Good Software

Release Documentation

Sales Automation Module

Disclosure: Public

Version: 6.0

Good Software

Table of Contents

Overview

Description

The Sales Automation Module in CleverApp empowers you to automate various aspects of your sales workflow, from lead generation to follow-ups and nurturing. With intuitive automation tools and customizable workflows, you can streamline your sales processes and boost productivity.
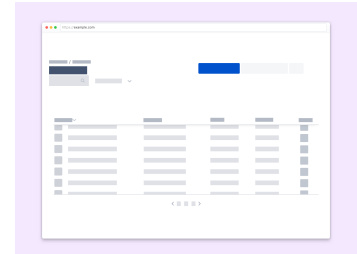
Dashboard page

Key Functionality
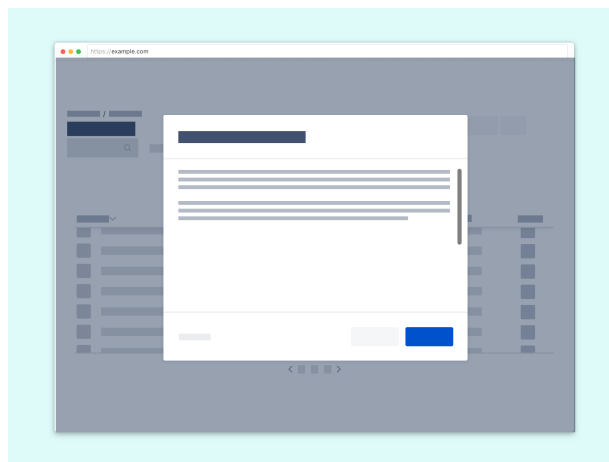
Our main action

1. **Lead Capture:** Automatically capture leads from multiple sources such as website forms, emails, or social media channels. By seamlessly integrating lead capture into your sales process, Clever App ensures that no potential opportunity slips through the cracks. This feature enables you to effortlessly grow your customer base and expand your business reach without manual data entry or missed connections.

2. **Automated Follow-ups:** Set up automated follow-up sequences to engage leads at the right time with personalized messages. With Clever App's automated follow-ups, you can nurture leads through every stage of the sales funnel, increasing engagement and conversions. By delivering timely and relevant communications, you can build stronger relationships with prospects and guide them towards making a purchase decision.

3. **Task Automation:** Streamline repetitive tasks such as scheduling meetings, sending follow-up emails, and updating CRM records. Clever App's task automation feature empowers your team to focus on high-value activities by automating routine tasks. This not only saves time and reduces manual effort but also ensures consistency and accuracy in your sales processes, leading to increased productivity and efficiency.

4. **Analytics and Reporting:** Gain insights into your sales automation performance with comprehensive analytics and reporting features. Clever App provides valuable data and metrics to help you track the effectiveness of your automation efforts, identify areas for improvement, and make data-driven decisions. By analyzing key performance indicators, you can optimize your strategies, refine your workflows, and achieve better results in your sales operations.

Getting Started

Installation

Pre-requisites

Before enablingg CleverApp's Sales Automation Module, ensure that your system meets the following requirements:

Hardware Requirements

- **Processor**: Intel Core i3 or equivalent
- **RAM**: 4GB or higher
- **Storage**: 100MB of available disk space
- **Internet Connection**: Required for accessing CleverApp's cloud-based platform

Software Requirements

- **Operating System**: Windows 10 or later, macOS 10.12 or later, Linux distributions (Ubuntu, CentOS, etc.)
- **Web Browser**: Latest version of Google Chrome, Mozilla Firefox, Safari, or Microsoft Edge
- **API Key**: Obtain an API key from CleverApp's API settings to authenticate API requests (see API documentation for details)
- **License**: Ensure that you have a valid license for CleverApp's Sales Automation Module (contact sales@cleverapp.com for licensing inquiries)

Installation Steps

Enable the Feature

To enable the Sales Automation Module, follow these steps:

1. Navigate to the Settings section of your CleverApp dashboard.
2. Locate the Sales Automation Module and click on it to access the settings.
3. Toggle the switch to enable the module for your account.
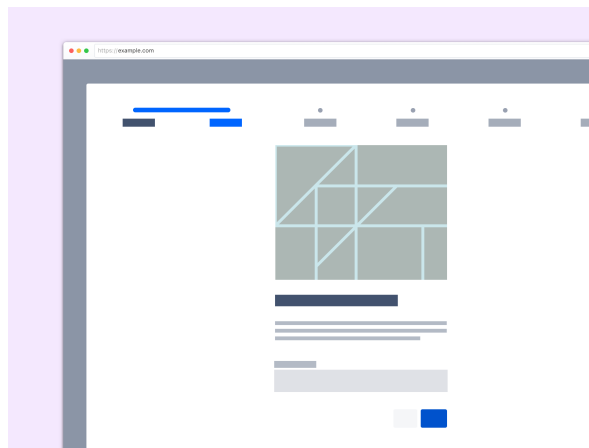
Settings section

Configure Integrations

If you're integrating with external tools such as CRM systems or email providers, configure the necessary integrations in CleverApp settings.

For detailed instructions, refer to the Integration Documentation.

Create Automation Workflows

Design your automation workflows by defining triggers, actions, and conditions using CleverApp's intuitive interface.

Learn how to create effective automation workflows in our Workflow Creation Guide.
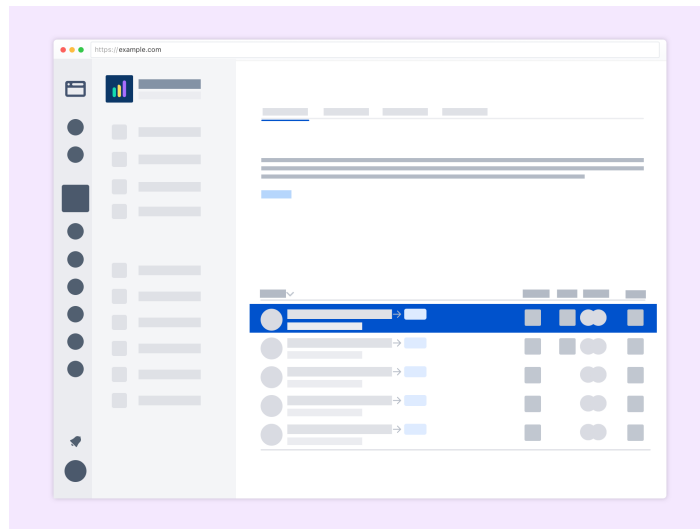
Workflow automation

Monitor Performance

Monitor the performance of your automation workflows through CleverApp's analytics dashboard. Use the insights to optimize and refine your processes for better results.

Explore our Analytics Dashboard Documentation for detailed insights and optimization tips.

Features

Feature	Description
Lead Capture	Automatically capture leads from various sources such as website forms, emails, and social media channels.
Automated Follow-ups	Set up automated follow-up sequences to engage leads at the right time with personalized messages.
Task Automation	Streamline repetitive tasks such as scheduling meetings, sending follow-up emails, and updating CRM records.
Analytics and Reporting	Gain insights into your sales automation performance with comprehensive analytics and reporting features.
Customizable Workflows	Design automation workflows tailored to your specific sales processes by defining triggers, actions, and conditions.

Feature	Description
Integration with Third-party Tools	Seamlessly integrate with external tools such as CRM systems, email marketing platforms, and calendar apps to enhance functionality.
Multi-channel Engagement	Engage leads and customers across multiple communication channels such as email, phone, social media, and live chat for a seamless experience.
Lead Scoring	Rank leads based on their likelihood to convert into customers, allowing you to prioritize follow-up efforts and focus on high-value opportunities.
Custom Fields	Define and customize additional data fields within CleverApp to capture specific information about leads, contacts, or deals.
Scheduled Workflows	Schedule automation workflows to run at specific times or intervals, automating repetitive tasks and ensuring timely follow-ups.
Role-based Permissions	Define roles and permissions to control access to features and data within CleverApp, ensuring data security and compliance with organizational policies.
Workflow Templates	Access pre-built workflow templates provided by CleverApp to expedite the setup of common automation tasks such as lead nurturing and email campaigns.

Tutorials

Capture Leads from a Website Form

To capture leads from your website form and funnel them into CleverApp, follow these simple steps:

1. **Integration Setup**: Log in to your CleverApp account and navigate to the Settings section. Under Integrations, select "Website Form" and follow the instructions to generate an embed code snippet.
2. **Embed Code**: Copy the generated embed code snippet and paste it into the HTML code of your website's lead capture form, typically within the `<form>` element. This code will capture lead information entered into the form and automatically sync it with CleverApp.

3. **Testing**: Once the embed code is implemented, test the lead capture form on your website to ensure that leads are successfully captured and imported into CleverApp. You can then access these leads within CleverApp's dashboard for further follow-up and engagement.

Send Your First Automated Follow-up Email

Sending automated follow-up emails to leads is a breeze with CleverApp. Here's how to set it up:

1. **Workflow Creation**: Navigate to the Workflows section in CleverApp and click on "Create New Workflow." Choose "Email" as the trigger and select "Lead Captured" as the event.

2. **Email Template**: Design your follow-up email template, including personalized content and a clear call-to-action. You can customize the email subject, body, and sender details to align with your brand voice and messaging.
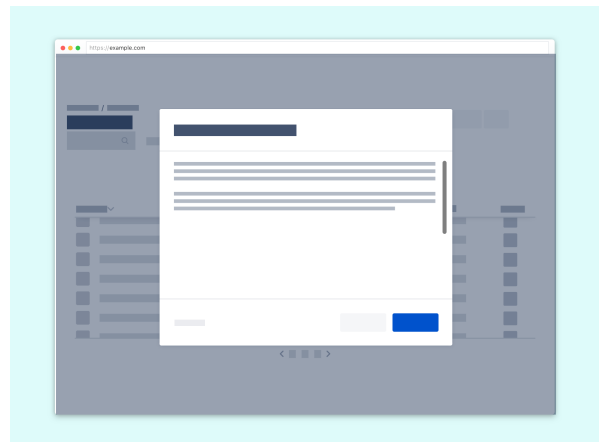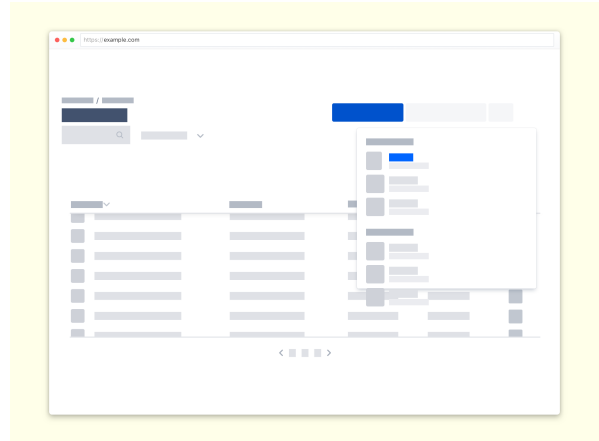
3. **Trigger Configuration**: Define the conditions for triggering the follow-up email, such as a time delay after lead capture or specific lead attributes. Test the workflow to ensure that emails are sent successfully to leads captured through your website form.
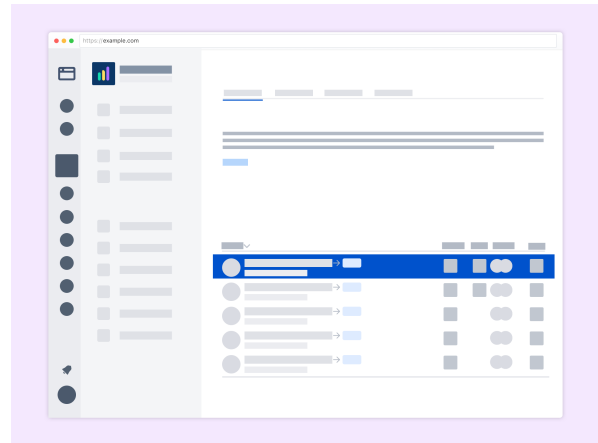
4. **Monitoring**: Monitor the performance of your automated email follow-ups through CleverApp's analytics dashboard. Track metrics such as open rates, click-through rates, and conversions to optimize your email campaigns for maximum effectiveness.

Build a Dashboard to Compare Lead Sources

Analyzing lead sources is crucial for understanding which channels are driving the most valuable leads to your business. Follow these steps to build a dashboard in CleverApp to compare lead sources:
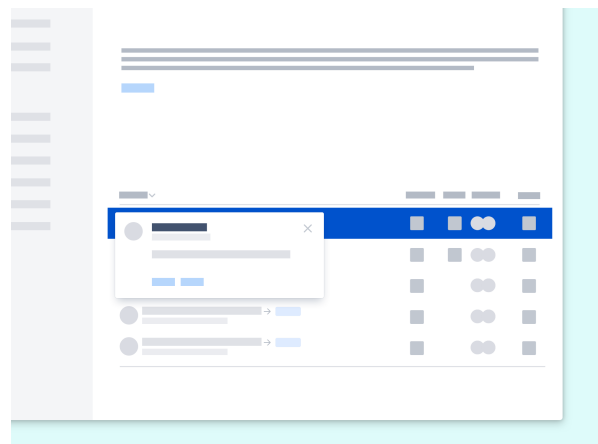
1. **Data Sources**: Access your lead data within CleverApp and identify the key metrics you want to compare across different lead sources, such as conversion rates, lead quality, or cost per lead.

2. **Dashboard Creation**: Navigate to the Dashboards section in CleverApp and click on "Create New Dashboard." Choose the lead sources you want to compare and add them as widgets to your dashboard.

3. **Widget Configuration**: Configure each widget to display the relevant metrics for the selected lead sources. Customize the widget settings to adjust the visualization type, data filters, and time period for comparison.

4. **Data Analysis**: Analyze the data presented in your dashboard to identify trends and patterns across different lead sources. Use this information to optimize your marketing efforts and allocate resources to the most effective channels for generating high-quality leads.

5. **Sharing and Collaboration**: Share your dashboard with team members or stakeholders to collaborate on data analysis and decision-making. CleverApp allows you to grant access to specific users or groups and control permissions for viewing and editing dashboards.

Build a Report to Measure Your Progress

Measuring the performance of your sales automation efforts is essential for optimizing your strategy. Here's how to build a report in CleverApp to track your progress:

1. **Analytics Dashboard**: Navigate to the Analytics section in CleverApp and select "Create New Report." Choose the relevant metrics you want to track, such as conversion rates, engagement levels, or revenue generated.
2. **Data Visualization**: Select the appropriate visualization type for your report, such as line charts, bar graphs, or pie charts. Customize the design and layout to present data in a clear and visually appealing manner.
3. **Data Filters**: Apply filters to segment your data based on specific criteria, such as time period, lead source, or campaign. This allows you to analyze the performance of different segments of your sales process and identify areas for improvement.
4. **Scheduled Reports**: Set up scheduled reports to receive regular updates on your progress via email or within CleverApp. This ensures that you stay informed about the effectiveness of your sales automation efforts and can make informed decisions to optimize your strategy.

API Documentation

Authentication

All requests to CleverApp's Sales Automation API must be authenticated using an API key. You can obtain your API key by visiting the API settings section of your CleverApp account.

> **ℹ️ About the API Key**
>
> - The API key consists of a series of characters, including letters (both uppercase and lowercase) and numbers.
> - It may also include special characters such as dots (`.`) or underscores (`_`), depending on the service provider's formatting.
> - API keys are typically long to enhance security and reduce the likelihood of brute-force attacks.

Endpoints

Lead Capture Endpoint

- **Endpoint**: `/api/leads`
- **Method:** POST
- **Description:** Capture a new lead by providing relevant information such as name, email, and source.
- **Request Parameters:**
  - `name` (string): The name of the lead.
  - `email` (string): The email address of the lead.
  - `source` (string): The source from which the lead was captured (e.g., website, email campaign).

Example Request

```
{
  "name": "John Doe",
  "email": "john@example.com",
  "source": "Website Form"
}
```

Example Response

```
{
  "id": "123456789",
  "name": "John Doe",
  "email": "john@example.com",
  "source": "Website Form",
  "timestamp": "2024-04-08T12:00:00Z"
}
```

Follow-up Email Endpoint

- **Endpoint**: `/api/follow-up`
- **Method:** POST
- **Description:** Send a follow-up email to a lead.
- **Request Parameters:**
  - `lead_id` (string): The ID of the lead to whom the follow-up email will be sent.
  - `subject` (string): The subject of the email.
  - `body` (string): The body content of the email.

Example Request

```
{
  "lead_id": "123456789",
  "subject": "Follow-up Email",
  "body": "Hi John, thank you for
your interest in our product. Please
let me know if you have any
questions."
}
```

Example Response

```
{
  "message": "Follow-up email sent
successfully to lead with ID:
123456789"
}
```

Update Lead Information

- **Endpoint**: `/api/leads/{lead_id}`
- **Method**: PUT
- **Description**: Update the information of a specific lead in CleverApp's database.
- **Request Parameters**:
  - `lead_id` (string, required): The unique identifier of the lead whose information will be updated.
  - `name` (string): The updated name of the lead.
  - `email` (string): The updated email address of the lead.
  - `phone` (string): The updated phone number of the lead.
  - `status` (string): The updated status of the lead (e.g., "Qualified", "Contacted").

Example Request

```
{
  "name": "Jane Smith",
  "email": "jane@example.com",
  "phone": "+1234567890",
  "status": "Qualified"
}
```

Example Response

```
{
  "id": "123456789",
  "name": "Jane Smith",
  "email": "jane@example.com",
  "phone": "+1234567890",
  "status": "Qualified",
  "timestamp": "2024-04-08T12:00:00Z"
}
```

Error Handling

When interacting with CleverApp's Sales Automation API, it's important to handle errors gracefully to ensure smooth integration with your application. The API follows standard HTTP status codes for indicating the outcome of a request. Below are the possible error scenarios along with their corresponding HTTP status codes and descriptive error messages.

Error Codes

❌ 400 Bad Request

- **Description**: The request is malformed or missing required parameters.
- **Error Message**: "Bad Request: The request is missing required parameters or contains invalid data."

❌ 401 Unauthorized

- **Description**: Authentication credentials are missing or invalid.
- **Error Message**: "Unauthorized: Authentication credentials are missing or invalid. Please provide a valid API key."

❌ 403 Forbidden

- **Description**: The authenticated user does not have permission to access the requested resource.
- **Error Message**: "Forbidden: You do not have permission to access the requested resource."

❌ 404 Not Found

- **Description**: The requested resource does not exist.
- **Error Message**: "Not Found: The requested resource could not be found."

❌ 5xx Server Error

- **Description**: An internal server error occurred while processing the request.

- **Error Message**: "Internal Server Error: An unexpected error occurred while processing your request. Please try again later."

Glossary

- **Sales Automation Module**: A feature within CleverApp that enables users to automate various aspects of their sales workflow.

- **Triggers**: Events or conditions that initiate an automated action in CleverApp.

- **Actions**: Tasks or activities performed automatically in response to triggers.

- **Conditions**: Criteria that must be met for an automated action to be executed.

- **CRM Systems**: Customer Relationship Management software used to manage interactions with current and potential customers.

- **Lead Capture**: The process of collecting information about potential customers or leads, often through forms on websites or landing pages.

- **Lead Nurturing**: The process of building relationships with leads through personalized communication and targeted content to guide them through the sales funnel.

- **Task Automation**: Automating repetitive tasks such as scheduling meetings, sending follow-up emails, and updating CRM records to streamline the sales process.

- **Analytics Dashboard**: A visual interface within CleverApp that provides insights and metrics on the performance of automation workflows, allowing users to track key performance indicators and make data-driven decisions.

- **Workflow Templates**: Pre-built automation workflows provided by CleverApp to help users quickly set up common sales automation processes such as lead follow-ups, appointment scheduling, and email campaigns.

- **Integration**: The process of connecting CleverApp with external tools and software such as CRM systems, email marketing platforms, and calendar apps to streamline data exchange and enhance functionality.

- **Lead Scoring**: A methodology used to rank leads based on their likelihood to convert into customers, typically using criteria such as demographics, behavior, and engagement with marketing materials.

- **Custom Fields**: Additional data fields that users can define and customize within CleverApp to capture specific information about leads, contacts, or deals.

- **Multi-channel Engagement**: Engaging leads and customers across multiple communication channels such as email, phone, social media, and live chat to provide a seamless and personalized experience.

- **Sales Pipeline**: A visual representation of the stages that leads go through during the sales process, from initial contact to closing the deal, used to track progress and forecast revenue.

- **Lead Source**: The origin or channel through which a lead was acquired, such as a website form submission, email campaign, referral, or social media interaction.

FAQ

Q: Can I customize the triggers and actions in my automation workflows?

A: Yes, CleverApp provides a flexible interface for defining custom triggers, actions, and conditions to tailor automation workflows to your specific needs.

Q: How can I track the performance of my automation workflows?

A: CleverApp offers an analytics dashboard where you can monitor key metrics such as conversion rates, engagement levels, and revenue generated through automated processes.

Q: Is there a limit to the number of automation workflows I can create?

A: CleverApp does not impose a strict limit on the number of automation workflows you can create. However, we recommend organizing your workflows efficiently to ensure optimal performance.

Q: Can I restrict access to the Sales Automation Module based on user roles?

A: Yes, CleverApp allows administrators to define roles and permissions to control access to features such as the Sales Automation Module. You can configure permissions based on user roles to ensure data security and compliance.

Q: Can I integrate CleverApp with third-party applications such as CRM systems or email marketing platforms?

A: Yes, CleverApp offers seamless integration with a variety of third-party applications, including popular CRM systems like Salesforce and email marketing platforms like Mailchimp. You can configure integrations in CleverApp settings to streamline data exchange and enhance functionality.

Q: Does CleverApp provide templates for automation workflows?

A: Yes, CleverApp offers a library of pre-built workflow templates to help you get started quickly with common automation tasks such as lead nurturing, appointment scheduling, and email campaigns. You can customize these templates to suit your specific requirements.

Q: Can I schedule automation workflows to run at specific times?

A: Yes, CleverApp allows you to schedule automation workflows to run at specific times or intervals. You can set up recurring schedules for tasks such as email follow-ups, reminder notifications, and data updates to automate repetitive tasks and streamline your workflow.

Q: Does CleverApp support multi-channel engagement with leads and customers?

A: Yes, CleverApp enables multi-channel engagement with leads and customers across various communication channels such as email, phone, social media, and live chat. You can create personalized communication sequences and automate responses to engage leads at every stage of the sales process.

Good Software

We'd love to hear from you. If you have questions, feedback, or need support regarding this release, please don't hesitate to reach out to us.

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✉ hello@goodsoftware.com
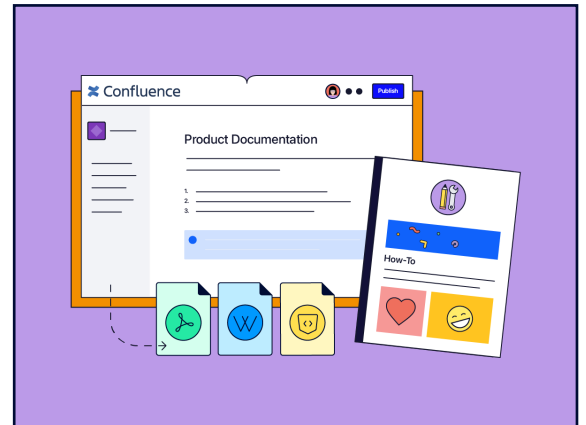
🌐 https://goodsoftware.k15t.dev

We're here to help ensure you get the most from your experience with CleverApp.

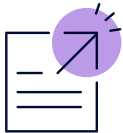# Thanks for Checking Out This PDF Export Example

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