# Title: Freshsales

AE High Level Demo Guide

Demo Flow:

1. 4 core modules; Leads, Contacts, Accounts, Deals.

**Leads** are your prospects, these get profiled based on your sales team's structure and assigned to the people in your sales team. Commonly leads are assigned based on industry vertical, region, product alignment etc.

Leads are added to freshsales in 6 main ways:

1. Website integration (webforms) - Freshsales code gets added to company's existing webform page - ([UTM Parameters](https://www.google.com/search?q=utm+parameters&oq=utm+parmeter&aqs=chrome.1.69i57j0l5.4339j0j1&sourceid=chrome&ie=UTF-8) can be used to recognise partly completed forms)
2. Direct, manual entry
3. Import
4. Email integration
5. Freshdesk Integration
6. Freshchat Integration

**How Sales team use Lead module:**

* Filtered view - (Brief overview)
* Saved views; can be made available to individuals, selected users, teams, all users.
* Edit collumns - (Show the menu)
* Sorting view - Prioritise leads to work more effectively.

**Bulk actions:**

* Bulk email
  + How to connect email + calendars
  + Exclude domains so internal emails don't get registered
  + Bulk email page; schedules, template, placeholders, tracking
* Assign leads to a salesperson
* Merging leads
* Updates
* Bulk SMS if relevant

**Click into a Lead**

**Lead View landing page**

* Horizontal scroll
* Lead stage
* Create custom fields,
* Delete custom fields
* Rename basic field
* Re-order basic
* Notes - becomes part of the record, time stamped
* Tasks - follow-ups, time, collaborators, reminder notifications
* Appointments, all-day = 9am-6pm in local time
* Files -
* Conversations
* Activities - Touch on Freshmarketer
* Lead score - Admin settings - lead scoring rules can be automated based on:
  + Lead property
  + Email activity
  + Application activity
  + Web Actiivity
* CRM setting intelligent Lead Scoring
  + intelligent lead scoring automatically increases based on activity

**Contact**

Conversion form lead to Contact as the segue

* Contact Overview

**Account**

* Overview, single view of company, related contacts, deals

**Deals**

* Pipeline view,
* List view,
* Filtered Views

**Tasks and Appointments**

* Explain the use of this tab; for users to monitor their task list.

**Reports**

**Automations, Workflows and Campaigns**

Template with placeholders

Teams setup