L'BRI Connect
DESKTOP
GUIDE

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The desktop version of the app does not exactly mirror L'BRI Connect mobile app. The mobile app is primarily media-based to make it easy to share content with prospects from your phone. The desktop version provides a way to easily share content with groups of contacts.

GENERAL INFORMATION

How to access the desktop version of the app:

▷ https://lbriapp.mysecureoffice.com
▷ Use your Business Center login and password to access the desktop app.

Support provided for the desktop version of the app:

L'BRI Customer Care

Hours of Operation: Mon–Fri, 8:30am–4:30pm Central Time

Phone: 262-363-9674 or 800-742-8828

Email: support@lbri.com

MEDIA TAB

When media is shared through Desktop, based on your preferences, notifications will be emailed and/or texted and also sent to Feed in Mobile app.

How to share media:

The media that is in the Mobile app is also in the Desktop so you can share Videos, Images, PDFs and Presentations. Click the category that represents the type of media you want to share.

1. Click *Media* under the *Media* tab.
2. Check the item you want to share. Use *Search* to easily find the resource or *Filter* to view media by *Tags/Folders*.
3. Click the *share icon* (image of 3 connected dots).
4. Choose the sharing option you want to use.

How to create media folders and add media to them:

Create new media folders when you want to arrange the content into different categories.

1. Click *Media* under the *Media* tab.
2. Under *Filter*, click the drop-down menu.
3. Click the *plus(+) icon*.
4. Create folder name in *Enter New Tag/Folder*.
5. Click *Save*.
6. Select the resource(s) you want to add to the folder by checking the box by each resource.
7. Click on drop-down menu next to *Select Action*.
8. Select *Add to Folders*.
9. Check the desired folder.
10. Click *Add to Folders*.

How to create a Presentation Builder:

Presentations group content together. Videos play in sequence.

1. Click *Presentation Builder* under the *Media* tab.
2. You can select multiple Videos, but only one PDF. The PDF will always appear last.
3. Enter a *Name* for the Presentation.
4. Click *Save Presentation*.
5. What you can do next…
   ▷ *Send Presentation* to as many contacts as you would like.
   ▷ *View Presentation* to view and edit all presentations that have been made.

How to create a Drips Email:

Drips are sets of email messages that are sent according to a predefined schedule/timeline. You can include as many emails in your drip campaign that you want. Drips and Auto-Responders are interchangeable terms that mean the same thing.

1. Click *Drips* under the *Media* tab.
2. Click *Add Drip.*

STEP ONE: INFO

1. Add a *Title* for the drip. This is not seen by recipient.
2. Ignore language and market drop-down menus.
3. You can add a Tag to organize.

STEP TWO: DRIP ITEMS

1. Click *+Add Item* button.
2. Enter a *Subject*.
3. You can customize the email body just as you would when creating an Email Script.
4. Leave the *Day* as 1. This will send the first email in the drip the day after it is sent to a contact.
5. You can *Add Custom Data* where you place the cursor and *Add Media* from the app to the email.
6. Once completed, click *+Add* button at the top right. You'll be brought back to the original Drip email screen.
7. To add an additional email in the series, click on the *+Add Item* button. You'll be prompted to go through the same process as outlined above by adding a *Subject* line, email text, and resources.
8. At the *Day* item, select from the drop-down menu the number of days you'll want to pass before this next email is automatically sent to the recipient.
9. Click *+Add* under the **STEP TWO - DRIP ITEMS** area of the screen. You will now see that you've successfully added two emails to the drip campaign.
10. You can add as many additional emails as you like by clicking *+Add Item* and following the same process as outlined above.
11. You can send a test email to someone to confirm the email is displaying the info properly by clicking on *Send Test*.
12. If you are satisfied with the drip emails, click *Save*.

How to send already-created Drip Emails to individual contacts:

1. Go to *Manage Contacts* under *Contacts*.

2. Click on the name of the contact(s) to whom you want to send the drip campaign.

3. Under *Auto-Responders/Drips*, click on the *Campaign* drop-down menu and select the appropriate drip campaign.

4. Confirm the date you want to start the drip campaign and click *Save*.

How to send already-created Drip Emails to multiple contacts:

The way drip emails are sent to multiple contacts is by grouping contacts into folders FIRST and then sending the drip campaign to everyone in the folder.

1. Go to *Manage Contacts* under *Contacts* tab.

2. Click on the name of that folder located under *View All* on the left.

3. Click on the drop-down menu under *Actions* and click *Add to Auto-Responders/Drips.*

4. Select the name of the appropriate drip campaign from the drop-down under Campaign, write in (or select) a date on which you want to initiate the campaign, and click on *Add to Auto-Responder/Drip*.

   TIP: You can copy and then edit company-created drip campaigns to personalize them.

How to create a 1-Click Email:

This is the place from which you SEND emails you have already created.

▷ Click *1-Click Email* under the *Media* tab.

STEP ONE: SELECT CONTACTS

1. To select individual contact(s), check name(s) in list.

2. To select folder(s), click on *Add by Tag/Folder* drop-down menu and check folder.

STEP TWO: WRITE A MESSAGE

1. Select a created Email Script by clicking the drop-down menu or create one.

2. Write a short, clear, compelling *Email Subject*. (See 8 examples under How to Create Email Scripts.)

3. You can add an attachment by clicking on *Choose File*.

4. You can add resources by clicking *Add Custom Data* or *Add Media* that is in the app.

5. Write your message in *Email Body*.

6. You can *Preview Message* and then go back to Email Body by clicking *Plain Text Editor* to make edits.

▷ Check *I Agree to the Anti-Spam Policy* box.

▷ *Send Email* or *Save as Script*.

How to create Email Scripts:

Email Scripts are CREATED here and SENT from 1-Click. Email Scripts are email templates that can be sent as many times as you'd like to individual contacts or groups in folders. Once scripts are created, they can be personalized. They can be grouped by subject and saved into those category folders.

1. Click *Email Scripts* under *Media* tab.

2. Click *Add Email Script.*

3. Name the *Title* of the script which is not seen by recipient.

4. Ignore language and market.

5. Create a short, clear, compelling *Email Subject* line. *See 8 examples below.*

  ▷ Avoid spam trigger words and phrases: free, sale, offer, homebased, solution, make money, opportunity, work from home.

6. Write the *Email Body* of the Email Script.

  ▷ You can customize the format: font, size, color, bold, underline, bullets, etc.

  ▷ You can add a URL link by clicking the globe/link icon.

  ▷ You can *Add Custom Data*: contact's first name, your name, etc. Check the data you want and click *Add Selected*. (Note: "Referred by" does not apply to L'BRI.)

  ▷ You can *Add Media*: images, PDFs, videos, etc. that are in the app.

7. You can *Preview Message* and then go back to Email Body to make edits.

8. Click *Save Script. Email Scripts are SENT from 1-Click.*

9. Once back on the main Email Scripts page, you can create additional scripts by clicking *Add Email Script*.

10. You can also add completed Email Scripts to Folders listed on the left side of the Email Scripts page. Click on the *Action* drop-down menu. Click on *Add to Folders*, check the folder you want then click on *Add to Folders*.

11. Click on the *Actions* drop-down menu to *Delete from Folders* or *Delete*.

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8 Email Subject Line Examples to Boost Open Rates

CUSTOMER

- Uh-oh! You're about to run out of _____
- Must-have products to stay safe in the sun
- Get this before it's gone
- New video: How to contour
- Quick, easy morning skincare routine
- Everything you wanted to know about (topic)
- Is this better than retinol?
- Here's why you need a serum

TEAM

- Meet the team: how it started & how it's going
- Showing you the money
- 5 ideas to book parties right now
- Tonight at (time): Learn how to earn more
- Top achievers tell all
- What successful Consultants do (that you can too)
- How to find new customers this week
- 5-minute action plan

CONTACTS TAB

When contacts are added to the Desktop, they will appear in the Mobile app as well when the Contacts page is refreshed by pulling down. Contacts added to the Mobile app will appear in the Desktop if action is taken. For example: You identified them as hot or cold, or sent them a video or image.

How to add a single contact:

1. Click *Add Contact* under the *Contacts* tab.

2. Fill in contact's information.

3. Click *Save* or *Save & Add Contact* to add more contacts.

How to import contacts via Excel file:

1. Click *Import Contacts* under the *Contacts* tab.

2. Go to section *Cut and Paste Excel Contacts*.

3. Click on the link *Download an example .csv file*. This will download/pull up an Excel file displaying the proper formatting to be used when uploading contact info into the system using Excel.

4. In the Excel file, columns will display different items: last_name, first_name, email, etc. Remove the example contact info provided in the downloaded file and fill out this info as appropriate to the contacts you are wanting to upload. Make sure to keep the column headers in the file. You do not need to fill out all the columns - just the ones for which you'll want data uploaded into the desktop tool. However, last name, first name and email are REQUIRED.

5. After you fill all of the correct info for your contacts, highlight and COPY all of the cells in Excel that contain the info you want to upload - ensuring to also highlight and copy the column names (last name, first name, email, etc.)

6. PASTE the copied info in the *Paste Data Here* box in the desktop tool under the Excel section.

7. Click *Submit*.

8. The system will then give you a preview of the data it is planning to import. If everything looks good, then click *Import*.

How to import contacts via CSV file:

This is similar to importing via Excel.

1. Click *Import Contacts* under the *Contacts* tab.

2. Identify the row called *Upload Your CSV File*. *(CSV = comma-separated value.)*

3. Click on the link *Download an example .csv file*. This will download/pull up an Excel file displaying the proper formatting to be used when uploading contact info into the system using Excel.

4. In the Excel file, columns will display different items: last_name, first_name, email, etc. Remove the example contact info provided in the downloaded file and fill out this info as appropriate to the contacts you are wanting to upload. Make sure to keep the column headers in the file. You do not need to fill out all the columns - just the ones for which you'll want data uploaded into the desktop tool. However, last name, first name and email are REQUIRED.

5. After you fill all of the correct info for your contacts, click *Save-As* in Excel. Make sure to save the file as a CSV file (vs Excel or Word, etc.).

6. Go back to the desktop tool and click *Choose File* button.

7. You'll then be prompted to choose the appropriate file from your computer.

8. Click *Submit*.

9. The system will then give you a preview of the data it is planning to import. If everything looks good, then click *Import*.

TIP: It is helpful to complete the folders column in the Excel file so contacts are added to the desired folder.

How to create a contact folder:

1. Click *Manage Contacts* under the *Contacts* tab.
2. Click *Create New Folder* on the left-hand side.
3. Name the new folder and click *Save.*

How to add a contact(s) to a folder:

1. Click *Manage Contacts* under the *Contacts* tab.
2. Put a check next to the contacts you want to add to a folder.
3. Click on the *Actions.*
4. Select *Add to Folders* from the drop-down menu.
5. Select the folder in the menu.
6. Click on *Add to Folders*.

How to edit a contact:

1. Click *Manage Contacts* under the *Contacts* tab.
2. Click on the contact's name.
3. Click *View* on the right*.*
4. Click *Edit Contact Information* on the top left.
5. Edit contact and click *Save*.

ANNOUNCEMENTS TAB ───────────────────────────

Announcements
▷ Find announcements from L'BRI.

How to create To Do's for follow up:

1. Click *To Do Tool* under the *Announcements* tab.
2. Click *Add Task* at the bottom.
3. Fill in *Contact*, *Description*, and *Due Date.*
4. You can flag the task by clicking *Priority* and click the headings to sort items, edit them and click when completed.
5. Click *Save*.

MY PROFILE ───────────────────────────

My Profile > My Info
How to change your personal information and website display:

1. Click *My Profile* icon. (To access *My Profile*, click the circle icon in upper right with your initials or photo.)
2. Click on *My Info*.
3. Update information*.*
4. Click *Save*.

How to set account notifications:

Your site has the ability to notify you when someone views one of your custom presentations, signs up on your website, requests more information, and more. Notifications can be sent to you via email and/or text message.

1. Click *My Profile* icon (in upper right with your initials or photo).

2. Click *My Info*.

3. Go to *Notifications* on the left.

4. Select your Notifications preferences.

5. You can *Send Test to Email and Mobile*.

6. *Save Notifications*.

Set Lead Capture to Off:

Lead Capture requires unknown visitors to your site to enter their contact information prior to accessing your website. This is currently not considered a best practice, so it is OFF by default and suggested it remain off.

1. Click *My Profile* icon (in upper right with your initials or photo).

2. Click *My Info*.

3. Click *Lead Capture* on the left.

4. Be sure Lead Capture is turned *OFF*.

5. Click *Save*.

Email Server Settings

▷ We do NOT recommend changing server settings.

▷ You are currently using the L'BRI system servers to send out emails. These settings are available to help you avoid configuring your personal email server settings and are recommended. Verb cannot support other servers.

How to personalize your Auto-Responders/Drips:

Drip emails (also referred to as Auto-Responders) can be sent automatically from your site. Below you can get specific triggers that will assign your contacts to a drip email campaign based on your contact's actions.

1. Click *My Profile* icon (in upper right with your initials or photo).

2. Go to *Auto-Responders* on the left.

3. Update Auto-Responders preferences. To do this, you'll see drop-down menus for the *Does Not Watch Presentation* and *Watches Presentation* items. These items will say (none) if you've never created an email drip campaign. Your created campaigns will show up as options here. You can create specialized email drip campaigns for these items.

4. Click *Save*.

Other Settings

▷ **Join Now Button** – L'BRI has set up a *Join Now* link to go to your website when you share content. Here you can change the text of the button as well as the link it goes to when your prospects click.

▷ **Markets** – This defaults to United States because it is currently our only market.

▷ **Delete All Contacts** – We do NOT recommend deleting contacts. It is better to hide them. Once deleted, these contacts will no longer be available in the app system and their data will be permanently deleted. Deleting contacts in the app does not delete them in Customer Management.

Mobile App Access Code

▷ You may use the access code displayed instead of a password to log into the app.

My Profile > Training Content

To access My Profile, click the circle icon in upper right with your initials or photo.

▷ Training content is provided in video, audio and PDF formats.

▷ Training content cannot be shared.

My Profile > Settings

To access My Profile, click the circle icon in upper right with your initials or photo.

▷ Click to access Support.

My Profile > Market & Language

▷ This cannot be changed. L'BRI only markets in the United States and communications are only in English.

My Profile > Log Out

▷ Click here to log out.