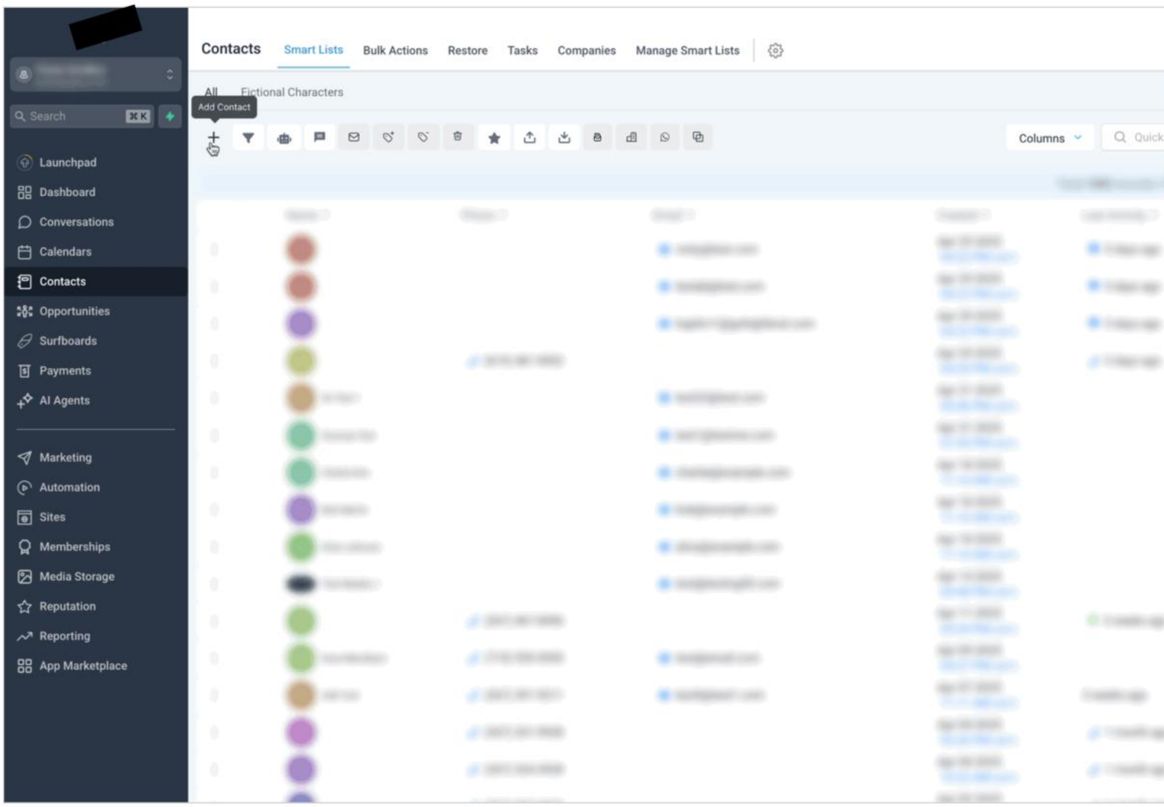
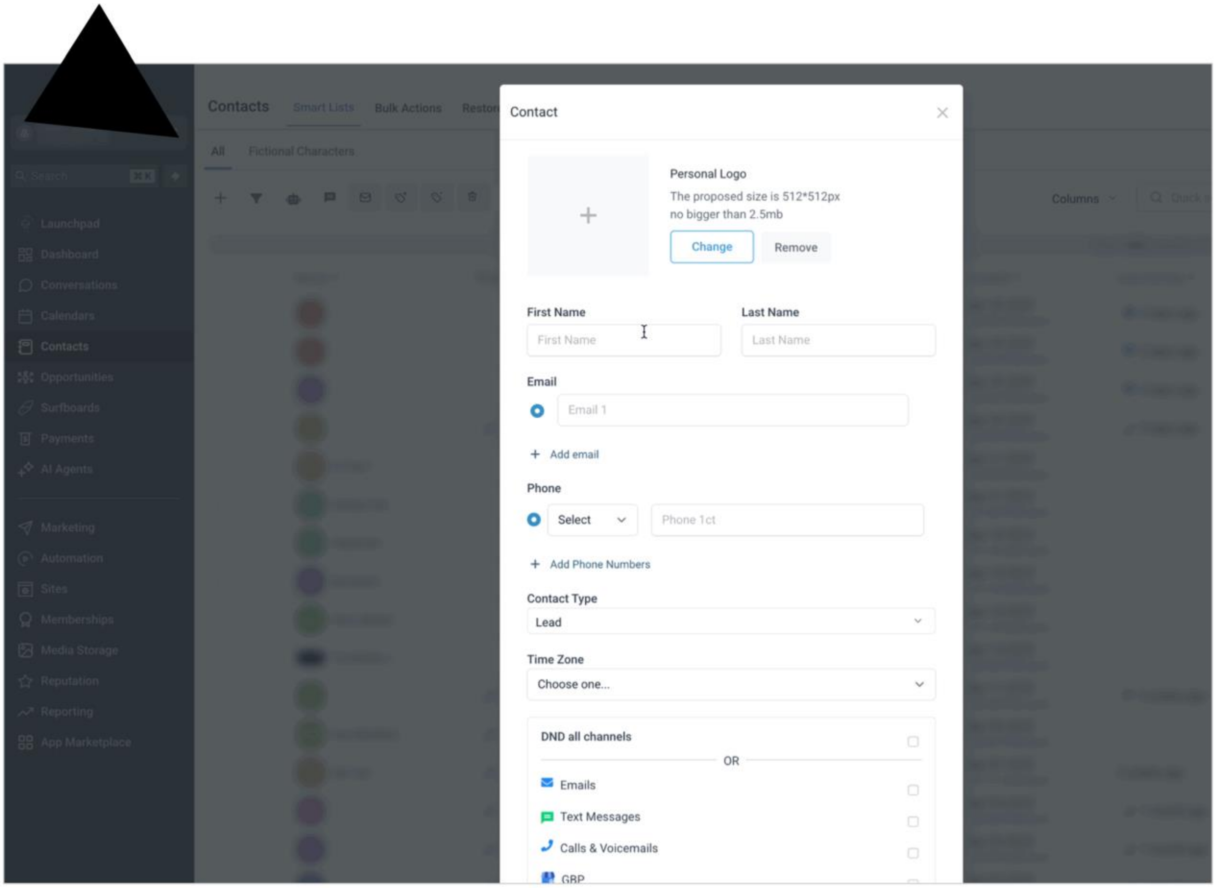
Create New Contact

Let's dive right in by adding your very first contact. Establishing your network starts with this simple step:

1. Navigate to **Contacts** in the main menu.
2. Click the **Add Contact** button.
3. Enter the contact details (name, email, phone, etc.). Remember, the more information you provide, the easier it will be to personalize your engagements. If you don't see the contact field you need to add information to, use the Create New Custom Field checklist.
4. Click **Save**.
5. 

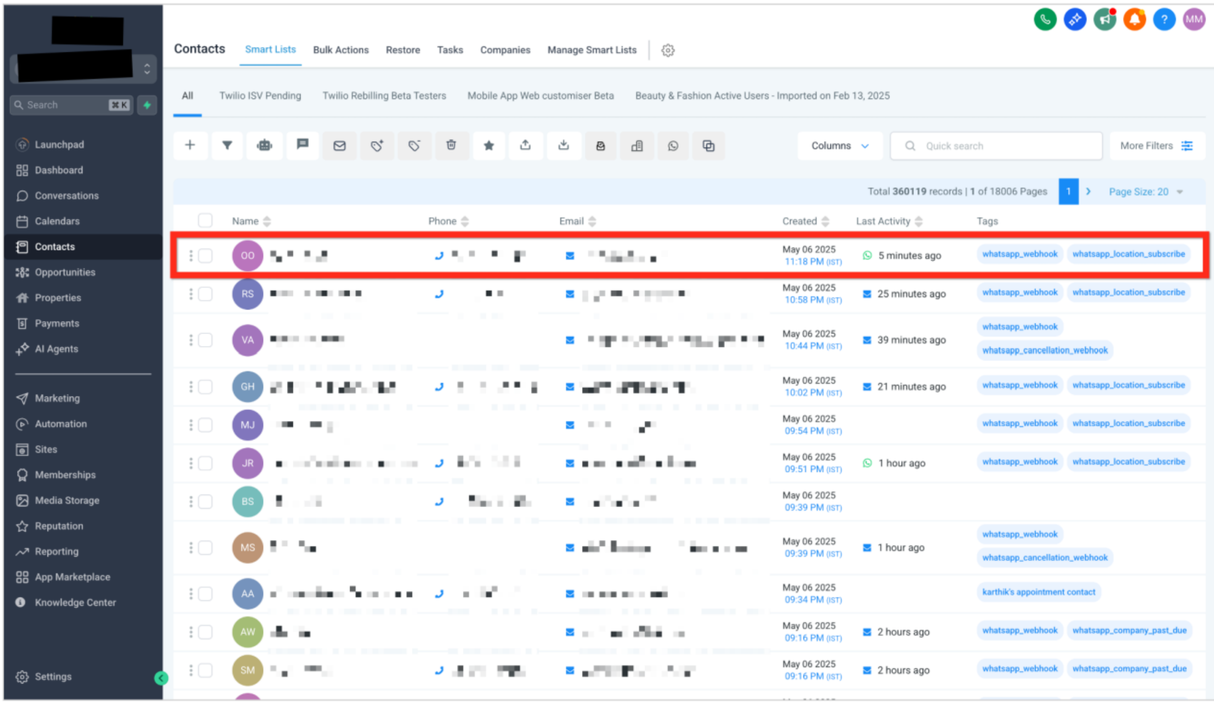
6. 

Did you know? When a Form or Survey is filled out by a new lead, a new contact is automatically created!

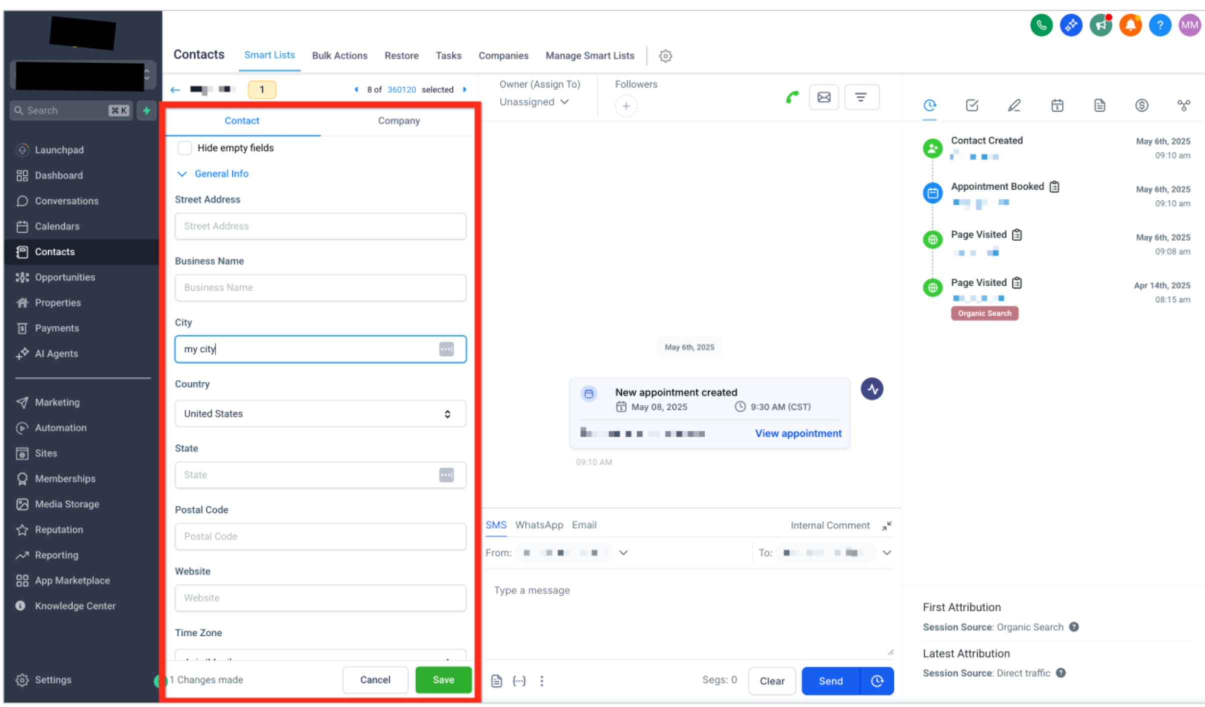
Edit Existing Contact

Keep your contact information current and accurate. Editing contacts is quick and straightforward, ensuring your data stays up-to-date:

1. Navigate to **Contacts**.
2. Click on a contact row to open the **contact card** you wish to edit.



3. Make the necessary updates on the left-hand side. If you don't see the contact field you need to add information to, use the Create New Custom Field checklist. Click **Save** to apply your changes.

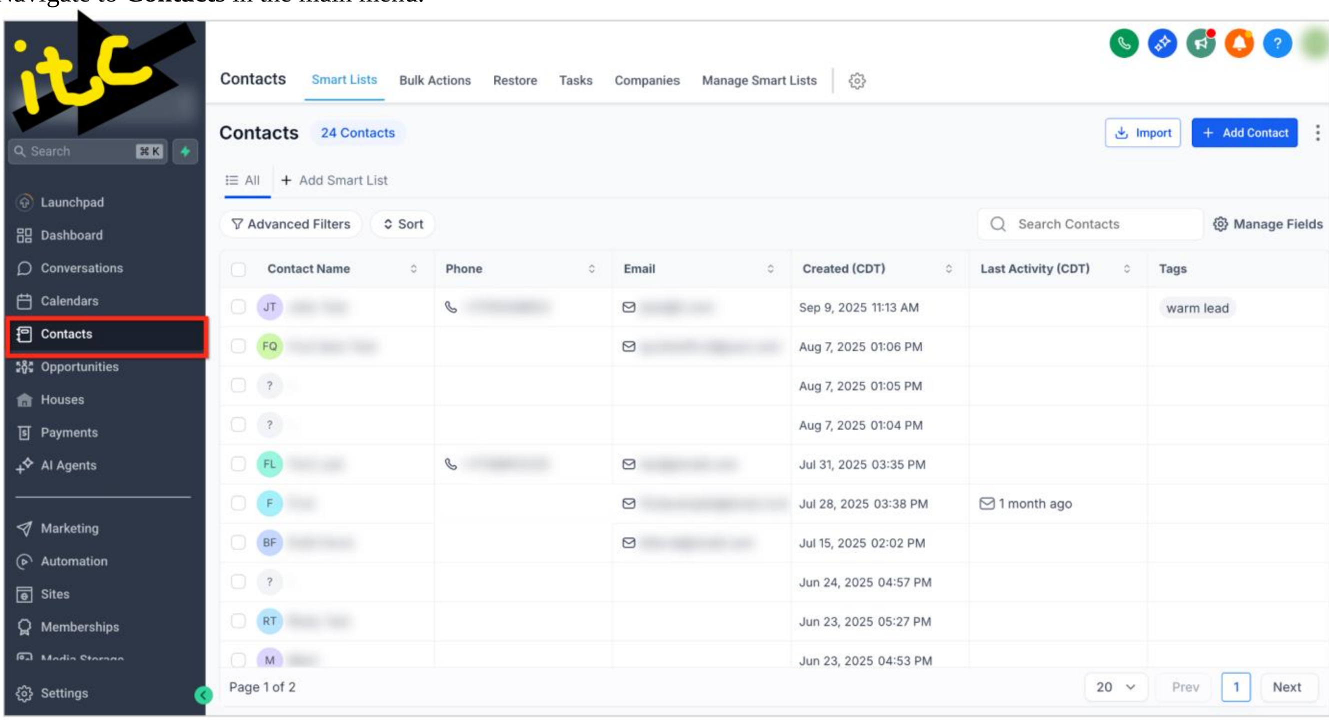


Delete an Existing Contact

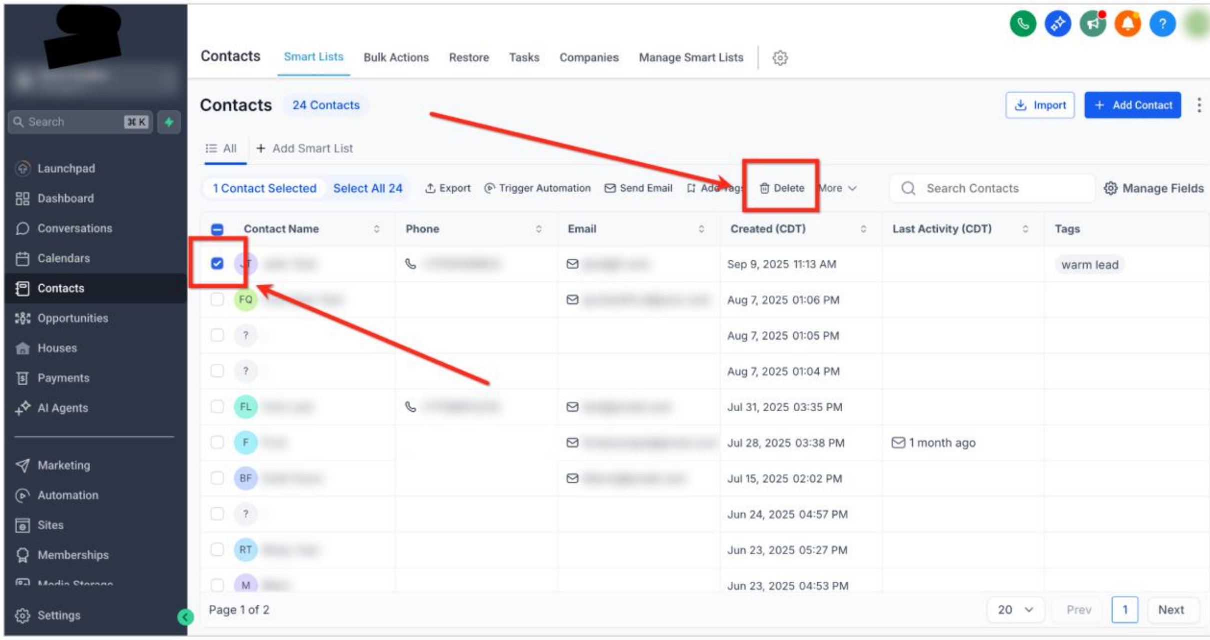
Deleting any contacts will also remove the corresponding: Conversations, Notes, Opportunities, Tasks, Appointments, Manual Actions, Community Group Owners. It will also stop any active campaigns and workflows for the contacts. Deleted contacts can be restored within 2 months

Follow these steps to delete a contact:

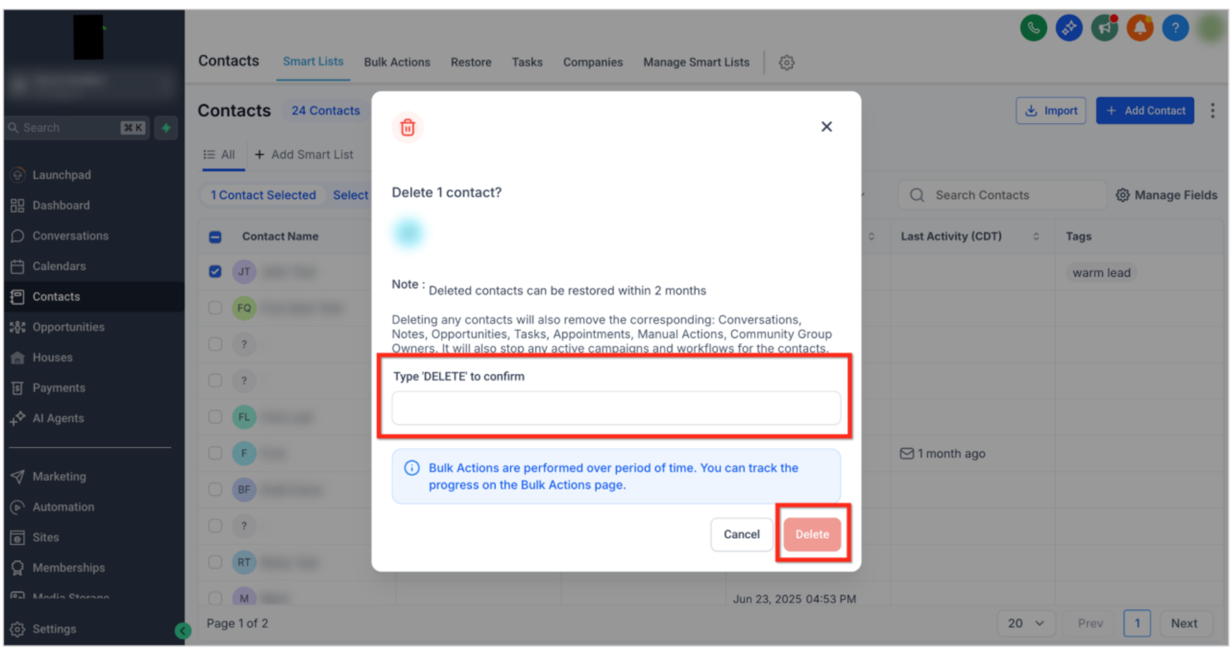
1. Navigate to **Contacts** in the main menu.



Select the contact you would like to delete using the checkbox to the left of the name. Then click the **Delete** button



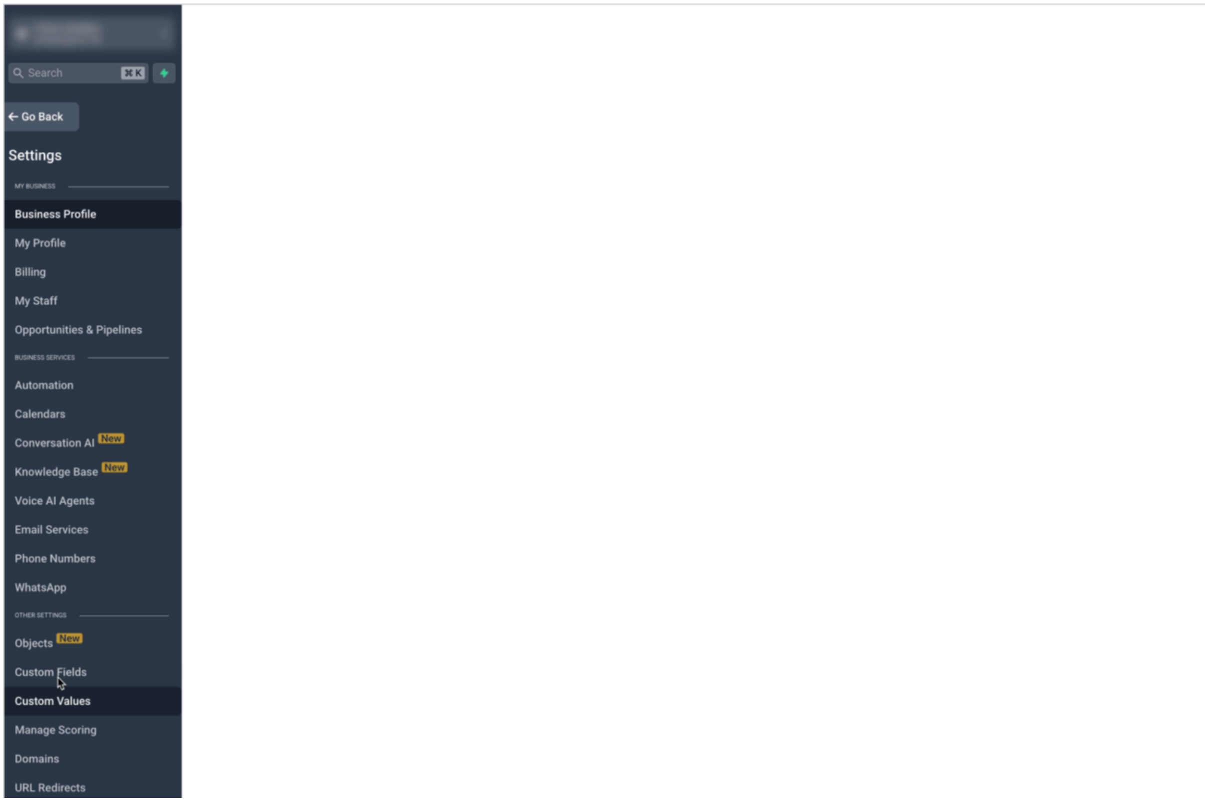
Confirm for action by typing **DELETE** in the popup window. Then click the **Delete** button.

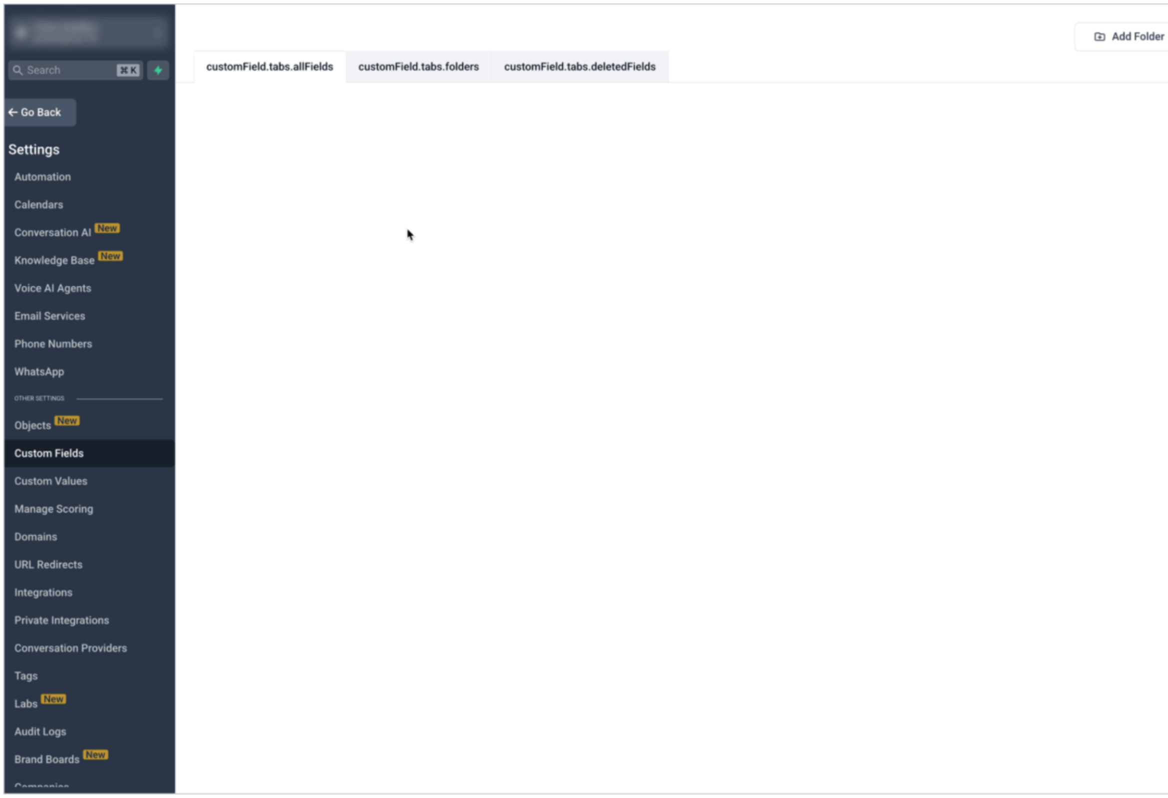


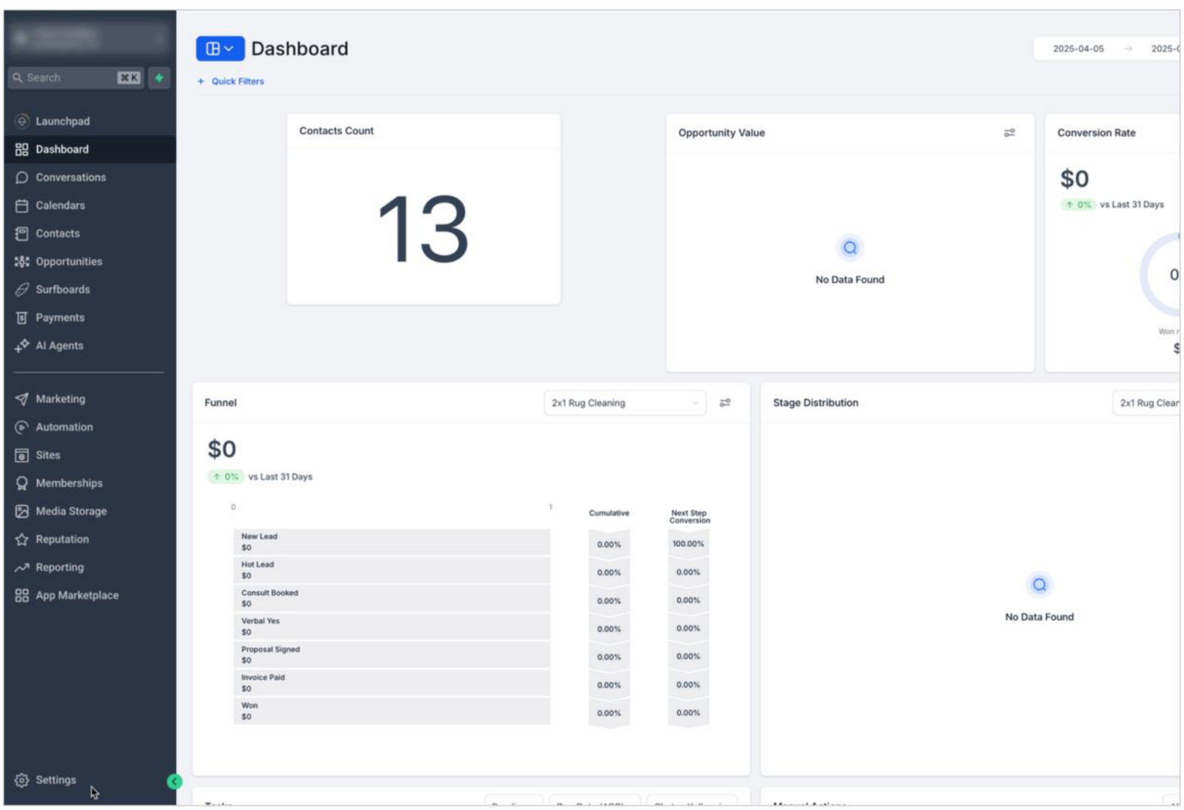
Create New Custom Fields

Custom fields allow you to tailor your contact database to fit your specific business requirements. Easily track the data that's most important to you and your team:

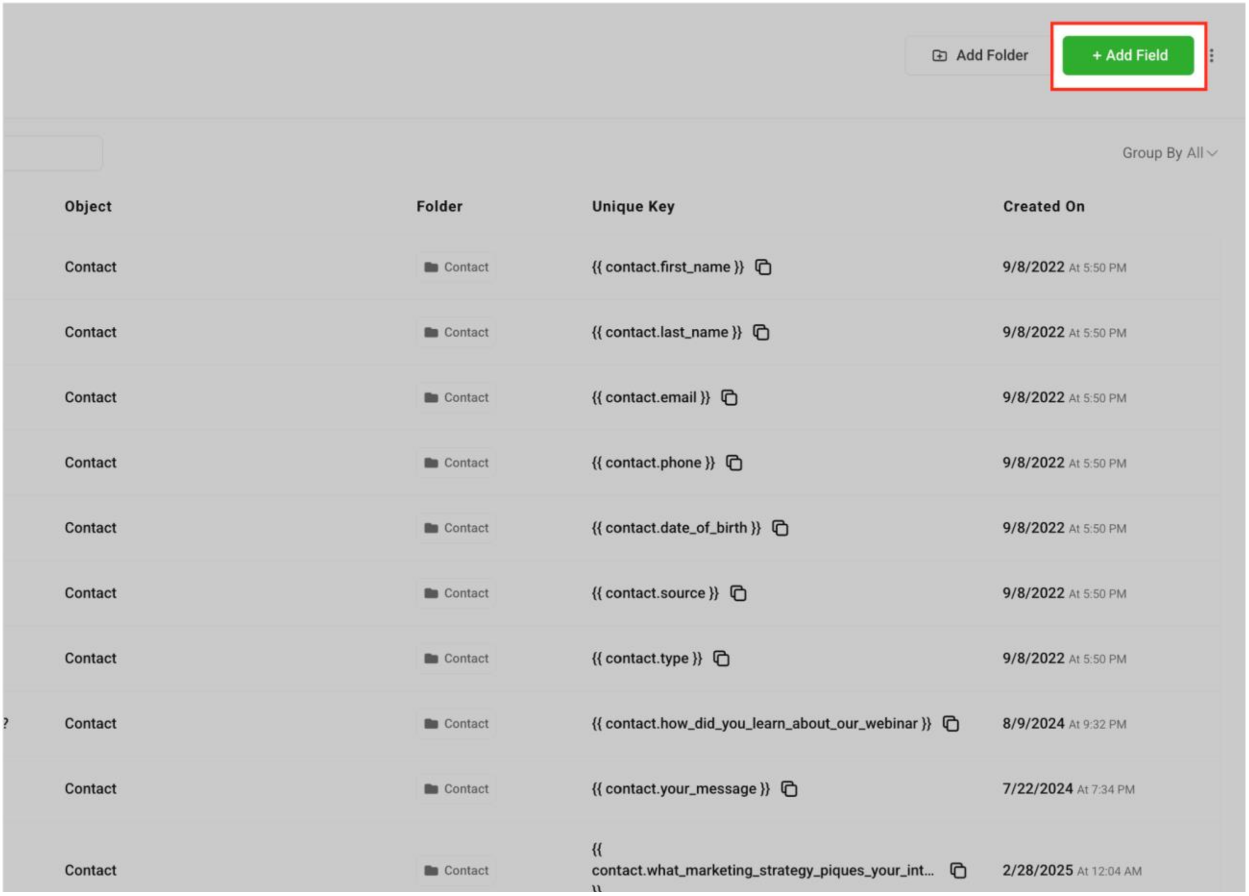
1. Navigate to **Settings > Custom Fields**.




Search
Go Back
Settings
Automation
Calendars
Conversation AI New
Knowledge Base New
Voice AI Agents
Email Services
Phone Numbers
WhatsApp
OTHER SETTINGS
Objects New
Custom Fields
Custom Values
Manage Scoring
Domains
URL Redirects
Integrations
Private Integrations
Conversation Providers
Tags
Labs New
Audit Logs
Brand Boards New
Add Folder
customField.tabs.allFields
customField.tabs.folders
customField.tabs.deletedFields

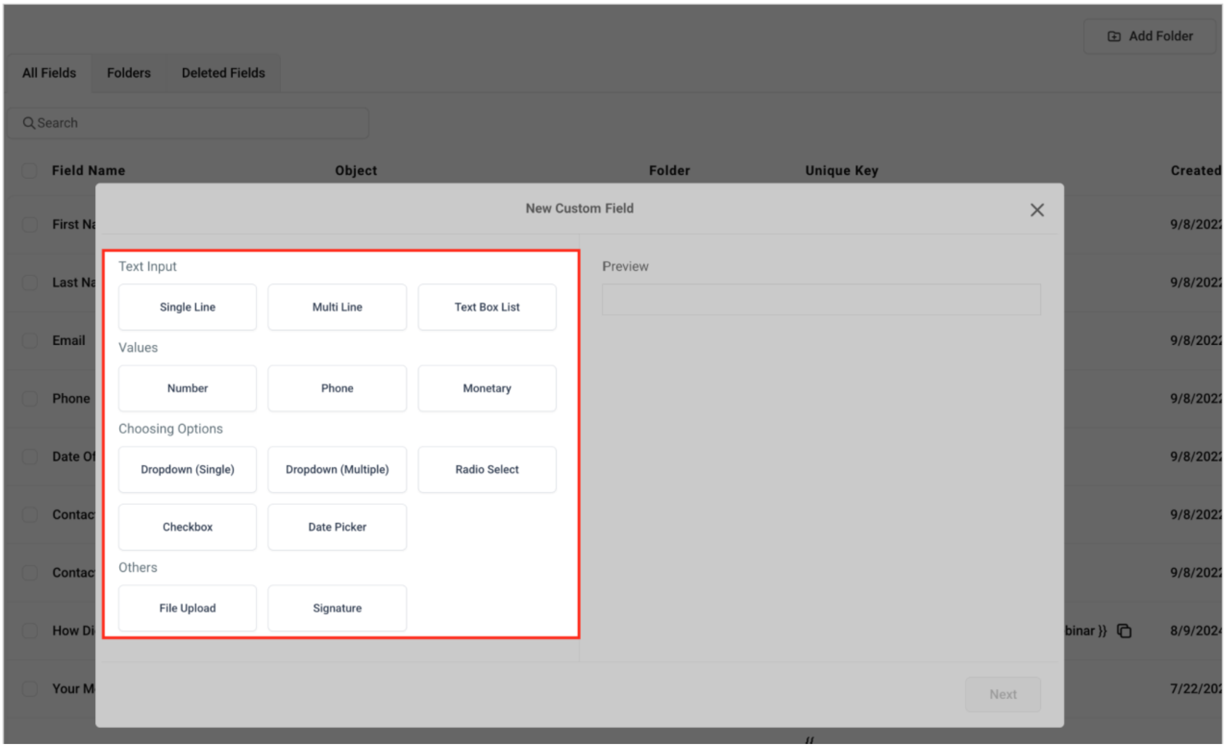

Search
Launchpad
Dashboard
Conversations
Calendars
Contacts
Opportunities
Surfboards
Payments
AI Agents
Marketing
Automation
Sites
Memberships
Media Storage
Reputation
Reporting
App Marketplace
Settings
Dashboard
2025-04-05
Quick Filters
Contacts Count
13
Opportunity Value
No Data Found
Conversion Rate
$0
0% vs Last 31 Days
Funnel
2x1 Rug Cleaning
$0
0% vs Last 31 Days
Cumulative
Next Step Conversion
New Lead $0 0.00% 100.00%
Hot Lead $0 0.00% 0.00%
Consult Booked $0 0.00% 0.00%
Verbal Yes $0 0.00% 0.00%
Proposal Signed $0 0.00% 0.00%
Invoice Paid $0 0.00% 0.00%
Won $0 0.00% 0.00%
Stage Distribution
No Data Found

2. Click **Add Field**.



3. Choose the **type** of field you want to create (e.g., text, dropdown, date).

3. Choose the **type** of field you want to create (e.g., text, dropdown, date).



4. Complete the field details (name, group, placeholder, etc.). This helps ensure your team understands exactly what information is needed. Click **Save**.

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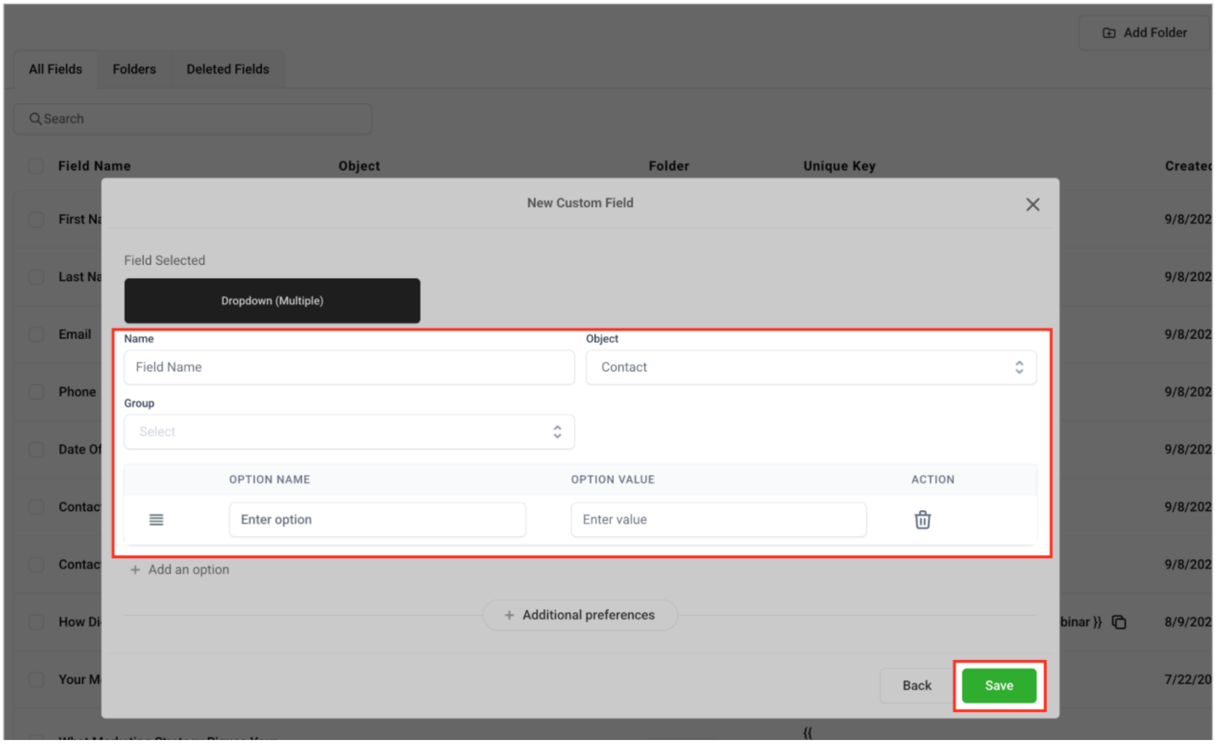


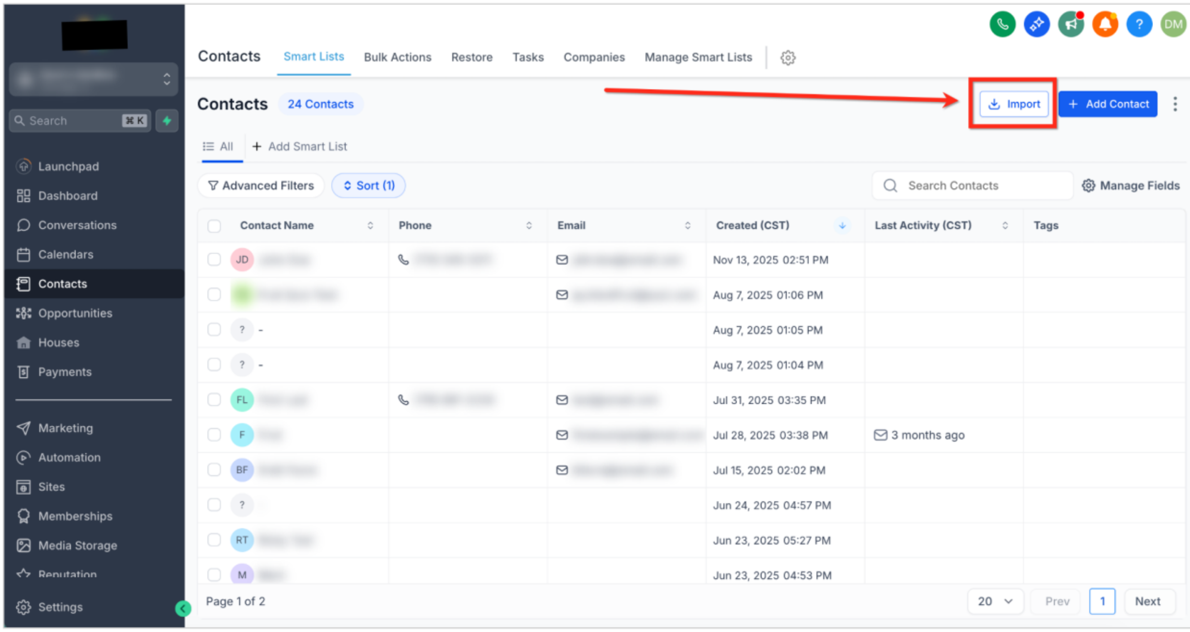
How to Import Contacts

Streamlining your outreach starts with importing your contacts. Follow these straightforward steps to ensure a smooth import:

1. Navigate to **Contacts**.

2. Click **Import** (the icon looks like a downward arrow pointing into a box).

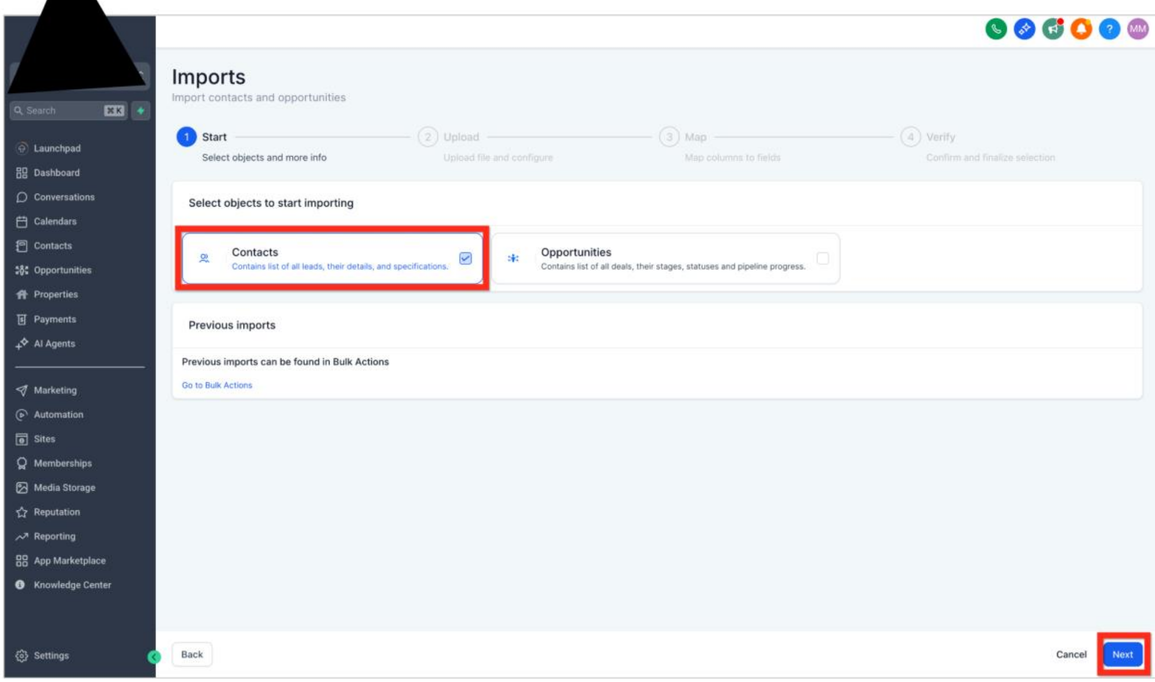
2. Click **Import** (the icon looks like a downward arrow pointing into a box).



1.

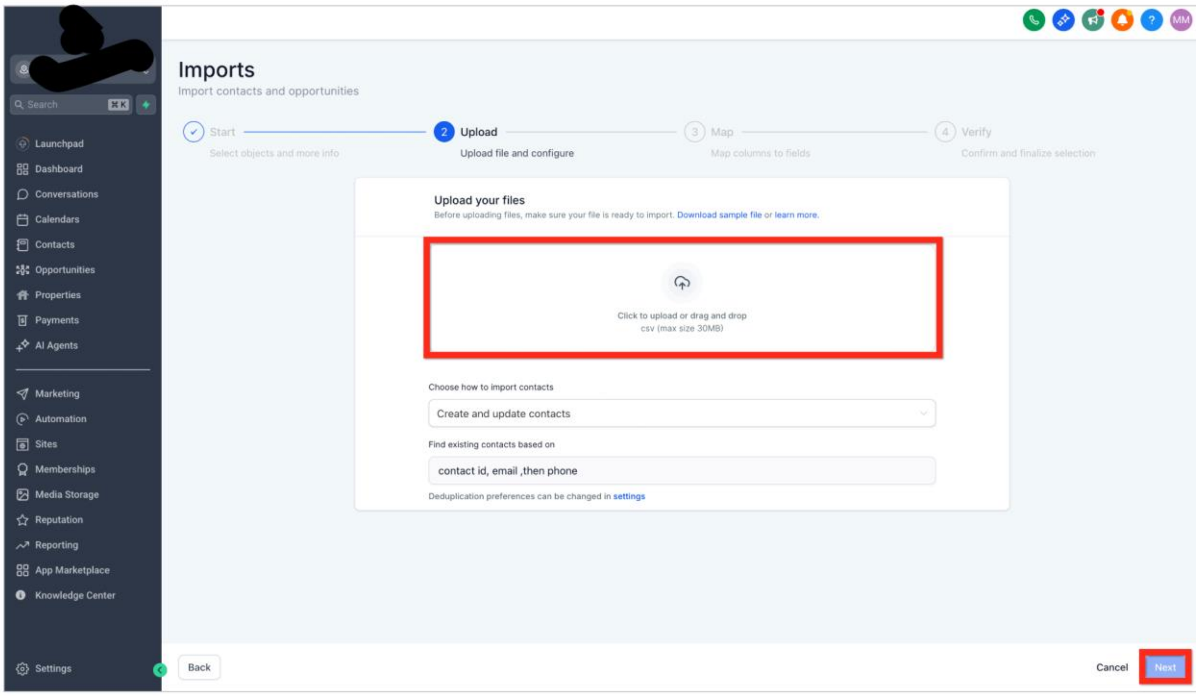
2. In Imports-1, Select **Contacts** and click **Next**

3. In Im[redacted]rts-1, Select **Contacts** and click **Next**



1. Confirm your file format.

2. Upload your file (CSV files up to 50MB). To download a sample file showing standard Contact Fields, click **Download Sample File.**



Standard Contact Fields During Import

Below is a list of the standard contact fields that can be used when importing contacts:

- Contact ID
- Name
- First Name
- Last Name
- Date of Birth
- Contact Owner
- Contact Source
- Contact Type
- Business Name
- Phone
- Email
- Business Name
- Address
- State
- City
- Postal Code
- Country
- DND

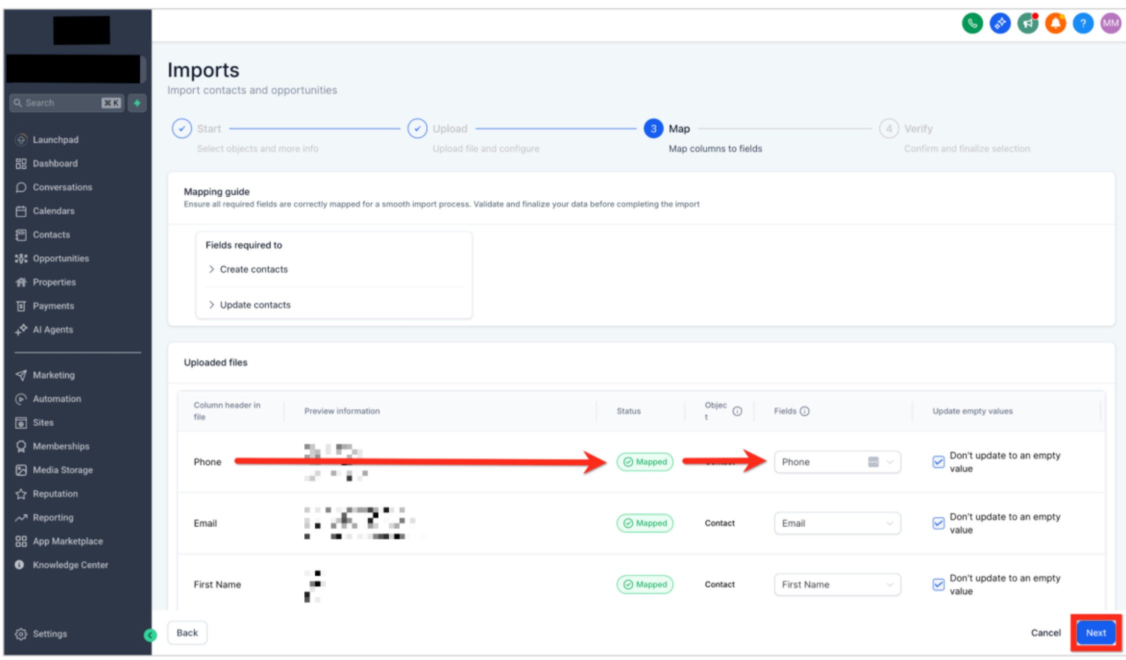
- Time Zone
- Website
- Additional Email
- Additional Phones
- Notes

1.
Map your file columns to corresponding Contact fields.

- If you have non-standard data, create a new custom field.
- Or select "Don't import data in unmatched columns".

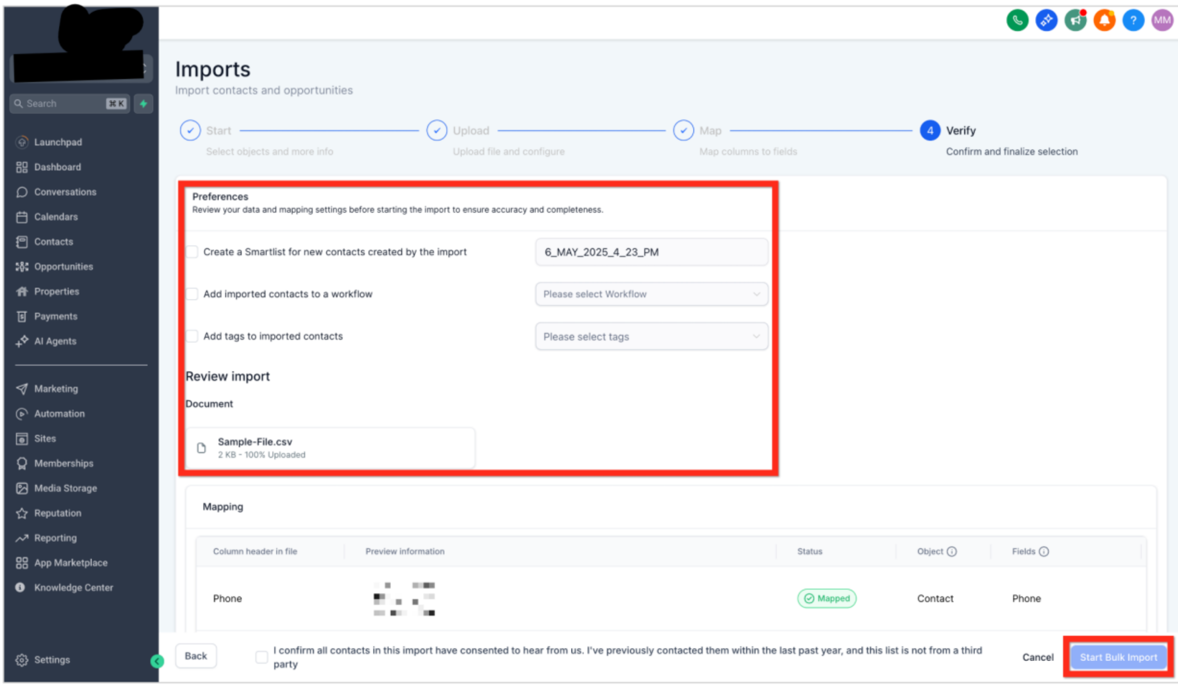
6. Map your file columns to corresponding Contact fields.

- If you have non-standard data, create a new custom field.
- Or select "Don't import data in unmatched columns".



1.
Fill in the import details (name your import, create lists, set consent preferences, etc.) and click **Bulk Import.**

7. Fill in the import details (name your import, create lists, set consent preferences, etc.) and click **Bulk Import.**



1.

2. Wait for the contacts to finish importing.

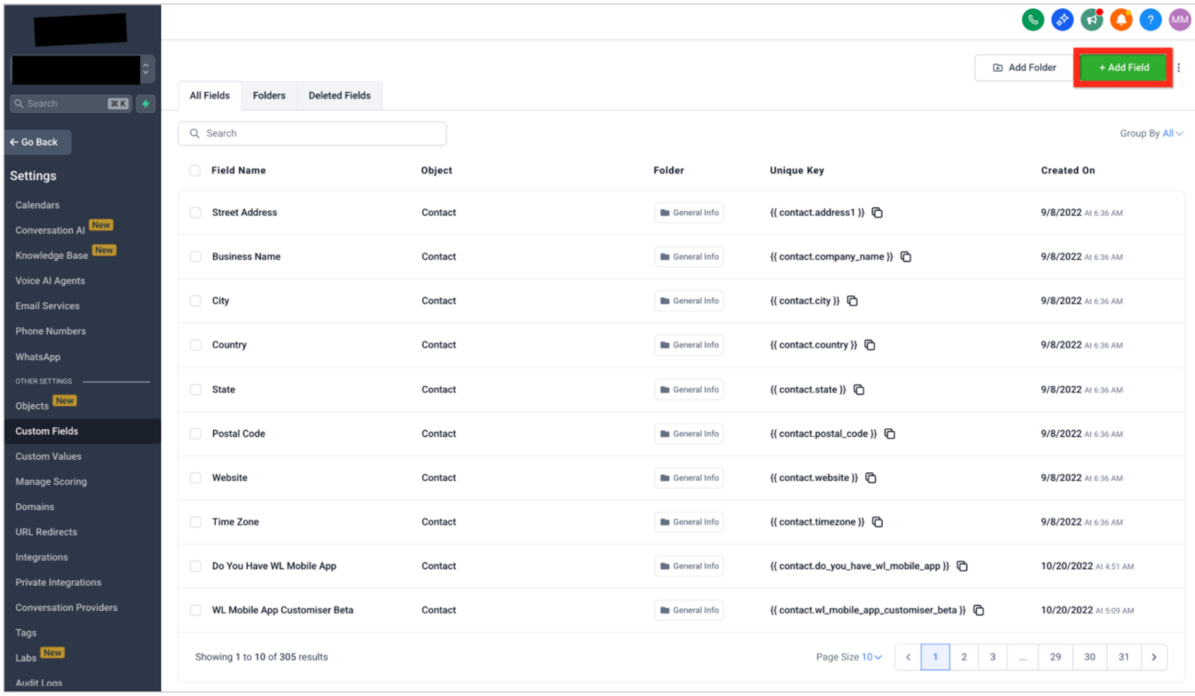
- Importing Contacts using a CSV file
- Importing Contacts and Opportunities via CSV
- Allow Duplicate Contacts (Contact Deduplication Preferences)

How to Create New Custom Fields

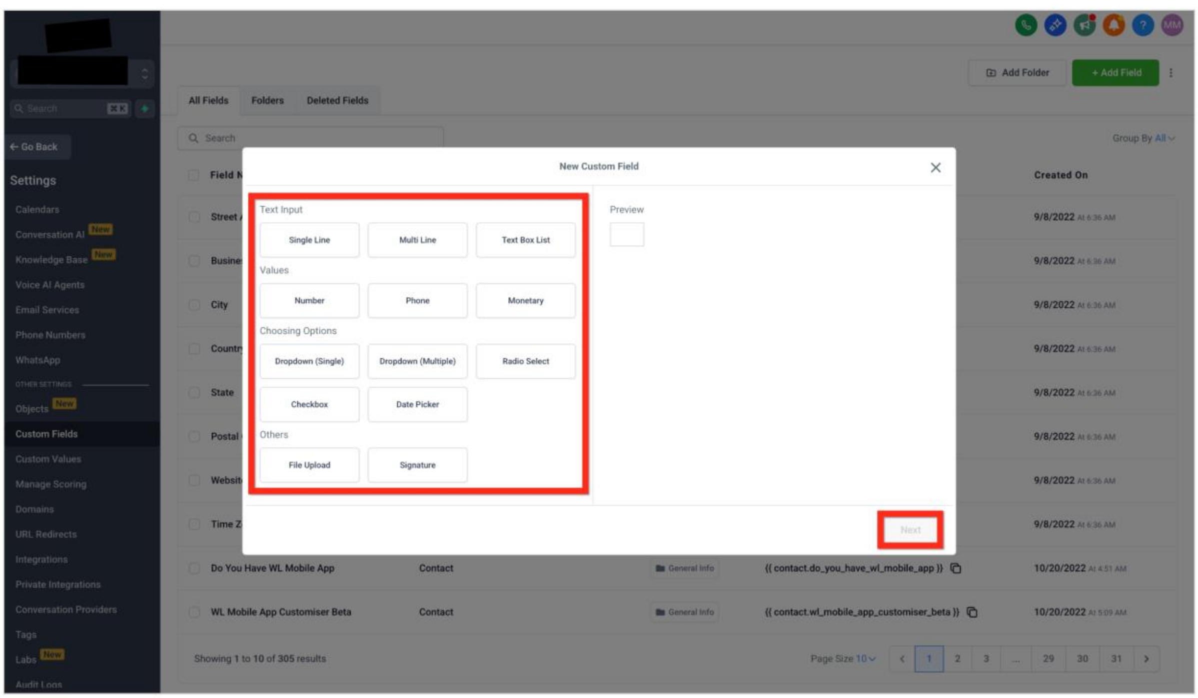
Personalize your contact data to match your unique business needs. Creating custom fields lets you capture exactly the information you find valuable, allowing for precise targeting and richer insights.

Here's how to set up your custom fields:

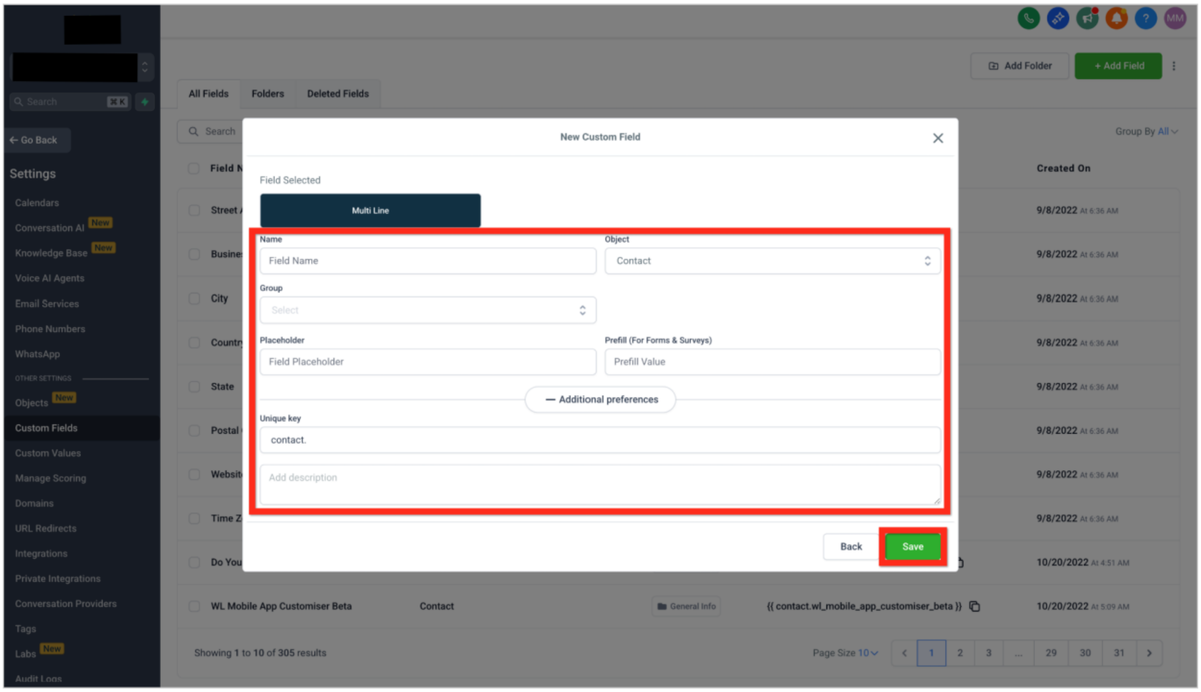
1. Navigate to **Settings** > **Custom Fields**.
2. Click **Add Field**.



3. Select the type of field you need.



4. Fill in the field details (name, group, placeholder, etc.).



- How to Use Custom Fields

  Next, leverage your custom fields to enhance your campaigns and messaging!

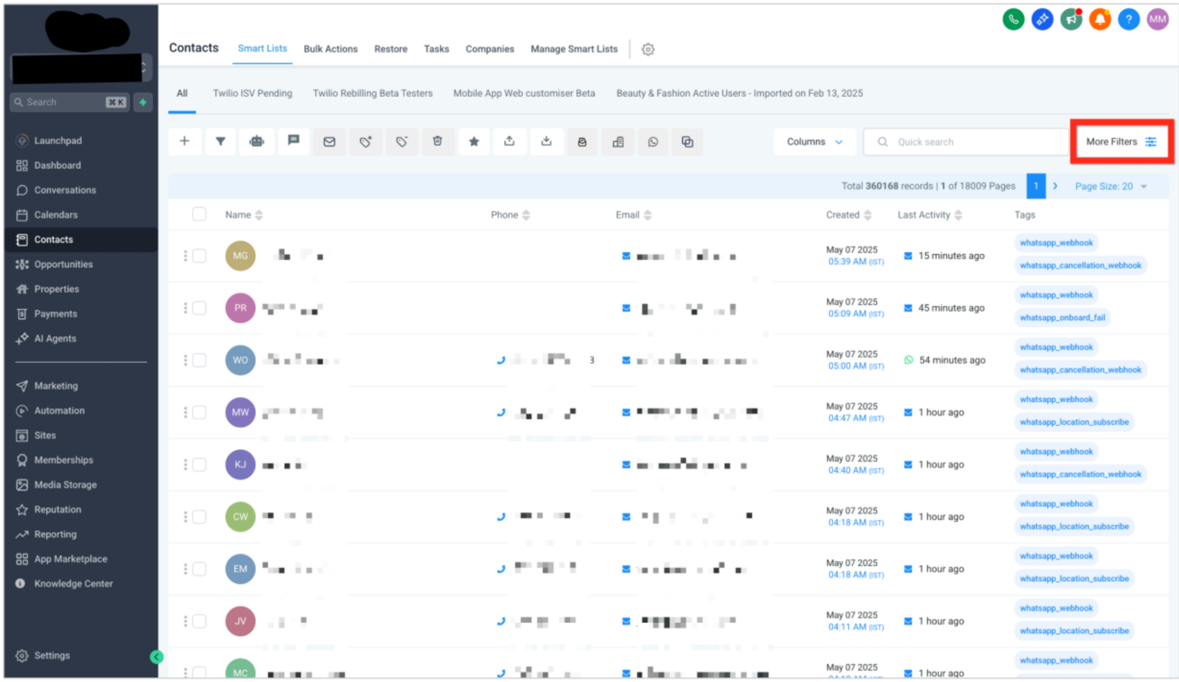
Bulk Contact Actions

Effortlessly manage large groups of contacts with powerful bulk actions. Whether you're adding tags, sending emails, or initiating automations, bulk actions save you time and amplify your efficiency.

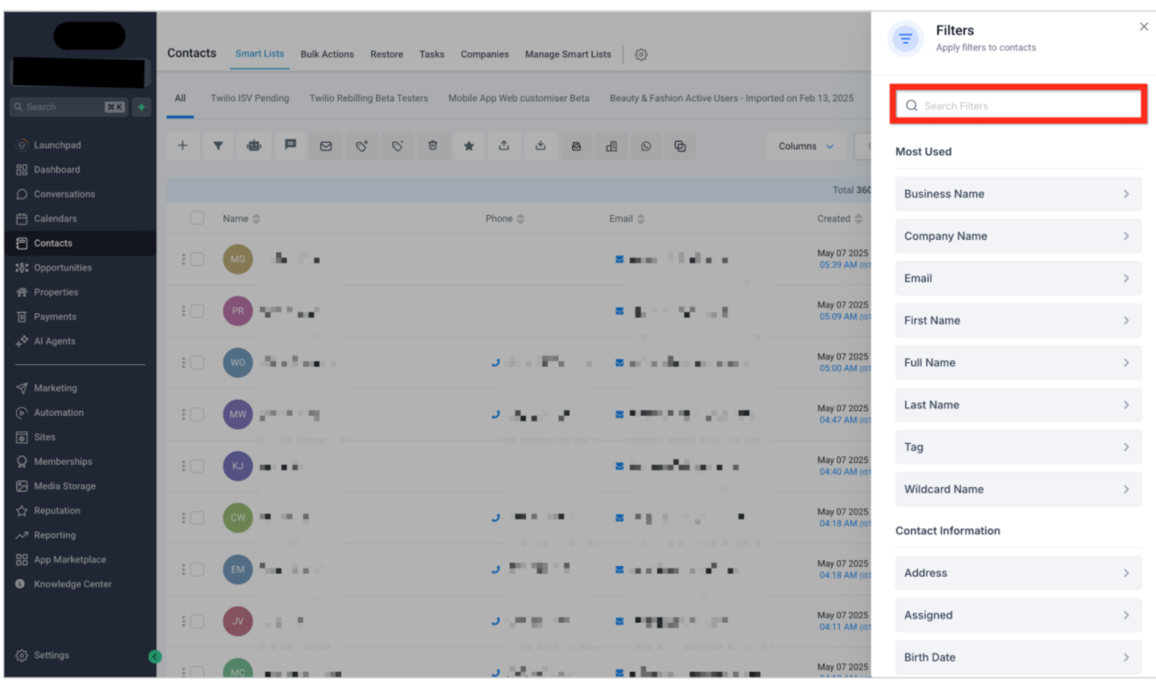
Here's how you do it:

1. Navigate to **Contacts**.

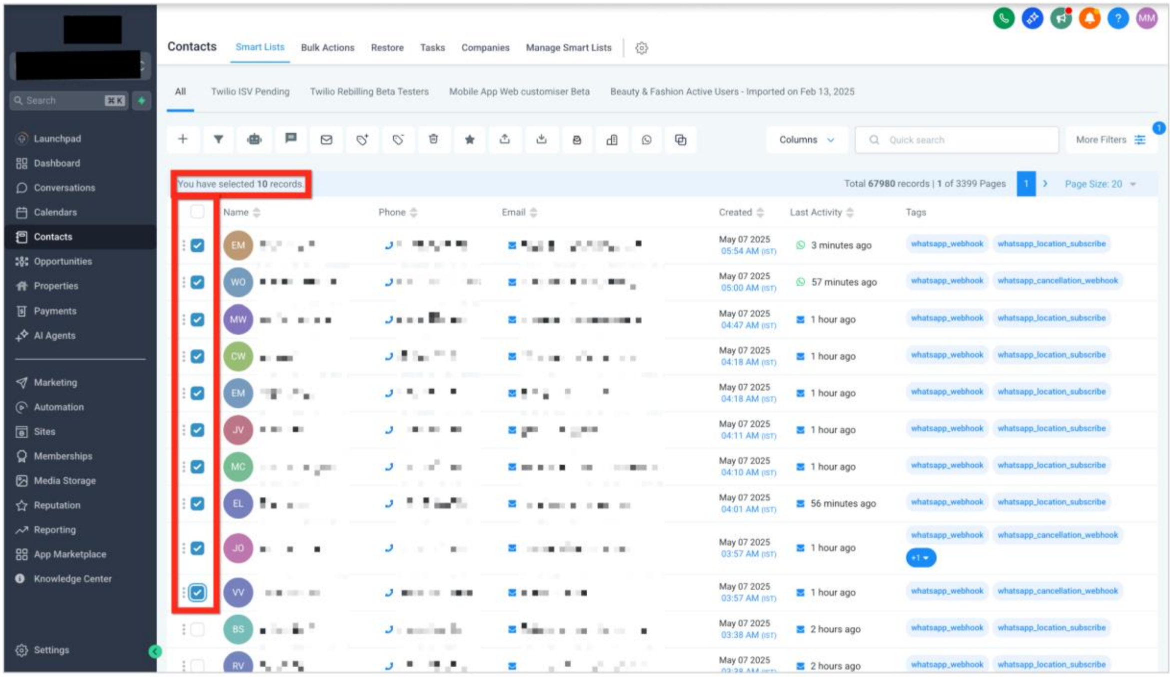
1. Navigate to **Contacts**.



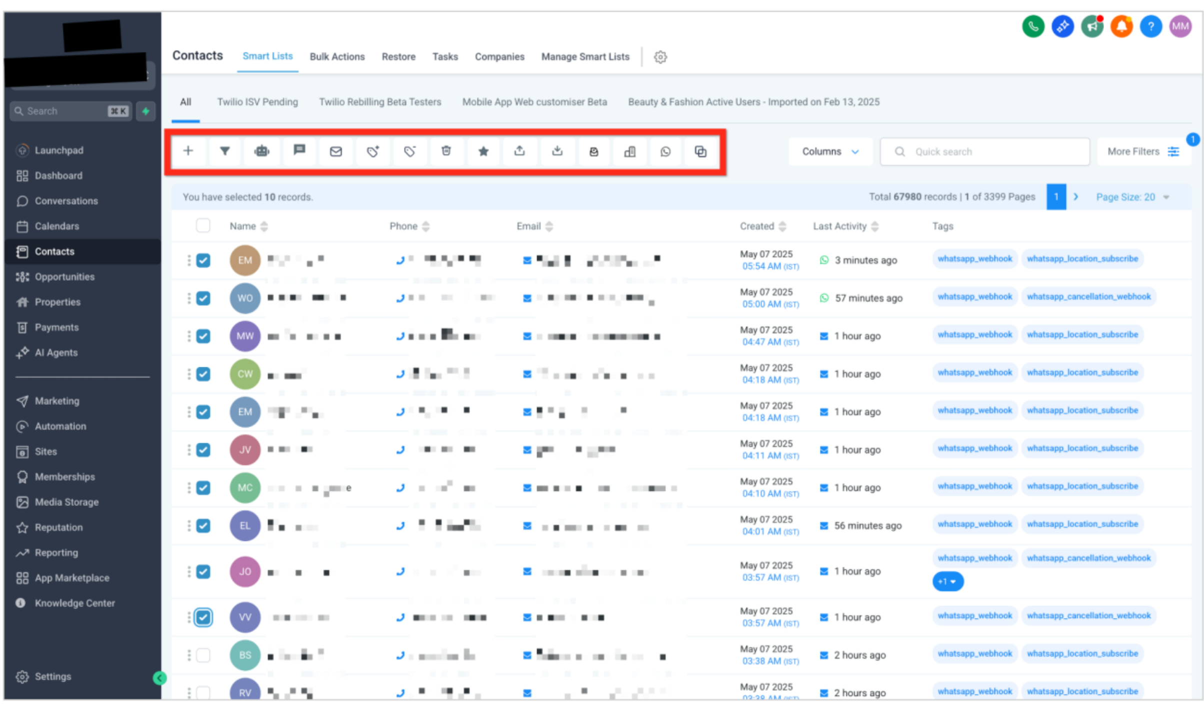
2. Apply filters to narrow down your audience.



3. Select checkboxes next to your chosen contacts.



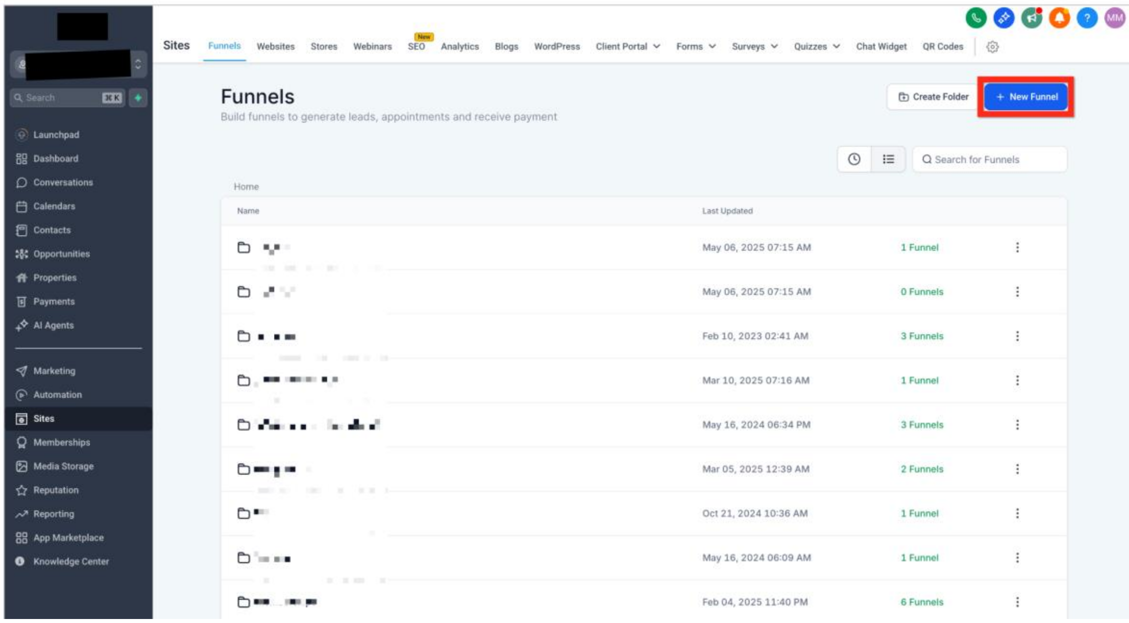
4. Click a bulk action button (e.g., Add to Automation, Send SMS, Send Email).



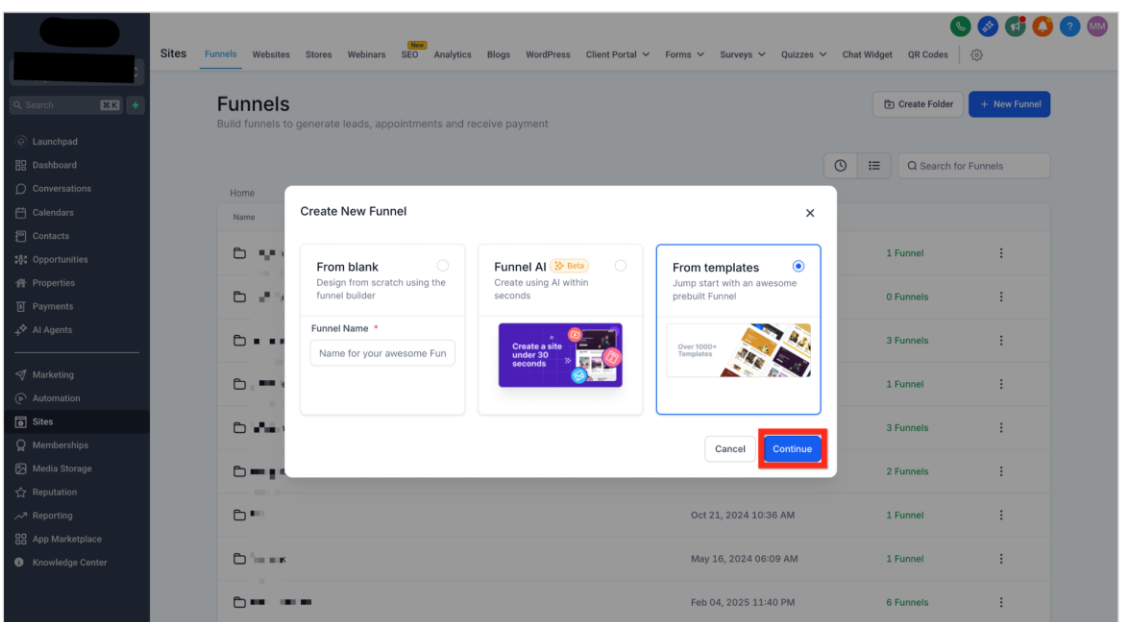
Create a Funnel Options

Every great journey starts with the first step, and in this case, it's creating your funnel. Let's get started:

1. Go to **Sites > Funnels**.



2. Click **New Funnel**, then select one of these options:
    1. **From Blank** (build your own)
    2. **Funnel AI** (AI-powered creation)
    3. **From Templates** (use a pre-designed funnel)



Next step: Ready for more? Dive into customizing your funnel design to match your brand personality!

Create a Funnel From Template

Save time and start strong! Templates provide a professional design that's proven to convert, allowing you to focus on fine-tuning rather than starting from scratch.

1. Navigate to **Sites > Funnels**
2. Click New Funnel > From Template > **Continue**
3. Open the **Template Library**.
4. Search, filter, and sort through the templates.

The Template Library is a collection of professionally designed templates for websites, funnels, social media posts, email campaigns, and even more areas! These templates come with high-quality stock images and content, allowing users to create polished marketing materials efficiently.

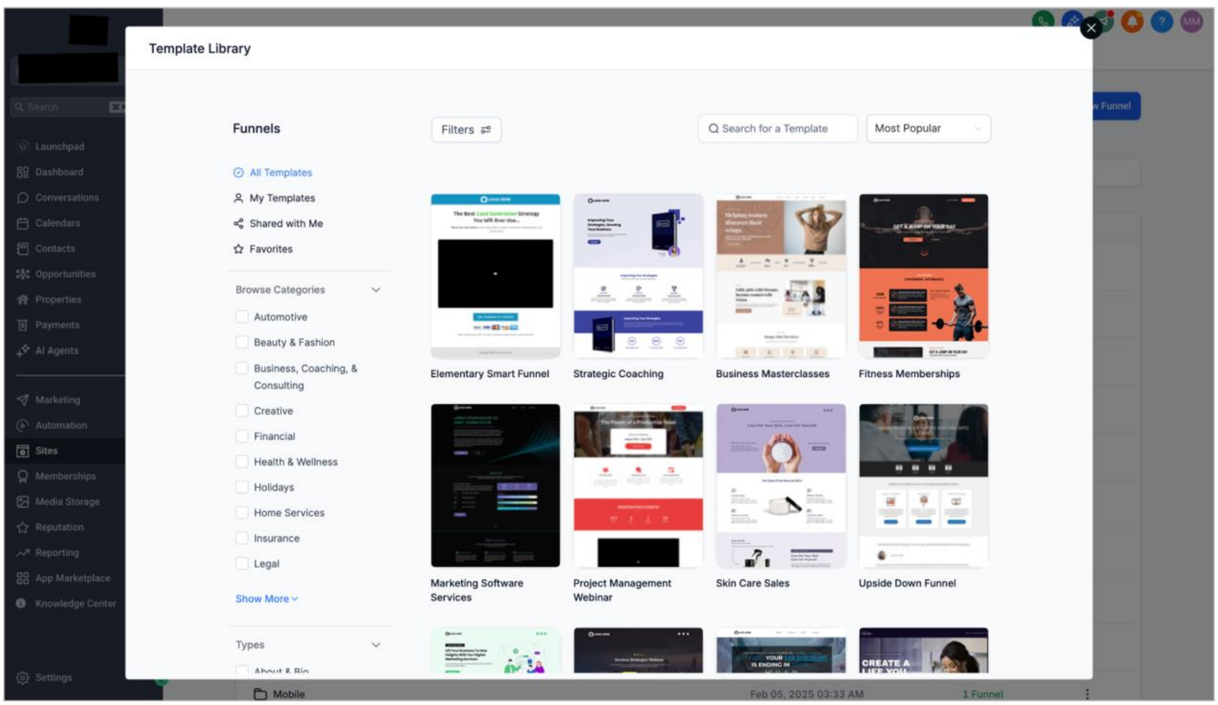
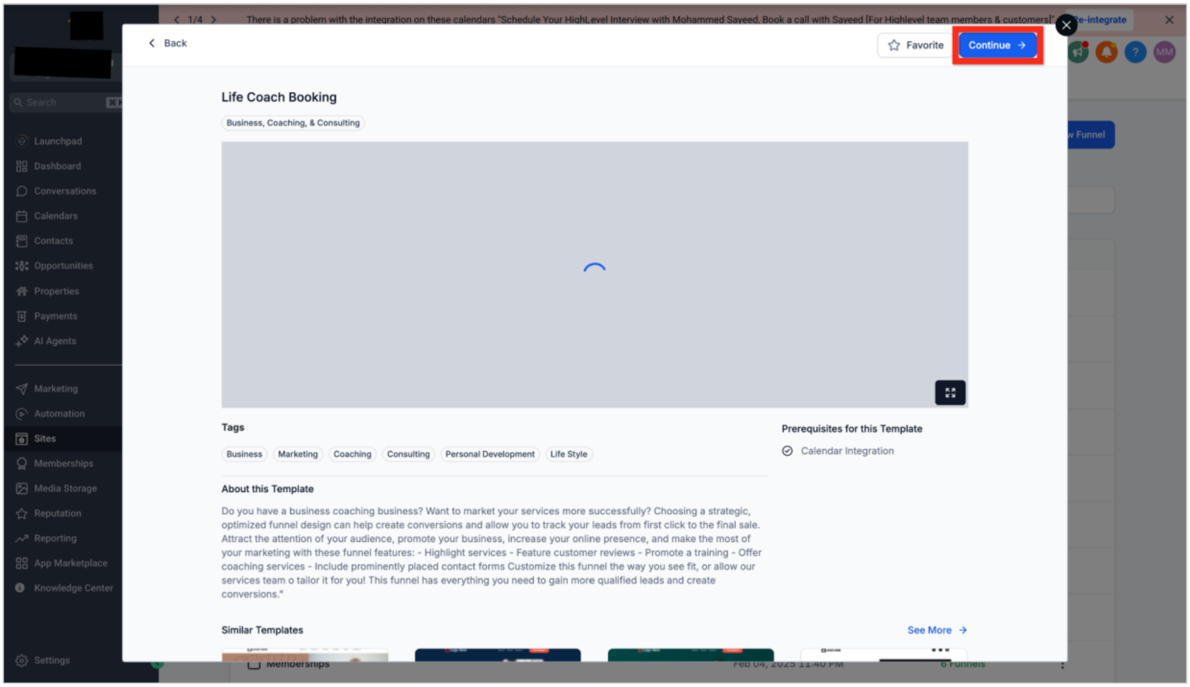


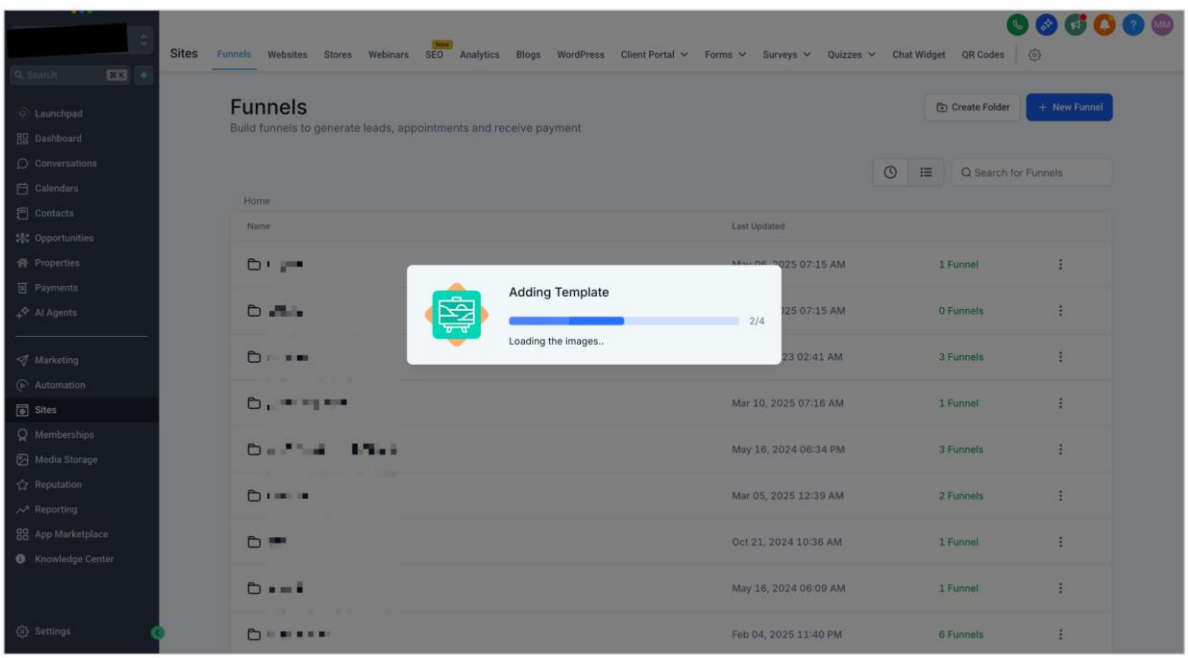
Figure 1

5. **Preview** your chosen funnel template.

6. Click **Continue**.



7. Customize it in the **Funnel Editor**.



1. Click **Save**.
Learn More: Template Library Overview & Setup

Next step: Take your funnel further—integrate a custom form to collect valuable visitor information.

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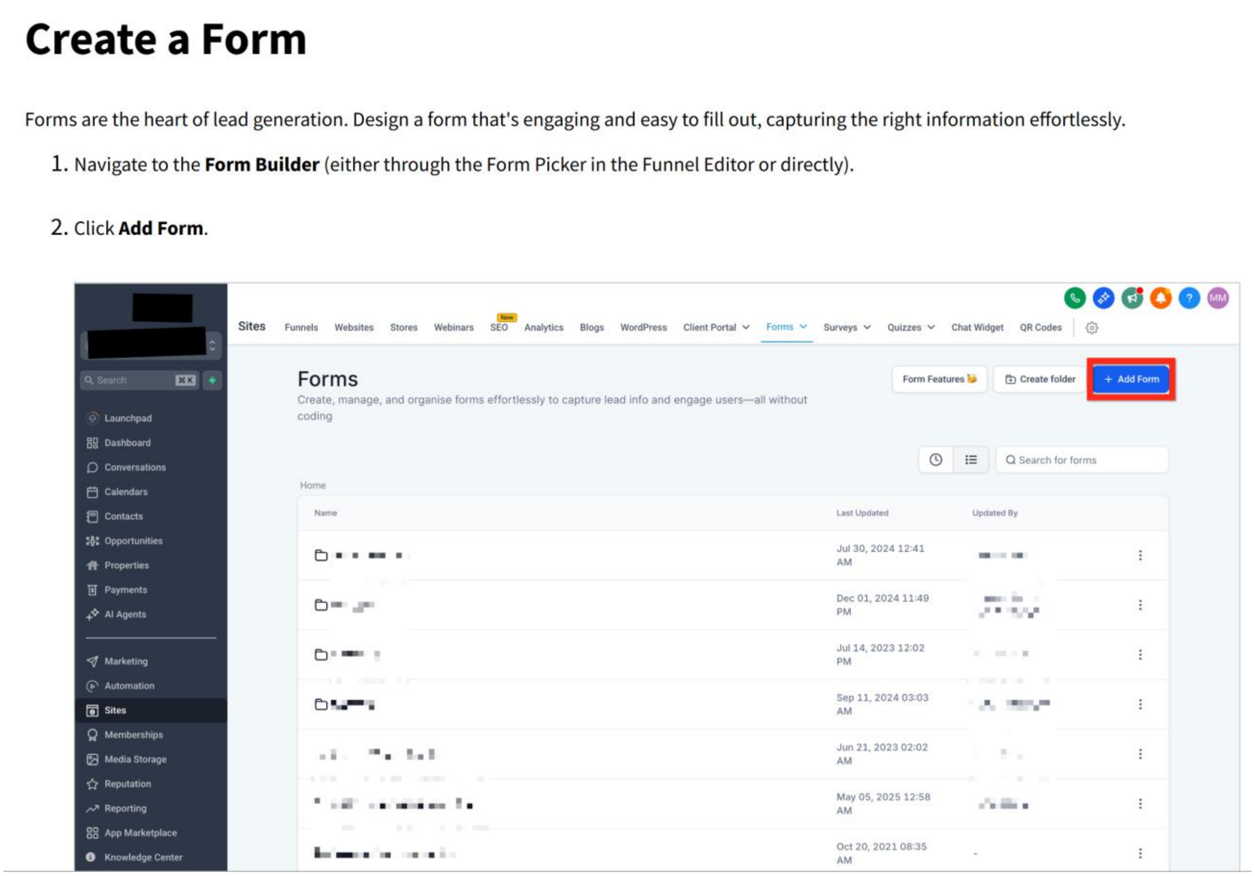


Create a Form

Forms are the heart of lead generation. Design a form that's engaging and easy to fill out, capturing the right information effortlessly.

1. Navigate to the **Form Builder** (either through the Form Picker in the Funnel Editor or directly).

2. Click **Add Form**.

1. Customize fields and branding using the **Form Editor**.
2. Click **Save**.

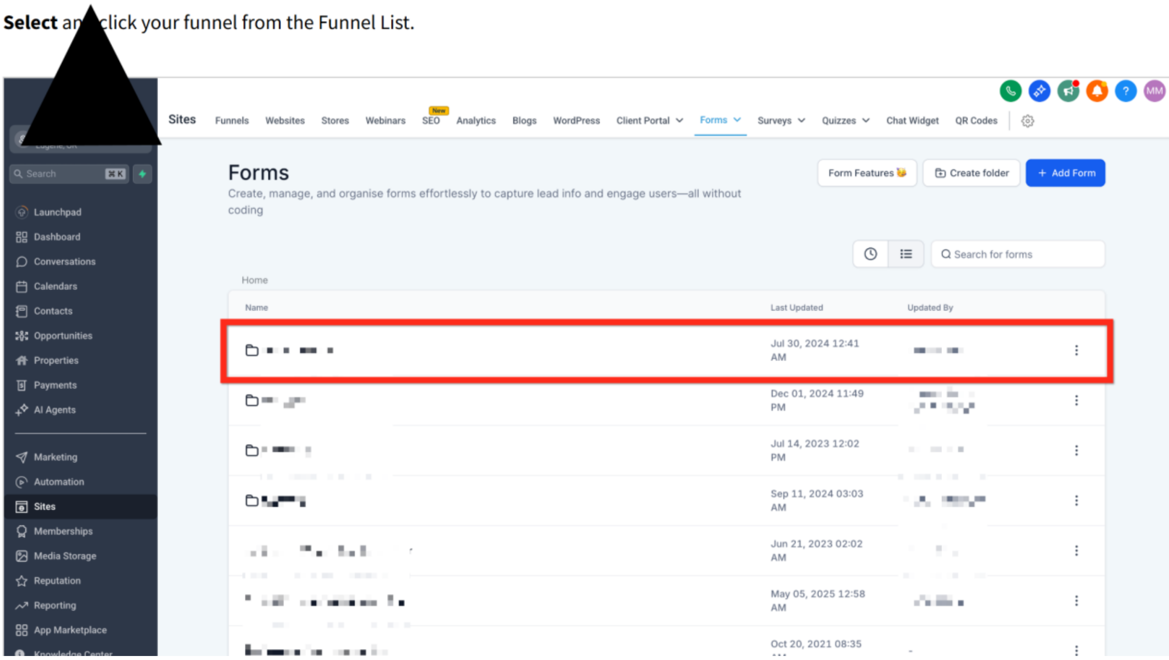
Next step: Optimize your form further with automations to follow up instantly!

Edit an Existing Funnel

Keep your funnels fresh and relevant. Easily update existing funnels to respond quickly to market changes or new strategies.

1. Navigate to **Sites > Funnels**.

2. **Select** and click your funnel from the Funnel List.



1. Make your edits in the **Funnel Editor**.

2. Click **Save**.

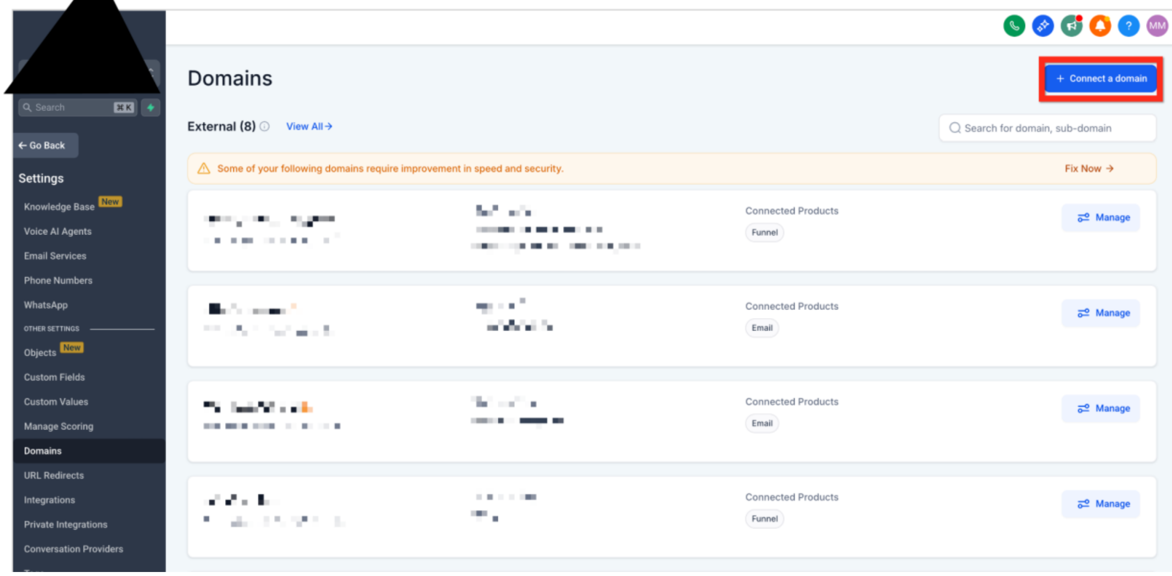
Next step: Why not check analytics to see how well your updates are performing?

Add a Domain to a Funnel

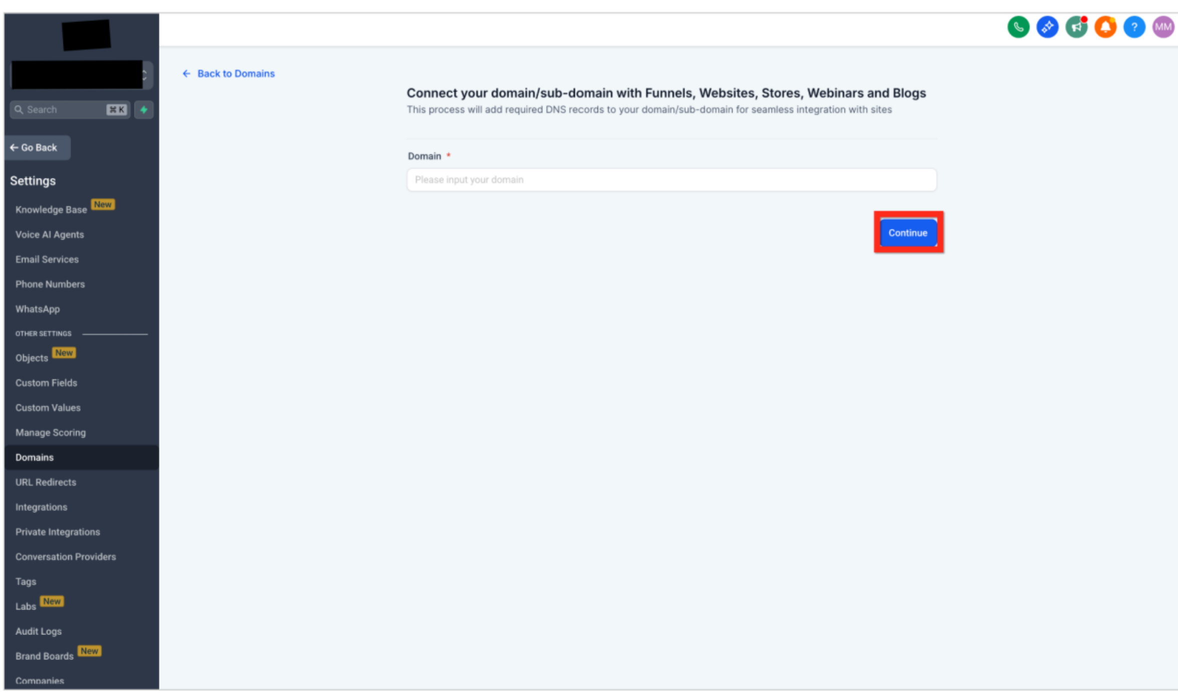
Your funnel deserves a memorable domain. Connect your funnel to your own domain to enhance credibility and professionalism.

1. Go to **Settings > Domains**.

2. Click **Connect a Domain**.

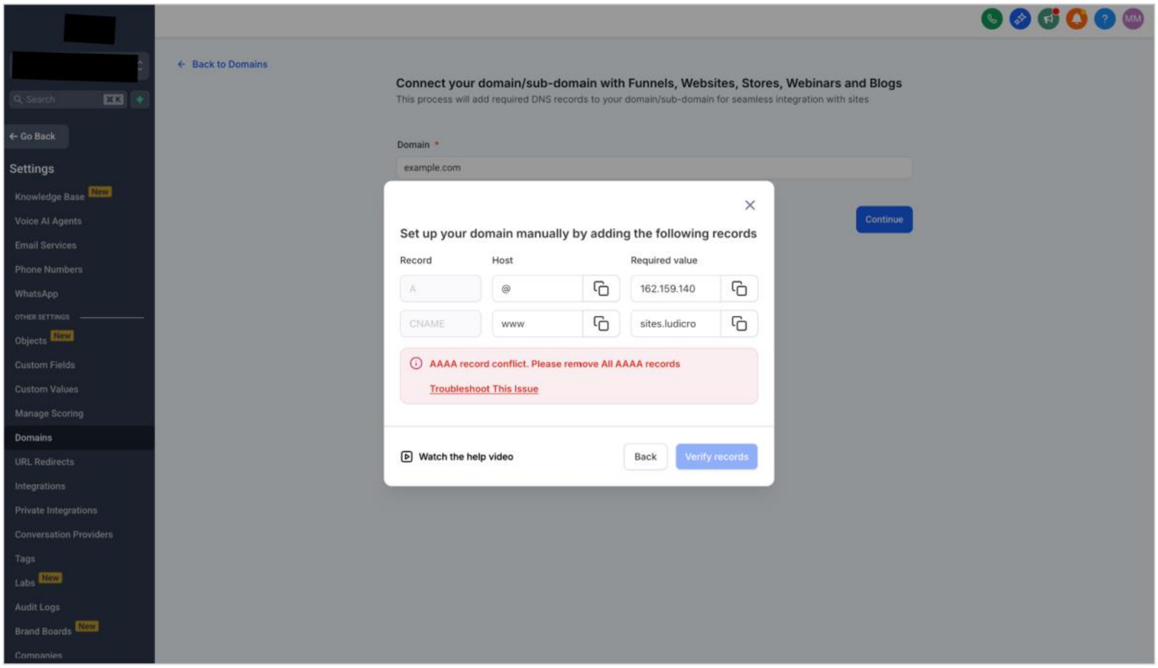


3. Enter your domain and click **Continue**.

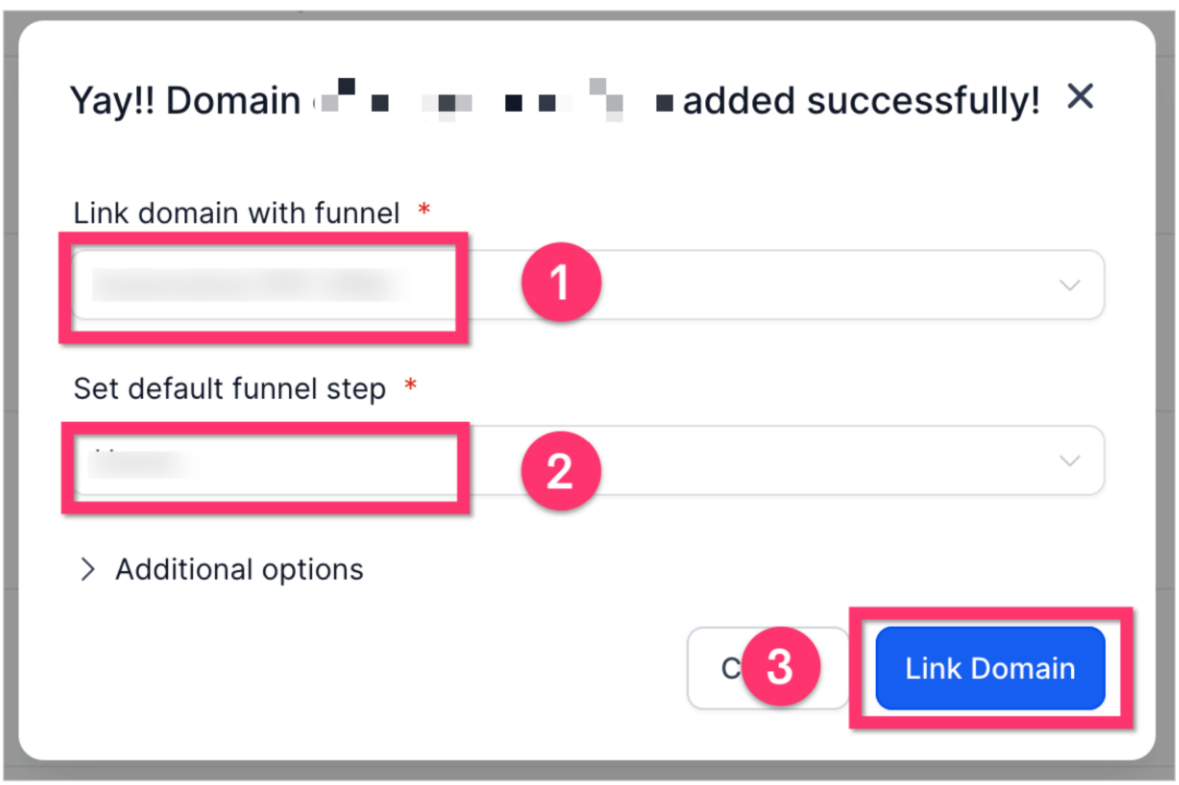


4. Follow the instructions provided to set up **DNS records** (varies by registrar).

5. Click **Verify Records**.



6. Link your domain with the funnel.



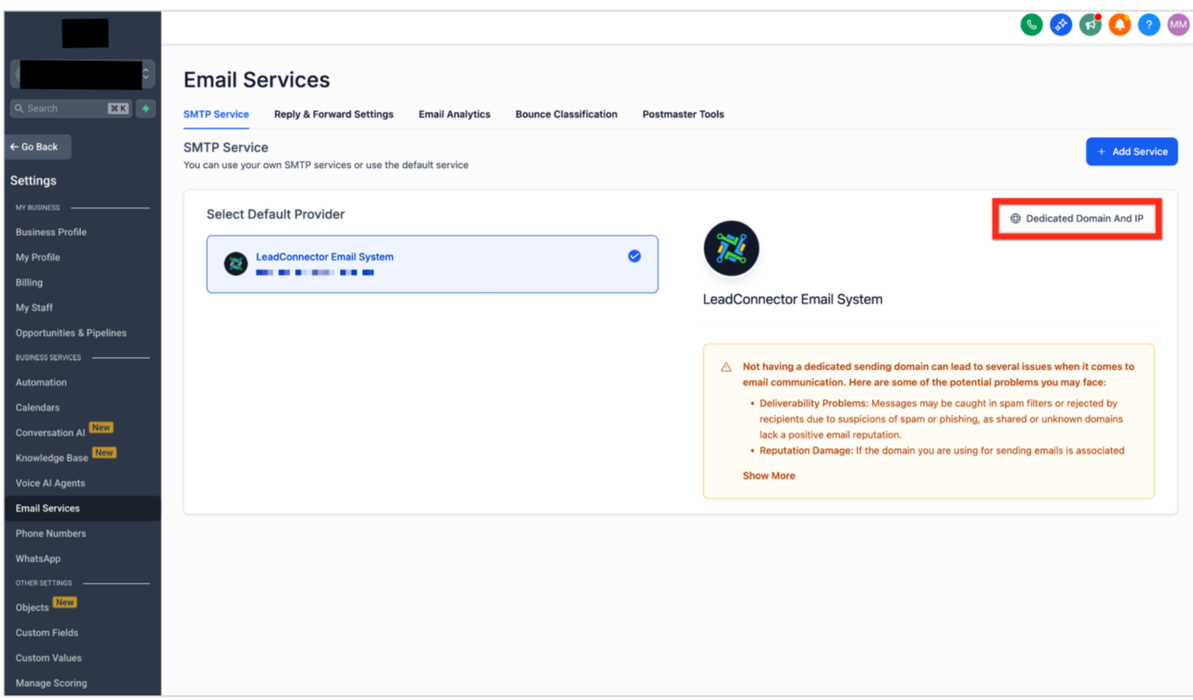
1. Click **Proceed to Finish**.

Ready to amplify your customer communications? Connect your email, SMS, and phone services effortlessly and start engaging your audience on their favorite channels. Boost your response rates and customer satisfaction in just minutes.

Setup Email

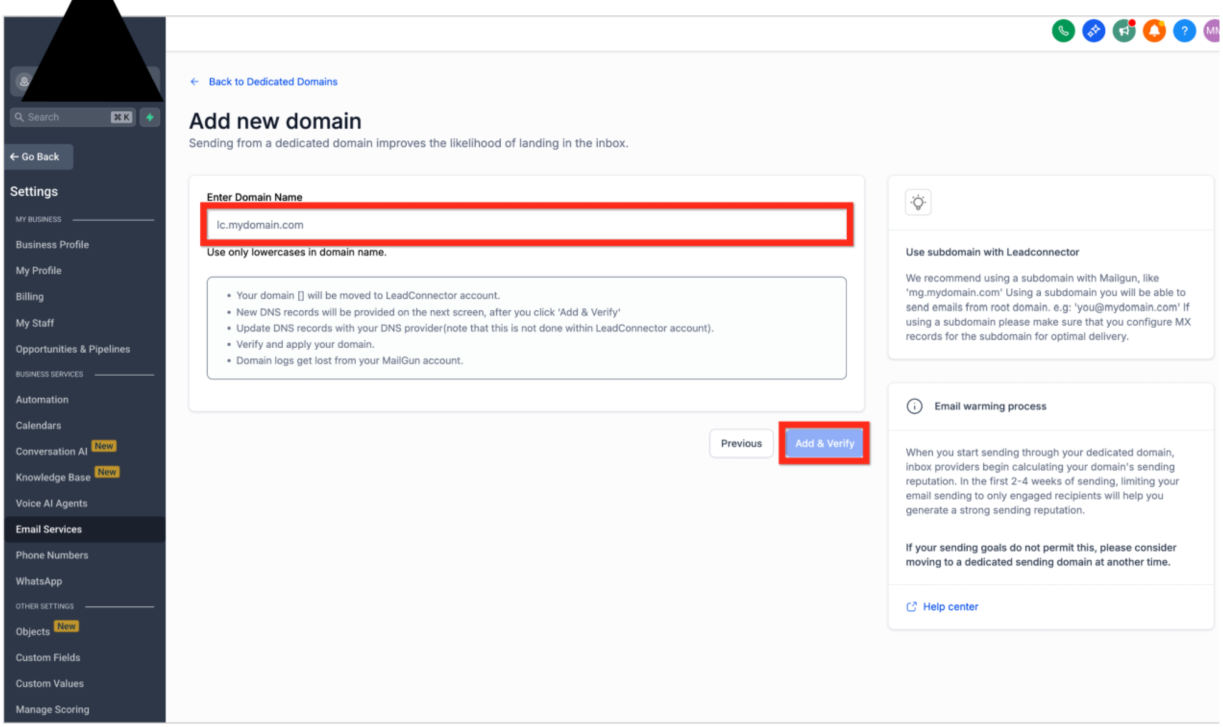
Ensure your messages land in inboxes, not spam folders. Here's a simple way to set up your email service:

- Navigate to **Settings > Email Services**.
- Click Dedicated Domain and IP.
- Click **Create Dedicated Domain**.

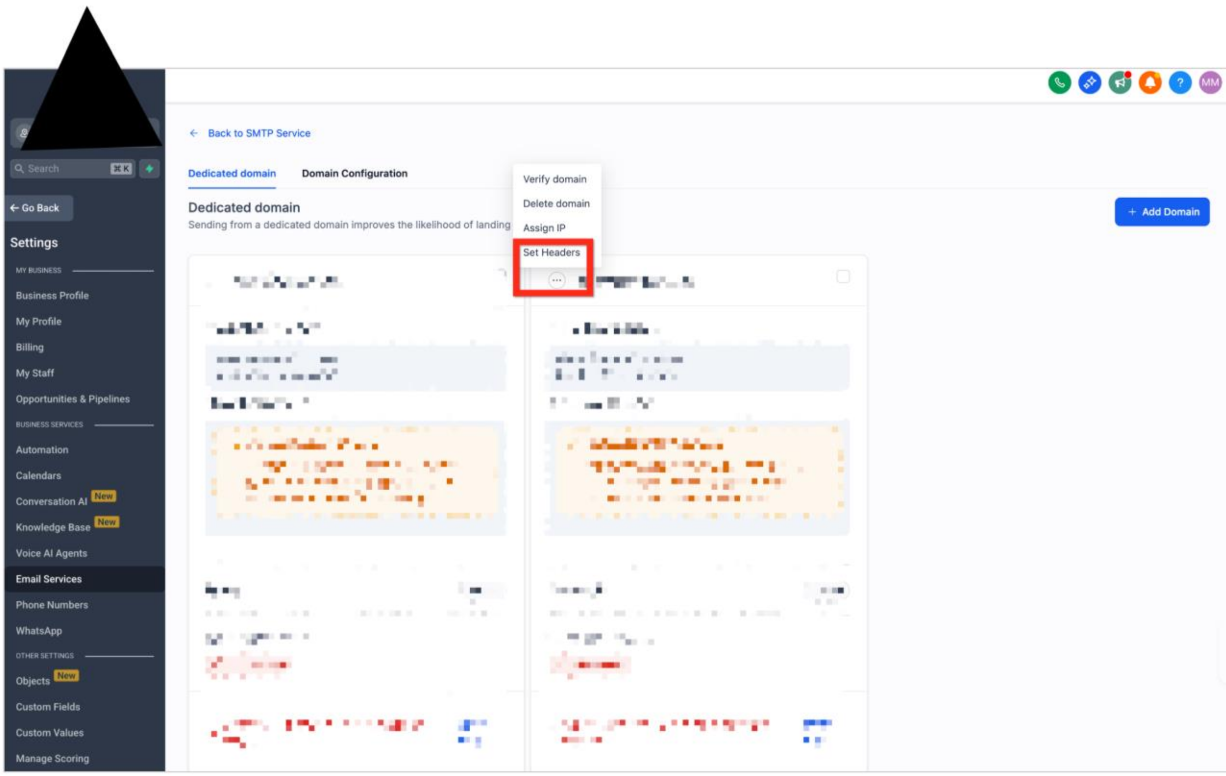


- Click **Add Domain**.

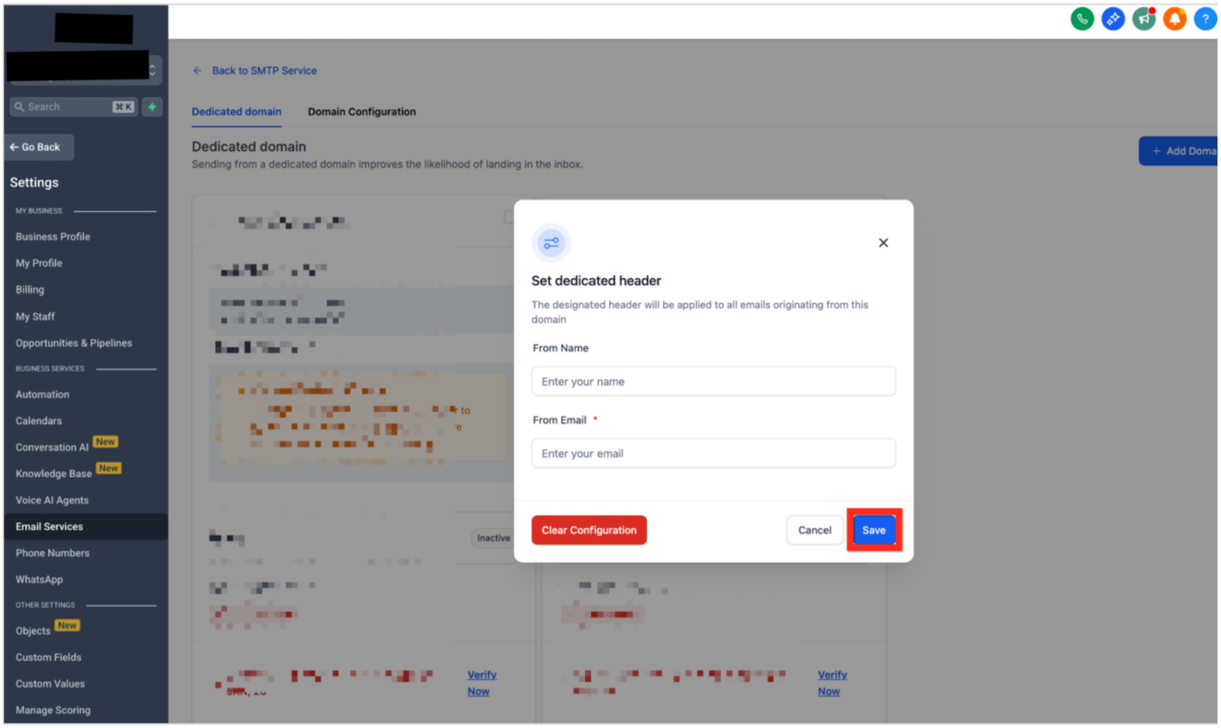
- Enter a subdomain prefix along with your owned domain (e.g., `lc.mydomain.com`).
- Click **Add & Verify**.



- Configure DNS records according to your registrar's instructions.
- Click **Verify Records**.
- Add the additional TXT record provided.
- Click **Verify Domain**.
- Customize your headers by clicking the **3-dot action menu** and selecting **Set Headers**.



- Enter your details (From Name, From Email).
- Click **Save**.



1

Email Services Configuration.pdf

2

Email Best Practices & Email Warm Up.pdf

Sending Priority - From Name & Address.pdf

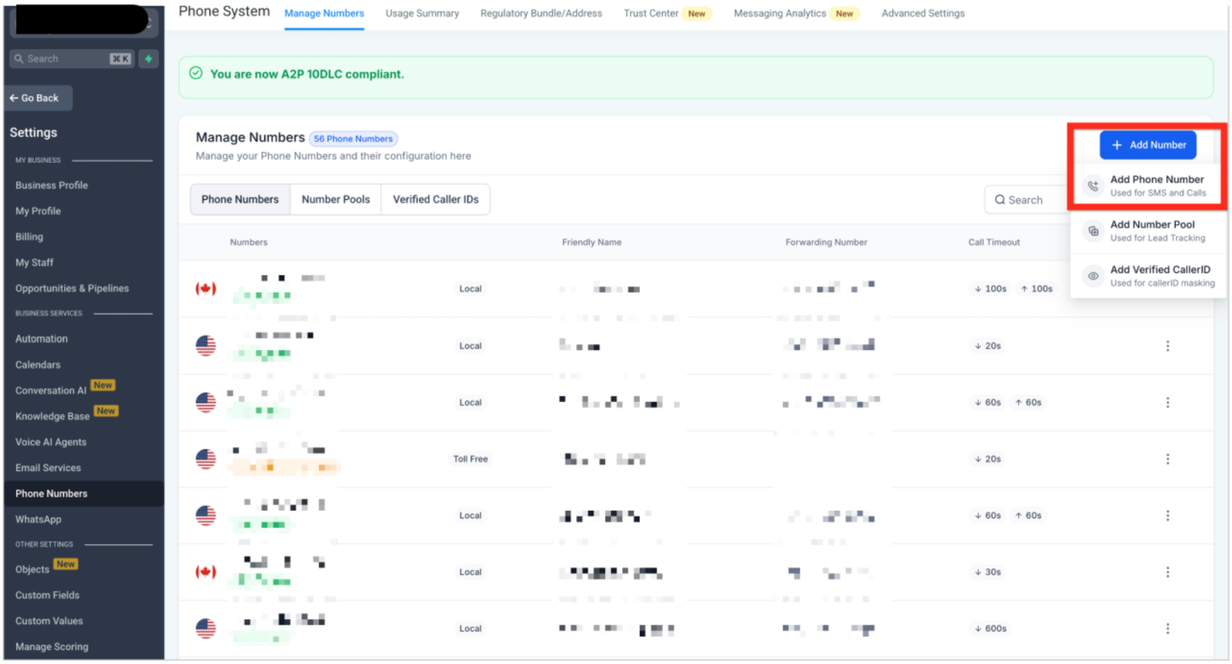
3

Next, you can explore setting up your phone service to enhance your communication capabilities.

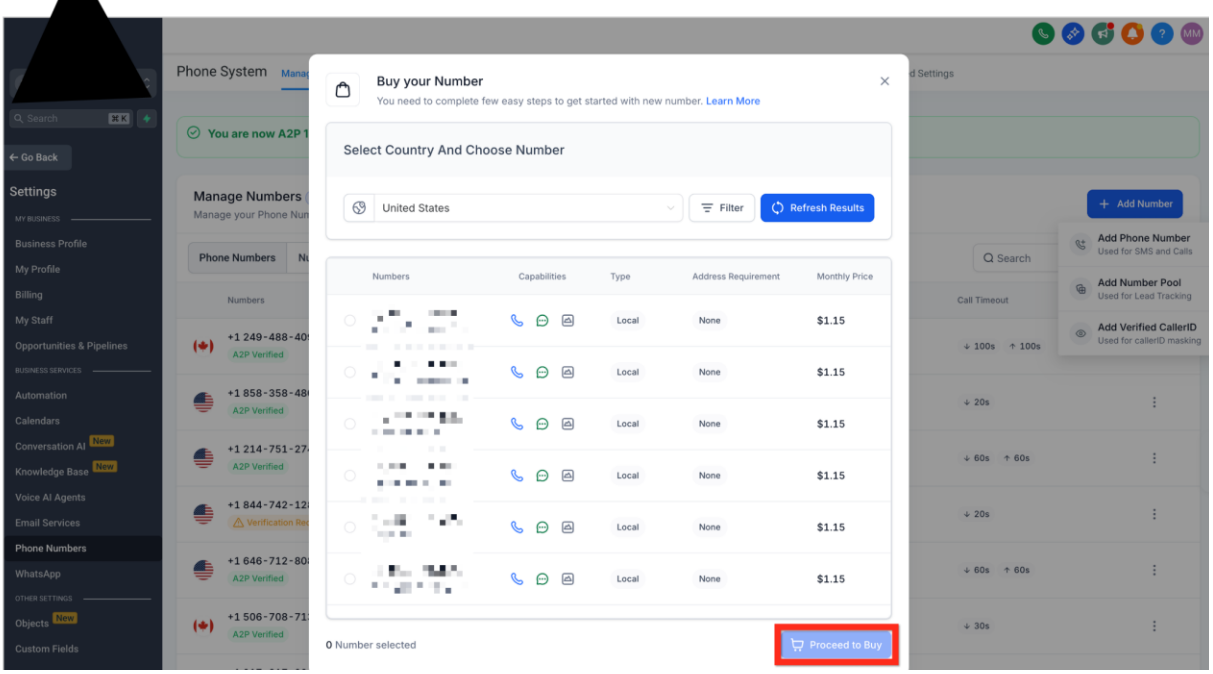
Setup Phone

Want to offer instant, personalized interactions? Add phone numbers swiftly to your platform and be reachable in no time.

- Navigate to **Settings** > **Phone Numbers**.
- Click **Add Number** > **Add Phone Number**.



- Filter numbers by country and area code.
- Select your desired phone number.
- Click **Proceed to Buy**.



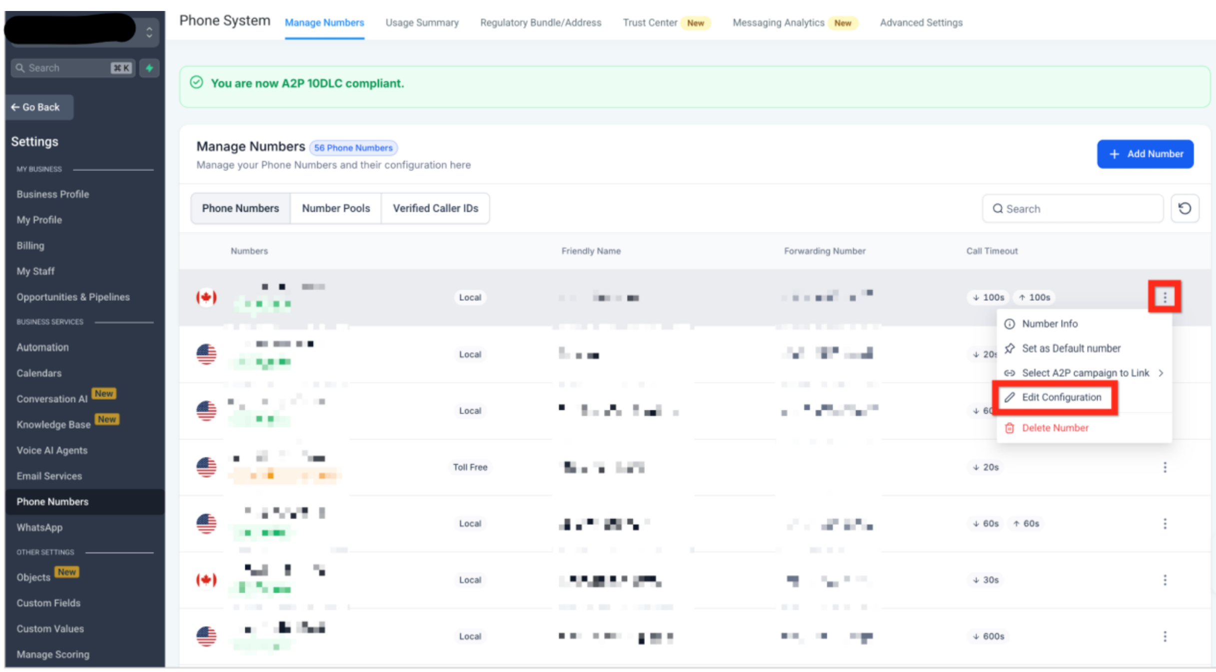
- [to Purchase a Phone Number in a Sub-Account](#)
- [Regulatory Bundle & Address Creation for Sub-Accounts](#)
- [Phone Number Settings Explained](#)

Next, make sure you're ready to handle incoming calls efficiently by setting up call forwarding.

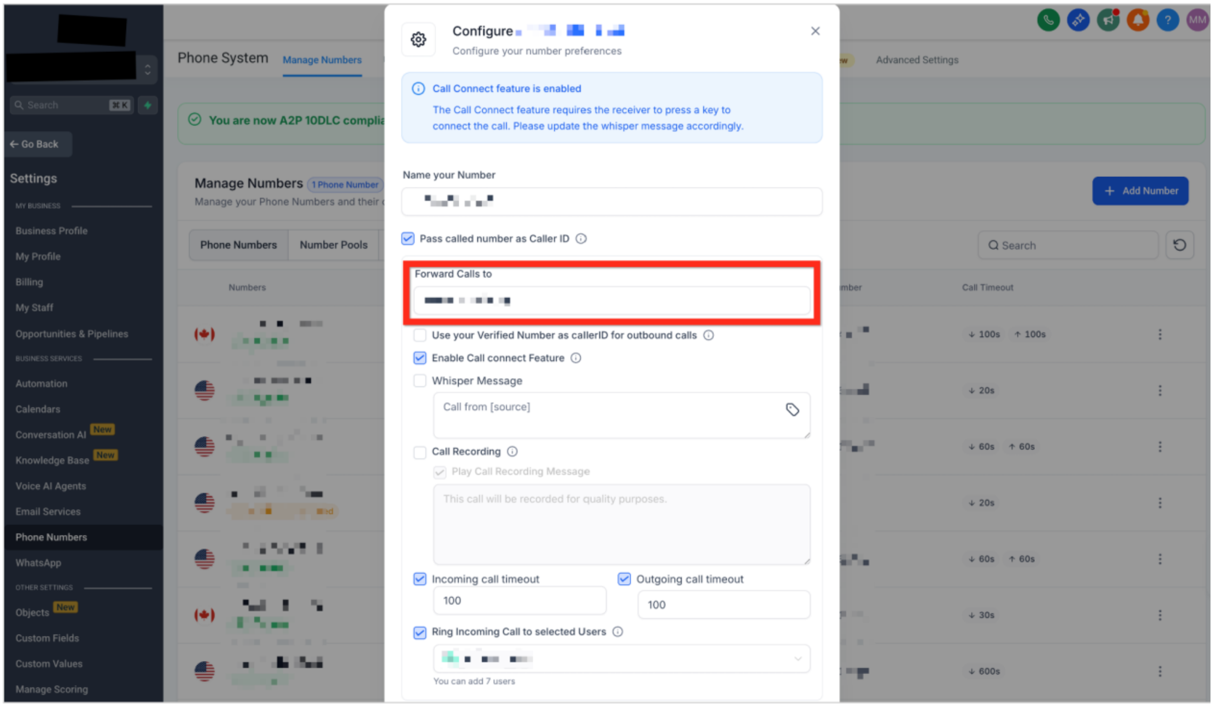
Forward Phone Calls

Stay responsive by directing incoming calls to the number that's most convenient for you:

- Navigate to **Settings > Phone Numbers**.
- Click the **3-dot action menu** next to your phone number.
- Click **Edit Configuration**.



- Enter your preferred forwarding number (e.g., your personal cell).



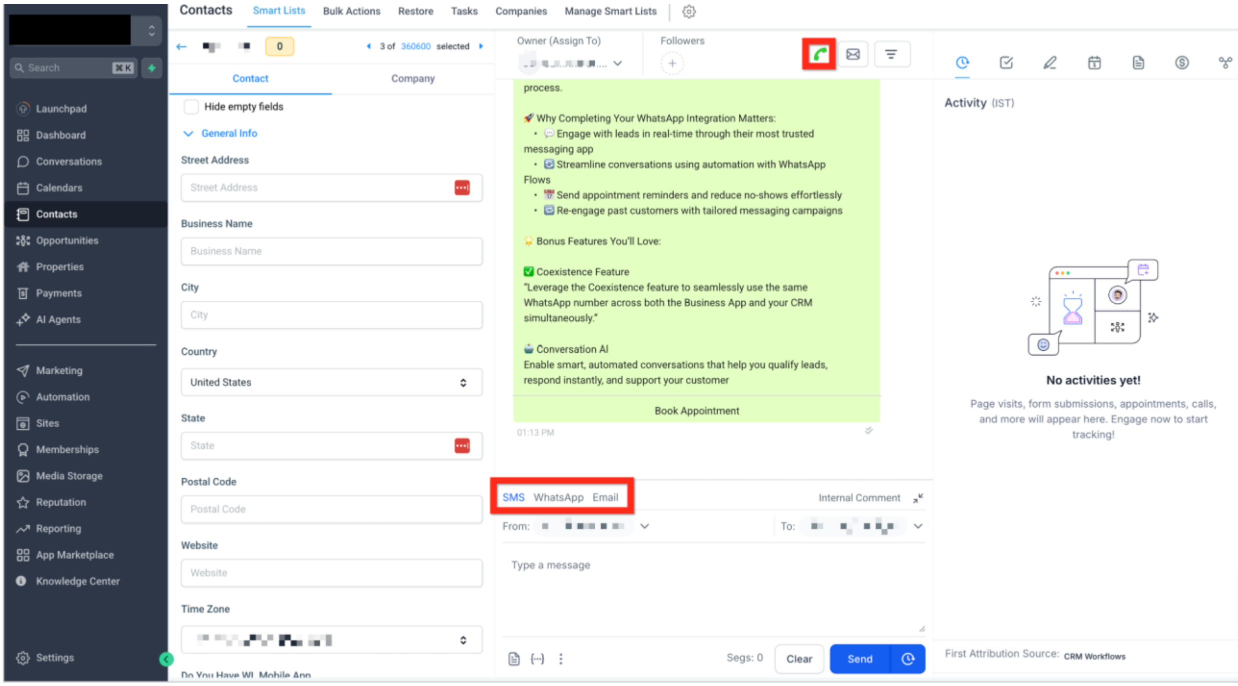
- Click **Save**.

Next, learn how easy it is to initiate direct communication with individual contacts.

Contact a Contact

Quickly reach your contacts through their preferred communication channel:

- Navigate to **Contacts**.
- Browse, filter, or search to find the contact.
- Open the Contact Card:
- **Call:** Click the call connect button (green phone icon in the upper right).
- **SMS:** Select the SMS tab in the message composer (bottom middle).
- **Email:** Select the email tab in the message composer (bottom middle).

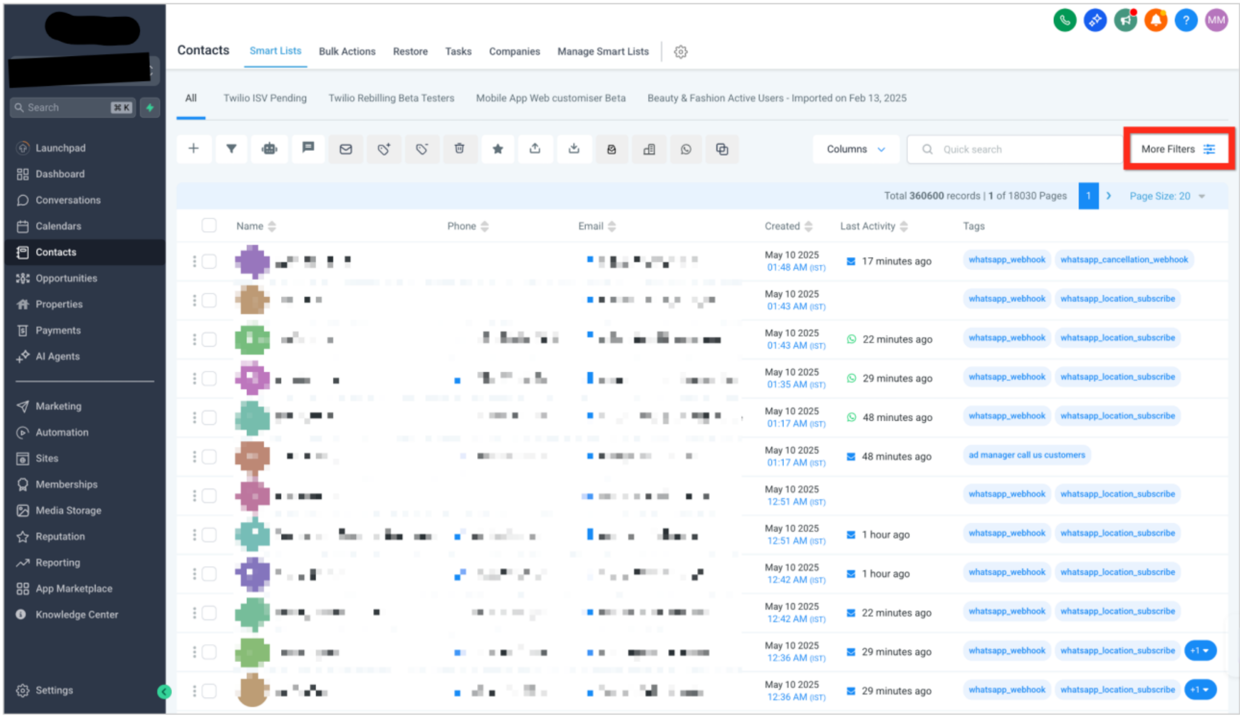


Next, boost your outreach effectiveness by communicating with multiple contacts simultaneously.

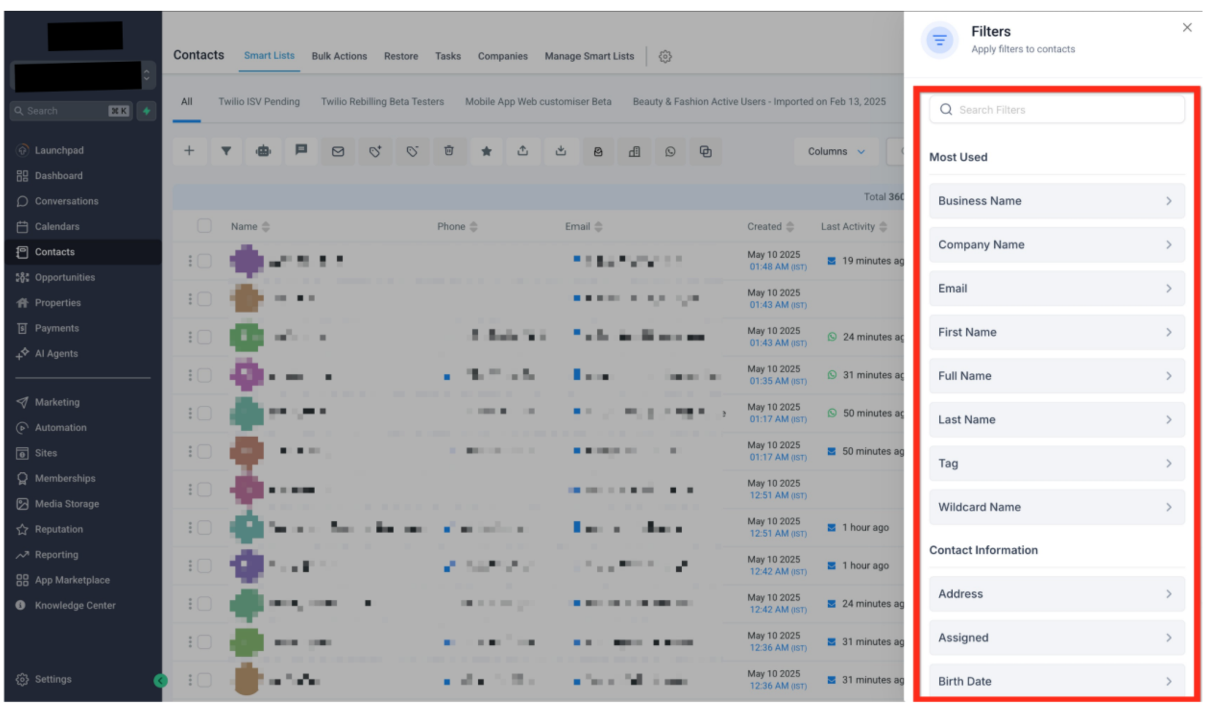
Contact Bulk Contacts

Maximize your reach efficiently with bulk communications:

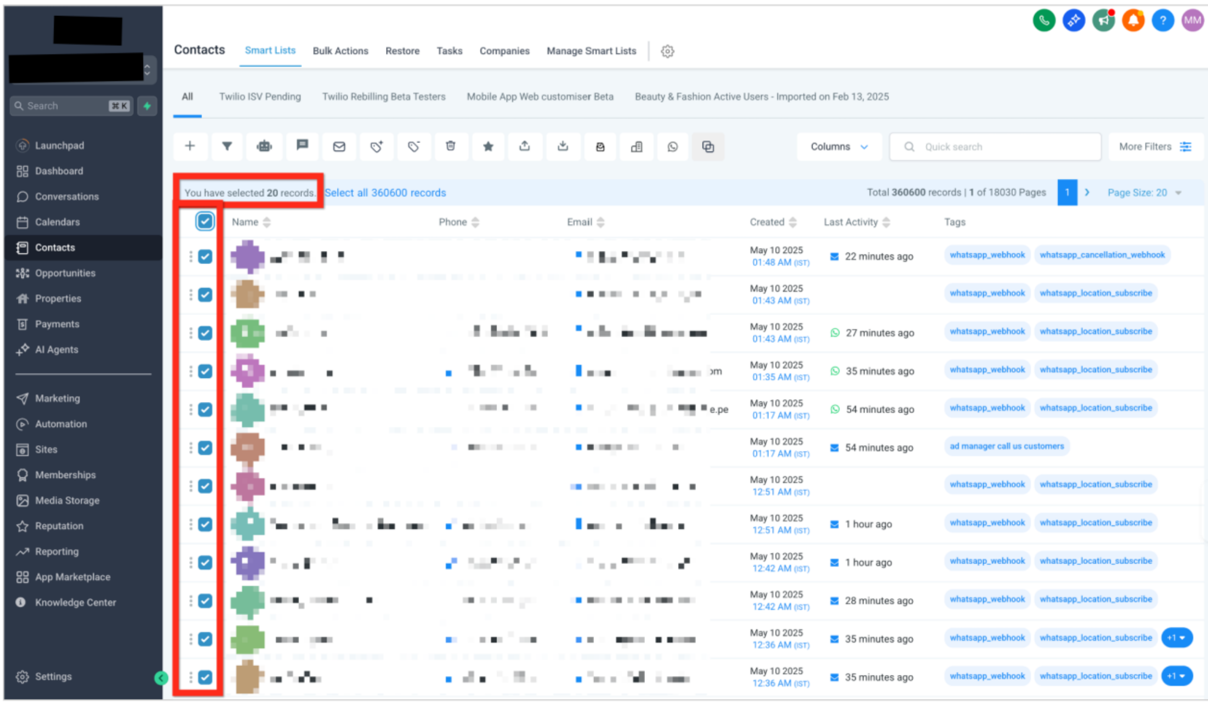
- Navigate to **Contacts**.
- Open **More Filters.**



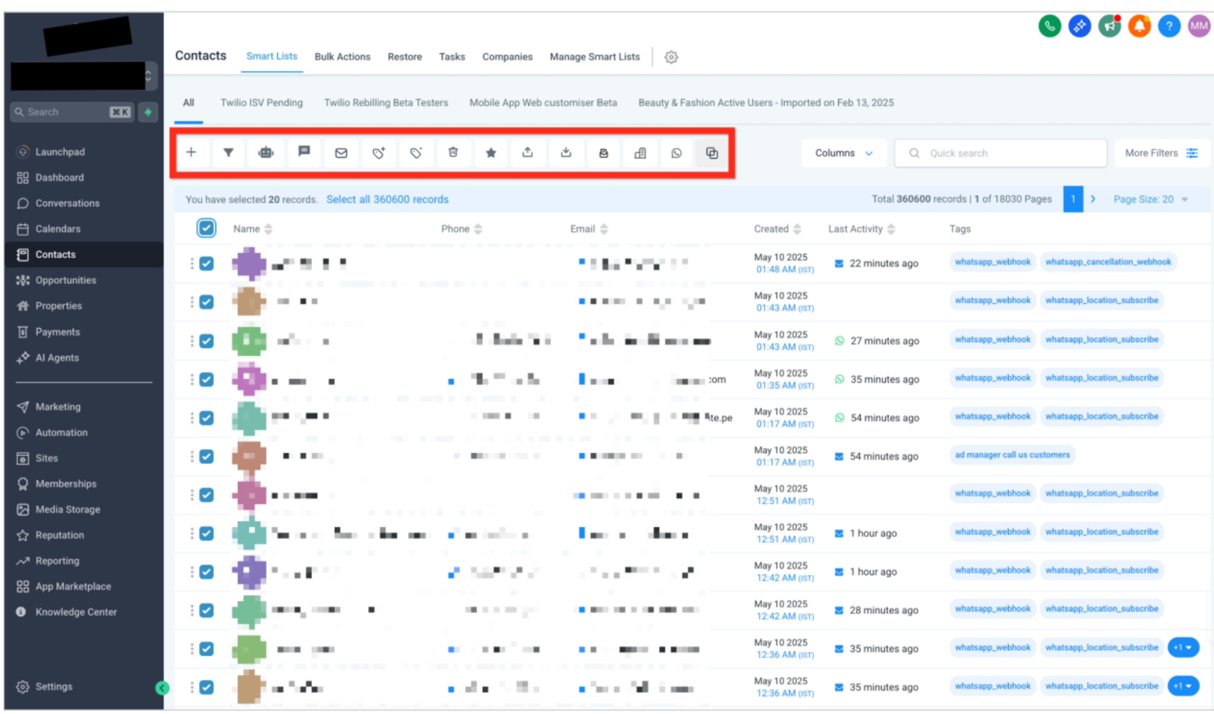
• **Filter** your list to target the right audience.



- Select the **checkbox** next to all desired contacts.



- Choose your **bulk action** (email, SMS, etc.).



Next, continue exploring additional features to refine and enhance your communication strategy!

4 Bulk Actions For Contacts & SmartLists.pdf

Switching Between Channels Choose the best channel for each reply without leaving the thread—ideal for moving a conversation from SMS to email, or adding internal notes. Open the channel selector in the composer to switch between available channels.

توفر هذه الميزة تجربة إعداد إرشادية قائمة على الفيديو لمستخدمي الوكالات، مرحباً بكم في نظرة عامة على منصة الإطلاق لحسابات الوكالات في مما يجعل البدء وتحقيق القيمة أسهل من أي وقت مضى

ما هي منصة الإطلاق لحسابات الوكالات؟

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(SaaSpreneurs) لحسابات الوكالات هي أداة مُصممة خصيصًا لوكالات التسويق ورواد الأعمال في مجال البرمجيات كخدمة LaunchPad منصة فبدلاً من الدخول إلى حساب وكالة جديد دون معرفة الخطوات الأولى، تُرشد هذه المنصة المسؤولين الجدد خلال .HighLevel الذين يستخدمون منصة خطوات الإعداد الأساسية باستخدام مقاطع فيديو تعليمية قصيرة وتوجيهات عملية. يُساعد هذا النهج المستخدمين الجدد على فهم الخطوات التالية، مما .يُقلل من الارتباك ويُسرّع من مسيرتهم نحو النجاح

فبدلاً من .الذين يستخدمون منصة لحسابات الوكالات هي أداة مُصممة خصيصًا لوكالات التسويق ورواد الأعمال في مجال البرمجيات كخدمة منصة الدخول إلى حساب وكالة جديد دون معرفة الخطوات الأولى، تُرشد هذه المنصة المسؤولين الجدد خلال خطوات الإعداد الأساسية باستخدام مقاطع فيديو تعليمية قصيرة وتوجيهات عملية. يُساعد هذا النهج المستخدمين الجدد على فهم الخطوات التالية، مما يُقلل من الارتباك ويُسرّع من مسيرتهم نحو النجاح.

توفر هذه الميزة تجربة إعداد إرشادية قائمة على الفيديو لمستخدمي الوكالات، مما يجعل البدء وتحقيق القيمة أسهل من أي وقت مضى

remove all (AI & 3D Vision) contents . 2- under CCTV tab add the below photos, under new (cctv ai) tab
https://drive.google.com/file/d/1Ne9s5aBKaSKk0MYLy76th0H14okvzw6O/view?usp=drive_link
https://drive.google.com/file/d/15xPFyRxVXfS0YNo-Z01xPwxP_yePrnDB/view?usp=drive_link