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Create a free account

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| <p>Create an Account. It's Free!</p> <p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Phone Number <input type="text"/></p> <p><input type="text" value="cklein@salesnexus.com"/></p> <p><input type="password" value="*****"/></p> <p>Confirm Password <input type="password"/></p> <p>Coupon <input type="text"/></p> <p><input checked="" type="checkbox"/> I agree to the LeadFerret terms</p> <p>Get Started</p> | <p>You will need to go through the setup of your account</p> <p>Click the Next button at the bottom of each page to set up your account.</p> <p>Once you are done, you can login and start to target contacts.</p> <p>ON the Search page you have multiple options to search by.</p> |
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| <p>1. Title</p> <p>Title <input type="text" value="Keyword"/> Starts With <input type="text"/> Level <input type="checkbox"/> C-level, Chief, CXO <input type="checkbox"/> Vice President <input type="checkbox"/> Director <input type="checkbox"/> Manager <input type="checkbox"/> Other, Sub-Manager</p> | | <p>2. Name and Gender</p> <p>First Name <input type="text"/> Last Name <input type="text"/> Gender <input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Any</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>3. Department or Profession</p> <table border="0"> <tr> <td><input type="checkbox"/> Administrative</td> <td><input type="checkbox"/> Engineering</td> <td><input type="checkbox"/> Mortgage Broker</td> <td><input type="checkbox"/> Purchasing</td> </tr> <tr> <td><input type="checkbox"/> Admissions</td> <td><input type="checkbox"/> Financial</td> <td><input type="checkbox"/> Network</td> <td><input type="checkbox"/> Real Estate Agent</td> </tr> <tr> <td><input type="checkbox"/> Assistant</td> <td><input type="checkbox"/> HelpDesk</td> <td><input type="checkbox"/> Nurse</td> <td><input type="checkbox"/> Research</td> </tr> <tr> <td><input type="checkbox"/> Business Development</td> <td><input type="checkbox"/> IT/Technology</td> <td><input type="checkbox"/> Operations</td> <td><input type="checkbox"/> Sales</td> </tr> <tr> <td><input type="checkbox"/> Buyer</td> <td><input type="checkbox"/> HR(Human Resources)</td> <td><input type="checkbox"/> Photographer</td> <td><input type="checkbox"/> Scientist</td> </tr> <tr> <td><input type="checkbox"/> Certified Financial Planner</td> <td><input type="checkbox"/> Lawyer</td> <td><input type="checkbox"/> Physician/Doctor</td> <td><input type="checkbox"/> Sourcing</td> </tr> <tr> <td><input type="checkbox"/> CPA/Accountant</td> <td><input type="checkbox"/> Learning</td> <td><input type="checkbox"/> Procurement</td> <td><input type="checkbox"/> Supply Chain</td> </tr> <tr> <td><input type="checkbox"/> Creative</td> <td><input type="checkbox"/> Librarian</td> <td><input type="checkbox"/> Product</td> <td><input type="checkbox"/> Telecom</td> </tr> <tr> <td><input type="checkbox"/> Customer</td> <td><input type="checkbox"/> Marketing</td> <td><input type="checkbox"/> Professor</td> <td><input type="checkbox"/> Top (CEO, President, Owner, Partner...)</td> </tr> <tr> <td><input type="checkbox"/> DBA</td> <td><input type="checkbox"/> MIS</td> <td><input type="checkbox"/> Project Manager</td> <td><input type="checkbox"/> Training</td> </tr> </table> | | | | <input type="checkbox"/> Administrative | <input type="checkbox"/> Engineering | <input type="checkbox"/> Mortgage Broker | <input type="checkbox"/> Purchasing | <input type="checkbox"/> Admissions | <input type="checkbox"/> Financial | <input type="checkbox"/> Network | <input type="checkbox"/> Real Estate Agent | <input type="checkbox"/> Assistant | <input type="checkbox"/> HelpDesk | <input type="checkbox"/> Nurse | <input type="checkbox"/> Research | <input type="checkbox"/> Business Development | <input type="checkbox"/> IT/Technology | <input type="checkbox"/> Operations | <input type="checkbox"/> Sales | <input type="checkbox"/> Buyer | <input type="checkbox"/> HR(Human Resources) | <input type="checkbox"/> Photographer | <input type="checkbox"/> Scientist | <input type="checkbox"/> Certified Financial Planner | <input type="checkbox"/> Lawyer | <input type="checkbox"/> Physician/Doctor | <input type="checkbox"/> Sourcing | <input type="checkbox"/> CPA/Accountant | <input type="checkbox"/> Learning | <input type="checkbox"/> Procurement | <input type="checkbox"/> Supply Chain | <input type="checkbox"/> Creative | <input type="checkbox"/> Librarian | <input type="checkbox"/> Product | <input type="checkbox"/> Telecom | <input type="checkbox"/> Customer | <input type="checkbox"/> Marketing | <input type="checkbox"/> Professor | <input type="checkbox"/> Top (CEO, President, Owner, Partner...) | <input type="checkbox"/> DBA | <input type="checkbox"/> MIS | <input type="checkbox"/> Project Manager | <input type="checkbox"/> Training |
| <input type="checkbox"/> Administrative | <input type="checkbox"/> Engineering | <input type="checkbox"/> Mortgage Broker | <input type="checkbox"/> Purchasing | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Admissions | <input type="checkbox"/> Financial | <input type="checkbox"/> Network | <input type="checkbox"/> Real Estate Agent | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Assistant | <input type="checkbox"/> HelpDesk | <input type="checkbox"/> Nurse | <input type="checkbox"/> Research | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Business Development | <input type="checkbox"/> IT/Technology | <input type="checkbox"/> Operations | <input type="checkbox"/> Sales | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Buyer | <input type="checkbox"/> HR(Human Resources) | <input type="checkbox"/> Photographer | <input type="checkbox"/> Scientist | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Certified Financial Planner | <input type="checkbox"/> Lawyer | <input type="checkbox"/> Physician/Doctor | <input type="checkbox"/> Sourcing | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> CPA/Accountant | <input type="checkbox"/> Learning | <input type="checkbox"/> Procurement | <input type="checkbox"/> Supply Chain | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Creative | <input type="checkbox"/> Librarian | <input type="checkbox"/> Product | <input type="checkbox"/> Telecom | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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If you are not sure which area will give you what you want click on the ? located to the right of the filed choice, it will give you a pop up box

This will return contacts with the word "administrative" or "administrator" found in their title. Usually found in government or education.

9. Radius

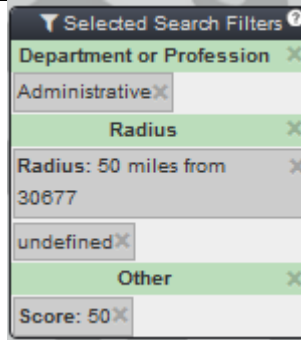
Center

Radius

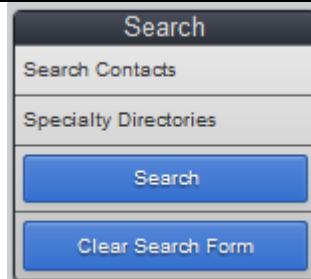
Sort by ☒ Distance

If you want to search by zip code you can go to section 9 and put in your zip code. The Radius button will allow you to expand from the center of that zip code to surrounding areas. If your zip code is not as wide as your radius, it will pick up other zip codes

It will return the results with in the radius you put in. To the right you will see your search results under Selected Search Filters.



When you have your criteria where you want it, click on Search to find your contacts



When your search finishes, you will see a list of contacts. These are your targeted contacts.

| <input type="checkbox"/> First Name | Last Name | Title |
|---|-------------|--------------------------------------|
| <input type="checkbox"/> Erik | Guggenheim | Marketing Director, Sales |
| <input checked="" type="checkbox"/> Kevin | Kutcher | Director Corporate Marketing |
| <input type="checkbox"/> Kathryn | Mujezinovic | Vice President, Business Development |
| <input type="checkbox"/> Michael | Rowell | Director of Marketing |

To pick the ones you want to transfer, check the box in front of the first name for the ones you want to transfer. To pick all of them check the box across from the label First Name

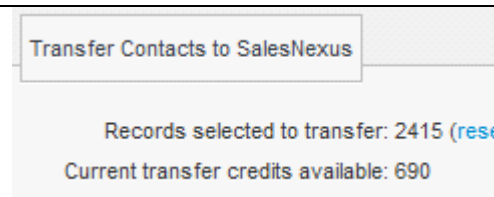


Once you checked the targeted contacts you want to transfer, click on the button that is now an option labeled **Transfer Selected to SalesNexus**



You can also choose to move a numbered amounts of counts by putting an amount into the field labeled Transfer First XXX To SalesNexus

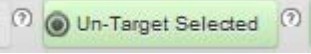
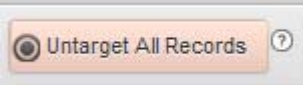
This will bring you to the transfer screen



The top of the screen shows the number of records selected for transfer and the number of transfer credits available. You have 500 credits per every 30 days. Your credits will be given back at the 31'st day after the transfer of that amount. If you transferred 200 contacts on the 14th of the month, you will get those credits back on the 15th of the next month (30 days later)

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| <p>Records selected to transfer: 0 (reset) Current transfer credits available: 690 Total Transferable contacts: 0</p> <div> <div>Targeted Contacts</div> <div>SalesNexus Transfer</div> <div>Salesnexus Transfer Reports</div> </div> | <p>If the Section Records Selected to transfer is at zero (0), you have NO contacts selected to transfer.</p> <p>Click on the button to the Left that says Targeted Contacts to select contacts to transfer</p> |
| <p>Would you like to use 863 points to transfer 1725 additional contacts? <input type="checkbox"/> Yes, use 863 points towards my transfer</p> <p>Total Transferable contacts: 690</p> <p>Database: <input type="text" value="training"/></p> <p>Username: <input type="text" value="Sn Admin"/></p> <p>Password: <input type="password" value="*****"/></p> <p><input type="button" value="Transfer"/></p> | <p>The bottom Left section shows your SalesNexus connection. The Database name is the name of your database. You will find this between the slashes (/) of your URL after the logon.SalesNexus/ part. You will need to supply your SalesNexus User name and password. If this is the first time you have used the transfer, you may have to contact Support@leadferret.com or the chat button for Leadferret to have your account Authenticated.</p> |
| <div> <div>Transfer Status</div> <div> Verifying Database, Username and Password... </div> <div><input type="button" value="Close"/></div> </div> | <p>Once you click the transfer button a pop up window will appear showing the verification of your database, username and password. This is within the Leadferret system. You have given the Leadferret system permission to access your database and it must verify your credentials.</p> |
| <div> <div>Transfer Status</div> <div> <div> <input checked="" type="checkbox"/> Salesnexus account SNL is valid. <input checked="" type="checkbox"/> Records Prepared. </div> <div> <div>100%</div> </div> <div> Successful Transfers: 0 Duplicate Records: 1 Remaining Time: Completed Current Contact: </div> <div> <input type="button" value="Close"/> <input type="button" value="Continue"/> </div> </div> </div> | <p>Once your database is verified, you will see the transfer status change to show the movement of contacts</p> <p>This window Shows you how many new contacts you transferred and now many contacts were already in your system that were in your contacts to transfer list.</p> |
| <div> <div>Targeted Contacts</div> <div>SalesNexus Transfer</div> <div>Salesnexus Transfer Reports</div> </div> | <p>Once your contacts have been transferred, you need to remove them from the Targeted Contact list. Close the window, click on the button to the left that says Targeted Contacts</p> |
| <p>In your list of contacts you will now see some marked in Orange. You can remove them from the list or you can simply hide them from your next download.</p> | |

| <input checked="" type="checkbox"/> | First Name | Last Name | Title |
|-------------------------------------|------------|-------------|--------------------------------------|
| <input checked="" type="checkbox"/> | Erik | Guggenheim | Marketing Director, Sales |
| <input checked="" type="checkbox"/> | Kevin | Kutcher | Director Corporate Marketing |
| <input checked="" type="checkbox"/> | Kathryn | Mujezinovic | Vice President, Business Development |
| <input checked="" type="checkbox"/> | Michael | Rowell | Director of Marketing |
| <input checked="" type="checkbox"/> | Forbes | Durdin | Director Of Sales And Training |
| <input checked="" type="checkbox"/> | Jill | Brown | Director of Corporate Marketing |
| <input checked="" type="checkbox"/> | Jessica | Molinari | Director-Marketing |

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|  | <p>To remove them from the list of Targeted contacts:</p> <p>If the full page is orange, you can quickly remove them all by clicking on the check box next to first name and then click the button that says Un Target selected , This will remove all that you have checked from your Targeted Contacts. They will not interrupt your next transfer.</p> |
| <p>Exclude</p> <p><input type="checkbox"/> Targeted Contacts ?</p> <p><input type="checkbox"/> Contacts Already Downloaded ?</p> <p><input checked="" type="checkbox"/> Contacts Transferred to Salesnexus</p> | <p>To Hide the contacts already transferred:</p> <p>In the area called 10. Other, there is a Section called Exclude. Make sure to check the box next to Contacts Transferred to SalesNexus. Now when you transfer the next set, it bypasses those already marked Orange.</p> |
|  | <p>If all your contacts are Orange, you can quickly remove them all from your targeted list by clicking on Untarget All Records. This will remove ALL your targeted records so you only want to click that button when you are sure you have them all.</p> |

To find your contacts in SalesNexus

Once you have transferred your contacts, log into your SalesNexus, go to the look up page, now go to advances search. You want to create a search to find these contacts you put on your marketing campaign

Put in this criteria for your search:

Leadsource = Leadferret - All leads coming in from Leadferret will have this as the lead source

Create Date >= 12/05/2013 – This is a Greater than search, this allows you to have a start date of transfer

Create Date <= 12/06/2013 - This is a less than search, this allows your stop date for the transfer

Now click Search, this will bring up all contacts that meet this criteria.

To save this search to make it easier next time, click the word save at the top

My Searches: [Load](#) | [Save](#) | [Delete](#)

It will save this search in your My Searches, simply click the down arrow and pick your search, then pick load to apply it. Change the date for your new search and click Search again.

To Start your Campaign

Once you have created your Advance search, click on the Magnifying glass next to one of the names, this will open up that contact.



From within any contact, click on Add to campaign

REPORTS | CAMPAIGN | GROUPS

[Rule](#) | [Send Email](#) | [Add To Campaign](#) | [Log Cal](#)

Main Contact

This will bring up your database campaigns to choose from

If you do not see the campaign you are looking for, uncheck My Campaigns only and check Alphabetically for the full list of campaigns

Select An Existing Campaign:

sort: ☒ Recently Used ☐ Alphabetically ☒ My Campaigns Only



- 1-New Prospect Campaign
- 1-Blitz Campaign**
- 1-Blitz Campaign
- 1-Free Two Week Trial Blitz
- 1-Blitz Campaign NEW
- Give your Employees That Great Cup of Coffee They Are Asking For
- Call to Schedule Face to Face
- A Great Tasting Coffee can be a Great Te

To the left you will see the workflow for the campaign you have selected. In this workflow you have several choices. You want to turn on Click Notification if there is a link in the template that you want to know when they click it. This will give you a task in your Task list every time a contact clicks on a link. Open notification will give you a task every time a contact Opens a template. Click notification is a better choice as it gives you who has become a warm contact, one who has shown an interest.

Work Flow Activities:

Clicking **Add To Campaign** will apply changes below to these contacts only.
Go to **Manage Work Flows** to make permanent changes.

| Type | After Start Date | Regarding | Tracking | Open Notification | Click Notification | User |
|--------|------------------|--------------------------------|-------------------------------------|-------------------------------------|--------------------------|----------------|
| E-mail | 1 Days | Give your Employees That Great | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Contact's Reco |
| E-mail | 0 Days | A Great Tasting Coffee Can Be | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Contact's Reco |
| Call | 0 Days | Call to schedule face to face | | | | Contact's Reco |
| E-mail | 3 Days | A Great Tasting Coffee Can Be | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Contact's Reco |

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| <p>Start Date:</p> <div> <input type="text" value="12/9/2013"/> <input type="text" value="5:28 AM"/>  </div> <p>Schedule With These Contacts:</p> <p> <input checked="" type="radio"/> Current Contact (SN Admin) <input type="radio"/> Current Lookup (no lookup established) <input type="radio"/> In This Group: <div> <input type="text"/>  </div> </p> <p>Add To Campaign</p> | <p>Change the radio button from Current Contact to Current Look up and the contacts you selected will be set to get the emails when you select Add to Campaign</p> <p>You can change the Start date of the campaign if you want them to go out in the future.</p> <p>You have successfully launched your campaign for those contacts. You will know it was successful when the workflow disappears.</p> <p>Now you can click on View Contact to go back to the contact you were on.</p> |
|---|---|