ONE MARKET PLACE

Click-to-Build

Recommended Web Browsers:

- Windows Computer: Chrome, Outlook, Edge
- Apple Computer: Chrome, Safari (Firefox is not recommended)

Welcome to Click-To-Build

Click-To-Build helps you follow up with prospects without guessing what to say or when to say it. We build a 90-day sequence of emails with subjects, messages, and send dates, then send them for you from your own inbox. You set it up once and we handle the follow-ups automatically.
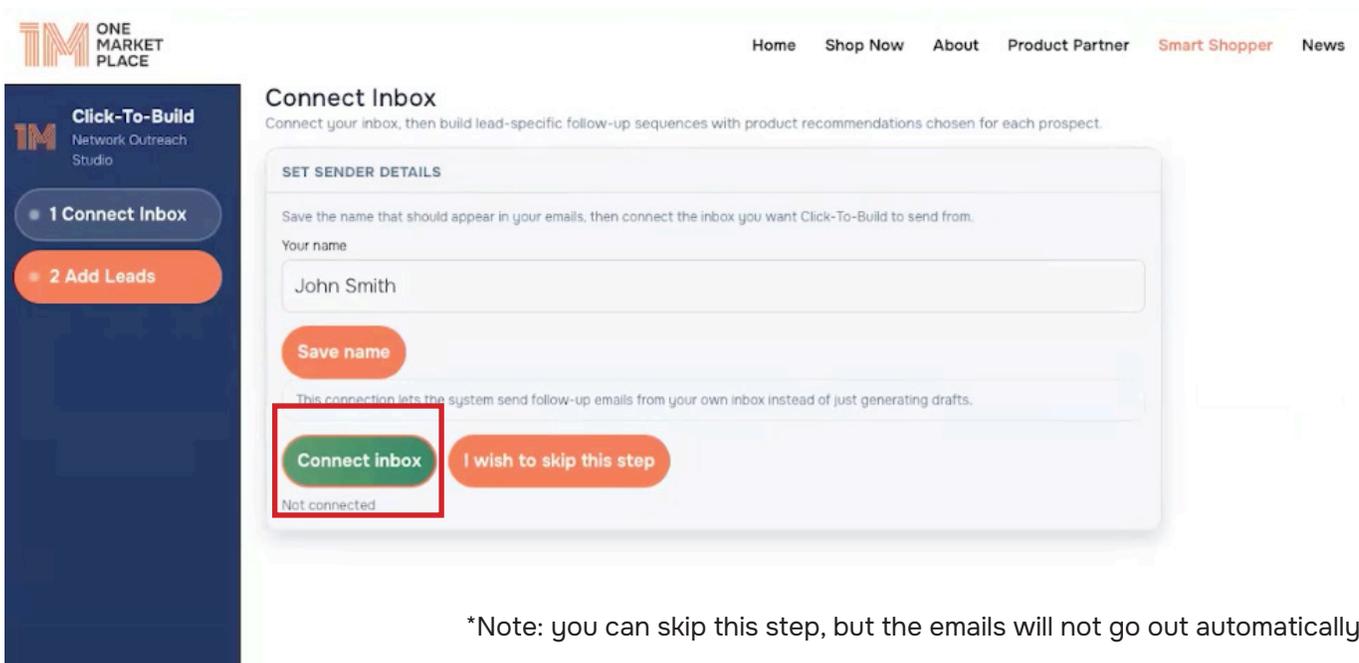
Connect Your Inbox

The Inbox page is where you connect the email account you want Click-To-Build to use for sending. Nothing is connected from this modal. When you are ready, go to the main Inbox screen and complete the connection there.

Add Leads And Products

Use the main Leads page for everything: add the person's details, choose the products for that lead, generate the timeline, and review or edit the emails before they go out.

Step 1. Set Sender Details and Connect your Inbox.

- Put your name in the box and choose "Save Name"
- Click on the "Connect Inbox" button.

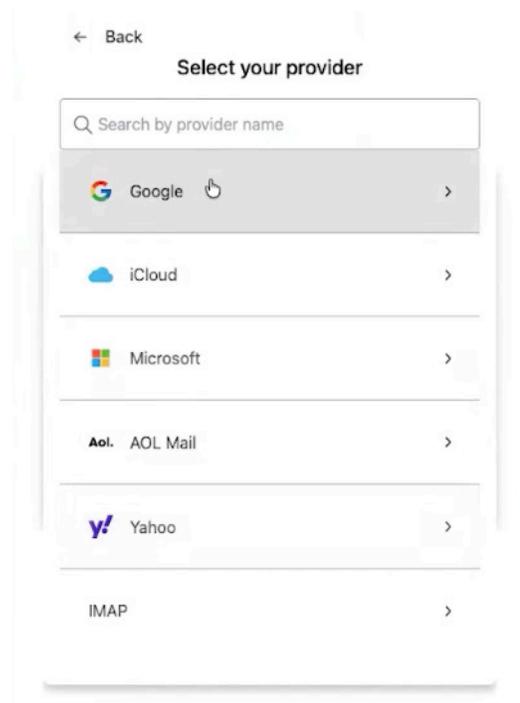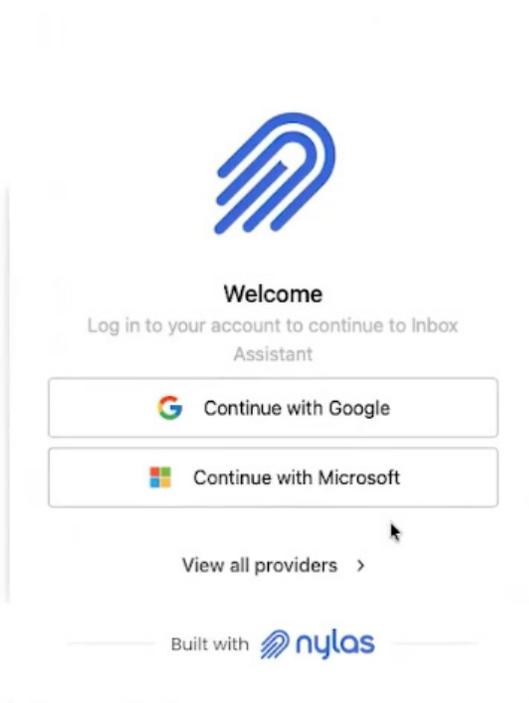*Note: you can skip this step, but the emails will not go out automatically.

Connect your Email:

Click the Connect Window. Make sure any pop up window blockers are turned off. Once the system is set up you can turn those back on.
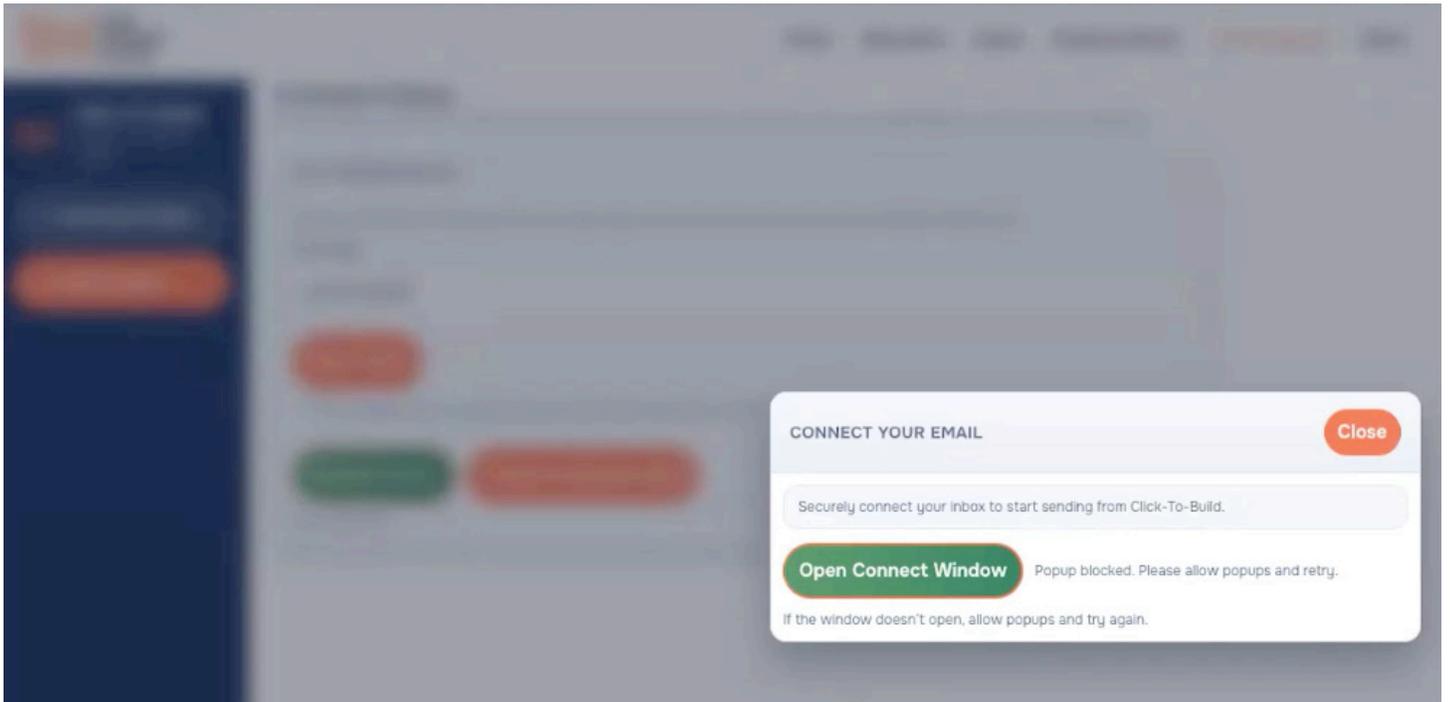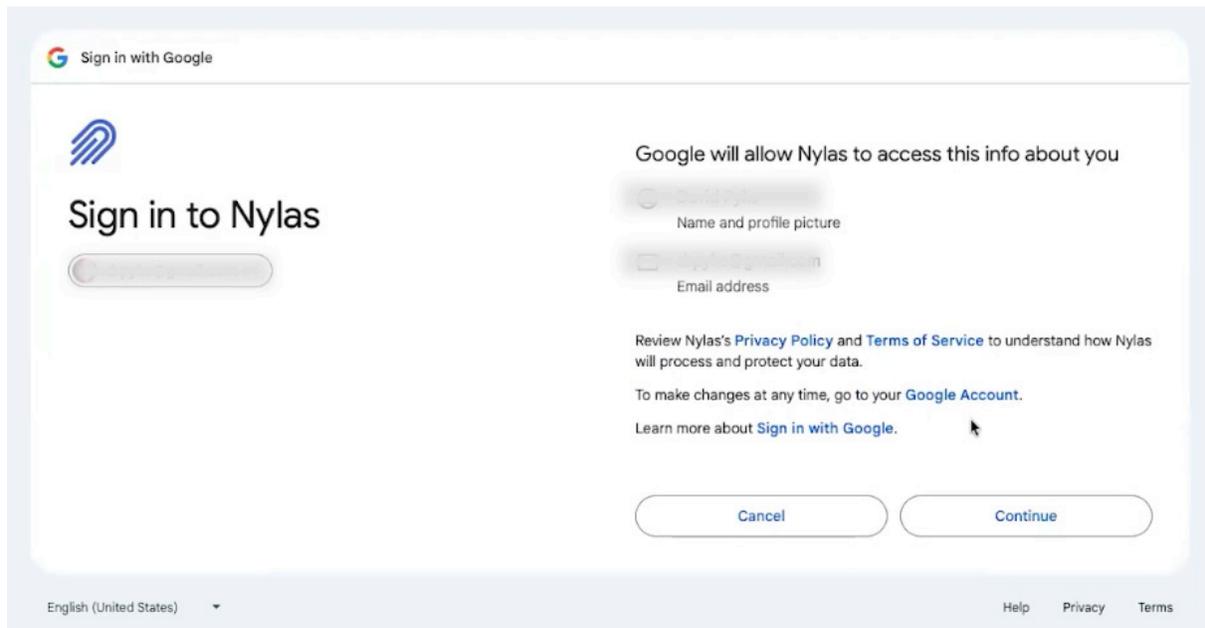

Choose your service provider:
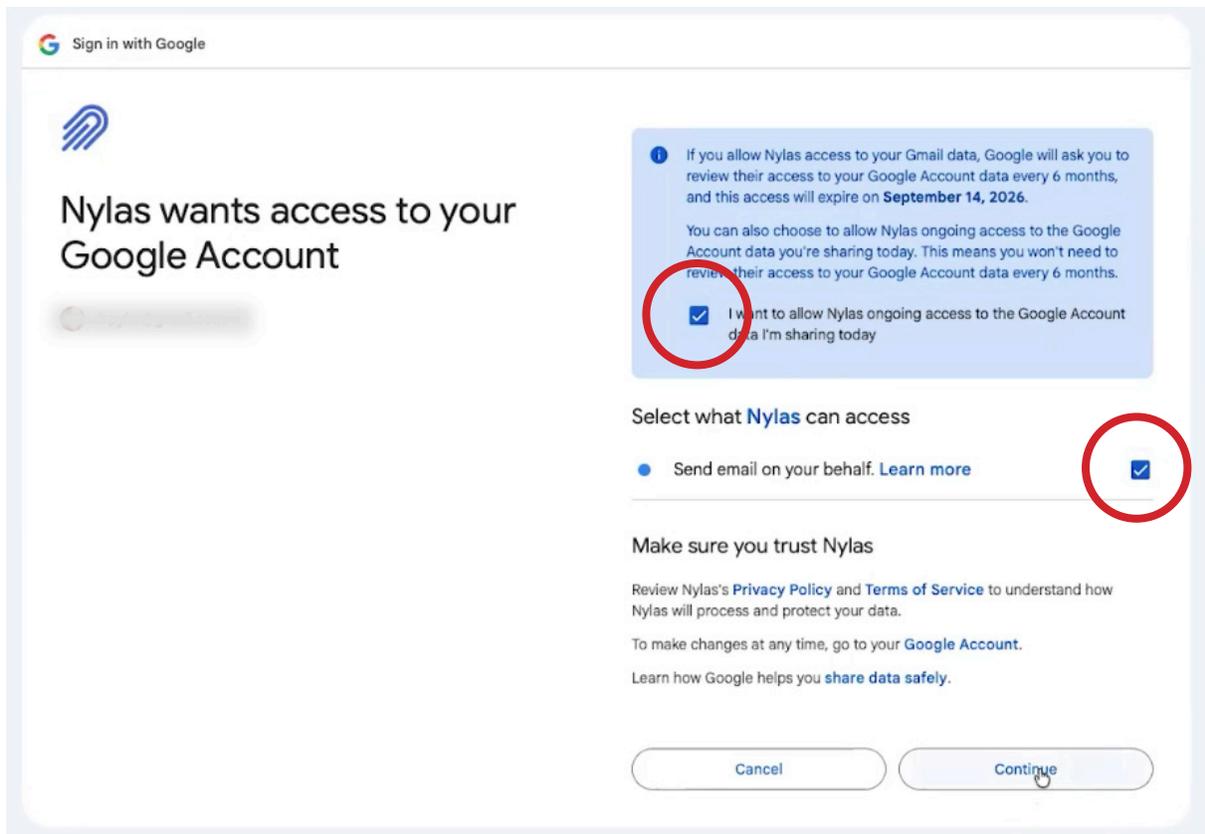
Find your service provider on the list below.

This is using Google as an example

Sign into Nylas. Nylas is the provider that allows us to use your mailbox to send the emails from Click-to-build.

Click "Continue"

Next, make sure you click both boxes to give Nylas permission.

Click "Continue"

Next you should see this:

**Connecting your inbox...**

Please wait. Do not close this tab.

Followed by this:

Inbox connected ✅
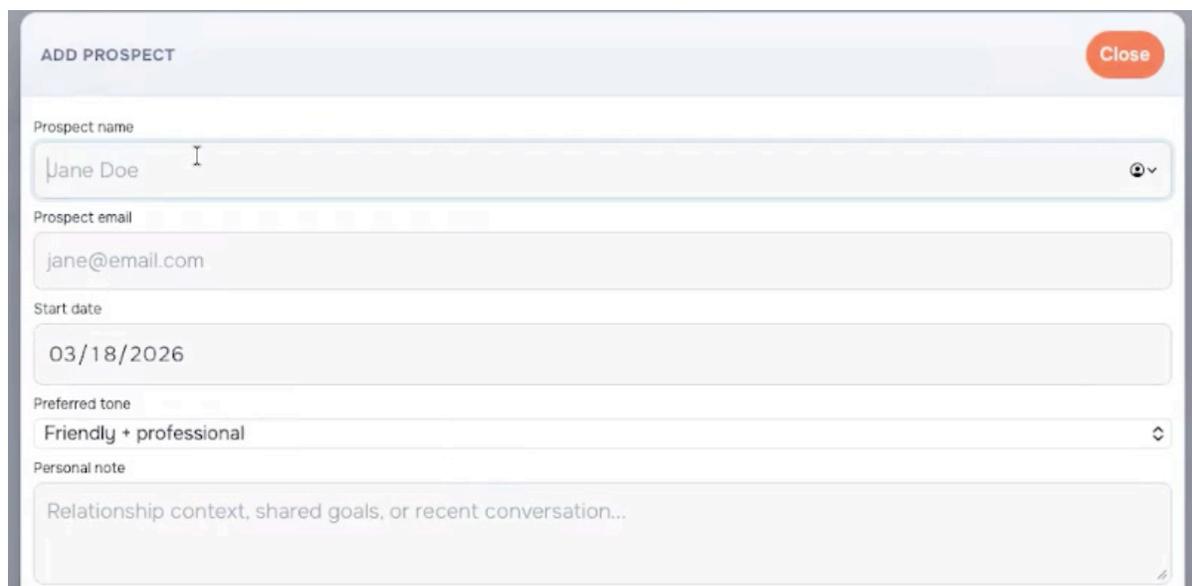
All set. You can close this tab.

Now let's add a lead!

Add the people you want to contact, choose the products for each lead, then review the email timeline generated for each one. This is where you control who enters the sequence and edit the outreach before it goes out. Click on "+ Add Lead"
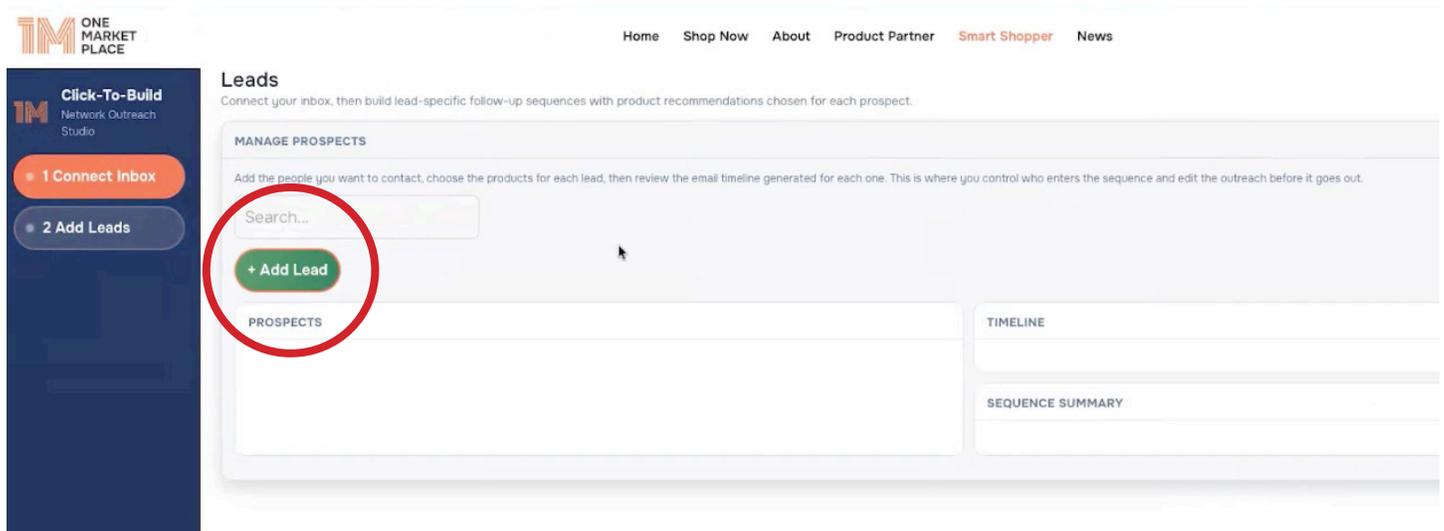
Fill Out the Form

Fill out the form below. Add the Prospect Name, Prospect Email, Campaign Start Date, Preferred tone (Friendly + Professional, Casual, Warm + Supportive or Direct). Next you'll add a personal note. The AI takes this into account when it writes the email.

Add products

Choose the product(s) you want to highlight during the campaign. For each email, the AI will only use one product that you have chosen. You probably don't want to pick more than 3. Clicking the "Favorite" button adds that product to the top of the list. You can also click on the "?" to learn more about the product.
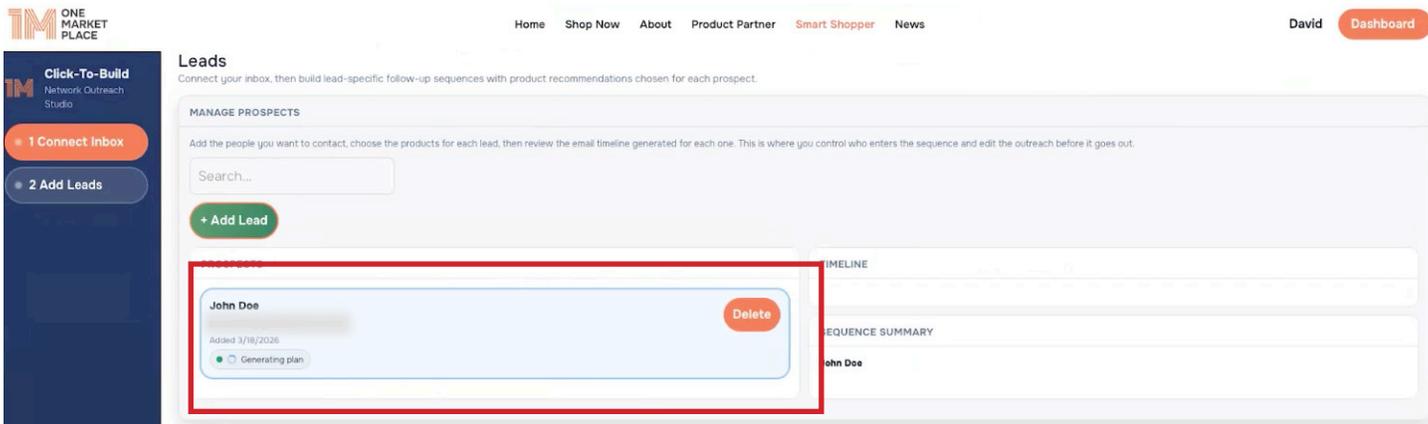

Complete the Form

Now all you need to do is click on "Add Prospect" to complete the form.

Processing

At this point, the system is processing the information and setting up the 90 Day Campaign emails. It should take no longer than a minute.

Timeline is now available

The timeline has been completed. You can see the information on the right.
Each day is listed with the date and time in which the campaign will take action.
You will also see details below. You can click on any of the emails to review.
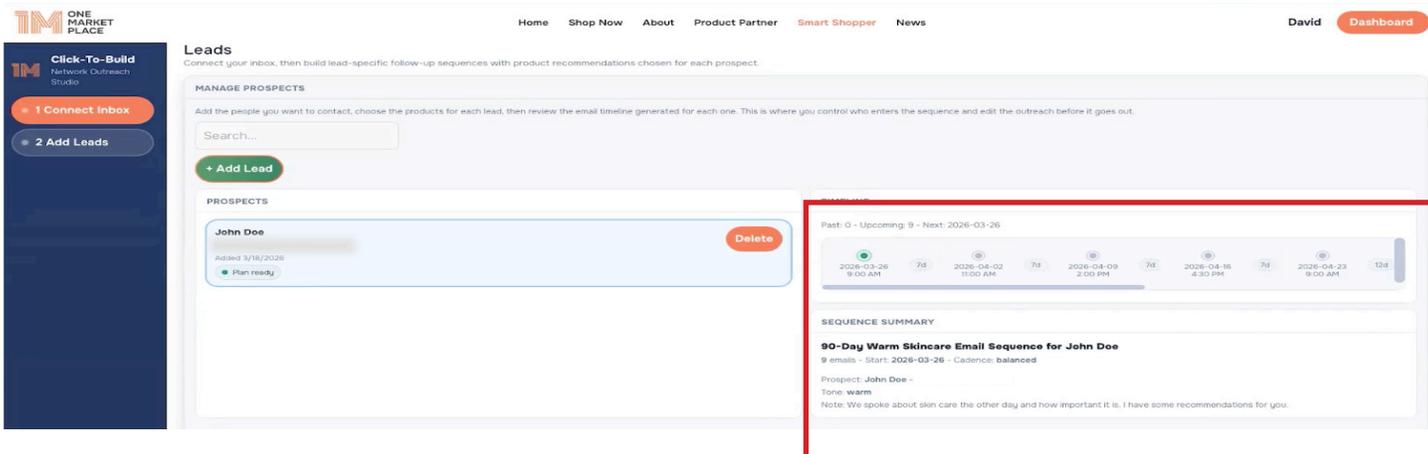
Review the Emails
Click on the emails for review. You can make any changes you wish. Once you've made the changes, you have two choices:

1. Save the email and it will go out on the date as scheduled.

2. You can send the email immediately. If you send the email it will be taken out of the timeline and will be sent to the prospect. Additional emails will go out as scheduled.

Close the window and add another lead!
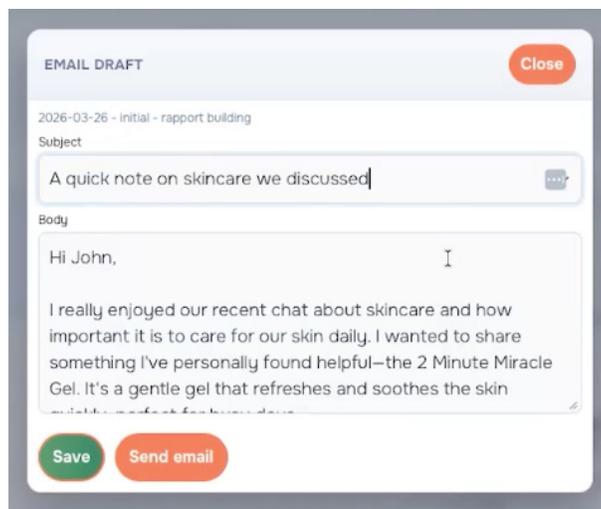
If you need further assistance contact: Support@onemarketplace.com