



Getting Started / Setup

DataBees

Introduction:

Welcome to DataBees! This manual will help you get set-up on the different pieces of software that we use to make it possible to serve our customers to the best of our ability.

Following the guidelines here will make sure that all data is properly backed up and you will be able to switch to a different computer in no time, should it ever be required.

Your Email /Gmail:

We always do everything related to emails directly in gmail on <https://mail.google.com> and don't download emails into a local email client. You'll see the advantages of this later.

By now you should have received an email with login instructions. Please add a close-up picture, etc. as it looks good when we email people.

Your main email will be first@getdatabees.com. If you'll be doing cold email outreach you'll also get additional emails with different domain endings like first@godatabees.com, first@getdatabees.net and similar.

Important: do not use your main email for cold email outreach. We want to make sure the domain stays healthy and don't risk customers not receiving emails from customer support because the domain got a bad reputation or has been marked as spam a lot.

But **do use** the main email for slack, creating a chrome user, login to Asana, Trello, Helpscout and everything else.

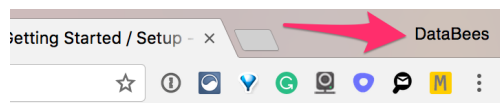
→ Add a close-up picture of you in gmail so that people can see a face and it's more personal.

Important - do this first: New Chrome Person

Create a new user in Chrome for "DataBees"

<https://support.google.com/chrome/answer/2364824?co=GENIE.Platform%3DDesktop&hl=en>

That way you can open a chrome window that is optimized for all things related to DataBees.



Sign-in with your own Google user (ie: tom@getdatabees.com). This will save your bookmarks, extensions, etc. when you switch to a different PC or Mac.

Shared Google

How to share the Google calendar with co-workers and view shared calendars.

- Calendar: <https://calendar.google.com/calendar/syncselect>

→ share your calendar with your co-workers

Important note about Google Accounts:

When downloading or using a platform, you will most likely be asked to login or create an account. When this happens, you will be provided with different options such as: Connect with Facebook/Linkedin, Connect with your Google Account or create a new account using your email address and setting a password.

It is very important to remember to always create a new account using the email address and NEVER use connect with the google account option.

Create an account with SimilarWeb

Join thousands of organizations already using SimilarWeb to win their market.

[Connect with Google](#)

[Connect with LinkedIn](#)

First Name

Last Name

Work Email

Password

Already have an account? [Login](#)

NEXT

As you can see in the above picture, on the left side of the screen you have the option to connect via already existing accounts (always to be avoided) and on the right side of the screen, the option to create new credentials (the correct choice).

The reason behind this is that your Google account is linked to all the information you work with on a daily basis and upon it's connected with a new app, it might allow it to access confidential folders and data, a thing that we should avoid by all means.

OneTab Chrome Extension:

Install the OneTab chrome extension:

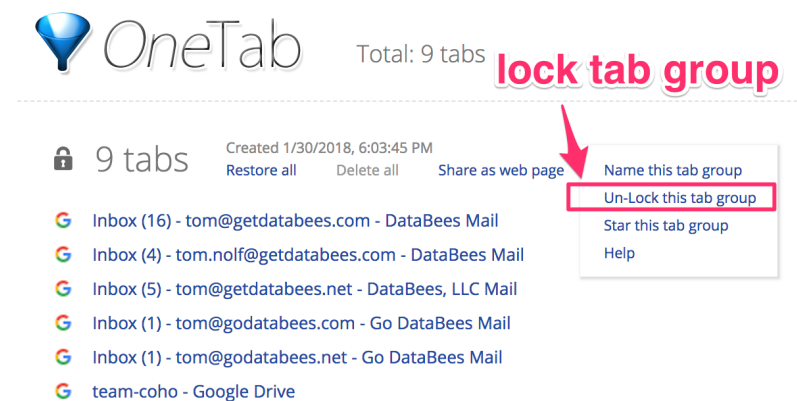
<https://chrome.google.com/webstore/detail/onetab/chphlpgkkbolifaimnlloiipkdnihall?hl=en>

Make sure you are using the "DataBees" Chrome user.

This extension is useful so that you can save all tabs and open them later again (especially with all those mailboxes).

When you have all your mailboxes open in different tabs, click on the OneTab icon and it pulls all tabs into a single window. Now click on "more" and "lock this tab group".

Whenever you close your browser windows and you open it again, it will show you this page and you can just click on "Restore All" and it will open all the tabs in the right order again. You can add also other tabs to it that you use all the time.



Grammarly Chrome Extension:

Install the [grammarly chrome extension](#) and create a free account. Make sure you check the suggestions of grammarly before you send off any emails to customers, prospects, or partners. Also check instruction documents, etc. with grammarly.

Grammarly works in Google documents and gmail, but there is also a free desktop app that is very convenient to draft text that is later used in any other tool. If you are a non-native English speaker, definitely check it out and use it!

Hemingway App:

If you are emailing to prospects or you tend to write long, complicated emails or texts, use this website to check your copy: <https://hemingwayapp.com/>
It gives you feedback and makes suggestions. If you use it a lot and would like to have the desktop version let us know and we'll buy a license.

Language Settings:

Operating System (Windows, Mac, Linux)

Change your Operating System language to US-English so that all apps and tools are in English language including the system spell checker.

LinkedIn

Make sure your LinkedIn Profile is in English language, at least the profile summary and current job description.

Communication

All written communication internally, with prospects and customers must be held in English. It must be possible for someone to share any Email, chat message, screenshots, etc. and anyone else at DataBees must be able to read and understand it.

1Password:

Install 1password and its chrome extension (invite link in your mailbox).

Store all your passwords (gmail, slack, outreach, etc.) and everything going forward in 1password so that you have a backup.

Download 1password Mac App and browser extension.

→ If a user has been set up for you already, change the master password to something a) you can easily remember because you have to type it a lot and b) really strong (ideally upper/lower case, numbers, and special characters). Some ideas here:

<https://www.becybersafe.com/passwords/password-ideas.html>

For any new tool or app that you need to use a password for, always use the password generator of 1Password. In the end, those passwords should be secure and unique and since they are saved in 1Password you don't have to remember any of them.

In order not to lose your info in the 1Password account, when logged in, download the Emergency Kit. Go to your profile and download it as a PDF file. Then print it. With this, you'll always have access to your account.

Slack:

Download and install the Slack App on your PC/Mac (invite link in your mailbox). There is also an iPhone/Android version.

When you signup, only use your first name and use proper casing. Joe instead of joe.

Add a close-up picture of you to your profile and set the correct timezone in your profile.

Simple rule: when you are working, be online in Slack. If you are not, be offline in Slack.

Since we are not all sitting in the same office and are in a number of different time zones this is very important. People need to know if someone is working and if they can expect a reply or not.

Extensity Chrome Extension:

For future usage: install the extensity Chrome Extension:

<https://chrome.google.com/webstore/detail/extensity/ijmflmamggggndanpgfnpelongoepncg?hl=en>

It allows you to activate / deactivate chrome extensions quickly. So you can install various other extensions but if you don't need them all the time they can slow down your browser. With this extension you can activate / deactivate them quickly.

Outreach (only required for sales):

Login to outreach here:

<https://app1a.outreach.io/360>

User and Pass are shared in 1Password. You might also have received an invite and can set it up yourself.

Install the outreach chrome extension:

<https://chrome.google.com/webstore/detail/outreach-everywhere/chmpifjifpeodjljjadlobceoiflhdid?hl=en>

Again, make sure you are using the Chrome User "DataBees".

Outreach Emails Sync

Within outreach, go to settings and connect your gmail with outreach so that emails get synced.

https://app1a.outreach.io/users/6/mailboxes/18

Settings

Users / sara@getdatabeers.com

General Advanced Save

USER ADMIN

- You
- Org
- Teams
- Users
- Roles
- Profiles

SYSTEM CONFIG


- Schedules
- Rulesets
- Validations

AUTHENTICATION

Email Provider: Gmail API (recommended)

Email: sara@getdatabeers.com

This is the email you'll be sending and syncing from.

Connect:  Connected to sara@getdatabeers.com disconnect

Click on the button to sign in with your Google account.

SENDING AND SYNCING

☒ Enable sending messages from this mailbox.

☒ Enable syncing messages from this mailbox.

SIGNATURE

Email Signature:

Customer Success

A

As per CAN-SPAM guidelines, you are required to include a physical address in your unsolicited emails. We strongly recommend you place this in your signature to ensure it is included in every email sent.

https://app1a.outreach.io/users/6/mailboxes

Settings

Users

General Mailboxes Calendar Outreach Everywhere

sara@getdatabeers.com Default SEND SYNC Set up account

Outreach Calendar Sync

Configure your outreach similar to what is in the screenshot below so that your calendar gets synced with outreach:

https://app1a.outreach.io/users/6/calendar

Settings


Users / Sara Burns

General Mailboxes **Calendar** Outreach Everywhere

Setup

Calendar Sync

Connect your calendar to book meetings from Outreach.

Connected to  **sara@getdatabe.com**

Public Calendar URL

Your personal link prospects can use to book meetings.

<https://databe.getoutreach.com/c/Sara>

Copy URL

Default Meeting Type

The default meeting type used when a prospect books a meeting on your public calendar.

30 Minute Meeting

Conference Info

Use for meeting conference links, dial-in phone numbers and access codes.

Conference URL:

Scheduling

Time Zone

Your default calendar time zone

(GMT+02:00) Madrid

Availability

Prospects will only be able to schedule meetings within the time blocks listed below. They cannot double book a meeting.

Sun

Mon

Tue

Wed

Thu

Fri

11am - 8pm

11am - 8:30pm

11am - 8pm

11am - 8:30pm

11am - 6pm

your timezone

select the time slots people will be able to schedule a meeting with you

short - only first name, for example

https://app1a.outreach.io/users/6/calendar

Settings

Users / Sara Burns

General Mailboxes Calendar Outreach Everywhere

Conference Info

Use for meeting conference links, dial-in phone numbers and access codes.

Conference URL:

www.uberconference.com/sara_db

Conference Details:

Join here: www.uberconference.com/sara_db
or
Conference line 781-448-4926 PIN: 09152

your uberconference details

pick something that works for you. ie: 3 hours or 10 if you want to make sure you know ahead of time

Restrictions

Meeting Notice

Prevent prospects from scheduling meetings without enough notice, or too far in advance.

Minimum scheduling notice:

3 Hours

Maximum scheduling notice:

2 Weeks

Meeting Buffers

Add rest time to new meetings created by prospects to prevent people from scheduling back to back meetings.

Buffer before meetings:

30 minutes

Buffer after meetings:

30 minutes

don't allow scheduling ahead for more than 2 weeks

Other

- ☒ Include reschedule link in meeting invites
- ☒ Prevent other users from double booking on this calendar

HelpScout (only required for account managers):

You should have received an invite to helpscout in your gmail. Finish the setup.

Look around on helpscout and read / watch intro videos and materials on how it works and how to use it. Starting point: <https://docs.helpscout.com/article/1068-getting-started-video-tour>

Trello (only required for account managers):

Go to trello.com and create a user with your work email (ie: tom@getdatabees.com). If it suggests a username, change it to firstname_db like tom_db. You might have already received an invite via email.

Install the App for Mac or Windows as well.

Asana (only required for account managers):

Sign up for a user on Asana com with your work email. Or you might have already received an invite in your gmail.

Google Calendar

The following settings in Google calendar help with timezones:

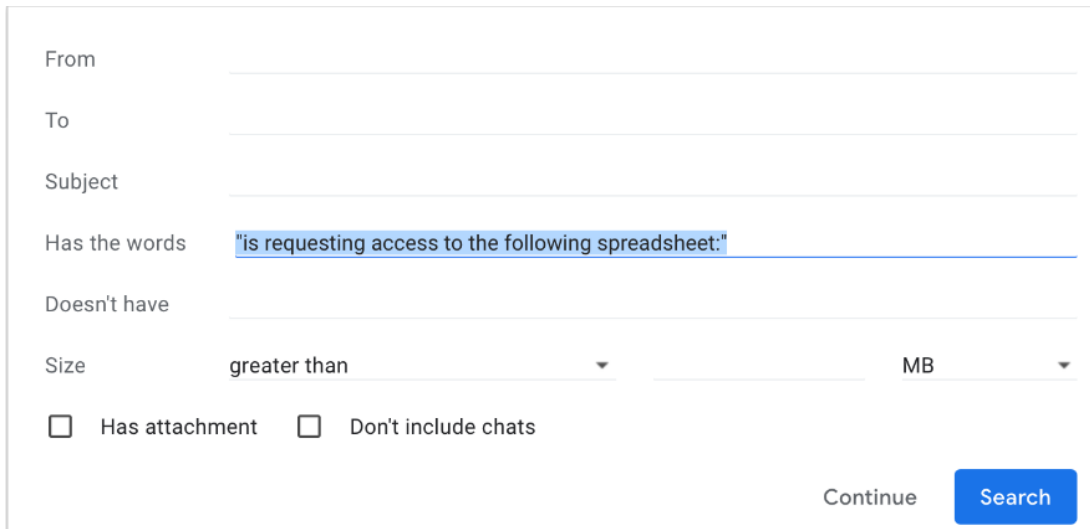
Forward to HS setting in the Gmail account:

When creating a Google Doc or Spreadsheet, some users or customers might need to request access to view it. To make sure that the access can be granted even when the user who created the doc is offline, we need to make sure that the Requesting Access Email is forwarded to our general Inbox in Helpscout.

Forwarding Rule for Request Access Emails

1. Go to “settings” in your Gmail inbox (top right corner)
2. Go to “Forwarding and POP/IMAP” and select “Disable Forwarding”
3. Go to “Filters and Blocked Address” in the toolbar across the top of the settings screen.
4. Choose “Create a new filter”
5. Type the following in the below section. See screenshot below.

Has the words: **"is requesting access to the following spreadsheet:"**



From

To

Subject

Has the words **"is requesting access to the following spreadsheet:"**

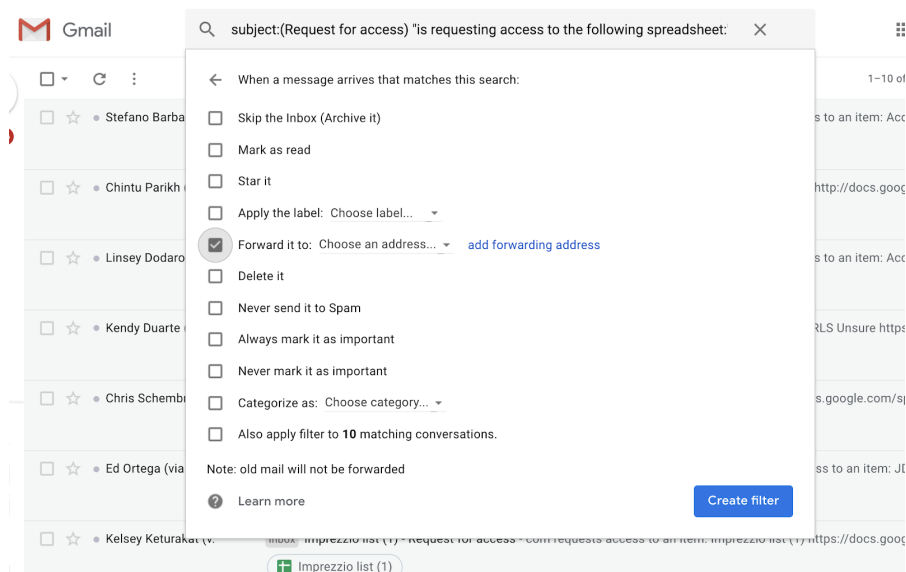
Doesn't have

Size greater than MB

☐ Has attachment ☐ Don't include chats

Continue Search

6. Choose “Create filter” and then “Ok” on the pop up.
7. Check the “Forward to” checkbox and add a forwarding email address hello@getdatabees.com.



8. Click ok, and you will see the screen below confirming the update has been made.

Settings

General
Labels
Inbox
Accounts
Filters and Blocked Addresses
Forwarding and POP/IMAP
Add-ons
C

The following filters are applied to all incoming mail:

☐ Matches: **subject:(Request for access) "is requesting access to the following spreadsheet:"**
Do this: Forward to hello@getdatabees.com

Select: [All](#), [None](#)

ExportDelete

Create a new filterImport filters

The following email addresses are blocked. Messages from these addresses will appear in Spam:

You currently have no blocked addresses.

Select: [All](#), [None](#)

Unblock selected addresses

0.23 GB (0%) of 30 GB used
Manage

Program Policies
Powered by Google

It should be set up like this:

Forwarding:
[Learn more](#)

☒ Disable forwarding

☐ Forward a copy of incoming mail to and

[Add a forwarding address](#)

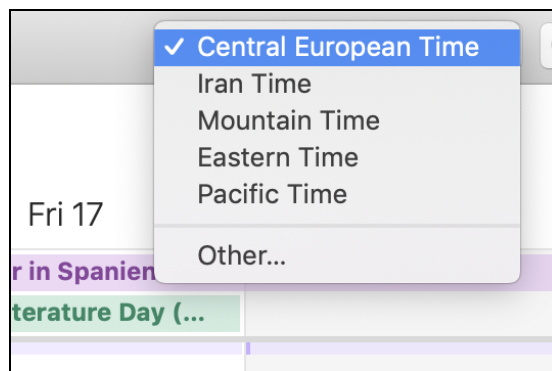
Tip: You can also forward only some of your mail by [creating a filter](#)!

Make sure to HIT SAVE! This is at the bottom of the screen when you are enabling forwarding under “Forward and POP/IMAP”.

Mac Calendar:

If you prefer to work with your Mac calendar make sure it is set up to sync with your Google calendar.

It's very useful to configure it to work in different time zones. It helps you book the right times and if you send calendar invites to customers / prospects from within the Mac calendar make sure you switch your timezone before you create the event so that the recipient sees the time in his/her own time zone and not ours.



If you want to view a calendar shared by another team member with you, you have to take some extra steps in order to see their events in your Mac calendar.

First request calendar access:

<https://calendar.google.com/calendar/r/settings/addcalendar>

Then add the shared calendar to Mac sync

<https://calendar.google.com/calendar/syncselect>

Profile Pictures

Upload your head-shot image on the following tools/apps:

- Gmail
- Slack
- Uberconference
- Trello

- Asana
- And any other tools that we might use where it makes sense.

Outreach.io Intro (only for sales)

Note: most parts like sequences, tasks, follow-ups, etc. are mainly interesting for people who do sales / email outreach. But we started using outreach also as our CRM and so everyone should be familiar with the basics and how to check activities, conversations, status, etc..

They have pretty good material on their webpage to get started:

<https://university.outreach.io/>

I am not familiar with their new courses. Earlier they had websites and howtos there which were quite good.

I think to get started I would look at "Getting Started with Outreach":

<https://university.outreach.io/getting-started>

And "Basics of Outreach":

<https://university.outreach.io/basics-of-outreach>

I think these are good starting points as well if you prefer reading vs. watching:

<https://support.outreach.io/hc/en-us/articles/115000426113-Start-Here->

<https://support.outreach.io/hc/en-us/sections/115000122193-The-Basics>

<https://support.outreach.io/hc/en-us/sections/115001130313-Outreach-Everywhere>

Just look through the docs a bit to get more familiar with it. No need to read the stuff about configuration, setting up mailboxes, etc. as we did that already. While you go through the documents you can login into our outreach account and look around. If you want to try things out, just create a prospect in your name. That way you can try things out with your own user without emailing customers :)

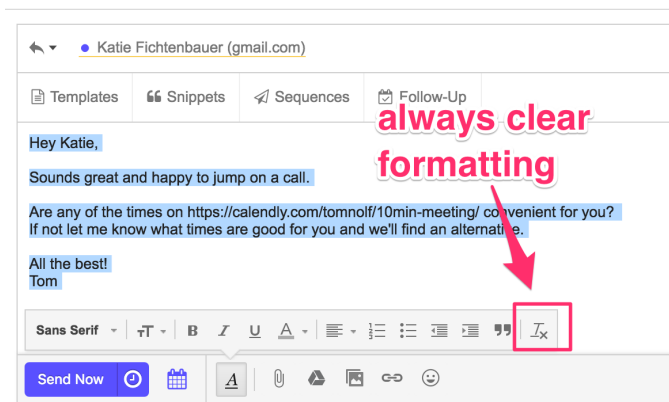
There is an outreach operating manual that you should check out. It contains a lot of useful info on how we use it internally and which standard procedures we follow.

Outreach Chrome and Gmail Notes / Tricks:

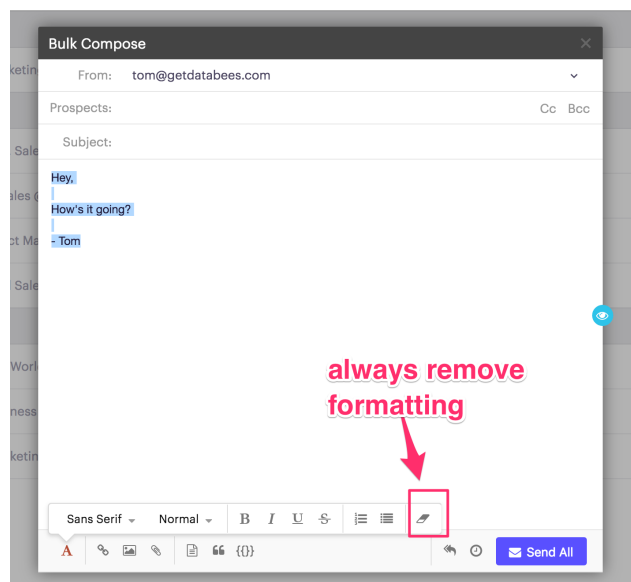
Always remove Formatting if you use templates

When using snippets or templates in outreach or in the outreach everywhere plugin for gmail. Whenever you use pre-defined text make sure you remove any formatting before you send an email. Sometimes there is a slightly different font that you don't even notice but once you get a reply back from a customer and they use a different email program you see that it looks like a copy&paste email that we sent off.

Gmail:



Outreach:



Snippets:

Create your own snippets in Outreach.io starting with prefix (ie: "KK - ") of texts that you use often. Feel free to use my snippets that I already created but note that I almost never use a snippet right away but always fine-tune or adapt it a bit to the situation. And I tend to always find some mistakes and Germanized parts in it that I fix.

Sequences:

... More in the Outreach Operating Manual.