CLIENTFORCE AI

USER GUIDE

Setup, Configuration & Campaign Playbook for New and Existing Users

Version 1.2

This guide will be expanded with additional content over time.

Table of Contents

1. Welcome & How to Use This Guide

2. What Clientforce Is (and isn’t)

3. The Clientforce System: The Big Picture

4. Quick-Start Checklist

5. Part One — Account Setup

6. Part Two — Connecting Your Communication Channels

7. Part Three — Workspaces (Managing Multiple Clients/Businesses)

8. Part Four — Building Your Knowledge Source (Business Information)

9. Part Five — Creating an AI Agent & Campaign

10. Part Six — Turning Clientforce Into a 24/7 Automated Sales Assistant

11. Part Seven — Getting Leads into the System

12. Part Eight — Managing Live Campaigns (Inbox, Sequences, Calls, Leads)

13. Part Nine — Credits & Billing Basics

14. Worked Example — Appointment-Setting Campaign

15. Frequently Asked Questions

16. What's Coming Next

17. Glossary of Key Terms

1. Welcome & How to Use This Guide

This guide walks you through setting up and using Clientforce from a blank account to a running, lead-generating AI sales campaign. It is written so that both brand-new users and existing users who want a refresher can follow it start to finish or jump straight to the section they need.

It is built from Clientforce's official Week 1 mentorship training ("Foundation"), the accompanying slide deck, and Clientforce's own reference documents. It is intended to grow — new sections will be added as later weeks of the mentorship series (channels deep-dive, campaigns, auto-prospecting, integrations, agency setup, and scaling) become available.

> **WHAT'S NEW IN THIS VERSION:** This version adds detailed, screen-by-screen walkthroughs pulled from Clientforce's own module training videos (dashboard orientation, phone number setup, the in-app Knowledge Source builder, Lead Finder, CSV import, the LinkedIn Chrome extension, 24/7 automation, and the full agent-and-campaign launch wizard), plus the official credit-cost breakdown and the credit purchase/allocation walkthroughs.

How the guide is organized

- Parts One through Nine follow the exact order Clientforce recommends you set things up in — don't skip ahead.
- Each part includes numbered step-by-step instructions plus notes on common mistakes.
- A worked example (appointment-setting) shows the whole system running end to end.
- An FAQ section answers the most common questions raised during live training sessions.

> **NOTE:** Clientforce is under active development. Screens, menu labels, and available integrations (e.g. Gmail sign-in, the built-in Clientforce Mailer) may change slightly as new features go live. Where a feature was described as "coming soon" at the time of writing, this guide notes that clearly.

2. What Clientforce Is (and isn’t)

Clientforce is not just software you learn feature-by-feature — it is a complete AI-driven revenue system. Its job is to take a prospect from "unknown lead" to "booked call, proposal, or sale" with minimal manual effort from you.

The real goal

Don't approach Clientforce by trying to memorize every button. Instead, aim for outcomes such as:

- Generating new leads for your business or a client's business
- Turning conversations into conversions

- Creating booked calls
- Opening new revenue opportunities

Two ways to use it

- As your own sales system — to grow your own business.
- As a client service engine — running it as a paid service for other businesses (an "agency" model), covered later in the mentorship series.

> **COMMON MISTAKE:** If you find yourself testing every feature at once instead of working toward one outcome, stop and re-read the Quick-Start Checklist in Section 4.

3. The Clientforce System: The Big Picture

Everything inside Clientforce connects into one single flow:

Lead → Campaign → AI Agent → Conversation → Booking / Proposal → Revenue

The four core parts

Part	What it does
1. Lead Input	Where prospects come from — manual upload, forms, the built-in Lead Finder, the website widget, the Chrome extension, or automatic scheduled prospecting.
2. Campaigns	The engine that drives everything — the messaging sequence and workflow an AI Agent runs against your leads.
3. AI Agents	The "brain." Each agent is trained on your business and makes decisions about what to say and when.
4. Channels	How you actually communicate — email, SMS, phone/voice calls, and WhatsApp.

Why the order matters

Without channels connected, there are no messages. Without messages, there are no conversations. Without conversations, there are no results. This is exactly why channel setup is the very first thing you should do — before creating an agent or a campaign.

4. Quick-Start Checklist

Complete these in order. Each one is covered in detail in the part of the guide referenced next to it.

- ☐ Set up your account basics — business name, workspace, profile, time zone (Part One)
- ☐ Connect at least one communication channel — email is the priority (Part Two)
- ☐ Set up any additional workspaces if you manage multiple clients/businesses (Part Three)
- ☐ Prepare your Knowledge Source document describing your business (Part Four)
- ☐ Define your first use case / goal — e.g. "get more booked calls" (Part Five)
- ☐ Create your first AI Agent and campaign (Part Five)
- ☐ Choose how leads will enter your campaign (Part Seven)
- ☐ Launch the campaign and monitor the Inbox for replies (Part Eight)

BEST PRACTICE: Start with one goal, one use case, and one campaign. Don't try to test every feature at once or run multiple campaigns blindly — this is the single biggest predictor of early success with Clientforce.

5. Part One — Account Setup

Do this first. Five small things now prevent bigger problems later.

Step 1: Set your business name

Use the name your customers already know — this appears in messages sent on your behalf.

Step 2: Set up your workspace

Structure your workspace before inviting any team members. A workspace is a container for one business or one client (see Part Three for multi-workspace use).

Step 3: Complete your basic profile

Add your logo, contact information, and any signature defaults you want included in outgoing messages.

Step 4: Set your time zone and region

This is critical — it controls your sending windows for messages and the times your AI Agent will offer for calls.

Step 5: Review initial preferences

Set notification preferences and general account behavior. These are optional but worth a quick look.

Two questions to answer before you configure anything

These two questions determine everything that follows, so answer them before you touch settings:

1. What are you using Clientforce for? Your own business, client services, or both.
2. What outcome do you want? Leads, follow-up, booked calls, or sales.

AVOID: Setting things up randomly, without a clear use case, and trying to do everything at once are the most common reasons new users get stuck. Decide your one goal first.

5.1 Getting started: your first login

The first time you log in, Clientforce drops you into your default workspace. Before doing anything else:

1. Confirm you're in the right workspace (top of the screen) this matters once you manage more than one.
2. Open Settings and work through the account basics above (business name, profile, timezone).
3. Note the setup notice/banner if one appears — it's Clientforce telling you which required step (usually a channel) hasn't been completed yet.

5.2 Understanding your dashboard

Think of your dashboard as the central command center for lead generation, outreach, automation, and sales. The top navigation bar breaks down as follows:

Menu item	What it's for
Workspace selector	Switch between your individual workspaces and the Account Admin Workspace. The Account Admin Workspace is where account-wide settings live — billing, workspace creation, bonuses, and credit allocation.
Home	Returns you to your dashboard from anywhere in the platform.
Agents	Create new agents, manage existing campaigns, and monitor performance.
Contacts	All your leads and contacts. Import contacts, create lists, organize prospects, and manage your lead database.
Analytics	A full view of campaign performance — outreach activity, engagement, conversions, funnel performance, and overall effectiveness.
Tools	Email templates, Lead Finder, LinkedIn prospecting extension, Dynamic Proposals, integrations, and other automation features.
Help	Training resources, video walkthroughs, feature documentation, support materials, and mentorship replays.
Profile menu	Communication Console (channel setup), credit usage, account settings, and logout.
Chat widget (bottom of screen)	Message Clientforce support directly.

Below the top bar, the dashboard itself shows quick-action shortcuts (connect a channel, create your first agent, launch a campaign), then key performance metrics at a glance — active agents, contacts in sequence, qualified leads, bookings generated, and revenue/payments closed — followed by your Active Agents list, where you can track messages sent, opens, replies, qualified leads, and bookings for each running campaign.

> **NOTE:** If a number on the dashboard looks off (e.g. a campaign shows zero sends), check your channel connection in the Communication Console first (Part Two) it's almost always a disconnected or misconfigured channel, not a bug.

6. Part Two — Connecting Your Communication Channels

Channels are how your AI Agent actually reaches people. Clientforce currently supports four channels: Email, SMS, Calls/AI Voice, and WhatsApp. Email is the primary channel and the one Clientforce recommends you connect first.

Where to find channel settings

1. Click your profile menu (top right of the dashboard).
2. Select Communication Console.
3. From the left sidebar, you'll see the setup areas for each channel — Email Settings, and (depending on your account) Phone Numbers and WhatsApp.

> **NOTE:** Some accounts also surface a Settings → Communication Channels view with the same information. If you don't see Communication Console under your profile menu, check Settings instead — the underlying setup is the same.

6.1 Connecting an email sender

Email is the workhorse channel and should be the first one you connect.

Step 1: Open Email Settings

Profile menu → Communication Console → Email Settings.

Step 2: Click Add Account

This opens the email connection form.

Step 3: Choose a connection method

There are several ways to connect an email sender:

- SMTP/IMAP — connect using your hosting account's details, or a third-party SMTP service such as Mailgun or SendGrid.

- Outlook / Microsoft Exchange
- Gmail or Google Workspace — pending final platform approval at the time of writing; check availability in your account.
- Clientforce Mailer — an internal, fully managed email service Clientforce is building; check your account to see if it has gone live.

Step 4: Enter your email address and sender name

The sender name is what recipients see as the "From" name on outgoing messages.

SMTP / IMAP connection fields

Fill in the fields exactly as shown below. Leave Username and Password blank until you have your own mailbox credentials in hand — do not reuse anyone else's login.

Field	What to enter	Tooltip shown in Clientforce
IMAP Host	*e.g. mail.yourdomain.com*	*Your email hosting provider's IMAP server address*
IMAP Port	*e.g. 993*	*Standard secure IMAP port (confirm with your host)*
SMTP Host	*e.g. mail.yourdomain.com*	*Your email hosting provider's SMTP server address*
SMTP Port	*e.g. 465 (SSL) or 587 (TLS)*	*Standard secure SMTP ports (confirm with your host)*
Username	*— leave blank —*	*your email username*
Password	*— leave blank —*	*your email password*

Step 5: Get your SMTP/IMAP details

You can get these two ways: (a) ask your hosting provider directly, or (b) if you use a common host such as HostGator or Bluehost, the mail server is typically mail.yourdomain.com (for example, if your domain is johnagency.com, your mail host would be mail.johnagency.com). Third-party services like Mailgun or SendGrid provide these details directly in their dashboard — each service has its own username/password convention (SendGrid, for example, uses the literal word "apikey" as the username and your API key as the password).

Step 6: If you're using Gmail, generate an app password

Your regular Gmail password will not work for SMTP authentication — you'll need to generate a one-time app password from your Google account settings and use that instead.

Step 7: Confirm your port and SSL setting

If you're connecting using SSL, make sure your SMTP port is set to 465.

Step 8: Click Test Connection

This verifies that both your SMTP and IMAP settings are correct before you save anything.

Step 9: Set the DKIM selector

If you're unsure what to enter here, use "default," then proceed with verification.

Step 10: Configure remaining settings

Safety settings, your email signature, and your unsubscribe/opt-out message.

Step 11: Click Save

Your email account is now added to the workspace.

Step 12: Set it as your default sender

This ensures your AI Agents automatically use this account whenever they send email campaigns.

NOTE: You can connect more than one email sender (for example, one SMTP account and one Gmail account). Each sender has its own sending limits, and a campaign can be configured to use multiple senders.

DELIVERABILITY TIP: For deliverability, avoid sending high volumes from a brand-new inbox right away. Clientforce is rolling out inbox warm-up tools to reduce the risk of your email being flagged as spam.

6.2 Connecting a phone number (for SMS and calls)

This is your sending number — the one your AI Agent texts and calls from. Set it up once per workspace, from the same Communication Console used for email.

Step 1: Open Phone Numbers

Profile menu → Communication Console → Phone Numbers (or Settings → Communication Channels → Phone Numbers, depending on your account).

Step 2: Click Add Phone Number (or Buy a Number)

This opens the number-search panel.

Step 3: Choose a country

Select the country your sending number should be based in — this should generally match the country you're prospecting in, since local numbers get better answer rates.

Step 4: Choose an area code and search

Enter a preferred area code (or leave it broad) and click Search. Clientforce returns a list of available numbers for that area code, each shown with its monthly cost.

Step 5: Select a number and confirm the purchase

Click a number from the results, confirm, and it's provisioned immediately. It's now assigned to this workspace and ready to use.

Step 6: Set it as your default sending number

If your workspace has more than one number, confirm which one is the default for new campaigns.

Step 7: Test it

Send yourself a test SMS or place a test call once the number is active, to confirm delivery before it's used against real leads.

> **NOTE:** A phone number is tied to the workspace it was purchased in. If you manage multiple clients in separate workspaces (Part Three), each workspace needs — and pays for — its own number.
>
> **NOTE:** Phone numbers are provisioned through Twilio, which has strong carrier support across most of the US, though not every carrier is guaranteed. If purchasing a number in certain countries fails, contact support — this has occurred with some international numbers.

6.3 Connecting WhatsApp

WhatsApp setup is more involved than email or SMS. Detailed, step-by-step WhatsApp connection instructions are covered in the Week 2 ("Channels") session of the mentorship series; check for updates to this guide or contact support if you need to connect WhatsApp before that content is added here.

Confirming your setup

Once at least one channel is connected, your workspace will show which channels are active (e.g. "Email connected," "Phone connected," "WhatsApp connected"). If nothing is connected yet, Clientforce will prompt you to connect a channel before you can launch a campaign.

> **IMPORTANT:** If you create an agent/campaign without a connected phone number, any SMS or call steps in that campaign will not be able to run. You can add the channel later — the campaign will start working as soon as it's connected.

7. Part Three — Workspaces (Managing Multiple Clients or Businesses)

Every Clientforce account starts with one default workspace. If you manage more than one client or business and want to keep them fully separate, you can create additional workspaces.

Step 1: Create a new workspace

From your account menu, choose to create a new workspace and give it a name (e.g. the client's business name).

Step 2: Add credits to the new workspace

Go to Settings → Plans and Billing inside that workspace. New workspaces start with zero credits — you must allocate credit from your total account balance before campaigns in that workspace can run.

Step 3: Repeat for each client/business

Each workspace can represent a different client or a different business line. There is no charge simply for creating a workspace — you only need to allocate credit to it.

> **NOTE:** Set up channels, Knowledge Source documents, and campaigns separately inside each workspace — they do not share settings with each other.

8. Part Four — Building Your Knowledge Source (Business Information)

Your AI Agent can only sell as well as it understands your business. The Knowledge Source is the document you give the agent so it knows what you do, why someone should buy, how to handle objections, and how to represent your business correctly.

Every other part of setting up a campaign is largely you answering the agent's guided questions — this is the one part where the quality of what you provide is entirely up to you, and it has an outsized effect on results.

How to build it

1. Start from Clientforce's Knowledge Source Template (provided separately, or duplicate the sample the platform links to).
2. Fill in each section as completely as you can. The more detail you provide, the better your agent will perform.
3. Save/export the document, then upload it when creating your agent (see Part Five).

Two ways to give Clientforce your business information

There are two supported paths — use whichever fits how you like to work, or use both:

- Upload a document — write your Knowledge Source in the template (Word, Google Doc exported as PDF/DOCX, or plain text) and upload the file directly when creating your agent.
- Build it inside Clientforce — walk through the in-app Knowledge Source builder, which prompts you section by section (business overview, offer, audience, objections, etc.) and saves your answers directly to the workspace, so you don't need a separate file at all.

> **NOTE:** Whichever path you use, the underlying sections are the same as the template below. If you update your business details later, edit the Knowledge Source directly in Clientforce (or re-upload a revised document) — existing campaigns pick up the change the next time the agent references it.

Walkthrough: building it in-app

Step 1: Open the Knowledge Source area

From your workspace, go to the Knowledge Source / Business Information section (also reachable from the agent-creation flow in Part Five).

Step 2: Work through each prompt in order

Answer one section at a time — business overview, customer profile, pain points, offer, USP, objection handling, and so on, matching the template sections in the table below.

Step 3: Be specific, not promotional

Write it the way you'd brief a new salesperson on their first day, not the way you'd write ad copy. The agent uses this to reason about what to say, not just what to display.

Step 4: Save

Your answers are stored against the workspace and become available to any agent/campaign you create in it.

Step 5: Revisit it as your offer evolves

Update pricing, objections, or positioning here whenever they change in real life — this document stays live, it isn't a one-time upload.

Recommended sections (from the official template)

Section	What to include
1. Business Overview	What your business does, your model, and who you serve.
2. Customer Profile	Primary audience and psychographics/financial profile.
3. Pain Points	The specific problems your product/service solves.
4. Products / Services / Offer	A full breakdown of what you sell.
5. Unique Selling Proposition	What makes you different from alternatives.
6. Objection Handling Database	Common objections and your recommended responses.
7. Competitor Intelligence	Who you compete with and your advantages.
8. Case Studies / Social Proof	Testimonials and results you can point to.
9. Sales Process	The steps a lead moves through from first contact to close.
10. Brand Voice	Tone and style guidelines for how the agent should sound.

Section	What to include
11. FAQs	Answers to the questions prospects ask most.
12. Compliance & Restrictions	Anything the agent must never say or claim.
13. Bonuses	Any extras included with your offer.
14. Product Intelligence & Support Brain	Deeper detail to support customer questions after the sale.

WHY THIS MATTERS: Be as thorough as possible in Section 6 (Objection Handling) and Section 12 (Compliance). A generic or thin document produces a generic agent — vague instructions lead to the agent drifting off-message or, at worst, making claims you didn't intend.

9. Part Five — Creating an AI Agent & Campaign

Do this only after your channels are connected (Part Two) and your Knowledge Source document is ready (Part Four). Creating the agent is what actually builds and launches your campaign.

Stage 1 — Agent setup

Step 1: Go to Agents

From the top menu, select Agents, then click Create Agent.

Step 2: Name your agent

Give it a descriptive name, and upload an avatar or use the default.

Step 3: Name your campaign

This can be different from the agent's name — e.g. agent "Ava," campaign "Q3 Booking Outreach."

Step 4: Choose an agent tone

This sets the communication style and personality — for example, professional, friendly, confident, consultative, or conversational.

Step 5: Choose an agent role

This defines what the agent is responsible for: lead generation, appointment booking, follow-ups, customer support, or sales conversations. In simple terms, this tells the AI what its job is.

Step 6: Choose a voice persona

This is the voice your agent uses on phone calls — pick one that matches the tone and personality you want on calls, then click Next.

Stage 2 — Knowledge Source

This is where you feed the agent everything it needs to talk about your business correctly (see Part Four for how to prepare this in depth).

Step 7: Enter your business description and industry

Step 8: Upload your brand logo

Optional.

Step 9: Click Add File or Link

Upload your prepared Knowledge Source document here.

Step 10: Add your website URL

The agent studies your site directly and uses it as additional context when talking to leads, then click Next.

Stage 3 — Choose how to build the campaign

You have three starting points:

- Build with AI — the AI asks you a few questions and generates the full campaign automatically.
- Build from scratch — you build every step manually.
- Use a ready-made Playbook — a pre-researched, pre-structured sequence built for a specific niche or campaign goal.

Whichever you choose, here's what happens next:

Step 11 · Build with AI: Answer the AI's questions

The AI asks you a few questions and, combined with your Knowledge Source, generates a complete multi-channel sequence in seconds — typically starting with email, then SMS, WhatsApp, and phone calls at the right moments.

Step 11 · Playbook: Pick and customize a playbook

Browse the playbook library, click one to preview its category, type, and sequence, then click Edit Before Using. Enter your value proposition and call-to-action link (what you want the lead to do — book a call, sign up, request a quote, visit a site), then click Create Campaign.

Step 11 · From scratch: Build manually

Add each channel step manually in the sequence editor described below.

Stage 4 — Design and edit your sequence

Step 12: Review the generated (or blank) sequence

Each step represents one touch — an email, an SMS, a WhatsApp message, or a call.

Step 13: Add or remove steps

Click the plus button to add a new step or a new sequence branch under an existing one.

Step 14: Edit a step

Click its edit icon to open the Sequence Editor. From there you can apply templates, click Insert Variable to personalize (first name, company name, etc.), highlight text and click the link icon to embed a URL, and format text (bold/italics).

Step 15: Check the quality score

The editor shows a quality score for your message — use it as a guide to how effective the structure is likely to be.

Step 16: Insert a proposal (optional)

If a step is proposal-based, click Insert Proposal and choose a saved proposal from your personal library.

Step 17: Set the timing for each step

Define the delay before each message goes out — e.g. 0 days/0 hours/0 minutes for an immediate send, then a delay of a few days for the next step, and so on.

Step 18: Test your sequence

Click Test, enter an email address, and see exactly how the message will look to a real recipient before anything goes live.

Step 19: Save, then click Next

Stage 5 — Add contacts

Three ways to give the agent people to talk to:

- CSV import — click CSV, then Import CSV File, map your columns (email→email, name→name, phone→phone, company→company), click Continue, review, then Import.
- An existing list already saved in your account.
- Add contacts manually, one at a time.

Step 20: Confirm your leads were added

Click Proceed once you can see them attached to the campaign.

Stage 6 — Lead capture setup

Step 21: Decide whether to enable automatic lead capture

If you want this campaign to keep growing on its own, enable the Lead Capture widget or an embedded form so new visitors are added automatically. If you're targeting a fixed, specific list, leave this off and click Next.

Stage 7 — Scheduling

Step 22: Choose how many days the campaign should run

Step 23: Set your audience's timezone

Step 24: Choose the time of day messages should send

Pick the window your audience is actually likely to check messages — e.g. business owners tend to check email in the morning or early afternoon rather than late at night. The right timing measurably improves open and response rates.

Step 25: Enable randomization (recommended)

This varies how many emails/calls go out per day so outreach looks natural rather than obviously automated.

Step 26: Confirm your sending accounts

Scroll down and verify the correct connected email/phone senders are selected.

Stage 8 — Review and deploy

Step 27: Click Review

See the full details of your campaign in one place — sequence, contacts, schedule, and senders.

Step 28: Click Deploy Agent

Your campaign goes live. The agent begins sending, following up, and engaging leads automatically based on the sequence you designed.

Extra power tools available to your agent

- Done-For-You Templates — a library of professionally written, tested email swipes, call scripts, and follow-up messages for specific niches and goals, which your agent can pull into a sequence directly.
- Dynamic Proposals — fully personalized proposals sent via email, SMS, or WhatsApp as part of outreach, follow-up, or even mid-call; Clientforce tracks opens, clicks, and engagement per proposal to guide who gets nudged, called, or reminded next.
- Website chat widget — deploy your agent as a live chat assistant on your site; it answers questions, captures lead info, offers an instant callback, and pushes new leads straight into the pipeline (see Part Seven).
- Zapier and other integrations — connect tools you already use, e.g. syncing a payment provider through Zapier so payments and conversions are tracked automatically against the lead who paid.
- Unified Inbox — every email, SMS, and WhatsApp conversation lands in one place, labeled and organized by lead, so you always have full context.

What the agent needs to work well

- A clear, specific outcome — not just "engage people."
- A thorough Knowledge Source document.
- Correctly connected channels for every step type in the sequence (e.g. a connected phone number if the sequence includes a call step).

> **IMPORTANT:** A poorly configured agent is worse than no agent. A generic agent with no clear instruction and no defined outcome drifts, can hallucinate details, and wastes leads. Train each agent for one specific goal.

11. Part Seven — Getting Leads into the System

Clientforce supports several ways to bring leads into a campaign. Use as many as make sense for your use case.

Method	How it works
Manual upload	Upload an existing list (e.g. CSV) directly into Clientforce.
Lead Finder	Clientforce's built-in prospecting tool searches for new leads matching your criteria.
Forms	Build a form in Clientforce and embed it on your website or elsewhere; each submission becomes a lead and can trigger your agent to start messaging automatically.
Widget	Embed your AI Agent directly on your website as a chat widget so visitors can talk to it and be routed into your system.
Chrome Extension	The Clientforce LinkedIn extension — capture leads directly from LinkedIn as you browse (see 7.4 below).
Auto-prospecting	Set your agent to automatically find and feed in new leads on a schedule, so your pipeline keeps filling without manual effort.

> **NOTE:** Don't wait exclusively on the Lead Finder. If you already have existing customers or contacts, upload them directly — this is often the fastest way to get your first campaign generating results.

7.1 Finding new prospects with Lead Finder

Lead Finder is Clientforce's built-in prospecting search — use it when you don't yet have a list and need to find people who match your ideal customer.

Step 1: Open Lead Finder

From the main menu, select Lead Finder.

Step 2: Set your search criteria

Narrow by the filters available — typically industry, location, company size, job title/role, and similar firmographic details. The more specific your criteria, the more relevant (and usable) the results.

Step 3: Run the search

Review the list of matching prospects returned.

Step 4: Select the prospects you want

Choose individual results or select all, depending on list size and quality.

Step 5: Send selected leads to a campaign

Add them directly to an existing campaign, or export/save them to your Leads list to assign later.

> **NOTE:** Lead Finder searches draw from a shared quota, so very broad searches burn through it faster than targeted ones. Narrow your filters before running the search rather than after.

7.2 Importing or capturing leads with a CSV

Use this when you already have a list — existing customers, a purchased list, or an export from another tool.

Step 1: Prepare your CSV file

Include one column per field you want to capture — at minimum name, email, and/or phone number. Keep column headers simple and consistent (e.g. first_name, last_name, email, phone).

Step 2: Go to Leads (or your campaign's Leads tab) and choose Import

Step 3: Upload the CSV file

Select the file from your computer.

Step 4: Map your columns to Clientforce's lead fields

Clientforce will show your CSV's columns alongside its expected fields (Name, Email, Phone, Company, etc.) match each one so the data lands in the right place.

Step 5: Check for duplicates

Review any duplicate-detection warnings before confirming — avoid importing the same contact into a campaign twice.

Step 6: Confirm the import

Your leads are added to the workspace and, depending on your settings, can be assigned directly into a running campaign.

NOTE: A clean CSV import is worth the extra few minutes: consistent formatting (especially phone numbers and email addresses) up front avoids messages failing to send later.

7.3 Turning Clientforce into an unlimited lead-generation machine

This is where the individual lead-input methods combine into a continuous pipeline rather than a one-time list. The idea: instead of manually running a Lead Finder search or uploading a CSV each time you need leads, you set up multiple lead sources to feed your campaigns automatically and repeatedly.

Step 1: Layer your sources

Combine at least two of: Lead Finder (scheduled), a website form, the embeddable widget, and/or the Chrome extension — so leads arrive from more than one direction at once.

Step 2: Schedule auto-prospecting

Configure Lead Finder (or your agent's auto-prospecting setting) to run searches on a recurring schedule against your saved criteria, instead of manually re-running searches.

Step 3: Route every source into the same campaign

Point form submissions, widget conversations, and scheduled Lead Finder results at the same campaign (or a clearly defined set of campaigns) so nothing collects in a dead-end list.

Step 4: Let new leads auto-trigger outreach

With auto-trigger enabled, each new lead — regardless of which source it came from — starts the campaign sequence immediately rather than waiting for manual review.

Step 5: Monitor volume vs. quality

Check the Leads tab regularly. If automated sources are producing large volumes of poor-fit leads, tighten your Lead Finder criteria or form qualification questions rather than turning the source off entirely.

IMPORTANT: "Unlimited" describes the pipeline mechanics (leads can keep flowing in without manual work), not your account's credit balance — SMS and call usage against a larger, always-growing lead list will draw down credits faster, so keep an eye on Part Nine (Credits & Billing) as volume increases.

7.4 Finding leads on LinkedIn with the Chrome extension

Use this to prospect directly on LinkedIn and pull qualified profiles straight into Clientforce.

Step 1: Open the LinkedIn extension page

From the top menu, go to Tools → LinkedIn Lead Extension.

Step 2: Click Install Chrome Extension

This takes you to the Chrome Web Store.

Step 3: Click Add to Chrome

Allow a few minutes for it to download and install.

Step 4: Pin the extension

Click the extensions icon in Chrome and pin the Clientforce extension for easy access.

Step 5: Sign in

Open the extension and log in with your Clientforce credentials.

Step 6: Search LinkedIn for your target audience

Use LinkedIn's own search — by industry, job title, niche, or any audience you want to prospect.

Step 7: Click the Clientforce extension icon, then Find Emails

The extension scans the profiles on the current results page and extracts available lead information. This may take a few moments depending on the number of results.

Step 8: Click Add Emails

Choose an existing list to add these leads to, or create a new one.

Step 9: Confirm

Your leads are added to your Clientforce account automatically and are ready for outreach, nurturing, or campaign automation.

12. Part Eight — Managing Live Campaigns

Once a campaign is running, Clientforce gives you several views into how it's performing:

Tab/Area	What you'll find
Overview	Key performance metrics for the campaign — sends, opens, replies, and total leads, updating in real time as the campaign runs.
Activity	Every action taken within the campaign, in order.
Health	Flags any issues that need your attention (e.g. a failed send or a channel problem).
Inbox	Every reply across every channel, in one unified thread — you can reply directly without leaving the platform.
Sequence	The step-by-step messaging flow. You can edit it or create a new one from here at any time.
Call Log	A record of calls placed by the AI Agent, including recordings/playback where available.

Tab/Area	What you'll find
Leads	All leads attached to the campaign, including new leads as they arrive, sortable by status/trigger.
Settings	Campaign-level configuration — including timezone and which Knowledge Base the campaign uses.

> **NOTE:** Editing the Sequence tab only affects leads who haven't started that sequence yet. Leads already active in a sequence continue on the version they started with; new leads follow the updated version. This is intentional — it keeps a live campaign stable while you improve it.

The end goal of every campaign

Clientforce is a two-way system, not just an outbound blaster. Every campaign is built around a defined outcome — a booked call, a link click, a proposal viewed, or a payment made. The Inbox is where you'll see and act on real conversations as they happen.

13. Part Nine — Credits & Billing Basics

Think of credits as the fuel that powers any action inside Clientforce with a real-world communication, processing, or data-enrichment cost. Not every action uses credits — understanding which do will help you avoid surprises as your campaigns scale.

What costs credits

Action	Approximate credit cost
Email outreach	0 credits — free at any volume
SMS message	≈ 55 credits per message
Phone call	≈ 25 credits per minute (a 5-minute call ≈ 125 credits)
Lead enrichment	≈ 2 credits per successful enrichment

The total credits a campaign uses depend on the number of leads, how many sequence steps are configured, which channels are used, and how long any phone conversations run. An email-only campaign costs zero credits regardless of volume; a campaign that adds SMS, calls, or enrichment will draw down credits based on what's actually used.

How the credit model works

- Clientforce uses a usage-based model — credits are only deducted when a qualifying action is successfully executed.
- If credits are allocated to a campaign for outreach that never actually executes, those credits are not lost — unused credits are automatically returned to your wallet balance and stay available for future campaigns.
- Credit does not renew monthly by default — it depends on your specific subscription type. Bundle-plan accounts include a generous amount of credit for SMS and calls; one-time ("FE") plans need to be topped up when credit runs out.
- There is no monthly limit on the number of calls or minutes — the only limit is your account's total available credit.
- Because calls only fire when a lead meets specific criteria (a targeted, not blanket, action), credit tends to last much longer than expected — accounts with 10,000 credits have run close to a year.
- You'll receive an alert when a workspace runs low on or runs out of credit.

Where credits live: the Account Admin Workspace

Credits are managed centrally, not per-workspace. Only the account admin can purchase and distribute credits — this keeps control of account resources centralized even if you run multiple client workspaces.

9.1 Viewing your balance

1. From your dashboard, click your profile menu.
2. Go to the wallet or credit-usage section to see your balance, transaction history, and allocations across workspaces.

9.2 Purchasing (topping up) credits

Step 1: Switch to the Account Admin Workspace

Use the workspace selector at the top of the dashboard.

Step 2: Open Plans and Billing

Profile menu → Settings → Plans and Billing.

Step 3: Click Add Credit

This opens the purchase page.

Step 4: Enter the amount of credits to purchase

Then fill in your payment details and confirm.

Step 5: Confirm the credits landed in your wallet

Once payment succeeds, the credits are added to your wallet balance automatically and are ready to allocate.

9.3 Allocating credits to a workspace

Step 1: Switch to the Account Admin Workspace

Step 2: Open Plans and Billing

Profile menu → Settings → Plans and Billing.

Step 3: Scroll to your list of workspaces

You'll see every workspace on the account.

Step 4: Enter the number of credit units to allocate to a workspace

Confirm your selection.

Step 5: Done

Those credits are immediately available for that workspace's campaigns and automations. You can return to this page any time to adjust allocations.

> **NOTE:** Creating a new workspace does not cost credit, but each new workspace starts at zero and must be allocated credit from your total account balance before its campaigns can run.

14. Worked Example — Appointment-Setting Campaign

This walks through the entire flow end to end for one of the most common use cases: getting more booked appointments/calls for a service business.

Step 1: Set your goal

Goal = "Get more booked appointments."

Step 2: Have your booking link ready

You'll need the exact call-to-action URL — e.g. your booking page — before you start creating the campaign.

Step 3: Confirm your channels are connected

At minimum, email; ideally also phone/SMS for follow-up and closing.

Step 4: Prepare your Knowledge Source document

Describe your service business clearly (see Part Four).

Step 5: Create the campaign

Go to Agents → Add Agent. Enter your business details, upload your Knowledge Source document, and set your goal to appointments/bookings. When asked for your call-to-action URL, provide your booking page link.

Step 6: Bring in leads

Either upload your existing customer/contact list, or connect a lead-input method from Part Seven.

Step 7: Let the campaign run

New leads enter the campaign automatically. The agent sends the first touch, follows up on a defined sequence, and at the right moment shares your booking link. Once the lead books, the call is scheduled automatically.

Step 8: Monitor and adjust

Watch the Inbox for replies and the Leads tab to see where each prospect is in the flow.

This is one example outcome. The same pattern — goal → channels → Knowledge Source → campaign → leads — applies to any use case: getting more contacts, more proposal views, more sales, and so on.

15. Frequently Asked Questions

Q: How much does each action actually cost in credits?

A: Email is free (0 credits). SMS is about 55 credits per message. Phone calls are about 25 credits per minute. Lead enrichment is about 2 credits per successful enrichment. See Part Nine for the full breakdown.

Q: If I allocate credits to a campaign but it doesn't use them, do I lose them?

A: No. Clientforce only deducts credits for actions that are actually executed. Any allocated-but-unused credit is automatically returned to your wallet balance for future use.

Q: Do I need to use a dedicated email address for Clientforce?

A: No. You can use the normal email account you already send from. Just be mindful of sending volume when you're first getting started — warm up your inbox gradually to avoid being flagged as spam.

Q: If I create an agent but haven't set up email or phone yet, what happens?

A: The campaign will not be able to run the steps that use that channel until it's connected. You can add the channel later — the campaign begins working as soon as the missing channel is set up.

Q: Can my AI Agent actually close a lead?

A: Yes. Closing (the defined end goal) can happen by phone call, SMS, or any connected channel, depending on how the campaign is configured.

Q: Is Clientforce integrated with GoHighLevel?

A: Yes, via Zapier. Direct native integrations are expected to expand over time.

Q: Can I use my own Twitter/X account?

A: You cannot use your personal account directly, but you can use a Clientforce-provisioned number/account for that channel where supported.

Q: Are phone numbers verified for use on major US carriers?

A: Numbers are provisioned through Twilio and have strong support across most major US carriers, though not every carrier is guaranteed. Some international numbers (e.g. certain France purchases) have had known issues — contact support if a purchase fails.

Q: Is there a monthly limit on call minutes?

A: No monthly limit — the only constraint is your account's total available credit.

Q: Can I listen to call recordings?

A: Yes, recordings are available for playback. Live call monitoring (listening in real time) was not yet available at the time of writing.

Q: Does each workspace represent a different client?

A: Yes — each workspace can represent a separate client or business, fully separated from your others.

Q: Are there charges for creating a new workspace?

A: No charge for creating one, but you must allocate credit to it from your total account balance before it can run campaigns.

Q: Will Clientforce add channels like Facebook/Instagram DMs?

A: Possibly — Clientforce has a separate platform for DMs and is evaluating a direct integration.

16. What's Coming Next

Features and improvements confirmed as in progress at the time this guide was written:

- Clientforce Mailer — a fully built-in, managed email sending service (no external SMTP connection required).
- Gmail and Google Workspace sign-in for connecting email senders directly (pending final platform approval).
- Expanded Lead Finder capacity to remove search quota errors.
- Inbox warm-up tooling to protect email sender reputation.
- A published credit-cost breakdown by service (SMS, voice, etc.).
- Live-call monitoring, in addition to existing call recordings.
- Possible direct DM/social integrations (Facebook, Instagram, etc.).

Where the rest of this guide will come from

Future mentorship sessions — and future updates to this guide — will cover:

- Week 2 — Channels deep dive: full SMTP/IMAP setup, SMS regulations and send windows, AI voice setup.

- Week 3 — Campaigns: building campaign types and matching them to business goals.
- Week 4 — Auto-Prospecting: forms, the widget, the Lead Finder, and the Chrome extension in depth.
- Week 5 — Integrations: Stripe, Zapier, and connecting other tools.
- Week 6 — Agency Setup: turning Clientforce into a service business.
- Week 7 — Agency Marketing & Business: positioning, pricing, and client acquisition.
- Week 8 — Scaling and Growing: optimizing and expanding a working system.

17. Glossary of Key Terms

Term	Definition
Agent	The AI "brain" trained on your business that runs a campaign — messaging leads, guiding conversations, and driving them toward your defined goal.
Campaign	The engine that runs the messaging workflow: sends messages, triggers actions on replies, and moves leads toward the outcome.
Channel	A method of communication your agent uses to reach people — email, SMS, calls/voice, or WhatsApp.
Knowledge Source	The document you provide describing your business, offer, objections, and brand voice, used to train your agent.
Workspace	A container for one business or client — its own channels, agents, campaigns, and credit allocation.
Lead Finder	Clientforce's built-in prospecting tool for discovering new leads.
Widget	An embeddable chat window that puts your AI Agent directly on your website.
Credits	The unit used to pay for SMS and voice-call usage on the platform.
Call-to-Action URL	The link (e.g. booking page, checkout page) your agent directs a qualified lead to.

NSITE TECH Studios, Inc.
From Vision to Digital Reality