

How To's

ConvergeHub How To section equips business professionals with an explanation on the most common CRM terms and functions. Use it to get an insight into the basics of ConvergeHub, to explore its various features and know the application better.

- Build your first Report
- Build your first Web to Case form and integrate with your website
- Build your first Web to Lead form and integrate with your website
- Check duplicate entries
- Create a new Account
- Create a new Contact
- Create a new Lead - different options of creating leads
- Create DocuSign Integration and how it is used?
- Create Twilio integration and how it is used?
- Create your first Automation rule
- Create your first Campaign
- Create your first Custom fields
- Create your first Social Campaign
- Create your vacation notification mail for your contacts
- Difference between Targets, Lists and Segments
- Different types of Templates available and how to use them
- Gmail Integration
- Google Calendar Integration
- Google Contacts Integration
- How Dropdown values can be updated?
- How Google Apps is integrated?
- How lead conversion takes place?
- How Partner Collaboration works?
- How to add new Users?
- How to enable App from App Store?
- How to organize layouts for custom fields?
- How to use Import functionality?
- Integrate Social links to enrich leads and contacts
- Mass Update
- Need to Assign Leads from one Agent to someone else
- Power of Multichannel marketing
- Power of Summary section
- Quickbooks Offline
- QuickBooks Online
- Quick Reporting feature using Advanced Search
- What is Alert and Notification?
- What is Lead, Account, Contact and Deal?
- What is Library and how it is used?
- What is Mail to ConvergeHub functionality and how it can be used?
- What is Sales Tools and how it is used?