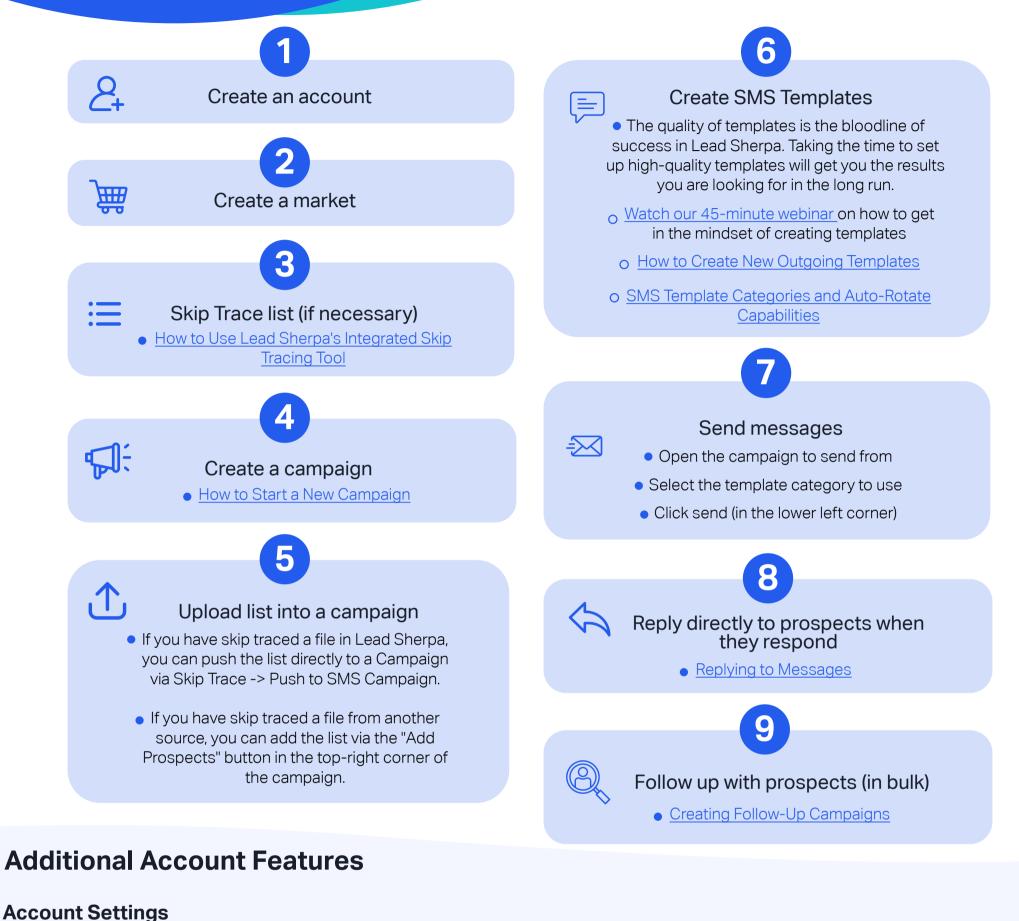
Basic Steps to Setting up a Lead Sherpa Account

SHERPA



Account Info & Settings

- Verify the time zone reflects the company time zone
- Change if necessary
- Billing Information

- Manage App Integrations
 - We currently have an API with Podio and Zapier.
 - O Integrate Lead Sherpa with Podio
 - O Zapier Setup: Connect to CRM Workspace
- Sequences
- oUsing Sequences to Schedule Prospect Follow-Ups
- Prospect Action Buttons
 Verified, DNC, Priority, Qualified, and Wrong

• Update payment method if necessary

User

- Add any users to the account
- o <u>Adding a new user and different types</u> of roles

Company

• <u>Select the campaign settings for the</u> <u>account to enable</u>

Lead Stages

 Set up any custom lead stages as desired. There are default stages that can not be removed, but an unlimited amount of custom lead stages can be added
 Custom Lead Stages

- Prospect Relay Settings

o <u>How to Use Prospect Relay</u>

- Tag Management
 - O <u>Creating Custom Tags and Distress</u> <u>Indicators</u>

Campaigns

Tags

- o Prospect Tags
- o How to Apply/Remove Tags from a Property
- Quick Replies
 - o <u>How to Search, Add, and Edit Quick Replies</u> Campaign Metrics
 - o Understanding Campaign Metrics

Number

Dashboard

Dashboard Metrics

 <u>Reading the Dashboard</u>

PropStack

List Stacking feature
 <u>Stacking Your Data Within PropStack</u>

Prospect Relay/Click to Call

Ways to call a prospect

 How To Use Prospect Relay
 Click to Call



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