

# SaaS

## Streak

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# Getting Started

- **Streak** lets you **organize your emails, manage and prioritize your work**, and **collaborate with your team**, all within Gmail.
- Streak is a **fully embedded** workflow (**CRM**) and productivity software in Gmail, and empowers you to **manage all your work right in your inbox**.
- Streak often replaces entire CRMs, and also provides a suite of **email power tools** like email-tracking.

# Who Uses Tracking?

- **Sales**

- Receive a notification when your proposal is viewed, and you'll know exactly when to follow up. Know if your email is read and not responded to, or never reaches the recipient.

- **Support**

- Know if your support message has resolved an issue or if the contact hasn't yet read your helpful message.

- **Fundraising**

- You're trying to get legal documents in order - is your investor forgetting to follow through or do they simply need more time?

# Streak Features and Benefits

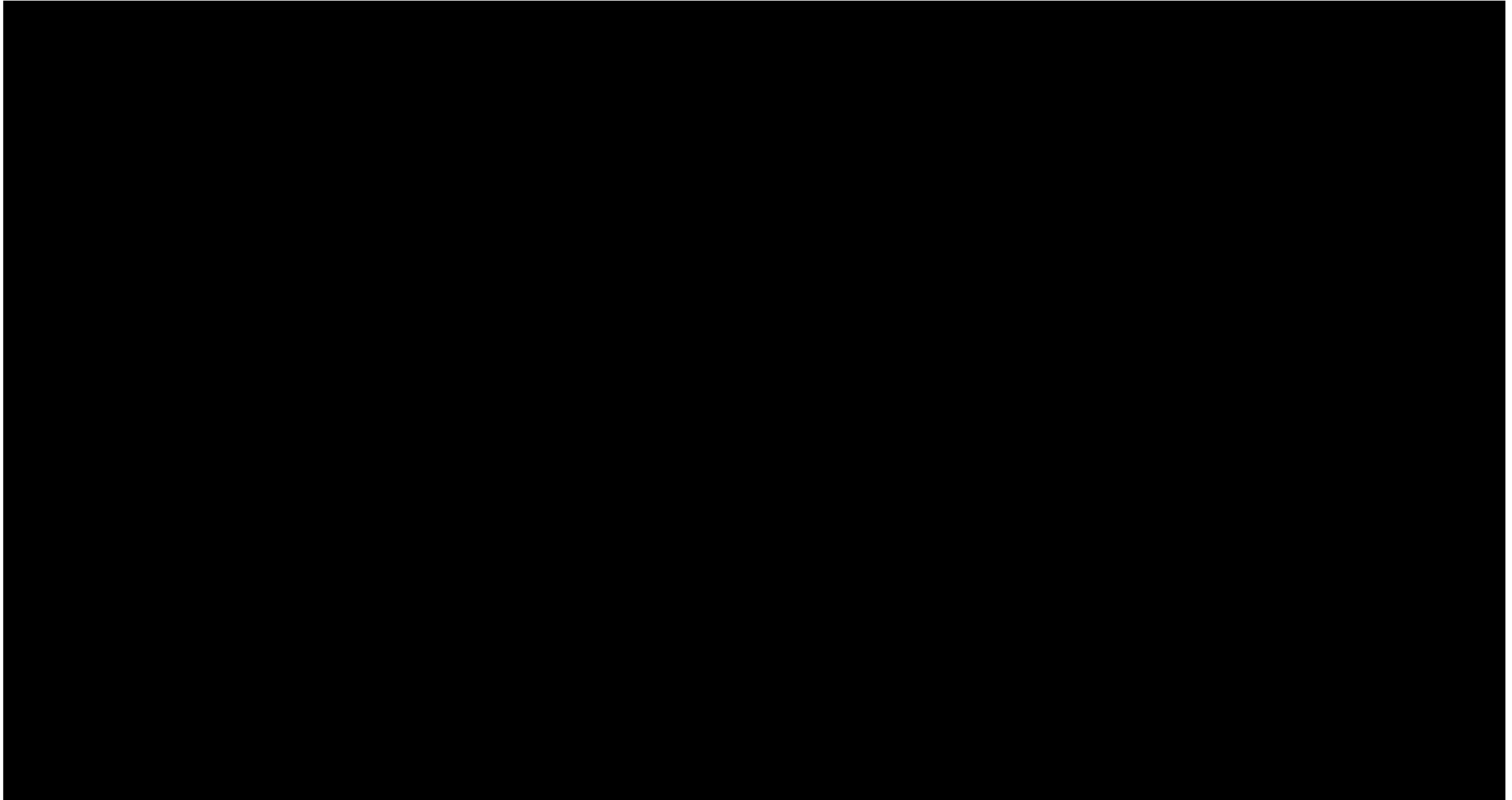
- **Integrated With Email Sidebar**
- **View Chart:** Streak creates a visual of the history of your message views so you can understand what's happening at a glance.
- **Exact View Times:** Access a full list of every time (and device type) the message has been read.
- **Mapping:** Know which city your recipient has viewed your message from.
- **Sort By Response**
- **Recently Viewed:** Sort your email not by when you sent it, but when it was viewed. Streak helps you see which messages are generating a response.
- **Awaiting Replies:** See all the messages that need follow up in one location.
- **Integrated With Search:** Use the syntax "has:tracking" to search your inbox for specific messages.

# Streak Features and Benefits

- **Viewable From Inbox**
- **Real Time Notifications** : Receive a notification every time a recipient views your message.
- **Always Accessible**: Anywhere you can view an email, also view the tracking status.
- **Snapshot View**: Mousing over the Tracking icon in the inbox will display the total number of views.
- **To Use**
- **Easy Remembers Preference**
- Turn Tracking On (or Off) via your settings so email is automatically Tracked. Streak will remember your preference so you don't have to.
- **Single Toggle in 'Compose'**
- If necessary, Tracking is a 1-click toggle in the 'compose' window.

# What is Streak?

## (Part 1 - Organize your emails)



# What are Streak's Email Power Tools?

- Streak provides a range of tools to let you work faster and smarter in Gmail.
  - **Email Tracking** - Know instantly when someone sees your message
  - **Mail Merge** - Send personalized mass emails
  - **Snippets** - Build a shared library of commonly written emails
  - **Thread Splitter** - Split conversations when topics branch
- Our email power tools are best used with our **workflow management and CRM functionalities**.

# Pipelines, Columns, Stages

- **Pipelines** are the foundational layer of Streak. They present your data in a spreadsheet view.
- **Unlimited** for private pipeline and **50 max** for shared pipeline
- Each row in a pipeline represents a **box**.
- *Boxes are flexible*: they can represent leads, opportunities, accounts, candidates etc., depending on what you're trying to manage.
- The first step to using Streak is to **add boxes!**
- **Columns** specify what data is stored in a box. You can add as many of your own **custom columns**, or **magic columns** to your pipeline.
- **Stages** define a box's progress through a pipeline.

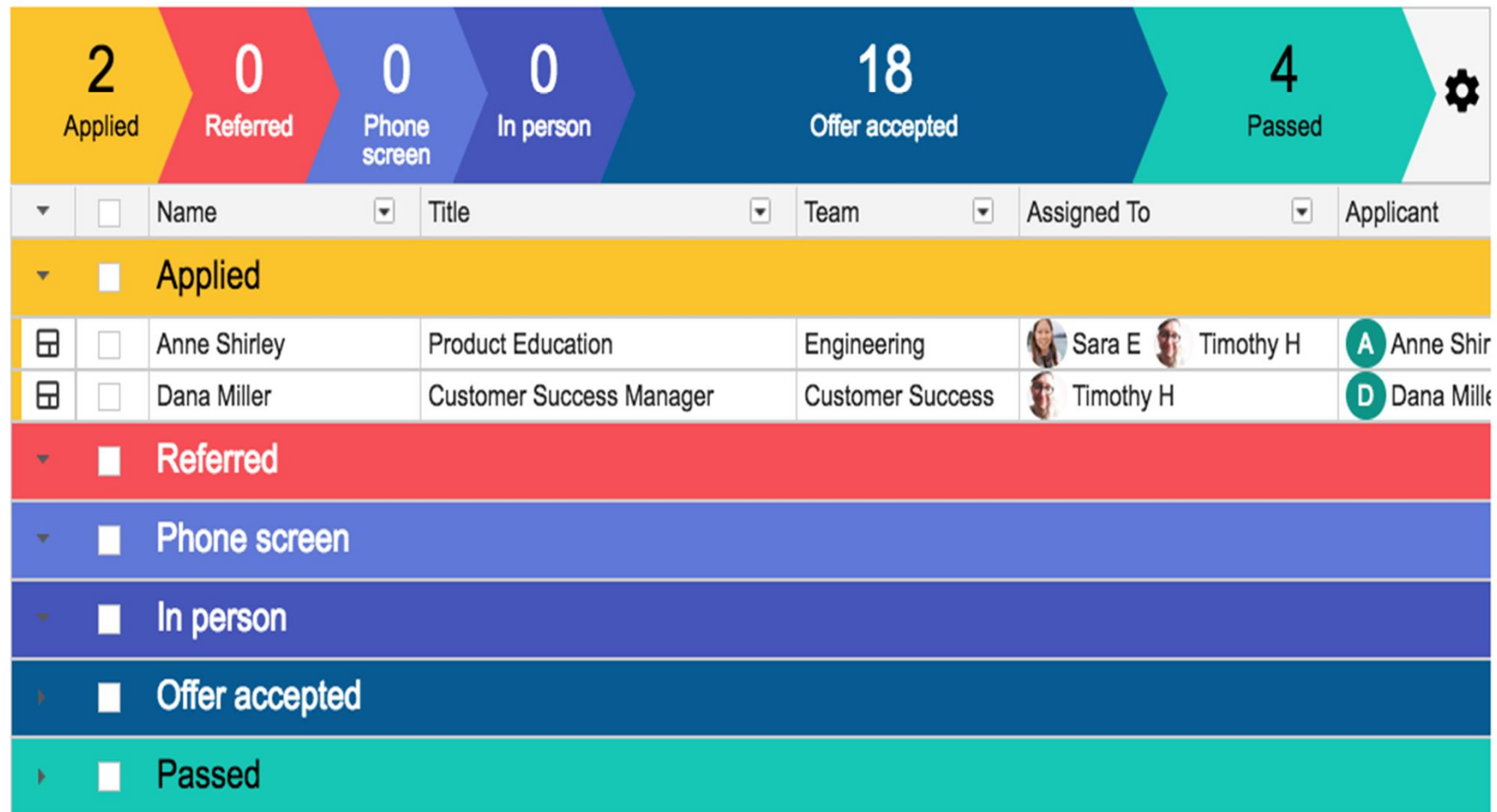


# Pipeline

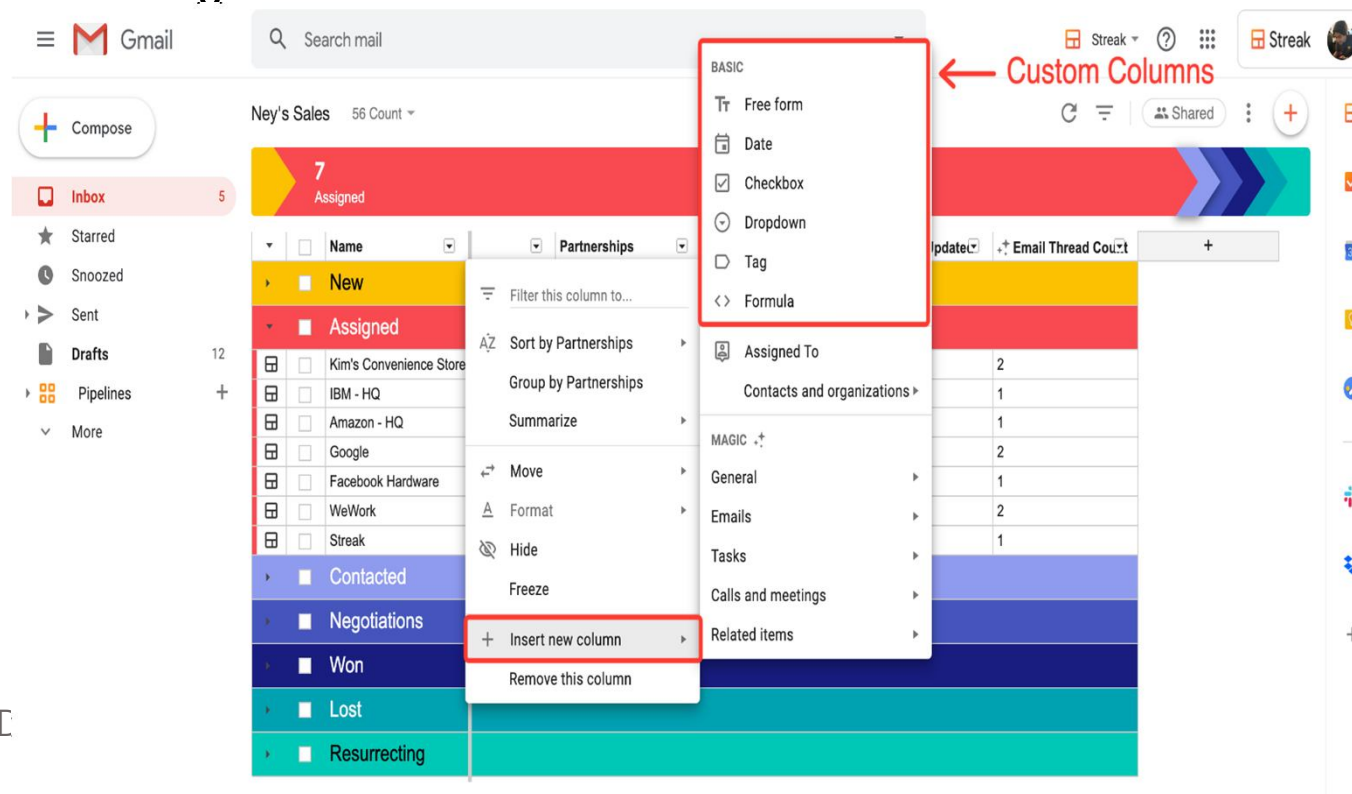
Applicants 24 Count ▾



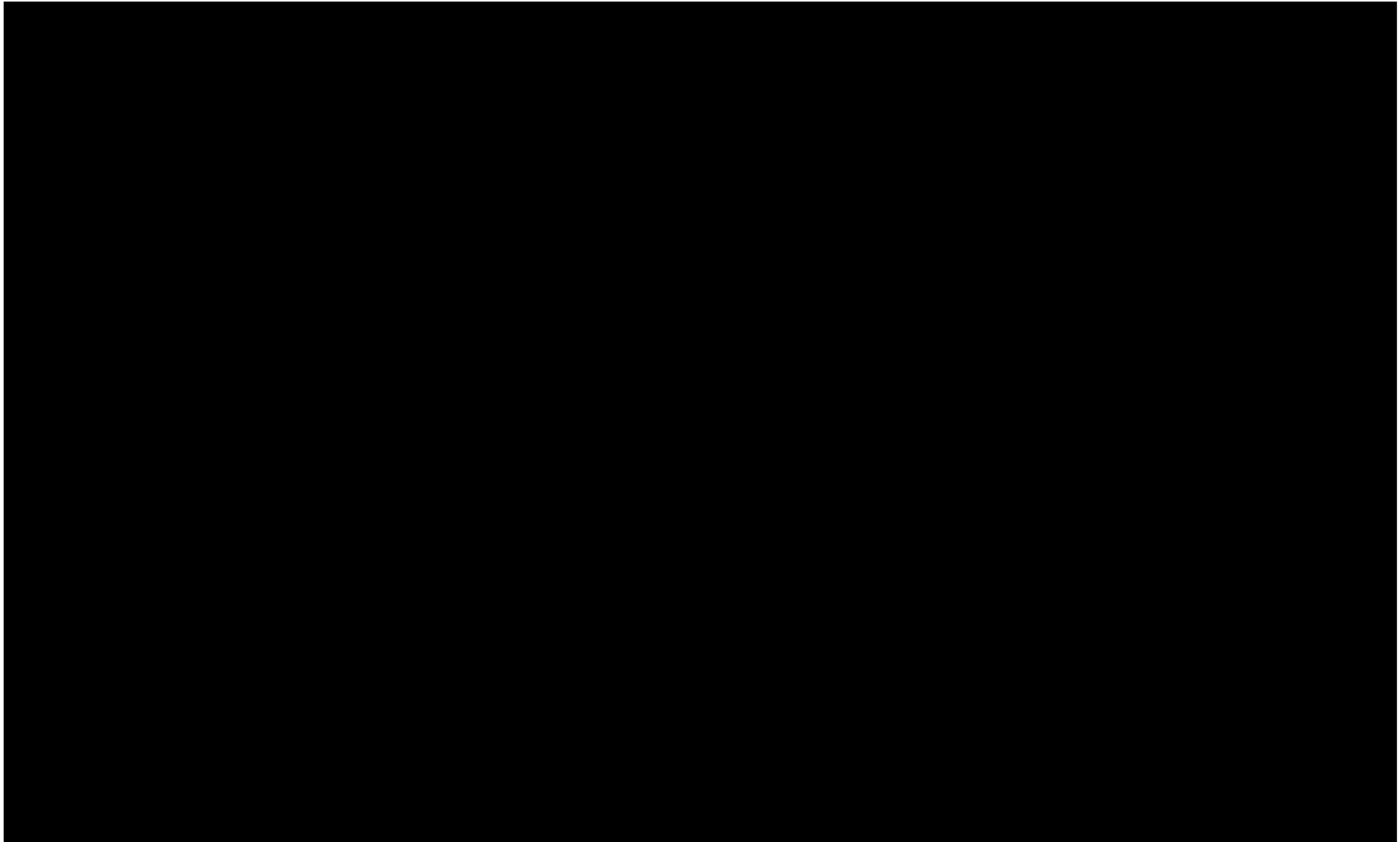
Shared



- **Custom Columns** are "basic" fields that allow you to organize and **record any kind of information** you want about what you're tracking.
- **Adding Custom Columns**
  - Create a new Column through the **+** **button** at the top right of the Pipeline, or right-clicking on any existing Column header and selecting **Insert Column** from the menu.



## What is Streak? (Part 2 - Prioritize your work)



# Magic Columns

- **Magic Columns** are fields with data that **Streak automatically records for you**. When you add a Magic Column, every Box in that Pipeline will inherit that field.
- These fields will also then show up in your sidebar
- Magic Column data is system data that cannot be edited.
- If you remove a Magic Column you will not lose the data stored in it.
- **Adding Magic Columns**
  - Create a new Column through the **+** **button** at the top right of the Pipeline, or right-clicking on any existing Column header and selecting **Insert Column** from the menu.

**Gmail Interface**

**Ney's Sales** 56 Count

**Assigned**

Name	Partnerships
New	
Assigned	
Kim's Convenience Store	
IBM - HQ	
Amazon - HQ	
Google	
Facebook Hardware	
WeWork	
Streak	
Contacted	
Negotiations	
Won	
Lost	
Resurrecting	

**Context Menu Options:**

- Filter this column to...
- Sort by Partnerships
- Group by Partnerships
- Summarize
- Move
- Format
- Hide
- Freeze
- Insert new column
- Remove this column

**Insert new column Sub-menu:**

- BASIC
  - Free form
  - Date
  - Checkbox
  - Dropdown
  - Tag
  - Formula
  - Assigned To
  - Contacts and organizations
  - MAGIC
    - General
    - Emails
    - Tasks
    - Calls and meetings
    - Related items

**Magic Columns**

# #1. Set up your pipeline

- A **pipeline** represents the **workflow** you are managing. This could be Sales, Business Development, Projects, Hiring, Recruiting, Investing, Fundraising, or *any other workflow* you might have.
- **Customize stages and columns to what you need**
- Each **stage** is a step in your workflow. Stages represent the progression from start to finish. Have as many or as few stages as you like!
- Each **column** represents the different fields of information you want to record about your boxes. (Streak automatically populates some for you!) Add and remove as many columns!



162

Lead

5

Contacted

8

Proposal

7

Shipping

2

Closed - Lost

10

Closed Won [...]

6


Nurturing

0

Lost

▾	<input type="checkbox"/>	Name ▾	Contacts and organization ▾	Country ▾	City ▾	State ▾	Deal Size ▾	Comr
		▾						
		■	Contacted					
							\$1,770.00	
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<input type="checkbox"/>	<input type="checkbox"/>	Crocus Coffee Bar	L Lani Kumar	United States	Napa	California	\$500.00	\$75.0
		▾						
		■	Proposal					
							\$2,006.25	
							Average ▾	
<input type="checkbox"/>	<input type="checkbox"/>	Lavender Coffee	A Andrew S	Mexico	Mexico City		\$2,400.00	\$360.
<input type="checkbox"/>	<input type="checkbox"/>	Rosemallows Tea	F Franklin Feeney	United States	Oakland	California	\$4,500.00	\$675.
<input type="checkbox"/>	<input type="checkbox"/>	Alyssum Tea	L Lexi-May Lu	Mexico	Napa		\$1,200.00	\$180.
<input type="checkbox"/>	<input type="checkbox"/>	Zinnia Tea	E Elliot H	Mexico	Mexico City		\$2,400.00	\$360.
<input type="checkbox"/>	<input type="checkbox"/>	Dahlia Coffee & Tea	T Tatiana Cortez	United States	Houston	Texas	\$250.00	\$37.5
<input type="checkbox"/>	<input type="checkbox"/>	Bellflower Tea	D Drew Spitzer	United States	Oakland	California	\$500.00	\$75.0
<input type="checkbox"/>	<input type="checkbox"/>	Buttercup Coffee - 2020	J Justine Delgadillo H	United States	San Francisco	California	\$2,400.00	\$360.
<input type="checkbox"/>	<input type="checkbox"/>	Let's Connect	D Drew Spitzer				\$2,400.00	\$360.
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		■	Shipping					
							\$1,950.00	
							Average ▾	
<input type="checkbox"/>	<input type="checkbox"/>	Rose Coffee & Tea	F Franklin Feeney L L				\$500.00	\$75.0
<input type="checkbox"/>	<input type="checkbox"/>	Jasmine Bar	L Linzi Howarth				\$2,400.00	\$360.
<input type="checkbox"/>	<input type="checkbox"/>	Anemone Tea	H Hoang Nguyen				\$2,400.00	\$360.
<input type="checkbox"/>	<input type="checkbox"/>	Daffodil Coffee Emporium	A Adi R				\$4,500.00	\$675.

# Step 1: Creating Your Pipeline in Streak

- Go to stream.com and add streak extension in Chrome/Safari browser (Latest)
- Click on  **Pipelines + New** Symbol in left panel
  - Choose Sales
  - Rename Your Sales Pipeline and choose Visibility
  - Coloured Ribbons- Stages->
    - Add New Stage + , Delete a Stage or Rename a stages,
    - Drag and Drop stages and rearrange, Change Color Schemes
  - Add emails to the stages
  - Add a column to track
  - Create a new column from drop down column and add free from
  - Select checkbox for task completion and add tags
- Add Magic Column from drop down
  - Fetch key pieces of data (Date of last email), (Date in Stages)



## #2. Organize your emails, starting with boxes

- **Add boxes**

- Quick Add is one of several ways to add boxes to your pipeline.
- Each box is a row in your pipeline, and represents what you're trying to track in your pipeline. In many cases these are companies or individuals.

# Adding Boxes

The screenshot shows a Gmail interface with a hiring pipeline and a sidepanel for adding contacts and companies.

**Gmail Interface:**

- Search bar: `is:starred`
- Left sidebar: Compose, Inbox, Starred, Snoozed, Sent, Drafts (13), Pipelines (+), More.
- Top bar: Hiring 0 Count, Private, Streak, and a user profile.
- Hiring Pipeline: 0 Resume, 0 Phone Screen, 0 Interview, 0 Internal Deci..., 0 Offer Negotia..., 0 Hired, 0 Pas.
- Illustration: A person meditating with a laptop, surrounded by floating documents and a smartphone.

**Sidepanel:**

- STREAK Quick add
- Find companies or contacts
- Contacts: angela@roadsidedentalmarketin..., Alvin Phun • alvin.p@roserocket..., Daisy Parker • ms.daisyparker89..., Ryan Sandoval • ryansandoval@..., Katelyn Larson • katelyn@skylin..., Jo Bradley • info@galleriafresco..., Manuel Guadarrama • mguadarr..., Paulo Souza • sopaulo@google..., Grace Cohen • grace@silvonhom..., View all (+490)
- Companies: Roadside Dental Marketing • roa..., Rose Rocket • roserocket.com, Google • google.com, Skyline Music • skylineonline.com, galleriafresco.com, Smart IT • smartitcompany.es, Silvon • silvonhome.com, barbaramontesanto.com

**Text:**

Get started by quick adding from the sidepanel

click on any company or contact

[Import](#) [Intro to pipelines](#)

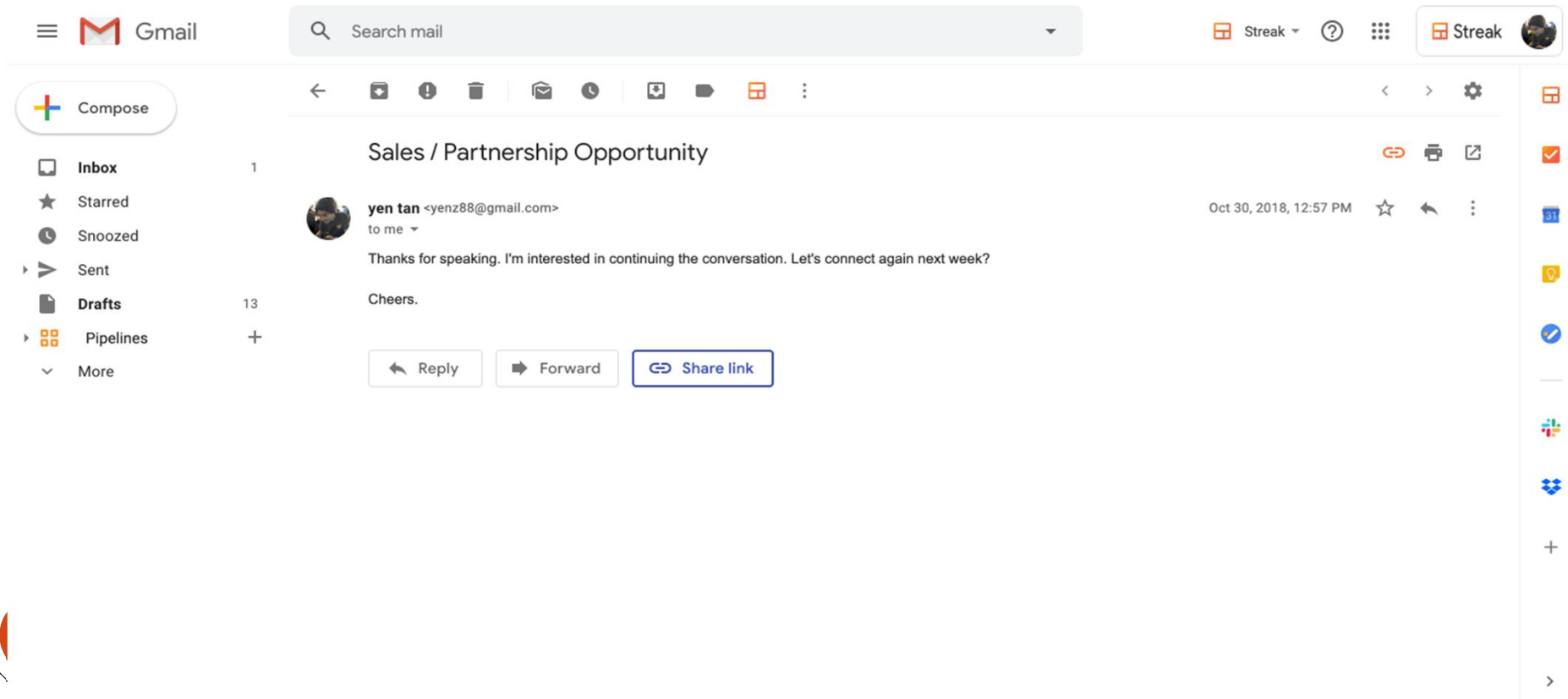
# What is a box?

- A box is an item that you move through your pipeline - it could be a sales lead, a candidate's job application, a support ticket, an investor, or anything else you'd like to track.
- Each row in a pipeline opens into a detailed box **view**, where you can **track emails, files, contacts, details, and communication** related to your box.

## Step 2: Creating & Managing Boxes in Streak

- Add a new Stage -> Box element under Stages
  - Add contact details and more information
  - Add information for Data Enrichment
- Add the boxes from mail and inside stages
- Move the Contacts emails either single or mass move

- **Organize your emails through the sidebar**
- **Add your emails to existing boxes, OR create new boxes for them**
- After an email is added to a Box (new or existing), you can now access Box details through the sidebar. You'll also be able to see this email in that Box.



## #3. Enrich and collaborate

- Within **each of your boxes**, you could:
  - Add and view emails (including any email your team adds!)
  - Add comments and meeting notes (shared with your entire team)
  - Collaborate and tag team members (we'll notify them when you @mention them)
  - Add contacts (we'll automatically enrich them with publicly available data)
  - Assign tasks (we'll notify them when assigned)
  - Upload files

 Follow







Assigned To

Yen T x

2mos ago 

[Reply](#)

Contacts Orgs

ADD EMAIL CONTACTS

Tuna something

## Step 3: Utilizing the Box View

- Single Contact View in detail tracking
  - Box View
- Send an intimation to the team mates
- Create and Assign a task to any member
- Streak Upcoming



# What else should I do?

- **If you have completed steps #1 - 3** ,! You're set up for success. Streak has **a lot more** to offer:
- **Email power tools**. Email tracking, mail merge, snippets, and send-later.
- **magic columns**. We automatically capture lots of data (e.g. date of last email, number of emails, days in stage etc.) for you to organize and prioritize your pipeline.
- **Saved views**. Filter, sort and group your pipeline to tell you which boxes need attention, what to work on next, and even to analyze your data!
- **Add your team**. Start collaborating with others: share anything you want: your emails, contacts, Boxes, and Pipelines.
- **Tasks**. Create and assign flexible tasks to yourself or your team.
- **Mobile**. If you're someone on-the-go, download our **iOS and Android apps!**

# Reference

1. <https://support.streak.com/en/articles/2624039-getting-started>
2. [https://docs.google.com/document/d/1tldg0PcZavq2OuMZ1hRI4s-jlVtm3u1FsTFC4pne\\_pE/edit](https://docs.google.com/document/d/1tldg0PcZavq2OuMZ1hRI4s-jlVtm3u1FsTFC4pne_pE/edit)
3. <https://www.youtube.com/watch?v=N2rdXnxMXxU>
4. <https://www.youtube.com/watch?v=EKvJhQNgpXk>
5. <https://youtu.be/qC39fAY2amo>
6. **Step 1: Creating Your Pipeline in Streak**
  - [https://www.youtube.com/watch?v=7INX\\_KSuzMg](https://www.youtube.com/watch?v=7INX_KSuzMg)
7. **Step 2: Creating & Managing Boxes in Streak**
  - <https://www.youtube.com/watch?v=QTTAB8R2QpA>
    - Create a new lead from your pipeline
    - Create a new lead from an email thread
    - Create a new lead through a google sheet import
8. **Step 3: Utilizing the Box View**
  - <https://www.youtube.com/watch?v=vCG4ACZBtN0>