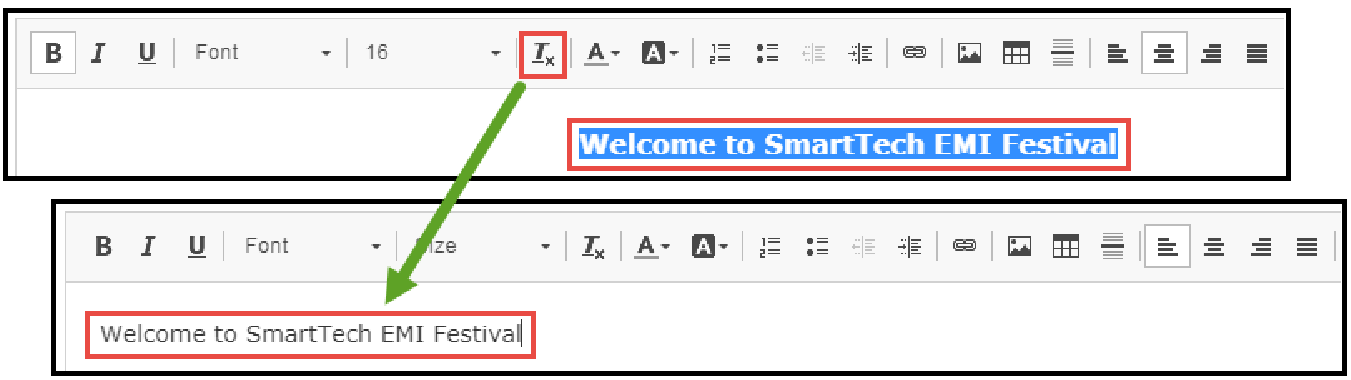
- **Email body section** – Enter the information that has to be conveyed to the prospects. The information entered can be formatted using the **formatting bar** over the email body section.



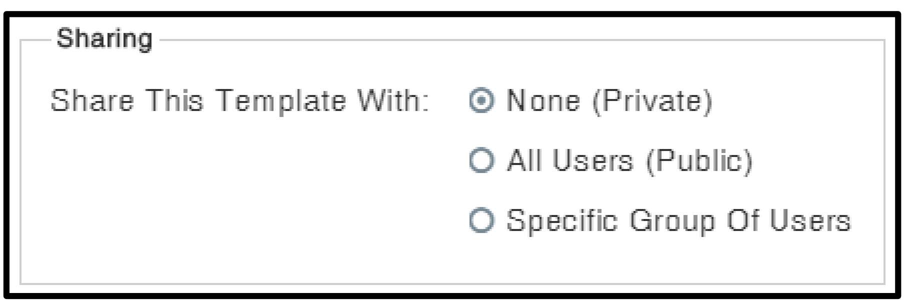
Use the **Mail Merge** option to fetch and display the individual recipient's information, when sending emails.



You can remove the text format applied by highlighting the text and click the **Remove Format** button in the **formatting bar**.

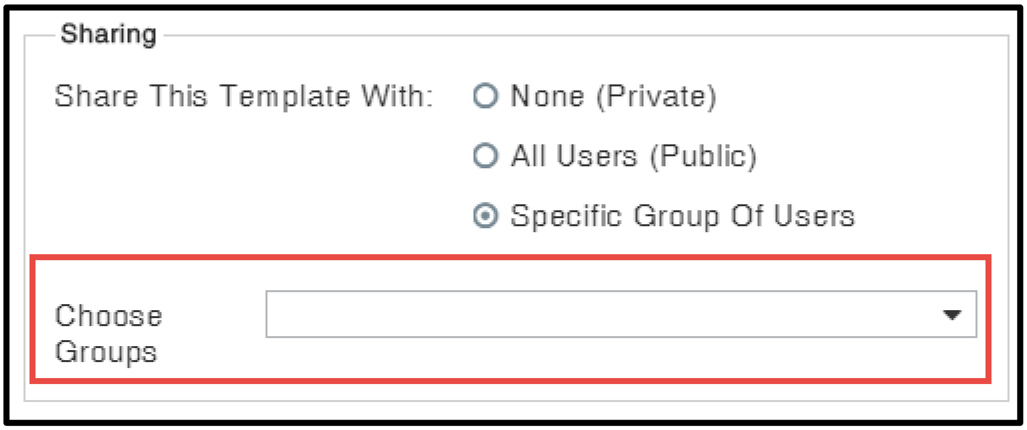


- **Sharing** – Select the required option from the following:

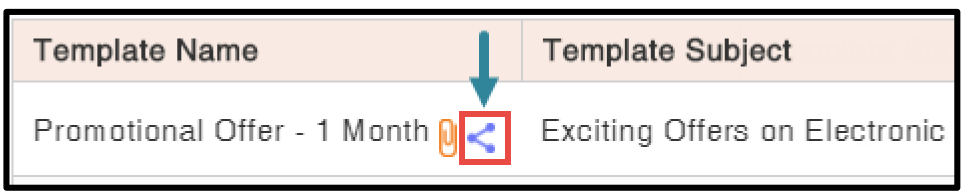


  - **None (Private)** – Select this option, if you do not want to share the template with anyone
  - **All Users (Public)** – Select this option, if you wish to share the template with all users in an organization
  - **Specific Group Of Users –** If you wish to share the template with a specific team(s) (both the managers and its assigned user), then select this option.

When selecting this option, the **Choose Groups** dropdown will be enabled. Select the manager(s) from the list you wish to share with. When the manager(s) is selected, all the users under the selected manager(s) will also be able to view and use the email template.

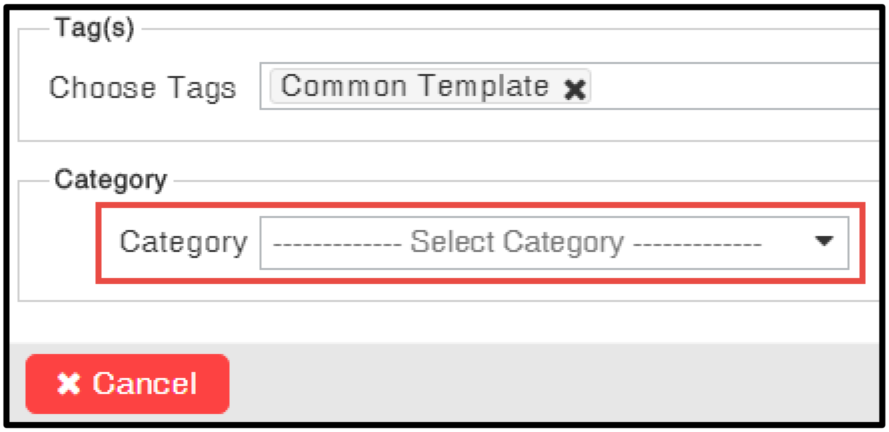


The shared Email Templates (shared by the Manager) will have a **shared** icon next to the template name.



NOTE: Once a template is shared, you cannot modify the share settings anymore, as the **Save** button will be disabled upon sharing.

- **Tag(s)** – Enter a tag name in the **Choose Tags** textbox for your reference and hit **Enter**. You can search templates using a **Tag** name
- **Category** – Select a category from the dropdown for your reference. You can search templates using the **Category**

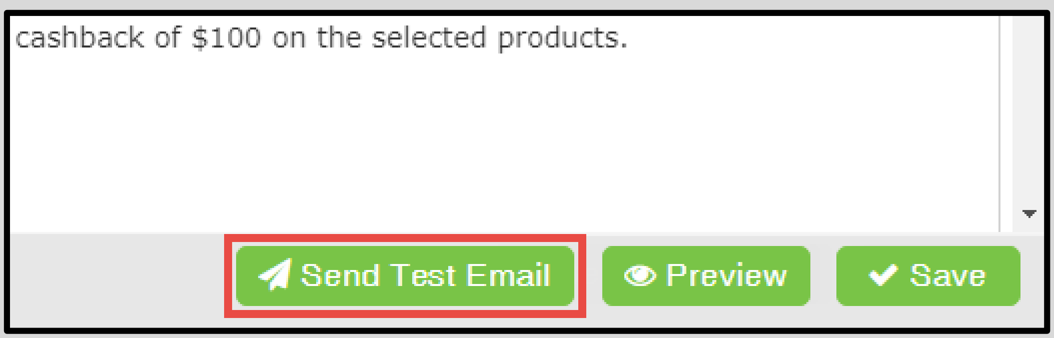


4. Click **Preview** to preview the email template.

5. Click **Save** to save the email template.

IMPORTANT NOTE

To ensure the email communication and template content are correct, you can send a test email by clicking the **Send Test Email** button in the **Edit Template** window (refer to **Edit an Email Template** section).



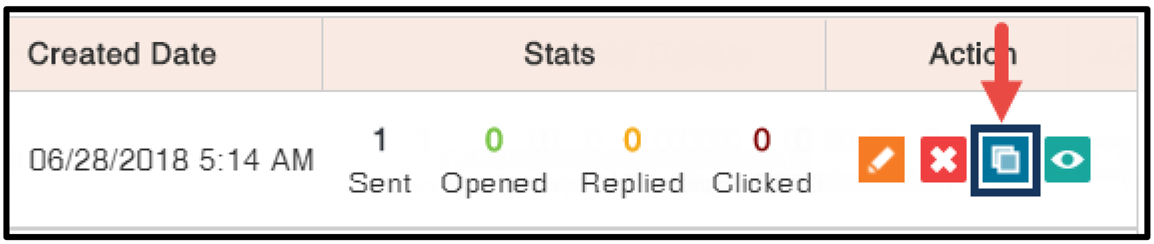
The **Send Test Email** button will **ONLY** be available after saving an email template, so you will not be able to find it in the **Add a Template** window.

10.2 Clone an Email Template

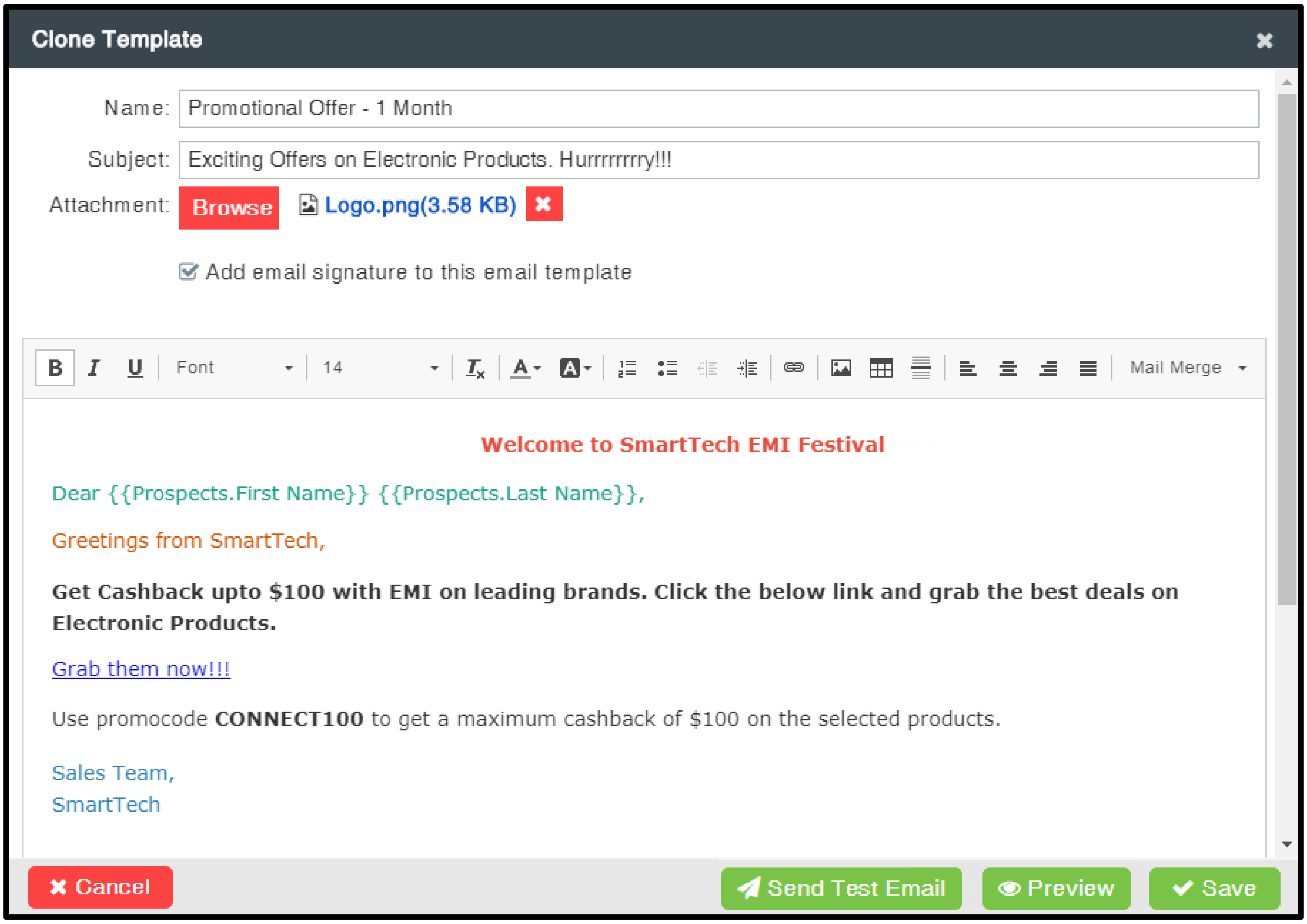
To make a copy or a similar version of an existing Email Template, use the **Clone Email Template** option. Remember, the **Name** of the Email Template cannot be the same as the original template.

Find the steps below to clone an existing email template:

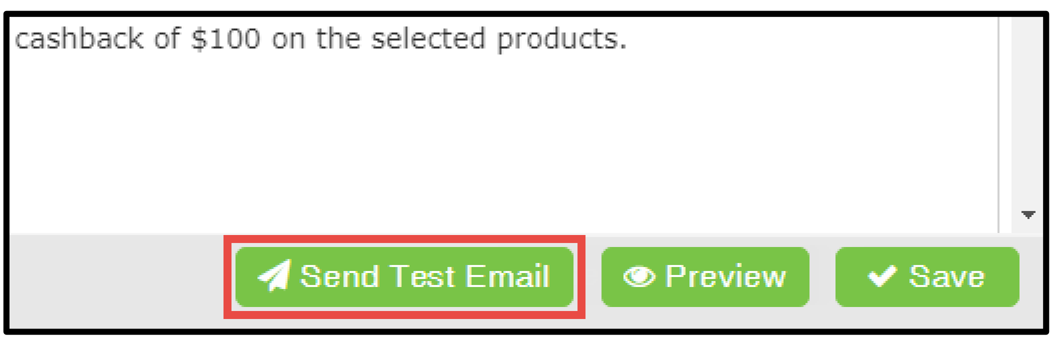
1. In **TruCadence ► Email Templates**, click on the **Clone Template** icon to the right of the template you wish to clone.



2. The **Clone Template** popup window will be displayed. It is mandatory to change the **Email Template Name**. Either you can save the template with the same content or you can make changes in the template.



3. Click **Send Test Email** to send a test mail to the registered email address (i.e. the email account from which the emails have to be sent to the prospects) configured under **Settings ► Email Settings** tab.



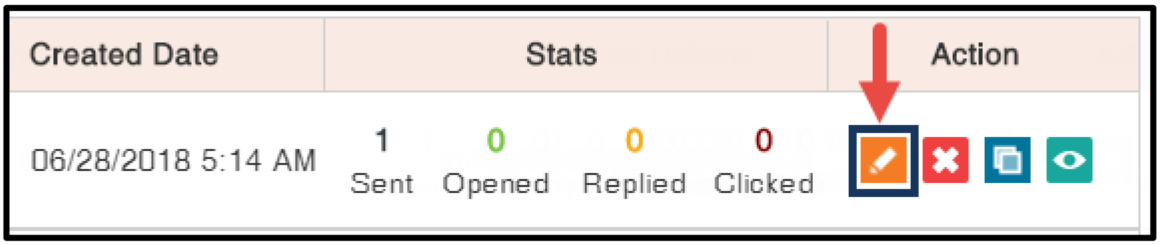
4. Click **Preview** to preview the template.

5. Click **Save** to save the template and the newly created template will be listed in the grid.

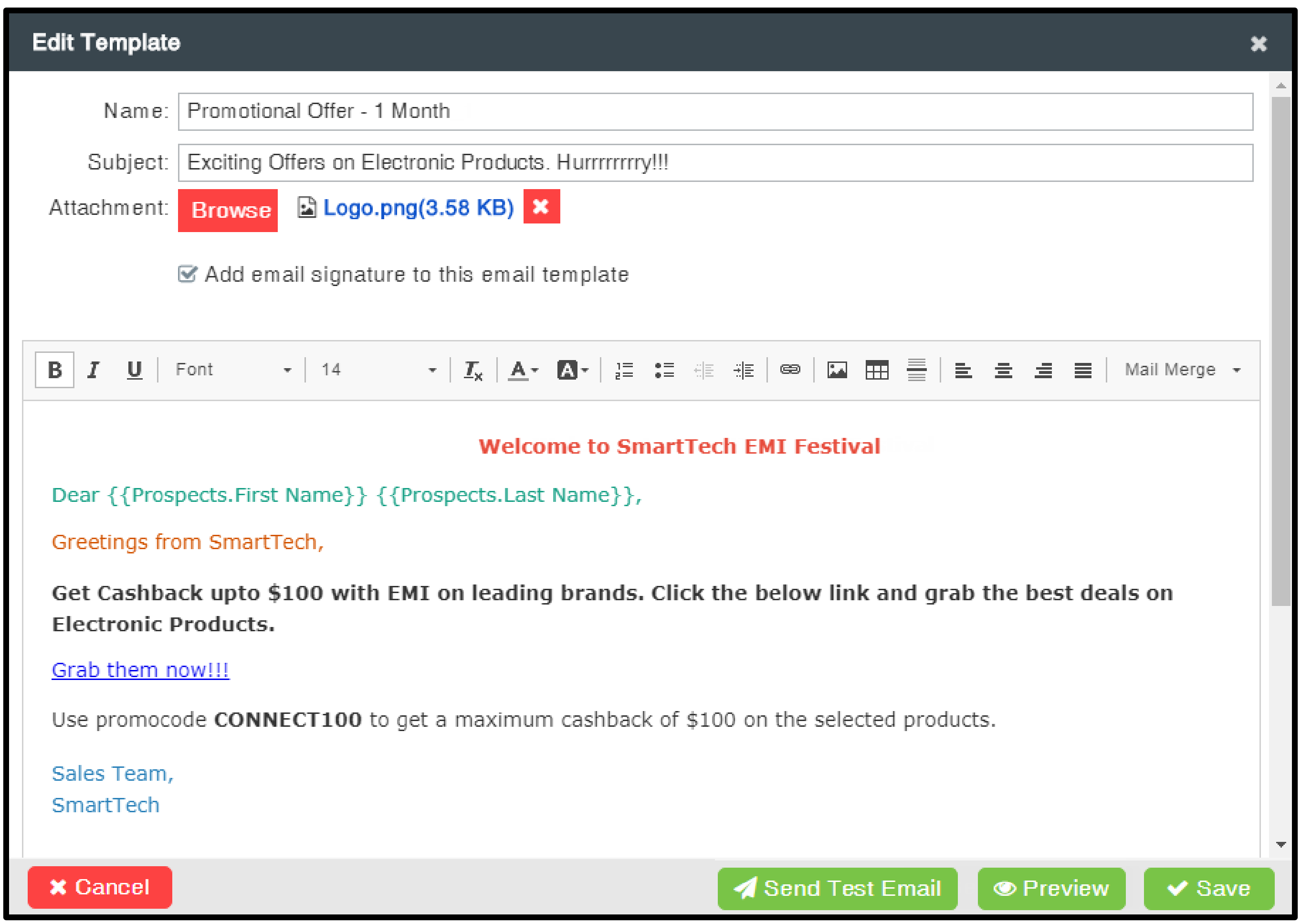
10.3 Edit an Email Template

Find the steps below to edit an email template:

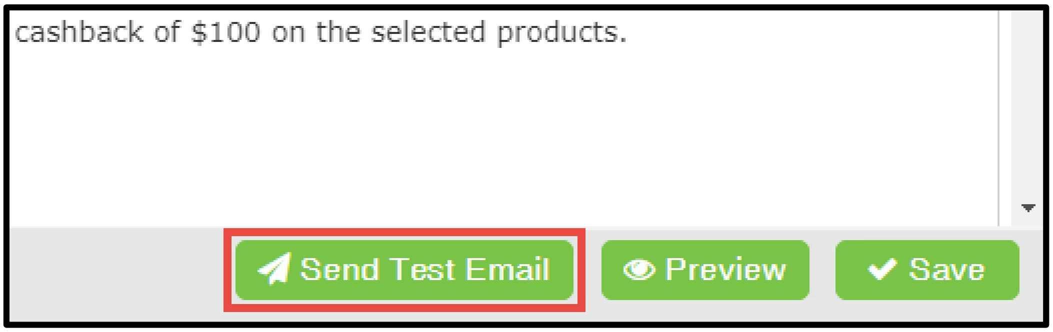
1. In **TruCadence ► Email Templates**, click on the **Edit** icon to the right of the Template you wish to edit.



2. The **Edit Template** popup window will be displayed. Make the changes as needed and click **Preview** to view the changes done.



3. Click **Send Test Email** to send a test mail to the registered email address (i.e. the email account from which the emails has to be sent to the prospects) configured under **Settings ► Email Settings** tab.



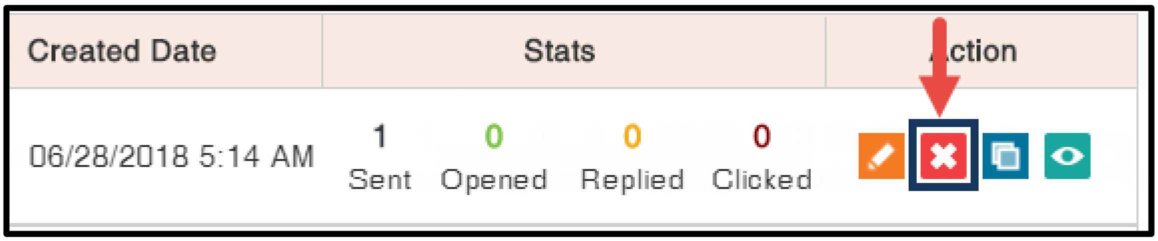
4. Click **Preview** to preview the template.

5. Click **Save** to save the changes.

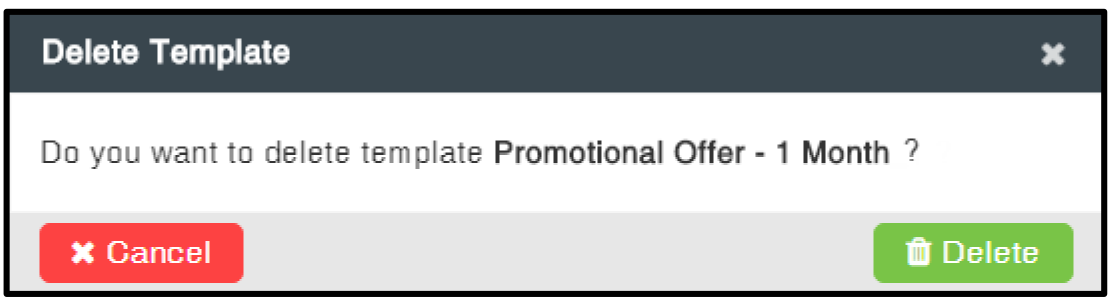
10.4 Delete an Email Template

Find the steps below to delete an email template:

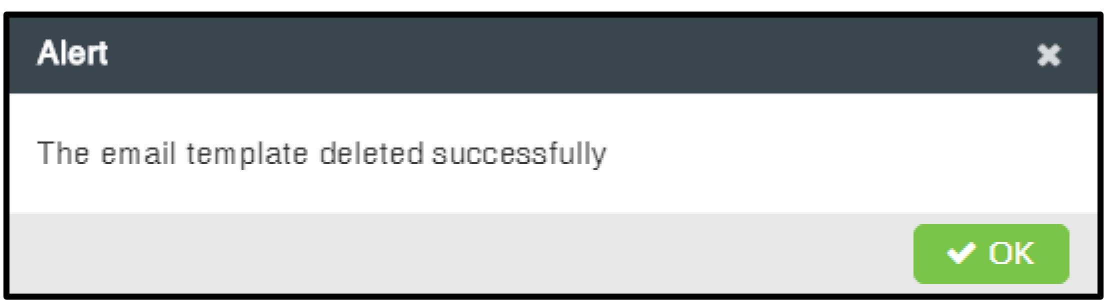
1. In **TruCadence ► Email Templates**, click on the **Delete** icon to the right of the Template you wish to delete.



2. The confirmation message below will be displayed. Click **Delete** to delete the template.



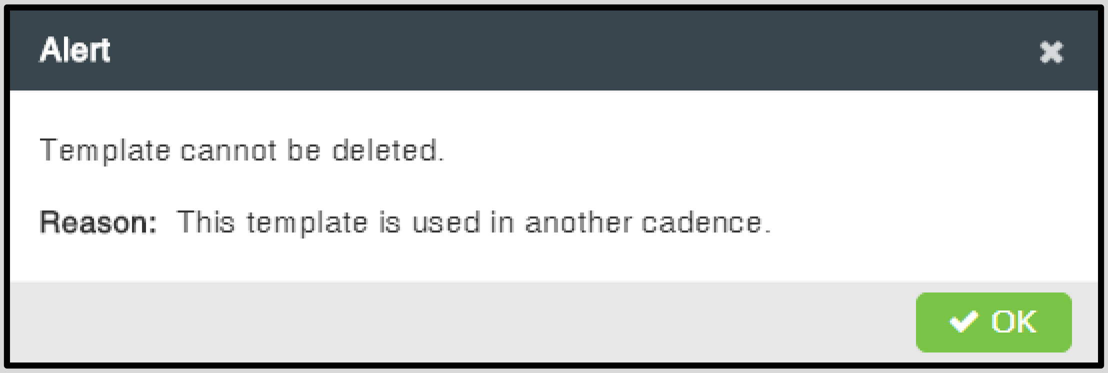
After successful deletion, an alert message will be displayed, as shown below:



Click **OK** to close the alert message.

IMPORTANT NOTE

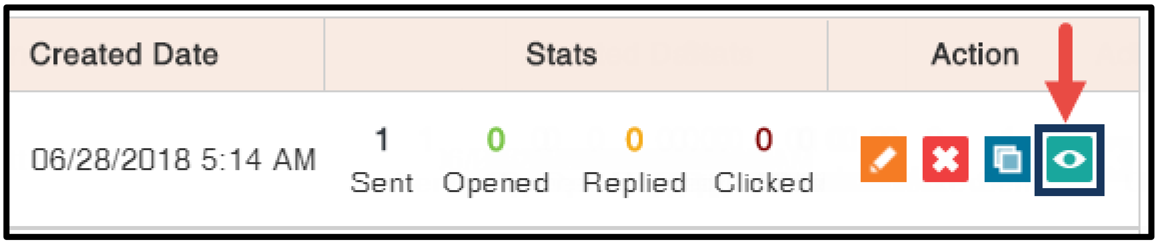
When deleting a Template that has been used by a Cadence, which is in **Active** status, the following alert message will be displayed and cannot be deleted. Click **OK**.



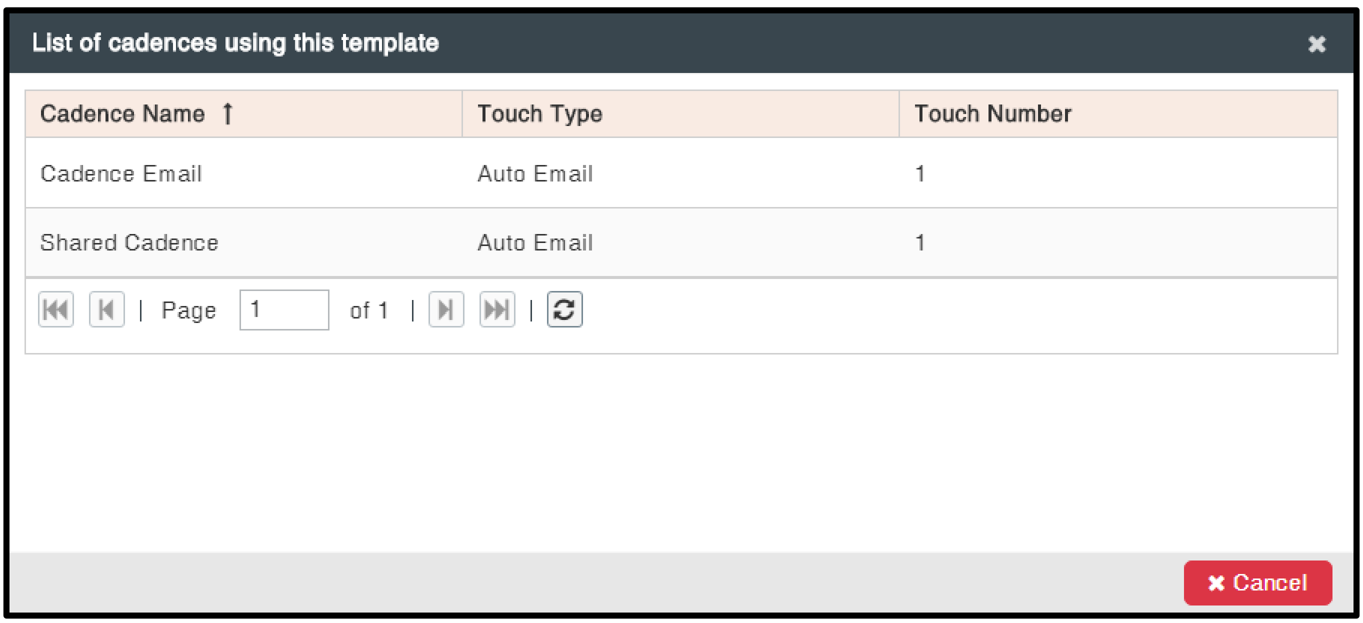
10.5 Cadences using an Email Template

Find the steps below to view the list of cadences using an Email Template:

1. In **TruCadence ► Email Templates**, click on the **View** icon to the right of the Template you wish to view.



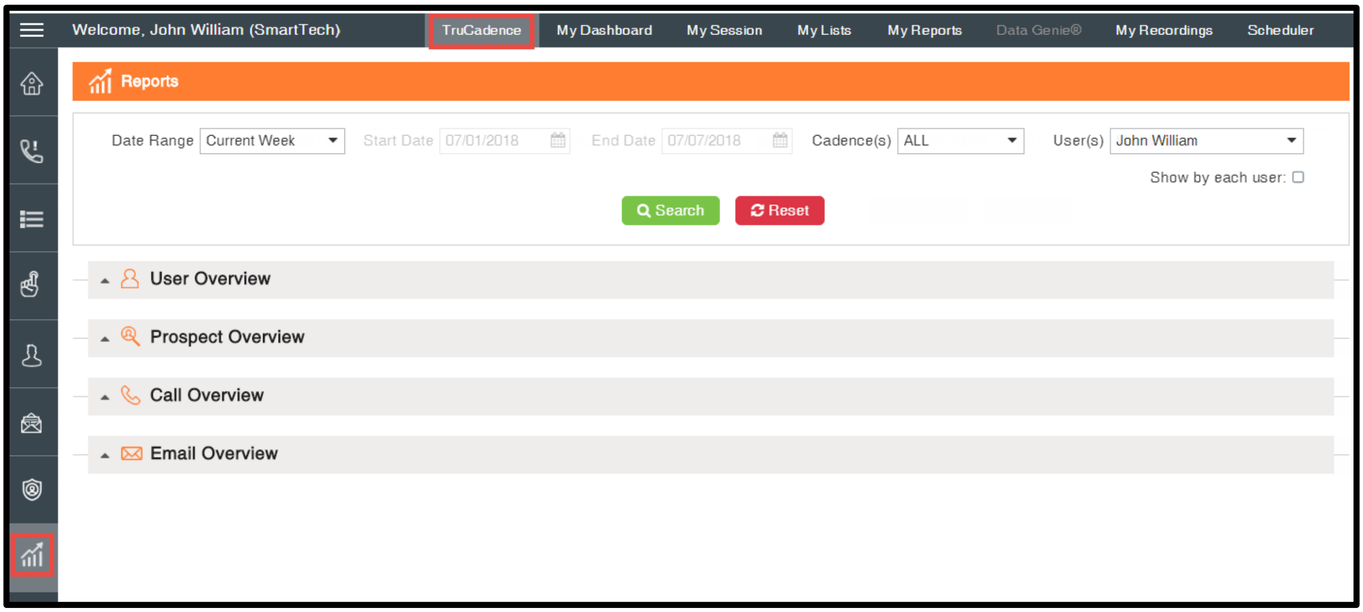
2. The **List of Cadences using this template** window will be displayed. Number of cadences that are using this template for **Email Touch** will be displayed.



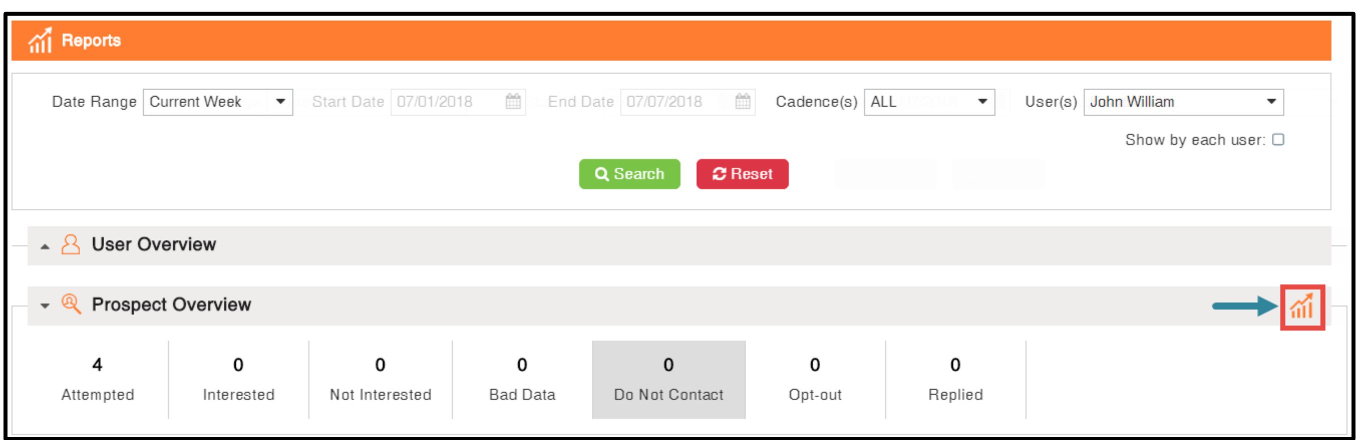
Chapter 11 – Reports

In the **Reports** tab, you can view the User Overview, Prospect Overview, Call Overview and Email Overview of your own cadence activities. Also, you can view the detailed information of the activities performed (Outcomes) by the Cadences which you have created.

Navigation	TruCadence ► Reports tab

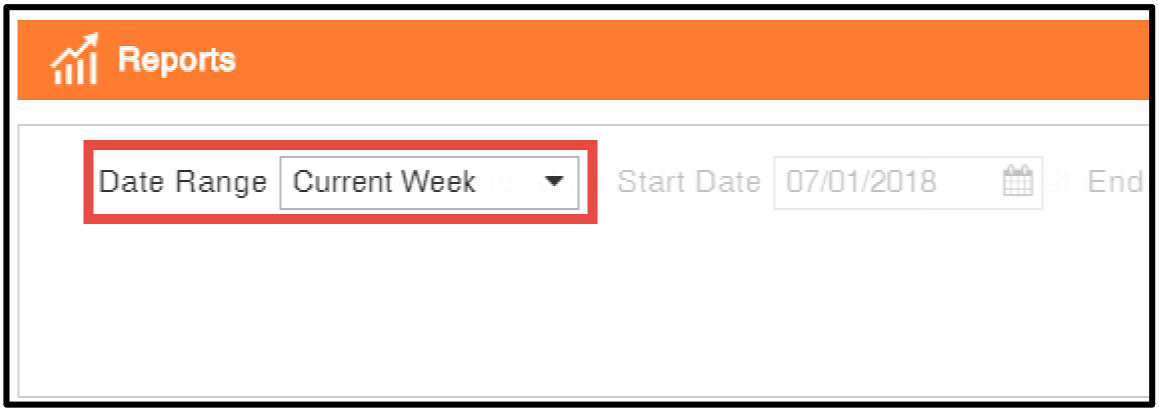


The **Show Graph** icon is available for each sections to view the reports in a **Bar Chart**.

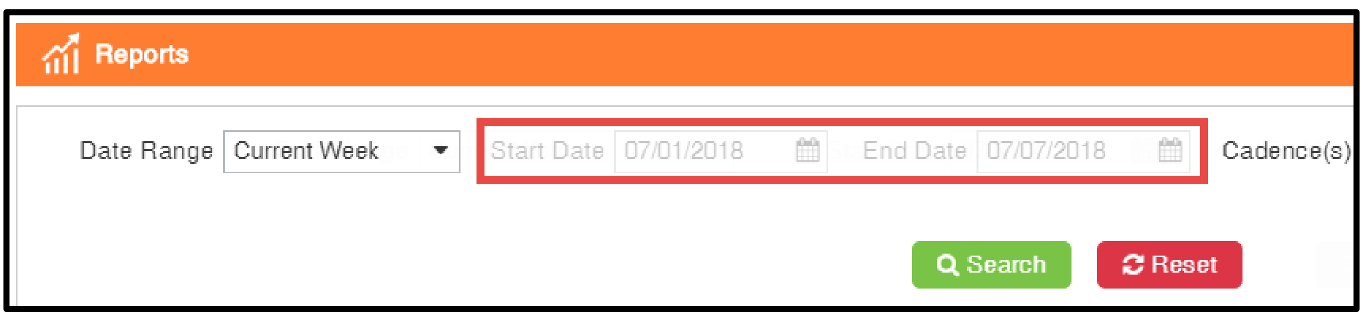


Find the steps below to view Reports:

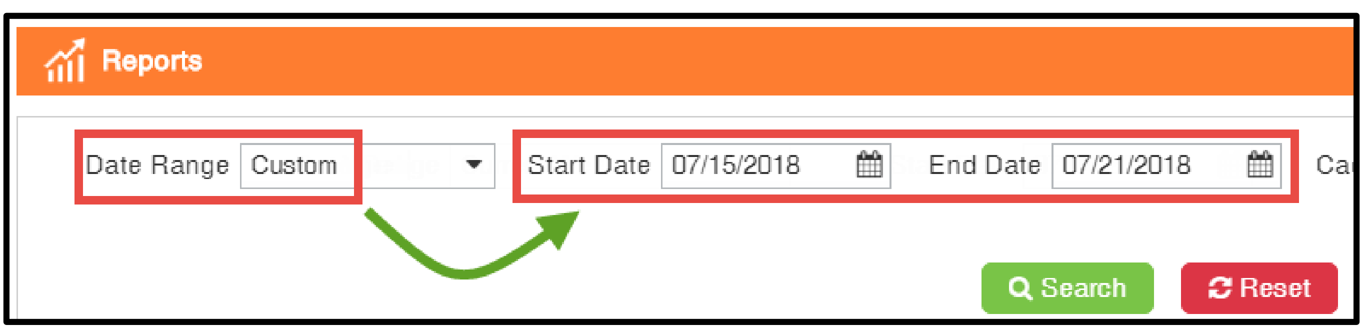
1. In the Reports tab, select the required **Date range** from the dropdown to view the **Reports** during the date range selected.



Based on the date range selected, the **Start Date** and **End Date** will be displayed, but cannot be edited.



NOTE: When **Custom** date range is selected, the **Start Date** and **End Date** fields will be enabled. Select the required start and end date using the Date Picker to view the reports.

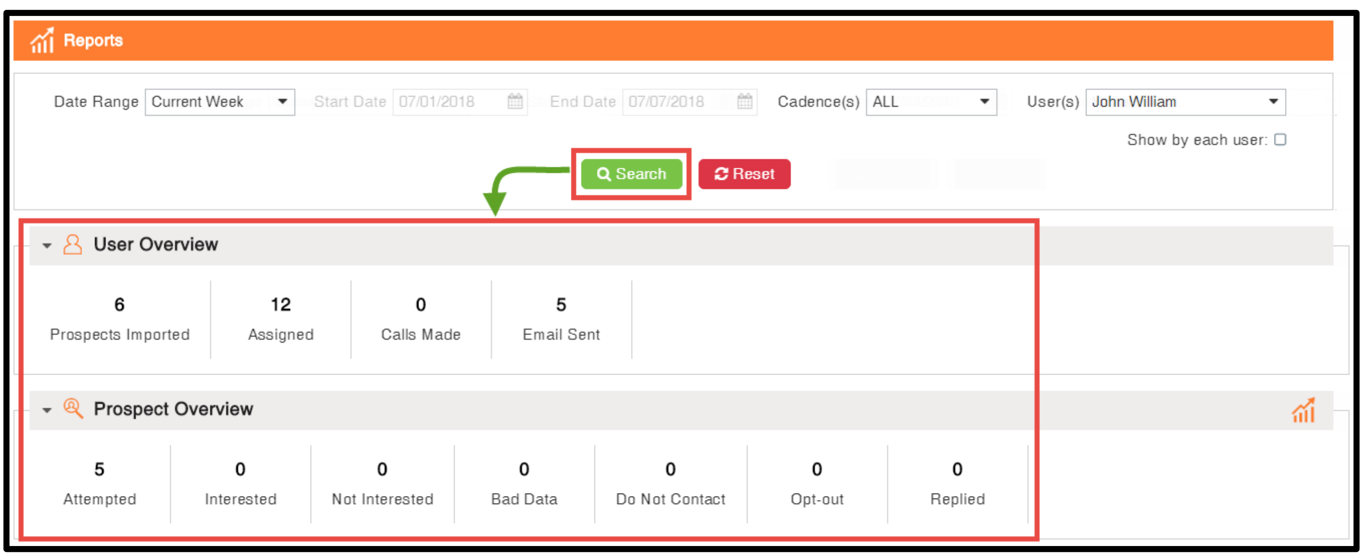


2. Select the desired Cadence from the **Cadence(s)** dropdown to view the reports. Defaults to the option '**ALL**'.

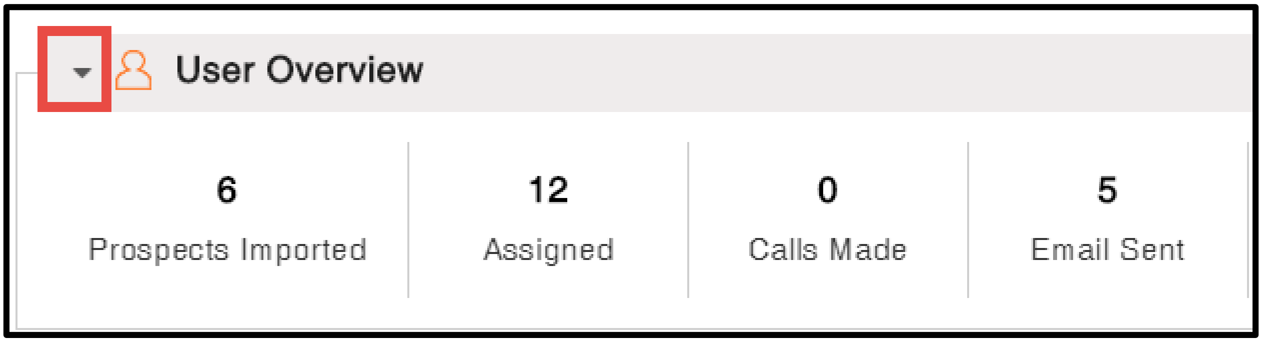
3. By default, the **User(s)** field will be displayed with your name (i.e. the logged in user name).

NOTE: The **Show By each User** checkbox is only applicable for Admin/Managers.

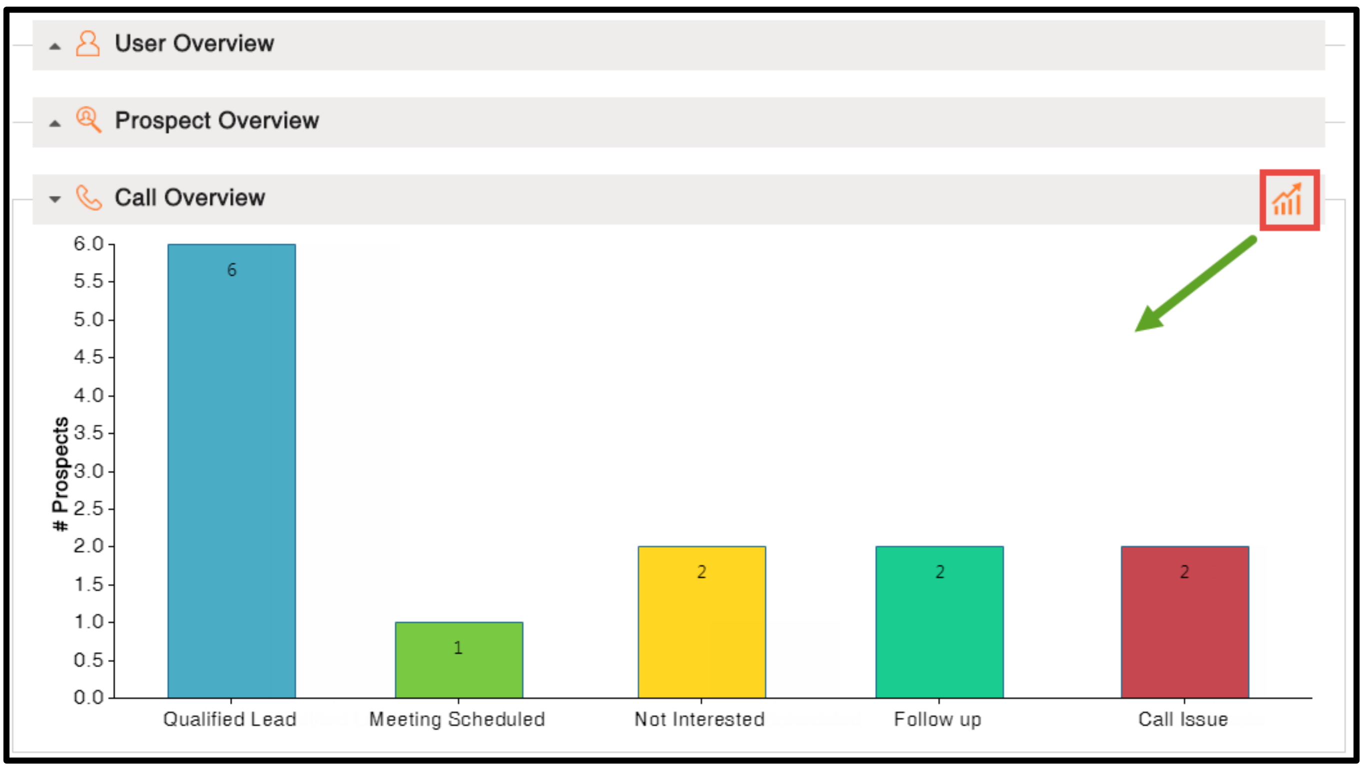
4. Click **Search** to view the report.



5. Click on the icon next to the report name to expand or hide the details of the report.

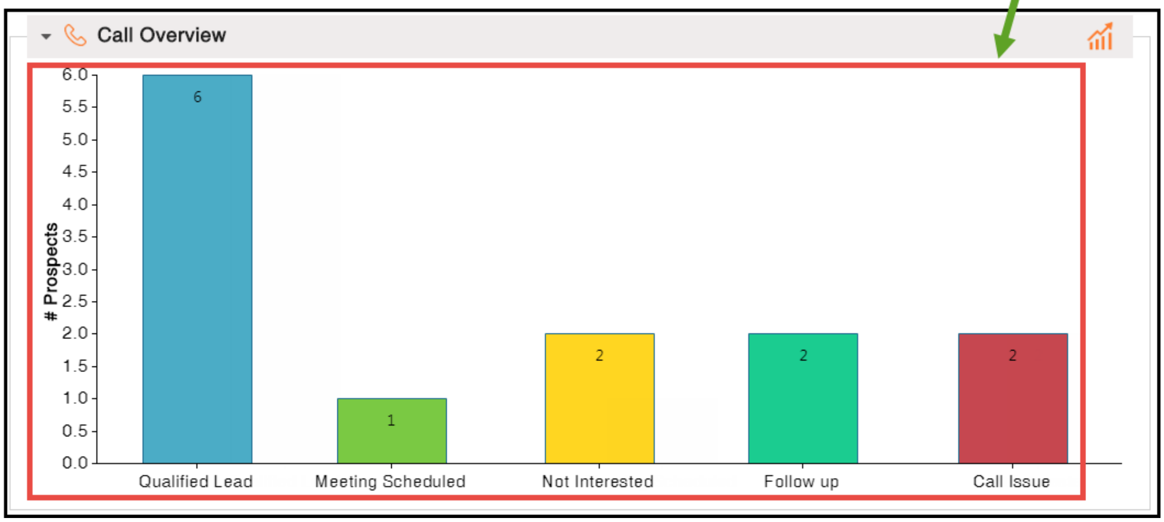


6. Click on the **Show Graph** icon to view the report details graphically (Bar Chart).



NOTE: On clicking the **Show Graph** icon, the grid view of data will be replaced with Bar Chart, as shown below. Click the **Show Graph** icon again to view the grid view.


User Overview
Prospect Overview
Call Overview
6
Qualified Lead
1
Meeting Scheduled
0
Got Referral
2
Not Interested
2
Follow up
0
Not a Decision Maker
2
Call Issue


Call Overview
Prospects
6.0
5.5
5.0
4.5
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
6
1
2
2
2
Qualified Lead
Meeting Scheduled
Not Interested
Follow up
Call Issue