



MLeads

Mobile App User's Guide

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What is MLeads?

MLeads platform empowers sales and marketing professionals for lead management automation as part of growing opportunities, reducing sales cycles and increase revenue. MLeads also empowers event organizers, meeting planners, networking organizations to have a tool which can help them from the aspects of managing events to provide value-add to attendees, exhibitors and businesses.

MLeads is the next Evolution in leads and events management automation setting the business development and trade show industry standards on fire.

As you know, turning leads into sales is complicated, leads are difficult to capture and organize, follow-ups are difficult and sales cycles are long, ROI is difficult to measure, events are difficult to manage, dependency on support staff is frustrating and so on... These were the drivers behind the need for an innovation for our company's **Founder and CEO Mr. Manish Gorawala** to develop an easy to use and powerful platform MLeads. MLeads is a one-stop comprehensive platform for lead and event management automation.

Why to choose MLeads?

MLeads platform empowers small businesses to have the same tools that big businesses have at much lower cost. We believe in building strong and committed business relationship even after product has been delivered. We give emphasize on client satisfaction and we keep on introducing innovative features for our product to enrich product experience for the clients. Our extensive testing and QA checks ensure that our application runs smoothly on different platforms.

Following problem areas are being solved using MLeads.

1. Lack of Productivity
2. Not having access to information instantly and anywhere without being dependent on support staff
3. Not having the ability to reach out and follow-up leads gathered at events instantly at the once with email message about product or services
4. Not having clear visibility across sales team efforts
5. Not having ability to share personal contact details and video profiles capability to show product and services demo anywhere
6. Not having easy to use process flow to manage presales activities

How is MLeads solving the problem better than the competition?

1. MLeads platform offers simple but powerful presales and event management automation system that allows making your sales and marketing team go mobile
2. Simple easy to follow and intuitive user interface
3. Economical low-cost but powerful feature rich platform compare to competition
4. Offers many innovative features to quickly capture leads information
5. Ability to perform quick follow-ups and lead research capabilities which is unique compare to competition
6. Ability to import/export data from any sources system to any destination systems
7. Offers a complete solution for presales and event management operations and activities from any mobile devices

Key Feature

- Quick captures and organizes leads by events or Groups using any lead retrieval methods (Scan business card, Scan Badge, Scan QR Code, Speak, Bump, Quick Note Lead, Quick Record Lead)
- One-Click research capabilities on lead's background (Linked-In, Google, Website, Facebook, Twitter ...)
- Instant bulk personalized email follow-ups using predefined email message templates in seconds, set drip email schedule, tasks and meetings and more...
- Monitor ROI across sales and marketing team's productivity and efforts in real-time
- Share Personal QR Business card and video profiles instantly with prospects
- Event organizer platform to manage events (Event registration, invite attendees, print badges with QR Codes, Send pre/post event surveys, upload sponsors and event agenda etc.)
- Import and export data from any source system to any destination system
- Run statistical reports - Pipeline and other ROI reports at your fingertips
- WIFI Independent - Capture information in an offline mode and later synchronize back to the cloud platform
- Mobile Access - anywhere, anytime on any devices, convenient cloud platform

How to install MLeads?

Depending on your mobile device, go either to iTunes App Store or Google Play and search for the **MLeads**

To find and install MLeads for iOS:

1. On your iPhone, open **App Store**.
2. Tap the Search icon.
3. Enter “*MLeads*” in the search field.
4. Select **MLeads** in the search results to go to the app page.
5. Follow the standard installation procedure.

The procedure to find and install MLeads app for Android is similar.

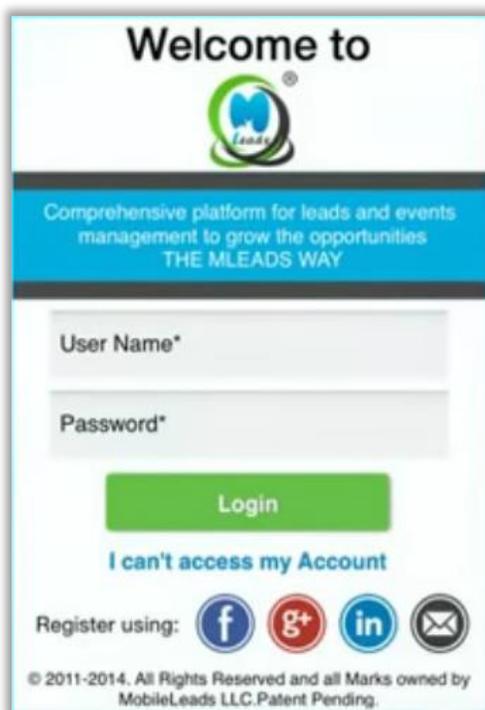
Sign Up/Sign In in to your account

To launch the app, tap the application icon on the home screen of your Android device.

Note: This app requires your device to be connected to the Internet.

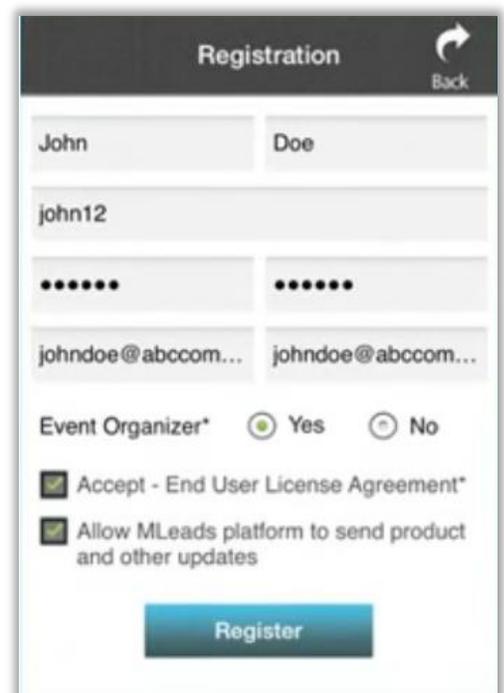
How to Register?

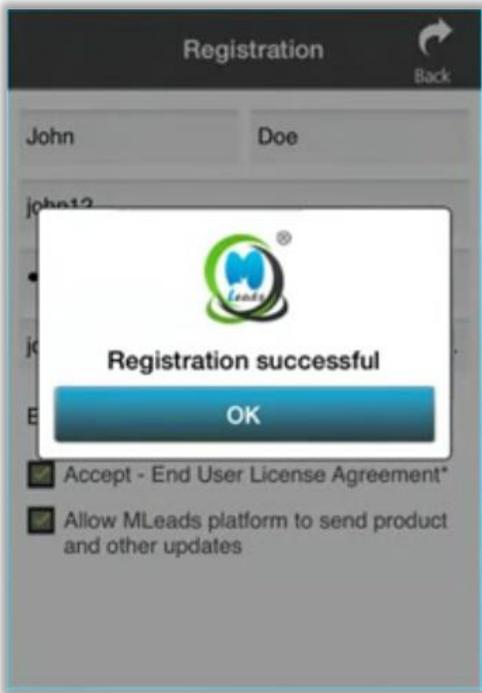
New User:



Click on email icon
to Register

Enter all details require
and click on Register

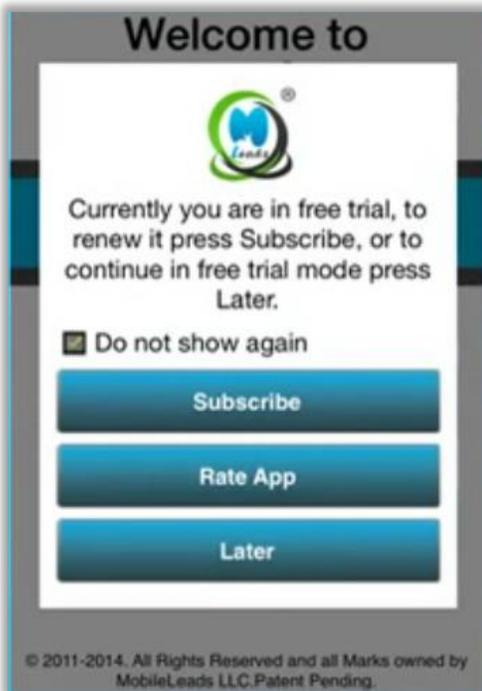
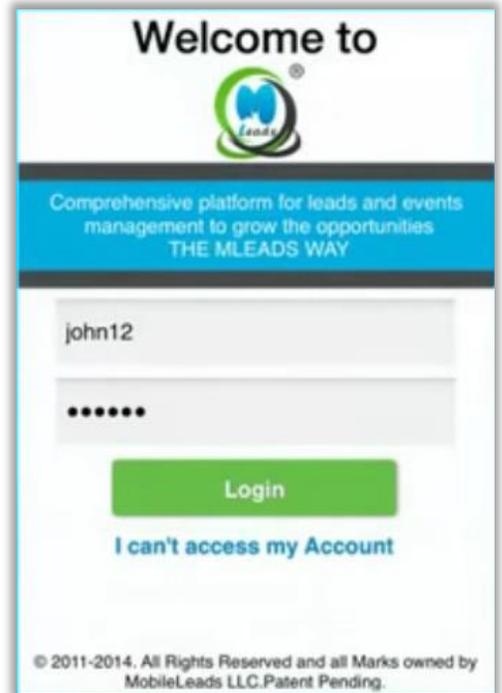




Click on OK

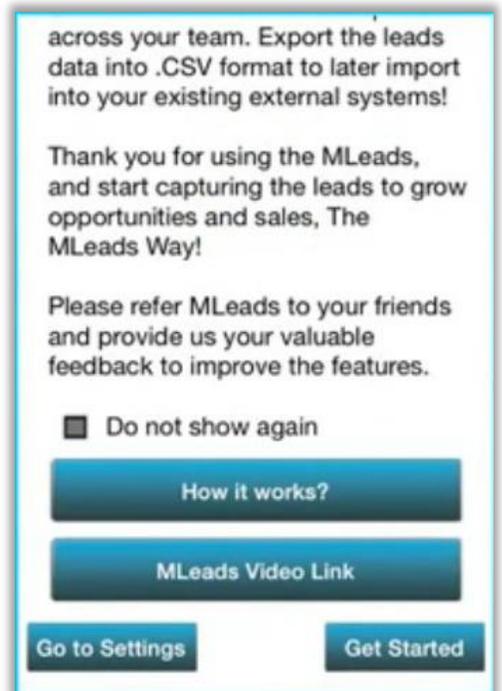
Enter User email id and password

Click on Login



Read Term and condition

Click on Get Started

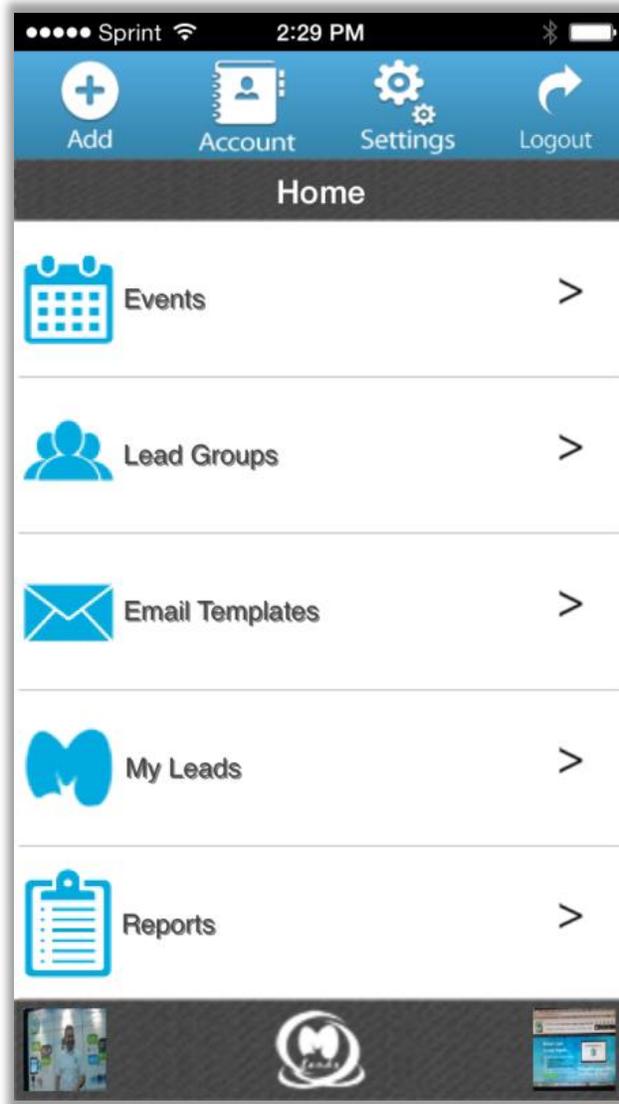


Current User:

- Enter user id and password
- Click on Log in

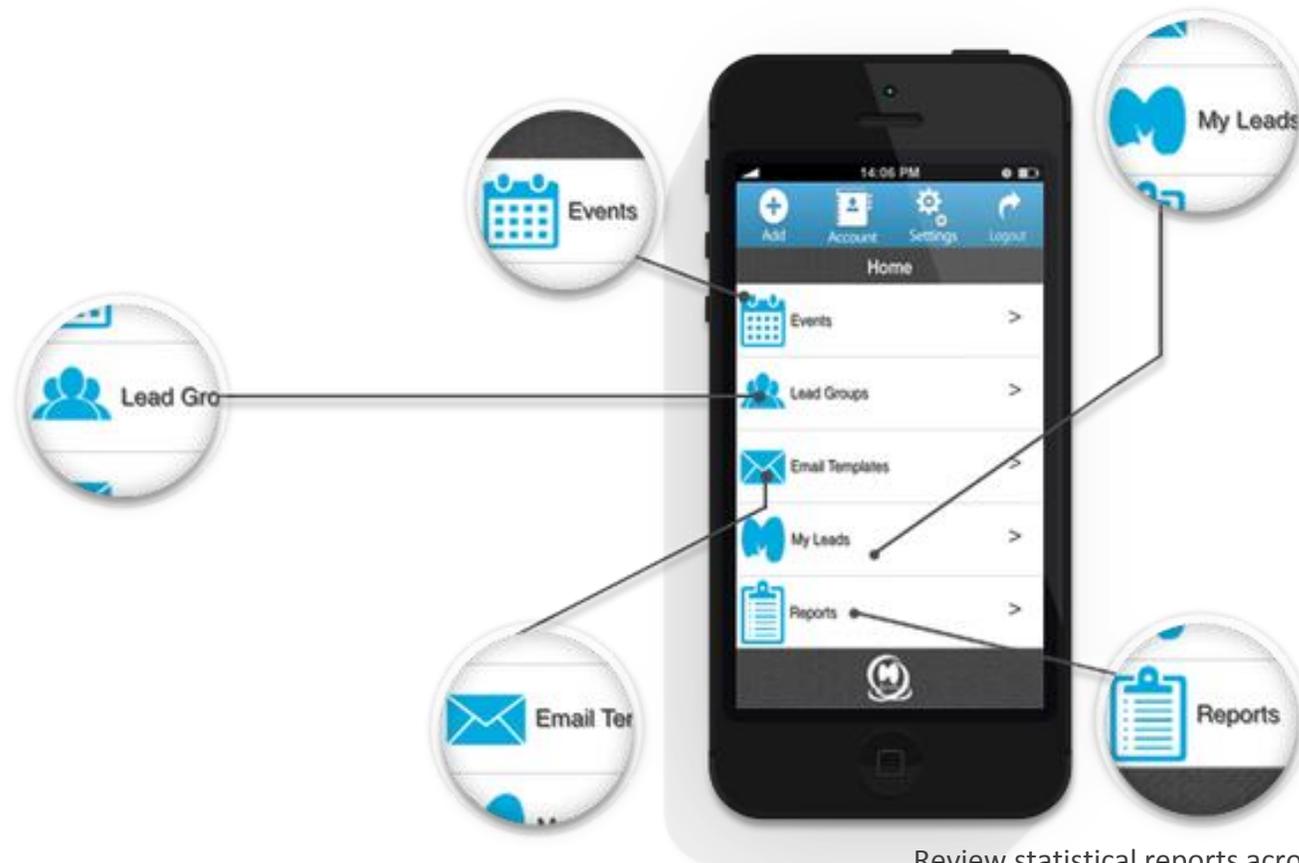
After log in it's ready to access MLeads app in your device.

Note: If you are not able to log in your account then click on '**I can't access my account**' and follow the instructions to reset your password.



Apps overview

Capture Lead information during or after the event using MLeads. MLeads offers 8 quick ways to capture Leads.

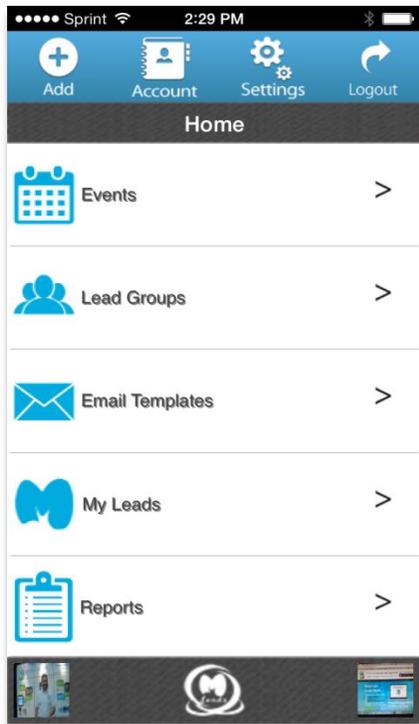


cross your team.
.csv format to
existing external

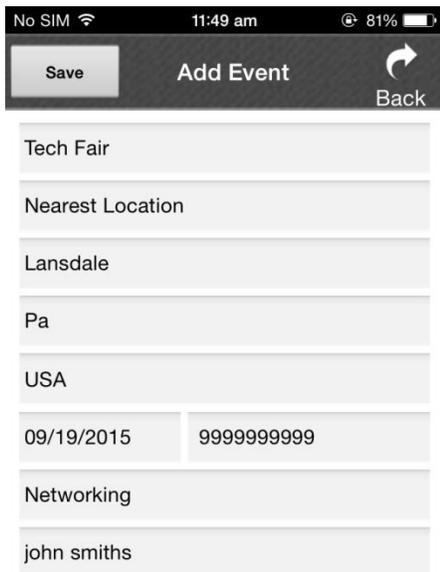
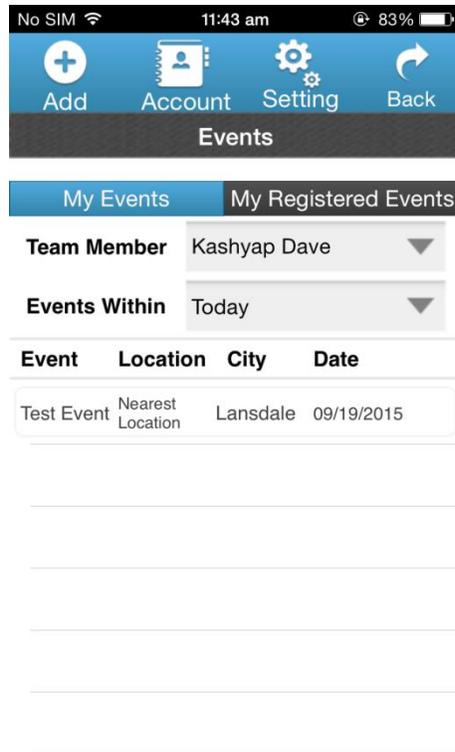
Review statistical reports across your team.
Export the leads data into .csv format to
later import into your existing external
system.

MLeads as Leads Management

Create Event or Group



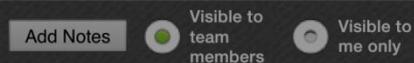
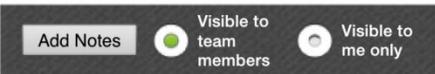
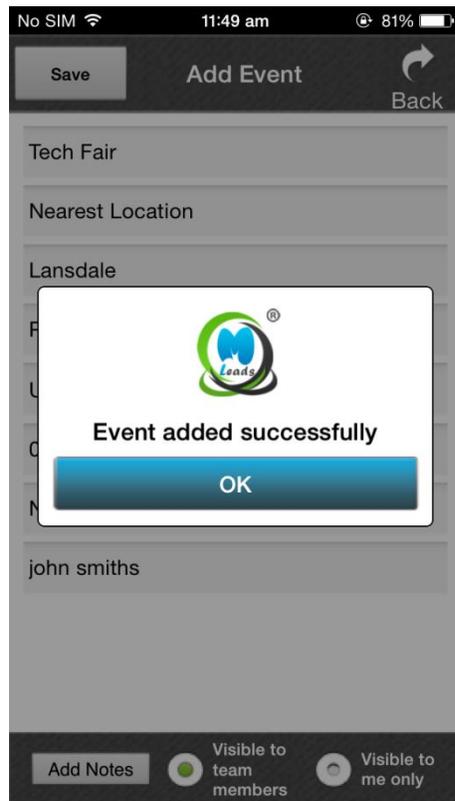
Click on event option on home screen



Here user can "Add Note" for event
Also user can select Visibility to your team member or not

Click on Save

Event Add Successfully

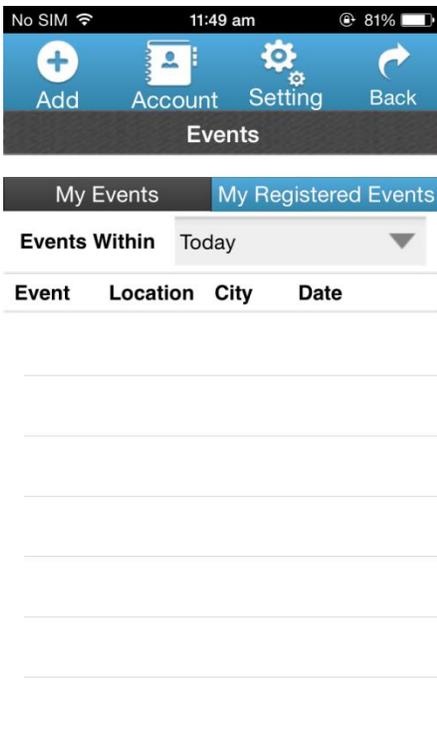
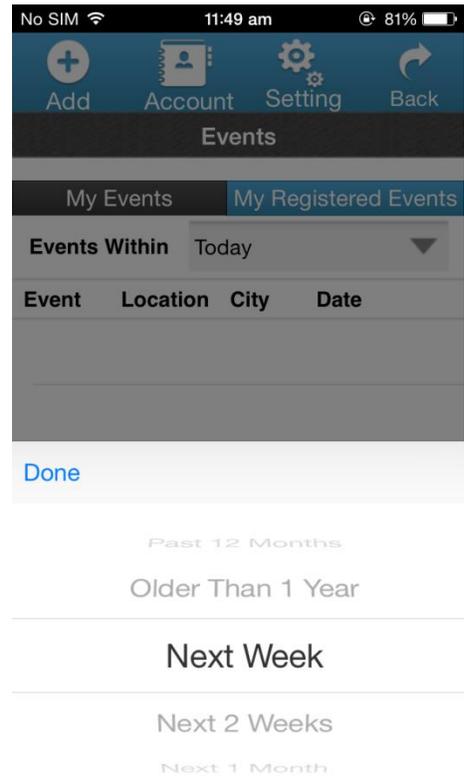




User can see list view on Event

User can click on the event to view event options

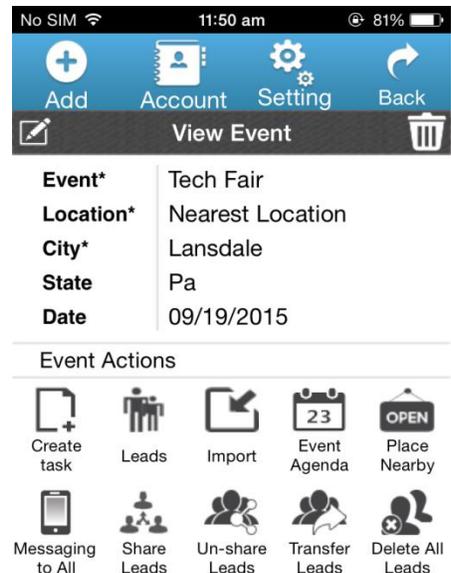
User can see upcoming or past event of team member.



User can access various feature

User can edit and delete event

- Create Task
- View Leads
- Import your leads
- Upload event Agenda
- Send messaging to all Leads
- Share and un-share your leads with Team Member
- Transfer your leads
- You can delete your leads

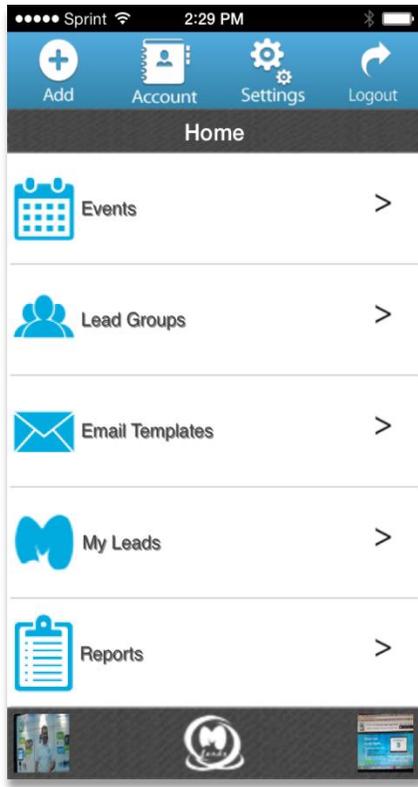


Event* Tech Fair
 Location* Nearest Location
 City* Lansdale
 State Pa
 Date 09/19/2015



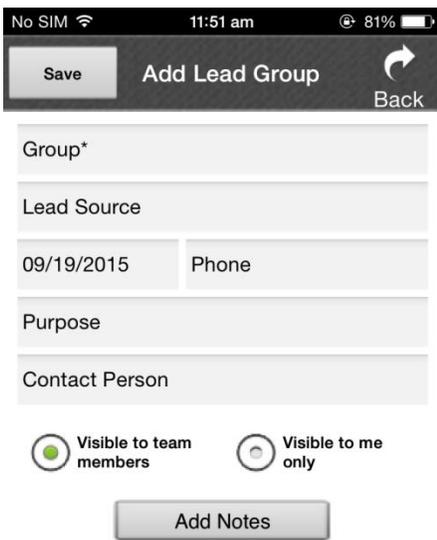
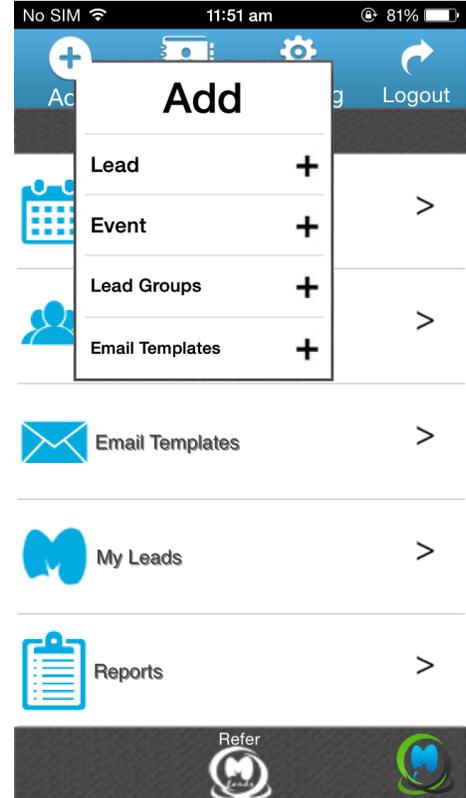
- Event Actions
- Create task
 - Leads
 - Import
 - Event Agenda
 - Place Nearby
 - Messaging to All
 - Share Leads
 - Un-share Leads
 - Transfer Leads
 - Delete All Leads

Add Leads Group



On Home screen click on Lead Groups

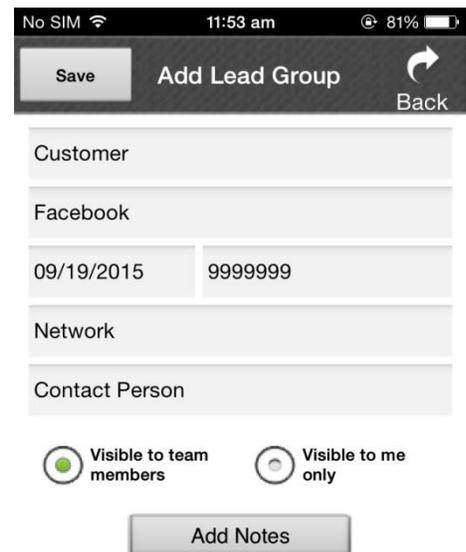
Click on Add

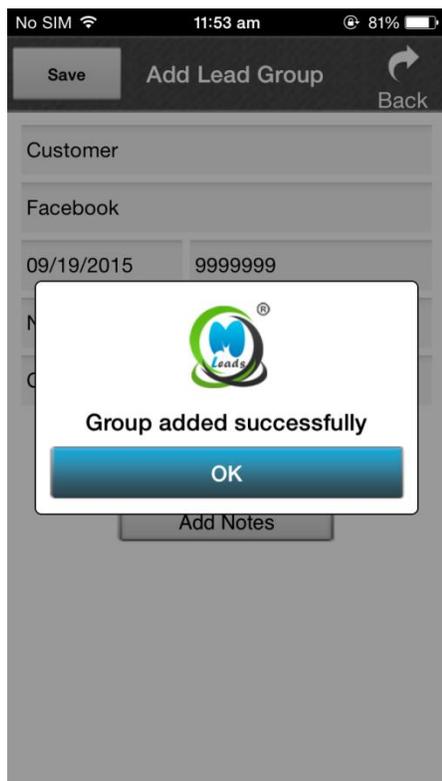


Enter Require information

- Group Name
- Leads Source
- Date
- Phone no
- Purpose
- Contact person

Here User can "Add Note" for your event
Also user can select Visibility to your team member or not





Click on save

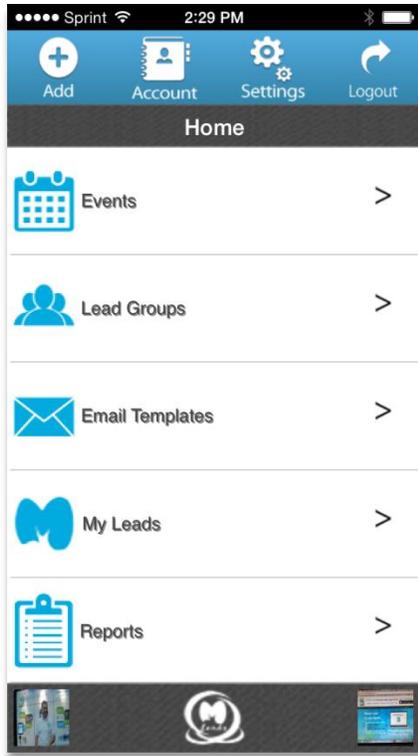
Click on the Newly created Lead Group to use other option

User can edit and delete Leads Group by clicking the icon

- Create Task
- View Leads
- Import your leads
- Send messaging to all Leads
- Share and un-share your leads with Team Member
- Transfer your leads
- You can delete your leads

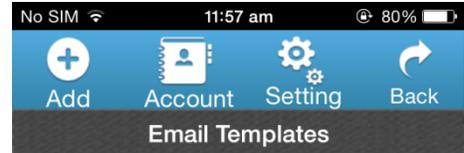


Add Email Template

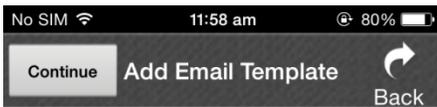


Click on the Email templates option on the Home Screen

Click on the Add button on the left corner



Subject	Message
APPLICABLE TO ALL EVENTS AND GROUPS	
triforce new	Connect with us...
triforce new	Connect with us...
triforce new	Connect with us...
MLeads Aut...	Get social with u...
triforce nice	Get social with u...
Triforce mon...	Come to join us...



Enter Subject and click on Continue

Event or Group: Tech Fair

Subject*

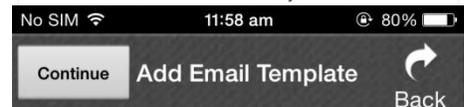
We recommend that you create / update email message template from our website myleadssite.com using your computer

Insert pre-define line text while sending email message

Add Attachments

We will personalize your email by adding 'Hi First Name', at the start of the message. 'Email Signature' at the end of the body(if configured in my profile page)

Message*



Subject*

We recommend that you create / update email message template from our website myleadssite.com using your computer

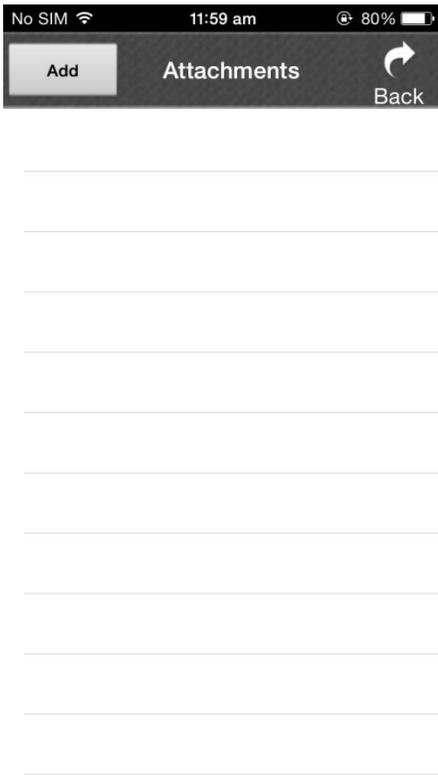
Insert pre-define line text while sending email message

Add Attachments

We will personalize your email by adding 'Hi First Name', at the start of the message. 'Email Signature' at the end of the body(if configured in my profile page)

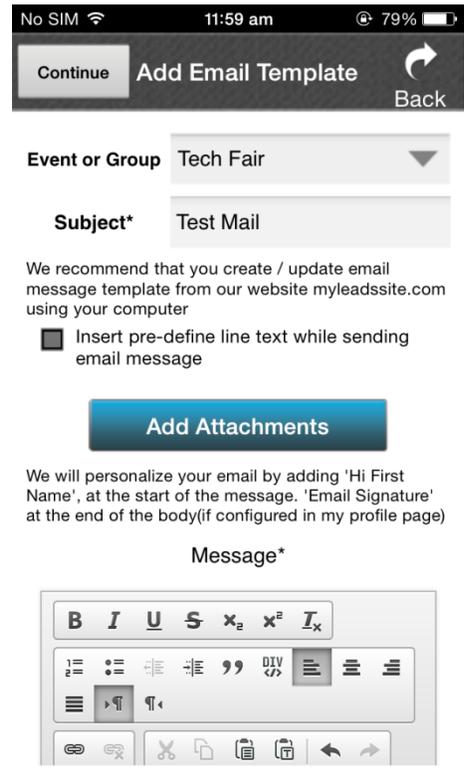
Message*





User can Attach your document, files, pdf, photos in the mail

Here user can Insert Pre-define line text while sending email message



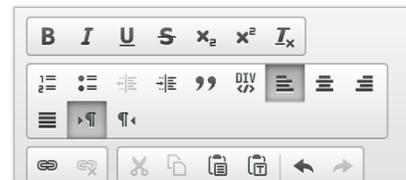
We recommend that you create / update email message template from our website myleadssite.com using your computer

Insert pre-define line text while sending email message

Add Attachments

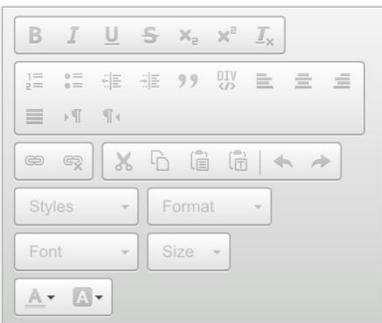
We will personalize your email by adding 'Hi First Name', at the start of the message. 'Email Signature' at the end of the body(if configured in my profile page)

Message*



Subject: Test Mail

Message



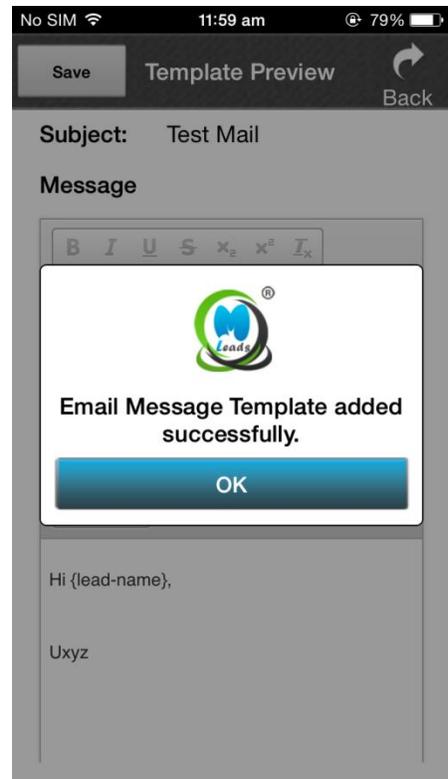
Hi {lead-name},

Uxyz

Write email body

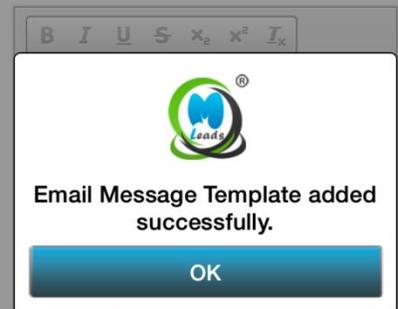
Click on save

Click on ok



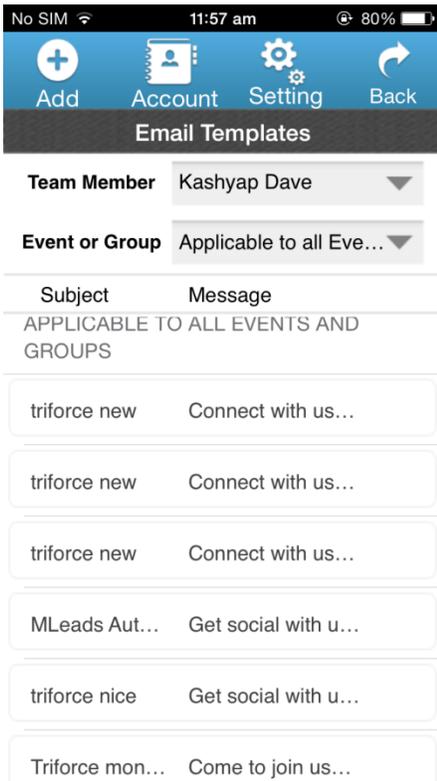
Subject: Test Mail

Message

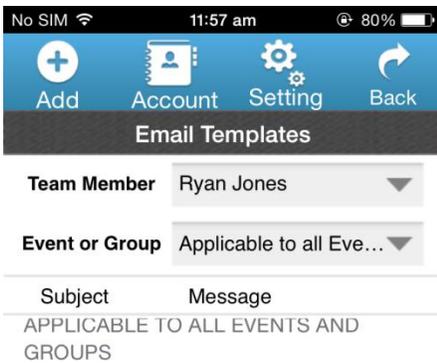
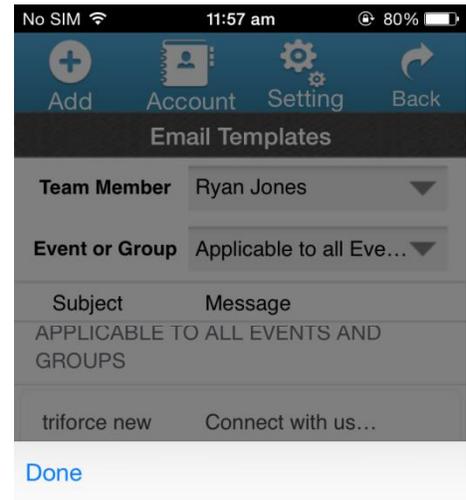


Hi {lead-name},

Uxyz

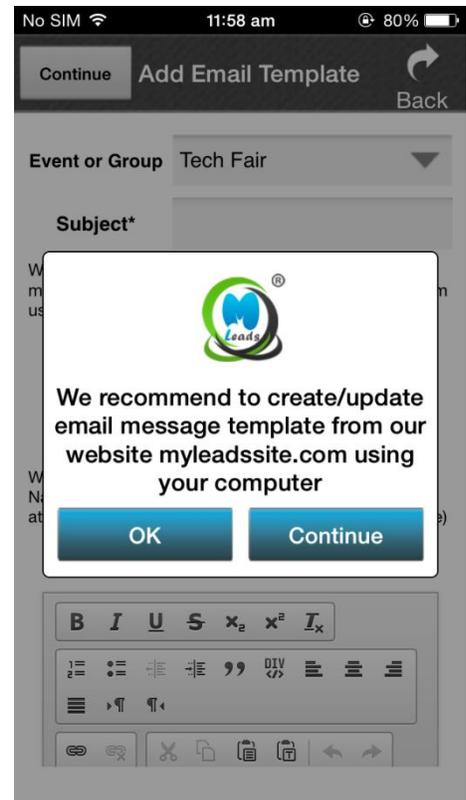


Here User can see list of email template, also user can see Team Member's predefine Template



Here we recommend to create/ update email message template from our website myleadssite.com using your computer

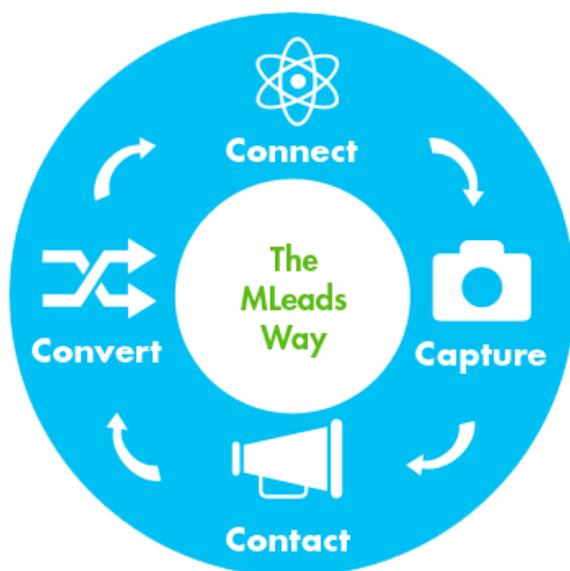
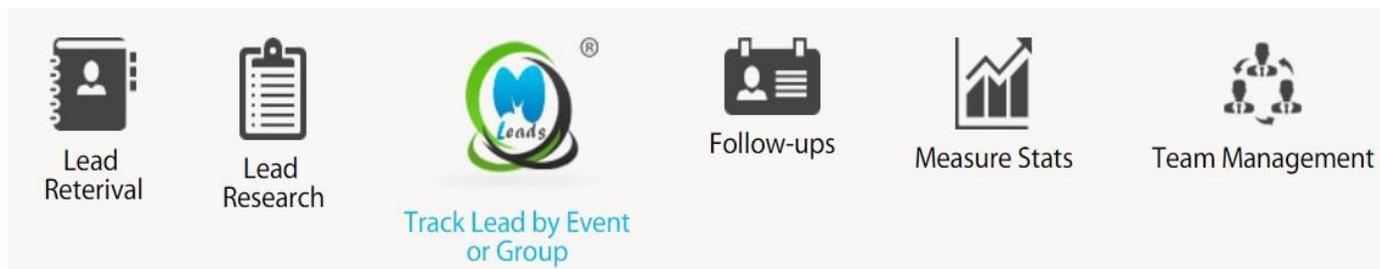
Note : User can create beautiful Email templates by using MLeads Website because we provide more extra feature on our web platform



MLeads Stream Lines Lead Management

MLeads is the only platform that refines the lead management process. It will make your sales and marketing teams more productive and efficient.

Grow your business fast and in a smart way!



Connect and capture

Whatever works best for you to capture leads information quickly and easily, MLeads platform provides you the unique lead retrieval options.

Perform Lead Research

Make informed follow-ups by doing one-touch lead research on Linked-In, Google, Company website, Google Maps. MLeads bring productivity and efficiency for any companies, we guarantee it.

Contact Follow-ups

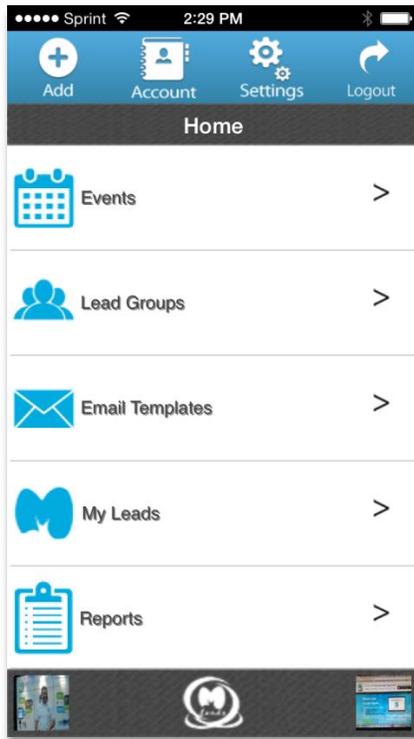
Send mass personalized email, make a call, setup meeting, setup tasks, send text message etc. Use

MLeads for presales and marketing automation, front-end to any CRM or use it as CRM system. Prospects to profits, The MLeads way in seconds!

ROI & Stats

Measure and manage ROI across your sales and marketing team at your fingertips, anywhere anytime. Measure ROI on your business development activities instantly!

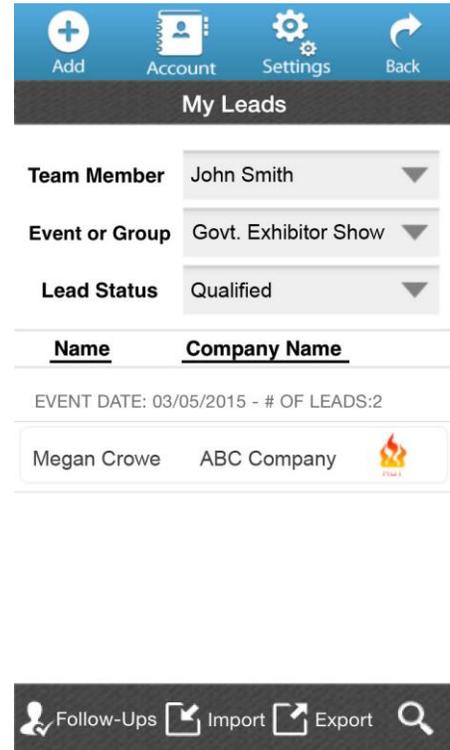
Add Leads



Click on the My Leads option on the Home Screen

Here user can import and export leads and also user can take follow-ups of leads,

User can also filter out leads by selecting different Team member, event or group and Leads Status



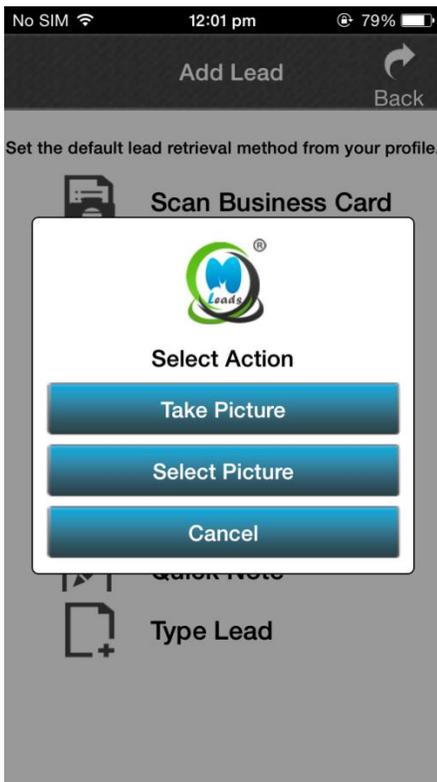
Set the default lead retrieval method from your profile.

-  Scan Business Card
-  Scan the Badge
-  Speak
-  Scan QR Code
-  Bump Lead
-  Quick Record
-  Quick Note
-  Type Lead

Quick captures and organizes leads by events or Groups using any lead retrieval methods

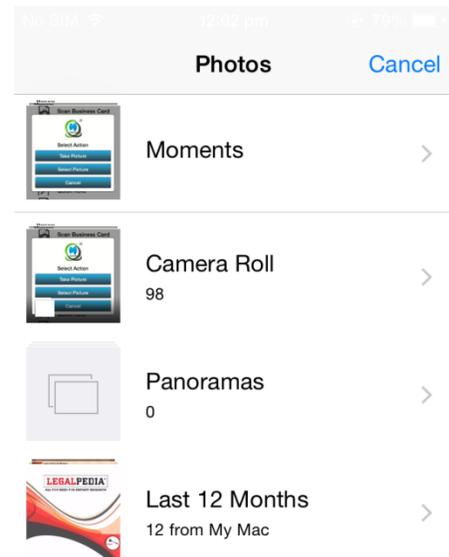
Leads Retrieval Methods

Method-1 Scan Business Card



Click on Scan Business Card

User have to select option take photo of business card or select picture from device



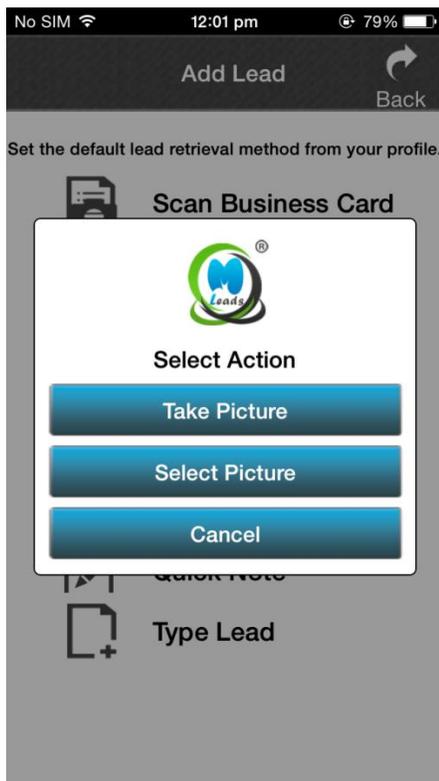
Tips to achieve best card recognition result:

- Take a picture of a visiting card as clearly as possible. (Using anti-shake and placing cards in good lighting condition)
- Take a picture of a visiting card as big as possible. (Aligning business card edges to viewfinder edges as closely as possible)
- Be sure to position the mobile on the top of the visiting card at parallel level.



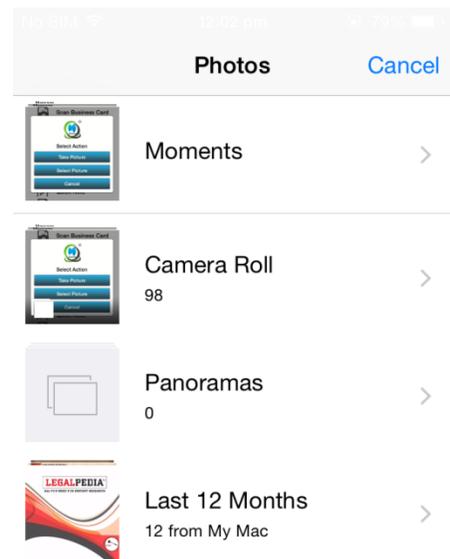
Save		Add Lead		Back
Event or Group	Import Address Book			
Capture Image				
JOHN	SMITH			
EXECUTIVE DIRECTOR				
Company				
johnsmith@smith.com				
Other Email				
01234 567890	Phone Extension			
Other Phone				
Lead Status	Other			

Method-2 Scan the Badges



Click on Scan the Badge

User have to select option take photo of Badge or select picture from device



Tips to achieve best recognition result:

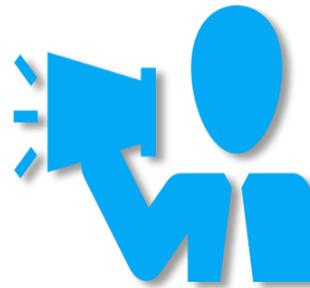
- Take a picture of a Badge as clearly as possible. (Using anti-shake and placing cards in good lighting condition)
- Take a picture of a Badge as big as possible. (Aligning code edges to viewfinder edges as closely as possible)
- Be sure to position the mobile on the top of the Badge at parallel level.



Method-3 Speak Leads

Click on Add Speak Leads

- Step-1 Click on speaker icon then one speech recognized pop will open
- Step-2 Now User have to speak First Name For Example "John"
- Step-3 Click on ok
- Step-4 Like this you to speak Last Name, email id, phone no.



Notes:

- Application Support only spoken English
- Speak clearly
- Avoid noisy environments
- Use a close-talk microphone for best speech recognition results
- Properly position your microphone to achieve the best speech recognition results. For a close-talk microphone

The screenshot shows a mobile application interface titled "Add Speak Lead". At the top, the status bar displays "No SIM", "12:07 pm", and "77%". The app header includes the title "Add Speak Lead" and a "Back" button with a right-pointing arrow. Below the header, a message reads "Please note application supports only spok...". The form contains three input fields, each with a speaker icon to its left:

- First Name:** The input field contains the text "JohnSmith".
- Email Prefix:** The input field contains the text "John".
- Domain:** The input field contains the text "@ gmail.com".
- Phone Number:** The input field contains the text "9923494905".

At the bottom of the form, there are two buttons: "Cancel" and "Save". Below the buttons, another message reads "Please note application supports only spoken English".

Method-4 Scan QR code

Click on Scan QR Code

It will be open camera of your device and scan QR Code and you will get message Add Lead Successfully

Tips to achieve best recognition result:

- Take a picture of a QR Code as clearly as possible. (Using anti-shake and placing cards in good lighting condition)
- Take a picture of a QR Code as big as possible. (Aligning QR Code edges to viewfinder edges as closely as possible)
- Be sure to position the mobile on the top of the QR Code at parallel level.



Method-5 Bump Leads



Method-6 Quick Note

Click on Quick Note

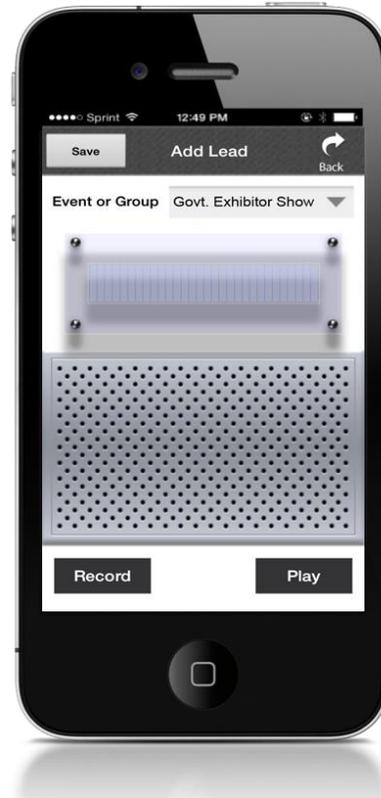
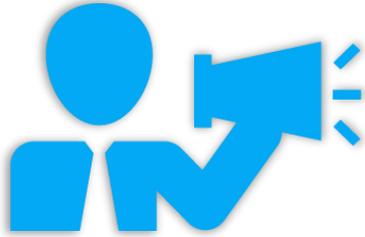
- User can write Quick note about leads
- No need to type simply writes on screen
- You can use various Functions like Brush Size, color, Eraser, Clear your note.



Method-7 Quick Record

Click on Quick Record

- Start to speak and after completing click on save

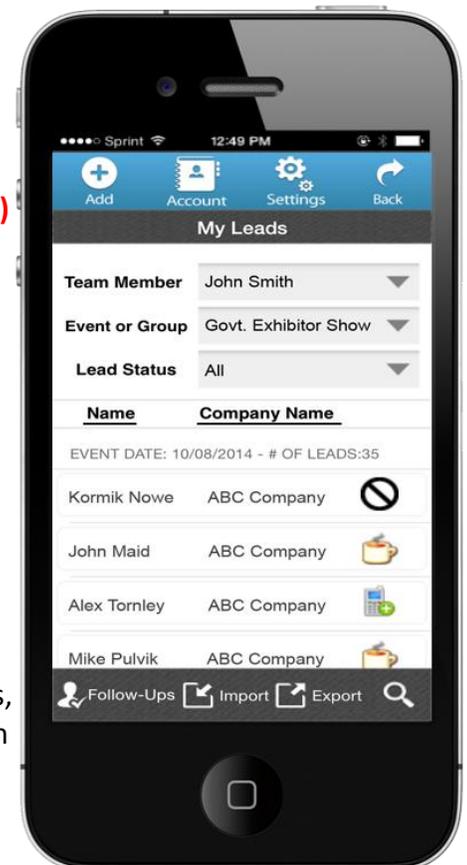


Method-8 Add Leads Manually

- Click on Type Leads:
- Here User can add Leads Manually
- You have to Type Each and every require filed

Fields:

- **First Name (Must be require fields)**
- Last Name
- Job Title
- Company
- **Email id (Must be require fields)**
- Other email id
- Phone no.
- Extension
- Leads Status
- Follow-up Action
- Take action by date:
- Product Interested By
- Notes, Address, sales opportunities, Attachment, Voice Memo, User can save picture ETC



Leads Research

MLeads provide another unique and powerful feature Lead Research

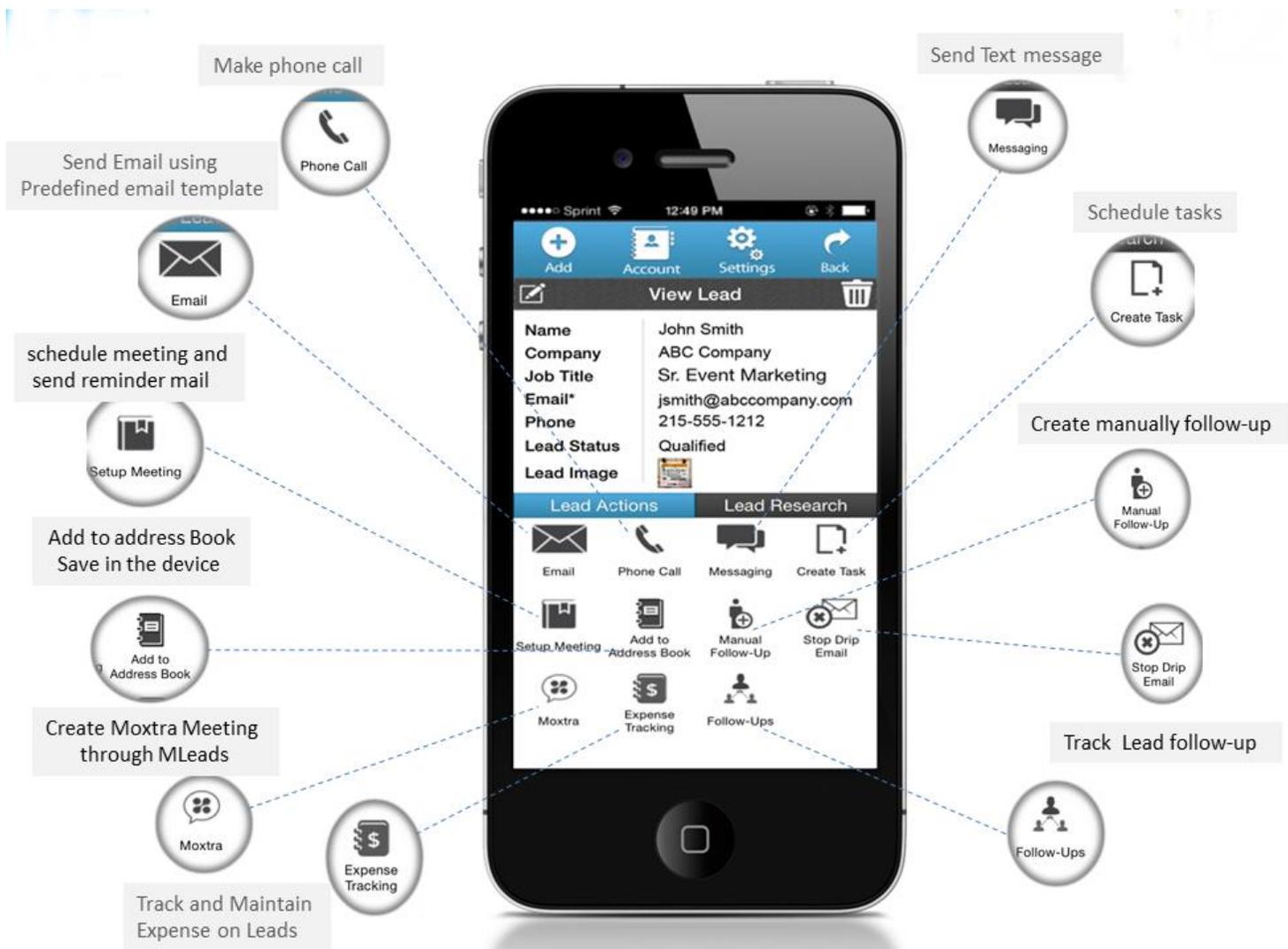
Here User can search about the Leads on

- Linked-In
- Website
- Maps
- Google Search
- Facebook and Twitter



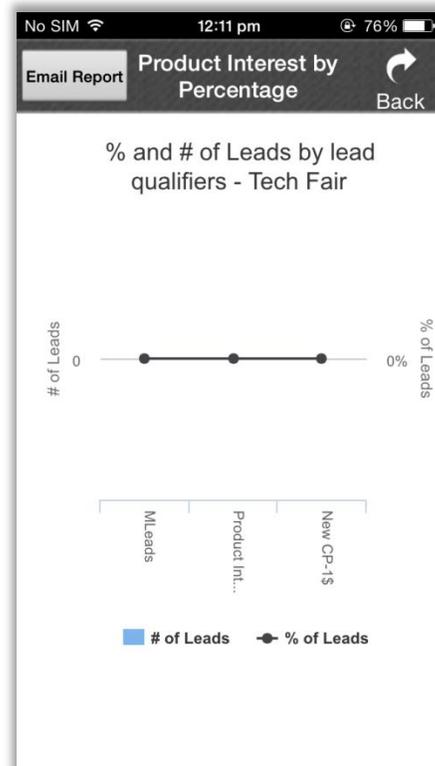
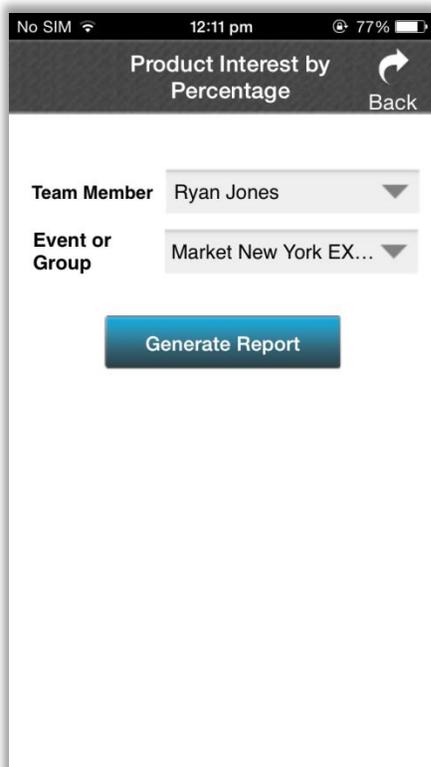
Lead Actions

Instant bulk personalized email follow-ups using predefined email message templates in seconds, set drip email schedule, tasks and meetings and more



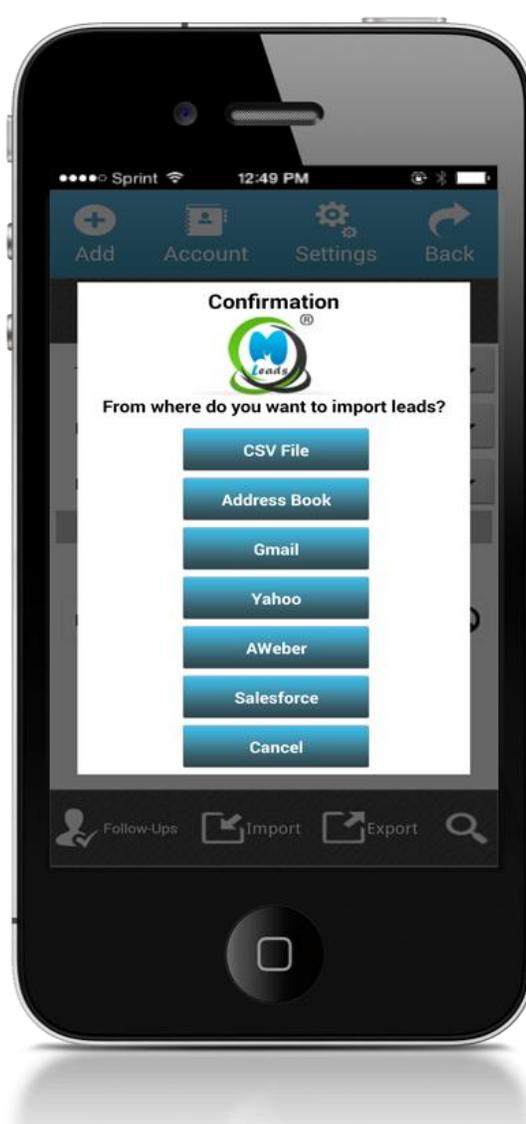
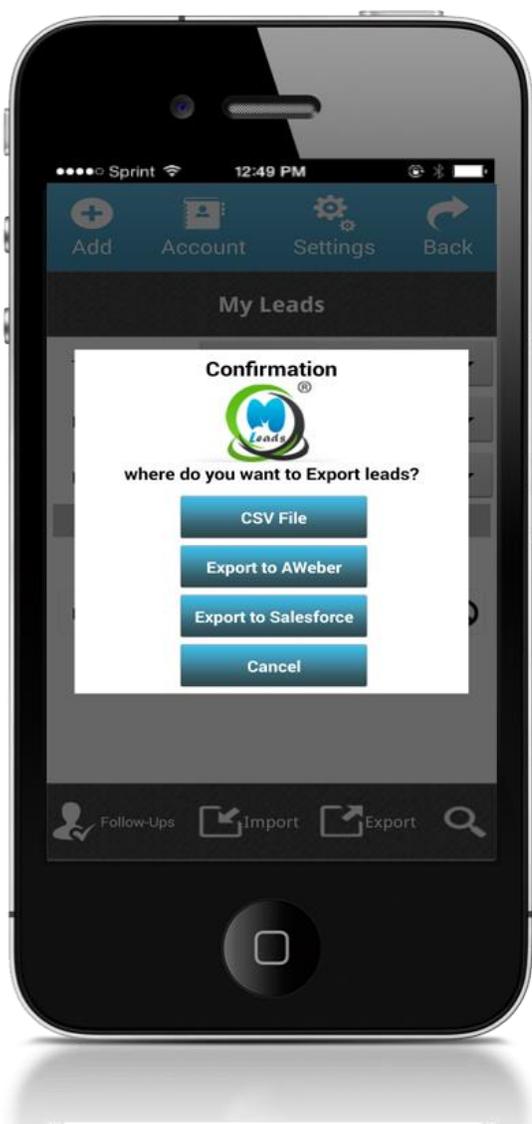
Measure Statistics

- Measure ROI, ROO, and visibility into productivity across team
- Pipeline Report
- Statistical Reports
- Sales Cycle Report



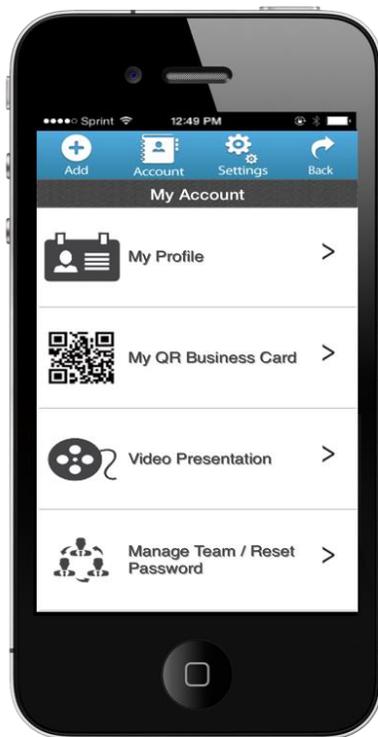
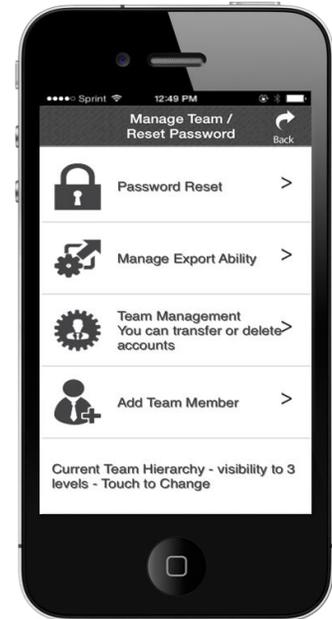
Import & Export Data

- Export your Leads in different format excel
- Export to Aweber and salesforce
- Import your Leads from different source system
- From excel file, Gmail, Yahoo, Aweber, Salesforce etc.



Team Management

- As Team Leader User can manage team
- User can check productivity of team member
- User can Reset Account password
- Team management User can delete and transfer your team member
- User can Manage Export Ability



My Account

- My Profile – You can Add your person information like First name, Last name , Email id , company name ,phone no and many more
- My QR Business card – MLeads create QR code so you send mail QR code or you can attach with your mail
- Video Presentation- you can send video links to your leads, which is Prerecorded Video of your service or product
- Manage Team and set password and many more feature



Mange Leads from Web Platform

- Open <http://www.myleadssite.com/>
- Click on login and Enter User id and Password
- If you are new user then click on sign up

If you are not able to login then click on [Can't Access Account?](#)

CALL US at +1 (267)-263-3178

WELCOME BACK!

Enter Email

Enter Password

Login

[Can't Access Account?](#)

OR

Don't have MLeads account yet?

Sign Up

After Login system will show the Dashboard,

- Dashboard will be visible for your account,
- Dashboard will show various statistical reports and data related to your leads and events

My Dashboard
Event Name: MLeads-Users' training

[Click Here for Pipeline Report](#)

[Click Here for Sales Cycle Report](#) | [Click Here for Converted Lead to Customer](#)

[Click Here for Sales Report](#) | [Click Here for Pipeline Sales Report](#)

% and # of Leads by lead qualifiers

Lead Qualifier	Percentage
Other	100
Cold	0
Contacted	0
Contact in future	0
Hot	0
Not contacted	0
Qualified	0
Warm	0
Convert to customer	0
Current customer	0
Target lead	0

[Click Here for more report](#)

Product Interest by Percentage

Product Interest	Percentage
Product Int...	0

[Click Here for more report](#)

of clicks for Sponsors logos

Sponsor	Clicks
No sponsor	0

[Click Here for more report](#)

of Leads by attendees

Attendee	Leads
Other	0
Target lead	0
Cold	0
Warm	0
Hot	0
Qualified	0
Contacted	0
Not contacted	0
Contact in future	0
Convert to customer	0
Current customer	0

[Click Here for more report](#)

Logout

[Press](#) | [Support](#) | [Blog](#) | [Contact Us](#) | [FAQ](#) | [Terms, Conditions and Privacy Policy](#) | [Site Map](#)

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User can see different Menu options by clicking on 'Menu' Tab on the Top and will have to access to features to access events, lead groups, leads, email statistics etc.

Main Menu

- Dashboard
- Events
- Lead Groups
- My Leads
- Email Templates
- Email Statistics
- Event Management
- Settings
- Subscription
- Team Management
- Product Qualifiers
- Follow-up Actions
- Lead Qualifiers

My Dashboard
Event Name: MLeads-Users' training

[Click Here for Pipeline Report](#)

[Click Here for Sales Cycle Report](#) | [Click Here for Converted Lead to Customer](#)

[Click Here for Sales Report](#) | [Click Here for Pipeline Sales Report](#)

% and # of Leads by lead qualifiers

Lead Qualifier	Percentage
Other	100
Cold	0
Contacted	0
Contact in future	0
Hot	0
Not contacted	0
Qualified	0
Warm	0
Convert to customer	0
Current customer	0
Target lead	0

[Click Here for more report](#)

Product Interest by Percentage

Product Interest	Percentage
Product Int...	0

[Click Here for more report](#)

Online Chat

Event

- Here User can View List of up coming event and past events.
- User can Create new event by clicking on Add icon
- User can access variouse features to operate on the events related data
- User can Add, Edit, View, Delete, Shedule Task , import the Leads, Search Near by Location m Upload Sponser and event agenda

Event Name	Location	Event Start Date	Event End Date
MLeads-Users' training	Online	12/10/2015	12/10/2015
MLeads platform online demo	Online	12/08/2015	12/08/2015
Is your sales and marketing team still tied to their desktops?	Online	12/01/2015	12/01/2015
Redefining Event management and collaboration	Online	11/19/2015	11/19/2015
MLeads Seminar - Prospect to Profits - Registered Attendees		02/19/2014	02/19/2014

Lead Group

- ✓ Users can also track Leads by group
- ✓ Users can Create Lead Group, Edit view and delete
- ✓ User can import Leads from various source like Excel .CSV, Salesforce, Gmail, Aweber etc.

Lead Group Name	Lead Source	Date of Group Creation
Sign up for webinar	Online	07/09/2015
Email campaign for Tuesday webinar		07/09/2015
Test	test	07/09/2015

Add Lead Group

Notes

Add Leads Group

Scheduled Task

User can schedule task and they can add Start date, End date, Duration of task, Priority of the task

[Menu](#)
[Contact Us](#)
[Support](#)
Hi MLeads, Welcome to MLeads

Lead Group Tasks - Sign up for webinar

Team Member:

Lead Group:

Duration:

Status:

Subject	Start Date	End Date	Status	Priority
No records Found.				

Lead Management

Lead management is the ability to capture, respond, and manage incoming leads. When spending so much time and money on creating the perfect campaign, you want to make sure you have numerous best practices in place to manage your leads throughout the entire life-cycle. Unfortunately, many marketers don't employ clearly defined lead management practices. And when you don't have processes in place, you risk reduced ROI, weak sales funnel, and poor relationships with leads and customers.

But done right, lead management creates more educated buyers, helps you better understand their needs, and ultimately means more revenue.

Mange You're Leads

- Click on Menu and then click on My Leads
- System will show List of your Leads
- Here you can perform various Management Tools by Selecting Lead
- One-Click research capabilities on lead's background (Linked-In, Twitter, Google, Website)

The screenshot displays the MLeads software interface. At the top, there is a navigation menu with options like 'Menu', 'Contact Us', and 'Support'. Below the menu is a toolbar containing various icons for actions such as 'Add', 'Edit', 'View', 'Trash', 'Import', 'Export', 'Email', 'Stop Drip', 'Follow ups', 'Task', 'Meeting', 'Sales Opportunities', 'Website', 'LinkedIn', 'G-Search', 'Twitter', 'Facebook', 'Moxtra', and 'Expense Tracking'. The main content area shows a filter section with dropdown menus for 'Team Member' (MLeads Support Team), 'Event/Lead Group' (MLeads-Users' training), and 'Status' (--All--). A search filter is set to 'First Name, Last Name, Company, Email'. Below the filters, the title 'My Leads' is displayed, followed by a pagination control showing 'First', '<Previous', '1', '2', '3', '4', '5', '6', '7', '8', '9', '10', 'Next>', and 'Last'. The main table lists leads for the event 'Event Name: MLeads-Users' training (12/10/2015) - No of Leads : 179'. The table has five columns: 'Company', 'First name', 'Last name', 'Voice Memo', and 'Card Image'. The first few rows of data are as follows:

	Company	First name	Last name	Voice Memo	Card Image
<input type="checkbox"/>	Action Coach Business Consulting	Tony	Servidio	N/A	N/A
<input type="checkbox"/>	Action Coach Business Consulting	Eve	Fabros	N/A	N/A
<input type="checkbox"/>	Action Coach Business Consulting	Ailina	Calip	N/A	N/A
<input type="checkbox"/>	affinityplan	Bob	Allen	N/A	N/A
<input type="checkbox"/>	affinityplan	Dewitt	Smith	N/A	N/A
<input type="checkbox"/>	affinityplan	Clara	Hansen	N/A	N/A
<input type="checkbox"/>	Ajaxunion	Zevi	Friedman	N/A	N/A
<input type="checkbox"/>	Ajaxunion	Joe	Apfelbaum	N/A	N/A

At the bottom of the table, there is another pagination control with the same structure as the one above.

Add Lead

Manually assigning new leads to specific individuals (owners) can be tedious. MLeads allows you to create a workflow rule to assign new leads to salespeople based on specific criteria, such as Lead Group, Event, activity, etc.

Add Lead

<div style="margin-bottom: 5px;">MLeads-Users' training ▼</div> <div style="margin-bottom: 5px;">First Name* <input type="text"/></div> <div style="margin-bottom: 5px;">Last Name <input type="text"/></div> <div style="margin-bottom: 5px;">Company <input type="text"/></div> <div style="margin-bottom: 5px;">Job Title <input type="text"/></div> <div style="margin-bottom: 5px;">Email* <input type="text"/></div> <div style="margin-bottom: 5px;">Other Email <input type="text"/></div> <div style="margin-bottom: 5px;">Phone <input type="text"/></div> <div style="margin-bottom: 5px;">Phone Extension <input type="text"/></div> <div style="margin-bottom: 5px;">Other Phone <input type="text"/></div>	<div style="margin-bottom: 5px;">Street <input type="text"/></div> <div style="margin-bottom: 5px;">City <input type="text"/></div> <div style="margin-bottom: 5px;">State <input type="text"/></div> <div style="margin-bottom: 5px;">Country <input type="text"/></div> <div style="margin-bottom: 5px;">Zipcode <input type="text"/></div> <div style="margin-bottom: 5px;">Lead Status Other ▼</div> <div style="margin-bottom: 5px;">Follow-Up Action ▼</div> <div style="margin-bottom: 5px;">Action Taken By Date <input type="text"/></div> <div style="margin-bottom: 5px;">Product Interest ▼</div>
--	---

Attachment No file chosen

Sales Opportunity

Sales Opportunity Name

Target \$

--Select Periods-- ▼

Target \$ Future

Target Closing Date

--Probability Of Closing-- ▼

RFP Due Date

Add

Back

User can filter leads by selecting Event and Leads Group

Menu Contact Us Support Hi MLeads, Welcome to MLeads

Team Member:

MLeads Support Team ▼

Event/Lead Group:

MLeads-Users' training ▼

Status:

--All-- ▼

Filter By Lead:

First Name, Last Name, Company, Email

Event List

MLeads-Users' training

MLeads platform online demo

Is your sales and marketing team still tied to their desktops?

Redefining Event management and collaboration

MLeads Seminar - Prospect to Profits - Registered Attendees

Lead Group List

Sign up for webinar

Email campaign for Tuesday webinar

Test

First «Previous 1 2 3 4 5 6 7 8 9 10 Next» Last

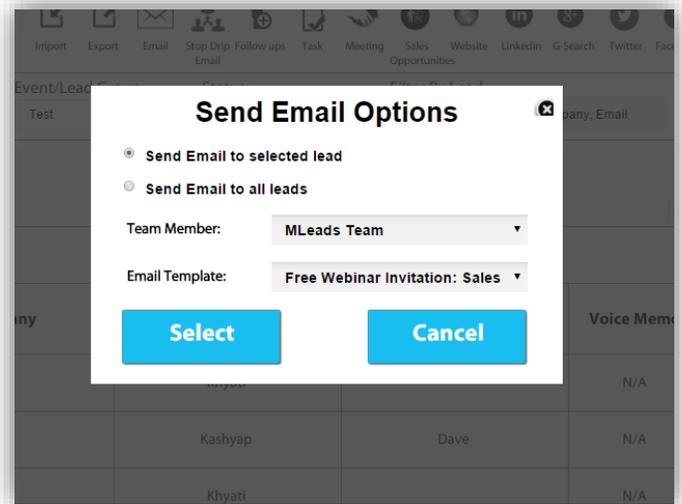
10/2015) - No of Leads : 179

	Company	First name	Last name	Voice Memo	Card Image
<input type="checkbox"/>	Action Coach Business Consulting	Brad	Sugars	N/A	N/A
<input type="checkbox"/>	Action Coach Business Consulting	Vic	Ciuffetelli	N/A	N/A
<input type="checkbox"/>	Action Coach Business Consulting	Tony	Servidio	N/A	N/A
<input type="checkbox"/>	Action Coach Business Consulting	Eve	Fabros	N/A	N/A

Send Email to Leads

Instant bulk personalized email follow-ups using predefined email message templates in seconds, set drip email schedule.

- Select Lead and click on Email
- Select pre-define Template
- Choose option send mail to all leads or only to selected Lead
- User can modify or add email message body text
- Click on Send



Send Email

To: gajipara_khyati@yahoo.com

CC:

[Note: Enter Comma Separated Email Addresses]

Subject * **Free Webinar Invitation: Sales and Marketing /**

We will personalize your email by adding 'Hi First Name,' at the start of the message.
 'Email Signature' at the end of the body(if configured in my profile page).

Message *
 File Edit Insert View Format Table Tools
 Undo Redo Bold Italic Text Color Background Color Link Image Font Size Font Color
 Hi Khyati,

 Come to join us
 Login | Registration

Send
Back

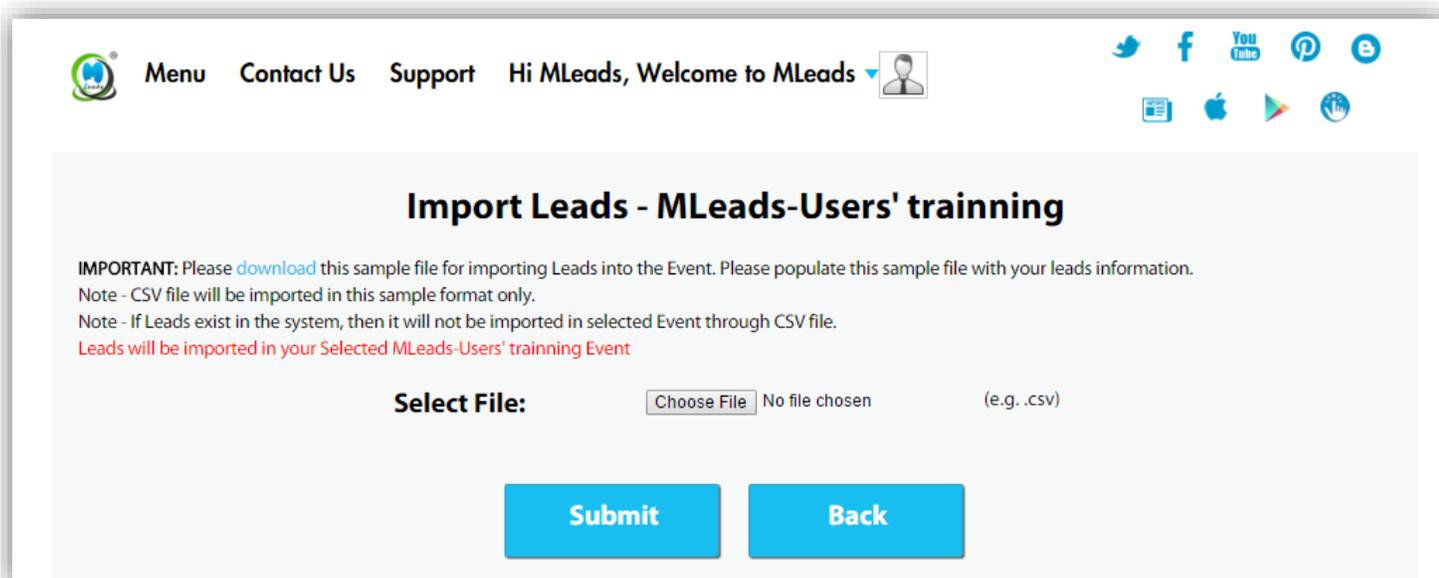
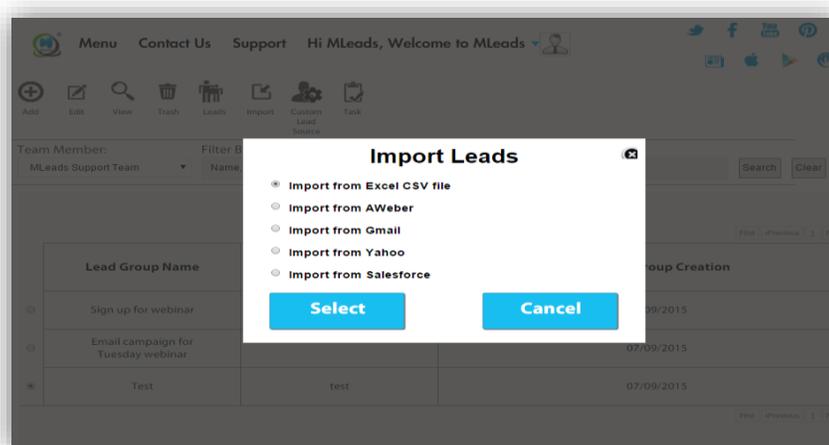
Import Leads

Importing records from external sources to MLeads is one of the most important lead creation activities for marketing and sales. In MLeads, importing records help you to create new leads by gathering data through various sources, such as purchasing a record database, records from different business units, etc. You can import records.

- Choose Import Leads from Excel .CSV or Import Gmail, Aweber, yahoo, Salesforce
- Browse to locate and select the required file that is to be imported.

File Format

The files to be imported must be in a CSV (comma separated values) file format. It must be an ASCII file (usually with a .txt or .csv extension in the Windows environment) where each line of text represents a single record.



Add Email Template

It's important, before designing your email template; to know the goal of creating this email template as well as knowing what kind of content you plan on placing into your email template. You can't really have a good idea of what you want your email template to look like until you know what your template is going to help your email accomplish and what kind of information you want in your email. Your email template is the foundation of your email because it dictates the layout of your email.

Follow the steps below to set up a new email template and learn how to make changes to the template

- From your MLeads Dashboard, click on **Menu > Email Template**
- Once you're in Email Templates, click the **Add** in the top-right to create a **New template**.

The screenshot shows the 'Email Message Template' management page. At the top, there is a navigation bar with 'Menu', 'Contact Us', 'Support', and a user profile 'Hi MLeads, Welcome to MLeads'. Below this is a toolbar with icons for 'Add', 'Edit', 'View', 'Trash', and 'Attachment'. There are two dropdown menus: 'Team Member' (set to 'MLeads Support Team') and 'Event/Lead Group' (set to 'Applicable to all Events'). The main content area features a table with the following structure:

Event/Lead Group Name	Subject	Status
Applicable to all Events and Groups	Invitation for attending online web conference	YES

Navigation controls for the table include 'First', '<Previous', '1', 'Next>', and 'Last'.

- From the next window that appears, we want to choose **Template Builder** (this will give us easy drag-and-drop modules to construct a template without having to use any sort of code) and then **Email**.

The screenshot shows the 'Add Email Template' form. At the top, there is a navigation bar with 'Menu', 'Contact Us', 'Support', and a user profile 'Hi MLeads, Welcome to MLeads'. Below this is a toolbar with icons for 'Add', 'Edit', 'View', 'Trash', and 'Attachment'. The form has a dropdown menu for 'Applicable to all Events and Groups' and a text input field for 'Subject'. Below the 'Subject' field, there is a note: 'We will personalize your email by adding 'Hi First Name,' at the start of the message. 'Email Signature' at the end of the body(if configured in my profile page). Enter the message body below:'. There is a rich text editor with a menu bar (File, Edit, Insert, View, Format, Table, Tools) and a toolbar with various formatting options. Below the rich text editor, there is a dropdown menu for '--Template Visibility Type *--'. At the bottom, there is a checkbox for 'Insert pre-define line text while sending email message.' and an attachment field with a 'Choose File' button and 'No file chosen' text. The form has three buttons: 'Add', 'Back', and 'Preview'.

- Add Subject Line and Select Template
- Visibility to Team member
- Click on Add

Email statistics

Email marketing is one of the most effective tactics for driving sales, but don't take our word for it. According to a study by Exact Target, 77% of consumers prefer to receive permission-based marketing communications through email.

Quality communication with your prospects and customers can get you closer to that nirvana of people actually looking forward to your message.

- User can see Statistics report of emails sent. User can also see Statistics report of the team members

Subject	Recipient	Date
Happy Thanksgiving to you and your family!	kdave@myleadssite.com	11/24/2015 04:57 pm


[Menu](#)
[Contact Us](#)
[Support](#)
 Hi MLeads, Welcome to MLeads 












Team Member:
 Event/Lead Group:
 Email Status:

Email Outbound Activity

Subject	Recipient	Date
Happy Thanksgiving to you and your family!	kdave@myleadssite.com	11/24/2015 04:57 pm
Event Management Automation Platform	kdave@myleadssite.com	11/20/2015 11:48 am
Sales and Marketing Automation Platform	kdave@myleadssite.com	11/20/2015 11:20 am
Free Webinar Invitation: Sales and Marketing Automation	kdave@myleadssite.com	11/18/2015 12:24 pm
Happy Thanksgiving to you and your family!	kdave@myleadssite.com	11/05/2015 05:48 pm
Happy Thanksgiving to you and your family!	kdave@myleadssite.com	11/03/2015 03:49 pm
Proud to announce the newest version of MLeads	kdave@myleadssite.com	10/16/2015 03:04 pm

Online Chat

Add Team Member


[Menu](#)
[Contact Us](#)
[Support](#)
 Hi MLeads, Welcome to MLeads 












Team Management

Add Team Member

Customize Product Interest

Customize Product interests + Add

Product Interest	 
Customize Product interests Manager [MLeads Team]	
Lead Management	
Event Management	

Customize Follow-up Action

Follow-Up Actions

System Follow-up actions

Call
SMS
Email
Customize Follow-up actions + Add
No Custom Follow-Up Actions Found.
Customize Follow-up actions For Manager [MLeads Team]
Send brochure
Setup Meeting

Add Customize Lead Status

Menu
Contact Us
Support
Hi MLeads, Welcome to MLeads

Lead Status

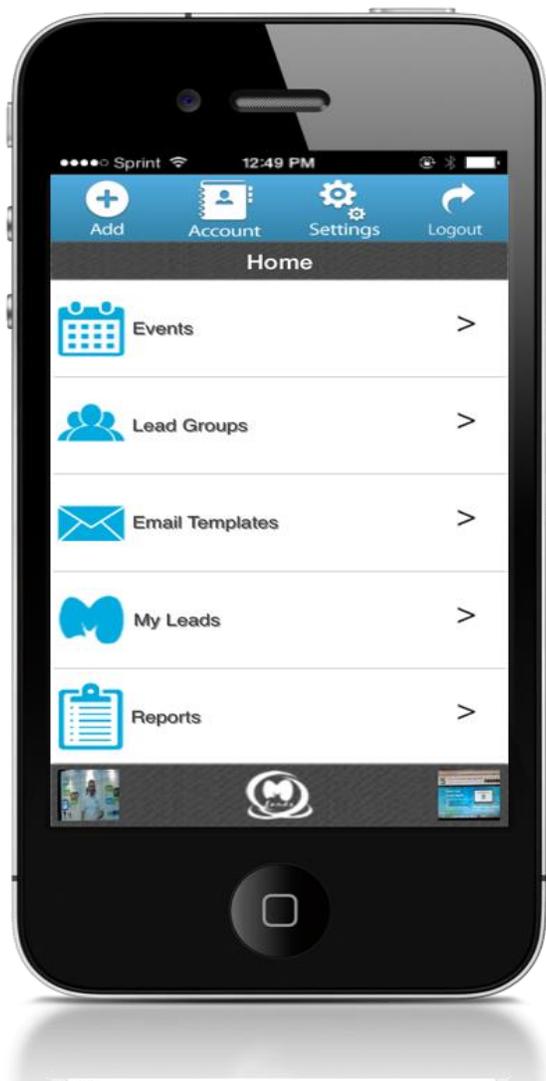
System Lead Status

Other	
Target Lead	
Cold	
Warm	
Hot	
Qualified	
Contacted	
Not Contacted	
Contact In Future	
Converted to Customer	
Current Customer	
Customize Lead Status + Add	
Customize Lead Status For Manager [MLeads Team]	

RFP Submitted

MLeads Support

For more in-depth features information, Logo on www.myleadssite.com



MLeads

Business Center, of Lansdale

650 North Cannon Avenue, Lansdale, PA 19446

Phone :(267)263-3178 Fax: (267)-200-0026

Email: info@myleadssite.com

Support@myleadssite.com

Important Links

How It Works? :

<https://www.myleadssite.com/howitworks.php>

Instant Support:

<https://www.myleadssite.com/support.php>

Demo and Training online:

<https://www.myleadssite.com/webinars.php>

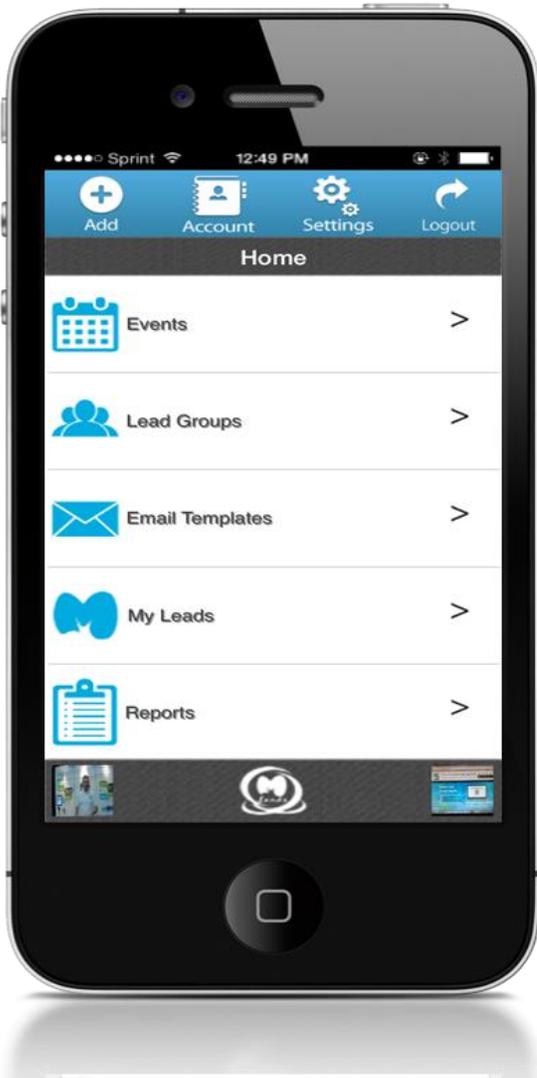
FAQ:

<https://www.myleadssite.com/faq.php>

Special Thanks from MLeads

Get Free Account Now

Download app from Apple, Google or Amazon app store Search for "MLeads"



Connect With Us

