

Q&A from Webinar on August 2, 2017

How to Leverage the Toastmasters Lead Management (TLM) System

Questions	Answers
I can't access my leads right now.	PLEASE NOTE: We are making updates to the TLM this week (8/1-8/4). Access to your leads (opportunities) is on-hold until the changes are complete. We will send out an email notice once complete. Thank you for your patience and understanding.
Who has access to the TLM? Who decides?	The three users assigned and registered. The district decides on who these three users should be based on who is going to actively be managing the leads. The CGD is required.
How many users can each district have for access in the TLM?	Each district gets three (3) users.
Who do we reach out to for Technical Support?	For technical questions such as receiving errors or setting up your SMTP server, you can reach out to Insightly's technical Support Team at Support@Insightly.com . Toastmasters 'How to' questions can be sent to Sonia Dowuona at corporaterelations@toastmasters.org
How do you change email address for log in?	Request email changes from corporaterelations@toastmasters.org
Is this training today recorded?	Yes, here is the webinar recording: https://attendee.gotowebinar.com/recording/8161101252347102979
Can you please share the TLM link?	www.insightly.com
How do you add additional users or change users, so they can use Insightly and is there a limit?	<p>Yes, if you would like to add or change to the users, submit the name, title and email of the user that you would like to replace the old user with to corporaterelations@toastmasters.org. There is a limit of 3 users per district. Please keep in mind that we will make the change after first receiving approval from the DD.</p> <p>Tip: If you have a more that three people who need access (ex. a group of CEC's), you can create a group email account and submit that email address to count as one (1) user.</p>

Is there an option to assign a lead to multiple users within a District?	No, each Lead will only have one Responsible User. That said, everyone within your district should have access to view/edit this Lead.
What is OFAC?	The Office of Foreign Assets Control ("OFAC")
Are we going to get the opportunity tab back?	No, all of the information that was in the Opportunity tab is now going to be in the Leads tab.
For older records not completed by the previous CGDs - should we be required to complete those? I'm looking at incomplete records and the work looks daunting. Is there a way to correlate them so that we know if the club chartered even though the record in Insightly doesn't indicate this?	To clean up the older records it will need to be done manually. Although, we can provide you with a list of chartered clubs for your district. To do this, email listrequest@toastmasters.org and specify your district, your role and timeframe for charter date you are looking for.
Can non-trio members access Insightly? Meaning if I assign a task to a member who is helping with the lead, but isn't a trio member; can they log in and update tasks, meetings, etc.?	Only TLM users (whoever you have set-up as part of your three users) have access to the system.
What do you mean by "event"? (demo meeting, conferences, others)?	Correct. Any event that has to do with that lead.
Is there a way to only see my districts leads?	Yes, once the updates are complete, each district will only see their districts leads.
How will TI be entering the lead? What lead status will they be placing the lead in? Also, what is going to happen to all of our existing opportunities?	Leads will be available in the 'Leads' tab. Each new lead will have the status 'Not Contacted'. All existing opportunities will be available in the Leads tab once the update is complete.
Can we add tasks via email?	You can create Tasks from saved emails by logging into Insightly > going to the Emails tab on the left > selecting an email > selecting the Actions menu at the top > and selecting "Create Task from Email".

Can reports be automatically generated and emailed to specific emails?	Yes, go to Report Schedule in Reports to set-up.
Can leads be added directly from a web form on another site?	Not at this time.
What log in credentials are you talking about when setting up email?	If you are adding an email, you will need to use your login information that is associated with that email. This allows you to send emails out of Insightly through your personal email.
Will all Insightly users from a District have access to all the leads for their District?	Yes, the each district team of three will have visibility to all of the leads. Leads are assigned to the CGD and the CGD can reassign the leads to the rest of the team as they see fit.
When we receive a lead and someone simply wants to find a new club, what lead status should we use?	Use lead status: '2 - Disqualified' and add then fill out the field called 'Disqualified Reasons' and select the 'Find/Join a Club' option.
I noticed when you were completing a filter search you did not put spaces between your words, is that important?	Good catch. The example where I did not add a space was when I was filtering by the Lead status "NotContacted". The only reason I did it this way is because I remembered that this status was added without a space. If the status was added as "Not Contacted" with the space, I would have entered it this way. Whenever you are doing a keyword search, the spelling/spacing should be entered as it appears for that record.
Question from a Region Advisor... do RA's have access to this tool?	No, only districts have user access to the TLM.
Is there an Insightly App?	Yes, there is an Insightly app
Does the Mobile App work the same functionally?	Insightly's mobile app can perform most of the same functionality as the web app, with a few exceptions. One exception, for example, is that you cannot create Custom Filters in the mobile app. You can create Leads, edit them, change their statuses, add/complete Tasks, add Files & Notes etc in the mobile app.
What does TLM mean?	Toastmasters Lead Management