MLeads

A step-by-step guide
to level up your business

Mobile App User's Guide

BY MLEADS

Index

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 amanagement 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 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.

- Lack of Productivity
- Not having access to information instantly and anywhere without being dependent on support staff
- 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
- Not having clear visibility across sales team efforts
- Not having ability to share personal contact details and video profiles capability to show product and services demo anywhere
- 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 Lead 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 Features

They help readers jump to topics of interest

✓ Quick captures and organizes leads by events or Groups using any lead retrieval methods (Scan business card, Nearby Share, Scan Badge, Scan QR Code, Speak, 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:
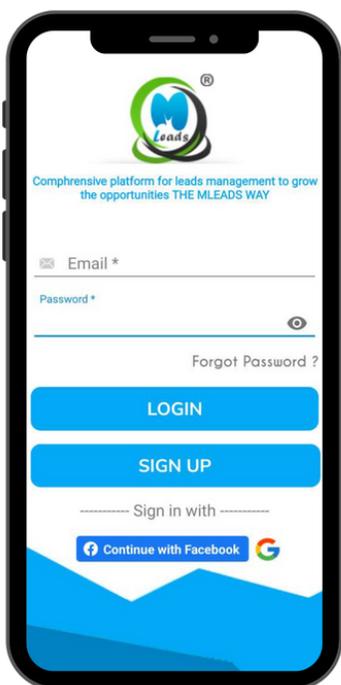
Click on sign up button to Register

Enter all details require and click on submit
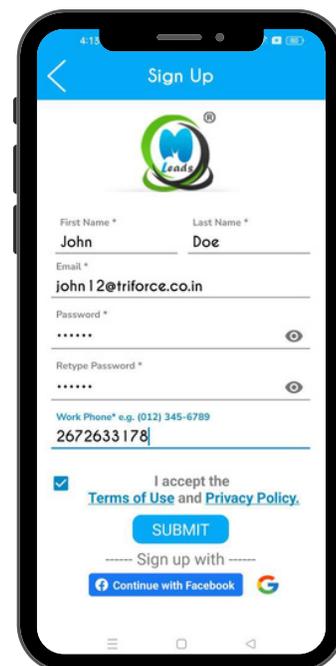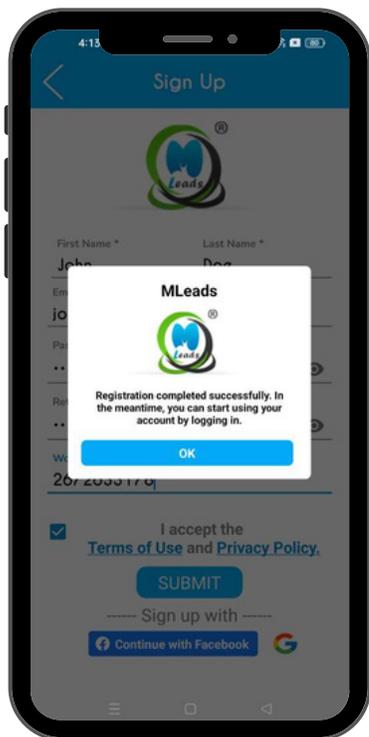
CLICK ON OK

- Enter User email id and password

- Click on Login
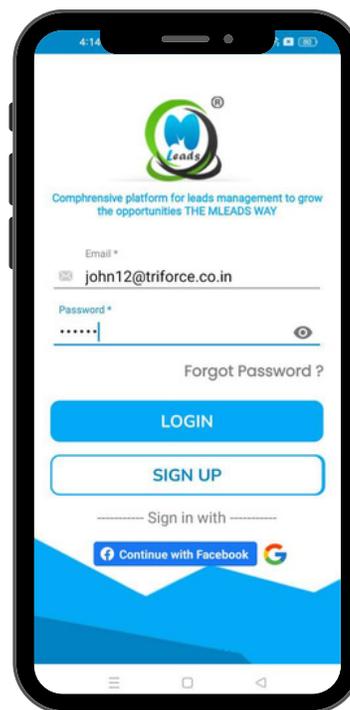
Current User:

- Enter user id and password
- Click on Log in
- After log in it's ready to access MLeads app in your device.
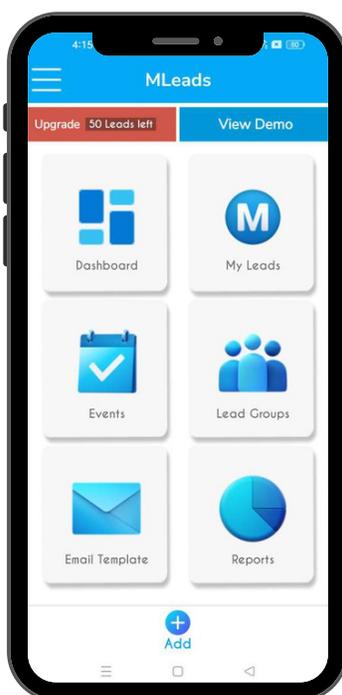
Note: If you are not able to log in your account then click on 'Forgot Password' and follow the instructions to reset your password

App Overview:

Capture Lead information during or after the event using MLeads. MLeads offers 8 quick ways to capture Leads.
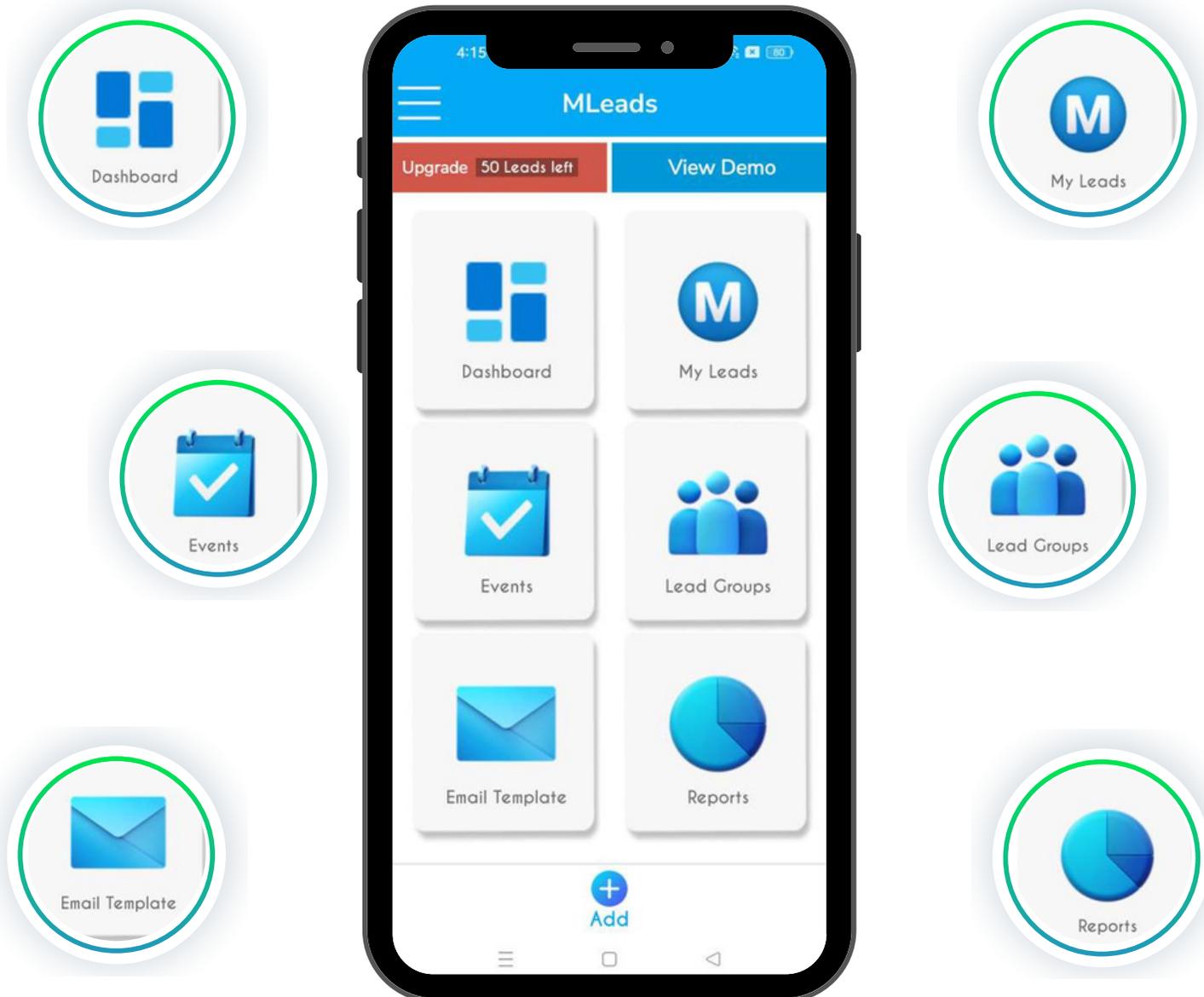
You get 50 leads when you create a free account.

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
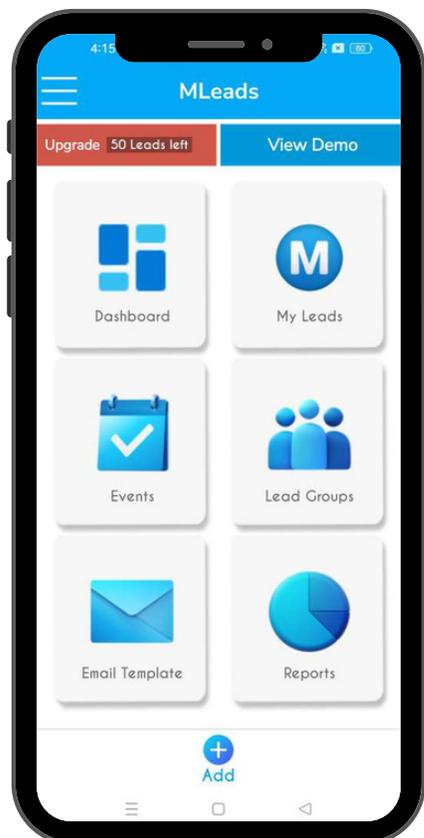
CLICK ON EVENT

- Enter your event information

- Here user can "Add Note" for event also user can select Visibility to your team member or no
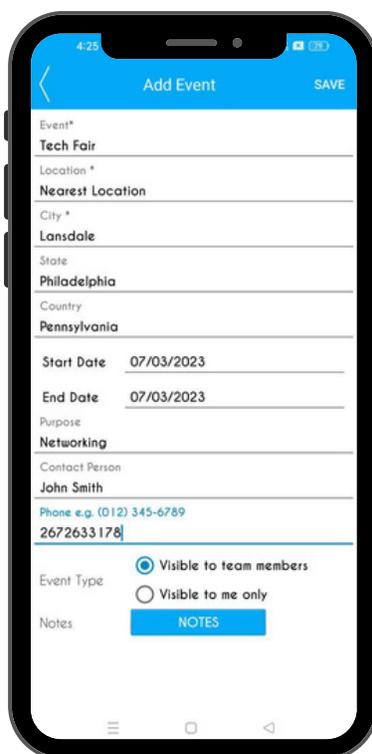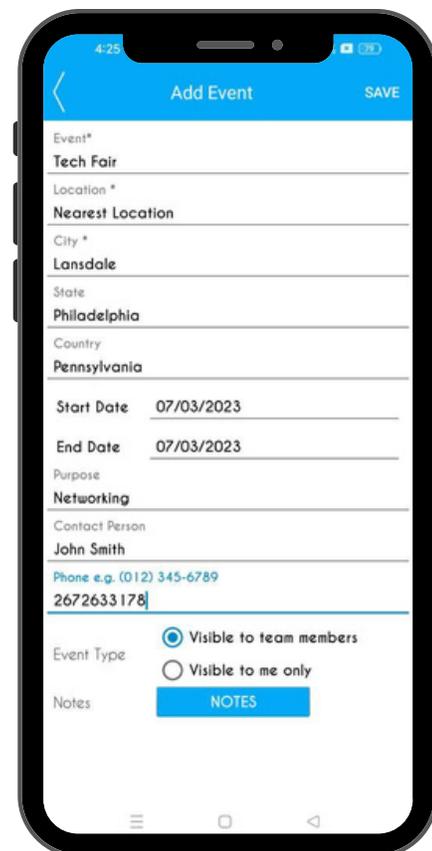
Click on Save

Event Added Successfully

MLeads as Leads Management

Create Event or Group
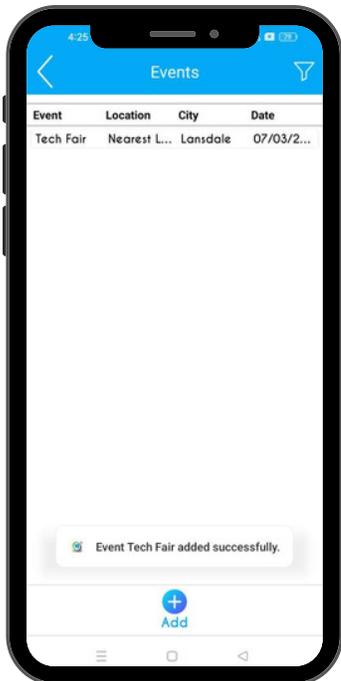
USER CAN SEE LIST VIEW ON EVENT

- User can click on the event to view event options

- User can see upcoming or past event of team member.
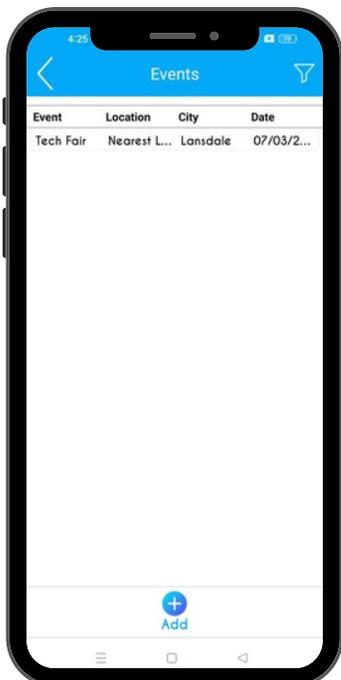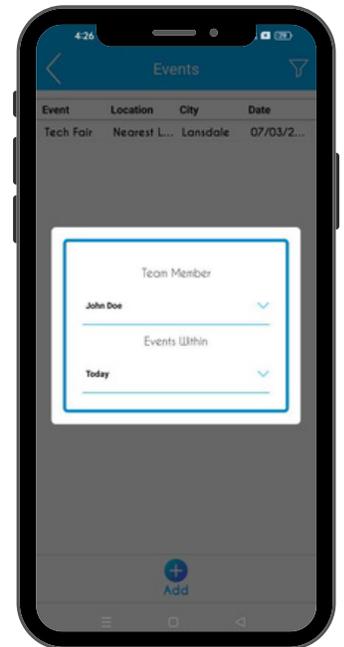
- Create Task
- View Leads
- Import your leads
- Send messaging to all
- Share and Un-share your leads with Team member
- Transfer your leads
- You can delete your leads
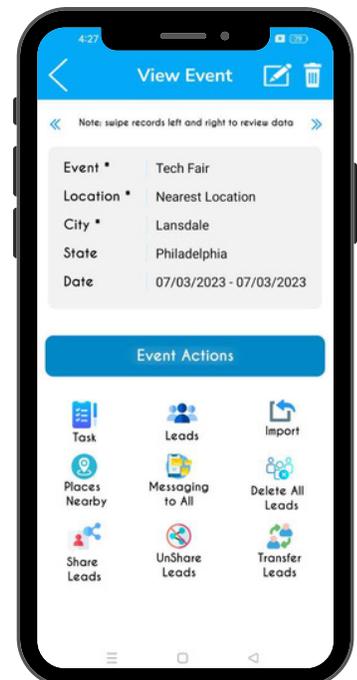
# MLeads as Leads Management

Add Lead Groups
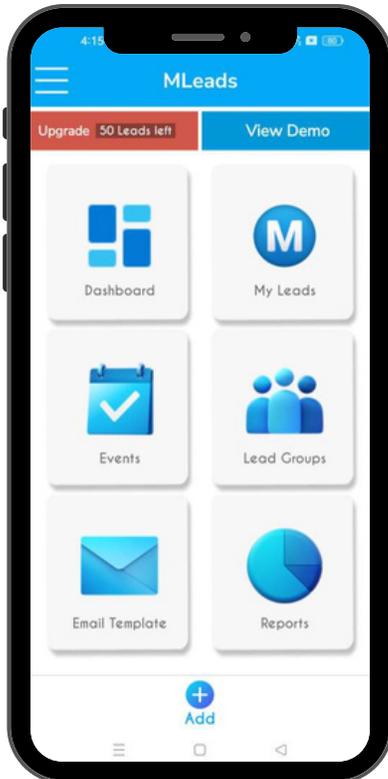
- On Home screen click on Lead Groups

CLICK ON ADD
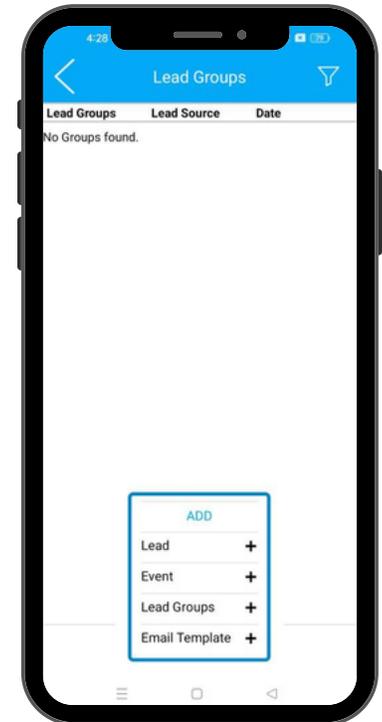
ENTER REQUIRE INFORMATION

- 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
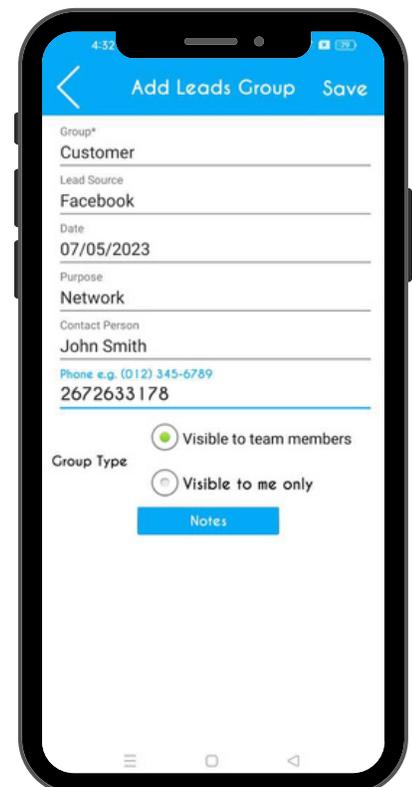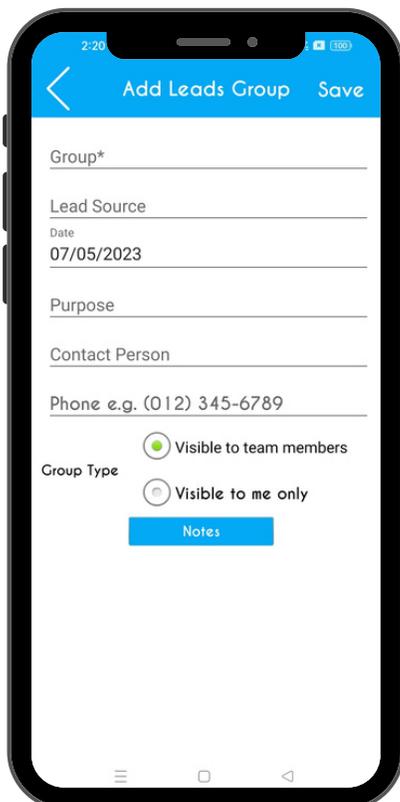
MLEADS AS LEADS GROUP MANAGEMENT
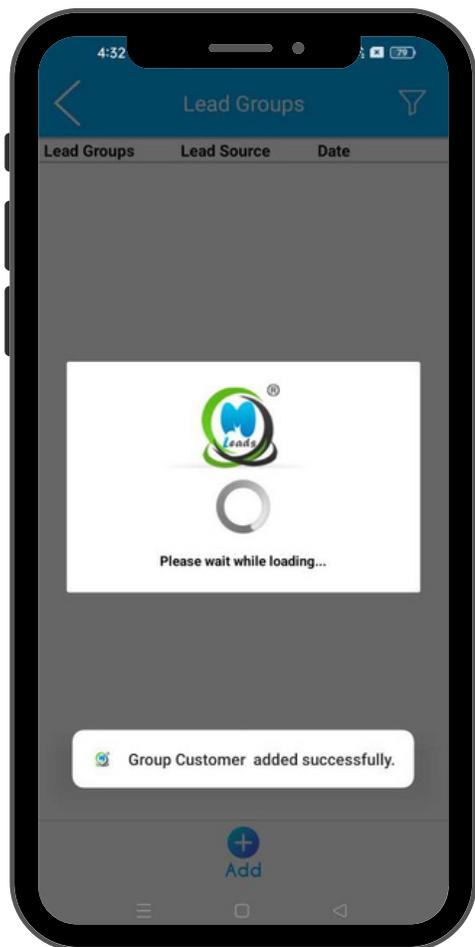
GROUP ADDDED SUCCESSFULLY

■ 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
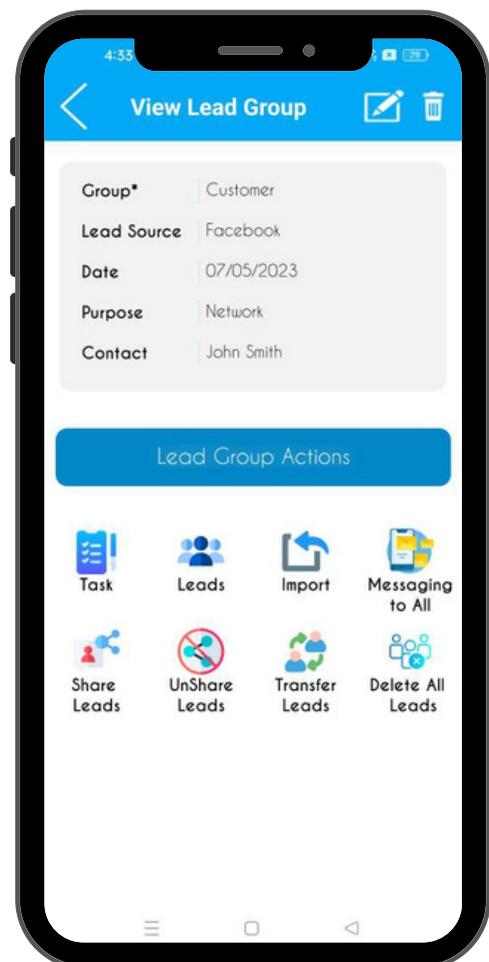
Add Email Template

Create Email Template
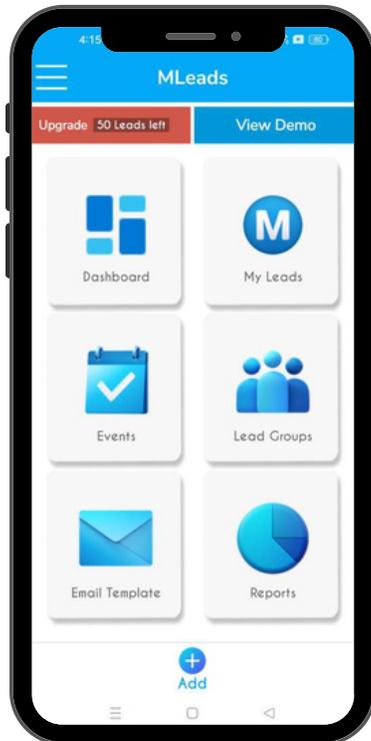
- Click on the Email templates option on the Home Screen

- Click on the Add button
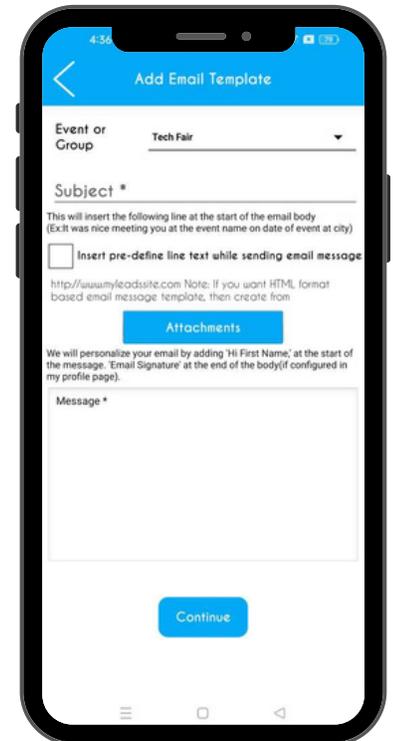
- User can Attach your document, files, pdf, photos in the mail

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

- Enter Subject and click on Continue

- You can see the template preview

- Click on save

Add Email Template

Create Email Template

- 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
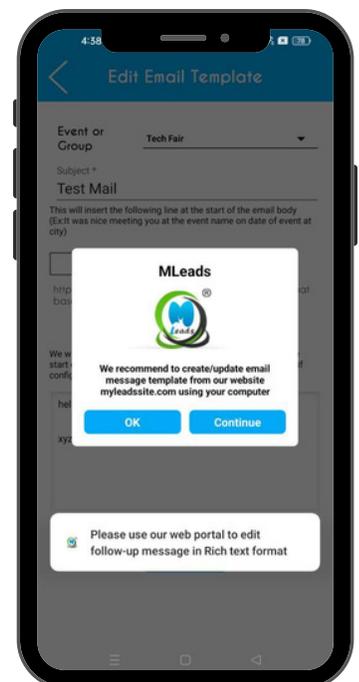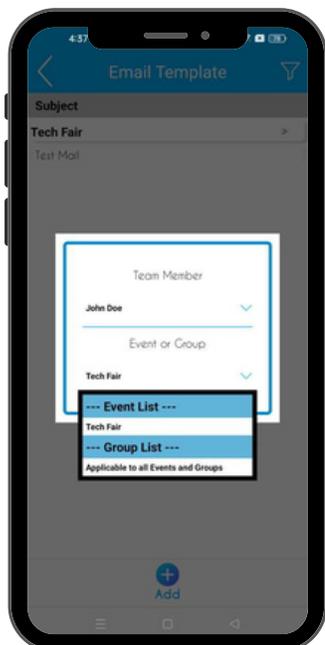
MLeads Stream Lines Lead Management

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!

Lead Retrieval	Lead Research	Follow-ups	Measure Stats
Manage Events or Groups	Team Management	Map Leads	Lead Actions

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!
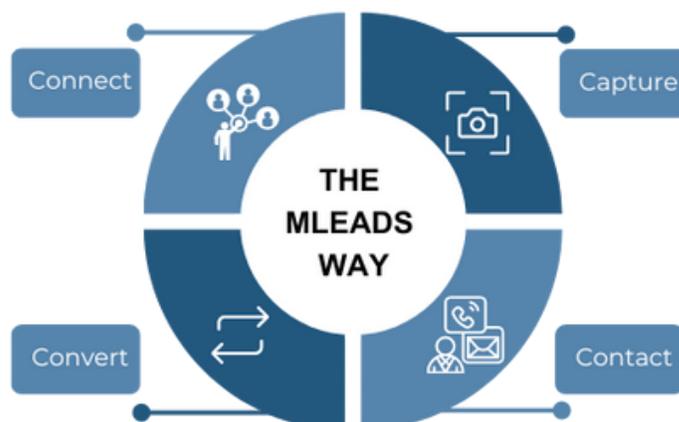
Add Leads
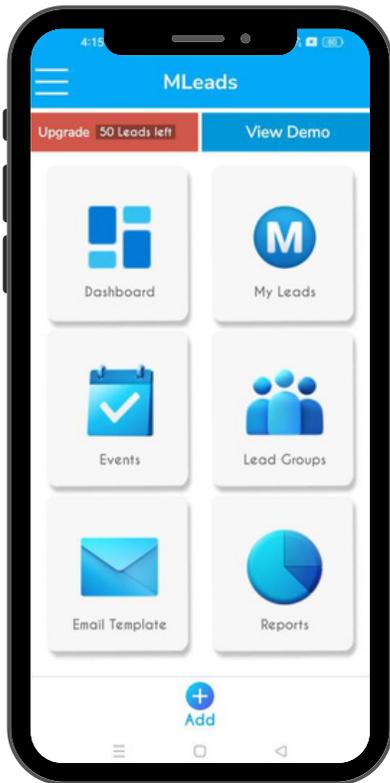
- Click on the My Leads option on the Home Screen

- 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

QUICK CAPTURES AND ORGANIZES LEADS BY EVENTS

or
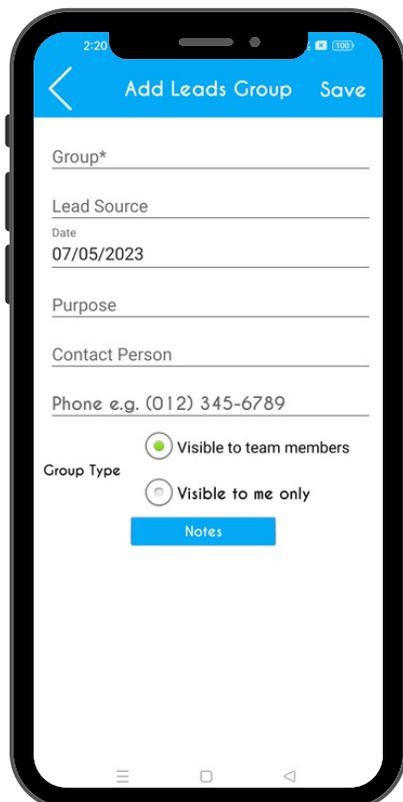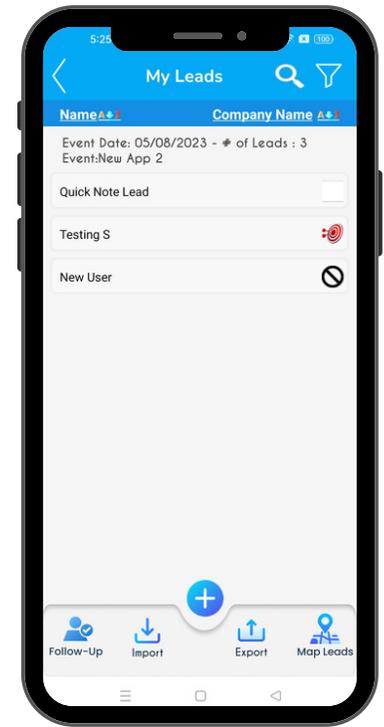
GROUPS USING ANY LEAD RETRIEVAL METHOD

# Leads Retrieval Methods

Method-1 Scan Business Card
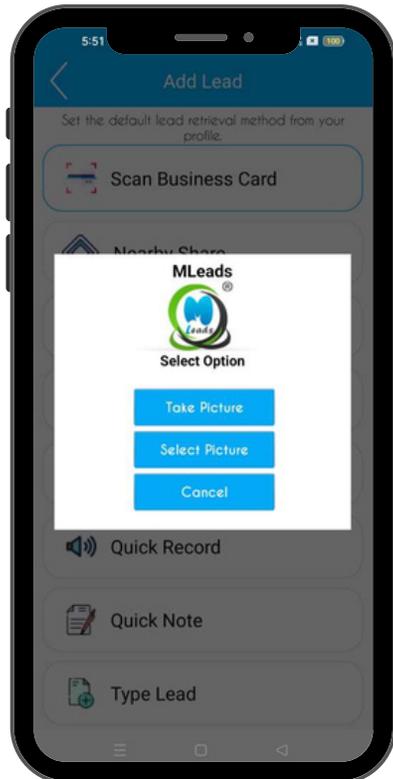
Click on Scan Business Card

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.
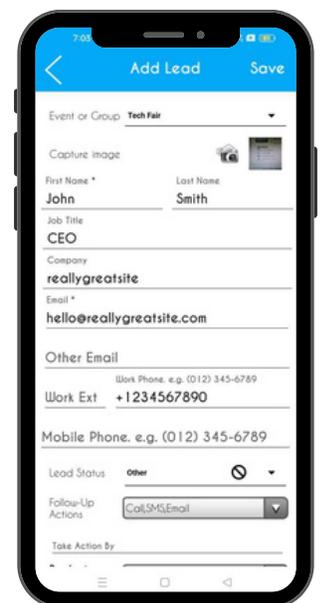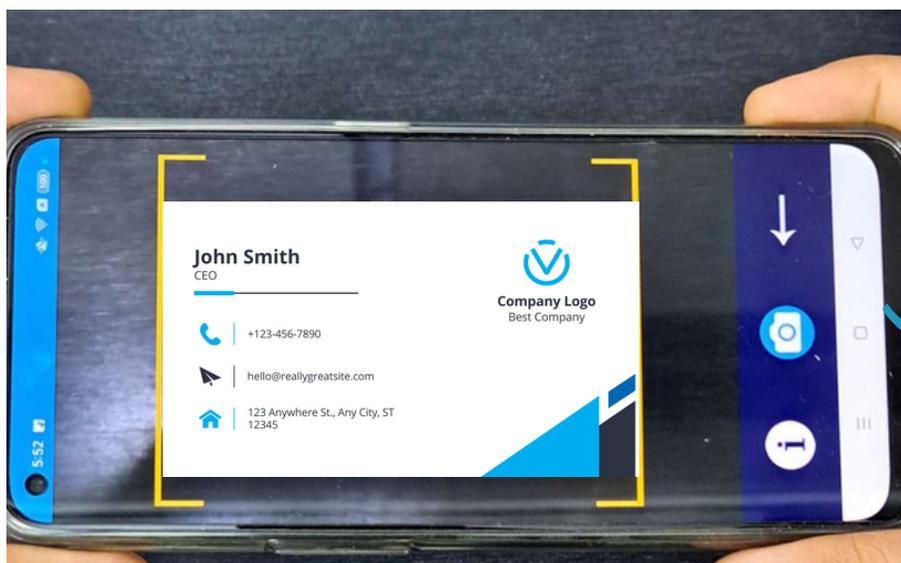
Nearby Share (With MLeads User)

Here are the steps on how to use Nearby Share to exchange leads in MLeads: (Share your details with MLeads user)

Grow your business fast in a smart way!

Method-2   Nearby Share
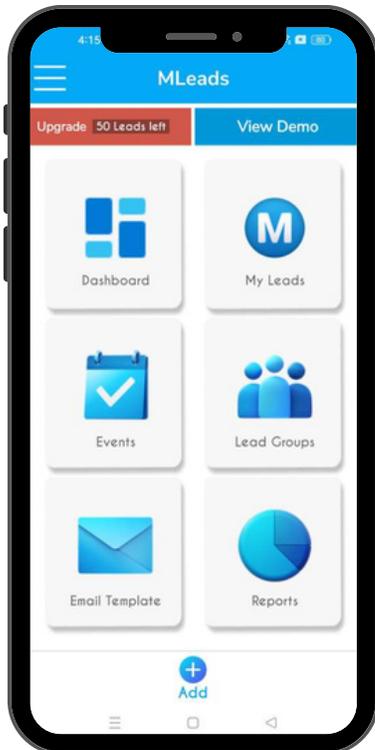
OPEN THE MLEADS APP.

TAP THE ADD BUTTON.

TAP LEAD.
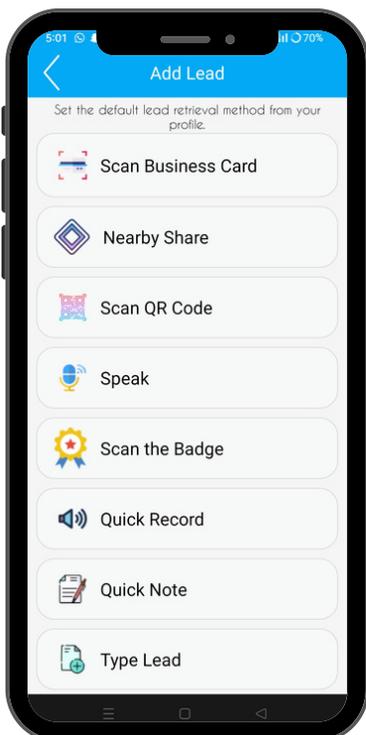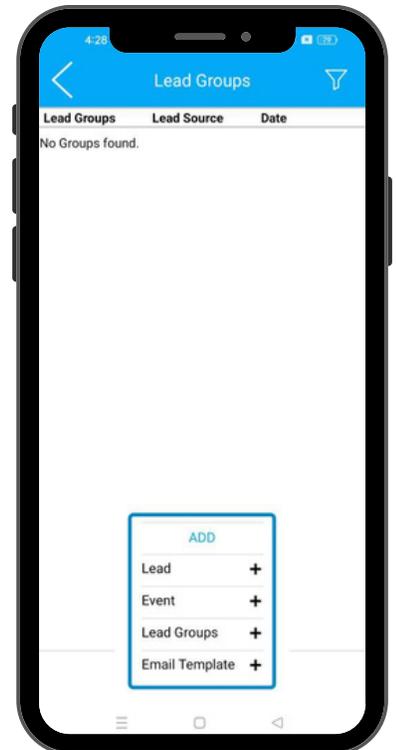
- Tap Nearby Share.

- Click "Discover MLeads User" to exchange leads with an MLeads user.

- Ensure that "Everyone" is selected as the device visibility setting for both users.
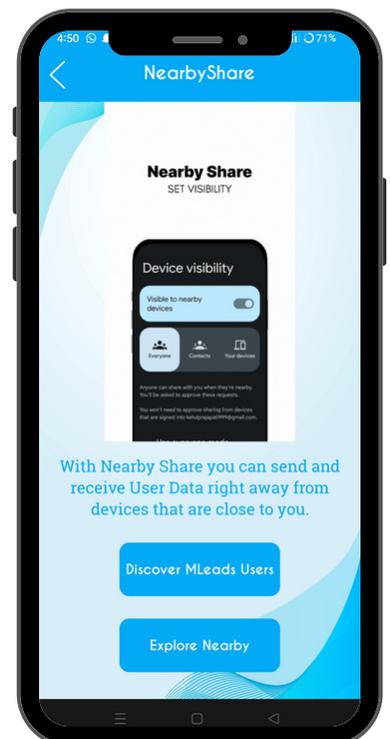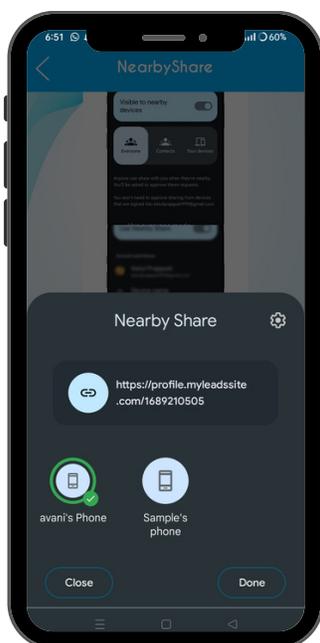
Nearby Share (With MLeads User)
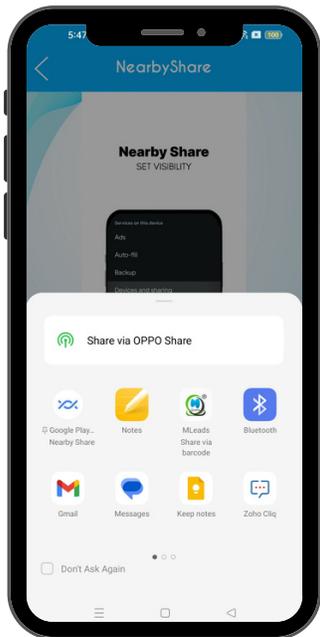
- Tap on Nearby share

- When you click on NearBy, a popup will appear with a list of people who have turned on Nearby Share.

- Select the user you want to exchange leads with.
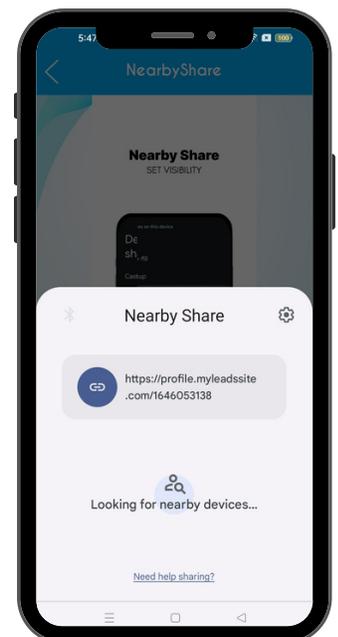
**HERE ARE SOME ADDITIONAL TIPS FOR USING NEARBY SHARE TO EXCHANGE LEADS IN MLEADS:MLEADS APP.**

- Make sure that both users have Bluetooth and Location turned on.

- If you are having trouble connecting to another user, try moving closer together.

- You can also exchange leads with users who are not in your immediate vicinity. However, this may take longer, as the leads will need to be sent over the internet.
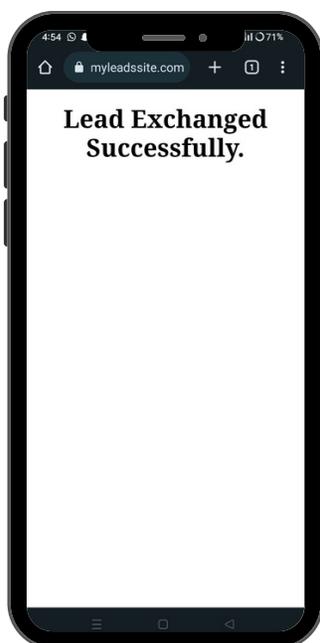

- The lead will be exchanged successfully.

- The lead is shown in the most recently created event.
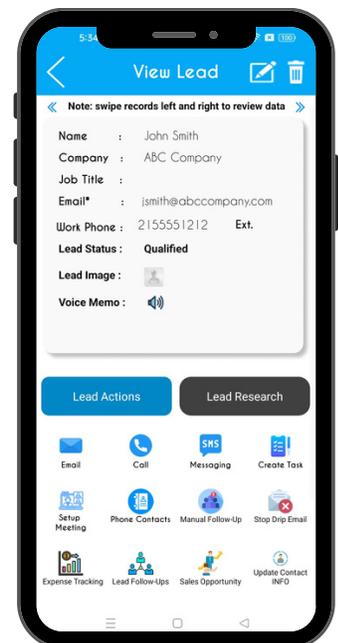
Nearby Share (With Any User You Want)

Here are the steps on how to use Nearby Share to exchange leads in MLeads: (Share your details with you want)
Grow your business fast in a smart way!

OPEN THE MLEADS APP.

TAP THE ADD BUTTON.

TAP LEAD.
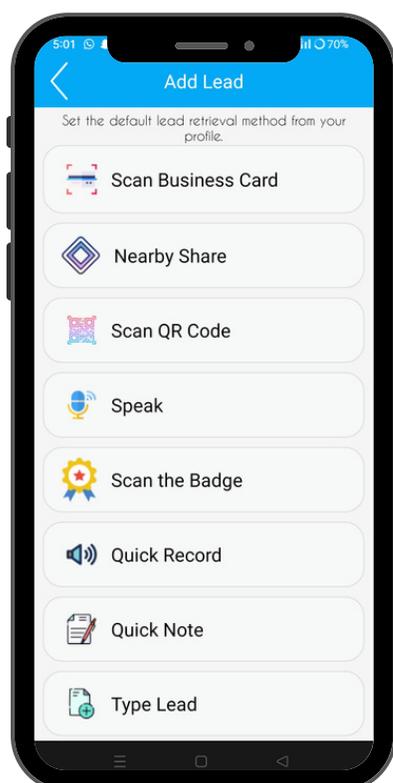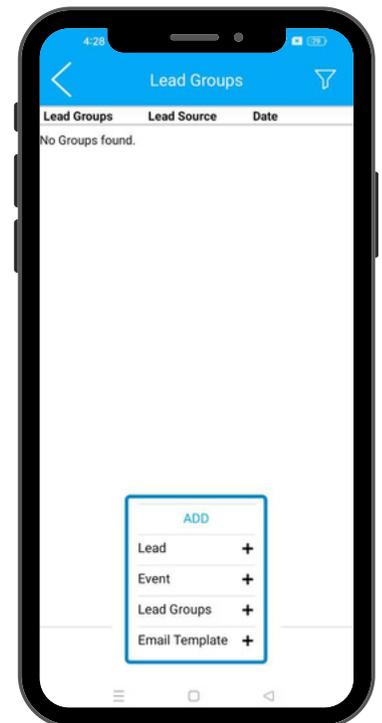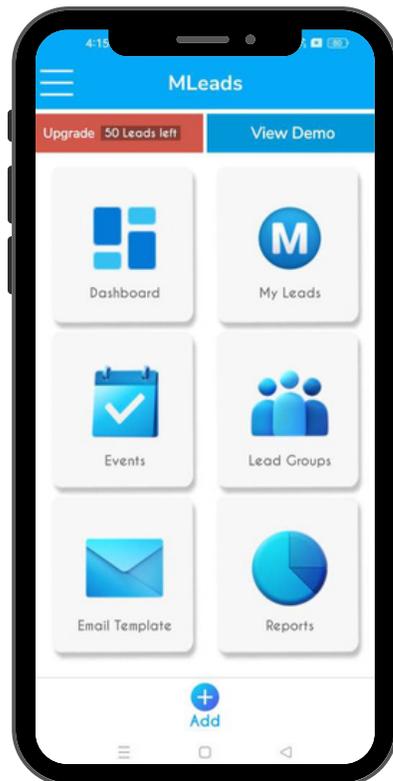
- Tap Nearby Share.

- Click on the Explore Nearby option if the other user does not have the MLeads.

- Ensure that "everyone" is selected as the device visibility setting for both users.
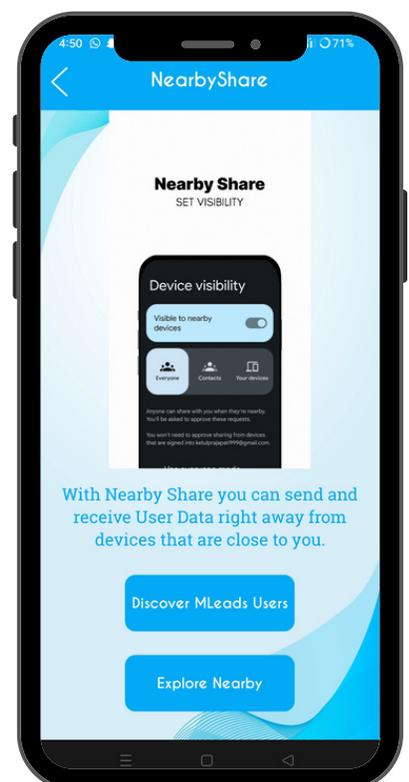
MLeads - Near By Share Integration
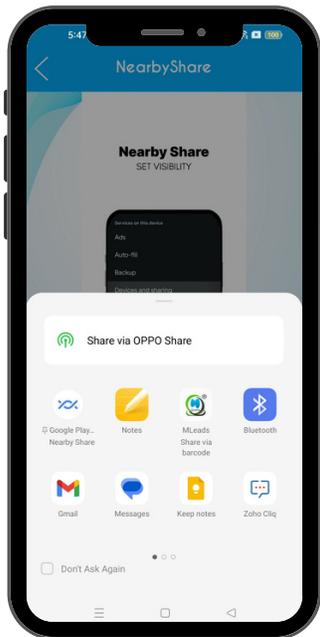
■ Tap on Nearby share

■ When you click on NearBy, a popup will appear with a list of people who have turned on Nearby Share.

HERE ARE SOME ADDITIONAL TIPS FOR USING NEARBY SHARE TO EXCHANGE LEADS IN MLEADS:MLEADS APP.

■ Make sure that both users have Bluetooth and Location turned on.

■ If you are having trouble connecting to another user, try moving closer together.

■ You can also exchange leads with users who are not in your immediate vicinity. However, this may take longer, as the leads will need to be sent over the internet.

■ Choose the person with whom you would like to exchange leads.

■ Other user will get a link. Click on Open.
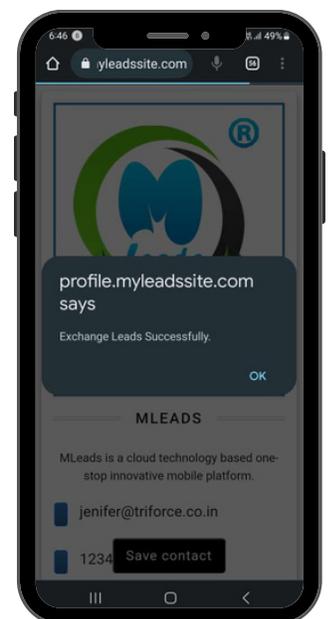
MLeads - Near By Share Integration
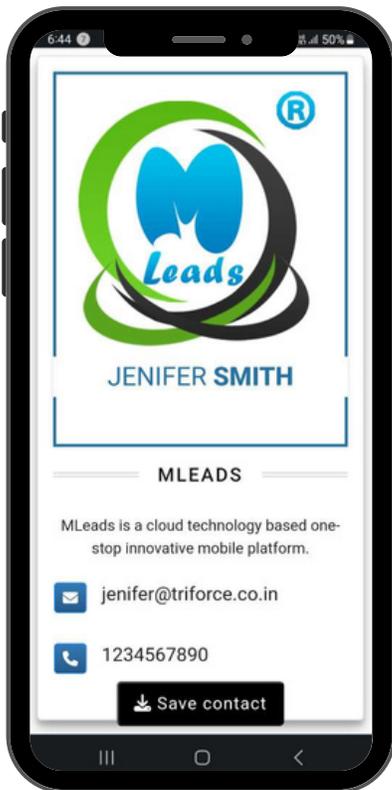
- You will see the details of Sender (MLeads User).

- Other users can download MLeads User's contact information by clicking on Save Contact
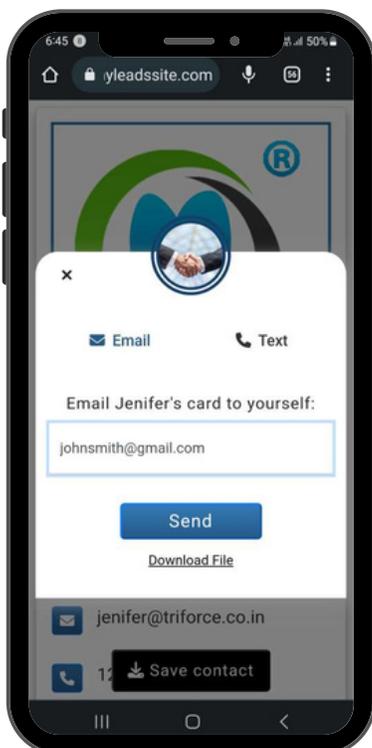
- Other users can send MLeads user information to their Email address

- Other users can send MLeads user information to their phone number.
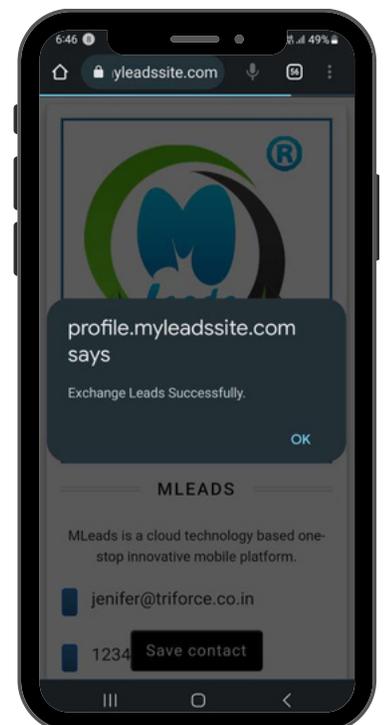
MLeads - Near By Share Integration

■ By filling out the form, other users have the option of sharing their information with MLeads users.

■ The lead will be exchanged successfully.

■ You can view the lead within your Exchange Lead Group.

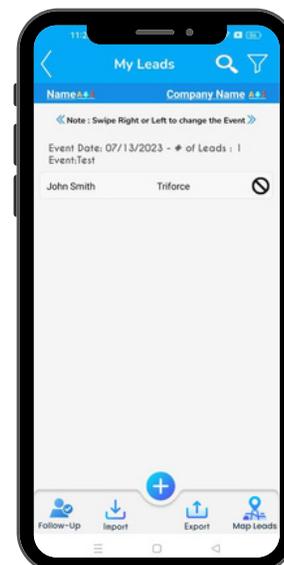# Leads Retrieval Methods

Method-3 Scan the Badges
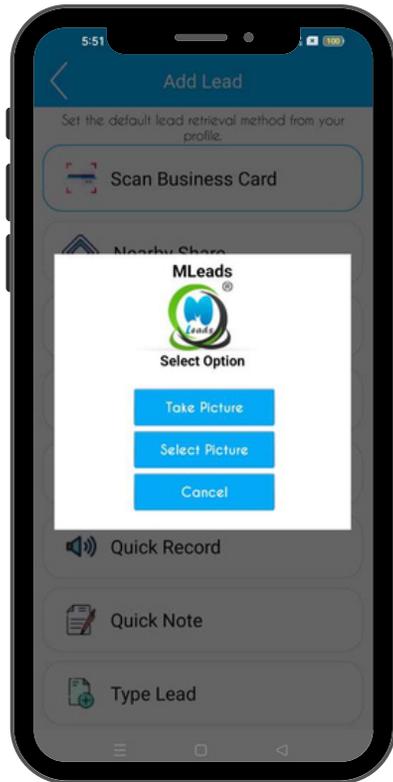
Click on Scan the Badge

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.
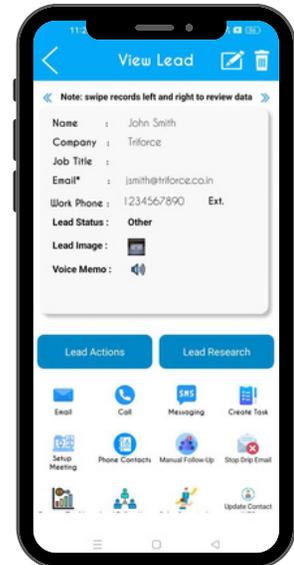
Leads Retrieval Methods

Method-4 Speak Leads
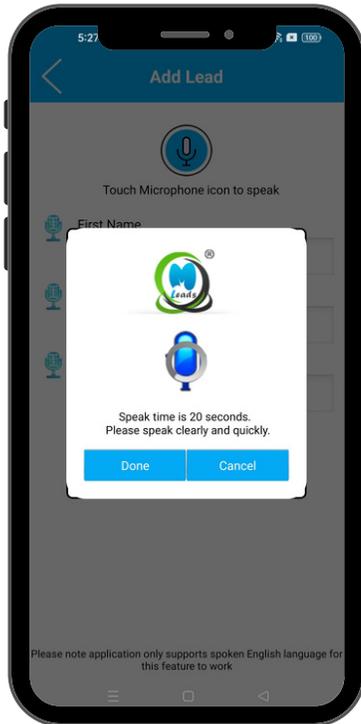
Click on Add Speak Leads

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, and phone number.

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
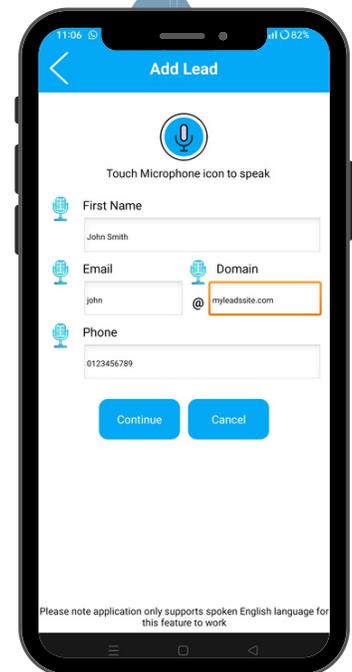
Leads Retrieval Methods

Method-5 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 Lead Added 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.
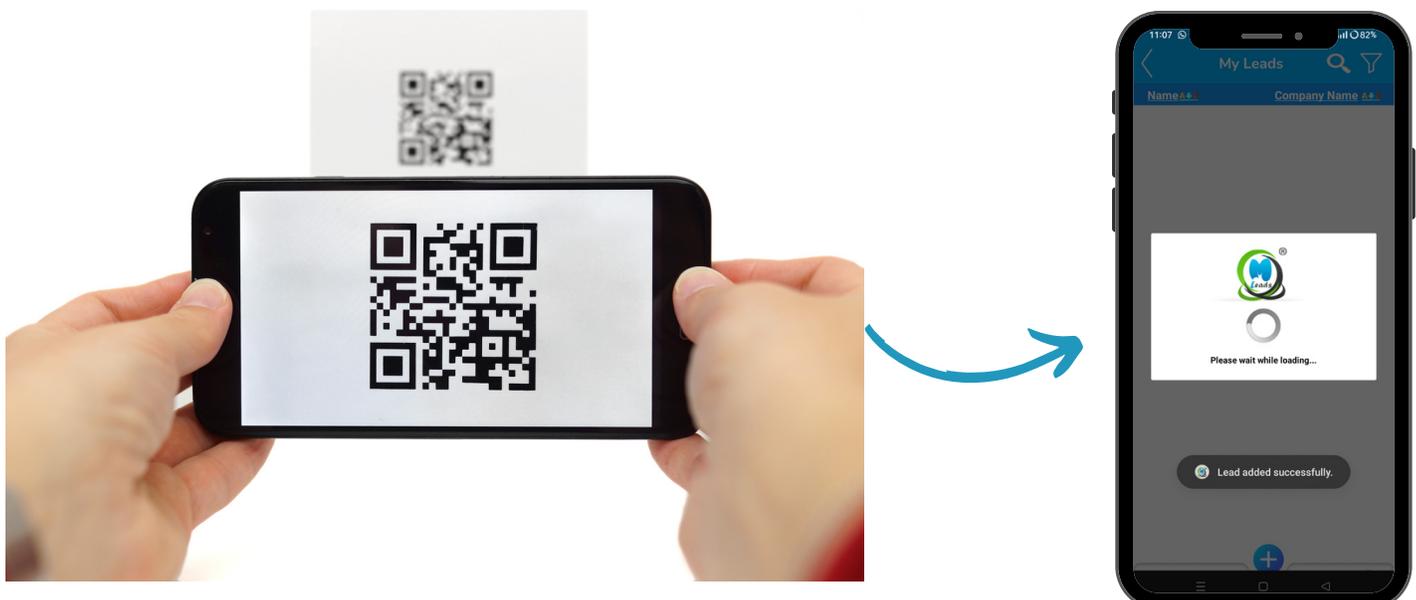
Leads Retrieval Methods

Method-6 Quick Note

Click on Quick Note

- Quick Notes allows you to quickly add a lead if you or the person in front of you is in a hurry.

- Because it has enough fields which are required for contact

- Additionally, you may write down notes in the Quick Note lead.

Method-7 Quick Record

Click on Quick Record

- Start to speak and after completing click on save and play
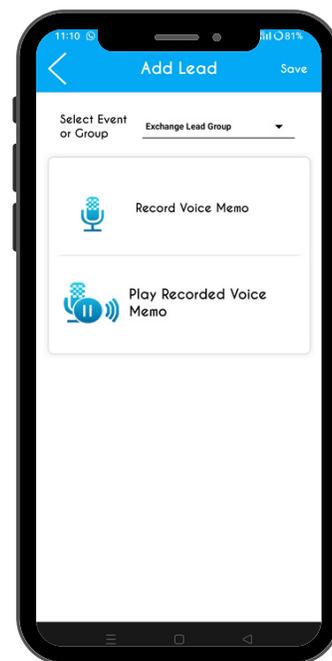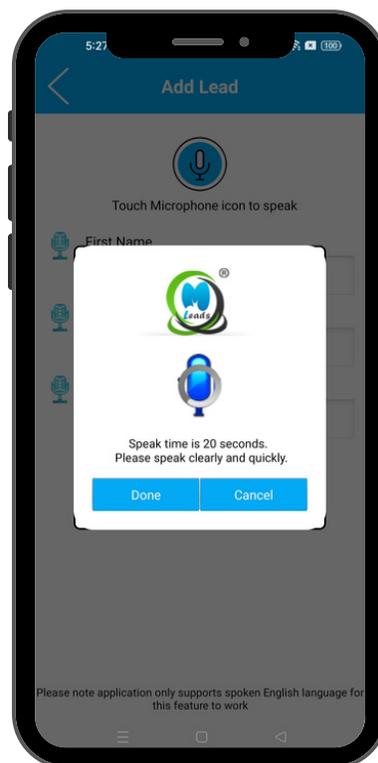
Leads Retrieval Methods

Method-8 Add Leads Manually
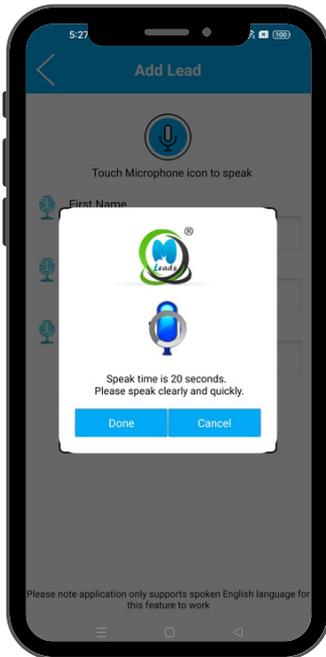
Click on Type Leads:

- 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 & Twitter

Social Profiles

Search Profile - LinkedIn

Website

Google Search

Map Search

Facebook

Twitter
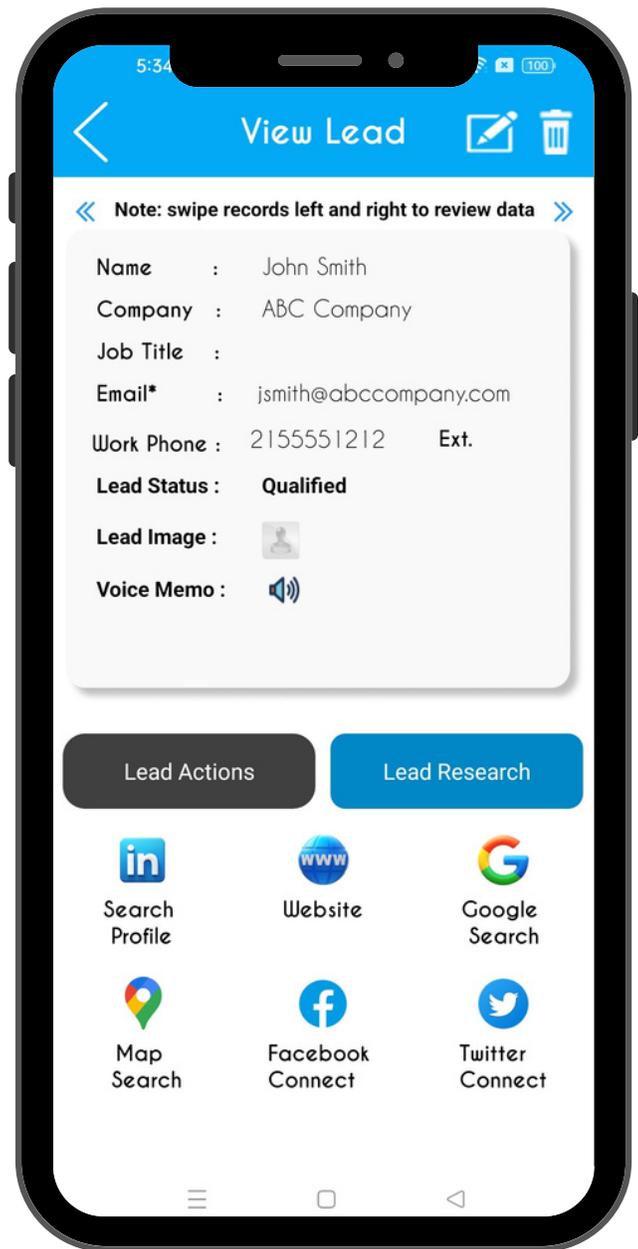
Lead Actions

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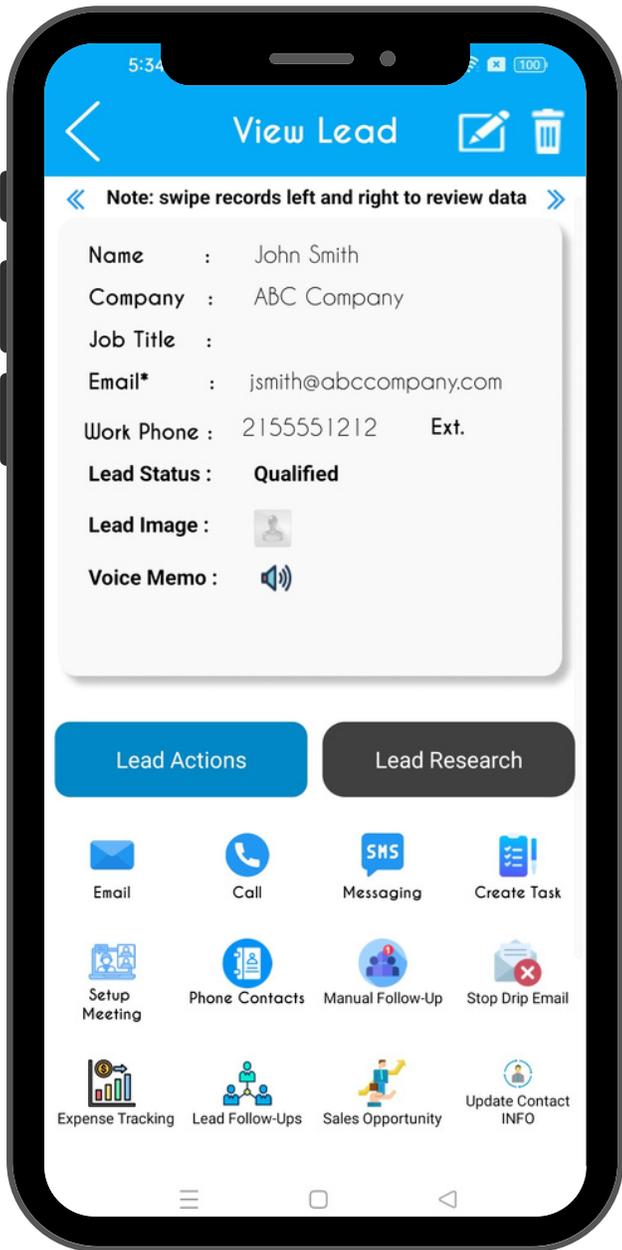
Send email using predefined email template

Make a phone call

Send text message

Schedule task

Schedule meeting and send reminder mail

Add phone contacts and save in the device

View Lead

Create manually follow up

Stop drip mail

Track & maintain expense on leads

Track lead follow up

Sales opportunity

Update your phone information

Measure Statistics

- Measure ROI, ROO, and visibility into productivity across team

- Pipeline Report

- Statistical Report

- Sales Cycle Report
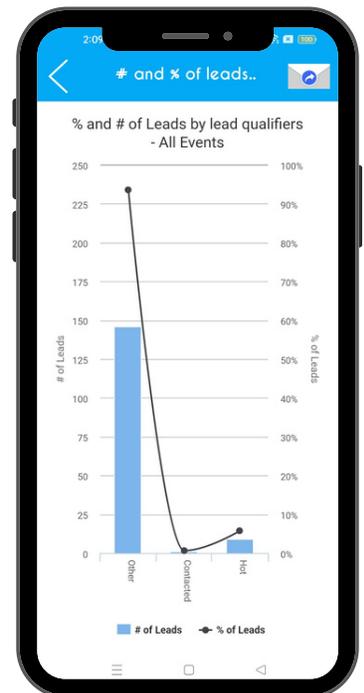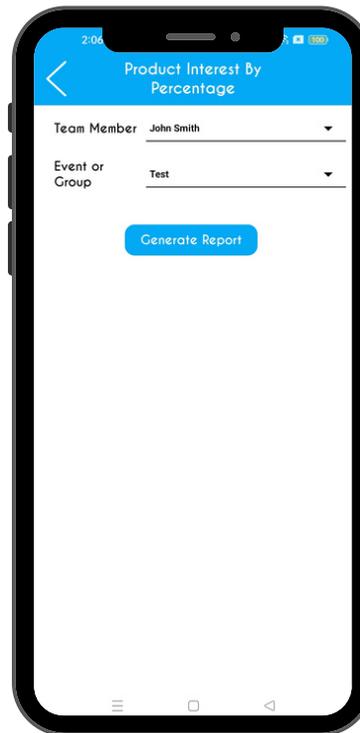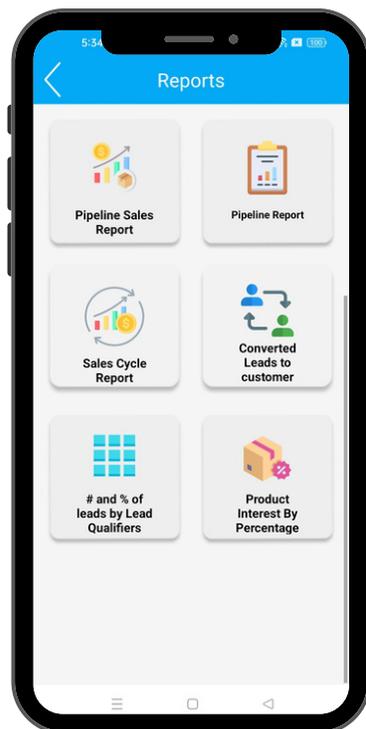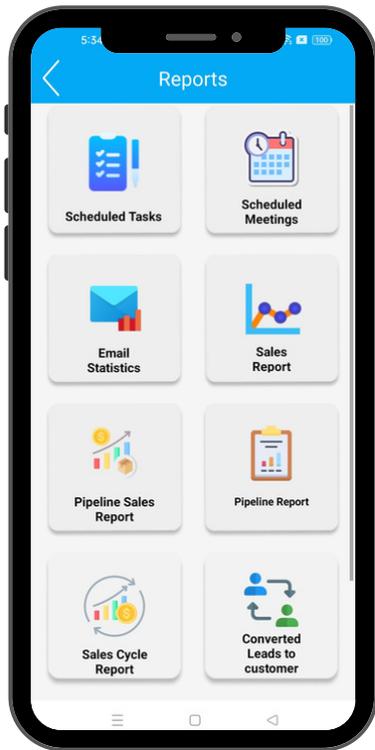
Import & Export Data

- Export your Leads in Excel .csv file format

- Export leads to salesforce

- Import your leads from different source system

- Import from Excel .csv file, Gmail, Phone Contacts and Salesforce.
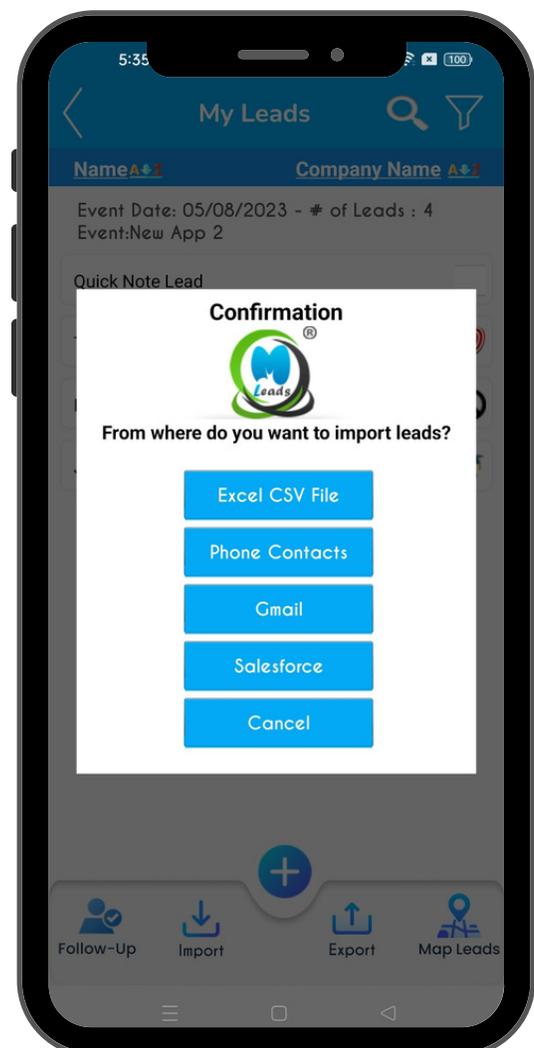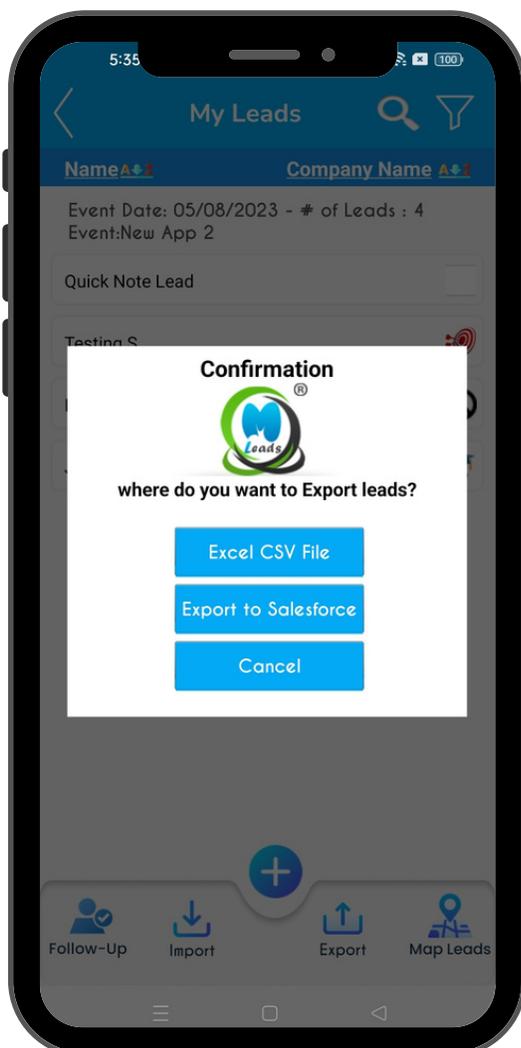
Team Management
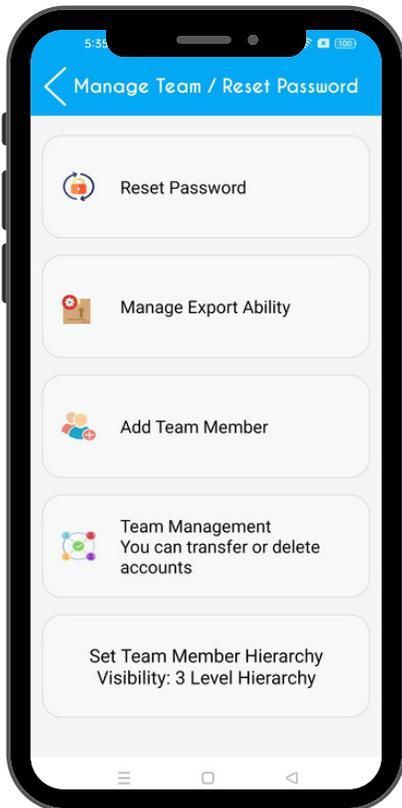
- As team leader user can manage team

- 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/edit your person information like first name, last name, job title, company name, phone number 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

The
Right
Process

+

The
Right
Tool

=

Success
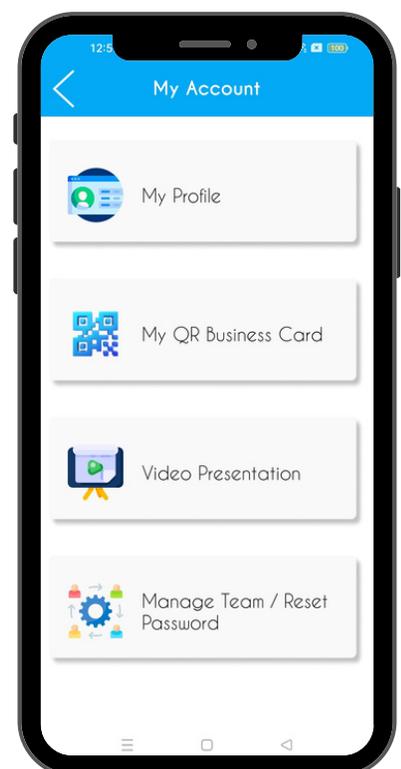
Mange Leads from Web Platform

Open http://www.myleadssite.com

Click on login and enter email and password

If you are new user then click on sign up
If you a re not able to login then click on Forgot Password?

Welcome to MLeads Dashboard

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
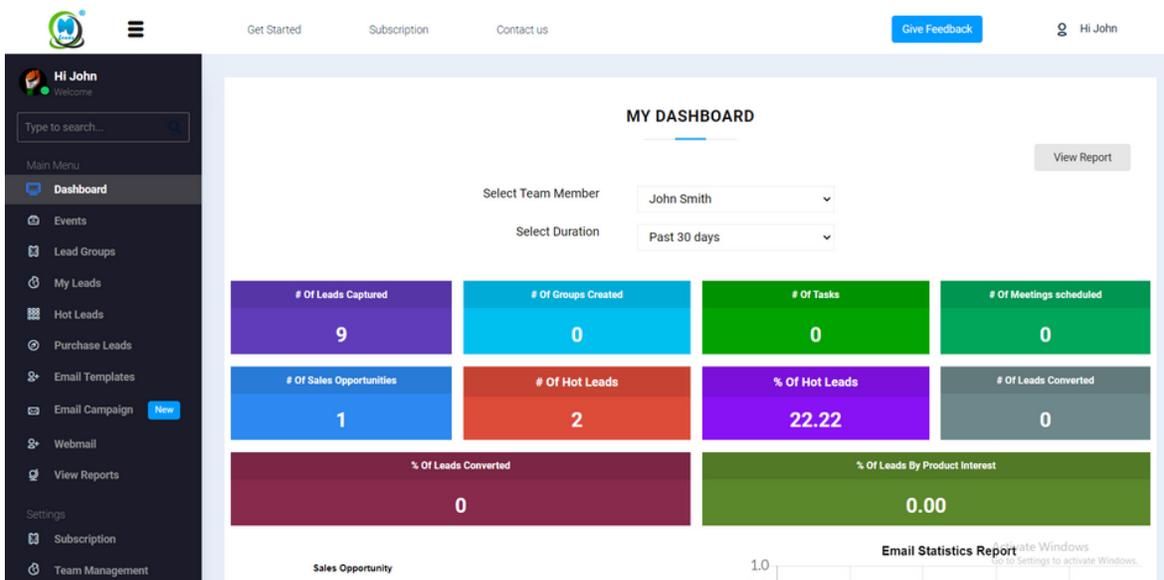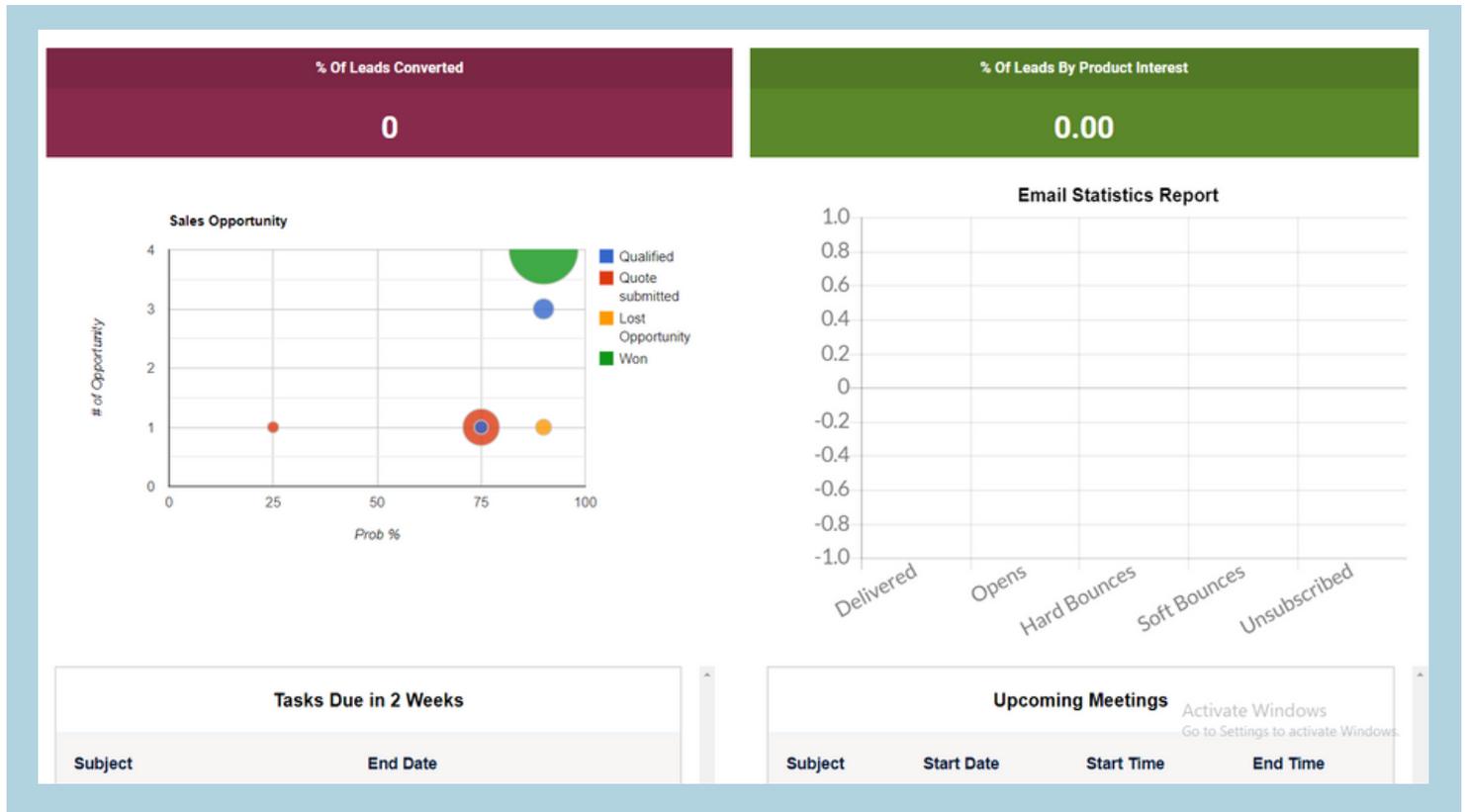
User can see different Menu options by clicking on 'Menu ' tab on the top and will have to access to features to access Events, Lead Groups, Leads, Email Statistics etc.

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 various features to operate on the events related data
- User can Add, Edit, View, Delete, Schedule Task , Import the Leads, Search Near by Location from event location

Lead Group

- Users can also track leads by group
- Users can create, edit, view and delete Lead Group
- User can import Leads from various source like Excel .CSV, Salesforce, Gmail, etc.

Lead Group

Scheduled Task

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

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 YOUR 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)

	Company	First name	Last name	Email	Phone	Voice Memo	Card Image	Notes
☐	BANK OF AMERICA	Jeanette	Nguyen	jeanette.nguyen@bofa.com	6109414849 📞	N/A	🖼	N/A
☐	The Chemours Company	Sunil	Naik	sunil.mohan.naik@chemours.com	3027731272 📞	N/A	🖼	N/A
☐	JWH & Associates	James Haile Jr.,	CPM	jwhaile@netzero.net	6104900470 📞	N/A	🖼	N/A
☐	Temple University	Misty	Blessley	misty.blessley@temple.edu	2152048150 📞	N/A	🖼	N/A
☐	jrm supplier consulting	Jim	Moran	jim@jrmsupplierconsulting.com	12674281490 📞	N/A	🖼	N/A
☐	Drexel University	Julie Ann	Jones	jaj358@drexel.edu	2158951910 📞	N/A	N/A	drexel.edu/procurement
☐	Swarthmore College	Christopher	Kane	ckane1@swarthmore.edu	6103481644 📞	N/A	N/A	N/A
☐	Radian Group Inc.	Sharon	Manker	sharon.manker@radian.com	2679017102 📞	N/A	N/A	N/A

Event Name : ISM Philadelphia(06/14/2023) - No. of Leads 8
Doubletree, Philadelphia

Show 10 entries

Search:

My Leads

First «Previous 1 Next» Last

Showing 1 to 8 of 8 entries

Log out

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.

User can filter leads by selecting Event and Leads Group

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

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, Gmail, Salesforce and Scan Business Card.

■ 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.
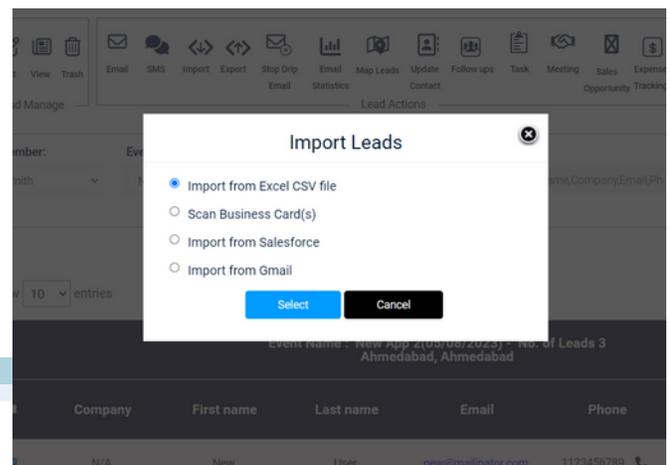
PURCHASE LEADS

- Here you'll find high-quality leads. Our purchase leads come from trusted sources, so you can be sure they're high-quality. Our leads are updated regularly, so you'll always have the most accurate information.
- If you are interested in purchasing leads, click on the "purchase leads" option from the sidebar menu.
- If you need to buy leads for a clothing company, for example, enter "clothing" in the search box.

- Following this, the entire clothing-related list will be displayed on the screen. You may look anything up using either NAICS Codes or SIC Codes.

PURCHASE LEADS

- You can choose one or more options from the list, depending on your preferences.
- You can view the quantity of clothing-related leads in the box on the right.

- If you are just interested in leads related to clothing in the United States as a whole, then click the "done" button; otherwise, you may Purchase leads relating to particular states and cities by choosing the "next" button.

On the geography option, choose the states and cities where you wish to purchase leads.

PURCHASE LEADS

- You have the ability to pick multiple states from this drop-down list.
- After making your selection, you have to select the city by clicking the " Add City " button.
- If you only want leads about states and cities, click the "done" button. If you want to choose a specific business size instead, click the "next" button.

- On the "Size of Business" tab, you can choose the number of employees.
- If you want to lead a company with 50 employees or more, just choose the 50-99 choice.

After choosing the business size, click the next button to continue to the final step.

PURCHASE LEADS

- The data that you have selected will appear in the Complete tab. If the information satisfies your needs, you can proceed by clicking the Done button.
- If there is any value that you do not want, you may remove it from the table that is below.

PURCHASE LEADS

You will receive a pop-up screen after pressing the Done button on the main screen. The total number of leads will be displayed in the pop-up's heading at this moment. Here you will find an index of leads containing information such as the lead's location, phone number, and SIC code.

In the following textbox, enter the quantity of leads that you wish to purchase. If you wish to buy five leads, then you should write 5 into the text box and then click the buy record button.
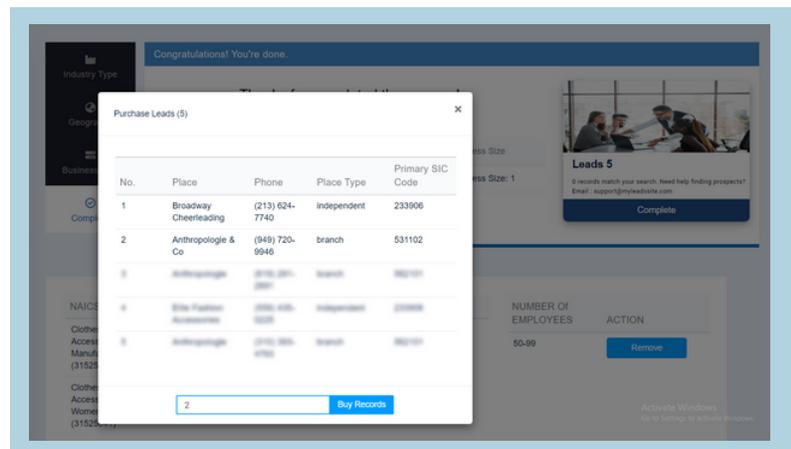
After that, you will see a popup that is named Terms and Conditions, and inside it will be written all of the terms and conditions. After that, click the checkbox that is given below. In addition, click on the button labeled "Agree and continue."
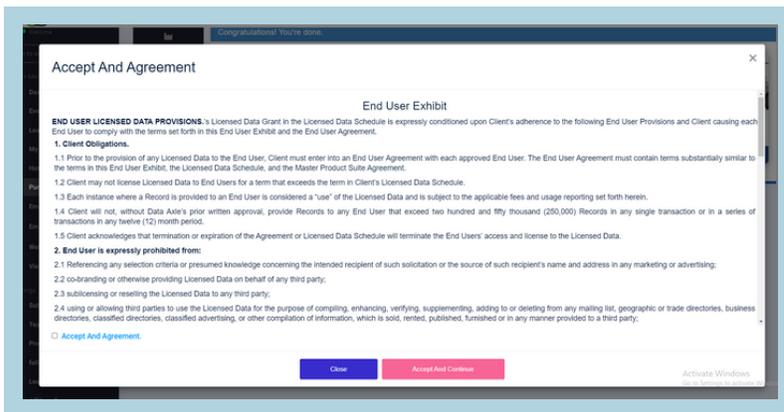
- After that, you'll be redirected to a page on PayPal that displays the total cost of the leads you've submitted along with the amount of leads.
- Click on PayPal button and enter your card details and buy leads.
- Following the completion of a lead purchase, a .CSV file will be download on your device.
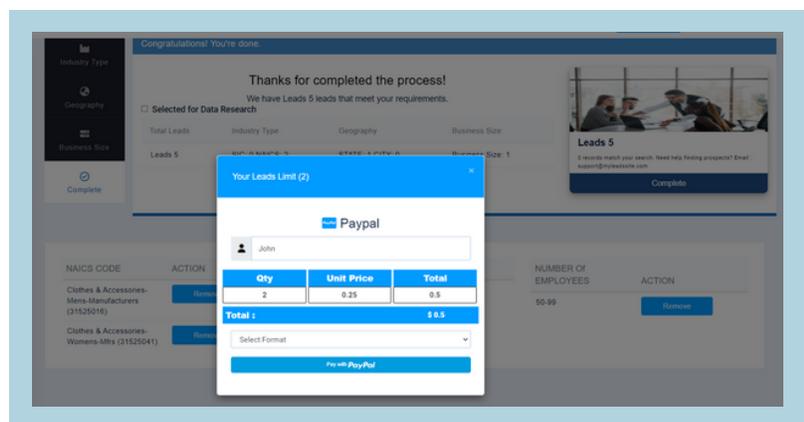
ADD EMAIL TEMPLATE

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.

Select	Event/Lead Group Name	Subject	Status
●	Applicable to all Events and Groups	Without Attachment template	YES
○	Applicable to all Events and Groups	Test Attachment	YES
○	Applicable to all Events and Groups	funky character	YES
○	Applicable to all Events and Groups	Char SP	YES

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.

- ■ 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

Email Campaign

NEW

This email campaign is targeted at MLeads users who are interested in improving their lead nurturing strategy. The subject line is clear and attention-grabbing, and the body of the email is short and to the point. The email also includes a call to action, encouraging recipients to visit the Help Center to learn more about the new feature.

- Go to your MLeads account and click on the "Email Campaigns" from sidebar menu.
- Click on the "Add Campaign" button.
- Enter a name for your campaign and select the leads you want to target. You can also choose how often you want to be sent emails, such as daily, weekly, or monthly.
- By pressing on the "Add More" button, you can add more than one template.
- Before running a campaign, you can view, modify, and delete it.
- Click on the "Run Campaign" button to launch your campaign.

Email Campaign

- After the campaign has been performed, it appears on the Email Campaign List
- You can look for your campaign by clicking on the "Filter" button, which gives you several choices, such as "Campaign Name", "Start Date", "End Date" and "Status."
- You can see your templates if you click on the Eye button. You can also add an existing template and change the name of Campaign.
- You can Pause, Stop and Start the campaign

Email Campaign

+ Add Campaign   ▼ Filter   🖹 Report

EMAIL CAMPAIGN LIST

Sr No.	Campaign Name				Start Date	End Date	Status	Action
1	Thank You	👁	✎	⊞	15 Jul 2023	17 Jul 2023	1 days left.	1 days left for the campai

	Event/Lead Group	Leads	Template	Date	Interval	Mail Per Day	Status	Action
	New MLeads 👁 ✎ 🗑	1 Leads Selected	Testing Purpose	Start: 15 Jul 2023 End: 17 Jul 2023	Daily	One Time In Day	Running	◉ ⏸

Sr No.	Campaign Name				Start Date	End Date	Status	Action
2	Marketing	👁	✎	⊞	12 Jul 2023	19 Jul 2023	Running	◉ ⏸
3	Follow Up	👁	✎	⊞	12 Jul 2023	19 Jul 2023	Paused	▶ ◉
4	My Campaign	👁	✎	⊞	20 Jul 2023	21 Jul 2023	6 days left.	6 days left for the campa
5	Welcome	👁	✎	⊞	05 Jul 2023	10 Jul 2023	Stopped	Please change date t

First ‹ 1 › Last

- You can view, modify and delete the templates.

Campaign Edit ✕

Campaign Information

Campaign Name *	Select Event/Group *	Select Leads *	Select Template *
Marketing	Social Apps Marketing	4 Lead Selected ▾	Marketing Template

Start Date *	End Date *	Interval *	Mail Per Day *
12/07/2023	19/07/2023	Daily	One Time in Day

Template Information

Subject

Marketing Template

Message

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

↶ ↷ | Formats ▾ | **B** *I* | ≡ ≡ ≡ ≡ | ≔ ▾ ≔ ▾ ⧉ ⧉ | 🔗

Hi [User],

We're excited to welcome you to the MLeas family!

Every single one of us is here to make sure you're happy with MLeads. Firstly, let's make sure your account is set up properly.

Watching our Onboarding Tutorial will help you familiarize yourself with MLeads. It covers how to complete your set up process, key features of your account, plus some handy tips and tricks.

Onboarding Tutorial Video

If you need any help at all, drop us a line anytime at support@myleadssite.com. We'll be more than happy to lend a hand!

Until next time

Email Campaign

By clicking on the "Report" button, you have access the campaign information. Here are the charts for the last seven days.

CAMPAIGN STATISTICS

REQUESTS	DELIVERED	OPENED	UNSUBSCRIBED	OTHER
0	0	8	0	0

■ Requests ■ Delivered ■ Open ■ Unsubscribe ■ Other

EMAIL ACTIVITY

Show 10 ∨ entries   Search: [   ]

Date	Requests	Delivered	Opened	Unsubscribed	Other
14 Jul 2023	0	0	0	0	0
13 Jul 2023	0	0	0	0	0
12 Jul 2023	0	0	0	0	0
11 Jul 2023	0	0	8	0	0
10 Jul 2023	0	0	0	0	0
09 Jul 2023	0	0	0	0	0
08 Jul 2023	0	0	0	0	0
07 Jul 2023	0	0	0	0	0

Showing 1 to 8 of 8 entries   Previous 1 Next

User may check total email requests, delivered emails, opened emails, and bounce emails of recent 7 days.

Email Campaign

A user can view a detailed report for a particular campaign by selecting Activity option from the side menu bar
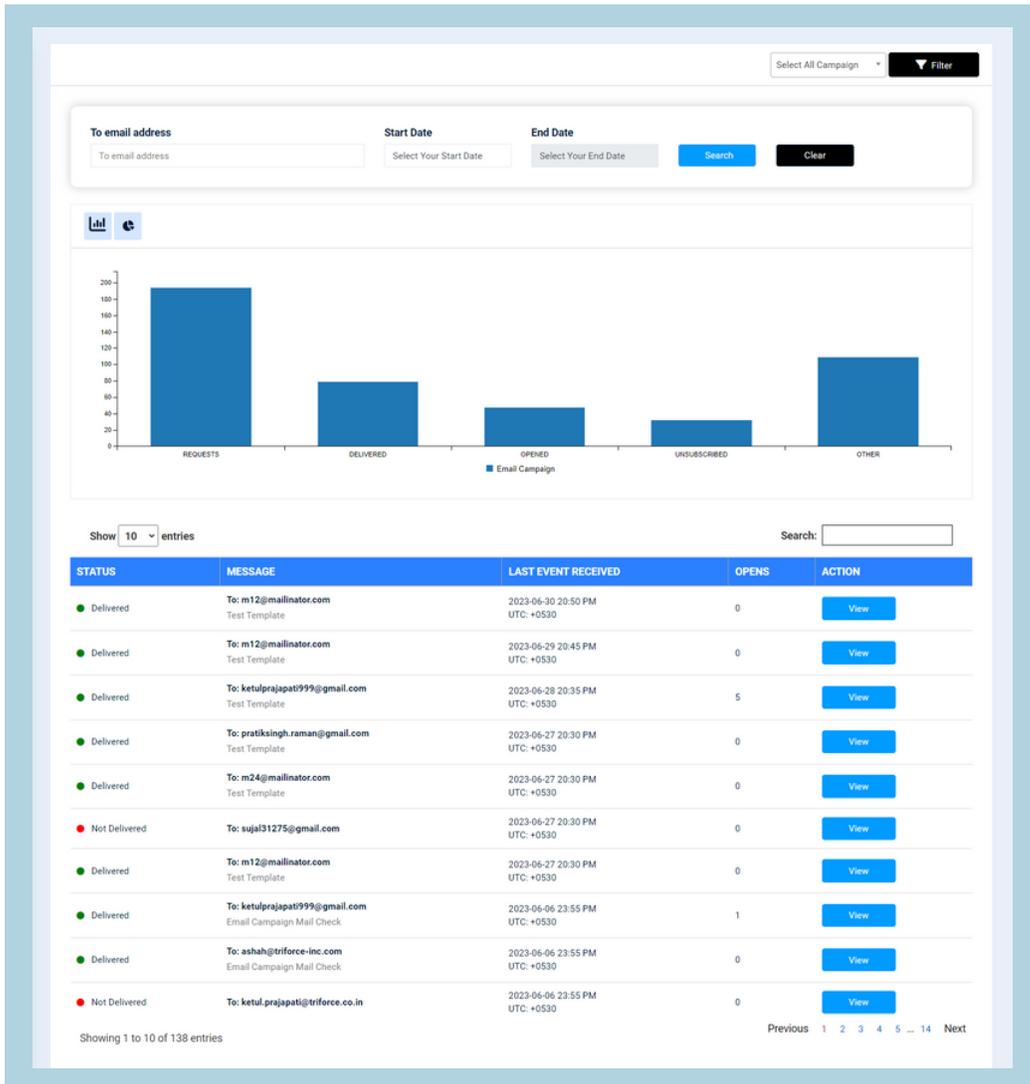
The user can select a specific campaign from a dropdown menu. Additionally, they can search the data by selecting the filter button.

The "View" button displays email information like event name, subject, delivered, not delivered, and reason for not delivered.
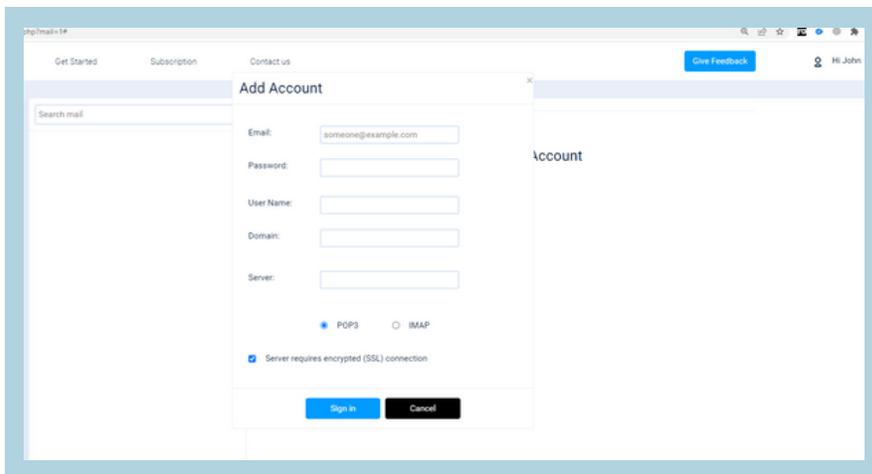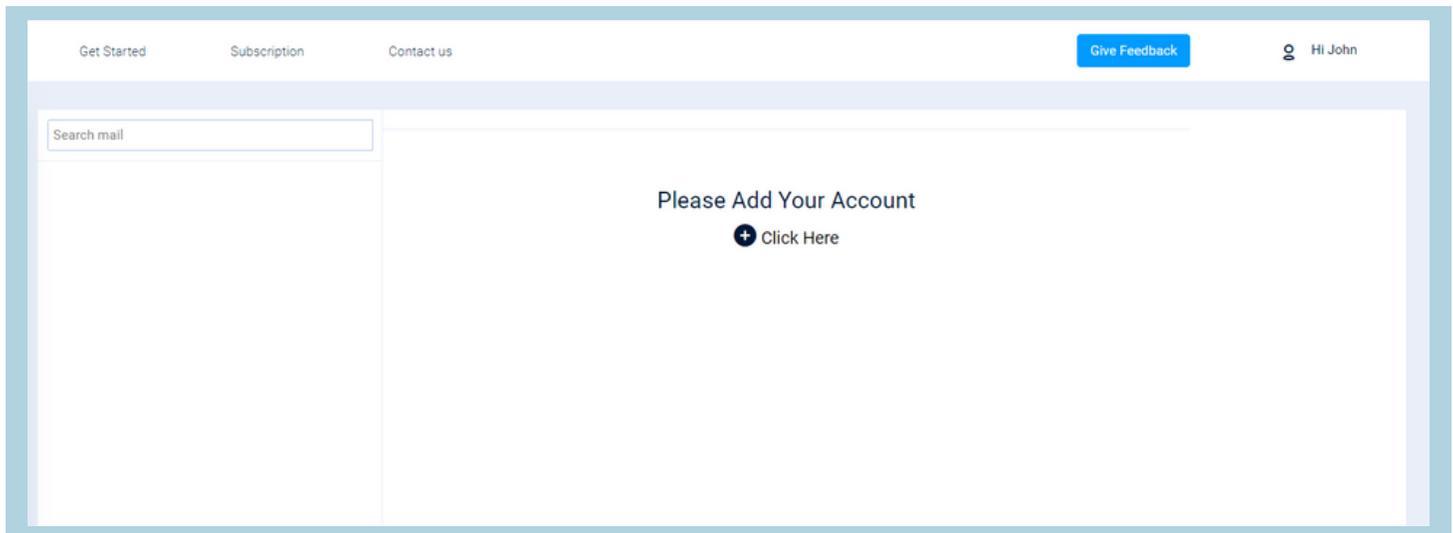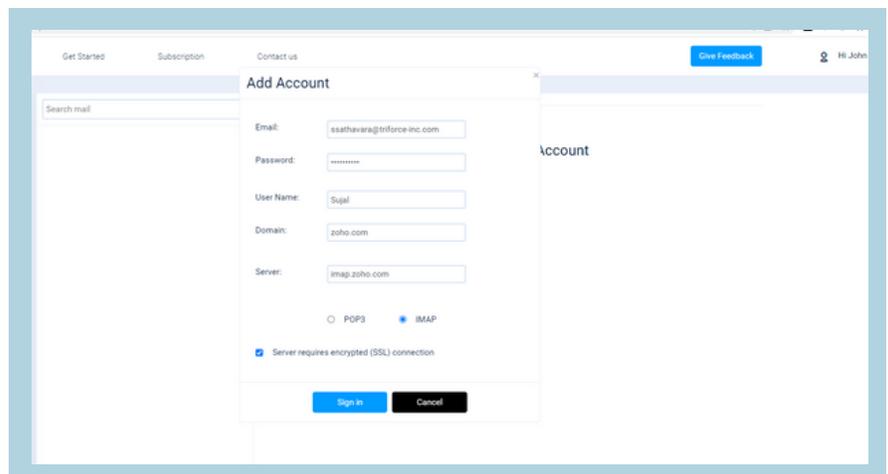
Webmail Integration

Integrating MLeads to email lets you view all relevant data in one place for improved lead management.

To integrate webmail, click the Webmail option in the left menu. Click on Create Account.

- Fill up the account information
- You can add account using either IMAP or POP3.

Webmail Integration

NEW

Webmail integration in MLeads allows users handle emails, track communications, and access contacts without switching apps.
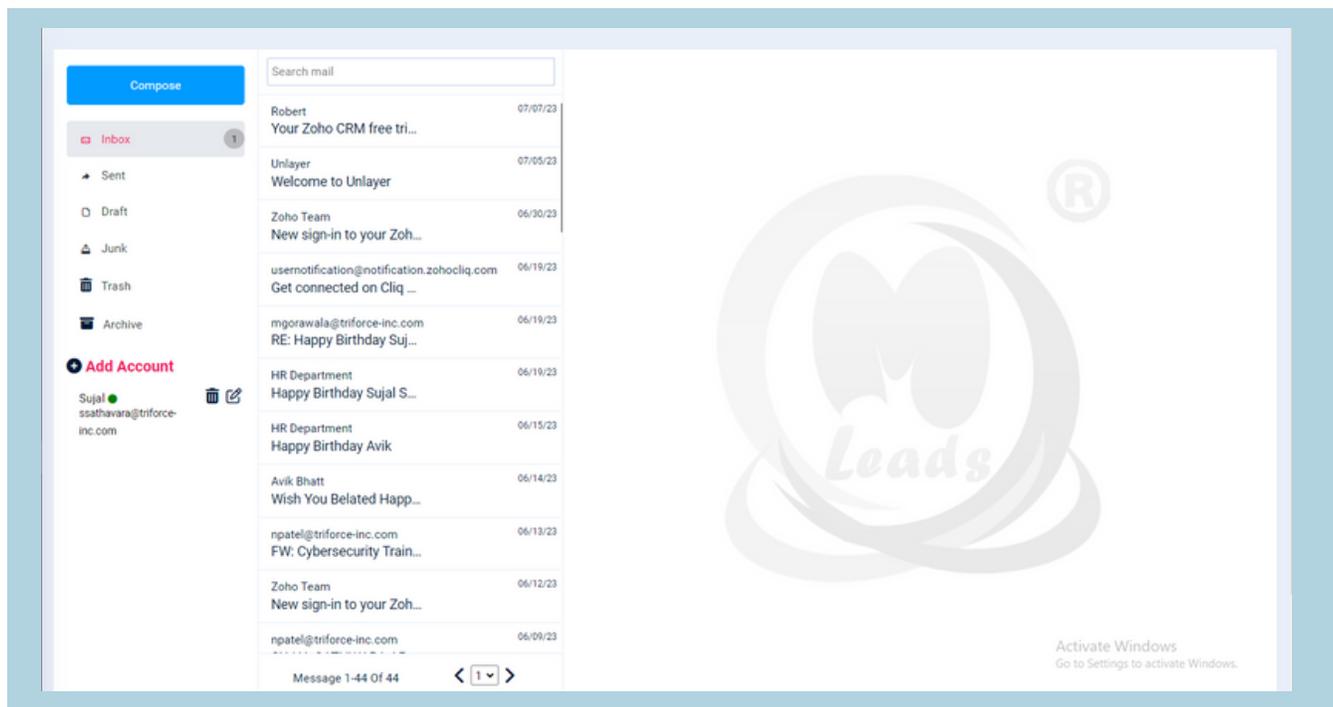
- After adding an account, you will be able to access all of your emails in the inbox.
- You are able to send emails with attachments using MLeads. You are able to reply and forward your email.
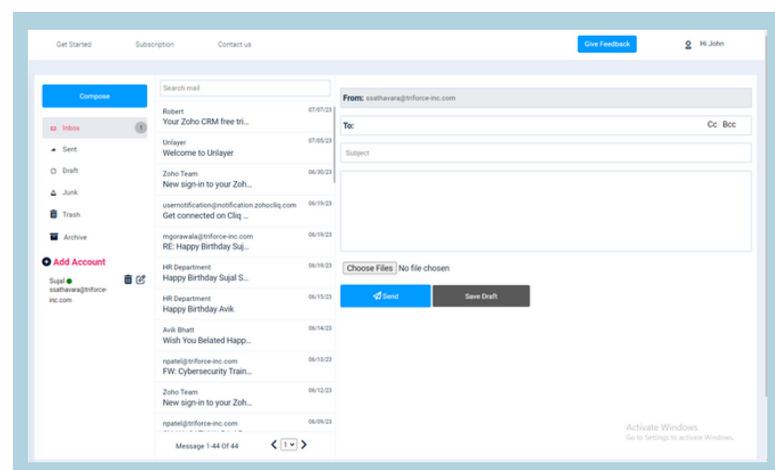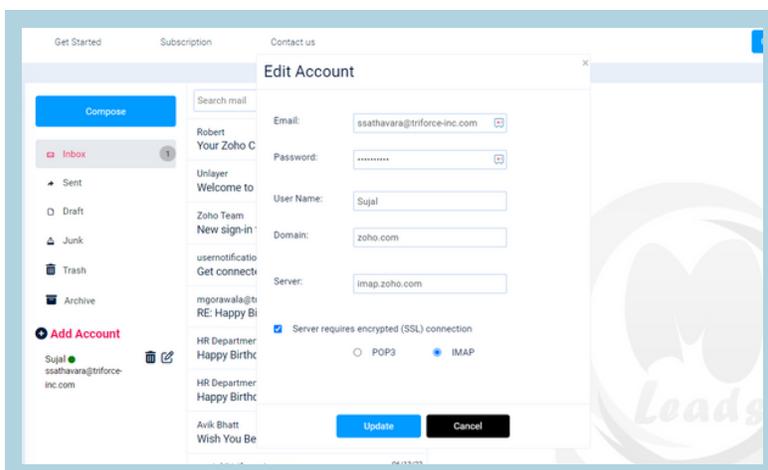
Add Team Member

Team Management

Add Team Member   Manage Team

Current Team Hierarchy - visibility to 3 levels. Click to Change
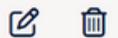
Customize Product Interest

Product Interests

Customize Product interests

Add

Product 1

Product 2

No Custom Products Found.

Customize Follow-up Action

Follow-Up Actions

System Follow-up actions

Call	
SMS	
Email	

Customize Follow-up actions

[Add]

Test		

Add Customize Lead Status

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]
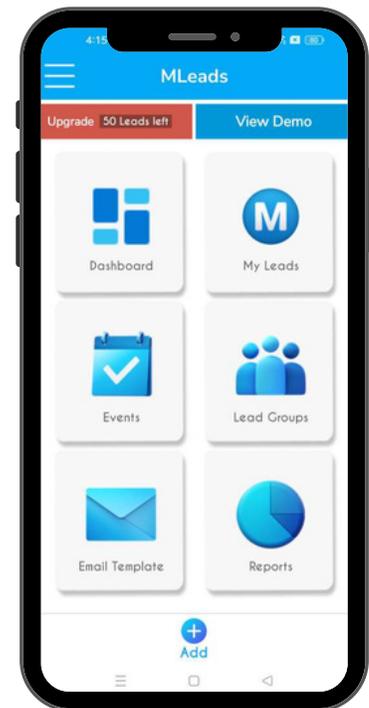
Test			

MLeads Support

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

MLeads

- Business Center, of Lansdale
  650 North Cannon Avenue,
  Lansdale, PA 19446

- Phone :(267)263-3178

- Fax: (267)-200-0026

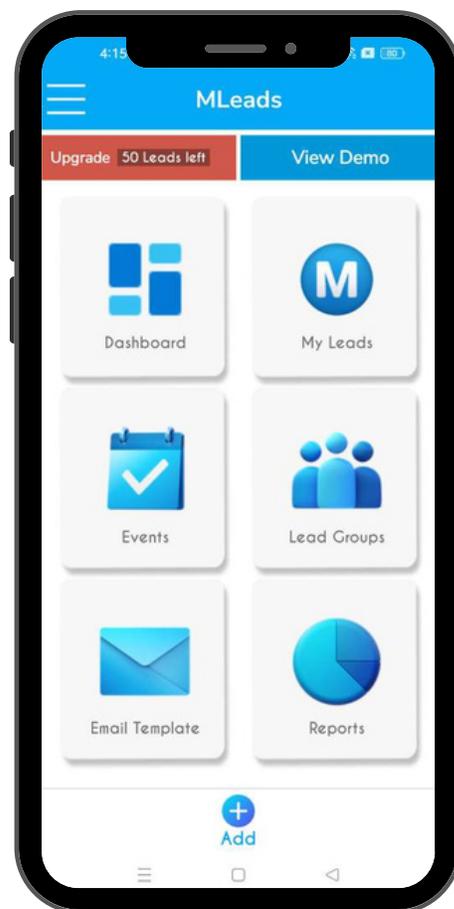- Email:
  info@myleadssite.com
  Support@myleadssite.com

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

- Resource-Center : https://www.myleadssite.com/faq.php

Special Thanks from MLeads

Get Free Account Now

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"**MLeads**"

Connect With Us

- MLeads