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| Alan Bradford AlanCo, Inc. 1225 Wutheri Wilson Rivers United States | ng Heights R Township, N | d linnesota |
| m (630) 253 | 3-8502 | |
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Overview & How To Use

turboDial Mobile



The Problem ...

- You need to automatically document all sales calls in Infusionsoft
- You need to consistently display your business phone identity for all client conversations
- You need quick follow up on new leads

You need all of those, even while away from your desk and computer



turboDial Mobile

- turboDial for Mobile Devices
 - Apple iOS (Safari), Android (Chrome)
 - Smartphones, Tablets
- Operates independently from Infusionsoft
- turboDial Features:
 - Choose your Caller ID and Calling Device
 - Search & select any Infusionsoft contact
 - Make Calls, Send Text Messages
 - Save Call Outcomes & Notes
 - Apply Tags
- Bonus: Works with PCs & Macs too
 - IE, FireFox, Chrome, Safari, Opera

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Mobile Flexibility

- Use any connected device to <u>manage</u> outbound calls
 - Smartphone, Tablet, PC, Mac
- Use any phone to make your calls
 - Mobile phone, Office phone, Home phone, Hotel room phone, Pay phone ...
- The same smartphone can be used to both manage and make your calls

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TLRB@⊃IAL turboDial's Benefits → Mobile

- Maintain your business identity to the customer
 - Any phone masquerades as your Business line
- Track your calls & text messages in Infusionsoft
 - Notes on the Contact Record
 - Call Outcome designations
 - Dashboard reports
- Trigger automated follow-up
 - Call Outcome Automation
 - Tags

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Using turboDial Mobile

- Getting Started
 - Authorize
 - Launch
- Quick Demos:
 - Login
 - Configure
 - Search
 - Send SMS Text Messages
 - Apply Tags
 - Make Calls
- Comparison:
 - Mobile vs PC/Mac version
- Useful Tips

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Authorize Users

- Each Mobile User must be pre-authorized by your Account Owner
- Use the Add/Remove Mobile Users form at:
 - <u>https://sd123.customerhub.net</u>
- Monthly subscription fee is adjusted for each User added or removed
- Account Owner: consider if the User is best suited for the PC/Mac version, the Mobile version, or both



TLRB@DIAL

Launch

- Open your device browser
 - iOS: Safari
 - Android: Chrome
 - The built-in browser on Android devices is not supported
- Access turboDial Mobile at:
 - <u>https://turbodial.biz/tf/mob</u>

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|--|
| bill@web-lever.com |
| Alan Bradford AlanCo, Inc. 1225 Wuthering Heights Rd Wilson Rivers Township, Minnesota United States |
| m (630) 253-8502 |
| CALL O SMS Caller ID: +16129992889 Calling Device: +16085652042 SMS ID: +16129992889 |
| Call Notes |
| Call Outcome SAVE |
| Search |

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Screen Flow

Login Config Search Call

TLRB@DIAL

Login Screen

- Must be pre-authorized by your turboDial Account Owner
- Enter your Infusionsoft app name
- Login using a valid Infusionsoft ID
 - Email & Password
- App name, email and password will usually be remembered
- turboDial will auto-login if you have recently logged in
 - Moves directly to Configure or Search screen

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| TLRBOJAL | |
| LOGIN | |
| Infusionsoft App Name: http://wl116infusionsoft.com | |
| Email: bill@web-lever.com | |
| Password: | |
| Login Login Using a Valid Infusionsoft ID | |



Configure Screen

- Choices are identical to your PC/Mac turboDial configuration
- Caller ID:
 - The number displayed to the people you call
- Calling Device:
 - The phone you will call from
 - 'This PC' is not an option
 - Choose 'Enter Number' to provide a number not in your list
 - To call from the Smartphone you are using for turboDial Mobile – just choose or enter its number
- SMS From ID:
 - The number your text messages will be from

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| | | Search | |



Mobile Flexibility

- Use any connected device to <u>manage</u> outbound calls
 - Smartphone, Tablet, PC, Mac
- Use any phone to make your calls
 - Your Calling Device
 - Mobile phone, Home phone, Hotel room phone, Pay phone ...
- The same smartphone can be used to both manage and make your calls

| Caller ID: +16129992889 Calling Device: +16302538502 SMS From ID: | <image/> CONFIGURE DIMENDING CONFIGURE Caller ID: +16129992889 Calling Device: +16302538502 SMS From ID: +16129992889 | ●●●○ Verizon 훅 | 2:16 PM | -1 🕴 65% | |
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| | Soarch N | | | | |
| | | | | Search | |



Search Screen

- Same search function as PC/Mac version
- Example Contact searches
 - al br a name
 - 630 a phone number
 - *@gmail
 an email address
- Up to 20 results can be returned
- Choose one result from the selector

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| Name, Ema | il or Phone | e: GO |
| 3 Results: | | |
| Alan Bradfo | rd : 1225 Wi | uthering He |
| Selected Co Alan Bradford 1225 Wutherin Wilson Rivers alanb@timefu (630) 253-850 | ontact: ng Heights F Township usion.biz 02 | Rd |
| | | |

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Call Screen

- Functionally similar to the PC/Mac version
- Choose a Number
- To Make a Call:
 - Click "Call" or the Call & Record Button
- After the Call:
 - Enter Notes
 - Choose an Outcome
 - Click the "Save" Button

| ●●●○○ Verizon 🗢 9:46 AM |
|---|
| bill@web-lever.com |
| Alan Bradford AlanCo, Inc. 1225 Wuthering Heights Rd Wilson Rivers Township, Minnesota United States |
| m (630) 253-8502 |
| CALL SMS Caller ID: +16129992889 SMS ID: +16129992889 Calling Device: +16085652042 SMS ID: +16129992889 |
| Call Notes |
| Call Outcome SAVE |
| Search |

TLRB@JIAL

Call Screen

- To Send a Text:
 - Click the "SMS" Button
 - The "SMS View & Send" screen will appear

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| bill@web-lever.com | 0 |
| Alan Bradford AlanCo, Inc. 1225 Wuthering Heights Rd Wilson Rivers Township, Minnesota United States | |
| m (630) 253-8502 | |
| CALL O SMS Caller ID: +16129992889 Calling Device: +16085652042 | 9 |
| Call Notes | |
| Call Outcome SAVE | |
| Search | |



Text Message Screen

- Functionally identical to PC/Mac version
- View Messaging History
- To Send a Text:
 - Type the message into the window
 - Click the "Send" Button
- Close this window by clicking the X in the upper-right

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|--|
| TLRB©DIAL bill@web-lever.com |
| SMS View & Send Contact: Alan Bradford (AlanCo, Inc.) Mobile: <u>+16302538502</u> |
| Message |
| Sun, 21 Jun 2015 17:18:46 -0500 Test ok |
| Sun, 21 Jun 2015 17:18:34 -0500 |
| Sent By: Bill Jenkins - delivered |
| Wed, 17 Jun 2015 23:26:23 -0500 Wut? |

TLRB@JIAL

Call Screen

- View the Contact's current Tags
 - Scroll to bottom of Screen
- To Add a Tag:
 - Click the Add Tag Button
 - The "Add Tags" screen will appear
 - The Add Tag Button will not appear if your account owner has disabled this feature

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|---|
| bill@web-lever.com |
| Call Outcome SAVE |
| Current CustomerRecycle 0Stop 0Stop 3Stop 5Spouse Is A ClientSpouse Is Not A ClientSaved Cross Sell Search 1Saved Cross Sell Search 2 |
| Saved Cross Sell Search 3 |
| Boat/Watercraft Flexible Fixed Annuity |
| Registered Referral Partner |
| Auto & Home Package |
| Temp Remove from List tD Testing |
| WIDGET SALE email open |
| Search |



Add Tags Screen

- Functionally similar to the PC/Mac Version
- View the Contact's current Tags
- To Add a Tag:
 - Choose Tag from the Selector
 - Click the "Save" Button

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| bill@web-lever.com |
| ADD TAGS |
| Search 200 Tags SAVE |
| Current CustomerRecycle 0Stop 0Stop 3Stop 5Spouse Is A Client |
| Spouse Is Not A Client |
| Saved Cross Sell Search 1 |
| Saved Cross Sell Search 2 |
| Saved Cross Sell Search 3 |
| Boat/Watercraft Flexible Fixed Annuity |
| Registered Referral Partner |
| Auto & Home Package |
| Temp Remove from List tD Testing |
| Call Search |

TCRB®DIAL Mobile vs PC/Mac Version

- PC/Mac version:
 - Used side-by-side with Infusionsoft
 - Supports Firefox & Chrome browsers
 - Supports Desktop & Laptop PCs & Macs
 - Supports VoIP calling from your computer
 - Account configuration tools
- Mobile version:
 - Launch independently from Infusionsoft
 - Supports Firefox, Chrome, Safari, Opera, Internet Explorer
 - Supports PCs, Macs, Smartphones, Tablets
 - No VoIP support. Call from phones only
 - No account configuration tools
- Some Users may only need the Mobile version for all purposes
- <u>Cannot use both versions simultaneously</u>





Useful Tips

- "Save to Home Screen" for a better experience
- When in doubt ... Log out
 - Clears cached data
- Using only a Smartphone?
 - Does your service have simultaneous voice and data?
 - If not you need to wait until a call ends before resuming use of turboDial



TLRB@JAL



Mobile Screen Flow



Add Tags

Auto & Home Package Temp Remove from List [1D Testing] Search

< Call

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|--|--|
| Alan Bradford AlanCo, Inc. 1225 Wuthering Heights Rd Wilson Rivers Township, Minnesota United States | |
| m (630) 253-8502 (CALL © Caller ID: +16129992889 Devicer: +16129992889 SMS ID: +16129992889 | |
| Calling Device. House | |
| Call Outcome SAVE | |
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