Velocify Setup Guide

A. Before Installation

Before beginning the installation, please verify the following:

- You have manager permissions on your Velocify organization.
- Your Conversica account is provisioned and ready for use.
- You have established contact with your Conversica Technical Account Manager.

B. Create Admin User

- Navigate to Menu > Administration > Manage Users > Add New User.
- Create a new user with a name of your choice and an email address that you own.
  - A verification email will be sent to that email address. Follow the link and create a password for that user.
- On the Manage Users page, find the new user and navigate to Options > Roles.
- Add “Administrator” to the Roles assigned to the new user.

C. Connect Velocify with Conversica

At this point, you will notify Conversica that it is time to connect the two systems using the API. Please contact your Technical Account Manager to complete this step. When contacting them, please provide the email address and password associated with the new user.

D. Conversica Custom Lead Fields

Once your Conversica service has been activated, we will automatically add a custom field group called “Conversica” in your Velocify account. This group will include the following fields for each lead:

Friendly Label	Type	Description
Conversica Conversation	Long Text	Incoming and outgoing messages to the lead
Conversica Discovered Phone 1	Phone	The lead's phone number found by Conversica

Conversica Discovered Phone 2	Phone	The lead's phone number found by Conversica

Conversica Do Not Email	Checkbox	Indicates if the lead has requested not to be contacted
Conversica Hot Lead	Checkbox	Indicates the lead is ready to be contacted by a sales rep
Conversica Hot Lead Date	DateTime	The date and time at which the lead became "Hot" in Conversica
Conversica Action Required	Checkbox	Indicates this lead requires some action taken by a sales rep
Conversica Action Required Date	DateTime	The date and time at which it was determined that Action is Required
Conversica Further Action	Checkbox	Indicates this lead requires some action taken by a sales rep
Conversica Further Action Date	DateTime	The date and time at which it was determined that further action is required
Conversica Continue Messaging	Checkbox	Indicates whether Conversica will continue to contact the lead
Conversica Lead at Risk	Checkbox	Indicates The lead may lose interest if not contacted by a sales rep
Conversica Lead at Risk Date	DateTime	The date and time at which the lead became "At Risk" in Conversica
Conversica Most Recent Response	Long Text	The lead’s most recent response to a Conversica message
Conversica Lead Status	Text	The lead’s status in Conversica
Conversica Lead Status Date	DateTime	The date and time the lead’s status changed
Conversica Conversation Stage	Text	The current stage of the Conversica conversation

Conversica Conversation Stage Date	DateTime	The date and time at which the lead's status changed
Conversica Conversation Status	Text	The current status of the Conversica conversation
Conversica Conversation Status Date	DateTime	The date and time that the current Conversica status was set

Conversica Stop	Checkbox	Check this to cancel all future Conversica communication with this lead. NOTE: Once checked, this operation cannot be reversed.
Conversica Skip To Follow Up	Checkbox	Check this to jump Conversica's messaging to the follow-up stage. NOTE: Once checked, this operation cannot be reversed.
Conversica Dialogue	Text	Fill this with the name of the Conversica Dialogue on which this lead will be worked
Conversica Date Added	DateTime	The date the Lead was first added to Conversica
Conversica Discovered Email 1	Text	If a new email address is discovered in a Lead's response, this field will be populated with the additional email address
Conversica Discovered Email 2	Text	If a new email address is discovered in a Lead's response, this field will be populated with the additional email address
Conversica Discovered Name	Text	If a new first name is discovered in a Lead's response, this field will be populated with the preferred first name
Conversica First Message Date	DateTime	Date and time the Lead was sent their first Conversica email

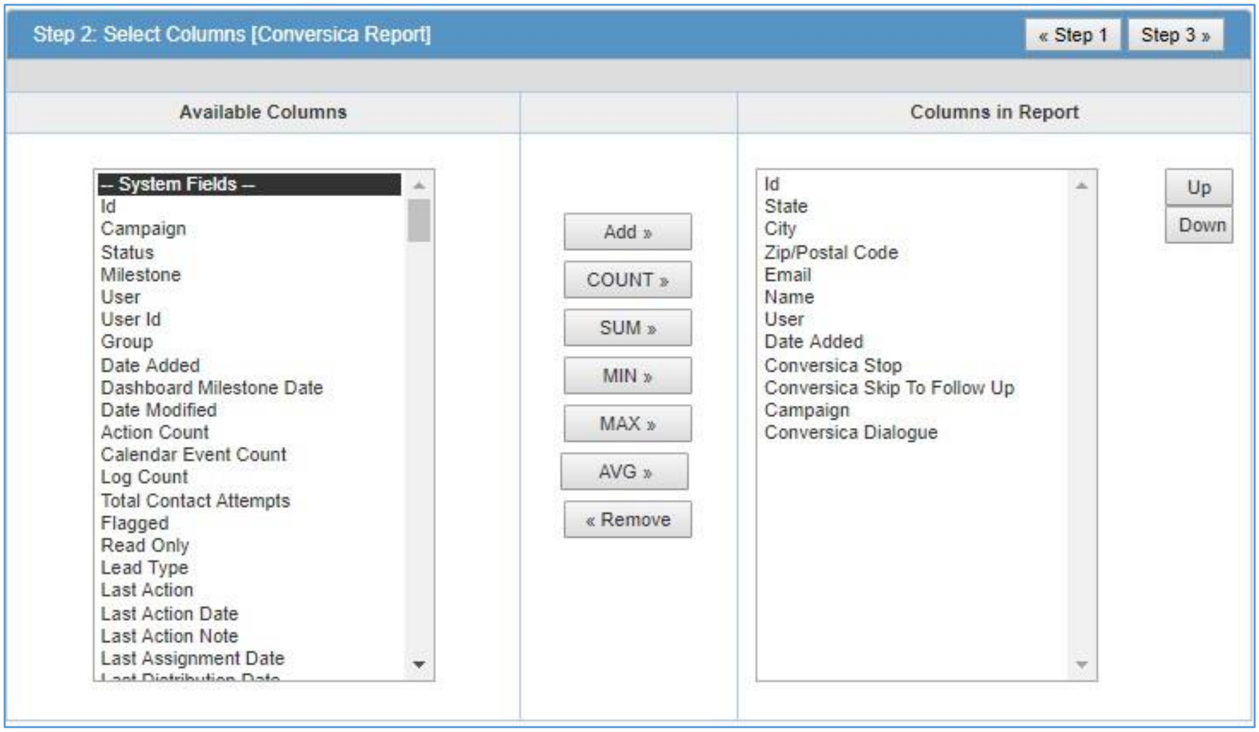
Conversica Last Message Date	DateTime	Date and time the Lead was sent their most recent Conversica email.
Conversica Last Response Date	DateTime	Date and time the Lead last replied to Conversica
Conversica Lead Profile	Text	A link to the Conversica Lead Profile page for the selected Lead
Conversica SMS Opt Out	Checkbox	Checked if the Lead indicates they would no longer like to be messaged
		via SMS after having previously opted in
Conversica Further Action	Checkbox	Checked if the Lead replied in a manner that Conversica has identified needs to be reviewed by a rep. Conversica will no longer message this Lead unless they reply and indicate interest
Conversica Further Action Date	DateTime	Date and time a Lead was last flagged as needing further Action

E. Create a report and Synchronize Lead Data with Conversica

In order to sync leads, Conversica will access your Velocify account using the user you created earlier and running a report that will look for leads that have a value in the “Conversica Dialogue” field. Populate the “Conversica Dialogue” field with the name of the Conversica Conversation ID on which the lead will be worked.

You will need to create a report that contains the following columns:

- Id
- State
- City
- Zip/Postal Code
- Email
- Name
- User
- Date Added
- Conversica Stop
- Conversica Skip to Follow Up
- Campaign
- Conversica Dialogue



NOTE: *The "User" field will be used for rep assignment. These users will need to be added into the Conversica dashboard. Let your Conversica Technical Account Manager know if you use an alternate name for any of the fields above.*

Once the columns are added, you will set a filter in the report for leads whose Conversica Dialogue field contains the word "Conversica." You will also want to add a filter to exclude any Do Not Email requests. Once this report is created, send the report ID to your Conversica Technical Account Manager as well as the field name of your Do Not Email field if you have one.

Should you have any questions or issues, please don't hesitate to connect with your Conversica Technical Account Manager: email Enterprise_CS@conversica.com or call (888) 633-7738.

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