

## Seacret System FAQs & Tips

### Q. How do I log in if I already have a Seacret account?

- A.** If you have a Seacret account you can log in at <https://seacretapp.mysecureoffice.com>. This will take you to your Seacret Dashboard on the Desktop. For the application you can download the Seacret app from your app store on your mobile phone. We recommended having your phone operating system up to date before downloading the application to your phone. Once the application is downloaded, log in using your Seacret username and password.

If you can't log in to the Seacret application with your Seacret corporate credentials and you believe you should have access, please contact Seacret customer service by calling 877.680.9622. or email [support@seacretdirect.com](mailto:support@seacretdirect.com).

### Q. Can I import contacts?

- A.** Yes! There are a couple of ways you can import your contacts to the desktop version. The most basic way to import contacts is through an Excel or CSV file. Information on how to do this is shown below, or you can access instructions by going to your Seacret desktop version, hovering your mouse over the Contacts tab and selecting Import Contacts from the drop down menu.

#### IMPORT CONTACTS – UPLOAD YOUR CSV FILE

The email or SMS phone number and first name fields are required. All other fields are optional and do not necessarily need to be included in your file. The SMS phone field, if included, must start with the country code. If you already have a contact with a matching email, then that row in the .CSV file will be used to update the data of the old contact. If no matching email is found, then a new contact will be created.

#### Log into your builder/dashboard

Hover your mouse over the Contacts tab and select Import Contacts from the drop down list

Scroll down the page to the section labeled Upload Your CSV File

Click on the tab Choose File

Select the file from your computer

**Note:** We recommend editing your CSV file before uploading it into your contacts list within your builder. This ensures that contacts without a first name or email address can be removed and appropriately titles the columns before importing the contacts.

#### Allowed field names:

"last_name"	"zip"
"address2"	"phone2"
"first_name"	"country"
"city"	"sms_phone"
"email"	"notes"
"state"	"address"
"phone"	"folders"

## IMPORT CONTACTS – CUT AND PASTE EXCEL

### CONTACTS

- Log into your builder/dashboard
- Hover your mouse over the Contacts tab and select Import Contacts from the drop down list
- Scroll down the page to the section labeled Cut and Paste Excel Contacts
- The email or SMS phone number and first name fields are required. All other fields are optional and do not necessarily need to be included in your file.
- Open the Excel file you want to copy the contacts from
- Highlight the contacts you would like to add to your system, including any detailed info (address, phone, email, etc.).
- Select Edit from the menu in the Excel file and then Copy
- Go back to the Import Contacts page
- To the right of Cut and Paste Excel Contacts, right click in the box and select Paste

**Note:** We recommend editing your Excel file before copying and pasting the content. Allowed field names:

"last_name"	"zip"
"address2"	"phone2"
"first_name"	"country"
"city"	"sms_phone"
"email"	"notes"
"state"	"address"
"phone"	"folders"

### Q. Can I make my own auto-responders, drip emails, and email scripts?

- A.** As a Pro member, yes! You can create both drip emails and auto-responders by going to the Seacret desktop and clicking on the Prospecting, selecting Coaching Emails & Drips in the menu, then clicking the "Add Campaign" button to make your own emails. For email scripts, go to Prospecting – Email Scripts and click "Add Email Scripts" on the desktop.

### Q. How do I log into the Seacret app?

- A.** Please use your Seacret corporate account credentials that you would use to log into your Seacret account. For assistance, please contact Seacret customer service: 877.680.9622.

### Q. Will contacts that I sync in the app from my phone show up in my desktop Contact Manager?

- A.** Any contacts that you add to your desktop Contact Manager will be added when you sync contacts in the Seacret app. Any contacts from your device that are not on the desktop Contact Manager will only be added to the desktop Contact Manager once you have shared something with that specific contact.

### Q. Do the contacts I add to my Seacret desktop Contact Manager get added to the Contact section of the app?

- A.** Yes! All contacts that are in the desktop Contact Manager will be added to the Contacts section of the app when you sync. If you have added any contacts to the Contact Manager of the desktop since your last contact sync, you will need to do a pull-to-refresh on the Contacts section of the app to see those updates.

## Q. How do I change my username or password?

- A. Passwords can be changed via your Seacret back office. Username changes will need to go through Seacret Corporate. They can be reached by calling 877.680.9622 or emailing support@seacretdirect.com.

## Q. Can I edit a Coaching Campaign Drip? How?

- A. This Pro feature can be done by going to the Prospecting tab on the desktop – Coaching Emails & Drips. Once there, you can copy an existing campaign by selecting the Copy icon on the right. This will allow you to make edits to a copied version of the drip, allowing you access to both the original drip and your custom drip. Any changes will also be added into the app for easy sharing!

## Q. How do I set up my notifications?

- A. Desktop:
  - Go to your builder
  - Hover your mouse over the My Profile tab and select My Profile from the drop down menu.
  - Click on the tab labeled Notifications found on the left. On this page you will be able to enter up to five email addresses and one cellphone number that you would like to receive notifications for.
  - Once you have entered your email/cell phone information you will want to select the notifications that you would like to receive. When the circles are grey, this will mean they have been selected for you to receive notifications.
  - Click “Save Notifications”

### Seacret App:

Log into your application. This will allow you to receive an email notification letting you know your contact has viewed the PDF, video or article you shared with them through the SMS or email share methods.

1. First click on the settings option found in the menu bar at the bottom of the app screen.
2. Select the notifications option.
3. Select the Email Notifications option, turn it on, and then enter up to 5 emails in the spaces found below. Then select the slider to turn the notifications on and then click check mark or Done button to save.
4. You can then follow the same steps to add one mobile phone number to receive SMS notifications as well.
5. On the notifications screen select the ‘Test Notifications’ option to ensure that you will receive the notifications after your prospects view the content you sent them.

Hint: When entering in the email addresses, do not use auto complete, as this will add a space after the completed email address, which will affect the notifications being sent to you. Some mobile providers will not allow you to receive text notifications since it is not coming from a standard mobile number. One way to work around this is to add the email associated with your mobile number. To find that email address, you can text a message to one of your personal email addresses. Once you’ve received that email, look at the email address in the ‘From’ section and that will be the email you will add under email notifications. You can then test the notifications to ensure you will receive the notifications.

## Q. What is a Lead Capture Page?

- A. A lead capture page is a page that will pop up asking a prospect to fill out information like Name, Number, Email, ect... before they can view the content you have shared with them. This can be managed and turned off and on in both the app and desktop. In the app, go to Setting – My Information – Lead Capture. For the desktop, click on the “My Profile” tab then go to “Lead Capture” in the options on the left menu of the screen.

**Q. How does the Email Server Settings work?**

- A.** In the email server settings, you now have the option to use our system instead of your own email address to send out information to your contacts. If a recipient responds to an email you have sent using our system, the response will go to whatever email address you have set up in the personal information section on the My Profile page. If you select the advanced settings and want to set up your own email address, it is likely that your email provider will not allow the communication from our system to your email without further security settings inside your own email account. If this is the case, we recommend using our system in place of your own email address. If you would like to proceed with using your own email address, then you will need to get in contact with your email provider so they can assist you with the set up.

**We appreciate you as a Seacret member, and appreciate any feedback! Please send any feedback for Seacret app or dashboard to: [support@seacretdirect.com](mailto:support@seacretdirect.com)**