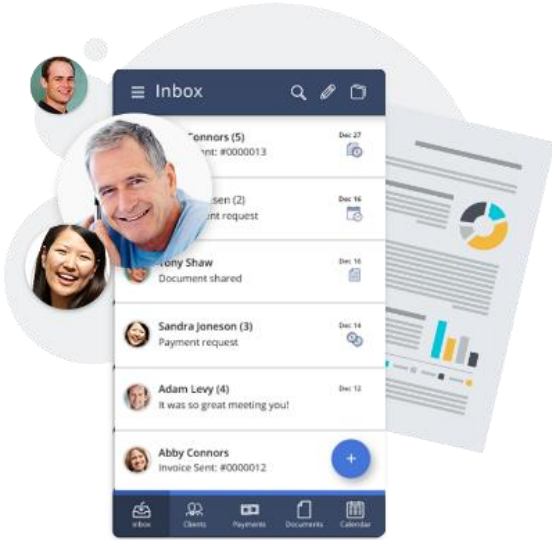


# CRM Client Handbook



## **Table of content**

### Working with the Inbox

- View & Respond to Clients Requests
- Set Follow-up Reminder
- View & Edit Client Card

### View & Manage Clients

- Add a New Client
- Import Clients
- Search Clients
- Send a Message
- Interact with multiple clients

### Calendar

- Schedule a New Appointment with a Client
- View and Manage Appointments

### Payments

- Create a New Estimate/Invoice
- Manage Payments
- Record a Payment

### Documents

- Share a Document
- Request a Document

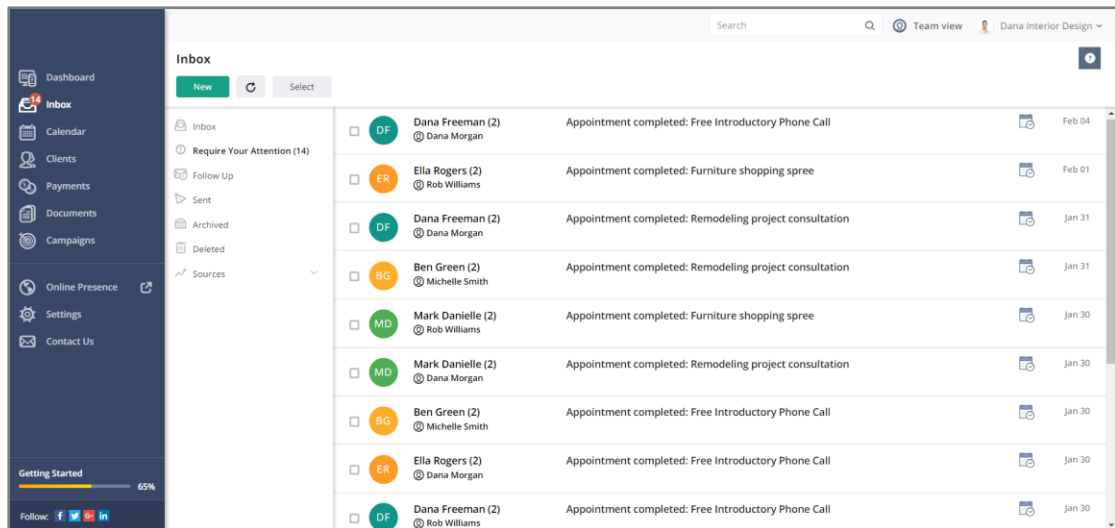
### Campaign

- Create a New Campaign
- Send a Campaign
- View stats

## Inbox:

The Inbox is very simple and intuitive, similar to what you already know from your email inbox. This is where you will find all your communication with your clients.

Whenever clients contact you, schedule or pay, their request will be listed in the Inbox.



**New** - From the Inbox, you can also add new clients, send messages, schedule appointments, create invoice, record payment and share or invite to share a document.

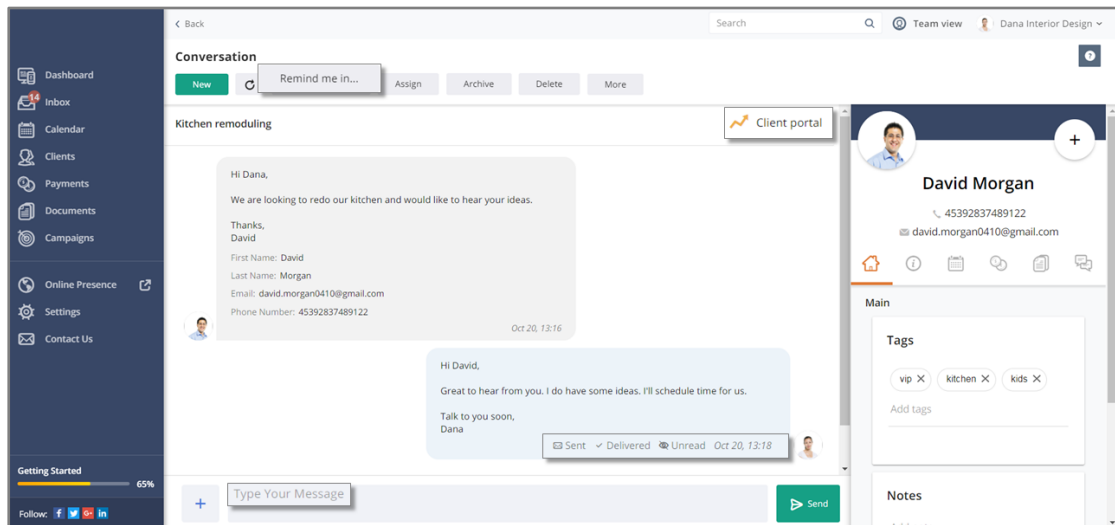
**Invite Via Email** - Send your clients an invitation to visit your LiveSite client portal and take action like schedule a service, pay online share a document and more.

[Back to top](#)

## View & Respond to Clients Requests:

To view the content of any request in your Inbox, simply click on its title.

On the conversation page, you can see the correspondence as a chat like layout.

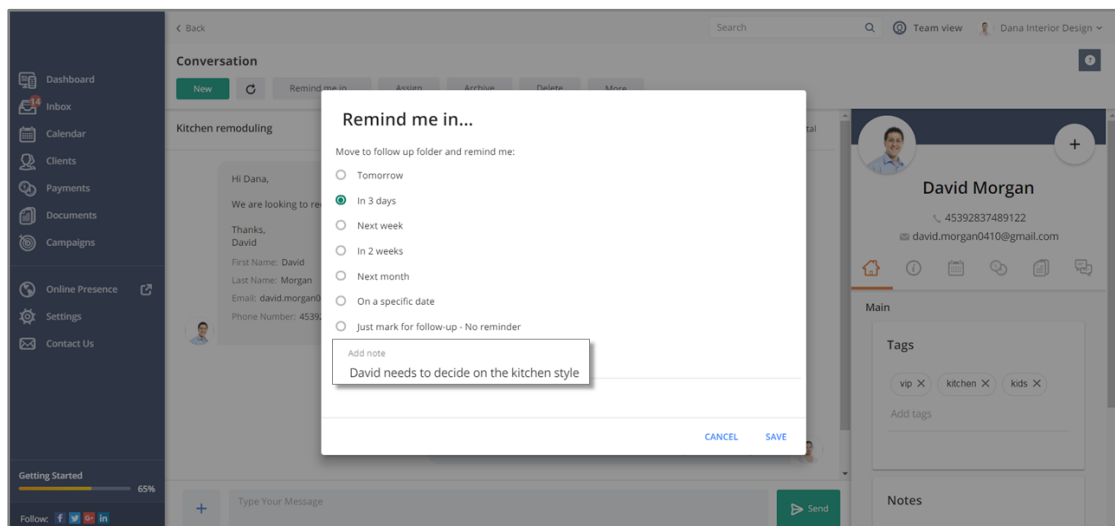


**Respond** - To reply to the client, click on the **"Type Your Message"** box at the bottom of the page.

**Send/Receipt** – When you send a message to a client, you can see that your email was delivered and when it was read.

**Source** – See the URL or page from which the request was submitted.

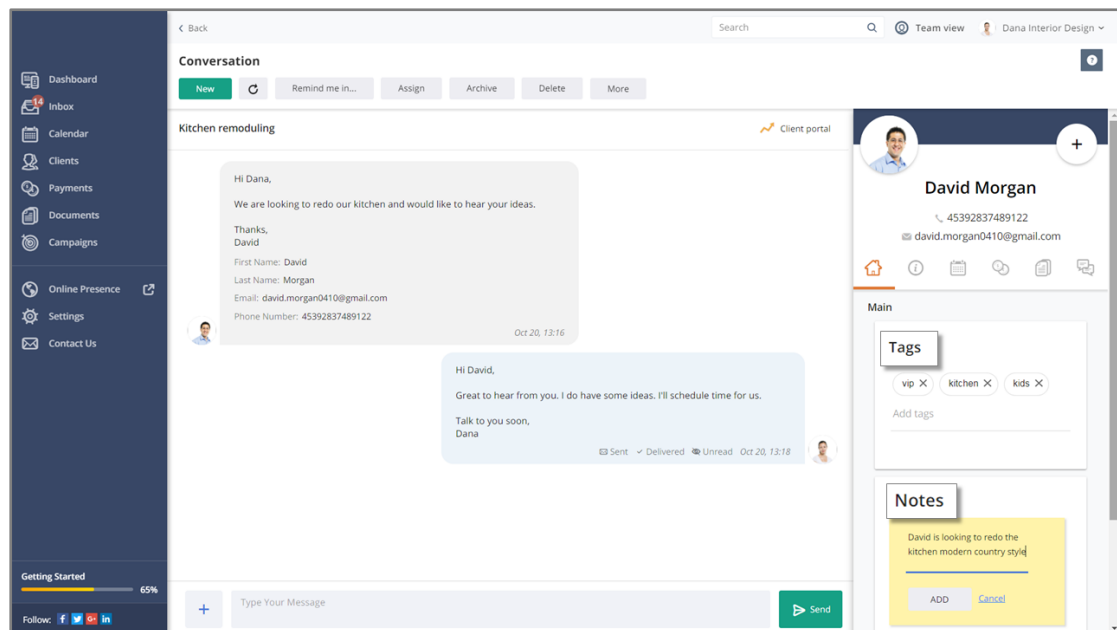
**Remind me in** – Set yourself a reminder to follow up on a specific client interaction. You can set a specific date for to follow up and include a note for a quick recap. When the time comes, the system will notify you by email and will push the conversation to the top of the list in your Inbox.



[Back to top](#)

## View Contact Info:

Within the conversation page, on the right-side pane, you'll find the **client card**. The client card will provide a quick overview about each client information and their activity on your LiveSite.



**Main** (Home icon) – Add and view **Tags** that will help you to search and filter clients based on specific key words.

Add **Notes** that will help you to quickly recap about the status and latest conversation with the client.

**Info** ("i" icon) – Client info holds all the information you collect from clients when they contact you or that you would like to document.

Usually includes basic contact information and you can add any additional information you need to provide your clients with the best service.

**Booking** (Calendar icon) – Lists all the appointments with the client. Click on any item to view it.

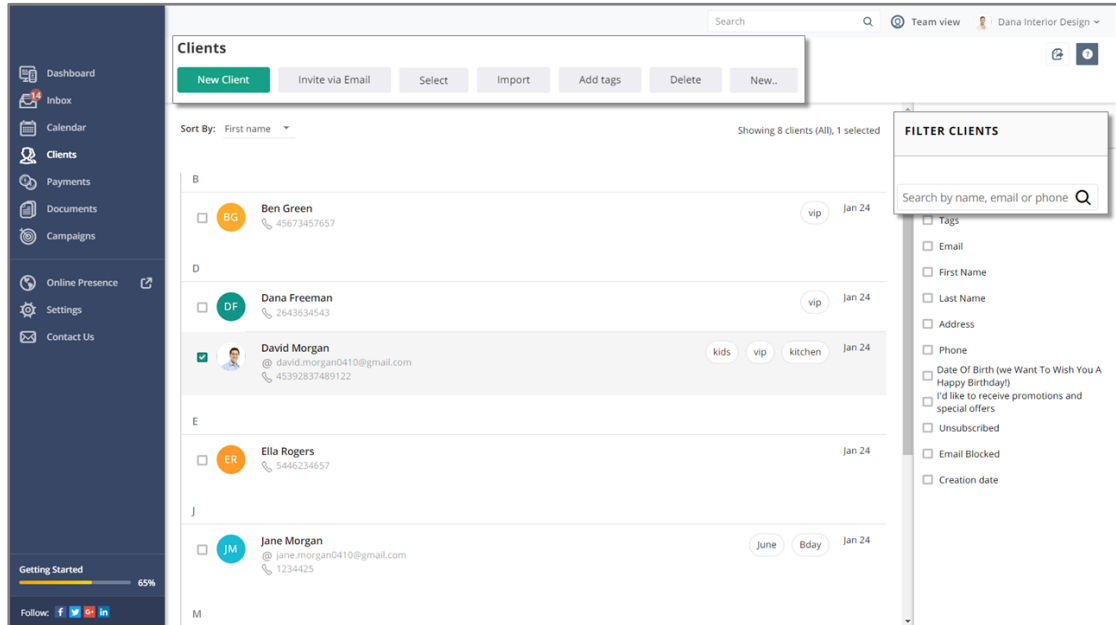
**Payments** (Coins icon) – Lists all paid and open payments for the client. Click on any item to view it.

**Documents** (File icon) – Lists all documents you shared with or received by the client. Click on any item to view it.

**Conversations** (Chat icon) – Lists all the interactions with the clients. Click on any item to view it.

## Clients:

The Clients page lists all the clients that contacted you through your LiveSite. You can add more clients manually or by importing from an external source. Here you can also view and manage clients, their information or start new interactions with one or more clients at a time.

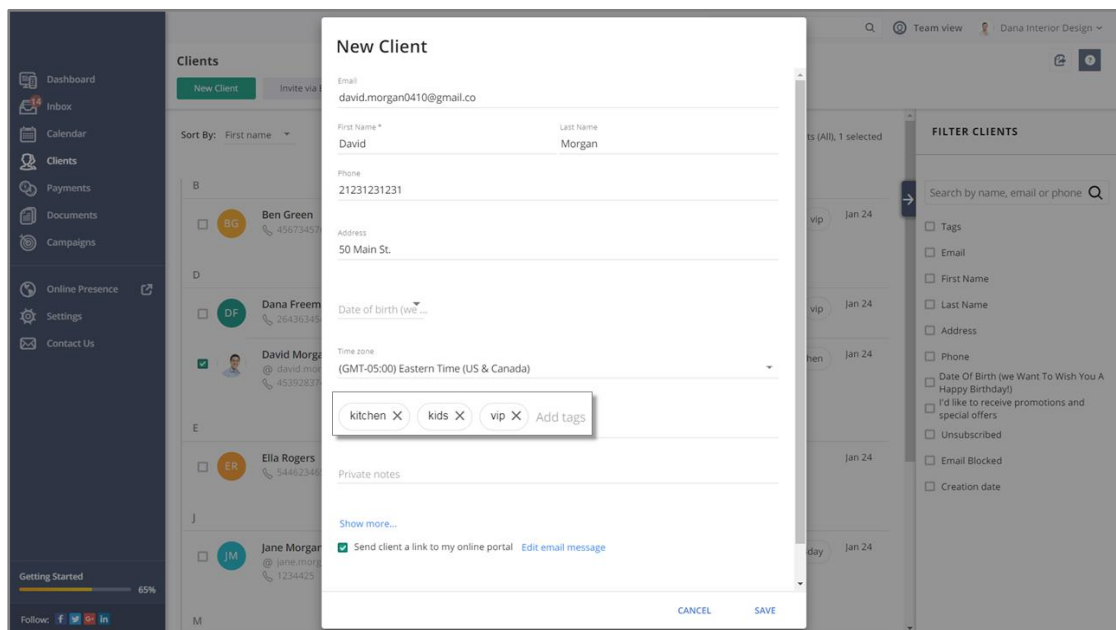


### Add a New Client:

Click on the **Clients** or **Inbox** menu on the left navigation pane.

Then click on **New>Client**.

Type in the client's information and click **Save**. You'll be directed to the client card page for the specific client where you can take further actions.



[Back to top](#)

## Import Clients:

Click on the **Clients** menu on the left navigation pane.

Then click on **Import / Export** button and select **Import**.

You can choose to import clients directly from your Google Contacts account or from a CSV/Excel file. Once you make your selection, follow the instructions on the page.

## Search Clients:

To find a specific client on your list, simply type in their name or email in the search box on the right.

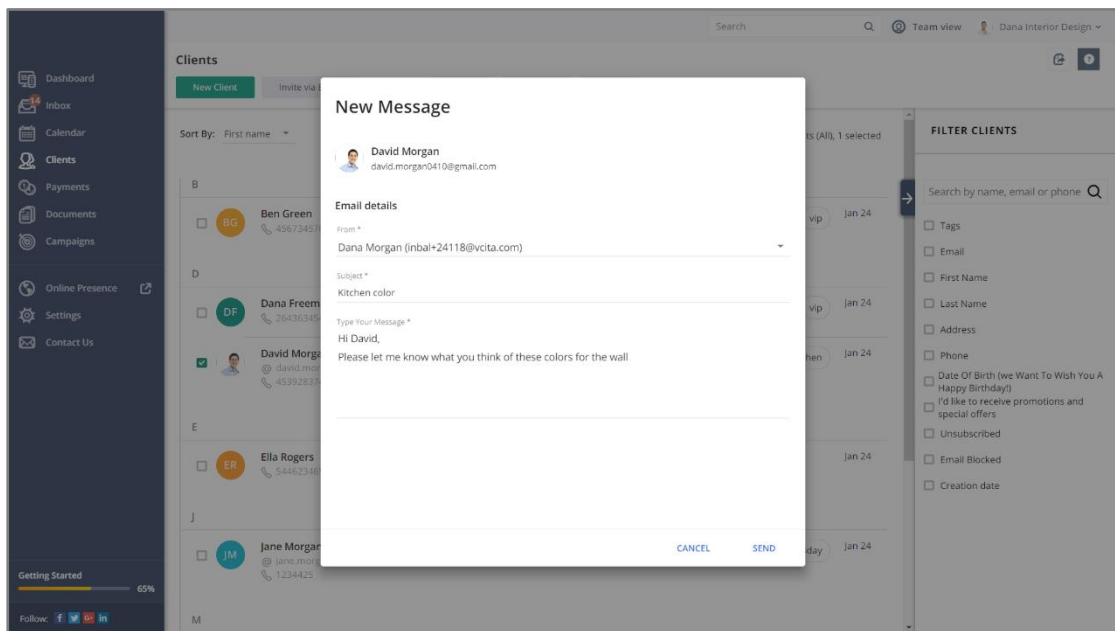
Click on the client's name to access the client card and view full information and start a new interaction like send a message, schedule an appointment, share a document, issue an invoice or record a payment.

## Send a Message:

From the client card page, click on **New>Message**.

Type in the Subject and the Message in the designated fields and click **Send**.

You will be directed to the conversation page where you will be able to see send/receipt status.

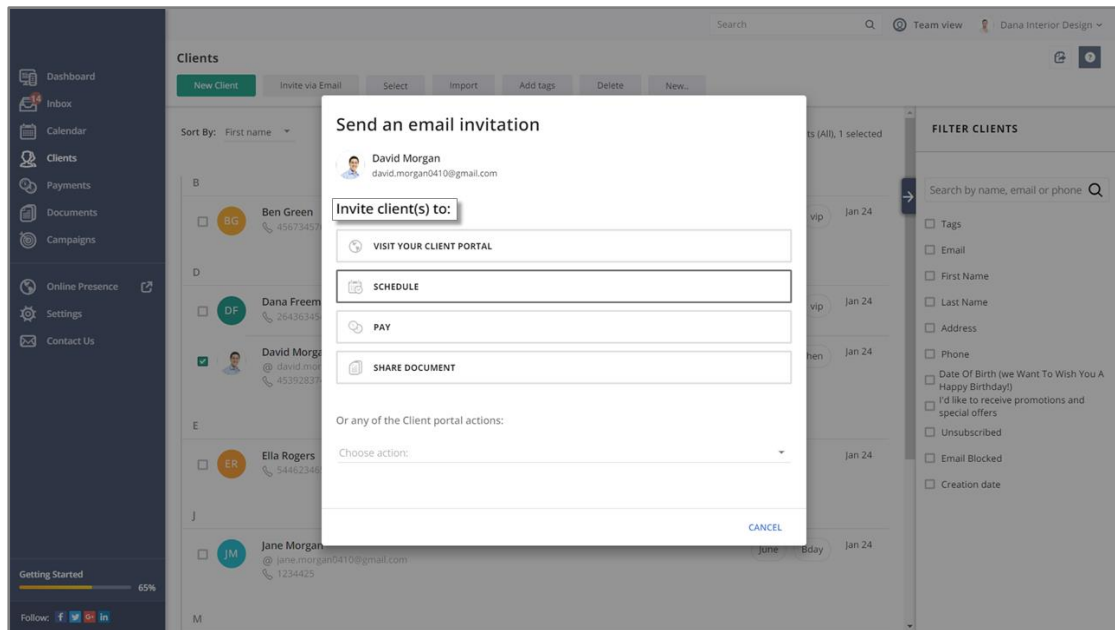


## Interact with multiple clients:

From the **Clients** page, check the box next to the clients you wish to contact. You can filter clients based on specific parameters like tags, or other client card information and use the **Select>All** button.

Once you selected the clients you wish to contact, click on **New** to send a message to all or share a document.

Alternatively, click on Invite Via Email and send the clients an invitation to visit your LiveSite, contact or schedule with you.

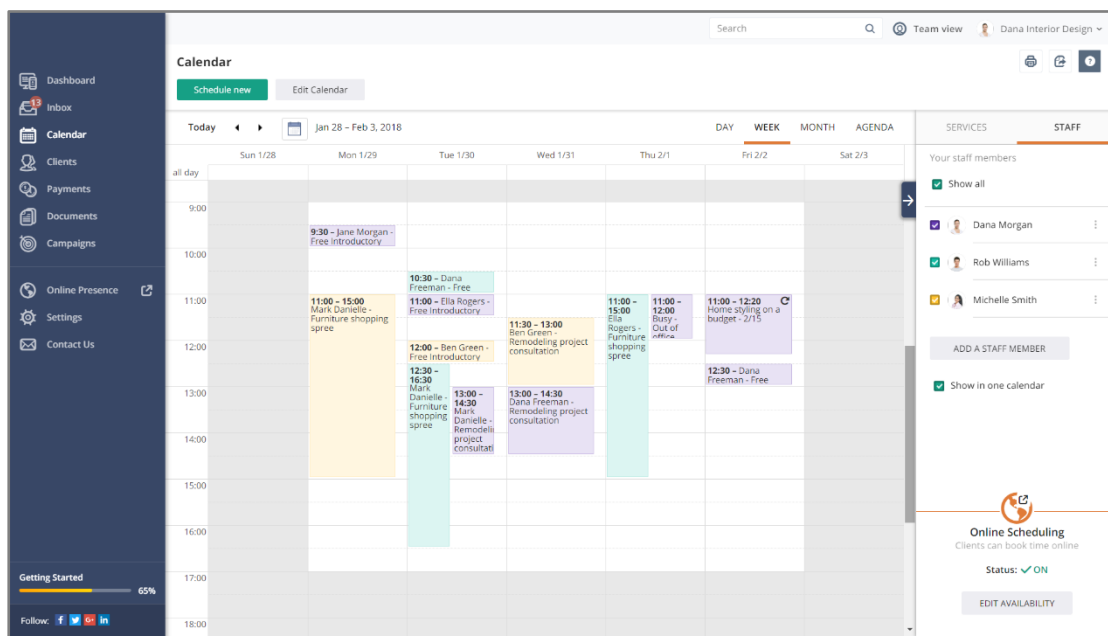




## Calendar:

The Calendar allows you to easily and effectively manage your meetings with your clients.

It is very important to schedule all the appointments from this calendar, so your clients will be notified and reminded about their upcoming appointment (helps to reduce “no-shows”) and so you will keep track of all the appointments you had with each client.



### Schedule a New Appointment with a Client:

Click on **Calendar** from the left navigation pane.

Find the desired date and click on the desired time slot. Select **Appointment**. Search hand find the client on your list or click Create New Client.

On the New Appointment page, select a service from your list or create a new service.

Complete all other information and click **Send**.

### View and Manage Appointments:

From the Calendar page, click on any appointment to view its content.

Within the appointment page, you can cancel, reschedule or if the meeting already took place, mark as completed.

You can send an Invoice to the client or Record a Payment.

Click on View Conversation to send a message to the client related to the meeting.

[Back to top](#)

## Payments:

The Payments page lists all the open/past due/completed payments, Estimates and invoices for your clients.

Here you can view and manage payments including issue a new estimate or an invoice, send a payment request, charge or record a payment that was made offline.

The screenshot displays the 'Payments Received' section of a software application. On the left is a dark sidebar with navigation options: Dashboard, Inbox, Calendar, Clients, Payments, Estimates, Invoices & Bookings, Payments Received (highlighted), Documents, Campaigns, Online Presence, Settings, and Contact Us. At the bottom of the sidebar is a 'Getting Started' progress bar at 65% and social media icons for Facebook, Twitter, and LinkedIn.

The main content area is titled 'Payments Received' and includes a search bar, 'Team view', and a user profile 'Dana Interior Design'. Below the title are tabs for 'New' and 'Manage Coupons'. A dropdown menu is open over the 'New' tab, listing: Record Payment, Charge, Invoice, Estimate, and Send payment link.

The payment list shows:

- PAID \$4510 USD
- CANCELLED AND REFUNDED \$140 USD
- 1 Payment · €45 Paid
- January 2018 4 Payments
- David Morgan: Payment for Home styling on a budget, \$45 USD, Created at: Jan 28
- Jane Morgan: Payment for Home styling on a budget, \$40 USD, Created at: Jan 28
- David Morgan: Payment for INVOICE #0000025, \$200 USD, Created at: Jan 26
- Dana Freeman: Payment for INVOICE #0000024, \$550 USD, Created at: Jan 25

On the right side, there is a 'FILTER PAYMENTS' section with a search field 'by client name', a 'Status' dropdown set to 'Paid, Cancelled, Refunded', and a 'Payment source' dropdown set to 'All'. A 'CLEAR SELECTION' button is located below the filters.

## Create a New Estimate:

From the Payments page, click on **New>Estimate**.

Search and select a client from your list or create a new client. Complete the Invoice details and add as many line items as you wish, add tax or discounts. Once you send the estimate to the client they will have the option to review and approve the estimate.

**Issue invoice** - Issue an invoice based on the selected estimate.

[Back to top](#)

### **Create a New Invoice:**

From the Payments page, click on **New>Invoice**.

Search and select a client from your list or create a new client. Complete the Invoice details and add as many line items as you wish, add tax or discounts. You can enable the option for your clients to pay online using a Credit Card or with PayPal. Your client will receive the invoice over email.

### **Manage Payments:**

Click on any payment item on your list.

If the payment was completed offline, you can **Mark as Paid** and record this information.

If needed you can also cancel, edit or archive.

Click on **View Conversation** to send a message to the client related the specific payment.

### **Record a Payment:**

You can easily track your whole revenue stream by adding payments that were made offline.

To record a payment that is not listed on the Payments page, click on **New>Record Payment**.

Search and find a client from your list or create a new one.

Enter the payment details including the price and how the payment was made – cash, check or any other way.

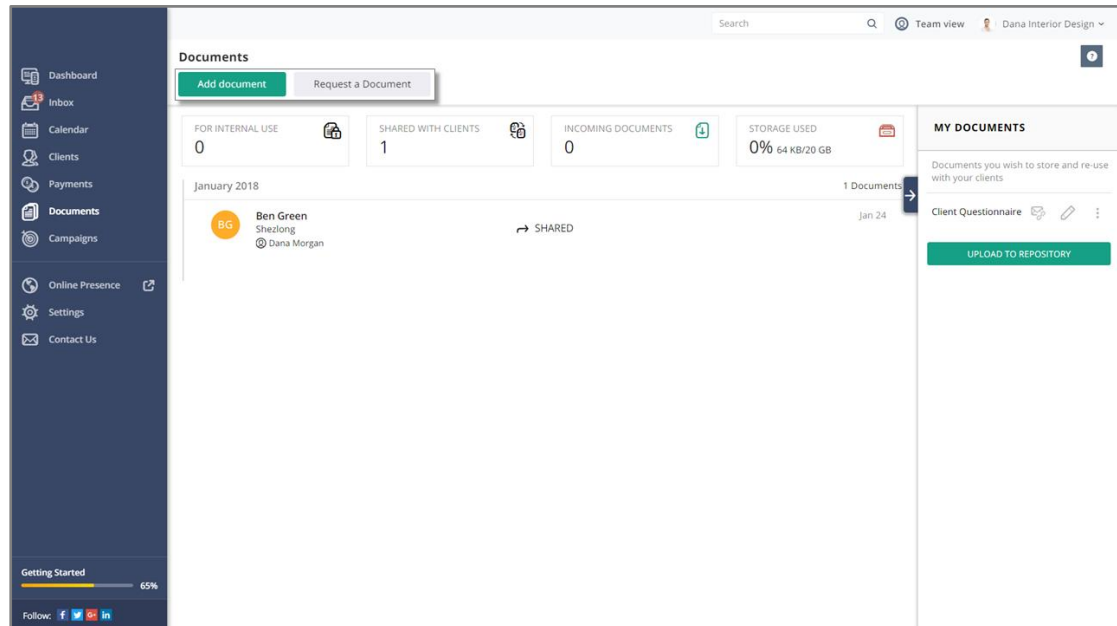
[Back to top](#)

## Documents:

The Documents page lists all the documents you shared or your clients shared with you.

On the right-side pane, you can upload documents that you need handy to share with your clients, like a document library.

You can also attach a file to a specific client for internal review.



## Add a Document:

To share a document with one or more clients, click on **Add Document**. Select one or more clients from your list or create a new client. Click **Continue**. Choose **From 'My Documents'** and select the desired file.

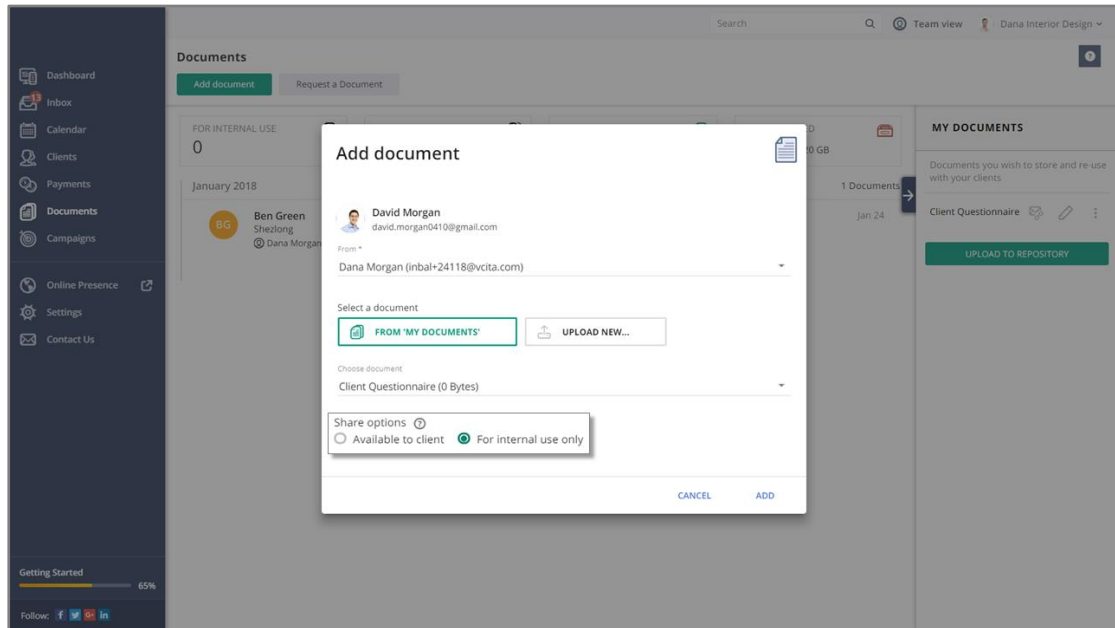
Or **Upload New** and browse your computer folders.

Under **Share options** select **Available to client**. Type your message to the clients. Click **Send**.

[Back to top](#)

## Add a Document for internal use:

To add a document to a client card for your internal use and record, click on **For internal use only** under **Share options**.



## Request a Document:

Send your client an email and invite them to send you a file.

Click on Request a Document. Search and select one or more clients from your list or create a new one. Click **Continue**.

Complete the email information and click **Send**.

[Back to top](#)

## Campaigns

Campaigns are an effective tool to promote your offered services, driving more business and revenue from clients. You can use campaigns to target existing clients or new prospects, inviting them to book an appointment, register for a class, make a payment and more. The campaigns are all about getting clients to interact with your business, and that's why they are built around a specific call-to-action (book/schedule/pay etc.).

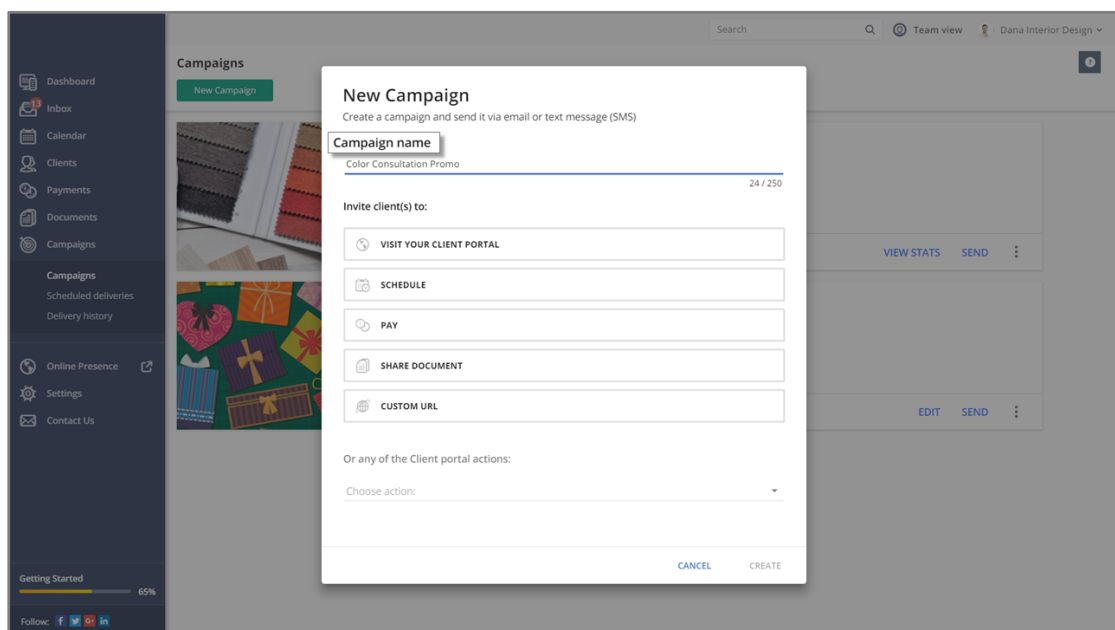
Creating and sending a campaign is simple and quick, and you can even do it while on-the-go from your mobile device. You will also be able to track campaign results in real time, including delivery stats and client actions. No design skills are necessary - you can easily create and send beautiful, mobile-friendly emails that will engage your clients and increase your revenue.

### Creating New Campaign:

From the left navigatino pane, click on **Campaigns>New Campaign**.

Enter the Campaign name.

Select the call to action you wish to promote and click **Create**.

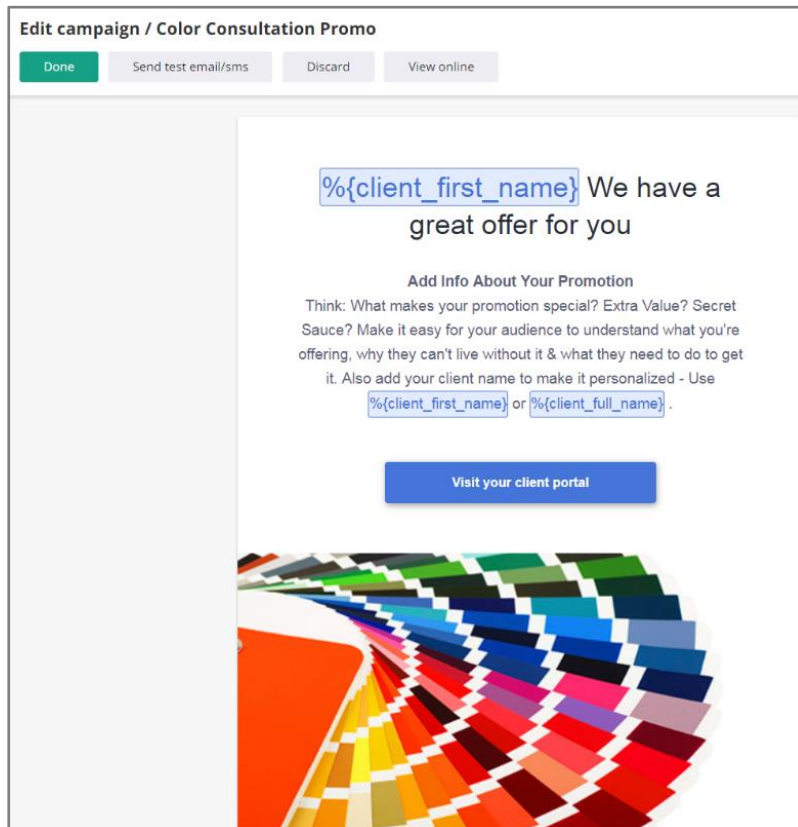


The screenshot shows a software interface with a dark sidebar on the left containing navigation options: Dashboard, Inbox, Calendar, Clients, Payments, Documents, Campaigns, Campaigns (sub-items: Scheduled deliveries, Delivery history), Online Presence, Settings, and Contact Us. The main content area is titled 'Campaigns' and features a 'New Campaign' button. A modal window titled 'New Campaign' is open, containing the following fields and options:

- Campaign name:** A text input field with the value 'Color Consultation Promo' and a character count '24 / 250'.
- Invite client(s) to:** A list of five call-to-action options, each in a separate input field:
  - VISIT YOUR CLIENT PORTAL
  - SCHEDULE
  - PAY
  - SHARE DOCUMENT
  - CUSTOM URL
- Or any of the Client portal actions:** A dropdown menu labeled 'Choose action:'.
- Buttons:** 'VIEW STATS' and 'SEND' are visible on the right side of the modal. At the bottom right, there are 'CANCEL' and 'CREATE' buttons.

[Back to top](#)

## Email Template:



Edit the email title, content, action button text and choose an image from the gallery or upload your own.

When you're happy with the result, click on **Done** or **Send test email/SMS**.

## Send:



To send your campaign, click on the **Send** button.

### Send

Choose channel

EMAIL  TEXT MESSAGE (SMS)

This is your text message:

Dana Interior Design: %{client\_first\_name} We have a great offer for you  
{%link}

92 / 160

You can make this message more personalized by using client first name %{client\_first\_name} or full name %{client\_full\_name} parameters.

If client's phone number is not available

Don't send  Send via email

Note: Recipients list may include non opt-in clients ⓘ

[NOT NOW](#) [CONTINUE](#)

Select between the email or SMS options and adjust the campaign title if needed. For SMS you can customize the message of the SMS itself.

Click on **Continue**.

[Back to top](#)

### Select campaign recipients

+

By clients  
 By tags

Select 0 / 8

- All Clients (8)
- vip (3)
- June (1)
- Bday (1)
- kitchen (1)
- kids (1)

CANCEL CONTINUE

Select recipients - you can search and select specific clients or filter by specific tags or select all clients. Then click on **Continue**.

### All set?

Choose time

Send now
  Schedule for later

Summary

Your campaign "Color Consultation Promo" is about to be sent out to:

- 312 Email recipients  
 Subject: %{client\_first\_name} We have a great offer for you
- 1 Will not be Delivered  
 1 do not have a phone number

Before you send, please ensure you comply with our [anti-spam requirement](#).

CANCEL SEND NOW

Review the summary and click on **Send Now** and your campaign will go out to your clients.

### Stats:

After the campaign was sent, you can see the campaign statistics.

Styling on a budget					
Sent on Sun, January 28 at 8:22					
SENT	DELIVERED	VIEWED	CLICKED	ENGAGED	BOUNCED
321	318	273	238	201	3

VIEW STATS SEND

Click on 'view stats' where you can see the different stats categories – Delivered, Viewed, Clicked, Engaged – the clients that contacted you following the campaign. Click on any category to see the list of clients under it.

If you'd like to send the campaign again or to additional clients, click on **Send**

[Back to top](#)