Move Opportunities through the Sales Pipeline using the Customer Relationship Management App

Move Opportunities through the Sales Pipeline

!! STOP. *Before reading this article, we recommend that you Read CRM -1 The Leads.*

Introduction:

The Customer Relationship Management App is a robust tool designed to support Brokers and Sales Agents from the first contact of a prospective buyer through to the closing of a home. With the Customer Relationship Management App, you can:

- **Collect, manage, forecast, qualify, communicate with, and add opportunities to your Leads.** Go to CRM 1- Leads
- **Move Opportunities through the Sales Pipeline to win deals and process a transaction.** Described in this Article
- **Make your sales efforts more efficient by allowing you to create tasks, schedule appointments, organize reminders, and communicate 1 to 1 with your clients while keeping all of your client's information and documents organized, handy and secure.** Go to CRM 3 - Organize your Calendar

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Gildie Nazari

CRM 2- The Sales Pipeline

Table of Contents: In this article, we cover:

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Define Your Email Settings

Add Custom Opportunity and Custom Task Fields

Configure your Meeting or Appointment Settings

Configure your Meeting or Appointment Reminders and the Appointment Booking Widget

Contacts Data Management

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Get Started

1. **Launch the Customer Relationship Management App (CRM)**

    1.1. Go to the project's **Workplace**
    1.2. Under the **Customer & Transaction Management** section**,** find the **Customer Relationship Management App** (CRM)
    1.3. **Click** on it

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My Work Day Dashboard

Intro: My **Work Day Dashboard** is the CRM's **Homepage**. This dashboard provides a bird's eye view of your sales activity and workload.

‼ ***The dashboard will be Empty until…***
you begin acquiring Leads and engaging with them. Use any of These Options.

As soon as you acquire leads, your dashboard will show the following information:

Leads at a Glance

- Total Leads *(The total number of Leads Independent of their Lead Score)*
- Total Active Leads *(The total number of Leads with a Lead Score of 4 or More)*
- Total Active Opportunities *(Total number of Opportunities in the Sales Pipeline)*
- Total Unsubscribed (*(Total number of Potential Leads that have unsubscribed from the project)*

Tasks and Appointments at a Glance:

- Task Details *(A summary of your Completed Tasks)*
- Appointments by Month, Week, or Day *(A summary of the Appointments for the Month, Week, or Day)*
- Task Status *(by Month, Week or Day)*
- Closed Deals *(by This month, Last Month, Last Quarter, This Week, or Today)*

‼ ***Do you want to learn more about Collecting and Managing Leads?*** *Read CRM-1*

‼ ***Do you want to learn how to organize your day with Bildhive?*** *Read CRM-3*

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CRM's Main Navigation Options

On the **Left Side** of the screen, you can find the **Main or Left Navigation Bar**. Use it to switch between the following sections:

- **My Work Day.** *This is the **Homepage** and it provides you with a bird's eye view of your **Sales Activity** and **Workload**.*

- **Leads.** *Select this option to see a list of all your **Leads** with details about each one.*

- **Opportunities.** *Select this option to go to your **Sales Pipeline**. Click **Archived** from the submenu, to open your **Archived Opportunities**.*

- **Email.** *Select this option to go to your **Inbox** where you can read your emails or compose new ones. Click **Sent** from the submenu, to navigate to your **Sent Emails**.*

- **Calendar**
  *Select this option to view a calendar with your **Tasks**, **Appointments,** and **Closing Dates** for your **Opportunities**.*

- **Tasks**
  *Select this option to see a list of all your **Active** tasks. Select **Completed** from the submenu, to view your **Completed Tasks**.*

- **Appointments** *Select this option to **Schedule Virtual Meetings**, **Phone Meetings,** or **Sales Center Visits** with your contacts.*

- **Settings.** *Select this option to:*
  - ***Integrate** to your **Email Account**, **Create Email Signatures** and **Templates**, and Add **Custom Fields** to your **Lead List**, **Sales Pipeline,** and **Task List.***
  - ***Configure** your **Meeting Settings** as well as allow prospective users to **schedule meetings DIRECTLY** from your **Website** or **Landing page.***
  - ***Import or Export Data, Bulk Delete Data,** and view **Data History.***

!! STOP*. Make Sure to Connect to Your Email Account.*
*To see your **Emails** or schedule **Appointments**, you need to **Integrate** with your **Email Account**. Follow These Steps.*

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Connect to your Email Account using the Integrations Tab

2. **Connect to your Email Account Using the Integrations Tab**

   ‼ ***Connecting to your Email Account is NOT mandatory, BUT,***
   *Connecting enables you to send **Emails** to your contacts and **Schedule Appointments Directly** from your **CRM** app. It also allows prospective users to **Set-up Meetings DIRECTLY** from your **Website** or **Landing pages**.*

   2.1. To connect to your **Email Account**, go to the **Left Navigation Bar** and select **Settings**
   2.2. On the **Settings Submenu,** under **Email & Calendar Settings,** select **Integrations**
   2.3. In the **Email Accounts** section**,** select the **Email Account** of your preference and click **Sign in**
   2.4. You **MUST Allow** Bildhive to **Connect** to your account
   2.5. This will bring you back to the **Email Accounts Window** and the **Status** will appear as **Connected**
   2.6. To disconnect from your email account, click **Disconnect**

   ‼ ***The Connection will remain Active until you choose to Disconnect. It doesn't matter if you Exit the Project and return at a Later Time.***

   ‼ **TIP:** ***Do you have a team of Independent Sales Agents working together on a project?***
   *It is **Recommended** that **ALL** members integrate with the **Sales Center's Email Address** as opposed to each one using their own. This integration ensures **Visibility** for the **Entire** team, allowing **Management** to **Oversee** all interactions and keeping the **History of Correspondence** in one place.*

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3. **Connect to your Video Conferencing Account**

    3.1. Once you Connect to your Email Account, the **Zoom Video Conferencing Section** displays below the **Email Accounts** section
    3.2. As long as you have a Zoom **Account, u**se this section to connect to it

‼️ ***There are other options for Virtual Appointments besides Zoom.***

- *If you use **Gmail**, you are **Automatically** connected to **Google Meet***
- *If you use **Office 365,** you are **Automatically** connected to **Teams***
- *If you use **Outlook**, you can **ONLY** use **Zoom***

The Sales Pipeline

Intro: The Sales Pipeline is at the center of the Opportunity section of the CRM. It allows you to overview and manage your sales opportunities at each stage of the sales process. It is a great way to keep you efficient, and organized and bring clarity to both you and the sales team.

Info: *You can navigate to the Sales Pipeline in several ways, below, are just a couple:*

4. **Navigate to the Sales Pipeline**

   4.1. To navigate to the **Sales Pipeline** from the **My Work Day** screen, locate the **Total Active Opportunities field** at the top of the screen and **Click** it
   4.2. To get to the **Sales Pipeline** directly from the **Left Navigation Bar,** find the **Bar** at the Left of the screen and select **Opportunities**
   4.3. From the Opportunities **Submenu**, select **Sales Pipeline**

   !! ***Heads-Up:*** *The Deal Stages will be **Empty** until you add an **Opportunity** or **Convert** a **Lead** to an **Opportunity**.*

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5. **Add Custom Deal Stages to the Sales Pipeline**

    5.1. To add **Custom Deal Stages** to your Pipeline from the **Left Navigation Bar**, go to the bottom and select **Settings**
    5.2. The **Settings Submenu** opens
    5.3. Under **Customization**, select **Opportunities**
    5.4. The **Sales Pipeline** tab opens by default
    5.5. At the **Bottom,** click **Add Stage**
    5.6. In the **Add New Stage Dialogue Box** enter a **Name*** for the **Custom Deal Stage** and, assign a **Color** to it
    5.7. Click **Create**
    5.8. You can also add **Custom Deal Stages** when **Converting** a **Lead** to an **Opportunity**

**Mandatory Fields.*

!! *Why are some stages Locked?*
In Transaction**, **Won**, and **Lost** are default stages and can't be **Adjusted** or **Deleted

!! *Only the TRANSACTION MANAGEMENT (TM) APP can activate the 'In Transaction' stage.*
*Whenever a transaction is processed with Bildhive's **Transaction Management (**TM) App, the **Opportunity Card** is automatically **Moved** to the **Transaction Stage**. Once a **Transaction** is **Executed** (signed and finalized), the **Card** will be automatically **Moved** to the **Won** column.*

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6. **Adjust the Win Probability Percentage**

    6.1. By **Default**, a **20%** Win Probability Percentage is assigned to a **New Stage**
    6.2. To enter a different **Win Probability Percentage**, go to the **Left Navigation Bar**, and select **Settings**
    6.3. In the **Settings Submenu,** Under **Customization**, select **Opportunities**
    6.4. The **Sales Pipeline** tab opens by default
    6.5. Locate your **New Stage** under the **Name** column
    6.6. On the **Win Probability Column, Click** the **Black Arrow** next to the percentage and adjust the win probability **Percentage**

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7. Add a New Deal Source Option

7.1. To **Add** a **New Deal Source Option,** go to the **Left Navigation Bar**, and select **Settings**

7.2. In the **Settings Submenu,** under **Customization**, select **Opportunities**

7.3. The **Sales Pipeline** tab opens by default

7.4. Select the **Deal Sources Tab**, then, at the bottom, click **Add Source**

7.5. Enter the **Information** and click **Create**

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8. **Add a New Loss Reason**

   8.1. To **Add** another **Reason** for why a **Deal** was **Lost**, go to the **Left Navigation Bar**, and select **Settings**
   8.2. In the **Settings Submenu,** under **Customization**, select **Opportunities**
   8.3. The **Sales Pipeline** tab opens by default
   8.4. Select the **Loss Reasons** tab, then, at the bottom, click **Add Reason**
   8.5. Enter the **Information** and click **Create**

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9. **Edit or Delete Sales Pipeline Custom Fields**

    9.1. To **Edit** or **Delete** any of the **Sales Pipeline Custom Fields**, go to the **Main Navigation Menu** and select **Settings**
    9.2. On the Settings Menu, select **Opportunities**,
    9.3. At the **Top** of the Main Stage, select either the **Sales Pipeline**, **Deal Sources,** or **Loss Reasons Tabs**
    9.4. Once the tab opens, under the name column, locate the **Field** you want to **Edit/Delete,**
    9.5. Locate the **Actions** column to the right and select the **Edit** or **Delete** icons
    9.6. Make the **Edits** and **Save** or **Delete** and **Confirm**

!! Why are some Options Locked?

- *Under the Stages Tab, **In Transaction**, **Won**, and **Lost** are default stages and can't be **Adjusted** or **Deleted***
- *Under the **Deal Sources Tab**, the **No Source** is also a **Default Option** that will be applied if the **Sales Rep** does not **Define** a **Source***

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Convert Leads to Opportunities and Add Opportunities to Leads

10. **Add a New Opportunity, from the Left Navigation Bar, the Lead List, or the Quick View Card**

    10.1. From the **Left Navigation Bar,** select **Opportunities,** click **Sales Pipeline,** and then, at the top, click **Add New Opportunity**
    10.2. From the **Lead List**, click on the **Three-Dot Action Menu** to the **Right** of each lead and select **Add Opportunity**
    10.3. From the **Quick View Card** of a **Lead,** find the **Opportunities** section and click **Add**
    10.4. In the **Add Opportunity** dialogue box, select a **Lot*** and an **Elevation***
    10.5. Enter the **Primary Contact*** or skip this step if the contact is predefined
    10.6. Select an **Estimated Opportunity Close Date***
    10.7. From the **Dropdown Menu,** select a **Deal Stage*** or **Add** a **New Stage**
    10.8. Add a **Value***
    10.9. From the **Dropdown Menu,** select a **Deal Source*** or **Add a New One**
    10.10. Select **Visibility**
    10.11. The **Sales Owner(s)*** field is pre-populated with whoever created the **Opportunity** you can select more than one owner from the dropdown
    10.12. In the field titled **Interested In,** describe the **Opportunity**
    10.13. Click **Create**

**Mandatory Fields.*

Info: About Visibility
*The **Visibility** field is located at the bottom of the **Add New** dialogue box. Here you can specify whether the **Lead's Information** is **Visible** to **Everyone** in the team or only to the **Sales Owner(s)**. The person who **Creates** the **Lead** is considered the **Sales Owner**. Others on the team may only be able to **View** an **Opportunity**, but not **Edit** or **Delete** it, depending on the **Privileges** they were granted on the Team Configurator (TC) App.*

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11. **Add a Secondary Contact/Purchaser to the Opportunity**

11.1. **Click on the three dot of the opportunity**
11.2. **From the dropdown, select Edit**
11.3. **On the secondary Navigation Menu select Secondary Contacts/Purchasers**
11.4. **Click Add**
11.5. **Fill in Pop up**
11.6. **Add Connection**

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12. **Convert a Lead to an Opportunity from the General Detail Screen**

12.1. Open a **Lead's General Details Screen,** and at the **Top Left,** on the **Quick Info Square,** click **Convert Lead**
12.2. In the **Convert [Lead] to an Opportunity** dialogue box, select a **Lot*** and an **Elevation***
12.3. The **Primary Contact*** is predefined
12.4. Enter an **Estimated Opportunity Close Date***
12.5. from the **Dropdown Menu,** select a **Deal Stage*** or **Add** a **New Stage**
12.6. Add a **Value***
12.7. From the Deal Source **Dropdown,** select a **Deal Source*** or **Add a New One**
12.8. Select **Visibility**
12.9. The **Sales Owner(s)*** field is pre-populated with whoever created the **Opportunity** you can select more than one owner or delete them
12.10. In the field titled **Interested In,** describe the **Opportunity**
12.11. Click **Create**
12.12. The new opportunity appears in the **Sales Pipeline**

******Mandatory Fields.*

!! ***A lead/contact can have MORE THAN ONE OPPORTUNITY.***

***Info:* About Visibility**
*The **Visibility** field is located at the bottom of the **Add New** dialogue box. Here you can specify whether the **Lead's Information** is **Visible** to **Everyone** in the team or only to the **Sales Owner(s)**. The person who **Creates** the **Lead** is considered the **Sales Owner**. Others on the team may only be able to **View** an **Opportunity**, but not **Edit** or **Delete** it, depending on the **Privileges** they were granted on the Team Configurator (TC) App.*

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13. Convert a Lead to an Opportunity from the Quick View Card

13.1. Open the **Quick View Card** and click **Convert Lead**
13.2. In the **Convert [Lead] to an Opportunity** dialogue box, select a **Lot*** and an **Elevation***
13.3. The **Primary Contact*** is predefined
13.4. Enter an **Estimated Opportunity Close Date***
13.5. from the **Dropdown Menu,** select a **Deal Stage*** or **Add** a **New Stage**
13.6. Add a **Value***
13.7. From the Deal Source **Dropdown,** select a **Deal Source*** or **Add a New One**
13.8. Select **Visibility**
13.9. The **Sales Owner(s)*** field is pre-populated with whoever created the **Opportunity** you can select more than one owner or delete them
13.10. In the field titled **Interested In,** describe the **Opportunity**
13.11. Click **Create**
13.12. The new opportunity appears in the **Sales Pipeline**

*****_Mandatory Fields._

Info:* *About Visibility
*The **Visibility** field is located at the bottom of the **Add New** dialogue box. Here you can specify whether the **Lead's Information** is **Visible** to **Everyone** in the team or only to the **Sales Owner(s)**. The person who **Creates** the **Lead** is considered the **Sales Owner**. Others on the team may only be able to **View** an **Opportunity**, but not **Edit** or **Delete** it, depending on the **Privileges** they were granted on the Team Configurator (TC) App.*

!! *A lead/contact can have MORE THAN ONE OPPORTUNITY.*

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14. **View your Opportunities in the Sales Pipeline**

Intro: Once you have set up your Sales Pipeline and have added opportunities to it, you can switch from the Card View mode to the List View mode by clicking on the card view or list view icons just below the Add New Opportunity button at the top of the screen.

The card (in the card view) or row (in the list view) displays a summary of information about the Opportunity, that includes:

- **Opportunity Details, like Lot Number, Model Name, and Elevation**
- **Primary Contact**
- **Value (the value will automatically reflect any premiums associated with the selected lot or home model)**
- **Win Probability (%)**
- **Estimated Close Date (or Executed date if it is in the Won column)**
- **Sales Owner(s) Avatar (s)**
- **Number of Notes, Tasks**

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15. **Drag your Opportunities to a Different Stage in the Pipeline**

15.1. To **Manually Move** the **Opportunity Cards** to a **Different Stage** of the **Pipeline**, Open the pipeline in **Card View**

15.2. Locate the **Card** you want to **Move** and **Drag** it to the **Stage** you want to move it to

15.3. Make sure the **Top** of the **Card Touches** the **Colored Section** of the **Stage Column**, otherwise, it will not move

!! ***You can't move your card to the In Transaction Column?***

The In Transaction Column is Locked. The only way to move a card to the In Transaction column is through the Transaction Management App for High-Rise Projects or for Low-Rise Projects.

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16. Sort your Opportunities

16.1. To **Sort** your opportunities by **Name**, **Deal Stage**, **Value,** or **Sales Owner**, Open the Sales Pipeline in **List View**

16.2. Under the **Add New Opportunity Button**, click the **Sort Menu** and select an **Option**

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Edit an Opportunity's General Information and Interact with them

Introduction: The Bildhive CRM offers several Editing and Action tools that make it easy to interact with Opportunities. No matter where you are in the CRM, you can access these tools with a minimum number of clicks.

17. **Access the Opportunity's Editing and Interaction Tools Directly from the Sales Pipeline:**

    17.1. In the **Sales Pipeline**, click on the **Three-Dot Action Menu** to the **Right** of each Card (in the card view) or Row (in the List View) and select an **Action:**
    •Quick View •Edit Opportunity •Add a Note related to this Opportunity • Add a Task Related to this Opportunity •Schedule an Appointment for this Opportunity •Write an Email to this Opportunity •Mark as Lost •Mark as Won •Process Transaction •Delete Opportunity

18. **Access the Opportunity's Editing and Interaction Tools Directly from the Quick View Card**

    18.1. In the **Sales Pipeline**, open the **List View**,
    18.2. locate the Opportunity you want to interact with and, select it
    18.3. Once the Quick View Card opens, select an **Action:**
    •Edit Opportunity •Email Opportunity •Delete Opportunity •Add Notes and Tasks related to this Opportunity •Schedule an Appointment for the Opportunity •Check the Forms they've Submitted •View the Attachments that have been submitted •View this Contact's Timeline
    18.4. Click on the **Details Tab** to view this Opportunity's **Details**

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The Opportunity's General Information Screen

Introduction: The Opportunity's **General Information** screen contains all the information about a specific Opportunity. Any **Actions** taken from this section of the app will impact the **Opportunity Directly.**

The Opportunity Details, like, **Lot Number, Model, and Elevation** appear at the **Top Left** of the main stage and on the **Quick Info Square** below it. Clicking the **Back Arrow** next to the **Opportunity's Name will** take you into the **Sales Pipeline.**

19. To open the **Opportunity's General Information Screen** do one of the **Following:**

    19.1. **From** the **Card** or **List View** of the **Sales Pipeline,** find the **Three-Dot Action Menu**
    19.2. **Click It** and select **Edit Opportunity**
    19.3. From the **Opportunity's Quick View Card,** click the **Pencil Icon**
    19.4. Or go to the **Top Right,** locate the **Small Arrows,** and click
    19.5. From the **Lead's General Information Screen**, click **Opportunities** this will take you to the Sales Pipeline

    !! *Can't see the Three-Dot Action Menu?*
    *You might need to **Scroll Right** to see it.*

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20. View and Edit the Information of an Opportunity

Info: *On the Opportunity's General Information Page, you will see all the information you added when you created the opportunity. You can edit this information if necessary. At the top of the screen, you will see a **Quick Info Square** and a dashboard indicating **Transaction Details.** Should you need to add custom fields to the General Information Page, Follow These Steps.*

20.1. **View**, **Add,** or **Change** the **Deal Stage** by clicking on the arrow and selecting a stage from the **Dropdown Menu**
20.2. **Edit** or make **Additions** to the **Opportunity's General Information** by entering the information in the appropriate field(s)
20.3. **View, Edit,** or **Add Owners** to this Opportunity by selecting them from the **Dropdown Menu**
20.4. Allow **Everyone** to see this information or **Change** the **Visibility** to **Sales Owner(s) Only**, by selecting it from the **Visibility Dropdown Menu**

!! ***When you change the Deal Stage in the General Information Screen****, the **Opportunity Card** in the **Sales Pipeline Moves Accordingly**. Similarly, when you **Move** a **Card** in the **Sales Pipeline**, the **Deal Stage** updates on the **General Information** screen.*

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21. **Process a Transaction for a Specific Opportunity from its General Information Screen:**

   21.1. Go to the top of the **General Information Screen, and** click **Process Transaction**

   21.2. The **Transaction Management (TM) App opens**

‼ ***The Transaction Management Failed to Open.***
*If the app won't open, it's likely that you don't have the **right permissions**. Contact your admin team.*

‼ ***Do you want to Learn About the Transaction Management App?***
Click Here for High-Rise projects or Here for Low-Rise projects

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22. Archive a Won or Lost Opportunity

22.1. To **Archive** a **Won** or **Lost** opportunity**,** open the **Pipeline** and locate the **Opportunity**
22.2. If you are in the **Card View,** find the **Three-Dot Action Menu** at the **Top** of the **Opportunity Card** and **Click** on it
22.3. In the **List View,** locate the **Three-Dot Action Menu** to the **Far Right** of the **Row** and **Click** on it
22.4. From the **Menu**, select **Archive**
22.5. **Optionally,** you can add **Final Notes** in the **Archive Opportunity** dialogue box and change the **Close Date**
22.6. **Save**
22.7. The opportunity will be **Listed** in your **Archived Opportunities** under the **Won Tab** or the **Lost Tab**

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23. Move or Delete an Archived Opportunity

23.1. To **Move** the **Archived Opportunity** to a **Different Stage** or **Delete** it from the **List,** locate the Opportunity, and to the **Far Right** of the **Row,** click the **Three-Dot Action Menu**

23.2. Click **Move To**, and then select the Pipeline Stage to which you wish to move this opportunity

23.3. Or select **Delete** and **Confirm**

23.4. To **Bulk Delete** or **Bulk Move** opportunities to a different **Stage,** select **Two** or **More** archived Opportunities and click on the **Bulk Action** button at the top of the screen

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Edit or Interact with an Opportunity from their General Information Screen

Introduction: The Opportunities Navigation Bar is located on the General Information Screen, directly below the Quick Information Square. This bar allows you to switch between Editing your Opportunity's Information, Interacting directly with them, and keeping yourself Organized. The options are as follows:

- **General Information***** View and edit the information of an Opportunity
- **Secondary Contacts/Purchasers** *Add a Secondary Contact / Purchaser to the Opportunity
- **Notes***** Add a note regarding the Opportunity
- **Tasks** *** Create a task regarding an Opportunity
- **Appointments** *** Schedule an appointment with the Opportunity
- **Email** *** Send & Receive emails to and from the Opportunity
- **Form Submissions**** Access all the forms this Opportunity has submitted
- **Attachments****Access the documents that the Opportunity has submitted. These include deposits, credit information, etc.
- **Timeline**** View a thread of events with regards to the Opportunity

Info:

*** *Can also be accessed from the **Three-Dot Action Menu** & the **Quick View Card***

** *Can also be accessed from the **Quick View Card***

* *Can only be accessed from the **Opportunity's Navigation Bar***

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24. View or Connect Secondary Contacts/ Purchasers Associated With an Opportunity

24.1. To connect **Secondary Contacts/Purchasers**, go to the **Opportunity's General Information Screen** and, from the **Opportunity's Navigation Bar**, select **Secondary Contacts/Purchasers**

24.2. Click + to add a new **Secondary Contact**

24.3. In the **Search a Contact** field of the **Add Secondary Contact/Purchaser** dialogue box

24.4. Start **Typing** the name of the **Secondary Contact** and, if it is already a **Contact,** select it from the **Dropdown** menu

24.5. If the Contact is not yet entered into the CRM, enter their **Email*** and **First*** and **Last Name***

24.6. Click **Add Connection**

24.7. The **Secondary Contacts** and their information will be **Included** in the **Secondary Contact/Purchasers** list

24.8. To **Disconnect** a Contact from this **Opportunity,** click the **X** to the **Far Right** of the **Contact**

**Mandatory Fields.*

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25. Opportunity Notes: Add, View, Edit, and Delete

25.1. In the **Opportunity's Navigation Bar**, select **Notes** to see a **List** of notes related to the Opportunity
25.2. To **Add** a new **Note**, click the **Plus** icon, fill in the information, and click **Create**
25.3. Click the **Eye** icon to **Preview** the **Note**
25.4. Click the **Edit** icon to **Edit** the **Note**
25.5. Click **Delete** to **Get Rid** of this Note,

!! ***The 'Related To' field contains the Details of the Opportunity and is Locked.***

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26. Opportunity Tasks: Add, View, Edit, and Delete

26.1. In the **Opportunity's Navigation Bar**, select **Tasks** to see a list of tasks related to this opportunity
26.2. To **Add** a new **Task**, click the **Plus** icon, fill in the information, and click **Create**
26.3. Click the **Eye** icon to **Preview** the **Task**
26.4. Click the **Edit** icon to **Edit** the Task
26.5. Click **Delete** to **Get Rid** of this Task

‼ TIP. ***There are other ways to view your Tasks:***

- *In the **My Work Day Dashboard** (select **My Work Day** from the left navigation bar)*
- *In your **Calendar** (select **Calendar** from the left navigation bar)*
- *In your general **Tasks List** (select **Tasks** from the left navigation bar)*
- *In the **Opportunity's Quick View Card** (select the **Opportunity** from the **Pipeline** or select **Quick View** from the **Three-Dot Action Menu** and scroll down to **Tasks**)*

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27. **Schedule an Appointment from an Opportunity's Detail Screen**

27.1. To **Add** a new **Appointment** for this **Opportunity**, from the **General Information Screen,** go to the **Navigation Bar**, and select **Appointments**
27.2. At the Top of the appointment list, click the **Plus** icon
27.3. **Fill In** the information* and click **Create**
27.4. Your **Appointment** is added to the **Appointment List** organized by **Today, Tomorrow,** or **Later**
27.5. Click the **Eye** icon to open a **Preview** of the **Appointment**
27.6. Click the **Edit** icon to **Edit** or **Delete** the **Appointment**
27.7. To **Get Rid** of this **Appointment**, click **Delete**

** Title, Date, Start Time, End Time, Assign To, and Appointment Type are Mandatory Fields*

!! *Make Sure to Connect to Your Email Account.*
*To **Schedule Appointments**, you need to **Integrate** with your **Email Account**.*
Follow These Steps

!! TIP. *There are other ways to view your Appointments:*

- *In the **My Work Day Dashboard** (select **My Work Day** from the left navigation bar)*
- *In your **Calendar** (select **Calendar** from the left navigation bar)*
- *In your general **Appointments List** (select **Appointments** from the left navigation bar)*
- *In the **Opportunity's Quick View Card (select Quick View from the Three-Dot Action Menu** and scroll down to **Appointments** and **Click** to expand)*

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28. **Send an Email to this Opportunity from the Quick Info Square**

28.1. From the **Sales Pipeline**, locate the **Opportunity**
28.2. Click the **Three-Dot Action Menu** and select **Edit** to **Open** the **Opportunity's General Information Screen**
28.3. At the Top Left, locate the **Quick Info Square** and click the **Email** icon
28.4. The **Add New Message** dialogue box opens
28.5. Enter an **Email Address** in the **To** field*
28.6. Enter a **Subject***
28.7. Enter the **Message***
28.8. If you have created email **Text Templates** you can select them from the **Dropdown** menu
28.9. You can **Upload** an **Attachment** if you need to
28.10. Go to the **Bottom** of the dialogue box and click **Preview**
28.11. On the message preview, click **Send** or **Cancel**

!! ***Make Sure to Connect to Your Email Account.***
*To compose and view **Emails**, you need to **Integrate** with your **Email Account**.*
Follow These Steps.

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29. Email the Opportunity’s Contact from their General Information Screen

29.1. From the **Sales Pipeline**, locate the **Opportunity**
29.2. Click the **Three-Dot Action Menu** and select **Edit** to **Open** the **Opportunity’s General Information Screen**
29.3. From the **Opportunity’s Navigation Bar**, select **Email**
29.4. The **List** of **Emails** related to this **Opportunity** displays
29.5. To **Compose** a new **Email**, go to the **Top** of the list and click the **Plus Sign**
29.6. The **Add New Message** dialogue box opens
29.7. Enter an **Email Address*** in the **To** field
29.8. Enter a **Subject***
29.9. Enter the **Message***
29.10. If you have created email **Plain Text Templates** you can select them from the **Dropdown** menu
29.11. You can **Upload** an **Attachment** if you need to
29.12. Go to the **Bottom** of the dialogue box and click **Preview**
29.13. On the message preview, click **Send** or **Cancel**

*Mandatory Fields.

!! ***Make Sure to Connect to Your Email Account.***
*To compose and view **Emails**, you need to **Integrate** with your **Email Account**.*
Follow These Steps.

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30. **Access the Forms Submitted in Relation to this Opportunity**

30.1. From the **Sales Pipeline**, locate the **Opportunity**
30.2. Click the **Three-Dot Action Menu** and select **Edit** to **Open** the **Opportunity's General Information Screen**
30.3. From the **Opportunity's Navigation Bar**, select **Form Submissions** to open a **Lis**t of the **Forms** submitted in relation to this **Opportunity**
30.4. **Click** the eye icon to **Preview** a **Form**

!! ***Where are these Forms Coming from?***
*These are **Registration** and other types of forms and surveys **Collected** at the **Different Touchpoints**, like websites and landing pages.*

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31. **Access all the Attachments Submitted in Relation to this Opportunity**

31.1. From the **Sales Pipeline**, locate the **Opportunity**
31.2. Click the **Three-Dot Action Menu** and select **Edit** to **Open** the **Opportunity's General Information Screen**
31.3. From the **Opportunity's Navigation Bar**, select **Attachments**
31.4. The **Files** that have been submitted by this Lead are **Listed**
31.5. To **Preview** a file, click the **Eye Icon**
31.6. To **Download** it, click the **Download Icon**

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32. **View a Timeline of the Activity Related to this Opportunity**

32.1. From the **Sales Pipeline**, locate the **Opportunity**
32.2. Click the **Three-Dot Action Menu** and select **Edit** to **Open** the **Opportunity's General Information Screen**
32.3. From the **Opportunity's Navigation Bar**, select **Timeline**
32.4. A **Timeline** of the **Activities Related** to this **Opportunity,** displays

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Define Your Email Settings

33. **Connect to your Email Account Through Integrations**

!! ***Connecting to your Email Account is NOT mandatory, BUT,***
*Connecting enables you to send **Emails** to your contacts and **Schedule Appointments Directly** from your **CRM** app. It also allows prospective users to **Set-up Meetings DIRECTLY** from your **Website** or **Landing pages**.*

33.1. To connect to your **Email Account**, go to the **Left Navigation Bar** and select **Settings**
33.2. On the **Settings Submenu,** under **Email & Calendar Settings,** select **Integrations**
33.3. In the **Email Accounts** section**,** select the **Email Account** of your preference and click **Sign in**
33.4. **Allow** Bildhive to **Connect** to your account
33.5. This will bring you back to the **Email Accounts Window** and the **Status** will appear as **Connected**
33.6. Below the **Email Accounts** section, the **Video Conferencing** section will display
33.7. Use this section to connect to **Zoom**
33.8. To disconnect from your email account, click **Disconnect**

!! ***There are other options for Virtual Appointments besides Zoom.***

- *If you use **Gmail**, you can also use **Google Meet***
- *If you use **Office 365,** you can also use **Teams***
- *If you use **Outlook**, you can **ONLY** use **Zoom***

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34. **Add your Signature to your Emails**

34.1. Go to the **Left Navigation Bar** and select **Settings**
34.2. Under **Email & Calendar Settings,** select **Email Signature**
34.3. The **General** tab is open by default
34.4. Enter the **Information** that you want to appear in your signature
34.5. To add a **Logo** to your signature, click the **Logo** tab next to the General tab and select a, previously uploaded, logo from your **Media Library** and click **select**
34.6. Or **Drag** and **Drop** it in the field
34.7. **To** add a **Social Profile,** first, click on the **Social** tab**,** then, at the bottom, click **Add More**
34.8. On the **Add Social Profile** pop-up**,** first, click the **Arrow** to open the **Dropdown Menu** and select a **Platform**
34.9. Then, click on the **Add Social** field and enter your **Link**
34.10. Click **Create**
34.11. To select a different **Signature Layout,** click the **Design** tab and select a different **Layout**
34.12. Click **Save**
34.13. All your **Emails** will **Automatically** include your **Signature**

!! ***Do you want to Delete your Signature from an Email?***
*If you do not want your **Signature** to appear on your email, simply **Deactivate** it.*
Follow These Steps.

!! ***About Uploading to the Media Library:***
*If you have not uploaded the **Logo** to your Media Library yet, you can upload it now using the **Content Asset Management System** (CAMS). Please Follow These Steps if you don't know how to upload to the Content Asset Management (CAM). Make sure to follow the Bildhive Asset Preparation Guidelines when preparing your assets.*

!! ***About File Formats and Folders:***
*Different **Sections** in the **Bildhive Platform** require you to upload files in **Specific Formats**. When a section requires a **jpeg or png Format**, only the existing files with those formats will be **Listed** in the Media Library.*

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35. **Hide your Signature on an Email**

35.1. When **Composing** the email, locate the **Show Email Signature** button below the **Subject** field and **Slide** the radio button to the **LEFT**

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36. Create an Email Template

36.1. To add an email **Template**, go to the **Left Navigation Bar** and select **Settings**
36.2. On the **Settings Submenu,** under **Email & Calendar Settings,** select **Email Templates**
36.3. At the bottom of the Templates Screen, click **Add New Template**
36.4. **Type** the **Subject*** and **Message*,** and **Stylize** the font and paragraph
36.5. Upload an **Attachment,** if needed
36.6. **Save** your **Template**
36.7. On the **Templates List,** to the **Right** of your template, you can **Preview, Edit** or **Delete** a **Template**

**Mandatory Fields.*

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Custom Opportunity and Custom Task Fields

37. Custom Opportunity Fields: Add, Edit, or Delete

37.1. Select **Settings** on the **Left Navigation Bar**
37.2. On the **Settings Navigation Bar,** under **Customization,** select **Opportunities**
37.3. The **Sales Pipeline** tab is open by default, use this tab to **Add a Stage,** assign a **Color,** and **Win Probability Percentage**
37.4. Select the **Deal Sources** tab to **Add** a **New Source**
37.5. Select the **Loss Reasons** tab to **Add** a **Reason**
37.6. To **Edit** or **Delete** a **Custom Field** for **Opportunities,** select **Settings** on the **Left Navigation Bar**
37.7. On the **Settings Navigation Bar,** under **Customization,** select **Opportunities**
37.8. Click on the **Sales Pipeline**, **Sources**, or **Reasons** tab
37.9. In the **List,** locate the **Option** you want to edit or delete, go to the **Right** of the field, and click **Edit** or **Delete**
37.10. Once you make the necessary adjustments, click **Update**

‼ ***How come some Options are Locked?***
*Options that are **Locked** are the **Default Options** and cannot be **changed** or **Deleted**.*

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38. Custom Task Types: Add, Edit, or Delete

38.1. Select **Settings** on the **Left Navigation Bar**
38.2. On the **Settings Navigation Bar,** under **Customization,** select **Tasks**
38.3. To add a new **Task** type, at the bottom of the field, click **Add Type**
38.4. Enter a **Name***
38.5. Click **Create**
38.6. To **Edit** or **Delete** a **Task Type,** select **Settings** on the **Left Navigation Bar**
38.7. On the **Settings Navigation Bar,** under **Customization,** select **Tasks**
38.8. In the **Task Type List** locate the **Task Type** you want to edit or delete, go to the **Right** of the field, and click **Edit** or **Delete**,
38.9. Once you make the necessary adjustments, click **Update**

*****_Mandatory Fields._

!! _How come some Task Options are locked?_
There are three Default Task Options: To Do, Call, and Follow Up. They cannot be edited or deleted.

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Configure your Meeting or Appointment Settings

39. **Open the Meetings Settings**

    39.1. On the **Left Navigation Bar,** Select **Settings**

    39.2. On the **Settings Submenu,** under **Customization,** select **Meetings**

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40. **Configure the Meeting Dates, Types, Times, Duration, Minimum Notice Time, and Buffer Time**

40.1. Select **Rolling Weeks** or **Custom Date Range** and select a **Range**
40.2. From the **Select your Preferred Meeting Type** dropdown, select all the options that apply
40.3. Enter the **Days** of the **Week** and **Available** Time **Ranges** when people can **Book** a meeting in your calendar
40.4. From the **Duration** dropdown, select the **Length** of the meetings
40.5. From the **Minimum Notice Time** dropdown, select the minimum time between when a meeting is **Booked** and when it can **Take Place**
40.6. From the **Buffer Time** dropdown, select how much **Time** should pass **Between** the **End** of a **Meeting** and the **Beginning** of the **Next One**

!! TIP. ***Provide More Than One Duration Option.***
*This way, the client can **Decide** whether they need a **Short** or a **Long** meeting.*

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Configure your Meeting or Appointment Reminders and your Appointment Booking Widget

41. **Schedule a Pre-Meeting Reminder for Yourself**

    41.1. In the **Pre-meeting Reminder Section**, select how long before a meeting you would like to receive a **Reminder Email**

    41.2. If you are **Logged** into **Bildhive** at the time, you will see a **Pre-meeting Notification** pop up

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42. **The Appointment Booking Widget**

‼ ***What is the Appointment Widget?***

*It is a **Component** that you can add to a **Website** or **Landing Page** to enable prospects and customers to **Book Appointments.** It also allows **Clients** to **Reschedule Appointments** directly from their **Confirmation Emails**.*

Click Here to Learn How to add it to your Website or Landing Page.

‼ ***What happens If Multiple team Members are logged into the Appointment Booking Widget?***

*The prospects and customers will be able to select from the **Combined Appointment Options** entered by the members of the **Sales Team**. Meetings will be assigned in a **Round Robin** fashion based on when team members **Configure** their **Meeting Parameters**.*

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43. **Allow the Clients to Reschedule their Appointments from their Confirmation Email**

43.1. To allow your Prospective clients to **Reschedule** their **Appointments**, you need to **Copy and Paste** the **Appointment Widget URL** from the **Website/ Landing** page that **Contains** it

43.2. If the Website or Landing Page **Have Not Been Published**, you **Must** use the **URL** of the **Preview**

43.3. To find it, **Open** the **Website & Landing Page Builder** (WLPB)

43.4. **Select** the **Project** that contains the **Appointment Widget**

43.5. **Preview** the **Page** that **Contains** the **Widget** and copy the **URL** that appears in the **Top Bar**

43.6. Then, go back to the **CRM,** and from the **Left Navigation Bar**, click **Settings**

43.7. On the **Settings Submenu,** under **Customization,** select **Meetings**

43.8. On the **Meeting Settings Screen**, Scroll to the **Appointment Widget URL** section and **Paste** the **Widget URL**

!! STOP*. **Once the Website or Landing is Published, you MUST replace the URL with the URL of the Live Site.***

*Just **Open** the **published website**, go to the **page** that contains the **Appointment Widget**, **copy** the **URL,** and paste it into the **Appointment Widget URL** section of the CRM's **Meeting Settings.***

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44. What Users See in the Appointment Booking Widget on the Website

Team Members Define the following in the CRM:	**Users see the following on the website:**
When a Meeting can be Scheduled ***Info:*** *These consist of a range of dates when people can book a meeting.*	**A calendar showing the available dates when they can meet with a team member.** ***Info:*** *Meeting dates and days are based on availability, defined by the team members in the CRM.* **!!** *Calendar days during which team members are unavailable will be grayed out.*
Preferred Meeting Type ***Info:*** *Select Phone, Virtual, and /or Sales Center Meeting.*	**Buttons showing the types of Meetings Available** **!!** *If the Sales Team only offers Phone Meetings, only a Phone Button is visible.*
Available Times ***Info:*** *These consist of the days and times of the week on which the team member is available for a meeting.*	**A list of available time slots for users to choose from.** ***Info:*** *This is determined by the Available Times defined by the team members, as well as the Buffer Time and the Minimum Notice Time.*
Duration ***Info:*** *The Team member selects one or more time periods during which meetings can take place.*	**A series of options with different time periods.** ***Info:*** *These are based on the time periods selected by the team member. For example, 30 minutes, 45 minutes, and an hour*
Minimum Notice Time ***Info:*** *The team member defines the minimum time between when a meeting is scheduled and when it can take place.*	***Info:*** *A meeting's first time slot is determined by the time of day plus the Minimum Notice Time. If the time is 12:00 and the Minimum Notice Time selected by the team member is 15 minutes, then the first time slot offered is 12:15.*
Buffer Time ***Info:*** *The team member determines how much time should pass between one meeting and the next.*	***Info:*** *The different time slots will be determined by the Duration plus the Buffer time. So, continuing with the previous example, if the duration selected is 30 minutes and the buffer time is 10 minutes, the second time slot offered will be 12:55 (12:15 + 30-minute duration + 10-minute buffer).*

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45. **Turn On the Confirmation Email Option and Configure the Email**

45.1. To send a Confirmation Email to the Client and allow them to **Reschedule** or **Cancel** an **Appointment**, go to the Left Navigation Bar and select **Settings** then **Meetings**

45.2. Scroll down to the **Email Notifications** section, and make sure the **Confirmation Email** option is **Turned On**

45.3. To **Turn** it **Off, Slide** the button to the **Left**

45.4. You can upload a **Logo**

45.5. Then Enter a **Subject*** and a **Preheader***

45.6. You can **Preview** the Email and send a **Test Email**

*Mandatory Fields.

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46. **Turn On the Pre-meeting Reminder Email**

46.1. If you want your prospects/ customers to **Receive** a **Pre-meeting Reminder Email**, go to the **Bottom** of the **Email Notifications Section** and **Slide** the **Pre-Meeting Reminder Email** slider to the **Right**

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Contacts Data Management

47. Rules and Recommendations for Importing Data

47.1. **Maximum Number of Leads**

- Import a **Maximum** of **15,000** leads at **Once**
- If your list **Exceeds** the limit, **Separate** it into **CSV** files each with a **Maximum** of **15,000**

47.2. **Validation Process**

- **Before** importing**, Verify** and **Validate** your email list
- Use a **Lead Validation Service or** Bildhive's Validation Process

47.3. **Bounced Emails Impact**

- **Bounced Emails** negatively affect your **Reputation**

47.4. **Bildhive's Threshold**

- Bildhive allows a bounced email **Threshold** of **0.4%**

47.5. **Bounce Rate Handling**

- If your broadcast **Exceeds 0.4% Bounce Rate**, Bildhive will **Suppress Invalid Addresses** and **FLAG** you
- **Future imports** will **Require Validation** or Bounce Cleaning to avoid **SUSPENSION**
- If **Bounce Rate Is Below 0.4%**, Bildhive **Automatically Flags** and **Suppresses** bounced addresses
- **No Further Broadcasts** are **Sent** to these **Flagged Addresses**

47.6. **Inactive Lead Suppression Policy**

- To maintain high email deliverability and protect sender reputation, leads who have **not engaged** with any communications (no email opens or clicks) **for 90 consecutive days** will be **automatically suppressed.**
- **Suppressed** leads **WILL NOT RECEIVE FUTURE EMAIL BROADCASTS** unless verified and reactivated and will be labeled as **Suppressed** in the **Opt-In Status** column on the **Lead List.**

47.7. For any **Questions** or **Concerns**, contact support@bildhive.com

47.8. To check email **Reports**, open the Report and Analytics App

*!! **Do you need to Validate your List?***
*Run it through Bildhive's Validation Process or use a **Lead Validation Service** to do so.*

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Gildie Nazari

48. **Import Lead Lists**

48.1. If you have **Custom Fields** in the File you are about to import, please Set Them Up **BEFORE** importing the Data
48.2. To ensure a **Smooth Data Import,** it is recommended that you **Reorganize** your **Excel File** following Bildhive's CRM File Structure
48.3. Then, Save your Excel File as a CSV
48.4. Once you've prepared your file, go to the **Left Navigation Bar,** and click **Settings**
48.5. In the **Submenu,** under the **Data Management** section, select **Manage Data**
48.6. Make sure the **Import from CSV** tab is **Selected**
48.7. Click **Browse**
48.8. Select the **CSV** file from your **Asset Library** and click **Select**
48.9. Map the Headings of your **CSV** file to the **Fields** in the **Dropdowns**
48.10. Select **Ignore** if you don't want a field to **Populate**
48.11. To **Add** a **Tag** to the **List,** enter the **Tag** in the **Add Tags** field
48.12. Select **Preview** to check how the fields were mapped
48.13. Select **Import** to populate the fields with the data
48.14. For more detailed instructions please **Read** the Import Leads from Acquired Lists section from **CRM-1 The Leads**

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49. **Verify and Validate Lead Lists with Bildhive's Validation Process**

49.1. On the **Verify Screen**, select **Verify your list before importing** if you **WANT to verify** your list through **Bildhive**

49.2. The **Verification Charges** display either in USD or Canadian Dollars, based on the number of emails on the list

49.3. Click **Import**

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50. **Skip the Verification Process**

    50.1. If you have already **Verified** your list with **Another Service** or if you prefer to **Skip the Verification Process**, make sure **NOT TO SELECT** the **Verify your lists before importing** option when you reach the **Verification Screen**

    50.2. Then click **Import**

!! ***Before you Skip the Verification,***
Make sure to read the Rules and Recommendations for Importing Data.

51. **Export Contact Lists**

51.1. To **Download** a **CSV** file of your **Contacts**, go to the **Left Navigation Bar,** and select **Settings**
51.2. On the **Settings Submenu,** under **Data Management,** choose **Manage Data**
51.3. At the **Top** of the main stage, click the **Export Data** tab
51.4. Click **Download CSV**
51.5. A **CSV File** of the **Contact List** will be **Saved** in your **Downloads Folder**

‼ ***The List Includes BOTH Leads and Leads who have been Converted to Opportunities.***

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52. **Export Filtered Leads**

Let's say you **tagged** the leads that were interested buying a **Semi** and you want to download a list of those leads.

52.1. **On the Left Navigation Menu, select Leads**
52.2. At the **Top** of the **Leads List,** locate and click **Filters**
52.3. When the **Filter Drawer** opens, select **Tags** to open the **Dropdown** with a list of the **Tags** you configured
52.4. Select **Semis**
52.5. At the **bottom** of the **Filters** drawer, click **Apply**
52.6. The **Lead List** will filter to show **Only** those leads **Tagged** with a **Semis Tag**
52.7. To download a file with this list, go to the **Top** of the **Lead List**, and locate and click **Export Filtered Leads**
52.8. A list of the **Leads** interested in semis will be **Downloaded** to your **Downloads Folder**

‼ *You don't remember how to create Custom Tags?*
Follow these steps: Custom Lead Tags, Add, Edit, Delete

‼ *You don't remember how to Tag a Lead?*
There are many ways to Tag a Lead:

Through a Form or Survey	Through an Imported List	Manually
If it was configured to Apply Tags to Registrants	If it contains a Tag Column	If you create the Custom Tag and select it when entering the Lead's information
Configure a Form or …	*CRM - Chapter 1 - L…*	

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53. **Bulk-Delete Unsubscribed Leads**

53.1. Go to the **Left Navigation Bar,** and select **Settings**
53.2. On the **Settings Submenu,** under **Data Management,** choose **Manage Data**
53.3. At the **Top** of the main stage, **Open** the **Bulk-Delete Tab**
53.4. Select **Unsubscribed**
53.5. From the **List,** select all those **Leads** that you want to **Delete**
53.6. Click **Bulk-Delete**

‼ ***Warning:***
*Deletion is permanent. Make sure to export a **backup** before removing large batches.*

‼ ***Export unsubscribed leads:***
- *Go to Lead List.*
- *Click Filters (top right).*
- *Under Opt-In Status, select Unsubscribed.*
- *Click Apply Filter (bottom of filter panel).*
- *Once the list appears, click Export Filtered Leads (top right).*
- *This ensures you have a backup before making permanent changes*

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54. Bulk Delete Suppressed Leads

To permanently remove suppressed leads:

54.1. Go to the **Left Navigation Bar** and select **Settings**
54.2. On the Settings **Submenu**, under **Data Management**, select **Manage Data**
54.3. At the top of the main stage, select the **Bulk Delete** tab
54.4. Then, from the three options,
- Unsubscribed
- Bounced
- Suppressed

54.5. Select **Suppressed**
54.6. From the **List,** select all those **Leads** that you want to **Delete**
54.7. Click **Bulk-Delete**

‼ *Warning:*
*Deletion is permanent. Make sure to export a **backup** before removing large batches.*

‼ *Export suppressed leads:*
- *Go to Lead List.*
- *Click Filters (top right).*
- *Under Opt-In Status, select Suppressed.*
- *Click Apply Filter (bottom of filter panel).*
- *Once the list appears, click Export Filtered Leads (top right).*
- *This ensures you have a backup before making permanent changes*

‼ *Suppressed ≠ Bounced*
*A **Bounced** lead has an invalid or unreachable email address.*
*A **Suppressed** lead has a valid email, but hasn't engaged (no opens or clicks) for 90+ days.*

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55. Bulk-Delete Bounced Leads

55.1. Go to the **Left Navigation Bar,** and select **Settings**
55.2. On the **Settings Submenu,** under **Data Management,** choose **Manage Data**
55.3. At the **Top** of the main stage, **Open** the **Bulk-Delete Tab**
55.4. Select **Bounced**
55.5. In the **Bulk Delete Pop-Up**, click on the **Bounced Reasons** field, and from the **Dropdown** select all the **Options** that apply
55.6. Click **Delete**

!! ***Did you get a 'No MX Found for the Email Provider' notification?***
*This means that the **Server** you **Specified** in the email address was **Not Found**. **Please Check the Address and Enter it Again**.*

!! ***Warning:***
*Deletion is permanent. Make sure to export a **backup** before removing large batches.*

!! ***Export bounced leads:***

1. *Go to Lead List.*
2. *Click Filters (top right).*
3. *Under Opt-In Status, select Bounced.*
4. *Click Apply Filter (bottom of filter panel).*
5. *Once the list appears, click Export Filtered Leads (top right).*
6. *This ensures you have a backup before making permanent changes.*

!! ***Suppressed ≠ Bounced***
*A **Bounced** lead has an invalid or unreachable email address.*
*A **Suppressed** lead has a valid email, but hasn't engaged (no opens or clicks) for 90+ days.*

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56. **View a History of the Lead Data Management Actions**

56.1. To view a **Detailed List** of the **Data Management Actions**, go to the **Left Navigation Bar,** and select **Settings**
56.2. On the **Settings Submenu,** under **Data Management,** choose **Manage Data**
56.3. At the **Top** of the main stage, **Open** the **History Tab**

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Date	*Reviewer*	*Status*	*Activities*
March 23/2023	Gildie	Done	☑ ~~Add Header and Footer.~~ ☑ ~~Insert Table of Contents~~ ☑ ~~Insert Back to Table of Contents~~ ☑ ~~!! double and not in italics~~ ☑ ~~*For **Optimal Performance**, please follow our Asset Preparation Guidelines when preparing your assets.*~~ ☑ ~~Three dot instead of three dot~~ ☑ ~~Make sure to say List instead of Menu: Highlight List, Amenity List, etc~~ ☑ ~~Change intro for Introduction~~ ☑ ~~Add get started as a title for Launch~~ ☑ ~~Turn Info headlines to gray~~ ☑ ~~Check table of contents links~~ ☑ ~~Check relevance with App.~~ ☑ ~~Check spelling~~ ☑ ~~Check continuity of numbers~~ ☑ ~~Update Last Edited~~ ☑ ~~Add Internal Links~~
Mar 30/2023	Gildie	Done	☑ ~~email,~~ ☑ ~~signature Radio button,~~ ☑ ~~last interaction to Last Updated Date),~~ ☑ ~~talk about Bulk actions Lead List, select two or more, then apply~~ **Not applicable to this chapter**
April 3, 2023		Done	☑ ~~Read a printout of the file and make necessary edits.~~ ☑ ~~Update Last Edited~~
Jul 28, 2023		Not started	☑ ~~Add Link~~
Apr 27/2023	Jay	Done	☑ ~~Entered into Freshdesk~~
Jul 28, 2023	Gildie	Done	☑ ~~Add information into Data Management, about validation and rules as per meeting with Nancy~~

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Gildie Nazari

bildhive

Dec 11, 2023	Gildie	Done	☑ ~~Adjust the name of the article and the intro page~~
	Jay	Done	☑ ~~Provide Jay the following adjustments for FreshDesk:~~ ☐ Add the link to "add custom fields to the General Information Page, follow these steps" in the View and Edit the Information of an Opportunity section ☐ Add a Signature to your Emails ☐ Rules and Recommendations for Importing Data ☐ Import Lead Lists ☐ Verify and Validate Lead Lists with Bildhive's Validating Process ☐ Skip the Validation Process ☐ Change the name and intro of the article ☐ Jay did not mark the previous tasks, so I do not know whether he entered them in FD. **Table of Contents** ☐ Change the Name of the article and take the word chapter out **Get Started** ☐ Connect to your Email Account using the Integrations Tab ☐ Connect to your Video Conferencing Account
Dec 20, 2023	Jay Dadhaniya	Done	☑ ~~Entered latest article changes into the Freshdesk~~
Oct 24, 2024	Gildie Nazari	Done	Updated the heads-up for 365 integration.
Oct 24, 2024	Nancy Zeni	Done	☑ ~~**Get Started**~~ ☑ ~~Connect to your Video Conferencing Account~~
25 Oct 2024	Jay	Done	☑ ~~**Updated latest changes into the Freshdesk**~~
Jul 3, 2025	Gildie Nazari	Done	**Suppressed Leads Adjustments: Contacts Data Management** ☑ ~~Rules and Recommendations for Importing Data~~ ☑ ~~Bulk-Delete Unsubscribed Leads~~ ☑ ~~Bulk-Delete Suppressed Leads~~ ☑ ~~Bulk-Delete Bounced Leads~~

Last Edited July 5/2025
Gildie Nazari

Date	Nancy Zeni	Not started	**Suppressed Leads Adjustments** ☐ Review and assign to Jay

Last Edited July 5/2025
Gildie Nazari