Q&A from Webinar on September 20, 2017

How to Leverage the Toastmasters Lead Management (TLM) System #2

Questions	Answers
Adding my Gmail account gives Insightly permission to: read, send, delete emails, view and manage Drive files, manage contacts, and manage calendars. Is there another method to email from the system without my Gmail account giving Insightly such access?	Yes, when logging into Insightly make sure to sign in with your email address and password, do not "Log in with G Suite."
Can Insightly default to "All Open Leads" once logged in?	Yes, once you set-up a filter it should re-open with that same filter each time you log in. If it doesn't, it may be based on your browser settings.
Did the mass migration override the original lead source?	Yes
Will a recording of the webinar be sent out?	Yes, a recording of all webinars will be emailed after the webinar. Also, all webinars are on-demand to watch at any time. The links to all webinars are located on the CGD Checklist.
When exporting leads to Excel, the template in Excel mixes all the columns with comments. Is there a specific process to export the leads to Excel?	Once exporting a report using the "Actions" button, make sure to select "Export to Excel." This will organize all fields within the lead record in corresponding columns.
Are we supposed to see only our leads when we log into Insightly?	Yes, you have access to view only your districts' leads. To set the Home tab to view your leads only, filter by "Me" and this setting should save for the next use.
Is there a way to send massive e-mails to leads?	Yes, select the leads (you can select all using the checkbox at the top left) and then select the email button to send a massive email. You can also add up to 50 leads in the "Send To" field when working directly from an email template.
Is the TLM system still in going through updates or is it available for use?	The system is ready for use and has been as of August 16, 2017.
How are does a user get notified when a new lead is assigned?	To receive email notifications of assigned leads, make sure to select the appropriate box in the Notification section of User Settings.

Should I contact the lead before changing the status to Contacted and before adding tasks? Should tasks be added when the lead status is NotContacted?	Yes, contact the lead before changing the status. Add tasks after changing the status from NotContacted and after contacting the lead.
Can a Lead's details be transferred into the Club Charter Forms?	No, a Lead's details cannot be transferred to the Club Charter Forms because the form is not connected to the TLM.
Since District Directors are not the Record Owner or User Responsible, how can they receive notifications to keep track of each Lead's status?	All district TLM users are able to use the filter option or create a report to keep track of the club building process. The User Responsible can also create a report to share with other users and team members. For example: Create a weekly report that has all of the information that is relevant and has the specific parameters to the DD. You can also schedule an automatically generated report send to you or them if they are set-up as a TLM user.