Person 1: In Midas, what's the difference between a Loan and a Payment Plan? Can I do both?

Person 2: If you select "loan only" when creating a checkout link in Midas, it will not give the prospect a payment plan on the backend. However, if you don't select any of the advanced presets, Midas will take them to the loan application first and then to the payment plan automatically if no offers are found. The default terms for the payment plan are 60 months. So, yes, you can do both.

Person 1: Does Midas integrate into my website? Or would it be a separate entity that I log onto during the sales call and from which I then send a checkout link to the prospect?

Person 2: Midas is its own portal, so you would log onto it during the sales call and send a checkout link to the prospect from there. However, if you want to embed it in the checkout page on your website, you can do that as well.

Person 1: If someone gets pushed to inhouse financing, does that mean they got rejected by all other offers, or does inhouse always present itself even with offers from the bank?

Person 2: If someone is pushed to inhouse financing in Midas, it means that they were not able to secure funding from other sources. However, inhouse financing is always presented as an option, even if offers from banks or other sources are available.

Person 1: Can I put both B2B and B2C prospects through the same funding platform?

Person 2: Yes, as long as they are using their SSN for funding. It means they would be taking out a personal loan rather than a business loan, which is a much lengthier process requiring additional documents and review processes.

Person 1: Can Midas do business funding?

Person 2: No, Midas currently does not offer a way to utilize business credit within the Midas system. A good resource that we have used in the past for business funds would be snapcap.com. However, business funding solutions will be coming to Midas soon.

Person 1: If a customer is set up on a Midas payment plan, does that impact their credit?

Person 2: No, there is no credit impact for payment plan applications unless they miss a payment.

Person 1: Does Midas fund international clients?

Person 2: No, Midas financing services only currently serve US-based prospects. International prospects will not be able to use Midas financing as they would need to enter a Social Security Number (SSN), which is only available to US residents.

Person 1: So I don’t have to wait 12 months to get the full payment?

Person 2: Correct, the loan company waits the full term, typically 12 months, to recoup the loan, but you will be paid upfront.

Person 1: What is the minimum credit score required for financing through Midas? Is a score in the 600s too low?

Person 2: The minimum credit score required for financing through Midas is 650 to get some offers, but the majority of offers will come in around the 700 range.

Person 1: When are the Midas tech support calls?

Person 2: The Midas tech support calls are held every Tuesday and Thursday from 1:30 PM MST to 2:30 PM MST. You can access the link for the calls at https://www.air.ai/meet/midas.

Person 1: Is there a downloadable version of the Midas training that I can share with my team?

Person 2: No, we do not have the Midas training videos available for download to prevent them from being sent out in mass without our approval. However, we can add each of your team members to AirU free of charge. Just provide us with their email addresses in Slack.

Person 1: How do I schedule a Midas demo with Noah?

Person 2: You can schedule a Midas demo with Noah by using the link https://api.leadconnectorhq.com/widget/booking/N3G7tsAZancE2M3jpkSE.

Person 1: How do I add a new user to my Midas account?

Person 2: You can add a new user to your Midas account by following the step-by-step instructions provided in this Loom video: https://www.loom.com/share/4bd818749b1049349f1c3812c0d60bc3.

Person 1: How do I change my bank account information in Midas?

Person 2: To change your bank account information in Midas, you will need to update your bank account information in your Stripe account. Midas deposits funds into Stripe, and Stripe deposits the funds into your bank account.

Person 1: Is Max a CRM?

Person 2: No, Max is the dialer that uses purchased and cleaned phone numbers to dial out your leads. Max is then integrated with GHL, and GHL is the CRM system.

Person 1: Do I need my own GHL account?

Person 2: You can use your own account if you wish, as this will come with your own GHL support, which can be helpful. If you would rather, you are able to use a GHL sub-account we create for you.

Person 1: Is Max white-labeled GHL? Or white-labeled anything?

Person 2: No, Max is not white-labeled GHL or anything else. The Max application itself, that is the actual dialer, is built entirely by Air. We offer an integration with GHL to provide as much flexibility as possible for our customers. If you'd prefer to use a different CRM or your own GHL account, we can set that up for you.

Person 1: Are you guys giving us access to Go High Level? I thought a CRM was part of the program.

Person 2: Yes, we do give you access to a sub-account under our GHL with all our templates/structures. However, using GHL is completely optional, and you can use a different CRM or your own GHL account if you prefer.

Person 1: How can I track the progress of my Max/Midas onboarding?

Person 2: You can check your unique ClickUp Link for real-time updates. If you haven't saved it to your browser's bookmarks/favorites yet, reach out to us on Slack, and we'll send you the link.

Person 1: When do I receive the signup links for Max and GHL?

Person 2: If you wish to use the included GHL CRM account that comes with Max, then Signup Links get sent out when you complete your Max Onboarding form. For Max signup links, they get sent out after you complete your Max Onboarding form.

Person 1: How do I reset my password for Max and GHL?

Person 2: Password resets for both Max and GHL are handled from the login page of each respective platform. Just click "reset password."

Person 1: How long does it take to gain access to Max?
Person 2: It takes 5-7 business days depending on processing system turnaround times, provided you have a registered EIN and all information is correctly provided in the start.air.ai form.

Person 1: I don't have an EIN. Should I get one?

Person 2: Yes, in order to get the Twilio profile accepted, we do need some kind of business ID number like an EIN number or DUNS number associated with the business. If you don't have any of those, we can send you some resources on the best way to get one. Please tag Lexi for those resources.

Person 1: How do I apply for an EIN?

Person 2: You can apply for an EIN using this link to the IRS form. Once you submit your application, please send a message in your Slack channel tagging @Mike Maddix, @Ahmed Attar, and/or @Lexi Kingan, with your newly applied for EIN number, legal business name, and the address you used to register it, so we can make note of it in our records.

Person 1: How long does it take to receive a registered EIN?

Person 2: Obtaining your initial EIN can be an immediate process if applied online. However, it has to be officially registered by the IRS before it can be used and confirmed for verification purposes, which can take anywhere from a few days to a couple of weeks. Max access will be delayed until that EIN can be verified, but Midas will not be impacted.

Person 1: Can I use my SSN in lieu of an EIN?

Person 2: No, in order to onboard into the Max software, we do need a registered EIN.

Person 1: I'm done with the Max form, but I need help setting things up. Can you assist me?

Person 2: Sure! Once you're live in Max, @Mike Maddix will send you some helpful steps. In the meantime, you can go to Section 10 in the course (AirU) to get a head start on Max.

Person 1: I want to integrate with GoHighLevel. What are my options for account creation?

Person 2: There are two options for integrating with GoHighLevel. Option 1 (which will be deprecated upon V2 launch) is to sign up for a free/included Air GHL sub-account, but it won't have agency features. If you filled out your onboarding form, a GHL account is likely already created and the credentials are in your email inbox. Ping us otherwise. Option 2 is to integrate an existing/paid GHL agency account.

Person 1: How do I integrate my existing/paid GHL agency account?

Person 2: Please add ghl@air.ai as an admin user to your GHL account at an agency level. Here is a video to help guide you through the process. Next, it may ask you to set a password for our access, so if it does, please include that password in your reply along with your login link to your GHL account (this is just the link you go to to login/access your GHL account). Please send those 2 things over to us on Slack after you have added us as an admin and tag @Lexi Kingan, and we will get started on this process for you! The biggest benefit to having your own GHL account outside of ours is that you have the option to upgrade into the agency account where you can have unlimited sub accounts.

Person 1: What should I do if GHL asks me to set a password for your access?

Person 2: If GHL asks you to set a password for our access, please include that password in your reply along with your login link to your GHL account. This is just the link you go to login or access your GHL account. After you have added us as an admin, please send those two things over to us on Slack and tag @Lexi Kingan. We will get started on the integration process for you.

Person 1: What is the biggest benefit of having my own GHL account outside of yours?

Person 2: The biggest benefit of having your own GHL account outside of ours is that you have the option to upgrade into the agency account where you can have unlimited sub accounts.

Person 1: What is the downside of having your subaccount?

Person 2: The downside of having our subaccount is that if you ever wanted to move away, we can snapshot the account but you will lose all conversational data, email/sms stats, phone numbers, etc.

Person 1: How can I sign up for Max?

Person 2: Each person gets one Max signup link over email. Once that signup link has been clicked and directions have been followed on the next page, the link gets marked as used and it will no longer work. Adding new users will require new links to be sent out to their emails - old links cannot be reused.

Person 1: How can I login to Max?

Person 2: To login, you can go to the same link you used to sign up but just change the URL to /login. For example, if you signed up at askdrheather.max.air.ai/xyz123, then you would login with askdrheather.max.air.ai/login.

Person 1: Why can't I add my setter in Max?

Person 2: Right now, the ability to add agents/users yourself has been delayed until V2 of the dialer is released, so you will have that ability coming up soon!

Person 1: What is the process for adding new users to Max?
Person 2: To add new users to Max, you will need to fill out a form with the email addresses of the agents/users you would like to add. Once you have submitted the form, our developers will get started on finalizing your account.

Person 1: I am ready to sign up for Max, but I am not sure what role to select. Can you advise me on this?

Person 2: If you are going to be responsible for setting appointments, then you should select the "Setter" role.

Person 1: Will I receive one invite for both Max and GHL, or one for each?

Person 2: You will receive two separate emails - one inviting you to Max and another inviting you to GHL.

Person 1: I received a login email for GHL, but there is no link included. How do I access my GHL account?

Person 2: The GHL login email does not come with a login link. You can access your GHL account by going to this link: http://app.gohighlevel.com/

Person 1: I have multiple GHL accounts that I need to access from the same app. Is this possible?

Person 2: If the accounts have different logins, you will not be able to access them from the same app. However, you can download the High Level app and the Lead Connector app, and be logged into two different accounts simultaneously using that method.

Person 1: Where do I find the Zapier webhook for Max? I use a CRM called Pulse and I'm creating all the flows this week.

Person 2: If you use the included GoHighLevel CRM, the Zaps should be set up to trigger when a lead opts in on your funnel, then it creates a new lead profile in “LeadConnector”. If you’re using a different CRM, you can follow the same process of setting up Zaps that get funnel opt-ins into your preferred CRM - but you’ll have to check if Max supports your CRM at the moment. Currently, Max only supports GHL but the next version of Max, which is scheduled to launch in a matter of days, will have support for 80% of CRMs on the market.

Person 1: What happens if someone calls back into the Dialer?

Person 2: When a lead calls back, the call is routed to the agent that has been waiting the longest in line for a call to come through in that same lead list, but their number must have been called in the first place for it to route the call and there must be an agent that is currently dialing to get the call come in. It would give an error message if someone calls back and nobody is online.

Person 1: Is there any help on sending a bulk email in GHL?

Person 2: There are two ways to send bulk emails in GHL. The first way is to go to the marketing tab on the left-hand menu and select Emails. You can create a campaign and select the contacts to send it to and schedule when you want it to go out. The second way is to go to the contacts tab and select all contacts. Right above, you will see an icon that looks like a piece of mail and says "send email". This method is more of an email that looks personalized and not branded with logos. Please note that it is important to connect your domain to GHL to send emails from your company name for increased deliverability and open rates which lead to conversions. You can refer to this help doc from GHL for scheduling batch email campaigns: https://help.gohighlevel.com/support/solutions/articles/48001215379-how-to-schedule-batch-email-campaign-s-. Let me know if you have any further questions on this by tagging @Jared Gobler or @Lexi Kingan on Slack.

Person 1: What should I do if I deleted and reimported my leads a few times, and old leads that I removed are still showing up in the dialer?

Person 2: The reason the leads haven't been removed from Max is not due to a syncing issue. The 2-way sync only works for changing the statuses, but it does not work for deleting leads. The intended workflow is for you to change the Dialer Lead Status of the leads you want removed to something other than NONE (OTHER_REMOVE fits for this). Alternatively, you can send us the list of leads you want removed. If you just delete them in GHL, it won't remove them from the dialer.

Person 1: What are the available statuses for leads in MAX and how should I use them?

Person 2: The available statuses for leads in MAX are: NONE - No lead status & able to be called in dialer, SET - appointment set, removes from dialer, FOLLOWING_UP - Hangup or follow up appointment set due to some objection that didn't allow them to set - removes from dialer, OFFICIAL_DNC - When lead requests to be put on your Do Not Call list, BAD_NUMBER - Wrong person (Lead says Joe and Suzy picks up), DQ - Financial DQ or Not A Fit for your business, OTHER_REMOVE - Doesn't fit any other lead status but you want to remove them from the dialer. If you don't want a lead to be dialed, you can manually change their status in GoHighLevel by selecting any status besides "None."

Person 1: How do I send a bulk email in GHL?

Person 2: There are two ways to send bulk emails in GHL. First, you need to connect your domain to GHL to send from your company name, which will increase deliverability and open rates. You can go to the marketing tab on the left-hand menu and select "Emails." From there, you can make a campaign and select the contacts you want to send it to and schedule when you want it to go out. Alternatively, you can go to the contacts tab, select all contacts, and click the icon above that looks like a piece of mail to send an email using a template or writing a personalized email.

Person 1: Where do we set up the sales flow/texts in GHL?

Person 2: To set up the sales flow/texts in GHL, you can refer to AirU's Section 6 under "Setting Up Tech & Automations" and then "Set Up Automations to Book Calls through Email & Text." The video is done by Jared Gobler and there is an accompanying PDF and GHL Snapshot that you can download.

Person 1: How do I add a phone number to my GHL account?

Person 2: You can download the checklist in the GHL Setup Checklist lesson which will walk you through the process of adding a phone number to your GHL account.

Person 1: Where can I get the GHL Snapshot?

Person 2: You can get the GHL Snapshot at this link: https://affiliates.gohighlevel.com/?fp_ref=max-ai38&share=VfIWJB3D4miEe8PGNIVM. You can load this link into the same browser you are logged into GHL with and populate this snapshot.

Person 1: My emails are going to spam. What can I do to prevent this?

Person 2: There are a few things you can do to prevent your emails from going to spam. First, send a test email to a dummy account and see who receives, opens, and clicks it. Use a reputable email service provider that follows email best practices. Implement email authentication methods like SPF, DKIM, and DMARC to ensure the legitimacy of your emails. Avoid using spammy content like excessive capital letters or exclamation marks, and always include an unsubscribe link. Ask your recipients to add you to their contacts to avoid being marked as spam, and keep an eye on your email metrics such as open rates, click-through rates, and spam complaints to identify any issues that may be causing your emails to be marked as junk.