

DYL's Full Workflow Guide

Features Guide V1 | March Release 2018



The Intelligent Business Phone System

OVERVIEW

Status	Action Date	Type	Contact	Workflow	Actions
Overdue	Today 09:58:51	Call	Mr. Frida Turcotte	Customer Referral Plan	
Upcoming	Tomorrow 09:58:51	Text	Mr. Frida Turcotte	Customer Referral Plan	
Upcoming	2018-03-17 09:58:51	Call	Mr. Frida Turcotte	Customer Referral Plan	
Cancelled	Today 17:48:14	Text	Mr. Frida Turcotte	Customer Referral Plan	
Overdue	Today 07:50:40	Call	Text	Customer Referral Plan	
Upcoming	Tomorrow 07:50:40	Text	Text	Customer Referral Plan	
Upcoming	2018-03-17 07:50:40	Call	Text	Customer Referral Plan	

Are you sure?

What Are Workflows?

- Workflows will automate your follow-up calls, texts, emails, and tasks in a pre-set sequence.
- You can use Workflows for sales, customer service, or any other purpose.
- Workflows will replace our older email drip and callback sequences.

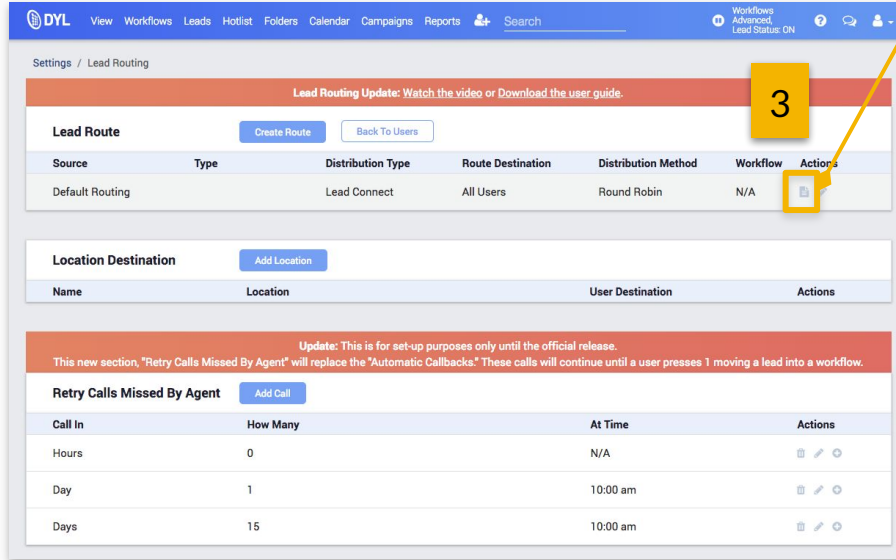
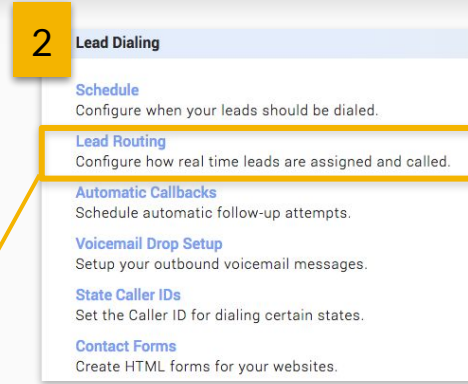
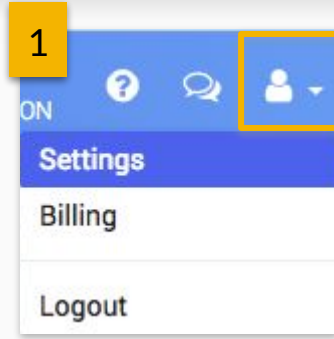
***** IMPORTANT ***** If you have existing email drips and callback sequences, you will need to move them to Workflows. Email drips will be stored in a folder with the previous email drip name.

Visit our [Help page](#) for more information.

Lead Routing Settings

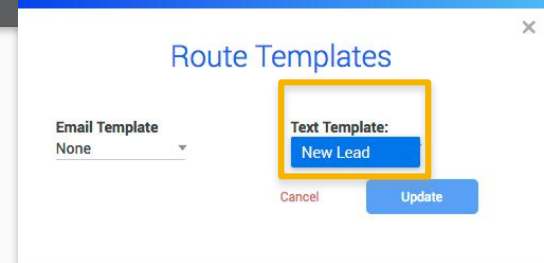
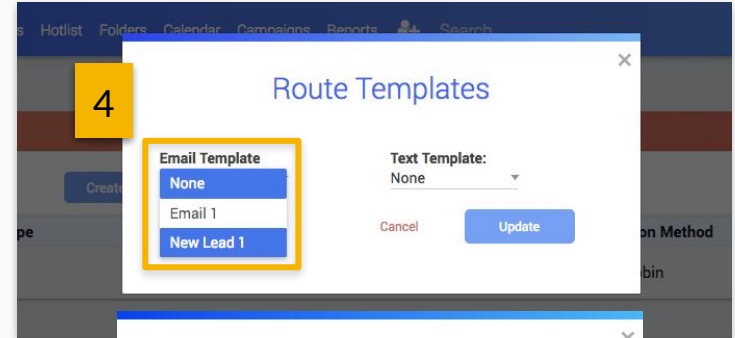
IMPORTANT: Set up one time email and text “Route Templates” for real time leads when they come in.

[Watch this video for more info.](#)



Select the template icon

Choose your Email and Text Template, then “Update”.



Settings / Configure User Roles

This screen will set up your User Roles (Sales, Service, etc) for different Workflows.

You can set permissions for re-assigning Workflows from one department to another (Sales to Service, for example).

Settings / Configure User Roles

User Role Assignments Edit

Role assignment gives your users the ability to reassign leads and change the current workflow a prospect or customer is currently in.

Role assignment is set.

User Roles Add Role

Name	Users	Can take leads in roles	Command
Dist ring group 1	Preston Hill, James Test, Nancy Le	None	Edit Delete
Tablet User	SM-Phill Tab10.1	None	Edit Delete
WorkFlow Router	Workflows Advanced	None	Edit Delete

Settings / Configure User Roles

User Role Assignments Update Cancel

Role assignment gives your users the ability to reassign leads and change the current workflow a prospect or customer is currently in.

User Roles Add Role

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Settings / Configure User Roles

User Role Assignments Edit

Role assignment gives your users the ability to reassign leads and change the current workflow a prospect or customer is currently in.

Role assignment is set.

User Roles Cancel Update

Add Role NEW ROLE

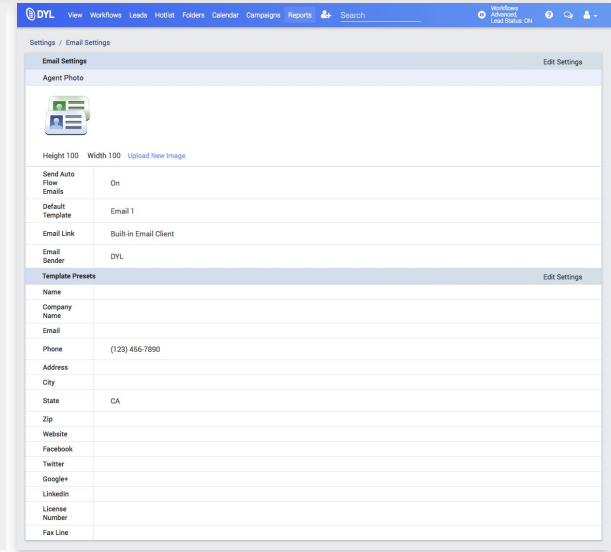
Name	Users	Can take leads in roles	Command
Dist ring group 1	Preston Hill, James Test, Nancy Le	None	Edit Delete
Tablet User	SM-Phill Tab10.1	None	Edit Delete
WorkFlow Router	Workflows Advanced	None	Edit Delete

Workflow Settings

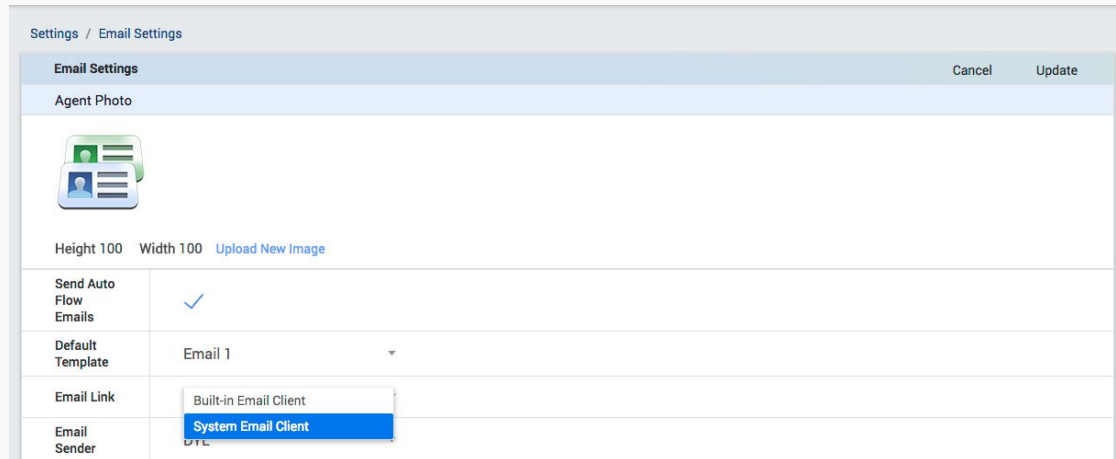
Before Creating a Workflow:

You will need to create user roles and enable permissions **before creating Workflows.**

*****IMPORTANT***** You may either send your emails through DYL or configure your external email provider. *Visit our [Help page](#) for more information.*



*****CONNECTING TO EMAIL PROVIDERS*****

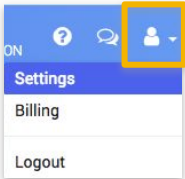


Settings > Workflow List

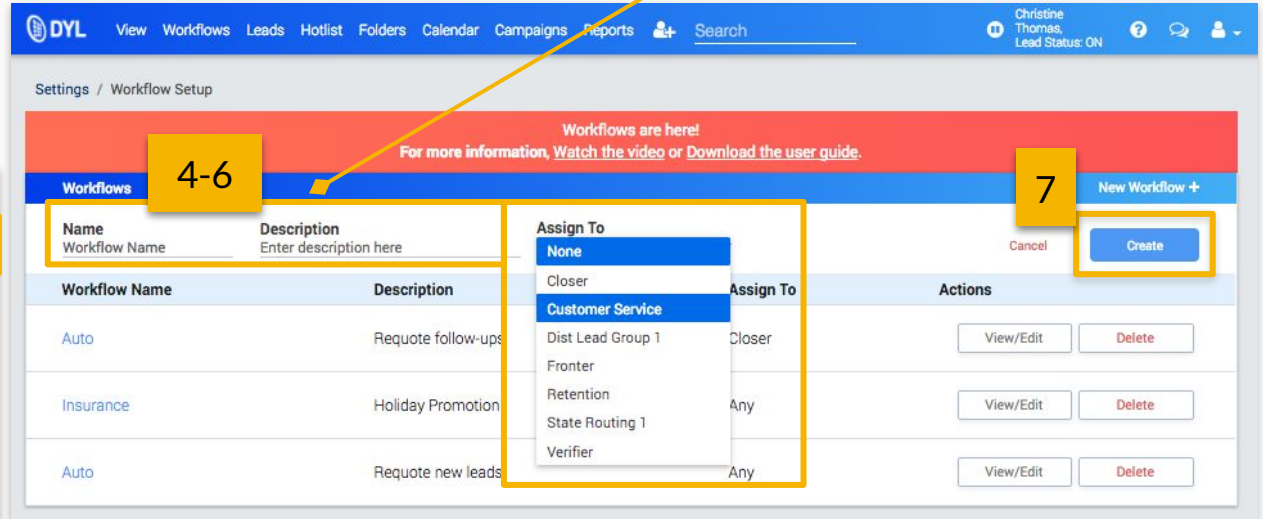
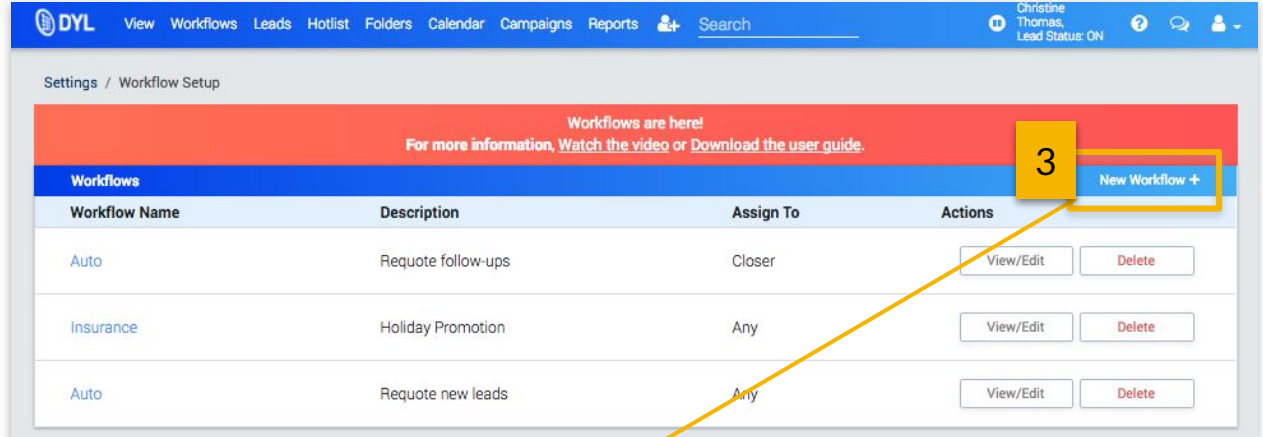
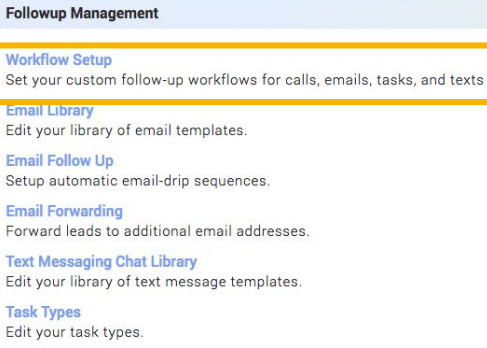
To create a new Workflow:

1. Go to Settings
2. Workflow Setup
3. Click New Workflow
4. Name your Workflow
5. Add a description
6. Assign to (by role or user), then:
7. Click Create

1



2



Workflow List

Use a pre-set Workflow

Workflow Name
Auto, No Home
Customer Referral Plan
Future Requote Plan
Home, No Auto
Life/Retirement
New Lead
Quoted
Tester 2
Winback Plan

Choose from several pre-set Workflow sequences
You can use as-is or customize to your business need.

Settings / Workflow Setup

Workflows are here!
For more information, Watch the video or Download the user guide.

Workflows				New Workflow +	
Workflow Name	Description	Assign To	Actions		
Auto, No Home	Requote follow-ups	Closer	View/Edit	Delete	
Customer Referral Plan	Holiday Promotion	Any	View/Edit	Delete	
Future Requote Plan	Requote new leads	Any	View/Edit	Delete	

Confirm if deleting

Are you sure?

Settings

Workflow Creation/Editing Page

DYL View Leads Hotlist Workflows Folders Calendar Campaigns Reports Search Workflows Advanced Lead Status: OFF

Settings / Workflows / 22

Auto Loan No reassignment

Followup

Add Call Add Text Add Email Add Task

Action 1 - Text Delete

Content: I just sent you the quote.

Shortcodes Address My Full Name My Company My First Name My Phone City First Name Last Name Full Name Phone State Zip

Deliver In: Days How Many Days: 1 At Time: 9:30 am

Action 2 - Email Delete

Select Template

Subject: Follow Up

Content: Hey! Advanced

Shortcodes Address My Full Name My Company My First Name My Phone City First Name Last Name Full Name Phone State Zip

Deliver In: Days How Many Days: 1 At Time: 9:30 am

Action 3 - Task Delete

Priority: 1 Task Type: Task2

Note: Fax the new policy.

Deliver In: Weeks How Many Days: 1

Action 4 - Call Delete

Deliver In: Days How Many Days: 1 At Time: 9:30 am

Global Save Button

Assign to (if you haven't already) or **edit** who receives the Workflow Assignment.

Add to your Workflow: by clicking one of the icons to add a:

- Call
- Text
- Email
- Task

NOTE: after adding a new action from the icon bar, a new item is directly added to the right (of wherever inserted from).

Global Save Button Save your items at once after creating all your Workflow Actions.

Add your first workflow item by clicking one of these buttons

Select your template

Customize Your delivery times for each action

Workflow Setup

Shortcodes

The screenshot displays a workflow configuration interface with a blue header bar containing navigation links (View, Leads, Hotlist, Workflows, Folders, Calendar, Campaigns, Reports) and a search bar. The main content area is titled "Settings / Workflows / 22" and shows a workflow step for "Auto Loan" with an "Assign To" dropdown set to "No reassignment". Below this are buttons for "Add Call", "Add Text", "Add Email", and "Add Task".

Four workflow actions are visible:

- Action 1 - Text:** Contains a text block with a placeholder: "Hey %FIRST%%, It's %%AGENT%% at %%AGENT_COMPANY%% We appreciate the opportunity to earn your auto insurance business. We talked about property insurance but didn't set that up... can I update that for you?". A yellow box highlights a "Shortcodes" palette with buttons for: Shortcodes, Address, My Full Name, My Company, My First Name, My Phone, City, First Name, Last Name, Full Name, Phone, State, and Zip. Below the palette are fields for "Deliver In:" (Days), "How Many Days:" (1), and "At Time:" (9:30 am).
- Action 2 - Email:** Includes a "Select Template" dropdown, "Subject:" (Follow Up), and "Content:" (Hey!).
- Action 3 - Task:** Includes "Priority:" (1), "Task Type:" (Task2), and a "Note:" field with the text "Fax the new policy.".
- Action 4 - Call:** Includes "Deliver In:" (Days), "How Many Days:" (1), and "At Time:" (9:30 am).

Personalize every text & email with shortcodes. These will automatically import system information dynamically.

Advanced Email Options

New Customization!

Customize your emails using our **Advanced** feature for formatting, attaching, and inserting HTML, and more!

Note: This option is also on Lead Details.

Action 2 - Email Delete

Select Template ▾

Subject:
Follow Up

Content:
Hey!

Advanced

Shortcodes: Address My Full Name My Company My First Name
My Phone City First Name Last Name Full Name Phone State
Zip

Deliver In: Days ▾ How Many Days: 1 ▾ At Time: 9:30 am ▾

Click
"Advanced"
to see more
options

Email Template (Advanced view)

Email

To: sample@gmail.com

Test

File ▾ Edit ▾ View ▾ Insert ▾ Format ▾ Table ▾

Formats ▾ **B** *I* [List Icons] [Link Icon] [Print Icon] [Eye Icon] [Code Icon]

Shortcodes ▾

Several formatting options

Copy/paste in your own HTML

0 WORDS

Attach

Cancel Send

Emails

New Customization!

- Users can set Workflow emails to go out automatically or manually.
- If a lead unsubscribes from an email (or the user removes the email address from the lead's page), that will remove the follow-up emails in the Workflow.


Visit our [Help page](#) for additional information.

Settings / Email Settings

Cancel Update

Email Settings

Agent Photo



Height 100 Width 100 [Upload New Image](#)

Send Auto Flow Emails	<input checked="" type="checkbox"/>
Default Template	Email 1
Email Link	<input type="text" value="Built-in Email Client"/>
Email Sender	<input type="text" value="System Email Client"/>

- Tasks consist of any activity that doesn't occur at a specific time.
- Users schedule tasks by date.

The screenshot displays the DYL CRM interface. At the top, a navigation bar includes the DYL logo and menu items: View, Workflows, Leads, Hotlist, Folders, Calendar, Campaigns, Reports, and a Search bar. On the right of the navigation bar, it shows the user's name 'Matt Vandervort' and 'Lead Status: OFF'. Below the navigation bar, the breadcrumb path is 'Settings / Workflows / Fake'. The main content area features a 'Follow-up' section with an 'Auto' dropdown and an 'Assign To' dropdown set to 'No reassignment'. To the right of this section are four buttons: 'Add Call', 'Add Text', 'Add Email', and 'Add Task', with the 'Add Task' button highlighted by a yellow border. Below this is a detailed configuration panel for 'Action 1 - Task', also highlighted with a yellow border. This panel includes a 'Delete' link, a 'Priority' dropdown set to '1', a 'Task Type' dropdown set to 'tas1', a 'Note' field containing 'Review Policy.', a 'Deliver In:' dropdown set to 'Days', and a 'How Many:' dropdown set to '1'. A vertical toolbar on the right side of the configuration panel contains icons for adding, calling, messaging, emailing, and scheduling.

Call Details

- Calls will ring a user's phone at the pre-set time. (Users MUST be unpaused and not on a system initiated call).
- If the user is on another system initiated call, the new Workflow call will wait in the "Call Now" queue.
- If the user is on an inbound or manual outbound call, the Workflow call will attempt to ring the user.
- Missed calls will be marked as Overdue (missed).
- Once the user makes a Workflow call attempt, it will be marked Complete.
- Missed calls will be marked as Contacted after a successful call attempt (click-to-dial call, inbound call, etc)

Settings / Workflows / Fake

Auto Assign To
No reassignment

Follow-up Add Call Add Text Add Email Add Task

Action 1 - Call Delete

Deliver In: Days How Many: 1 At Time: 9:30 am

DYL View Workflows Leads Hotlist Folders Calendar Campaigns Reports Search

Workflows Advanced, Lead Status: ON

March, 11 - 17 2018

Show 25 Entries

Status	Action Date	Type	Contact	Workflow	Actions
Overdue Mark as completed	Today 09:58:51	Call	Mr. Frida Turcotte	Customer Referral Plan	Call Delete
Upcoming Mark as completed	Tomorrow 09:58:51	Text	Mr. Frida Turcotte	Customer Referral Plan	Text Delete
Upcoming Mark as completed	2018-03-17 09:58:51	Call	Mr. Frida Turcotte	Customer Referral Plan	Call Delete

Workflow Dashboard

Workflow Dashboard + Lead Detail

Shows All Activity

- Rescheduling an action item (call, text, email, task) will reschedule ALL remaining items in the workflow by that amount of time.
- Users can perform/edit or cancel individual action items in the workflow from the Workflow Dashboard or from the lead's page.
- After a user completes an action item for the day, the item will be "Marked as Completed."
- Users may also individually mark an item "Completed" manually (with a confirmation).

The screenshot shows the Workflow Dashboard for a lead named Mr. Frida Turcotte. The dashboard has a blue header with navigation tabs: View, Workflows, Leads, Hotlist, Folders, Calendar, Campaigns, Reports, and Search. Below the header, there are filters for 'Today' and a date range 'March, 11 - 17 2018'. On the right, there are buttons for 'Month', 'Week', and 'Day'. Below these are filters for 'All' (15), 'Overdue' (2), and 'Upcoming' (15). The main area is a table with columns: Status, Action Date, Type, Contact, Workflow, and Actions. The table lists several action items, some marked as 'Overdue' or 'Upcoming'. A yellow box highlights the 'Workflows' tab in the header and the 'Month', 'Week', 'Day' buttons. Another yellow box highlights the 'All', 'Overdue', and 'Upcoming' filters. A third yellow box highlights a 'View/Edit' popup menu over one of the rows, showing options for 'View/Edit', 'Delete', and 'Mark as completed'.

Status	Action Date	Type	Contact	Workflow	Actions
Overdue	Today 09:58:51	Call	Mr. Frida Turcotte	Customer Referral Plan	[Phone] [X]
	Tomorrow 09:58:51	Text	Mr. Frida Turcotte	Customer Referral Plan	[Text] [X]
	2019-03-17 09:58:51	Call	Mr. Frida Turcotte	Customer Referral Plan	[Phone] [X]
Canceled	Today 17:48:14	Text	Mr. Frida Turcotte	Customer Referral Plan	
Overdue	Today 07:50:40	Call	Test	Customer Referral Plan	[Phone] [X]
Upcoming	Tomorrow 07:50:40	Text	Test	Customer Referral Plan	[Text] [X]
Upcoming	2018-03-17 07:50:40	Call	Test	Customer Referral Plan	[Phone] [X]

The screenshot shows the Lead Detail page for Mr. Frida Turcotte. The page has a blue header with navigation tabs: View, Workflows, Leads, Hotlist, Folders, Calendar, Campaigns, Reports, and Search. Below the header, there are filters for 'Today' and a date range 'March, 11 - 17 2018'. On the right, there are buttons for 'Month', 'Week', and 'Day'. Below these are filters for 'All' (15), 'Overdue' (2), and 'Upcoming' (15). The main area is divided into sections: Contact Info, Actions, Sticky Note, Agenda, and History. The Actions section shows a list of workflow actions, including 'Update Status', 'Disposition Working', 'Workflow', 'Organize', 'Route To', 'Add To Folder', and 'Voicemail Left'. The Agenda section shows a list of action items for the current day, including 'Call Customer Referral Plan' and 'Text Customer Referral Plan'. A yellow box highlights the 'Complete' button in the top right corner of the Agenda section. Another yellow box highlights a 'View/Edit' popup menu over one of the items in the Agenda section, showing options for 'View/Edit', 'Delete', and 'Mark as completed'.

Lead Type:	Activity:	Received:
Auto	Wed, Mar 14, 2018 - 08:20 PM	Fri, Aug 11, 2017 - 03:53 PM
Lead ID:	External ID:	
19887244	39823423	
Current Insurance		
Current Carrier: AAA	Current Coverage: 100/300	Coverage Duration: 2 yrs., 0 mo.
Policy Expiration: 4-16-2009		
Requested Policy		
Requested Coverage: 100/300	Medical Coverage: \$10,000	

NEW Workflow Dashboard

Shows All Activity

The new Dashboard allows you to see all of your follow-up items at a glance.
Sort by: Status, Action Date, Type or Workflow.

Search by Contact

The Workflow dashboard displays action items by date: month, week, day or a custom range.

Filter by: Overdue, Upcoming, and Completed leads.

Completed or cancelled items go to reporting.

The screenshot shows the 'Workflows' section of a software interface. At the top, there's a navigation bar with 'View Workflows Leads Hotlist Folders Calendar Campaigns Reports' and a search bar. Below this is a date range selector for 'March, 11 - 17 2018' with buttons for 'Month', 'Week', 'Day', and a calendar icon. A filter bar shows 'All 16', 'Overdue 2', and 'Upcoming 13'. The main area is a table with columns: Status, Action Date, Type, Contact, Workflow, and Actions. A 'Status' dropdown menu is open on the left, showing options: Upcoming (checked), Overdue, Complete, and Canceled. A 'Workflow' dropdown menu is open on the right, showing options: Customer Referral Plan, Future Requote Plan, Home, No Auto, Life/Retirement, New Lead, Quoted, Tester 2, and Winback Plan. A 'Date Range' dropdown is open on the far right, showing options: Today, Yesterday, This Week, Last Week, This Month, Last Month, Year To Date, and Custom Range. A 'Are you sure?' dialog box is open at the bottom left with 'No' selected. A 'View/Edit' dialog box is open at the bottom left with 'Delete' selected.

Status	Action Date	Type	Contact	Workflow	Actions
Overdue	Today 09:58:51	All	Mr. Frida Turcotte	Customer Referral Plan	Phone, X
Upcoming	Tomorrow 09:58:51	Call	Mr. Frida Turcotte	Customer Referral Plan	Phone, X
Upcoming	2018-03-17 09:58:51	Text	Mr. Frida Turcotte	Customer Referral Plan	Phone, X
Canceled	Today 17:48:14	Text	Mr. Frida Turcotte	Customer Referral Plan	Phone, X
Overdue	Today 07:50:40	Call	Test	Customer Referral Plan	Phone, X
Upcoming	Tomorrow 07:50:40	Text	Test	Customer Referral Plan	Phone, X
Upcoming	2018-03-17 07:50:40	Call	Test	Customer Referral Plan	Phone, X

Workflow Dashboard

Edit Mode

The screenshot displays the Workflow Dashboard interface. At the top, the navigation bar includes 'View Workflows', 'Leads', 'Hotlist', 'Folders', 'Calendar', 'Campaigns', 'Reports', and a search bar. The main header shows the date 'March, 11 - 17 2018' and view options for 'Month', 'Week', and 'Day'. Below the header, there are filters for 'All 16', 'Overdue 2', and 'Upcoming 13'. The main content area is a table with the following columns: Status, Action Date, Type, Contact, Workflow, and Actions. The table contains seven rows of workflow entries. The 'Actions' column for each entry contains icons for 'Call' (phone) and 'Cancel' (X). A modal window titled 'Text Message' is open, showing a text message template for 'Ted' with a 'Consent To Text Messaging' checkbox checked. An arrow points from the 'Cancel' button in the modal to the 'Cancel' button in the workflow actions column.

Status	Action Date	Type	Contact	Workflow	Actions
Overdue ✓ Mark as completed	Today 09:58:51	Call	Mr. Frida Turcotte	Customer Referral Plan	[Phone] [X]
Upcoming ✓ Mark as completed	Tomorrow 09:58:51	Text	Mr. Frida Turcotte	Customer Referral Plan	[Message] [X]
Upcoming ✓ Mark as completed	2018-03-17 09:58:51	Call	Mr. Frida Turcotte	Customer Referral Plan	[Phone] [X]
Canceled	Today 17:48:14	Text	Mr. Frida Turcotte	Customer Referral Plan	
Overdue ✓ Mark as completed	Today 07:50:40	Call	Test	Customer Referral Plan	[Phone] [X]
Upcoming ✓ Mark as completed	Tomorrow 07:50:40	Text	Test	Customer Referral Plan	[Message] [X]
Upcoming ✓ Mark as completed	2018-03-17 07:50:40	Call	Test	Customer Referral Plan	[Phone] [X]

To edit, send or cancel texts and emails before going out.

Click the icon to display the modal

Cancel your workflow action

- Workflow texts must be sent manually each day.
- Users must confirm they have consent to text the recipient.
- Texts will only go out during business hours.

Pause “On” or “Off”: If you’re paused, then everything is offset and go into “Missed.”

Reschedule Your Workflow

Reschedule your Workflow's delivery date.

Note: this will change all subsequent events in that workflow.

- 1) It will be possible for some events to be scheduled after hours.

Note: When events are completed after hours, the user will need to check off the "Mark as completed" box on the Dashboard or Agenda (on Lead Details).

The screenshot shows the DYL interface with a modal window for rescheduling a workflow. The modal window is titled "Workflow Name" and displays a calendar for March 2018. The date 15 is selected. Below the calendar, there are options to "Select Date" (Mar 17, 2018) and a summary of the action: "This action modifies the date for this event and the subsequent 5 items by 0 Days." At the bottom, there are three buttons: "CALLS" (4), "EMAILS" (0), and "TEXTS" (2). A "Reschedule" button is highlighted in blue.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Select Date
Mar 17 2018

This action modifies the date for this event and the subsequent 5 items by 0 Days.

CALLS 4
EMAILS 0
TEXTS 2

Cancel Reschedule

Assigning Leads to a Workflow

New Lead Details page

Assign a Workflow

Workflow

Assigned To

- Unassigned
- Monty Dwyer
- Marvin Burns
- James Test
- Nancy Le**
- Preston Hill
- SM-Phill Tab10.1

Select a Workflow

Workflow

- None**
- Auto, No Home
- Customer Referral Plan**
- Future Requote Plan
- Home, No Auto
- Life/Retirement
- New Lead
- Quoted
- Tester 2
- Winback Plan

Mr. Frida Turcotte
Current Profile

Contact Info

Name: Mr. Frida Turcotte
Lead Type: Auto
Email: sample@gmail.com
Primary Number: (858) 205-2925
Address: 453 Tremble Ave, Columbus, OH, 43201
Birthday: 2-1-1953 (56)
Source: Test

Actions

Update Status
Disposition: Working
My Hotlist:
Workflow: Assigned To Workflows Advanced, Workflow Customer Referral Plan
Organize: Route To Default Routing, Add To Folder Select Folder, Voicemail Left No Set

Workflow

Assigned To: Workflows Advanced
Workflow: Customer Referral Plan

History

All Outbound Inbound Notes Disposition Task

Date	Time	Activity	Phone Number	Duration	Tags
Sep 27	4:25 PM	Call Inbound	(424) 209-4923	0:09	(513) 288-0346
Aug 11	4:25 PM	Call Inbound	(424) 209-4923	0:12	(513) 288-0346
Aug 11	4:24 PM	Call Inbound	(424) 209-4923	0:04	(513) 288-0346
Aug 11	4:21 PM	Call Inbound	(424) 209-4923	0:08	(513) 288-0346

Edit, Send or Cancel your action item

Text Message

To: (858) 205-2925

Hey, looking forward to our meeting this week. Let me know if you need anything prior.

Ted

Characters Remaining 69

Attach

Consent To Text Messaging

I agree that I have consent allowing me to send this message and that the intended recipient has not previously opted out.

Cancel Save/Close Save/Send

Customized filters: Select checkboxes of what you want to see in History: all, outbound, inbound, notes, dispositions, tasks + uploads

NOTE: After moving a lead into a Workflow, it will assign it to yourself.

New Lead Details

Agenda: Workflow Actions

NEW FEATURE: View your scheduled Workflow Actions from the Agenda.

- Edit or cancel Workflow Actions from here.
- If you complete an Action outside of the system, check “Mark as Completed.”

The screenshot shows the lead details page for Mr. Frida Turcotte. The 'Agenda' section lists several workflow actions, including 'Call Customer Referral Plan' and 'Text Customer Referral Plan'. A yellow box highlights the 'Text Customer Referral Plan' action scheduled for Today at 9:58 am, which is marked as 'Overdue'. A yellow arrow points from this box to the 'Text Message' dialog box on the right.

Time	Action	Status
Yesterday 9:58 am	Call Customer Referral Plan	Mark as completed
Today 9:58 am	Text Customer Referral Plan	Mark as completed
Mar 17 9:58 am	Call Customer Referral Plan	Mark as completed
Mar 18 9:58 am	Call Customer Referral Plan	Mark as completed
Mar 19 9:00 am	Text Customer Referral Plan	Mark as completed
Mar 20 9:00 am	Call Customer Referral Plan	Mark as completed
Mar 22 10:00 am	Call Customer Referral Plan	Mark as completed

The screenshot shows the 'Text Message' dialog box for Mr. Frida Turcotte. The message content is: "Hey, looking forward to our meeting this week. Let me know if you need anything prior." The recipient is listed as "To: (858) 205-2925". There are buttons for "Cancel", "Save/Close", and "Save/Send". A checkbox for "Consent To Text Messaging" is checked, with the text: "I agree that I have consent allowing me to send this message and that the intended recipient has not previously opted out."

Lead Connect Report

Lead Connect > Reports

This Leads page shows your unassigned, uncalled internet leads (real-time leads, contact forms, etc).

Once leads are assigned, they will move to Workflows.

Note: This does not show live transfers or inbound calls.

Filter by ascending or descending order

The screenshot displays the 'Lead Connect' report interface. At the top, there are navigation tabs: View, Workflows, Leads, Hotlist, Folders, Calendar, Campaigns, Reports, and Search. The 'Leads' tab is active. Below the navigation, there are several filter sections: 'Browse By Timeframe' (Any), 'Browse By Date' (2017-03-14 to 2018-03-16), 'Lead Source' (All Leads), 'Lead Type' (Any), 'Disposition' (Any), and 'Call Now' (2). A 'Filter' button is located at the bottom right of the filter section. A yellow box highlights the 'Lead Connect' button in the top right corner. Below the filters is a table with 4 leads. The table has columns: Received, Source, Contact, Disposition, Assigned, Latest Note, and Actions. The leads are: 1) Received Yesterday 8:27 AM, Source User Input Contact, Contact Tough Sale (999) 555-1212, Disposition None, Assigned Workflows Advanced, Latest Note test. 2) Received Yesterday 8:03 AM, Source User Input Contact, Contact Easy Sale (424) 255-7245, Disposition Quoted, Assigned SM-Phill Tab10.1. 3) Received 11/14/17 11:29 AM, Source User Input Contact, Contact Test (605) 475-6968, Disposition None, Assigned Workflows Advanced, Latest Note Appointment: Thu, Mar 15, 2018 - 7:00 PM Just an appt. 4) Received 08/11/17 3:53 PM, Source Test Auto, Contact Mr. Frida Turcotte (858) 205-2925, Disposition Working, Assigned Workflows Advanced, Latest Note test note. Below the leads table is a date range selector for February, 11 - 17 2018, with buttons for Today, Month, Week, and Day. Below the date range is a table with columns: Received, Contact, Type, Missed Calls, Last Call, Next Call, and Actions. The table is sorted by Received in ascending order. The entries are: 1) Received 02/13/18 9:48 AM, Contact Rich Baxter, Type Link1st Auto, Missed Calls 2, Last Call 03/04/18 12:18 PM, Next Call N/A. 2) Received 02/13/18 9:49 AM, Contact Robert Craft, Type Link1st Auto, Missed Calls 1, Last Call 02/19/18 8:55 AM, Next Call N/A. 3) Received 02/13/18 9:48 AM, Contact Tessa Billings, Type Link1st Auto, Missed Calls 2, Last Call 02/13/18 9:48 AM, Next Call N/A. A yellow box highlights the 'Received' column header and the first three rows of the table. A yellow arrow points from the 'Lead Connect' button in the top screenshot to the date range selector in the bottom screenshot.

This links to your uncalled Report

Customize your Date ranges

The screenshot shows a date range selection dropdown menu. The menu is open, showing options: Today, Yesterday, This Week, Last Week, This Month, Last Month, Year To Date, and Custom Range. At the bottom of the menu are 'CANCEL' and 'APPLY' buttons.

Removing Workflows

Removing a lead from a Workflow

- Once a user marks a lead as Sold, that automatically stops the existing Workflow.
- Marking a lead as Do Not Call or with a Bad disposition (Bad Lead, etc) will also stop the Workflow. You can specify Bad dispositions in Settings---> Customize Dispositions

Settings / Customize Dispositions

[Add New Disposition](#) [Add New Disposition](#)

Deleting a disposition will set all leads with that disposition back to **None**. The disposition history for that disposition will also be permanently deleted.

Disposition List							Edit Dispositions	
Name	Good	Other	Bad	Call-Back	Customer Status	Show	Command	
Already Sold		✓		Remove	Current Customer	In Pop-Up List	Delete	
Bad Lead			✓	Remove		On Page	Delete	
Cancelled			✓	Remove	Cancelled Customer	In Pop-Up List	Delete	
Do Not Call			✓	Remove		In Pop-Up List	<i>Required</i>	
New Sale	✓			Remove	New Sale	On Page	Delete	
None		✓		Remove		In Pop-Up List	<i>Required</i>	
Not Interested			✓	Remove		On Page	Delete	
Not Qualified			✓	Remove		On Page	Delete	
Quoted	✓			Remove		On Page	Delete	
Working	✓			Remove		On Page	Delete	

Call Tags

Call Tags

Set-up

New Feature: Tag your calls for better tracking and reporting. Enhance your company's training, sales, customer service, etc.

Phone System

Phone Numbers

Setup phone numbers and call forwarding.

Extensions

Setup extensions and voicemail boxes.

IVR Prompts

Setup voice prompt messages.

Ring Groups

Manage extensions to ring for each group.

Music On Hold

Upload audio files that callers will hear.

Custom Routes

Create a detailed schedule for routing calls.

Tags

Create tags to categorize your calls.

Settings / Setup Tags

Tag Categories

Category Name

Name	Items	Tags	Delete
Answered	4	5	
Not Answered	0	1	

Tags

Tag Name Select Category Select Type

Name	Category	Type	Items	Delete
Callback	Answered	Call	0	
Cold Call	Answered	Call	4	
Don't Ever Call Again	Answered	Call	0	
Hot Call	Answered	Call	0	
Rude	Not Answered	Call	0	
Sold	Answered	Call	0	

Add new Tag Categories

Tags

Tag Name Select Category Select Type

Name	Category	Type	Items	Delete
Callback	Answered	Call	0	

Tags

Tag Name Select Category Select Type

Name	Category	Type	Items	Delete
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Users with settings access will be able to create/remove tags and tag categories.

Call Result Modal

New Tag Creation

You will now be able to associate a tag with a call result.

DYL View Leads Hotlist Folders Calendar Campaigns Reports Search Kris Sharma, Lead Status: OFF

Outbound
Curtis Closer
(323) 482-2395

Transfer Hangup

Curtis Closer
8572860453

Call Text Notes Fax Appointment Task Upload

Contact Info Edit

- Name: Curtis Closer
- Lead Type: Contact
- Primary Number: (555) 222-2395
- Other Numbers: (323) 482-2395

Actions

- Disposition: None (Sale)
- My Hotlist:
- Route To: Default Routing
- Assigned To: Unassigned (Assign to me)
- Voicemail Left

Sticky Note Save

Upcoming Events

No Upcoming Events

Select Call Result

Name	Number	Current Disposition
		None

Update Disposition

NEW SALE	BAD LEAD	NOT INTERESTED
NOT QUALIFIED	QUOTED	WORKING

Additional

Write your note here...

Call Tags:

Type to search

Select Call Result

Do Not Call Voicemail Reached Not Available

Select Call Result

Name	Number	Current Disposition
		None

Update Disposition

NEW SALE	BAD LEAD	NOT INTERESTED
NOT QUALIFIED	QUOTED	WORKING

Additional

Write your note here...

Call Tags:

c

- Answered - Callback**
- Answered - Cold Call
- Answered - Don't Ever Call Again
- Answered - Hot Call

Call Recording reports can be filtered by call tags for inbound calls.

- A modal will display individual call tags when clicked for inbound or outbound calls.

The screenshot shows a CRM interface for a lead named Jean grey (19918255). The top navigation bar includes 'DYL', 'View', 'Leads', 'Hotlist', 'Folders', 'Calendar', 'Campaigns', 'Reports', and a search bar. Below the navigation, there are tabs for 'Call', 'Text', 'Notes', 'Fax', 'Appointment', 'Task', and 'Upload'. The main content area is divided into three sections: 'Contact Info', 'Actions', and 'Sticky Note'. The 'Contact Info' section includes fields for Name, Lead Type, Primary Number, Address, Source, Merge Record, and Delete Lead. The 'Actions' section includes buttons for Disposition, My Hotlist, Assigned To, Voicemail Left, Add To Folder, Add To Text List, Follow Up, and Set Call Back. The 'Sticky Note' section is currently empty. Below the main content area, there is a 'History' section with a table of call events.

Date	Time	Call Type	Disposition
Nov 03	2:29 PM	Call Outbound	Missed Call
Nov 03	2:28 PM	Call Outbound	Transfer
Nov 03	2:25 PM	Call Outbound	Missed Call

Call Tags

The 'Call Tags' modal window displays call details for Mr. Frida Turcotte (Outbound call, Timestamp: Aug 11 3:54 PM). It shows a list of call tags: 'ca', 'Answered - Callback', 'Answered - Cold Call', 'Answered - Don't Ever Call Again', and 'Answered - Hot Call'. The 'Answered - Callback' tag is selected. Below the list is a search input field with the text 'Callback' and a 'Type to search' placeholder. There are 'Cancel' and 'Save' buttons at the bottom right.

Call Recordings

The 'Call Recordings' modal window displays call details for Jean grey (Transfer call, Timestamp: Nov 3 2:24 PM). It shows a call recording player with a progress bar at 0:00 / 0:03 and a play button. Below the player is a list of call tags: 'tag' and 'Insurance - allstate'. The 'Insurance - allstate' tag is selected. There are 'Cancel' and 'Save' buttons at the bottom right.

Three call history items are shown, each with a duration, phone number, and a 'Tags' button. The first item has a duration of 0:10 and a 'Tags' button highlighted with a yellow box. The second item has a duration of 0:16 and a 'Tags' button highlighted with a yellow box. The third item has a duration of 2:46 and a 'Tags' button highlighted with a yellow box. Arrows point from these highlighted buttons to the 'Call Tags' and 'Call Recordings' modals.