GOBOOSTIFY – QUICK SETUP GUIDELINE

Configure General Settings Tab

Updating the business information in the General Settings Tab is advisable because the information provided there will seamlessly integrate with other parts of the account.

- Go to “Settings” > “Business Profile”
- Add “Business Logo”
- Add any missing information in the fields
- Be sure to click the “Update Information” button on each section in which information is added or changed

Create User Profiles For Staff Members

- Go to “Settings” > “My Staff”
- Click the “Add Employee” button
- Enter “User Info”
- Select the “Calendar” you want this user assigned to
- Click the “Save” button

Note**:** Each user will need to login to his/her account to integrate their personal Google calendar(s) (if applicable).

Setup Phone Number

Purchase a new phone number in order to send & receive phone calls and text messages within the system.

- Go to “Settings” > “Phone Numbers”
- Click the “Add Number” button and select “Add Phone Number” from the dropdown
- Click the “Filter” button, enter your Area Code in the middle field, and in the “Match To” field select “first part of number” and click “Apply”
- Select a number and click the “Proceed to Buy” button
- Click on the Pencil icon next to the Phone Number to Configure the number
- Enter the main business number in the “Forward Calls to” field
- Check the “Call Recording” checkbox to enable it
- Enter a call recording notification message in the “Call Recording” field

- Click the "Save" button
- Complete A2P Verification - A2P registration is a mandatory process that ensures all businesses comply with US regulations in regard to phone calls and text messaging.
    - Go to "Settings" > "Phone Numbers" > "Trust Center" tab
    - Click the "Start Registering Now" button to begin the process
    - Follow the steps to complete the registration submission

Setup Dedicated Email Domain

Strategically leveraging email marketing enhances sales, but caution is vital. We highly recommend a dedicated sending domain for better control, mitigating potential filtering of your messages by email service providers, and optimizing marketing strategies.

- Go to "Settings" > "Email Services"
- Click the 'Create Dedicated Domain" button
- Enter your desired sending sub-domain in the "Enter Domain Name" field (this will be something.yourdomain.com. Common sending sub-domains are mail.yourdomain.com, inbox.yourdomain.com, etc.)
- Click the "Add & Verify" button
- Click the "Continue" button to connect your domain. Depending on your domain registrar, you'll either be prompted to connect and login with your domain registrar so the wizard can automatically configure the new DNS records OR you'll be prompted to manually configure those records in your DNS.
- Click the "Verify Domain" button to see the status of each record. Once all records have been verified, you'll be redirected back to the Email Services tab where you'll see that you're new sending sub-domain is active and that the SSL certificate has been issued (Note: DNS record verification often takes several minutes to complete, so you may have to click "Verify Domain" a few times until all the records are found).

Setup Branded Domain

By default, links generated for items like documents and contracts, invoices, calendars, etc will use the API Domain (e.g. https://link.myagency.com). This is configured in the Agency View > Settings > Company. Setting up Branded Domains within a specific account will replace the API Domain with one that is owned by the company using the account (e.g. https://link.abccompany.com).

- Within the account, go to "Settings" > "Business Profile"

- In the General Information sections, add the domain in the Branded Domain field.
    - Note: this should include a sub-domain (e.g. https://link.abccompany.com)
    - Before clicking the "Update Information" button, be sure to add a CNAME record in the company's DNS. In the example provided, you would add "link" as the host and add "brand.ludicrous.cloud" as where the record points to (sometimes referred to "data" or "answer" as different DNS providers call it different things)
- Once the CNAME record has been added to the DNS, wait at least 60 seconds and then click the "Update Information" button in the Company Profile settings and you should see a success message in the top right of the screen.

Connect the Business Facebook Page & Instagram Account

Integrate the company's Facebook & Instagram pages to activate Facebook Messaging and Instagram DMs within the platform as well as Facebook Review management.

Before connecting the Facebook page to the sub-account, ensure that the Instagram profile is a Business account and that it is connected to the business Facebook page.

- Login to the business's Facebook page
- In GoBoostify, go to "Settings" > "Integrations"
- Click the "Connect" button for the Social option
- Click the 'Continue as [Page Name]" button
- Select the Facebook page you want to connect to this location
- Click the "Connect Facebook & Instagram" button

Connect the Google Business Profile

Google Business Profile is your digital storefront on Google. Connecting Google Business Profile will allow activation of Google Review management as well as Google Business Messaging.

Note: the existing phone number will be automatically moved to the second phone number field in the Google Business Profile.

- Make sure the Google Business Profile has been created and verified in the relevant Google Business Profile account
- Go to "Settings" >"Integrations"
- Click the "Sign in with Google" button

- Choose the appropriate Google account to connect or sign in as needed
- Allow permissions as prompted
- Select the business you want to link to this sub-account from the dropdown menu.
- Check the “Enable GBP call tracking” check box for the “Missed Call Text-Back” feature
- Click the “Connect” button

Setup the Review Request Outreach Email & SMS

Composing Review Request Outreach Email and SMS templates enables users to quickly send review requests to contacts via the Bulk Action on desktop and the Quick Action in mobile. You can also use the “Send Review Request” Workflow action to automate review requests.

- Go to “Settings” > “Reputation Management”
- Setup Review Messages
    - Toggle on the “SMS Review Requests” and “Email Review Requests” and enter customized messages
- Under “Review Link”, select a connected platform (e.g. Google, Facebook)
    - Note: If Google isn’t linked, follow these steps to obtain the accurate link for submitting reviews on a specific Google Business Profile.
    - Click on “Custom Link” and enter a custom URL used for collecting reviews
    - Copy and paste link in the “Setup your custom link” field
    - Click the “Save” button

Activate Review Reply AI

Platforms like Google & Facebook reward businesses who reply to their reviews because it shows that the business is engaged with its customers. Activating Review Reply AI ensures that every review receives a reply.

- Go to “Settings” > “Reputation Management”
- There are two options at the top of the screen: "Suggestive" and "Auto Responses"
    - Choose the mode that best suits the business needs

Connect Stripe

To fully utilize payment features, we suggest integrating Stripe. By doing so, you can leverage the CheckOut element on your website/funnels and accept payments for calendar bookings.

Create Products

If you have products to sell online, you can create standalone or recurring products that can be sold in funnels, websites, forms, and even E-Commerce shops.

- Go to "Payments" > "Products"
- To create a new product, click the "Create Product" button and complete the fields in the page that follows
- To import existing products from the connected Stripe account, click the "Import from Stripe" button
- To manually import from another platform, first download a sample CSV file by clicking the "Import as CSV" button and click the "Download sample CSV" link
    - You can either add to this list manually or copy the data from a CSV export of another platform

Create Proposal Templates

In many cases, a proposal or estimate may be required to begin work on a job or project. Creating a template will standardize the business process and reduce paperwork.

- Go to "Payments" > "Documents & Contracts" > "Templates"
- Click the "New" button and choose to create a new template or upload a pre-existing PDF
    - Note: When choosing to upload a PDF, you will have the ability to overlay fields for collecting data (e.g. Name, Address, Initials, etc) as well as a signature
- Edit the document as desired by click the "+" icon at the top left of the screen and adding elements to build the proposal structure
- Modify the various elements to customize the document
- Click the "Save" button

Create Invoice Templates

The most efficient way to send invoices through GoBoostify is to create templates for standard jobs or projects. There is an option to create a one-time template that could be used for a single job or project type as well as a recurring template that could be used for work performed over a period of time.

- Go to "Payments" > "Invoices" > choose either "Recurring Templates" or "Templates" depending on the business needs
- For Recurring Templates, click on the "+ New" button and choose "Recurring Template"
    - On the page that follows, change the "Frequency Settings" as desired and add the items to be included in this invoice.
      Note: this will pull from the products that were added previously. So, if you don't see the products you need, be sure they are added in "Payments" > "Products"
- For standard Invoice Templates, go to "Payments" > "Invoices" > click on the "+ New Invoice"
    - Add the relevant details and items to be included in the invoice.
      Note: this will pull from the products that were added previously. So, if you don't see the products you need, be sure they are added in "Payments" > "Products"

Setup Custom Values

Custom values are like shortcuts to information that can be referenced in many areas of GoBoostify. A number of these custom values have been added and referenced in places like funnels, websites, and forms. Entering the values specific to this particular business will ensure there are no mistakes and that if something changes, like a phone number or even the business name, it won't have to be updated in multiple places.

- Go to "Settings" > "Custom Values"
- This page will display a list of custom values that have already been added.
- Click on the three dots icon on each of the lines and select "Edit Custom Value"
- The "Name" field is for internal reference. The "Value" field is what will be referenced when displaying the custom value in places like funnels, websites, forms, etc.
- Add or update the corresponding information to the "Value" field and then click the "Update" button!

Enable Missed Call Text Back

Did you know that, statistically, local businesses miss more than 50% of their inbound phone calls? The Missed-Call Text-Back is the simplest way to capture leads who would have gone on to call a competitor.

You can enable this setting in under 30 seconds and the system will immediately text people who call but don't get an answer saying: "Sorry we missed your call. How can we help?"

- Go to "Settings" > "Business Profile"
- Scroll to the bottom of the page on the right side and check the box in the "Missed Call Text Back" section
- Enter the message that's most appropriate for the business. This is also configured in the automation section in the Missed Call Text Back workflow
- Note: Be sure to test this feature by using the built-in testing field in the settings

Creating Forms

- Go to "Sites" > "Forms" > "Form Builder"
- Click the "Marketing Form - Claim Offer" form
- Once the form builder opens, you edit the form fields and/or add new form fields and elements as desired
- Click the "Save" button when finished

Calendar Configuration & Integration

- Go to "Calendars" > "Calendar Settings" where you'll find the calendars that came with this Snapshot
- Click the three-dots icon > Edit to edit the details of each calendar

Configure Funnel

- Go to “Sites” > “Funnels” >“Search for the funnel template that best fits your niche”
- Click the “Edit” button to edit the specific "Step" (page) in the funnel
- Scroll through the page and edit as needed
- Click “Save” at the top right corner before exiting
- Then click "Publish" when you are ready to push the changes live to the internet

Configure Website

- Go to "Sites" > "Websites" > "Search for website template that best fits your niche"
- Find the 'Home' page and click on "Edit"
- Scroll down to each section and edit content as needed.
- Review and update hyperlinks links
- Update Social Media links
- Click "Save" at the top right corner before exiting.

Activate Domain

If you have configured the templated website in the steps above and want to send it live on a domain, follow the instructions below.

Disclaimer: If your website url is currently being used with an existing website, following the steps below will replace your existing website with a GoBoostigy website (or funnel).

- Go to "Settings" > "Domains"
- Enter your desired domain or sub-domain in the "Enter Domain Name" field (this will be *something.yourdomain.com* or *yourdomain.com*.
- Click the "Add & Verify" button
- Click the "Continue" button to connect your domain. Depending on your domain registrar, you'll either be prompted to connect and login with your domain registrar so the wizard can automatically configure the new DNS records or you'll be prompted to manually configure those records in your DNS.
- Click the "Verify Domain" button to verify the status. Once the record has been verified, you'll be prompted to select a website and default homepage for this domain. (Note: DNS record verification often takes several minutes to complete, so you may have to click "Verify Domain" a few times until all the records are found).

Review Pipelines

Pipelines are a powerful way to visualize and track progress in your sales process, and you'll be able to monitor the progress of new Opportunities as you start generating leads. A few pipelines have already been created but you can edit them as needed.

- Go to "Opportunities" > "Pipelines"
- Select A Pipeline > click pencil icon to edit
- Make updates as needed
- Click the Save button

Create a Personal Calendar

The Calendar is a powerful tool, allowing customers to easily schedule their appointments without the need for a lengthy email conversation.

- Go to Calendar Settings.
- Click on Create Calendar.
- Choose Personal Booking and configure the calendar based on your preferences.

Create a Service Calendar

Within the Calendars section is a powerful feature called "Service Calendars." These are set up with several basic types of services and it allows for a wide variety of control including the ability to assign specific staff members to services and the equipment needed to perform each service. To start, follow these steps to update and review some of the details.

Step 1: Navigate to Calendar Settings and Input the Essentials

- Go to Calendars > Calendar Settings
- Within the Calendars Tab, click "Create Calendar," then choose the "Service Calendar" option.
- **Input the Essentials:** Provide the necessary information for your service calendar such as:
- **Service Name**: Give your calendar a descriptive name.
- **Service Description**: Add a brief description to help users understand the purpose of the calendar.
- **Staff Assignment and Location:** Select the staff members who will be assigned to the service you're creating the calendar for. Once staff members are selected for a service calendar, you can configure their preferred meeting location from the advanced settings. Available Meeting Locations:
    1. **Phone:** The default value populated will be the subaccount's phone number, but you can edit it to any phone number of your choice.
    2. **Address:** The default value populated will be the subaccount's business address, but you can edit it to any address if needed.
    3. **Custom:** Use this to enter any custom value, such as your store address, a message for clients, or a static Zoom link.
    4. **Zoom:** Dynamic, unique Zoom links will be generated if Zoom is successfully integrated. Ensure Zoom is integrated in 'My Profile' > Calendar Settings > Video Conferencing.

5. **Google Meet:** Dynamic, unique Google Meet links will be generated if Google is successfully integrated and Google Calendar is selected as the linked calendar in the 'My Profile > Calendar Settings' section.

- **URL / Slug:** Define a calendar slug or URL that will determine the link to your calendar.
- **Duration:** Specify the duration of your service
- **Availability:** Set your calendar's availability
- You can customize your service calendar further with Advanced Options. Simply click on Advanced Settings Button

Step 2: Service Details

- Upload your **Service Logo** - This is the image that will appear on the Appointment Booking Widget for your Service Calendar
- **Link to Service Menu:** If you intend to add this Service Calendar to your Service Menu (where all your services are showcased on one page), ensure you select a group for the calendar. Think of a group as a way to categorize similar services together. For example, you could create a group named "HAIR" and assign service calendars like "Hair Cut," "Hair Spa," and "Hair Coloring" to it.

Step 3: Availability

- **Weekly Working Hours:** Set your regular, weekly working hours. This is useful for setting up your default schedule that repeats week after week.
- **Date Specific Hours:** Set Date specific hours that allow you to customize your availability or unavailability for specific dates. You can add specific dates and define hours applicable only to those dates.
- **Service Duration:** Set the length of each appointment.
- **Service Interval:** Specify your service interval.
- **Post Buffer time:** Add extra time after appointments for preparation or transition.
- **Minimum Scheduling Notice:** Set the required advance notice for appointment bookings, specifying how many hours or days before an appointment should the booking be closed.
- **Date Range:** Define how many days into the future appointments can be booked.

Step 4: Forms & Payments

- **Forms -** You have the flexibility to choose how you gather client information. You can either opt for the default form, which collects standard details like Name, Email, and Phone number, or create a custom form tailored to your specific needs. To use a custom form, create it in Sites > Forms > Builder, and then select it from the dropdown menu on the calendar. You can also:

- Toggle the consent checkbox on/off.
- Customize the consent message.

- **Confirmation Page -** After an appointment is booked, you can decide how you'd like to present the confirmation to the user. You can choose between displaying a thank you message on the same page or redirecting the user to a specific URL of your choice.
- **Payments -** If you want to accept payments for bookings, ensure that your payment gateway is integrated. Once set up, you can specify the payment amount and start collecting payments. It's important to note that payments are only applicable to the main attendee and not for guests.

Step 5: Save Your Settings

Review and Activate Workflows

All automations are handled in the Workflows section. We have included 12 workflows in this.

- "New Lead" - Customize, Review, and Activate
- "Appointment, Confirmations & Reminders" - Customize, Review, and Activate
- "Appointment No Show" - Customize, Review, and Activate
- "Appointment Complete" - Customize, Review, and Activate
- "Do Not Contact" - Customize, Review, and Activate
- "New Lead" - Customize, Review, and Activate
- "Missed Call Text Back" - Customize, Review, and Activate
- "New Lead Nurture" - Customize, Review, and Activate
- "Database Reviews Reactivation" - Customize, Review, and Activate
- "Facebook Comment Response" - Customize, Review, and Activate
- "Instagram Comment Auto Reply" - Customize, Review, and Activate
- "Send Review Request" - Customize, Review, and Activate

Launch Your Business