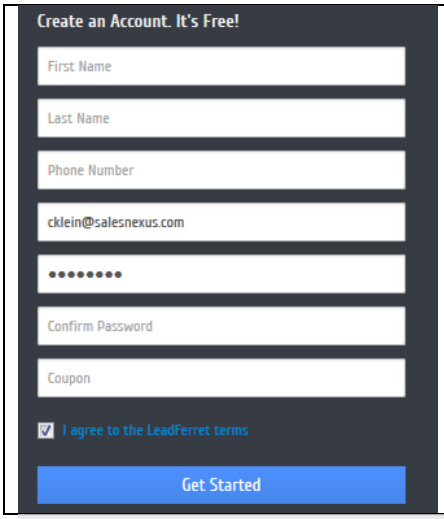
How to Use Leadferret

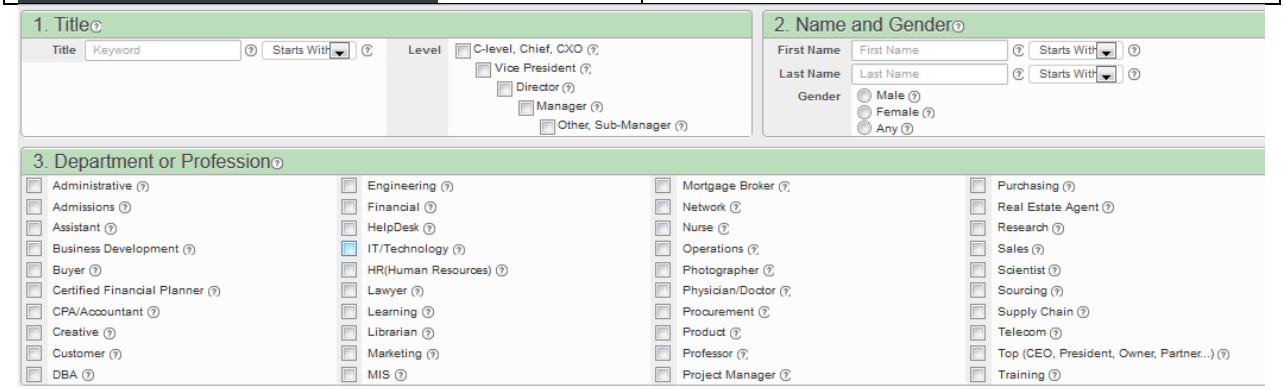
SalesNexus Online CRM and Email Marketing

Go to www.leadferret.ocm

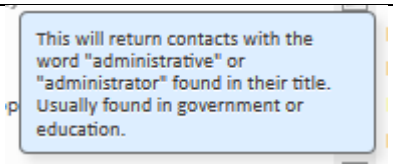
Create a free account



You will need to go through the setup of your account
Click the Next button at the bottom of each page to set up your account.
Once you are done, you can login and start to target contacts.
ON the Search page you have multiple options to search by.

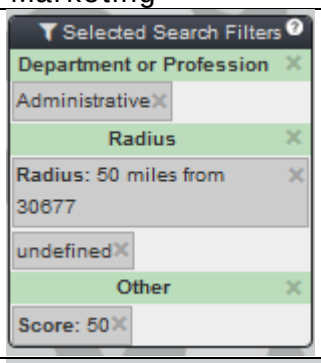


If you are not sure which area will give you what you want click on the ? located to the right of the filed choice, it will give you a pop up box

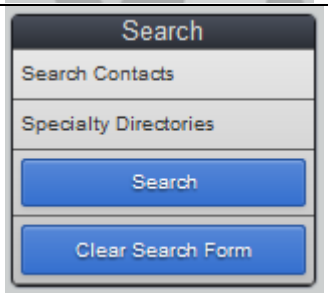


If you want to search by zip code you can go to section 9 and put in your zip code. The Radius button will allow you to expand from the center of that zip code to surrounding areas. If your zip code is not as wide as your radius, it will pick up other zip codes

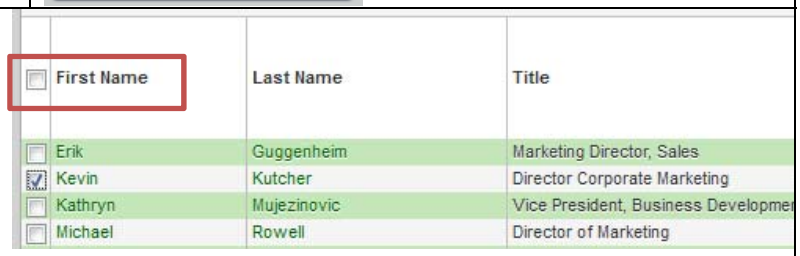
It will return the results with in the radius you put in. To the right you will see your search results under Selected Search Filters.



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

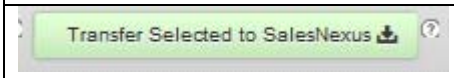


When your search finishes, you will see a list of contacts. These are your targeted contacts.



First Name	Last Name	Title
Erik	Guggenheim	Marketing Director, Sales
Kevin	Kutcher	Director Corporate Marketing
Kathryn	Mujezinovic	Vice President, Business Developmer
Michael	Rowell	Director of Marketing

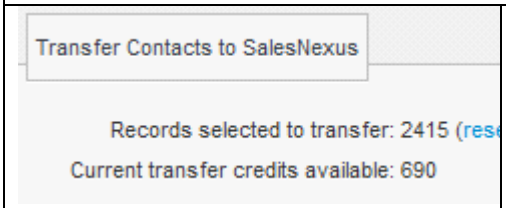
To pick the ones you want to transfer, check the box in front of the first name for the ones you want to transfer. To pick all of them check the box across from the label First Name



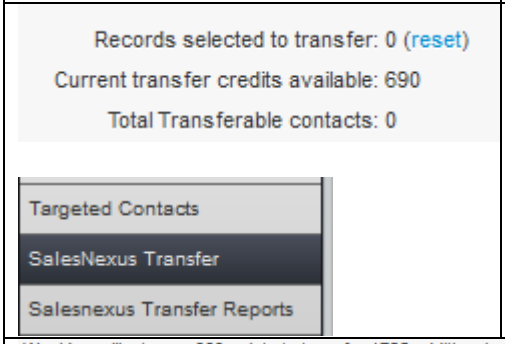
Once you checked the targeted contacts you want to transfer, click on the button that is now an option labeled **Transfer Selected to SalesNexus**

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

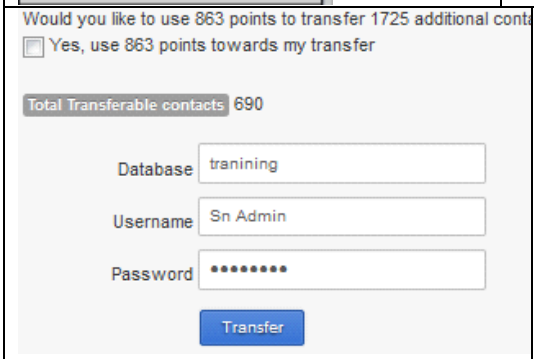


The top of the screen shows the number of records selected for transfer and the number of transfer credits available. You have 500 credits per every 30 days. Your credits will be given back at the 31'st day after the transfer of that amount. If you transferred 200 contacts on the 14th of the month, you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

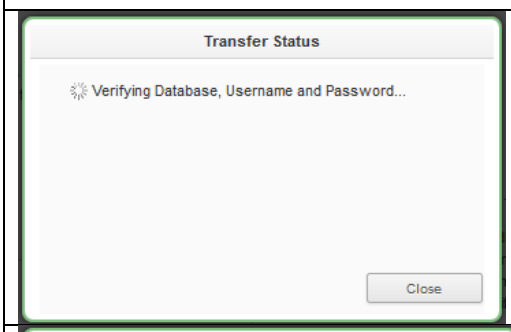


If the Section Records Selected to transfer is at zero (0), you have NO contacts selected to transfer.

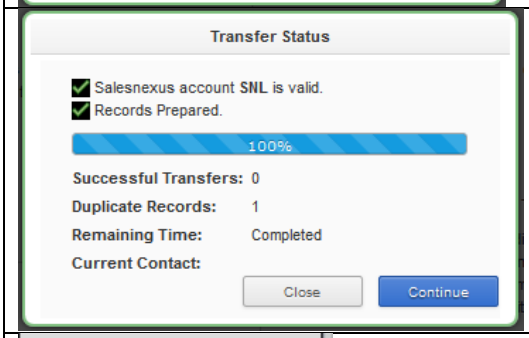
Click on the button to the Left that says Targeted Contacts to select contacts to transfer



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.

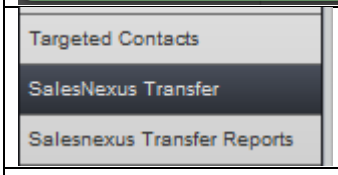


Once you click the transfer button a pop up window will appear showing the verification of your database, username and password. This is within the Leadferret system. You have given the Leadferret system permission to access your database and it must verify your credentials.



Once your database is verified, you will see the transfer status change to show the movement of contacts

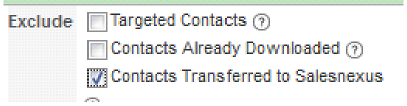
This window Shows you how many new contacts you transferred and now many contacts were already in your system that were in your contacts to transfer list.



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

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.

☑	First Name	Last Name	Title
☑	Erik	Guggenheim	Marketing Director, Sales
☑	Kevin	Kutcher	Director Corporate Marketing
☑	Kathryn	Mujezinovic	Vice President, Business Development
☑	Michael	Rowell	Director of Marketing
☑	Forbes	Durdin	Director Of Sales And Training
☑	Jill	Brown	Director of Corporate Marketing
☑	Jessica	Molinari	Director-Marketing

	To remove them from the list of Targeted contacts: 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.
 Exclude ☐ Targeted Contacts ☐ Contacts Already Downloaded ☑ Contacts Transferred to Salesnexus	To Hide the contacts already transferred: 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.
	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.

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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.

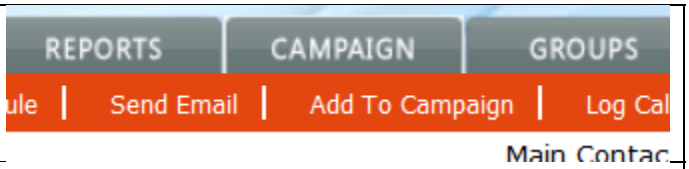
To save this search to make it easier next time, click the word save at the top

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

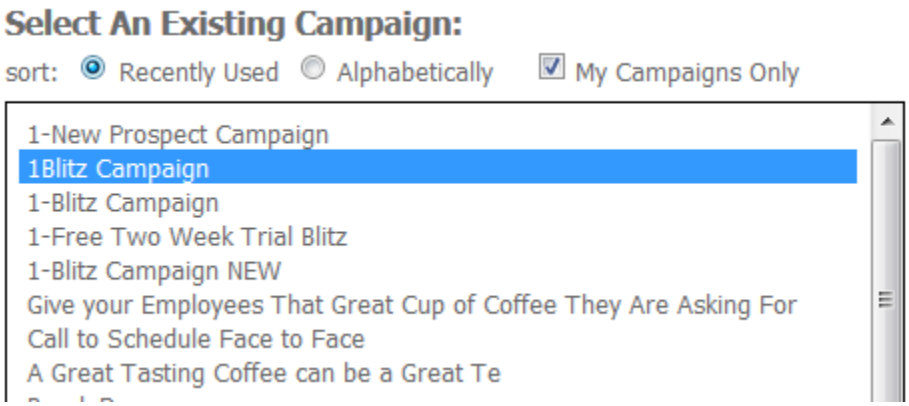
Once you have created your Advance search, click on the Magnifying glass next to one of the names, this will open up that contact.

From within any contact, click on Add to campaign

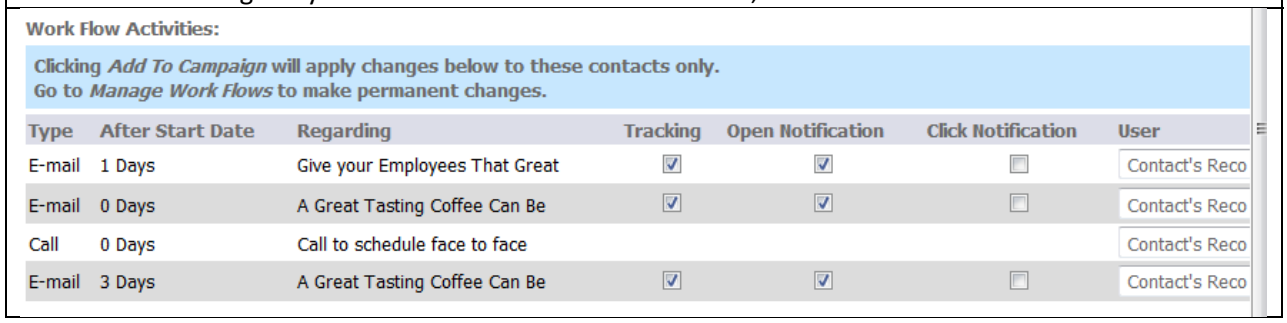


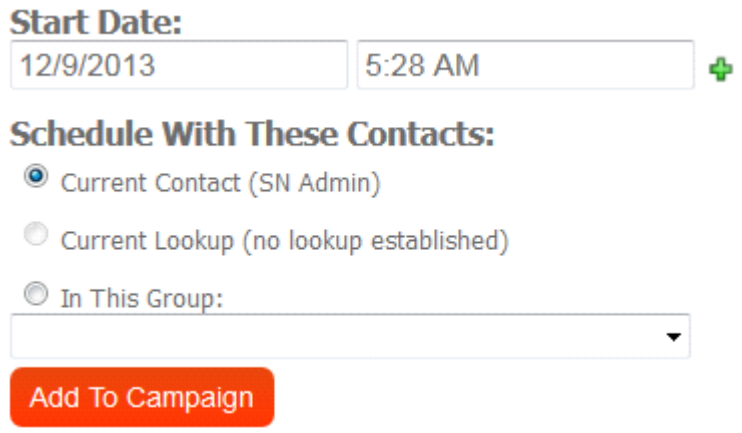
This will bring up your database campaigns to choose from

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



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.



	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 You can change the Start date of the campaign if you want them to go out in the future. You have successfully launched your campaign for those contacts. You will know it was successful when the workflow disappears. Now you can click on View Contact to go back to the contact you were on.