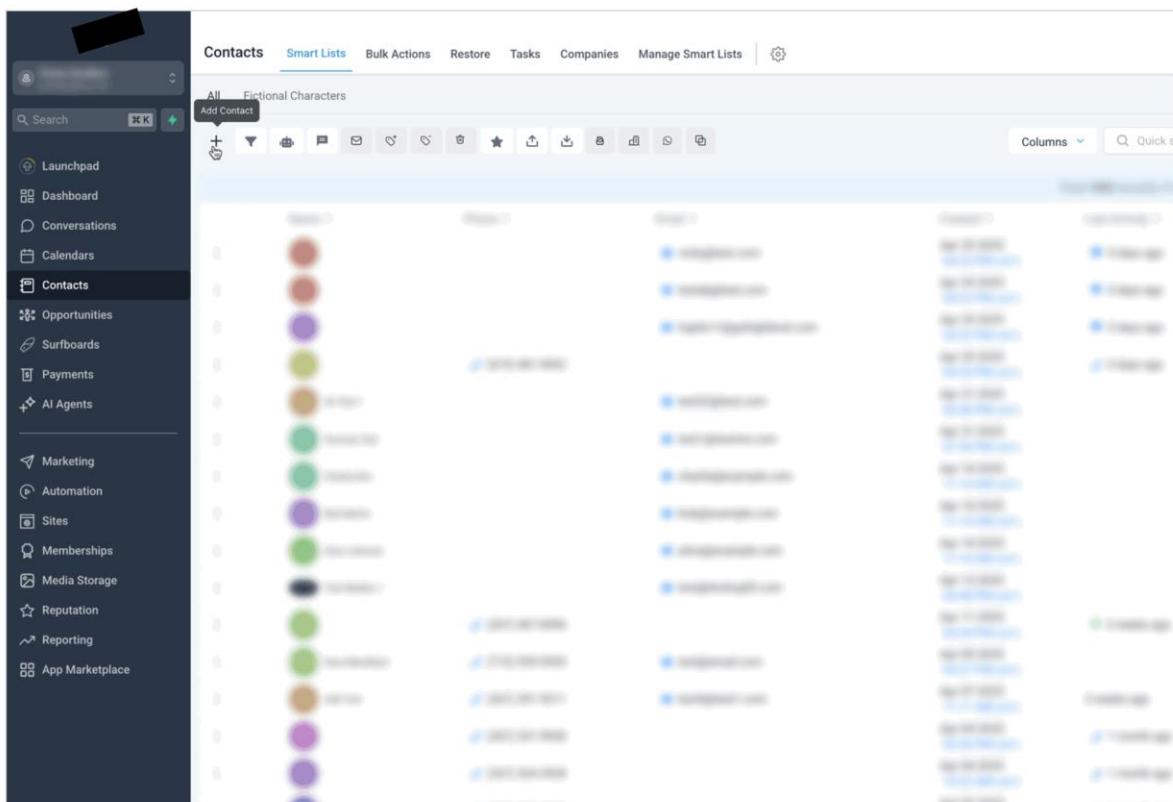
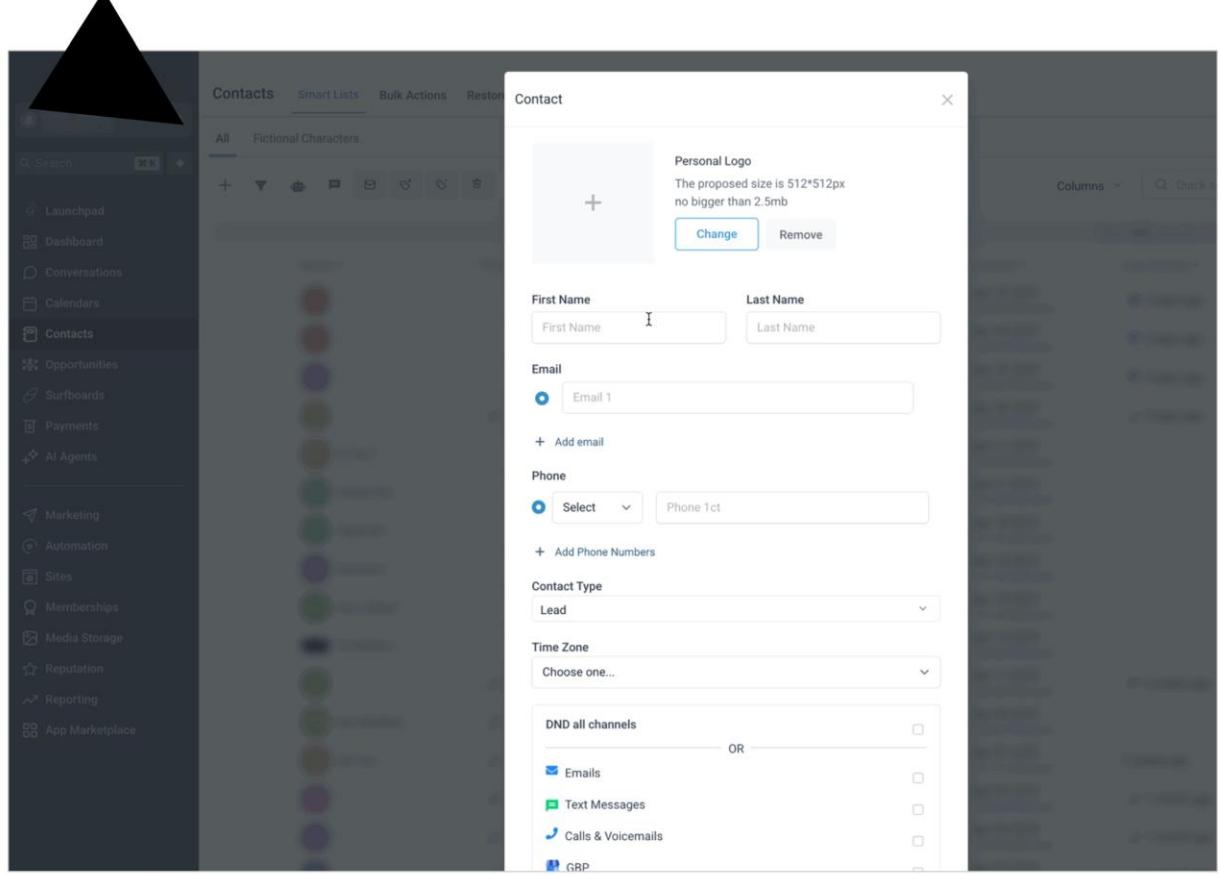


Create New Contact

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**.





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.

The screenshot shows the Zoho CRM interface for managing contacts. On the left is a sidebar with various modules like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Properties, Payments, AI Agents, Marketing, Automation, Sites, Memberships, Media Storage, Reputation, Reporting, App Marketplace, and Knowledge Center. The main area is titled 'Contacts' and shows a list of 360,119 records. The contact highlighted in red has the name 'OO', a purple profile picture, and several activity logs from May 6, 2025. The contact's details include a phone number, email, creation date, last activity, and tags related to WhatsApp webhook and location subscribe.

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.

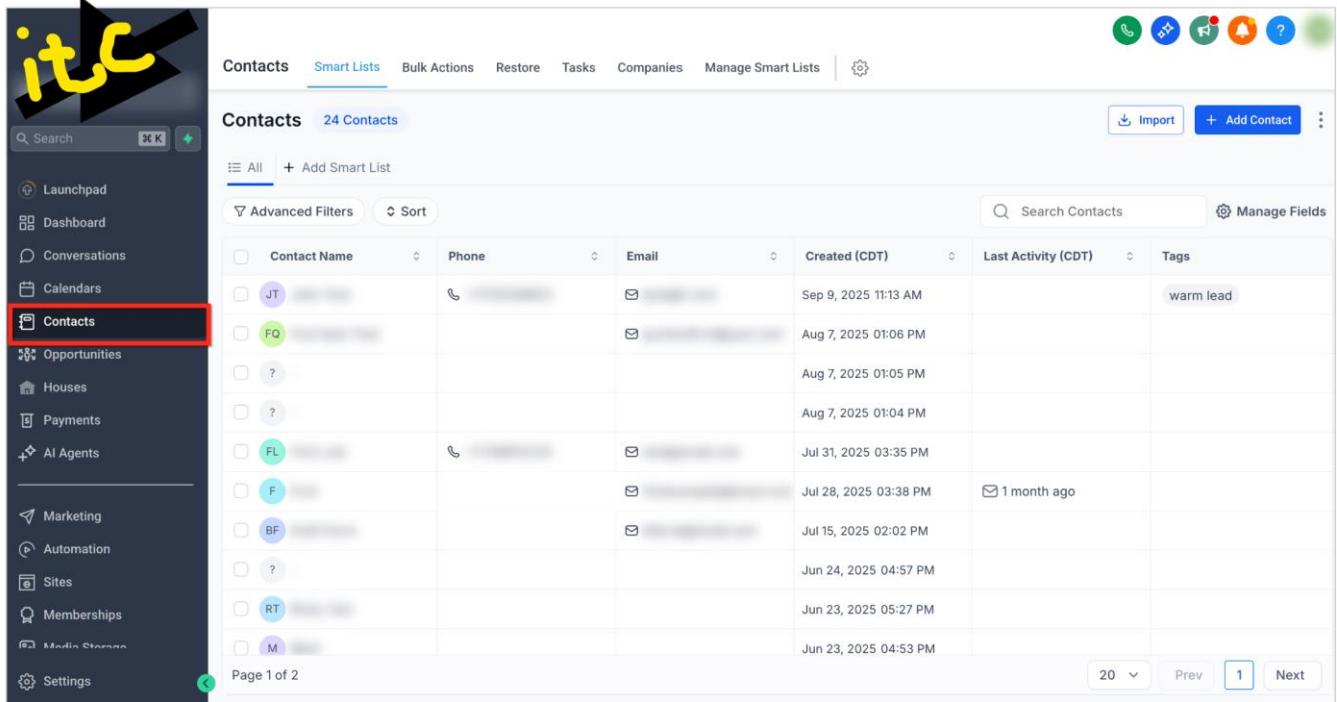
This screenshot shows the 'Edit Contact' screen. The left panel contains a form with fields for Street Address, Business Name, City ('my city'), Country ('United States'), State, Postal Code, Website, and Time Zone. A message overlay indicates a 'New appointment created' on May 8, 2025, at 9:30 AM (CST). The right panel displays a timeline of contact interactions, including 'Contact Created', 'Appointment Booked', and 'Page Visited' entries. At the bottom, there are buttons for 'Cancel' and 'Save'.

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.



The screenshot shows the Zoho CRM interface. On the left, there's a dark sidebar with various menu items like Launchpad, Dashboard, Conversations, Calendars, Opportunities, Houses, Payments, AI Agents, Marketing, Automation, Sites, Memberships, and Settings. The 'Contacts' item is highlighted with a red box. The main area is titled 'Contacts' and shows '24 Contacts'. There's a table with columns for Contact Name, Phone, Email, Created (CDT), Last Activity (CDT), and Tags. The table lists several contacts with their initials and activity dates. At the bottom, it says 'Page 1 of 2'.

Contact Name	Phone	Email	Created (CDT)	Last Activity (CDT)	Tags
JT			Sep 9, 2025 11:13 AM		warm lead
FQ			Aug 7, 2025 01:06 PM		
?			Aug 7, 2025 01:05 PM		
?			Aug 7, 2025 01:04 PM		
FL			Jul 31, 2025 03:35 PM		
F			Jul 28, 2025 03:38 PM	1 month ago	
BF			Jul 15, 2025 02:02 PM		
?			Jun 24, 2025 04:57 PM		
RT			Jun 23, 2025 05:27 PM		
M			Jun 23, 2025 04:53 PM		

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

A screenshot of a CRM application's Contacts page. On the left is a dark sidebar with various navigation options like Launchpad, Dashboard, Conversations, Calendars, Contacts (which is selected and highlighted in blue), Opportunities, Houses, Payments, AI Agents, Marketing, Automation, Sites, Memberships, and Settings. The main area shows a table of contacts with columns for Contact Name, Phone, Email, Created (CDT), Last Activity (CDT), and Tags. A red box highlights the checkbox next to the first contact, 'FO'. Another red box highlights the 'Delete' button at the top right of the table. A red arrow points from the 'Delete' button towards the 'FO' contact row.

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

A screenshot of the same CRM application showing a delete confirmation dialog. The dialog box is centered over the contact list. It contains a red 'Delete' icon, the text 'Delete 1 contact?', a note stating 'Deleted contacts can be restored within 2 months', and a warning about the permanent removal of associated data. A red box highlights the input field where 'DELETE' should be typed. Another red box highlights the 'Delete' button at the bottom right of the dialog. A red arrow points from the 'Delete' button in the dialog towards the 'Delete' button in the top right of the main table.

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 X +

customField.tabs.allFields customField.tabs.folders customField.tabs.deletedFields Add Folder

← 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
- Comments

Search X +

Dashboard 2025-04-05 → 2025-0

+ Quick Filters

Contacts Count

13

Opportunity Value

\$0 + 0% vs Last 31 Days

No Data Found

Conversion Rate

0 + 0% vs Last 31 Days

Won \$0

Funnel

\$0 + 0% vs Last 31 Days

2x1 Rug Cleaning

Step	Cumulative	Next Step Conversion
New Lead	0.00%	100.00%
Hot Lead	0.00%	0.00%
Consult Booked	0.00%	0.00%
Verbal Yes	0.00%	0.00%
Proposal Signed	0.00%	0.00%
Invoice Paid	0.00%	0.00%
Won	0.00%	0.00%

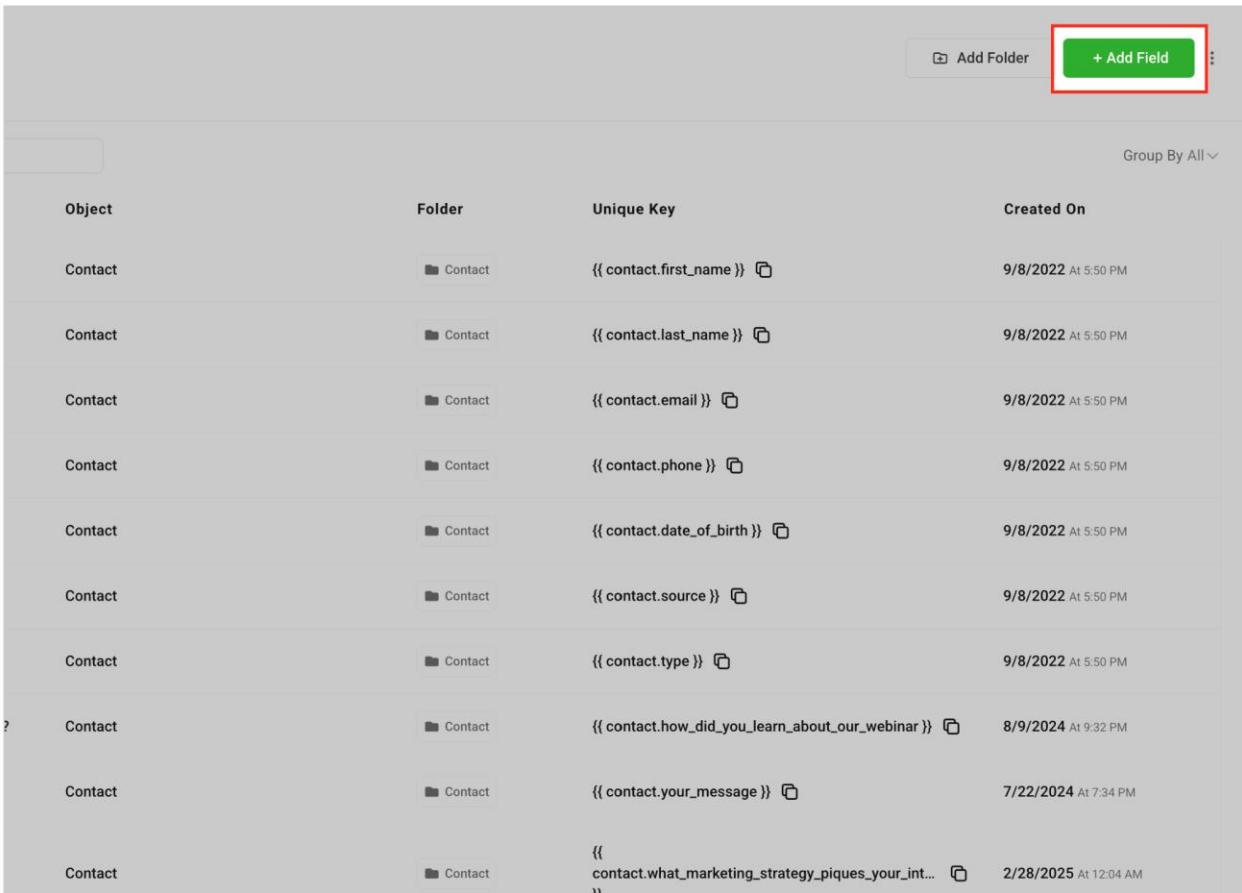
Stage Distribution

2x1 Rug Clean

No Data Found

Settings

2. Click **Add Field**.

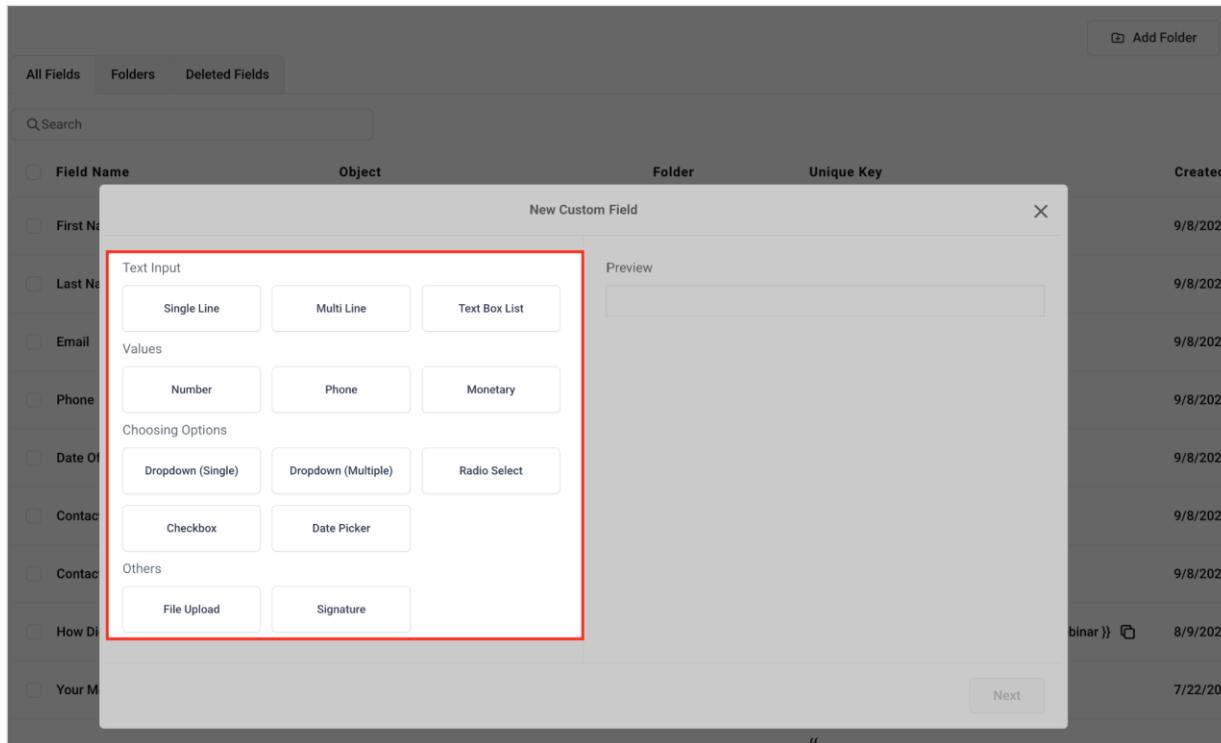


The screenshot shows a software interface with a list of contacts. At the top right, there is a green button labeled '+ Add Field' with a red box drawn around it. Below the button, there are other options: 'Add Folder' and a three-dot menu icon. A 'Group By All' dropdown is also visible. The main area displays a table with columns: Object, Folder, Unique Key, and Created On. The data rows represent various contact fields, such as first_name, last_name, email, phone, date_of_birth, source, type, how_did_you_learn_about_our_webinar, your_message, and what_marketing_strategy_piques_your_interest. Each row includes a small icon for the folder and a delete icon.

Object	Folder	Unique Key	Created On
Contact	📁 Contact	{{ contact.first_name }}	9/8/2022 At 5:50 PM
Contact	📁 Contact	{{ contact.last_name }}	9/8/2022 At 5:50 PM
Contact	📁 Contact	{{ contact.email }}	9/8/2022 At 5:50 PM
Contact	📁 Contact	{{ contact.phone }}	9/8/2022 At 5:50 PM
Contact	📁 Contact	{{ contact.date_of_birth }}	9/8/2022 At 5:50 PM
Contact	📁 Contact	{{ contact.source }}	9/8/2022 At 5:50 PM
Contact	📁 Contact	{{ contact.type }}	9/8/2022 At 5:50 PM
? Contact	📁 Contact	{{ contact.how_did_you_learn_about_our_webinar }}	8/9/2024 At 9:32 PM
Contact	📁 Contact	{{ contact.your_message }}	7/22/2024 At 7:34 PM
Contact	📁 Contact	{{ contact.what_marketing_strategy_piques_your_interest }}	2/28/2025 At 12:04 AM

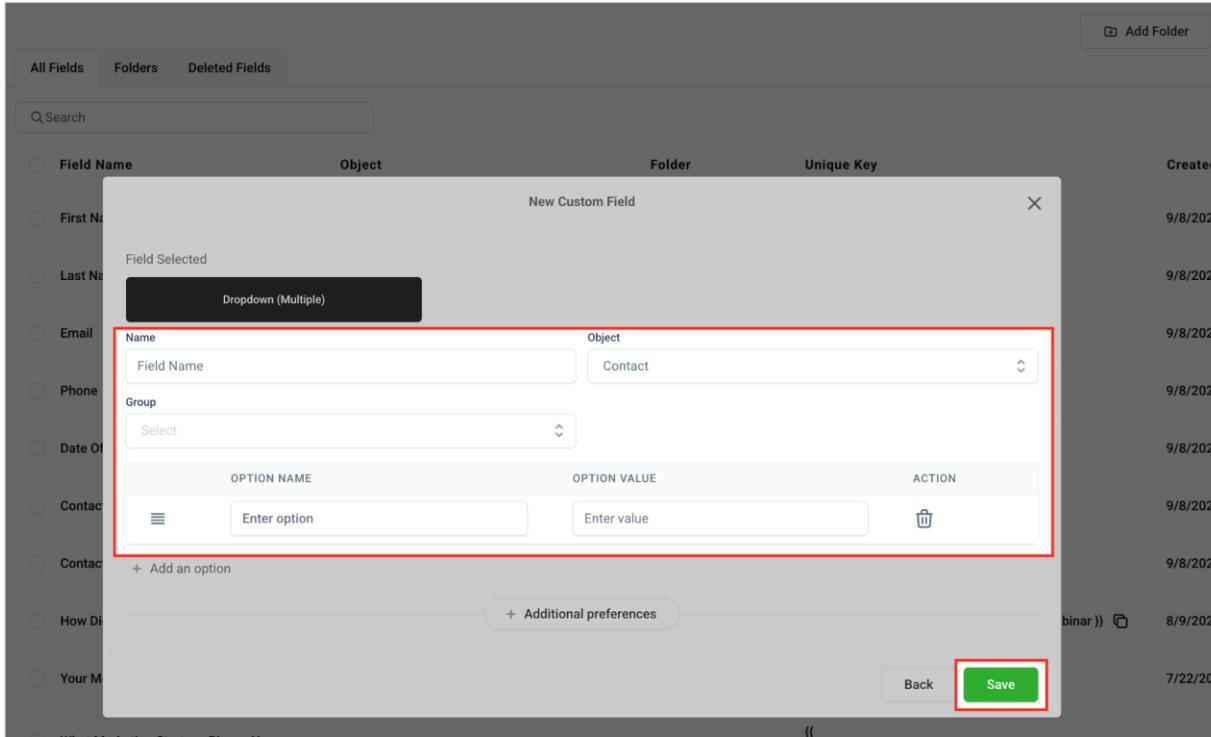
3. Choose the **type** of field you want to create (e.g., text, dropdown, date).

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**.

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



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).

A screenshot of the Salesforce Contacts page. On the left is a dark sidebar with various navigation options. The main area shows a list of contacts with columns for Contact Name, Phone, Email, Created (CST), Last Activity (CST), and Tags. At the top right of the list area is a blue button labeled "Import" with a downward arrow icon, which is highlighted with a red box and a red arrow pointing to it.

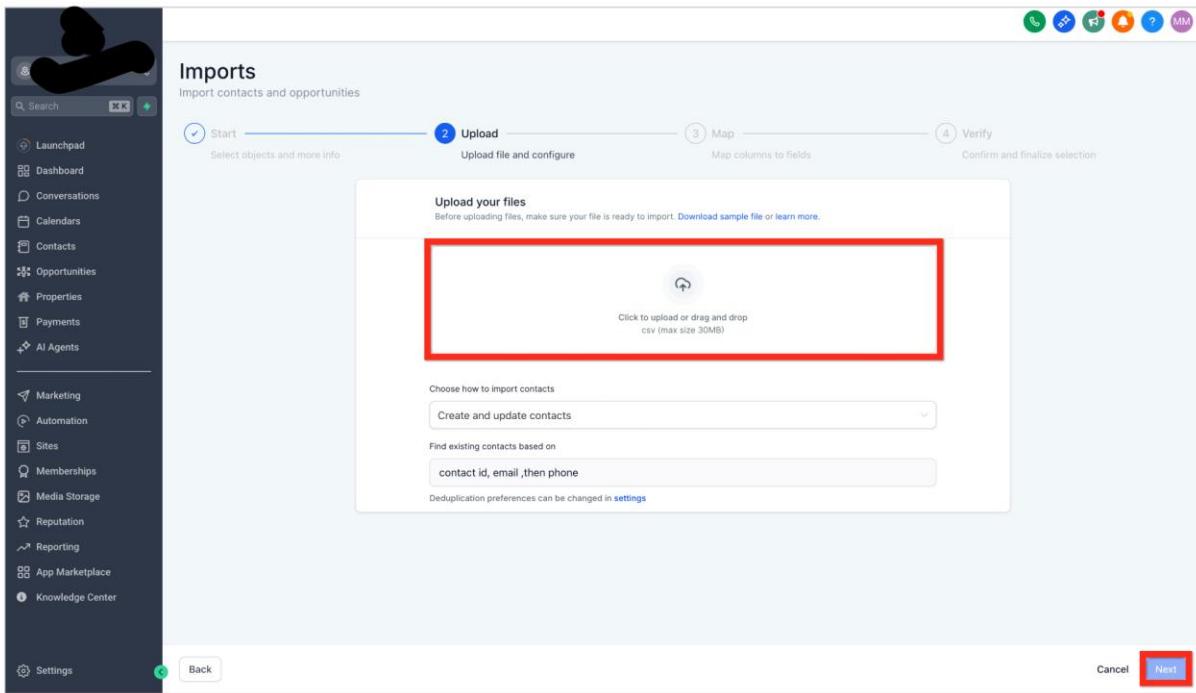
1.

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

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

A screenshot of the "Imports" step 1 page. The sidebar on the left is identical to the previous screenshot. The main area has four numbered steps: 1. Start (Select objects and more info), 2. Upload (Upload file and configure), 3. Map (Map columns to fields), and 4. Verify (Confirm and finalize selection). Step 1 is active. Below the steps is a section titled "Select objects to start importing" with two checkboxes: "Contacts" (which is checked) and "Opportunities". A large black triangle points upwards from the bottom of the previous screenshot towards this section. At the bottom right of the page is a blue "Next" button, which is highlighted with a red box.

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

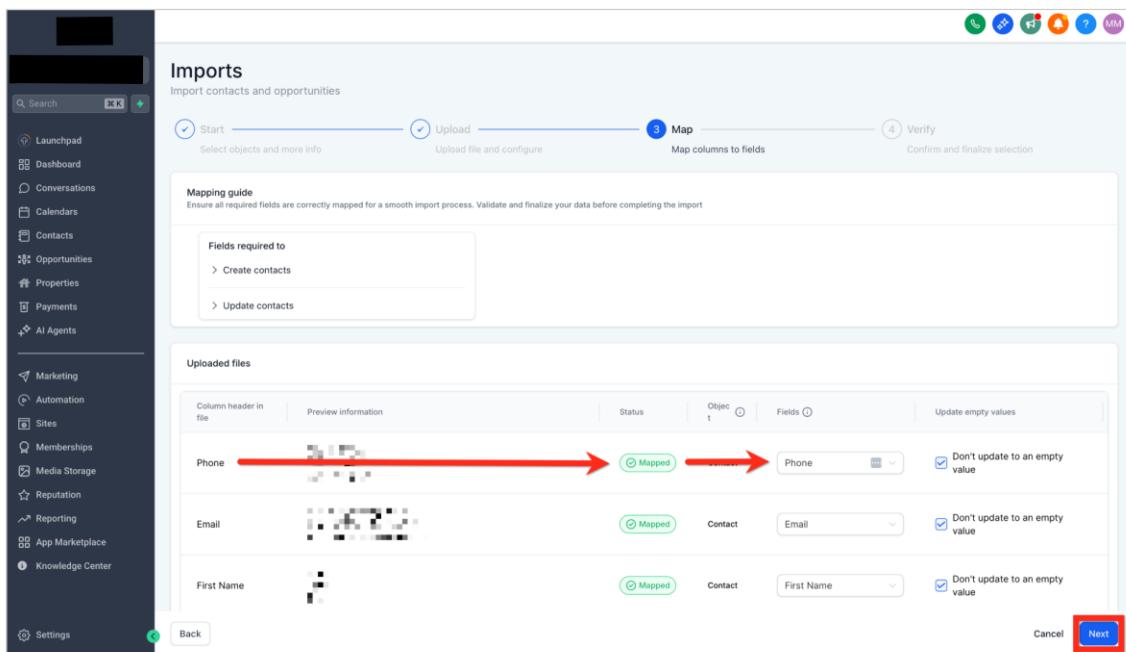
- Time Zone
- Website
- Additional Email
- Additional Phones
- Notes

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".

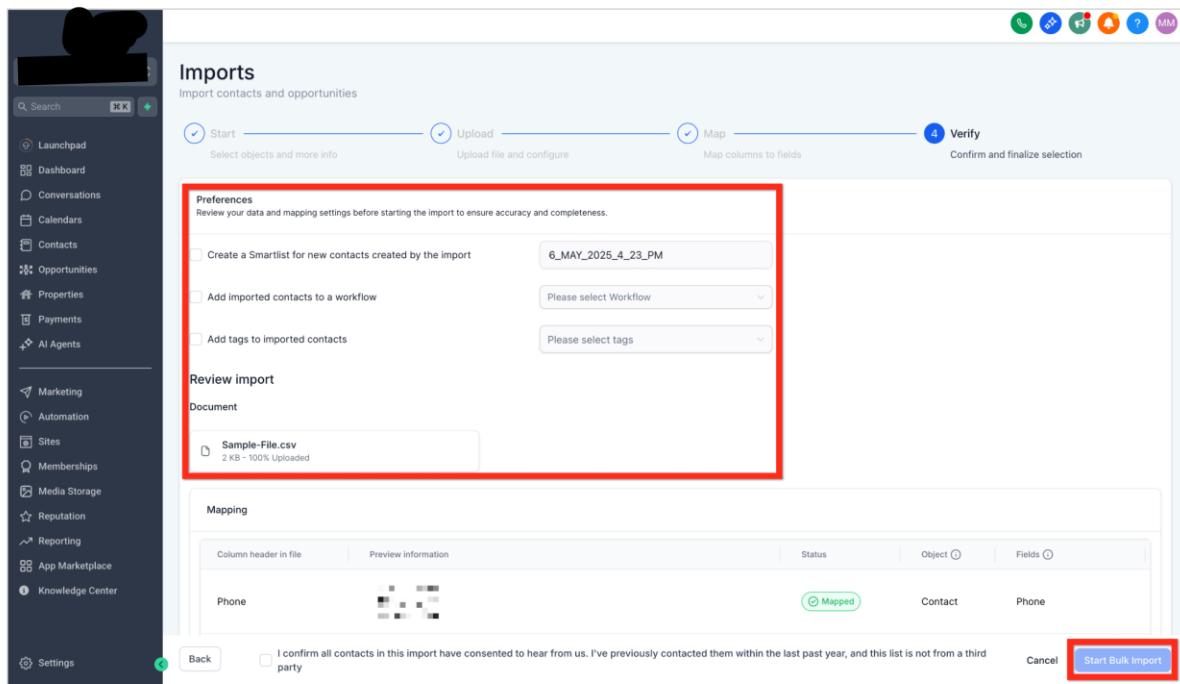
6. Map your file columns to corresponding Contact fields.

- 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.

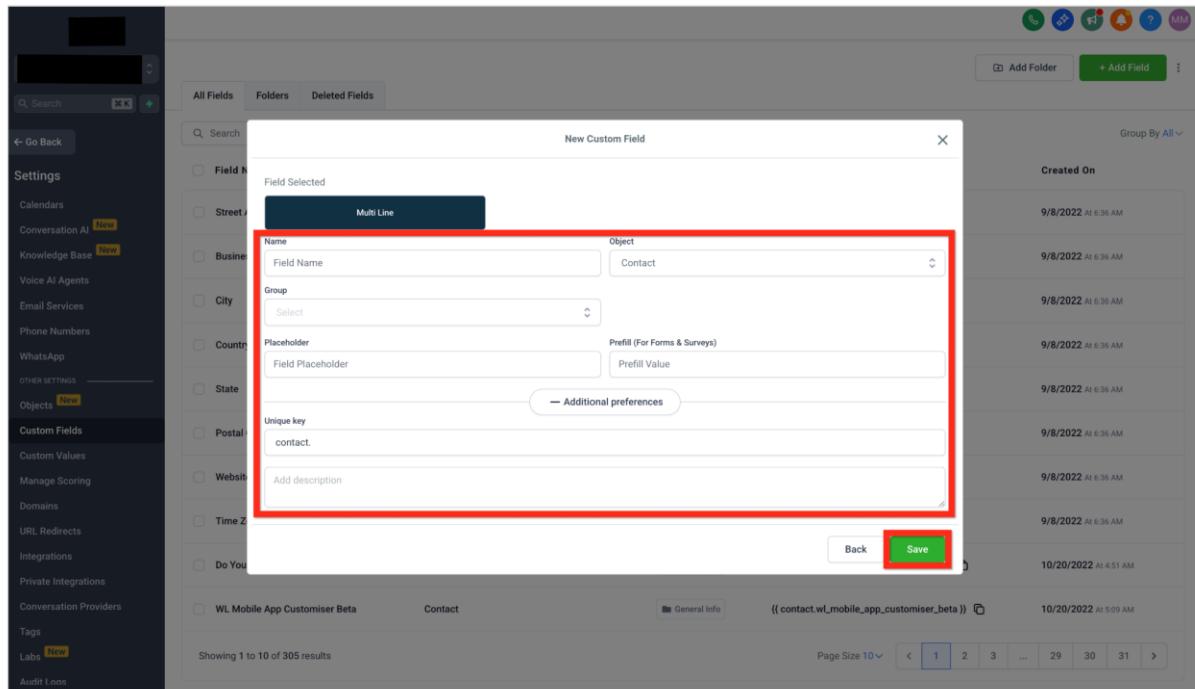
Here's how to set up your custom fields:

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

All Fields					Add Folder	+ Add Field
<input type="text"/> Search					Group By All	
Field Name	Object	Folder	Unique Key	Created On		
Street Address	Contact	General Info	{{ contact.address1 }}	9/8/2022 At 6:36 AM		
Business Name	Contact	General Info	{{ contact.company_name }}	9/8/2022 At 6:36 AM		
City	Contact	General Info	{{ contact.city }}	9/8/2022 At 6:36 AM		
Country	Contact	General Info	{{ contact.country }}	9/8/2022 At 6:36 AM		
State	Contact	General Info	{{ contact.state }}	9/8/2022 At 6:36 AM		
Postal Code	Contact	General Info	{{ contact.postal_code }}	9/8/2022 At 6:36 AM		
Website	Contact	General Info	{{ contact.website }}	9/8/2022 At 6:36 AM		
Time Zone	Contact	General Info	{{ contact.timezone }}	9/8/2022 At 6:36 AM		
Do You Have WL Mobile App	Contact	General Info	{{ contact.do_you_have_wl_mobile_app }}	10/20/2022 At 4:51 AM		
WL Mobile App Customiser Beta	Contact	General Info	{{ contact.wl_mobile_app_customiser_beta }}	10/20/2022 At 5:09 AM		
Showing 1 to 10 of 305 results					Page Size 10	< 1 2 3 ... 29 30 31 >

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**.

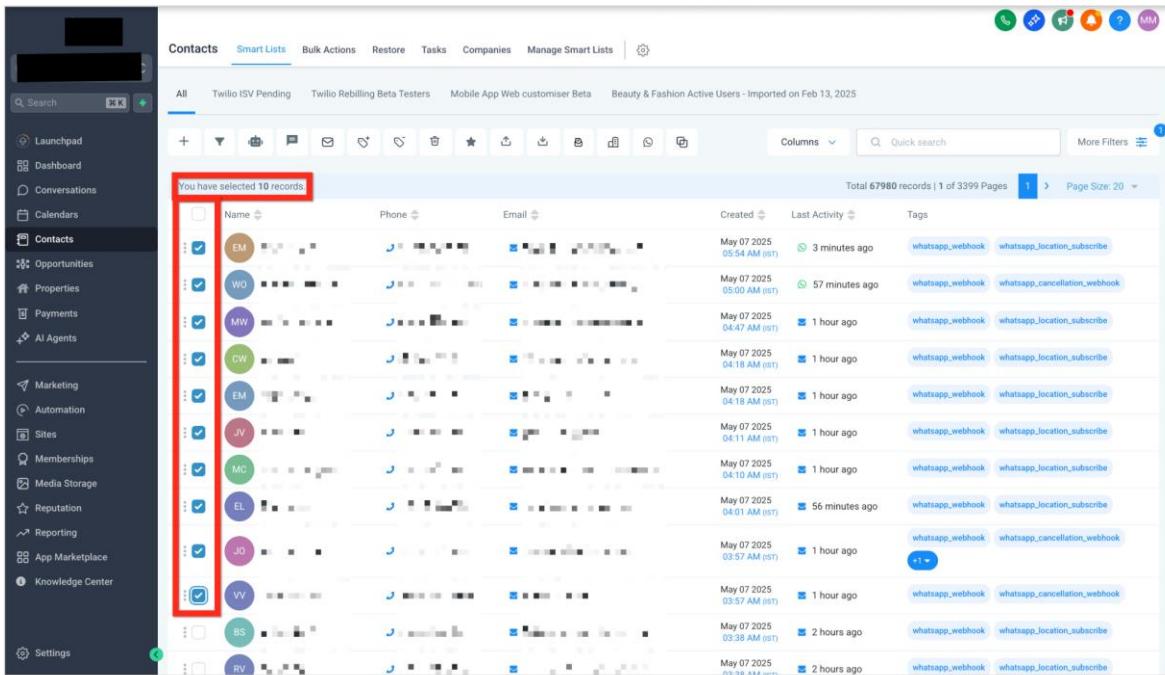
1. Navigate to Contacts.

This screenshot shows the Zoho CRM interface for the 'Contacts' module. On the left is a dark sidebar with various navigation options like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Properties, Payments, AI Agents, Marketing, Automation, Sites, Memberships, Media Storage, Reputation, Reporting, App Marketplace, and Knowledge Center. The main area displays a grid of contact records. Each record includes a small profile picture, the contact's name, phone number, email address, creation date, last activity time, and a list of tags. A red box highlights the 'More Filters' button in the top right corner of the contact list header.

2. Apply filters to narrow down your audience.

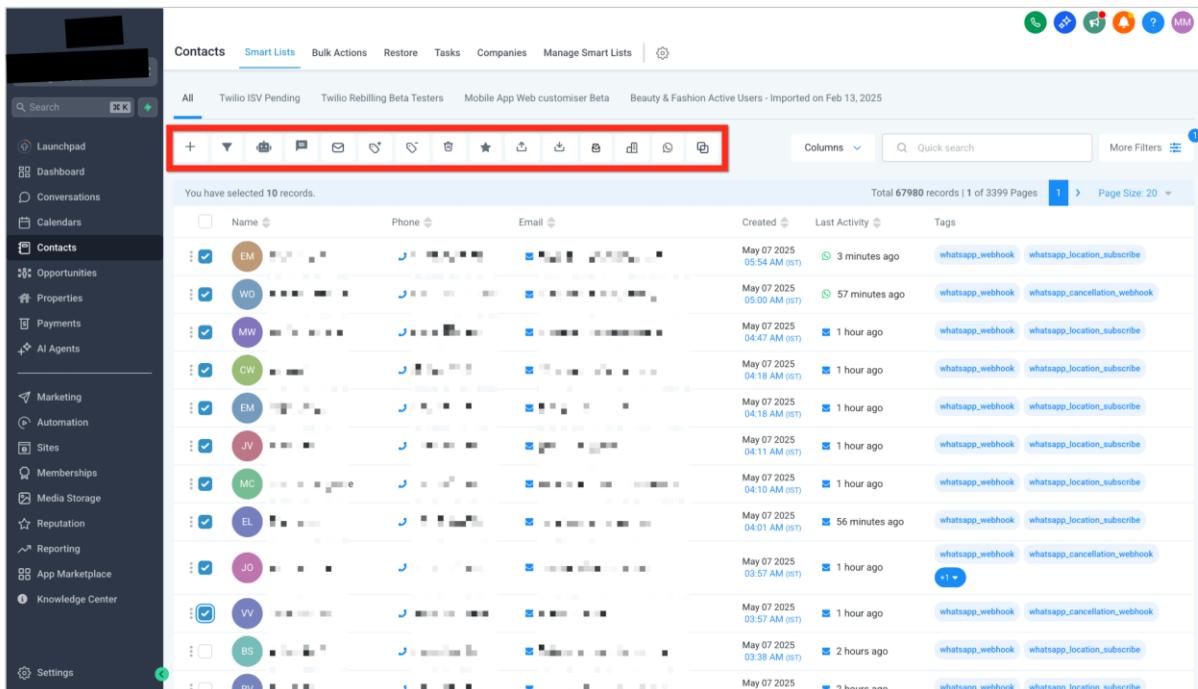
This screenshot shows the same Zoho CRM interface as above, but with a 'Filters' sidebar open on the right. The sidebar has a title 'Filters' with the sub-instruction 'Apply filters to contacts'. It features a search bar labeled 'Search Filters' with a red box around it. Below the search bar is a section titled 'Most Used' containing links for Business Name, Company Name, Email, First Name, Full Name, Last Name, Tag, and Wildcard Name. Further down is a section titled 'Contact Information' with links for Address, Assigned, and Birth Date.

3. Select checkboxes next to your chosen contacts.



The screenshot shows the 'Contacts' page in a CRM application. On the left is a dark sidebar with various navigation options like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Properties, Payments, AI Agents, Marketing, Automation, Sites, Memberships, Media Storage, Reputation, Reporting, App Marketplace, and Knowledge Center. The main area has a light background and displays a list of contacts. A red box highlights the first ten rows of the contact list, which are all selected, as indicated by the checked checkboxes in the first column. The columns include Name, Phone, Email, Created, Last Activity, and Tags. The tags listed are 'whatsapp_webhook' and 'whatsapp_location_subscribe'. At the top of the list, a message says 'You have selected 10 records.'

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



This screenshot is identical to the previous one, showing the 'Contacts' page with the same list of 10 selected records. However, a red box now highlights the entire row of bulk action buttons located at the top of the contact list. These buttons include icons for adding to automation, sending SMS, sending email, and other actions. The rest of the interface, including the sidebar and the contact list itself, remains the same.

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**.

The screenshot shows the 'Funnels' section of a software application. The left sidebar has a dark theme with various icons and sections like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Properties, Payments, AI Agents, Marketing, Automation, Sites (which is selected), Memberships, Media Storage, Reputation, Reporting, App Marketplace, and Knowledge Center. The main area has a light background with a header bar containing 'Sites', 'Funnels', 'Websites', 'Stores', 'Webinars', 'SEO', 'Analytics', 'Blogs', 'WordPress', 'Client Portal', 'Forms', 'Surveys', 'Quizzes', 'Chat Widget', 'QR Codes', and a gear icon. Below the header is a search bar with 'Search' and a red 'Create Folder' button. A prominent red box highlights the '+ New Funnel' button. The main content area is titled 'Funnels' with the sub-instruction 'Build funnels to generate leads, appointments and receive payment.' It shows a table of funnels, each with a folder icon, a name, a last updated date, the number of funnels in the folder, and a three-dot menu icon. The funnels listed are: '1 Funnel' (May 06, 2025 07:15 AM), '0 Funnels' (May 06, 2025 07:15 AM), '3 Funnels' (Feb 10, 2023 02:41 AM), '1 Funnel' (Mar 10, 2025 07:16 AM), '3 Funnels' (May 16, 2024 06:34 PM), '2 Funnels' (Mar 05, 2025 12:39 AM), '1 Funnel' (Oct 21, 2024 10:36 AM), '1 Funnel' (May 16, 2024 06:09 AM), and '6 Funnels' (Feb 04, 2025 11:40 PM).

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)

The screenshot shows a 'Create New Funnel' modal dialog over the Funnels list. The dialog has three options:

- From blank**: Design from scratch using the funnel builder. It includes a 'Funnel Name' input field with the placeholder 'Name for your awesome Fun...'. A red box highlights this input field.
- Funnel AI** (Beta): Create using AI within seconds. It features a 'Create a site under 30 seconds' button with a small icon.
- From templates**: Jump start with an awesome prebuilt Funnel. It shows a preview of 'Over 1000+ Templates' with several thumbnail images.

At the bottom right of the dialog are 'Cancel' and 'Continue' buttons, with a red box highlighting the 'Continue' button.

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.

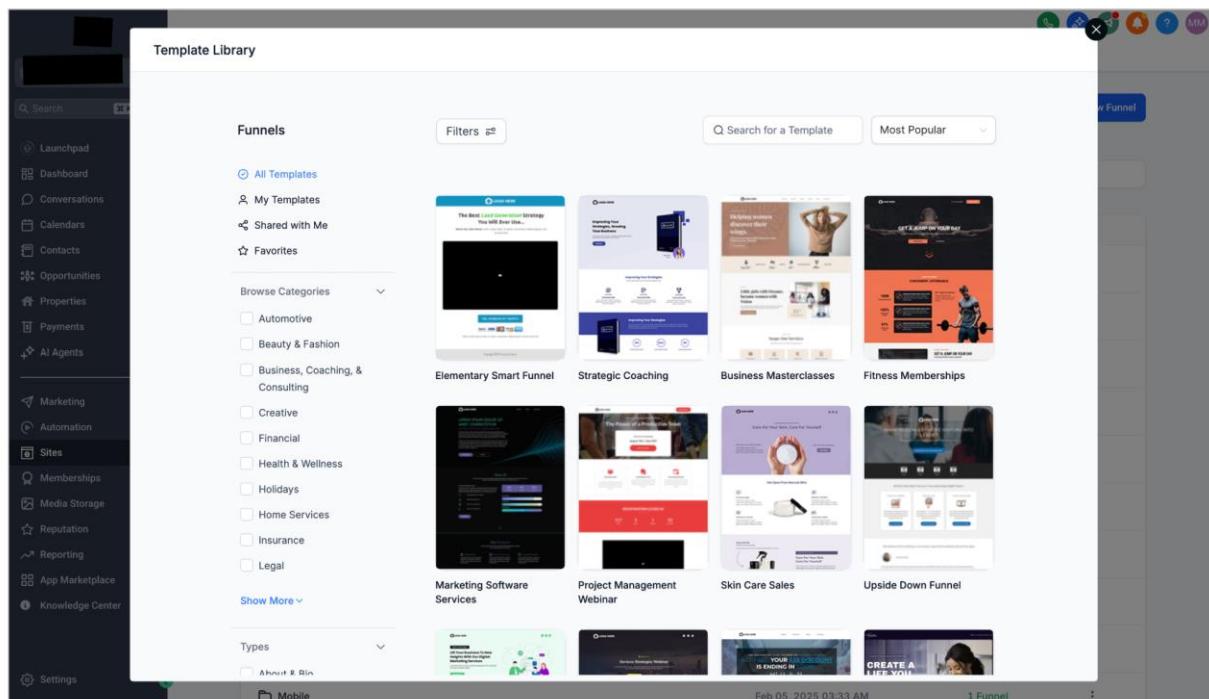
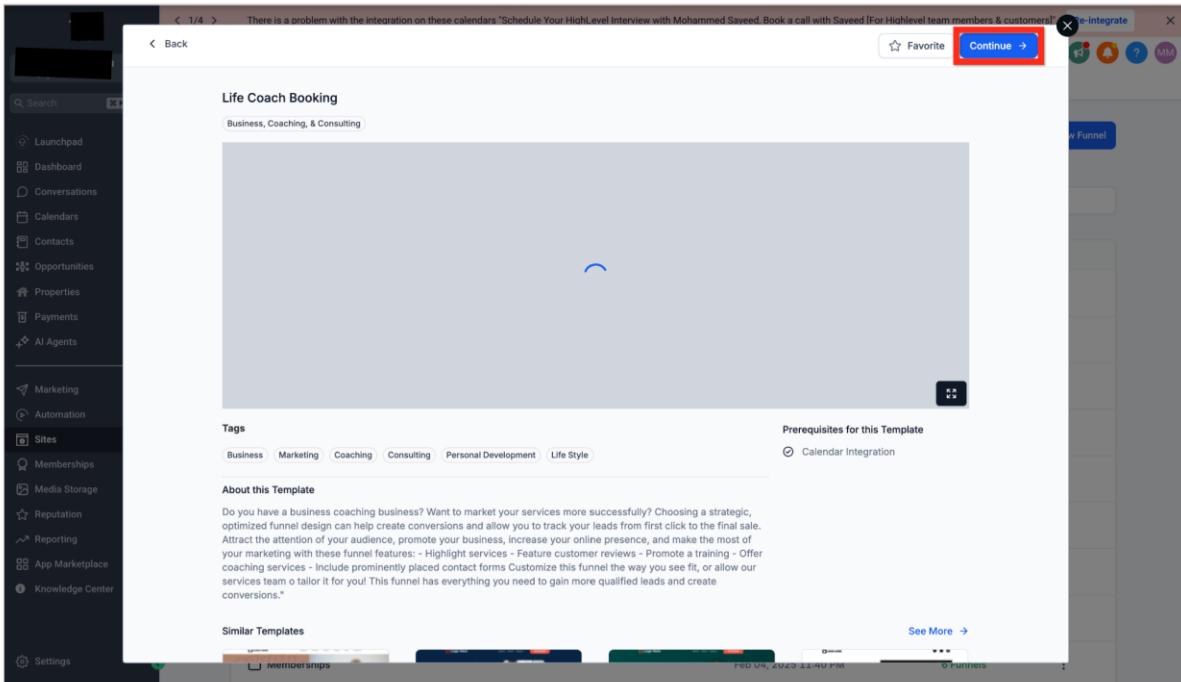


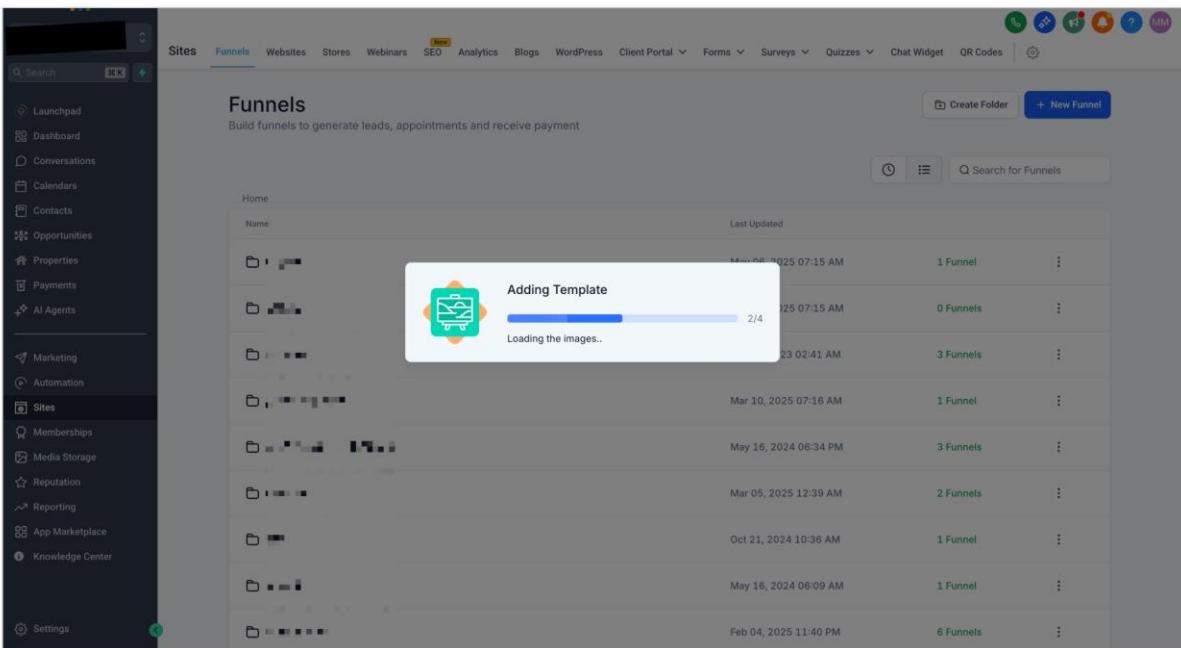
Figure 1

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.

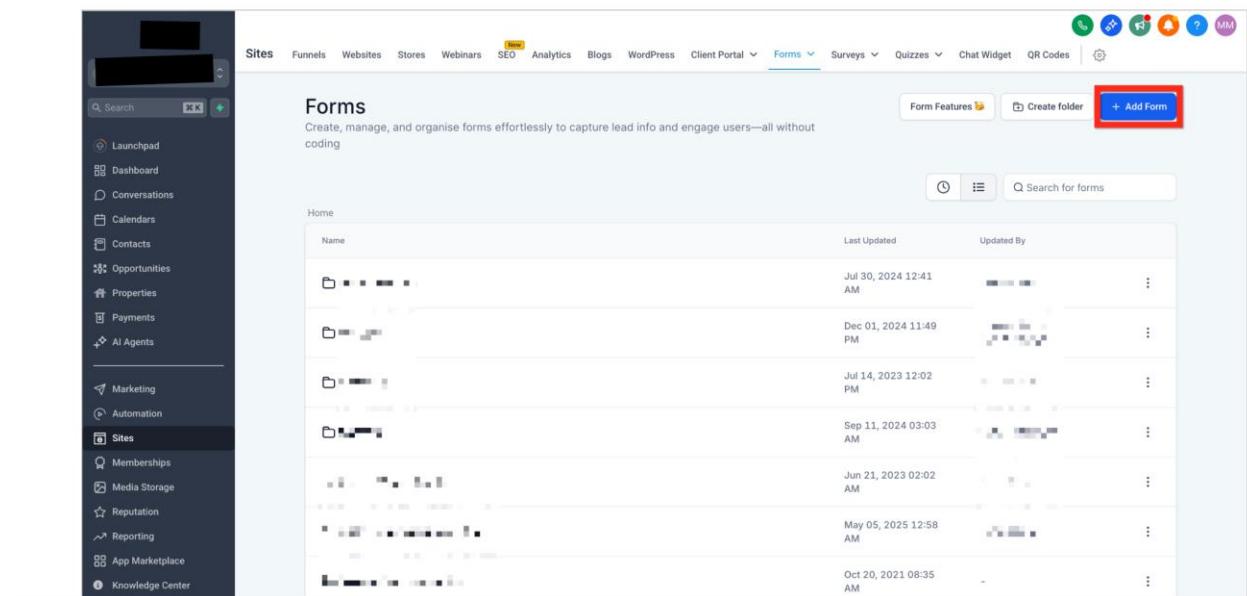
Next step: Take your funnel further—integrate a custom form to collect valuable visitor information.

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**.



The screenshot shows the 'Forms' section of a marketing automation platform. On the left is a dark sidebar with various menu items like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Properties, Payments, AI Agents, Marketing, Automation, and Sites. The 'Sites' item is currently selected. The main area has a header with 'Sites', 'Funnels', 'Websites', 'Stores', 'Webinars', 'SEO', 'Analytics', 'Blogs', 'WordPress', 'Client Portal', 'Forms', 'Surveys', 'Quizzes', 'Chat Widget', 'QR Codes', and a search bar. Below the header is a sub-header 'Forms' with the sub-instruction 'Create, manage, and organise forms effortlessly to capture lead info and engage users—all without coding'. There are buttons for 'Form Features' and 'Create folder', and a prominent red box highlights the '+ Add Form' button. A search bar and a table of existing forms are also visible.

Name	Last Updated	Updated By
...	Jul 30, 2024 12:41 AM	...
...	Dec 01, 2024 11:49 PM	...
...	Jul 14, 2023 12:02 PM	...
...	Sep 11, 2024 03:03 AM	...
...	Jun 21, 2023 02:02 AM	...
...	May 05, 2025 12:58 AM	...
...	Oct 20, 2023 08:35 AM	...

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

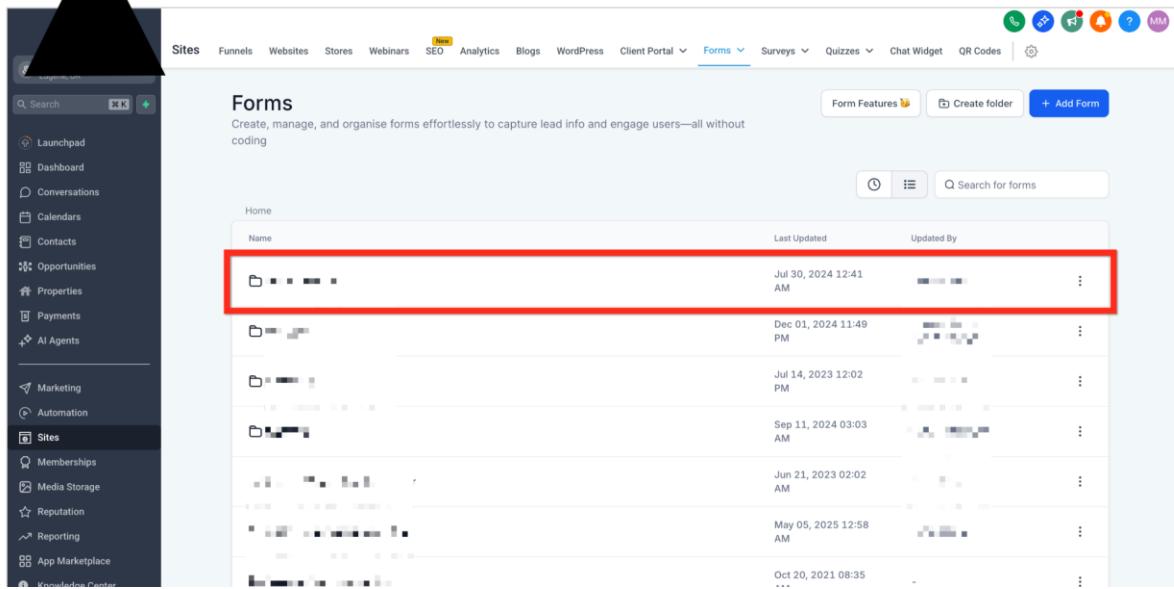
Next step: Optimize your form further with automations to follow up instantly!

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.



The screenshot shows the Kajabi Forms interface. On the left is a dark sidebar with various navigation options like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Properties, Payments, AI Agents, Marketing, Automation, and Sites. The 'Sites' option is currently selected. The main area is titled 'Forms' and contains a sub-header: 'Create, manage, and organise forms effortlessly to capture lead info and engage users—all without coding'. Below this is a search bar and a table of form entries. The first entry in the table is highlighted with a large red box. The table columns are 'Name', 'Last Updated', and 'Updated By'. The highlighted row shows a folder icon next to the name, with the last update date as 'Jul 30, 2024 12:41 AM' and the updated by user as '...'. Other rows show various form names and their last update times.

Name	Last Updated	Updated By
...	Jul 30, 2024 12:41 AM	...
...	Dec 01, 2024 11:49 PM	...
...	Jul 14, 2023 12:02 PM	...
...	Sep 11, 2024 03:03 AM	...
...	Jun 21, 2023 02:02 AM	...
...	May 05, 2025 12:58 AM	...
...	Oct 20, 2021 08:35	...

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

2. Click **Save**.

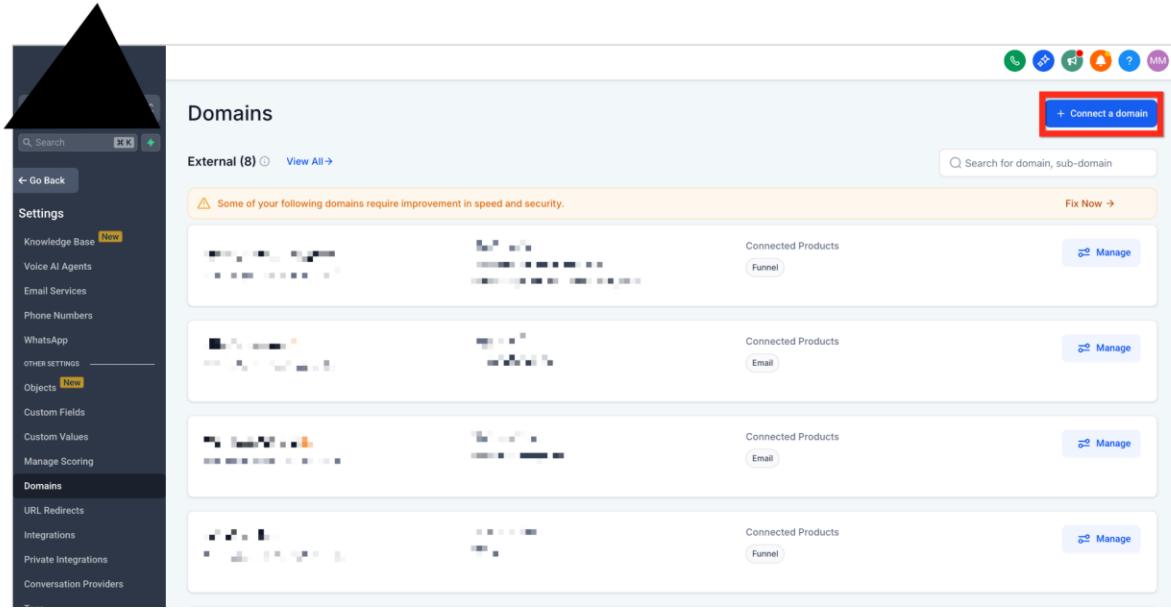
Next step: Why not check analytics to see how well your updates are performing?

Add a Domain to a Funnel

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

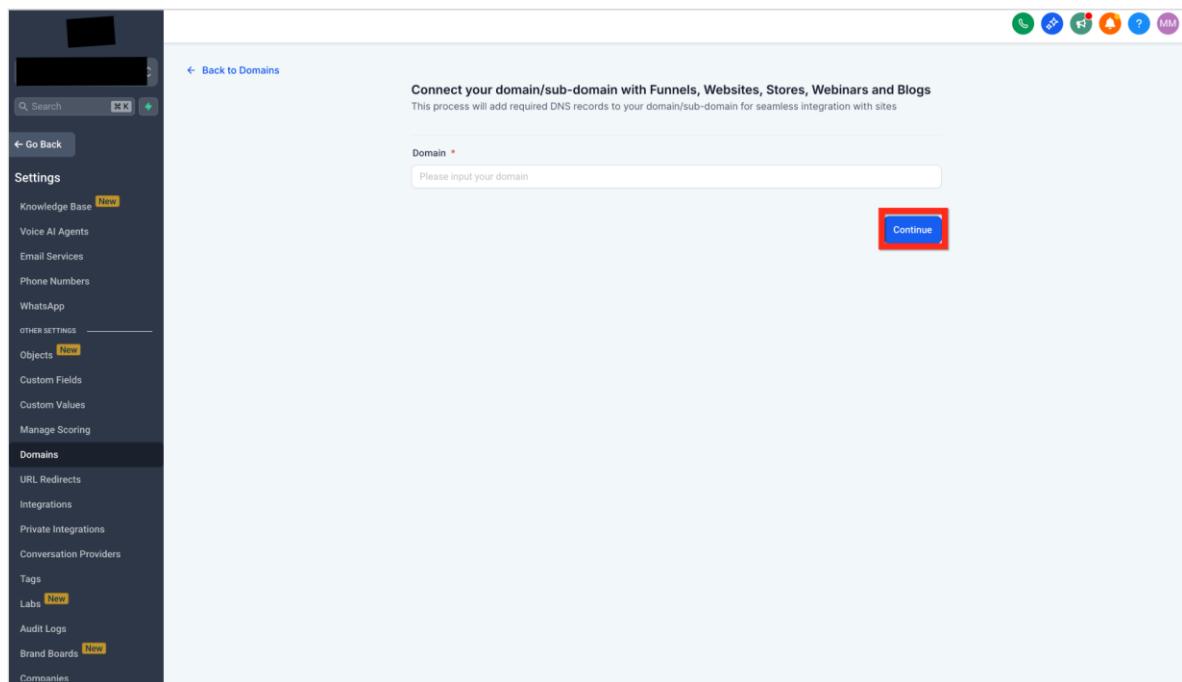
1. Go to **Settings > Domains**.

2. Click **Connect a Domain**.



The screenshot shows the 'Domains' page with a sidebar on the left containing navigation links like 'Knowledge Base', 'Voice AI Agents', 'Email Services', etc., with 'Domains' highlighted. The main area displays a list of 'External (8)' domains. Each domain entry includes a preview thumbnail, the domain name, 'Connected Products' (Funnel or Email), and a 'Manage' button. A red box highlights the '+ Connect a domain' button at the top right of the page.

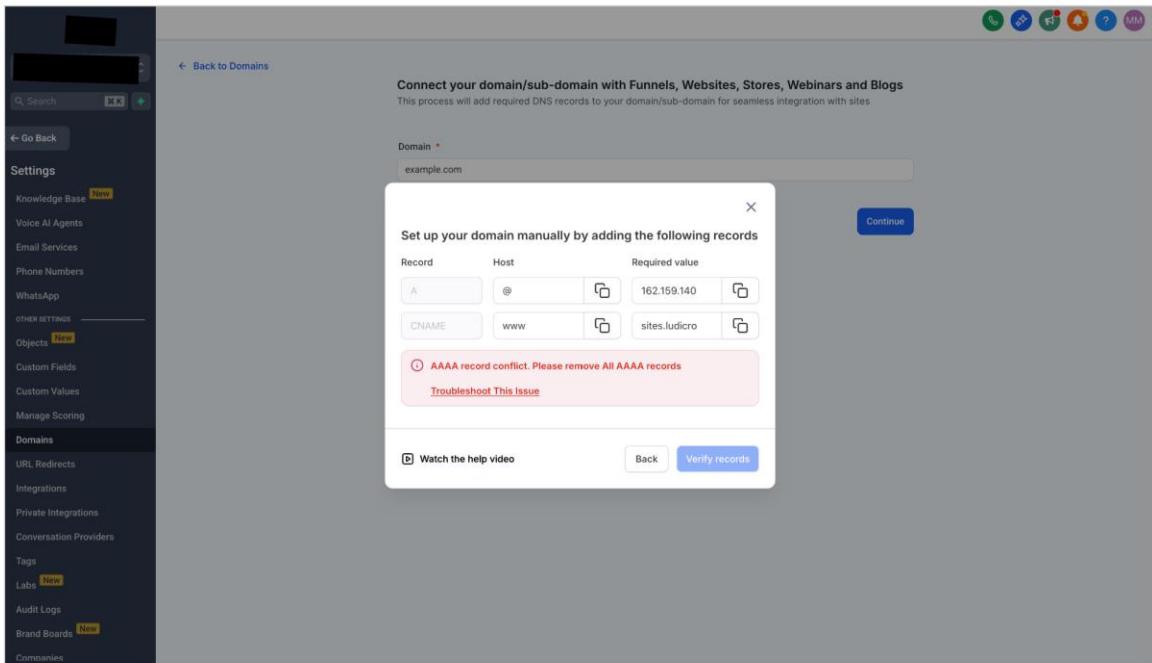
3. Enter your domain and click **Continue**.



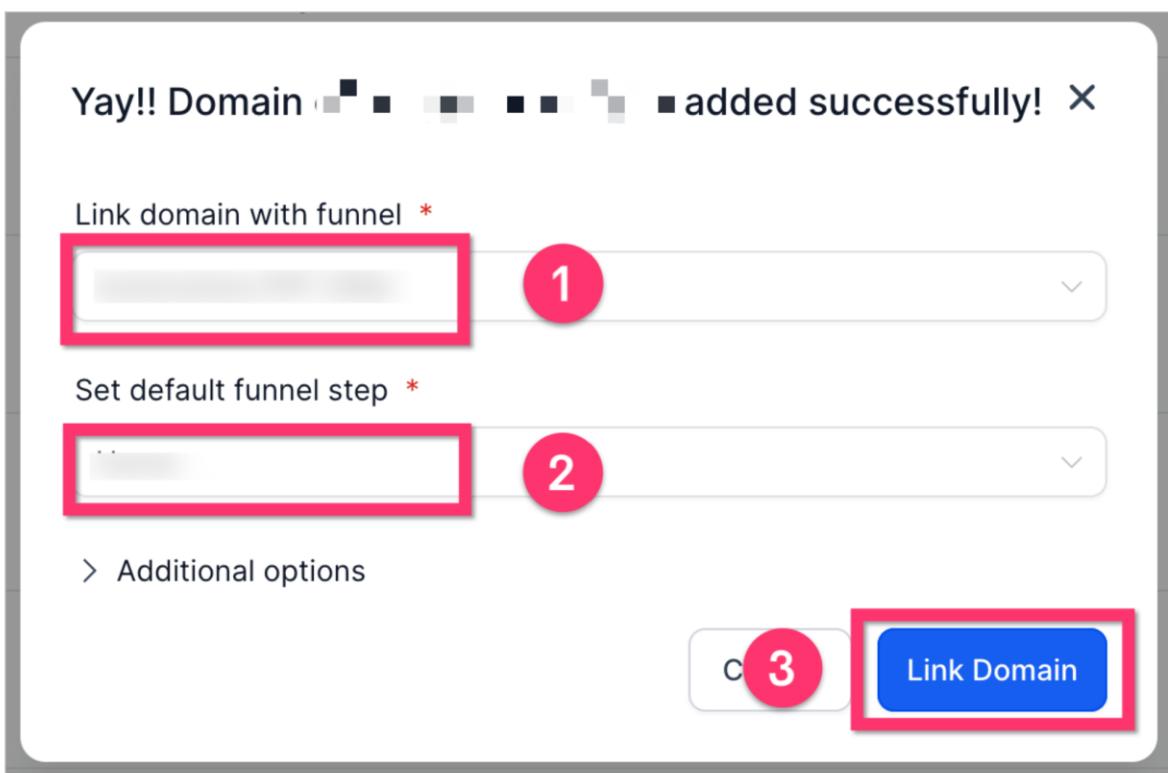
The screenshot shows the 'Connect your domain/sub-domain' page. The sidebar on the left is identical to the previous screenshot. The main content area has a heading 'Connect your domain/sub-domain with Funnels, Websites, Stores, Webinars and Blogs' and a sub-instruction 'This process will add required DNS records to your domain/sub-domain for seamless integration with sites'. It features a 'Domain' dropdown and a 'Please input your domain' input field. A red box highlights the 'Continue' button at the bottom right of the form.

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**.

The screenshot shows the LeadConnector Email System interface. On the left, there is a dark sidebar with various settings and service options like Business Profile, Billing, Staff, Opportunities & Pipelines, Automation, Calendars, Conversation AI, Knowledge Base, Voice AI Agents, Phone Numbers, WhatsApp, Objects, Custom Fields, Custom Values, and Manage Scoring. The main content area has a header "Email Services" with tabs for SMTP Service, Reply & Forward Settings, Email Analytics, Bounce Classification, and Postmaster Tools. Below this is a section titled "SMTP Service" with a sub-section "Select Default Provider". A dropdown menu is open, showing "LeadConnector Email System" as the selected provider. To the right of the dropdown is a button labeled "+ Dedicated Domain And IP" which is highlighted with a red box. Below the provider selection, there is a logo for "LeadConnector Email System" and a warning message in a box: "⚠ Not having a dedicated sending domain can lead to several issues when it comes to email communication. Here are some of the potential problems you may face: • Deliverability Problems: Messages may be caught in spam filters or rejected by recipients due to suspicions of spam or phishing, as shared or unknown domains lack a positive email reputation. • Reputation Damage: If the domain you are using for sending emails is associated Show More".

- Click **Add Domain**.

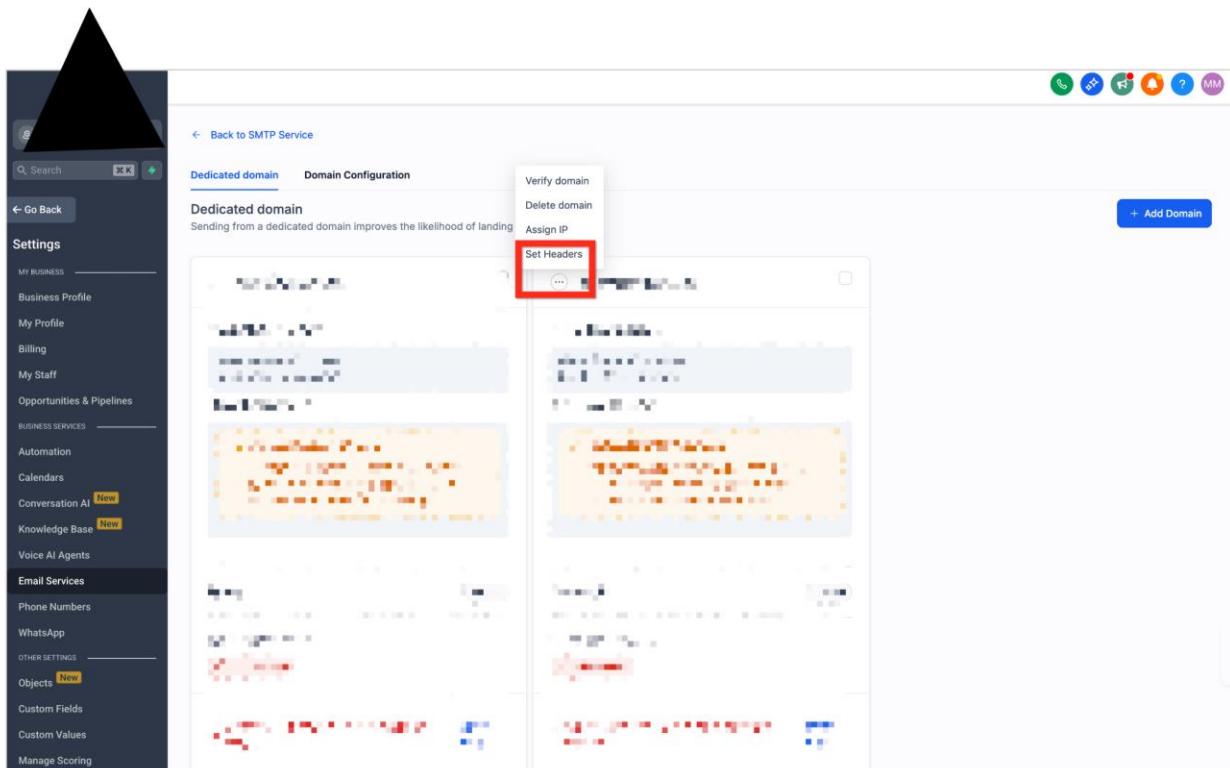
The screenshot shows the LeadConnector interface. On the left is a dark sidebar with various business-related settings like Business Profile, Billing, Staff, Opportunities & Pipelines, Automation, Calendars, Conversation AI, Knowledge Base, Voice AI Agents, Email Services, Phone Numbers, WhatsApp, Objects, Custom Fields, Custom Values, and Manage Scoring. The main area is titled 'Dedicated domain' and 'Domain Configuration'. It displays two side-by-side dashboards with various metrics and charts. In the top right corner of the main area, there is a red-bordered button labeled '+ Add Domain'.

- Enter a subdomain prefix along with your owned domain (e.g., lc.mydomain.com).

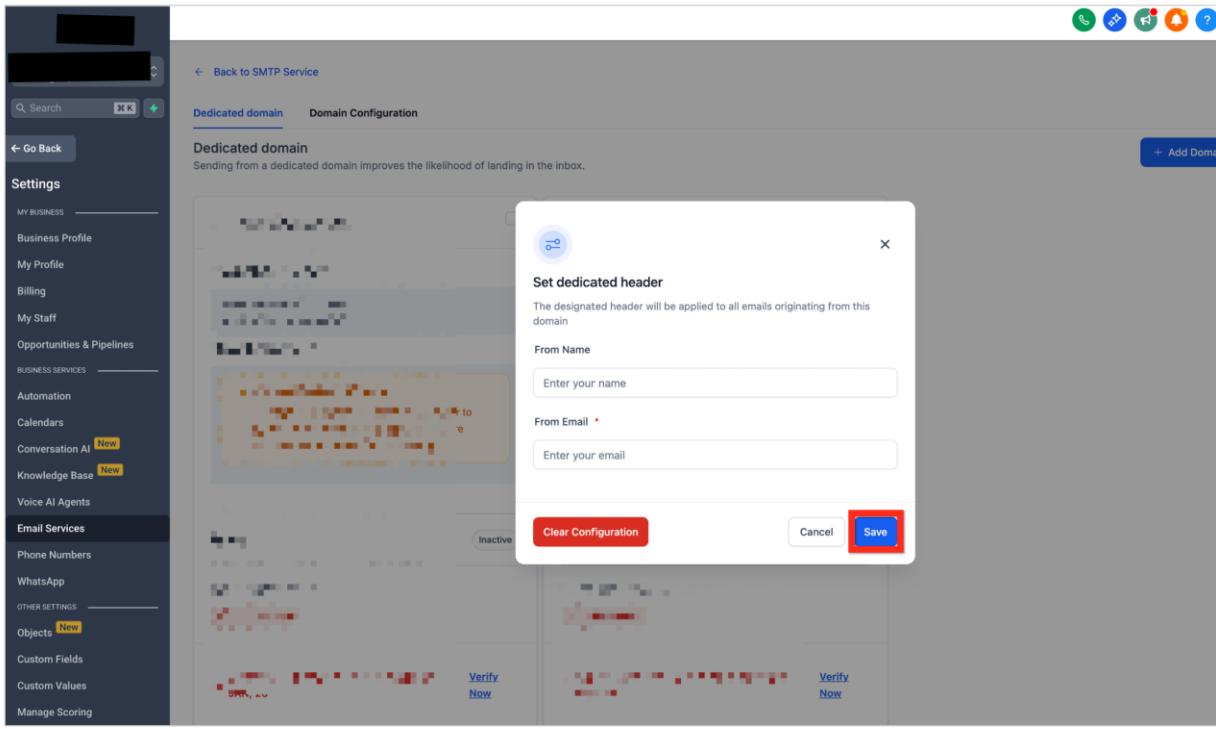
- Click **Add & Verify**.

This screenshot shows the 'Add new domain' wizard. The left sidebar is identical to the previous one. The main form has a red box around the 'Enter Domain Name' input field, which contains 'lc.mydomain.com'. Below it is a note: 'Use only lowercases in domain name.' To the right of the input field is a 'Use subdomain with Leadconnector' section with a note about using a subdomain with Mailgun. At the bottom right of the form is a red-bordered 'Add & Verify' button. To its left are 'Previous' and 'Next' buttons. On the far right, there's an 'Email warming process' section with a note about reputation and a 'Help center' link.

- 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

3



Sending Priority - From Name & Address.pdf

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**.

You are now A2P 10DLC compliant.

Manage Numbers 56 Phone Numbers

Manage your Phone Numbers and their configuration here

Phone Numbers	Number Pools	Verified Caller IDs	Search
Numbers	Friendly Name	Forwarding Number	Call Timeout
(+1) 123-456-7890	Local	123-456-7890	↓ 100s ↑ 100s
(+1) 123-456-7891	Local	123-456-7891	↓ 20s
(+1) 123-456-7892	Local	123-456-7892	↓ 60s ↑ 60s
(+1) 123-456-7893	Toll Free	123-456-7893	↓ 20s
(+1) 123-456-7894	Local	123-456-7894	↓ 60s ↑ 60s
(+1) 123-456-7895	Local	123-456-7895	↓ 30s
(+1) 123-456-7896	Local	123-456-7896	↓ 600s

+ Add Number

Add Phone Number
Used for SMS and Calls

Add Number Pool
Used for Lead Tracking

Add Verified CallerID
Used for callerID masking

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

You are now A2P 10DLC compliant.

Manage Numbers

Select Country And Choose Number

United States

Numbers	Capabilities	Type	Address Requirement	Monthly Price
(+1) 1249-488-40	Call, SMS, Image	Local	None	\$1.15
(+1) 1858-358-48	Call, SMS, Image	Local	None	\$1.15
(+1) 2124-751-27	Call, SMS, Image	Local	None	\$1.15
(+1) 844-742-12	Call, SMS, Image	Local	None	\$1.15
(+1) 646-712-80	Call, SMS, Image	Local	None	\$1.15
(+1) 506-708-71	Call, SMS, Image	Local	None	\$1.15

0 Number selected

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.

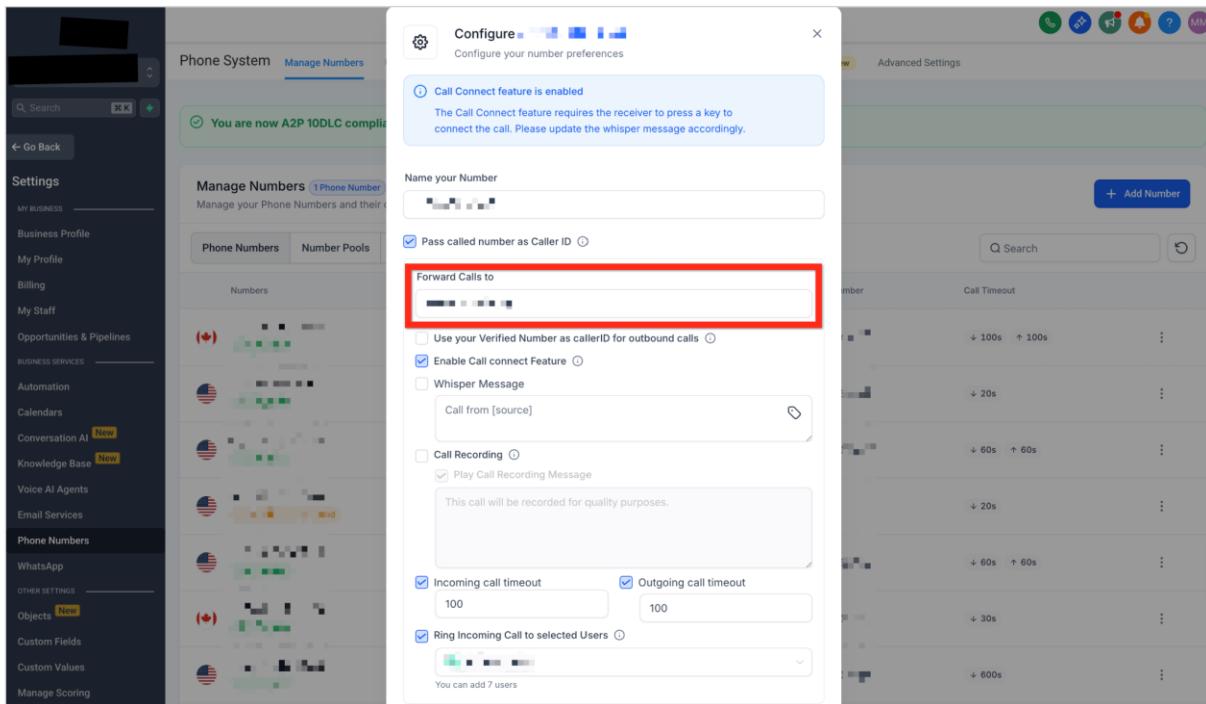
Forward Phone Calls

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**.

The screenshot shows the Zoho Phone System interface under the 'Manage Numbers' tab. On the left, there's a sidebar with various settings like Business Profile, Billing, My Staff, Opportunities & Pipelines, Automation, Calendars, and Phone Numbers. The 'Phone Numbers' section is currently selected. The main area displays a table of phone numbers with columns for 'Numbers', 'Friendly Name', 'Forwarding Number', and 'Call Timeout'. The second row from the top has a context menu open, with the 'Edit Configuration' option highlighted by a red box. Other options in the menu include 'Number Info', 'Set as Default number', 'Select A2P campaign to Link', and 'Delete Number'.

- 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).

The screenshot shows the Zoho CRM interface for managing contacts. On the left, there's a navigation bar with various modules like Launchpad, Dashboard, Conversations, Calendars, Contacts (which is selected), Opportunities, Properties, Payments, AI Agents, Marketing, Automation, Sites, Memberships, Media Storage, Reputation, Reporting, App Marketplace, and Knowledge Center. Below that is a settings icon.

The main area is titled 'Contacts' and shows a single contact record for 'process.'. The contact details include:

- General Info:** Street Address, Business Name, City, Country (United States), State, Postal Code, Website, and Time Zone.
- Communication:** Buttons for SMS, WhatsApp, and Email. The 'SMS' button is highlighted with a red box.
- Notes:** A note about WhatsApp integration and flows.
- Activity (IST):** A sidebar showing a timeline with icons for calls, messages, and other interactions. It says 'No activities yet!' and encourages engagement.

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**.

This screenshot shows the Zoho CRM interface for managing contacts. On the left is a dark sidebar with various navigation options like Launchpad, Dashboard, Conversations, Calendars, Contacts (which is selected), Opportunities, Properties, Payments, AI Agents, Marketing, Automation, Sites, Memberships, Media Storage, Reputation, Reporting, App Marketplace, Knowledge Center, and Settings. The main area is titled 'Contacts' and shows a grid of contact records. The columns include Name, Phone, Email, Created, Last Activity, and Tags. A red box highlights the 'More Filters' button in the top right corner of the contact list area.

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

This screenshot shows the same Zoho CRM interface as above, but with a 'Filters' modal window open on the right side. The modal has a title bar 'Filters' and a sub-instruction 'Apply filters to contacts'. It contains a search bar 'Search Filters' and a list of 'Most Used' filters, each with a right-pointing arrow: Business Name, Company Name, Email, First Name, Full Name, Last Name, Tag, and Wildcard Name. Below this is a section titled 'Contact Information' with filters for Address, Assigned, and Birth Date. A red box highlights the entire list of filters in the 'Most Used' section.

- Select the checkbox next to all desired contacts.

You have selected 20 records. Select all 360600 records

Name	Phone	Email	Created	Last Activity	Tags
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 01:40 AM (IST)	22 minutes ago	whatsapp_webhook whatsapp_cancellation_webhook
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 01:43 AM (IST)	27 minutes ago	whatsapp_webhook whatsapp_location_subscribe
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 01:43 AM (IST)	27 minutes ago	whatsapp_webhook whatsapp_location_subscribe
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 01:43 AM (IST)	35 minutes ago	whatsapp_webhook whatsapp_location_subscribe
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 01:43 AM (IST)	35 minutes ago	whatsapp_webhook whatsapp_location_subscribe
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 01:43 AM (IST)	54 minutes ago	whatsapp_webhook whatsapp_location_subscribe
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 01:43 AM (IST)	54 minutes ago	ad manager call us customers
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 12:51 AM (IST)	1 hour ago	whatsapp_webhook whatsapp_location_subscribe
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 12:51 AM (IST)	1 hour ago	whatsapp_webhook whatsapp_location_subscribe
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 12:51 AM (IST)	1 hour ago	whatsapp_webhook whatsapp_location_subscribe
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 12:51 AM (IST)	28 minutes ago	whatsapp_webhook whatsapp_location_subscribe
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 12:51 AM (IST)	35 minutes ago	whatsapp_webhook whatsapp_location_subscribe
[REDACTED]	[REDACTED]	[REDACTED]	May 10 2025 12:51 AM (IST)	35 minutes ago	whatsapp_webhook whatsapp_location_subscribe

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

You have selected 20 records. Select all 360600 records

Total 360600 records | 1 of 18030 Pages | Page Size: 20

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



Bulk Actions For Contacts & SmartLists.pdf

4

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 ارشادية 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؟

ما هي منصة الإطلاق لحسابات الوكالات؟

(SaaSpreneurs) لحسابات الوكالات هي أداة مصممة خصيصاً 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 مقطع فيديو تعليمية قصيرة وتوجيهات عملية. يساعد هذا النهج المستخدمين الجدد على فهم الخطوات التالية، مما يقلل من الارتكاك ويسرع من مسیرتهم نحو النجاح

فيديو منصة لحسابات الوكالات هي أداة مصممة خصيصاً لوكالات التسويق ورواد الأعمال في مجال البرمجيات كخدمة منصة الدخول إلى حساب وكالة جديدة دون معرفة الخطوات الأولى، ترشد هذه المنصة المسؤولين الجدد خلال خطوات الإعداد الأساسية باستخدام مقاطع فيديو تعليمية قصيرة وتوجيهات عملية. يساعد هذا النهج المستخدمين الجدد على فهم الخطوات التالية، مما يقلل من الارتباط ويسرع 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