HuntCustomer

FIND CUSTOMERS. WIN BUSINESS.

User Guide

Everything from your first login to your first booked meeting · huntcustomer.com

Contents

1. Getting started

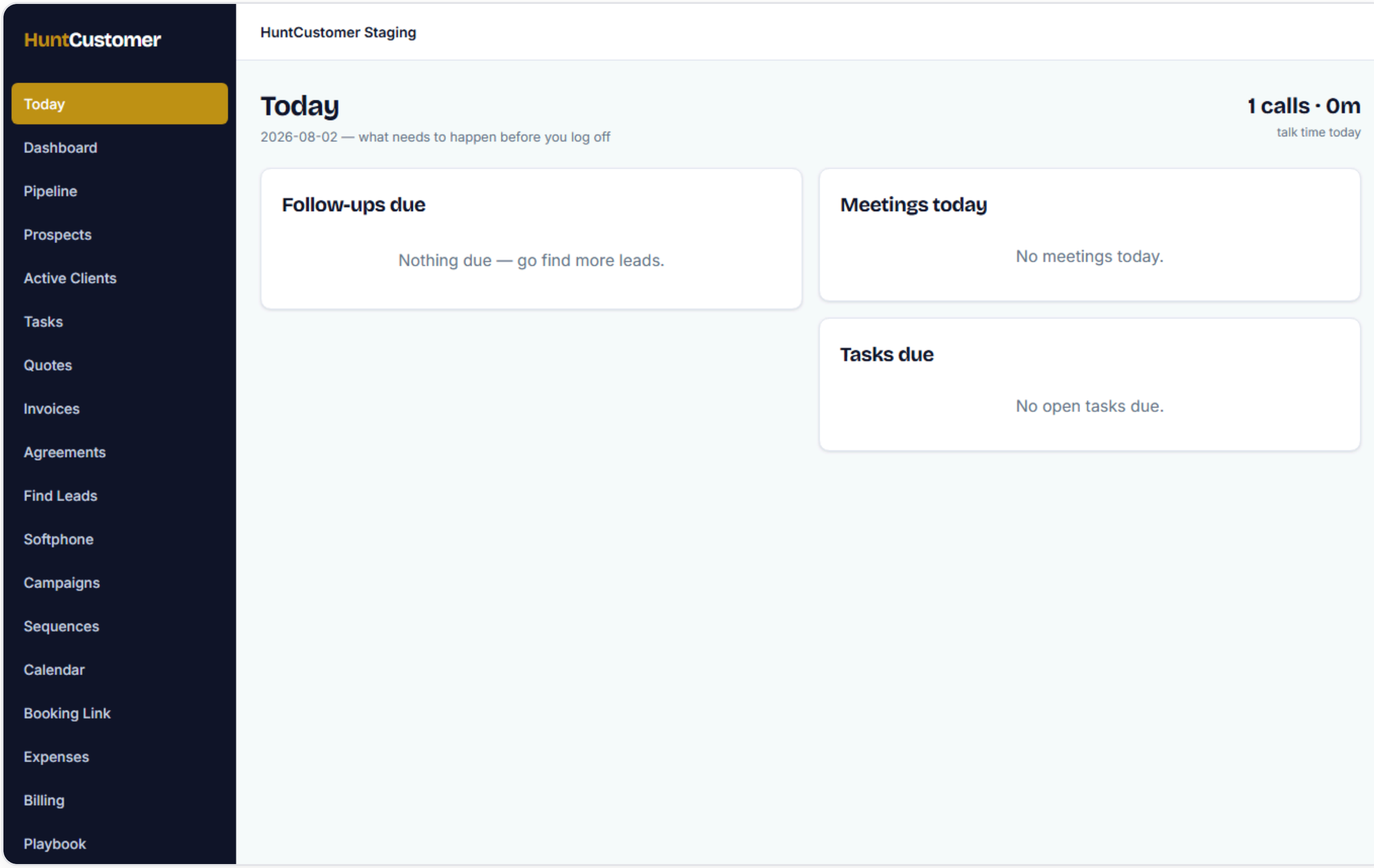
HuntCustomer is a sales platform built for teams that find, call, and close. Start your 14-day free trial at **huntcustomer.com** — every feature in this guide is included.

1. Click **Start free trial**, enter your email, workspace (company) name, and a password.
2. Add a card to activate the trial — you won't be charged until day 15, cancel anytime.
3. Under **Parameters** → **Company**, fill in your company name, address, and email — these appear on your quotes, invoices, and agreements automatically.
4. Invite your team under **Team** — each teammate gets their own login ($14.99/user/month).

> **Tip:** Do the Parameters step first. Every document you generate afterwards comes out with your letterhead already in place.

2. Today — your daily cockpit

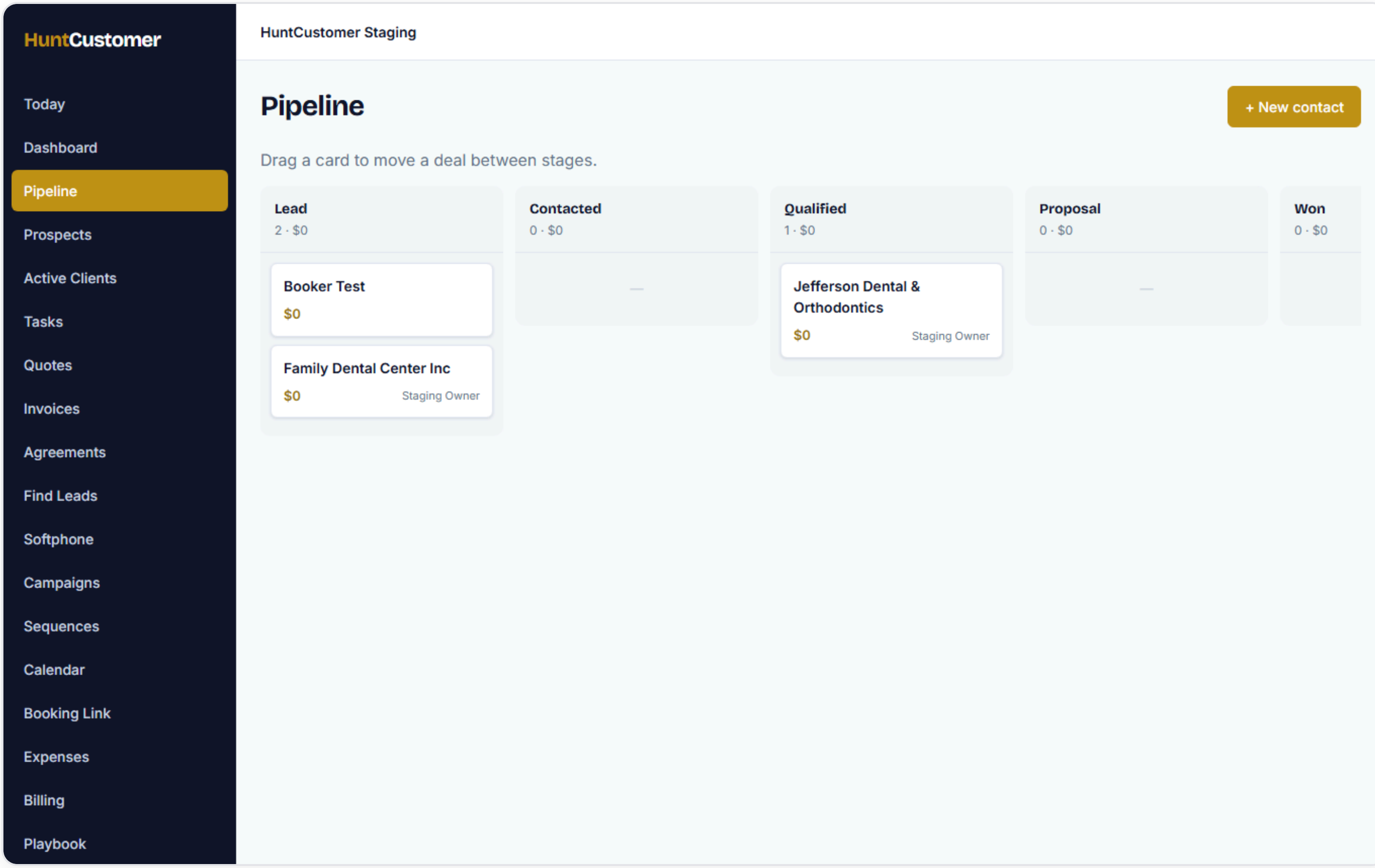
The Today page answers one question: what needs to happen before you log off? Overdue items show in red; every follow-up has a one-click dial button.



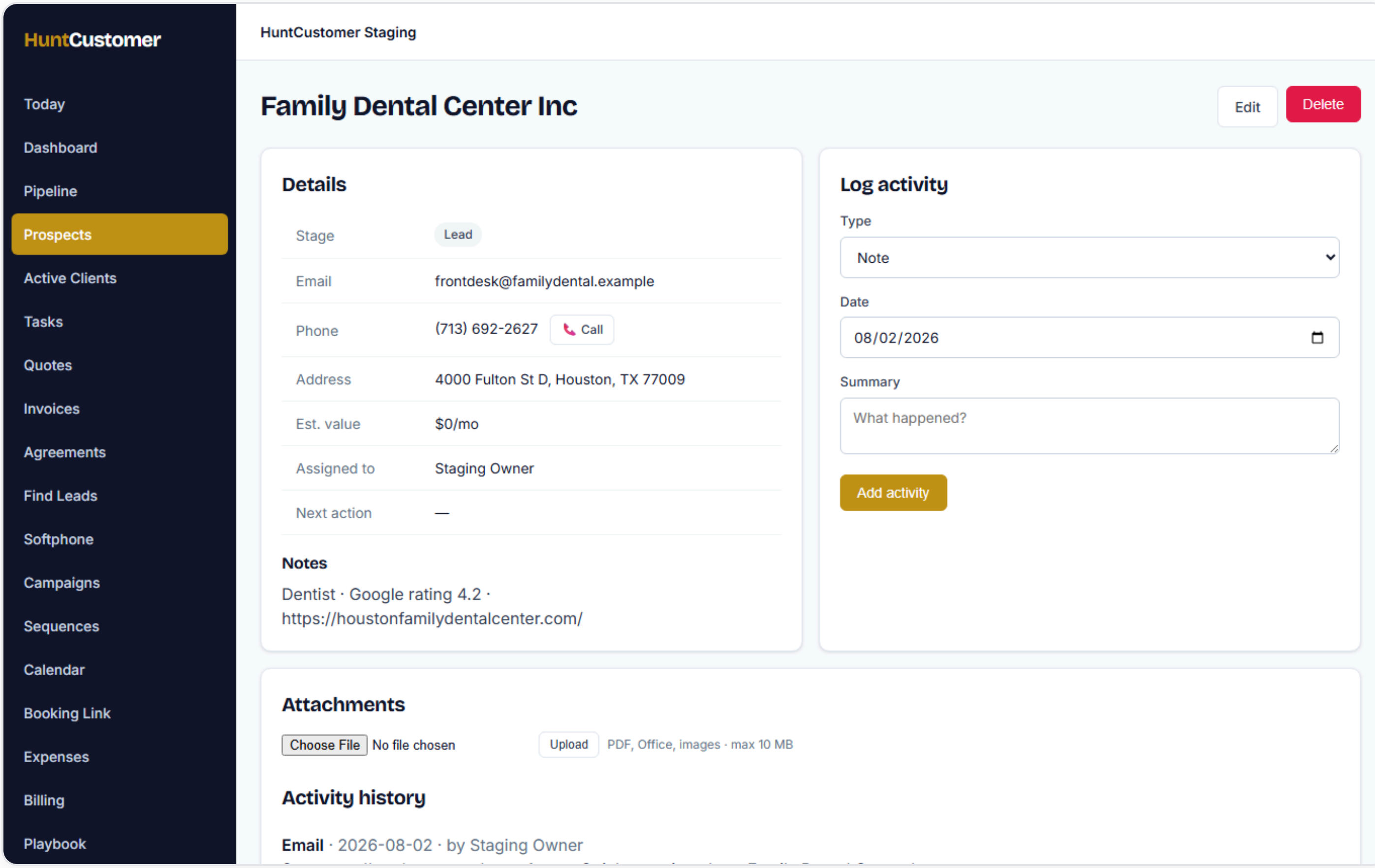
- **Follow-ups due** — every prospect whose next action is due today or overdue, with a 📞 button that opens the softphone pre-filled.
- **Meetings today** and **Tasks due** — your calendar and to-dos for the day.
- The header shows your **calls made and talk time today** — your personal scoreboard.

3. Prospects & pipeline

Every business you're chasing is a prospect. Drag them through stages on the pipeline board; everything — calls, notes, files, emails — sticks to their record.

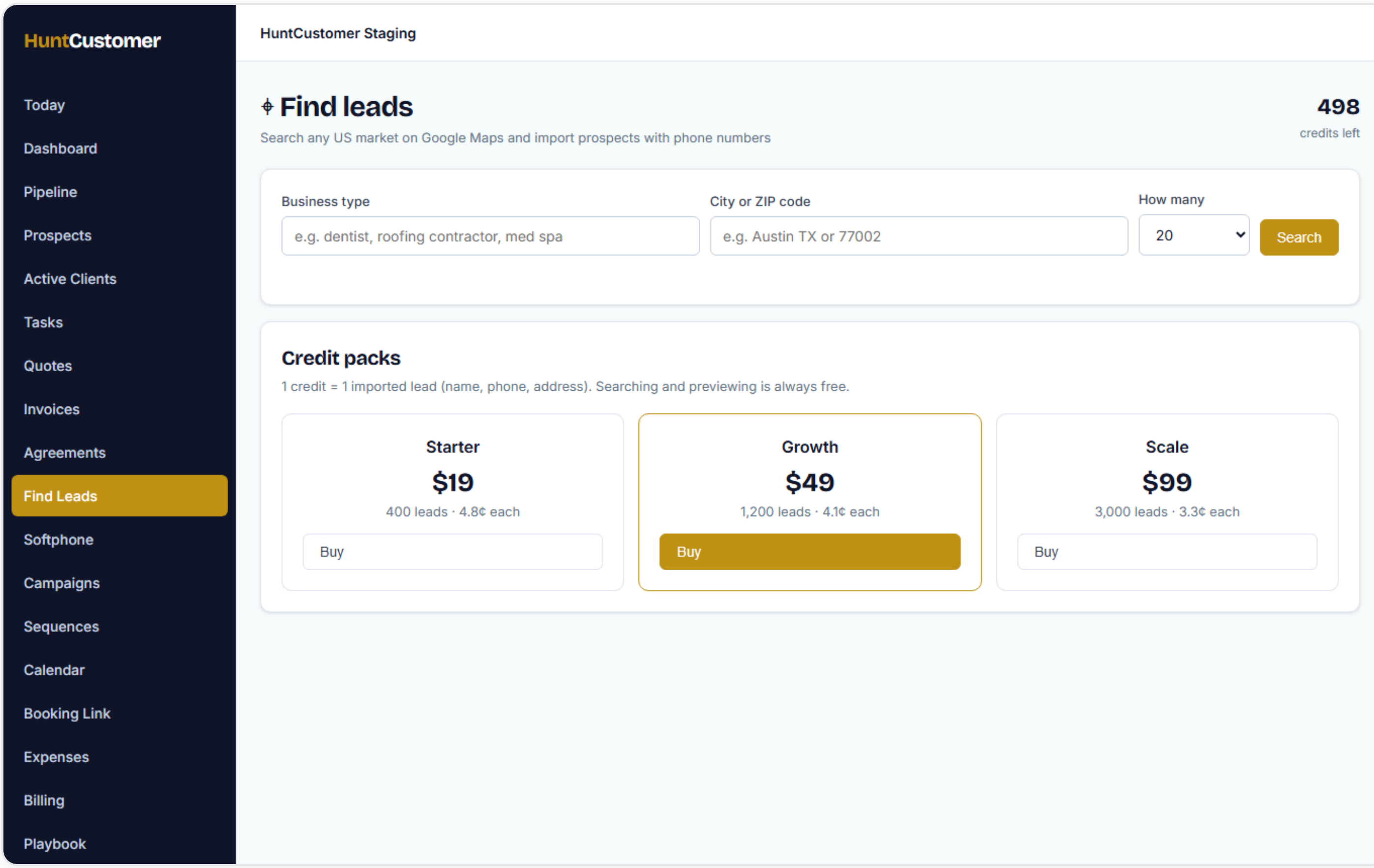


1. Drag a card between columns to change its stage — Lead → Contacted → Qualified → Proposal → Won.
2. Open any prospect to see the full record: details, activity history, tasks, and attachments.
3. Set a **next action + date** on every prospect — that's what feeds your Today page so nothing slips.
4. Upload files (contracts, photos, PDFs — up to 10 MB) directly on the prospect page.


HuntCustomer
Today
Dashboard
Pipeline
Prospects
Active Clients
Tasks
Quotes
Invoices
Agreements
Find Leads
Softphone
Campaigns
Sequences
Calendar
Booking Link
Expenses
Billing
Playbook
HuntCustomer Staging
Family Dental Center Inc
Edit
Delete
Details
Stage Lead
Email frontdesk@familydental.example
Phone (713) 692-2627 Call
Address 4000 Fulton St D, Houston, TX 77009
Est. value $0/mo
Assigned to Staging Owner
Next action —
Notes
Dentist · Google rating 4.2 · https://houstonfamilydentalcenter.com/
Log activity
Type
Note
Date
08/02/2026
Summary
What happened?
Add activity
Attachments
Choose File No file chosen
Upload
PDF, Office, images · max 10 MB
Activity history
Email · 2026-08-02 · by Staging Owner

4. Find Leads — fill your pipeline in minutes

Describe a market, get a call list. Find Leads searches Google Maps for businesses with phone numbers and imports them straight into your prospects.

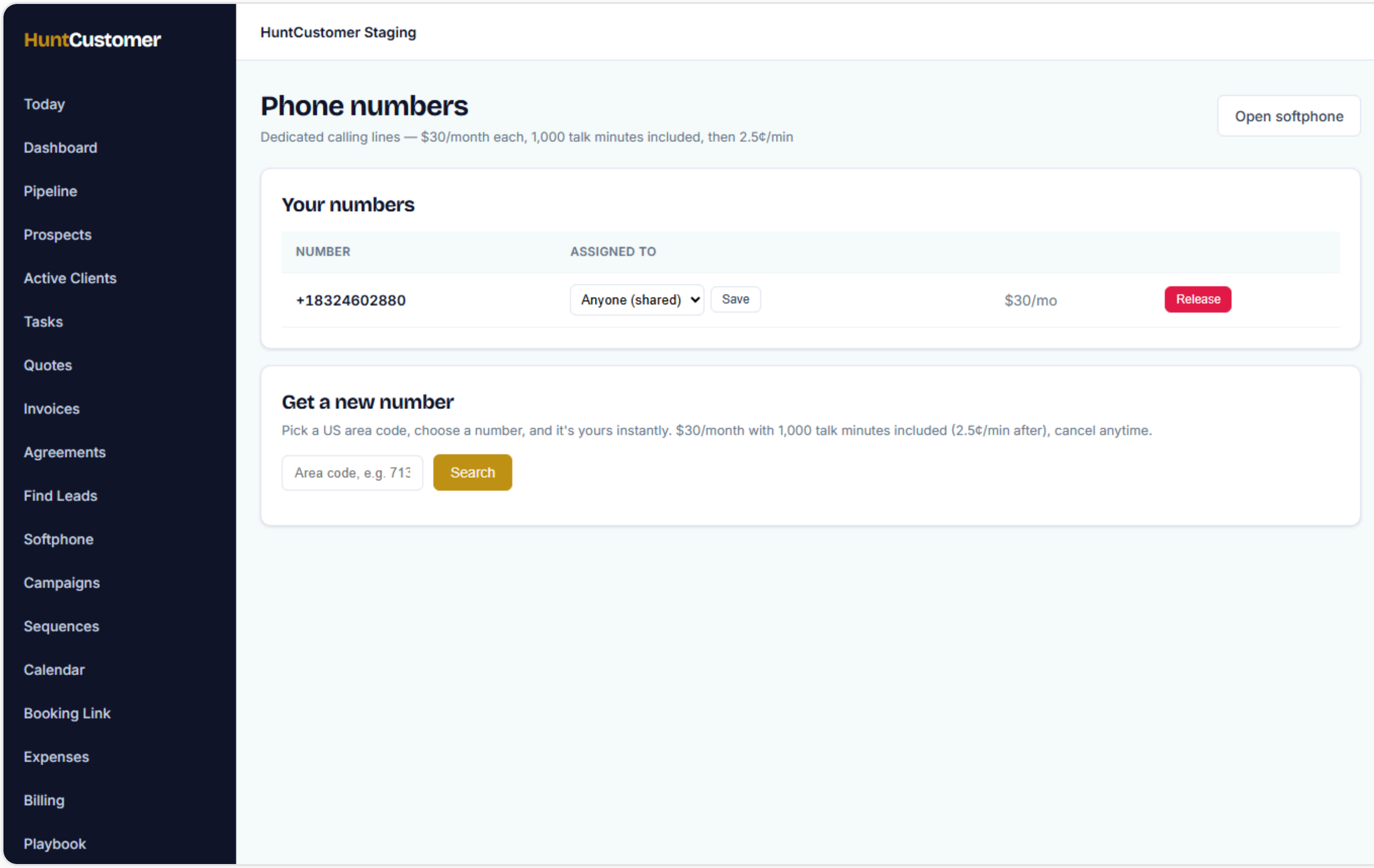


1. Enter a **business type** ("dentist", "roofing contractor") and a **city or ZIP code**.
2. Pick how many results (10–50) and hit **Search** — the hunt takes a minute or two.
3. Review the results: name, phone, category, Google rating, address. Duplicates you already have are flagged and skipped automatically.
4. Click **Import selected** — each imported lead costs 1 credit and lands in Prospects at the "Lead" stage, assigned to you.

> **Credits:** searching and previewing are always free — you only spend on import. Packs: $19 / 400 leads · $49 / 1,200 · $99 / 3,000. Buy them right on the page.

5. Phone numbers & the softphone

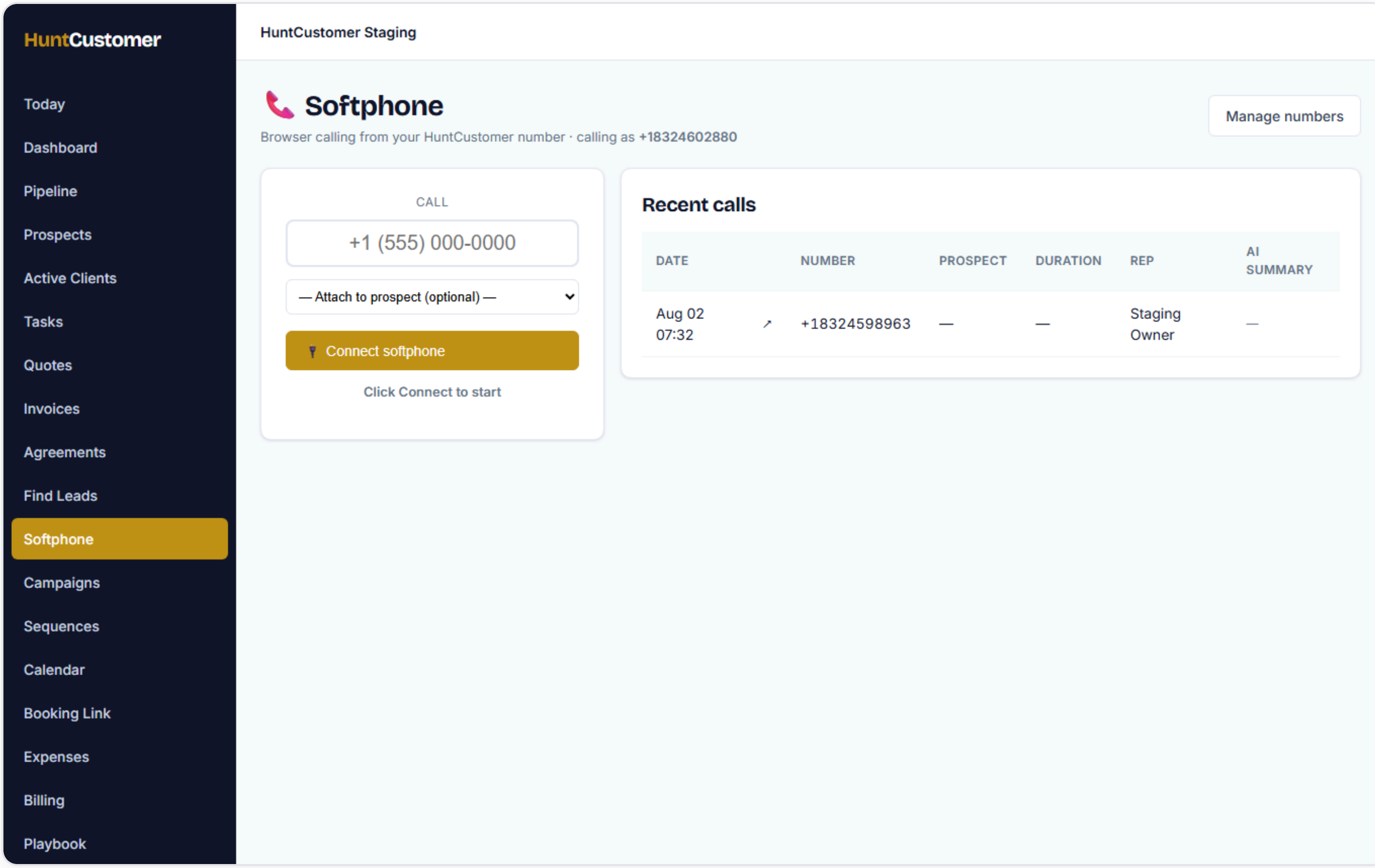
Call straight from your browser — no desk phone, no app to install. First, your workspace needs a number.



1. Under **Phone Numbers** (admins), type an area code and pick from real available numbers — yours instantly.
2. Assign a number to a specific rep (their calls show that caller ID, and inbound calls ring their browser) or leave it shared.

> **Pricing:** $30/month per line with **1,000 talk minutes included** (unanswered dials are free — only connected time counts), then 2.5¢/min. Cancel anytime.

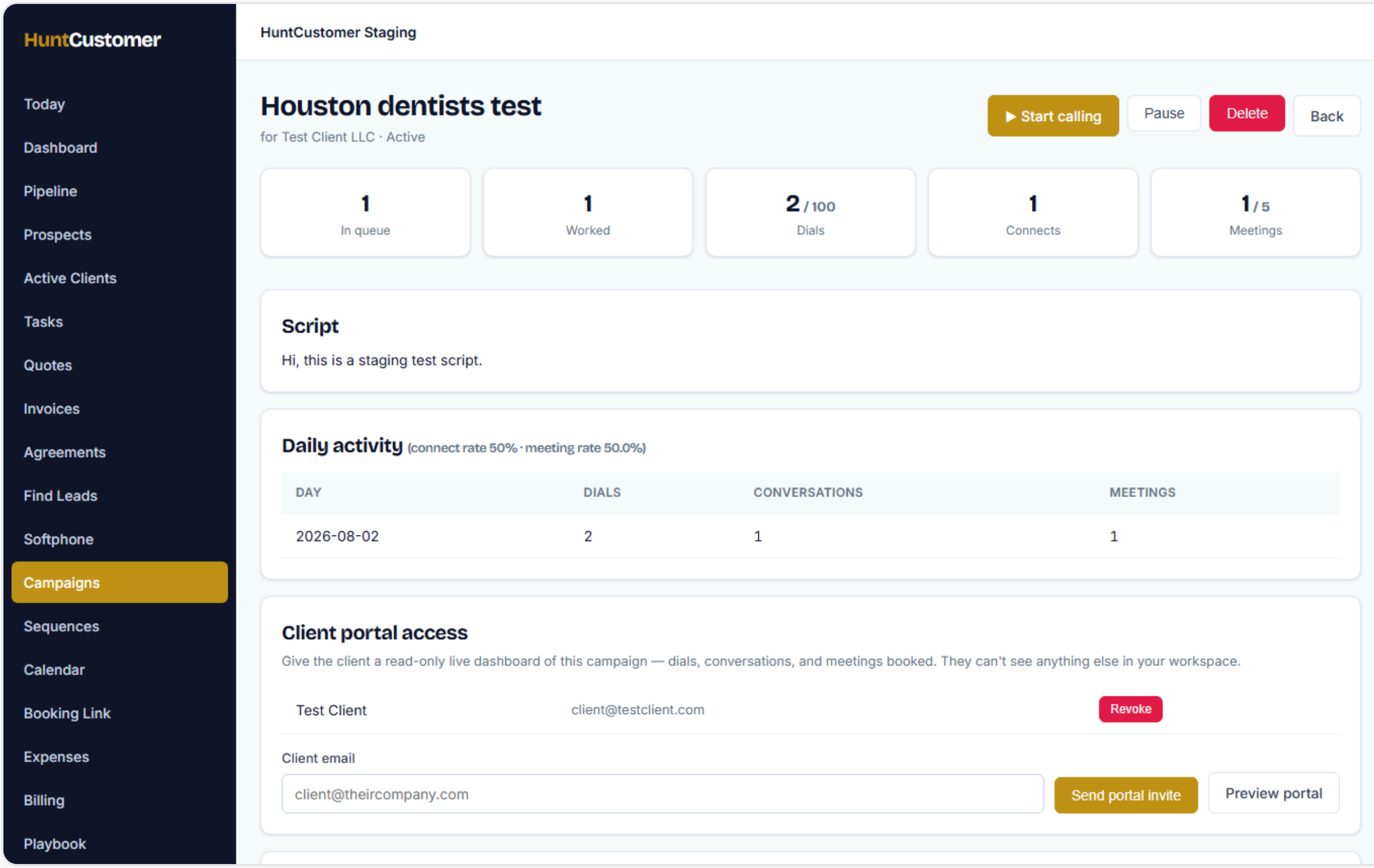
Making calls



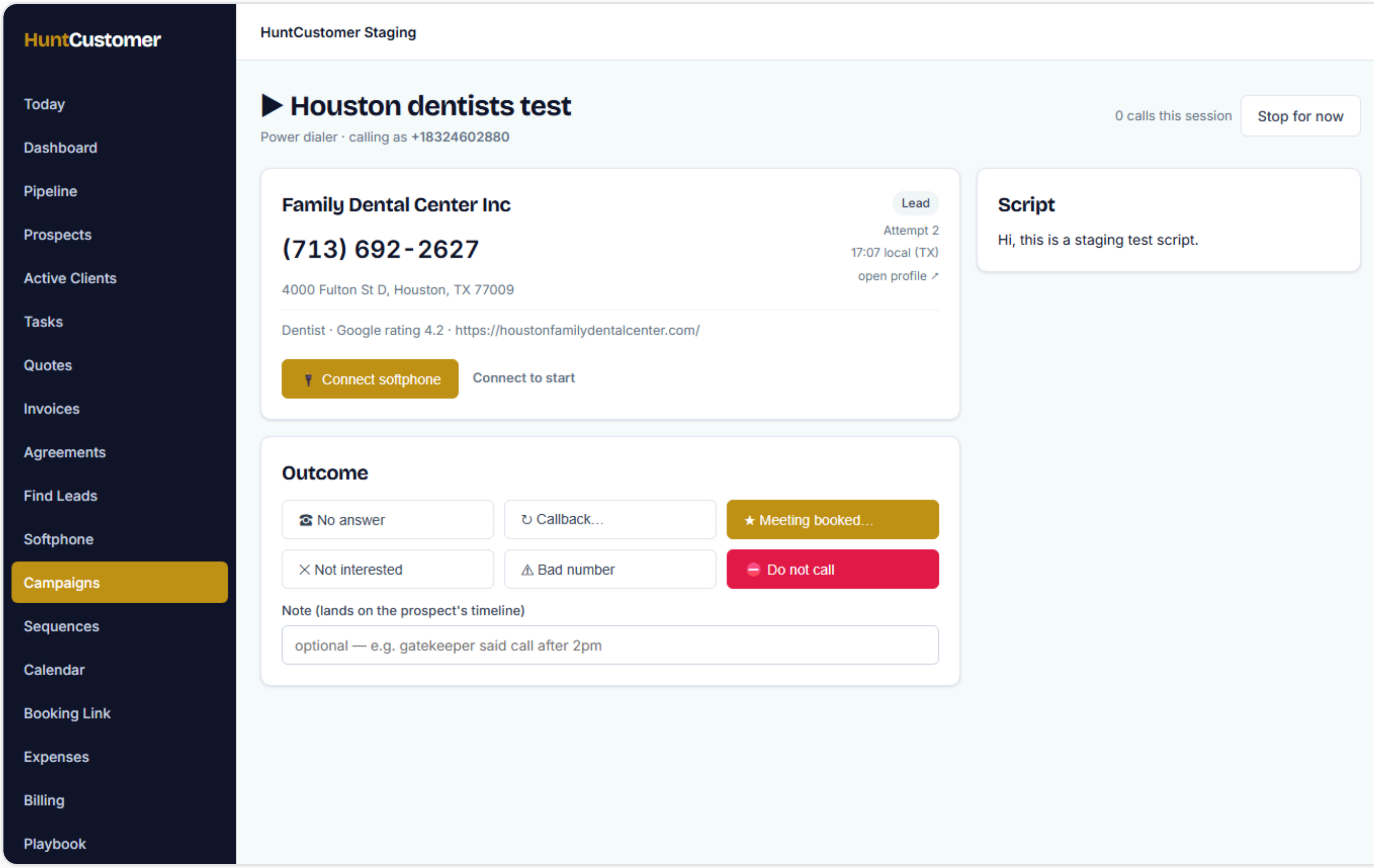
1. Open **Softphone**, click **Connect softphone**, and allow microphone access.
2. Dial any number, or pick a prospect from the dropdown — the call is logged on their timeline automatically, with duration.
3. Calls over a minute get an **AI summary**: transcribed and condensed onto the prospect's record within a few minutes, so you never type call notes again.

6. Campaigns & the power dialer

A campaign is a call list your team works through — the fastest way to turn a pile of leads into booked meetings.



1. Create a campaign under **Campaigns** — name it, set optional dial/meeting quotas, paste your call script.
2. **Add to call list**: filter your prospects by stage, cap the batch — only prospects with phone numbers get in.
3. Hit ▶ **Start calling** to enter the dialing cockpit.



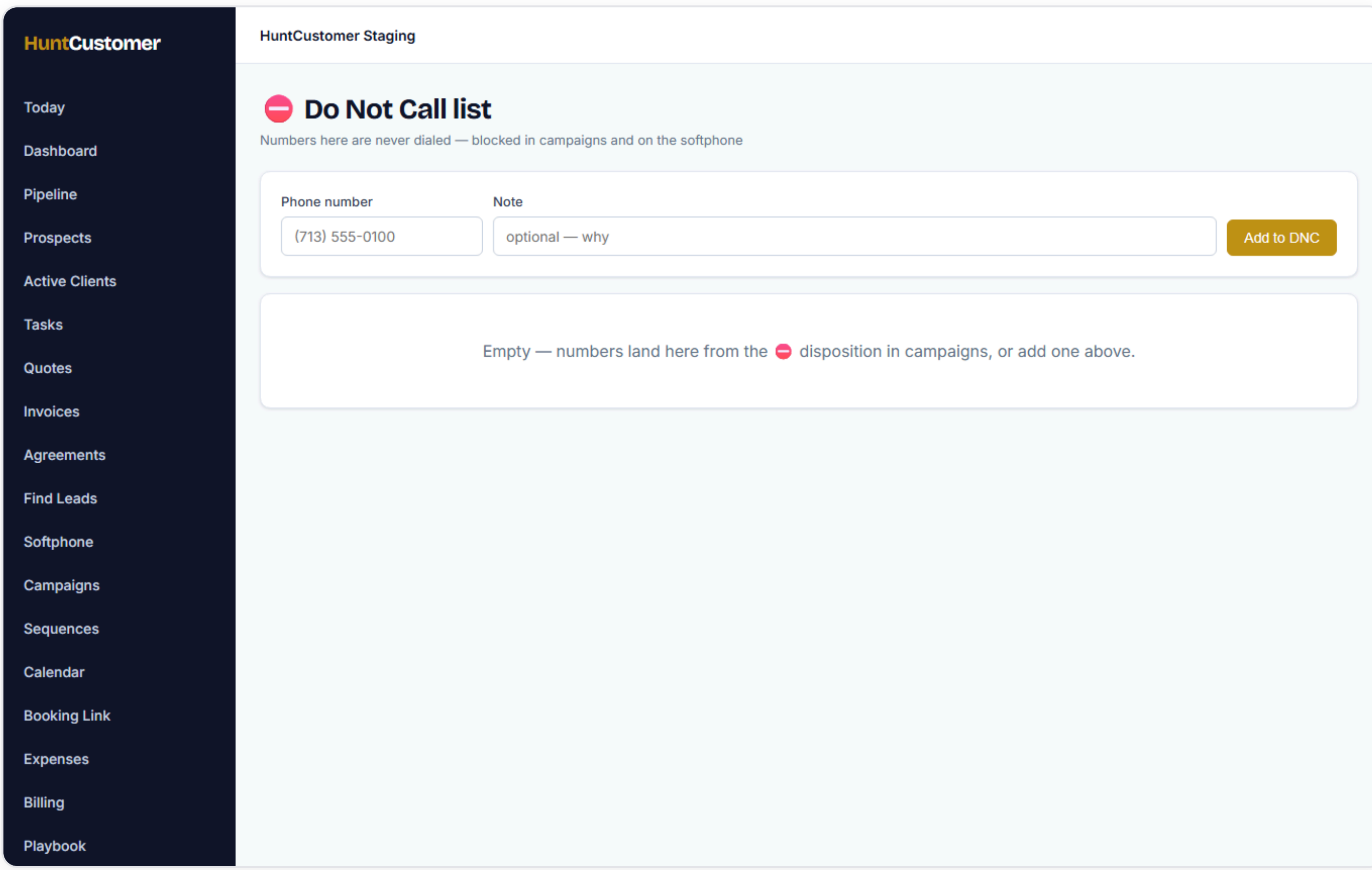
4. The cockpit serves one prospect at a time — details on the left, your script pinned on the right.
5. Call, then click the outcome: **No answer** (recycled up to 4 attempts), **Callback** (resurfaces on the date you pick), **Meeting booked** (creates the calendar meeting), **Not interested**, **Bad number**, or **Do not call**.
6. The next prospect loads automatically. Dial, disposition, next — that's the whole rhythm.

> **Stats:** the campaign page tracks dials, conversations, and meetings against quota — per campaign and per rep.

7. Staying compliant — built-in guardrails

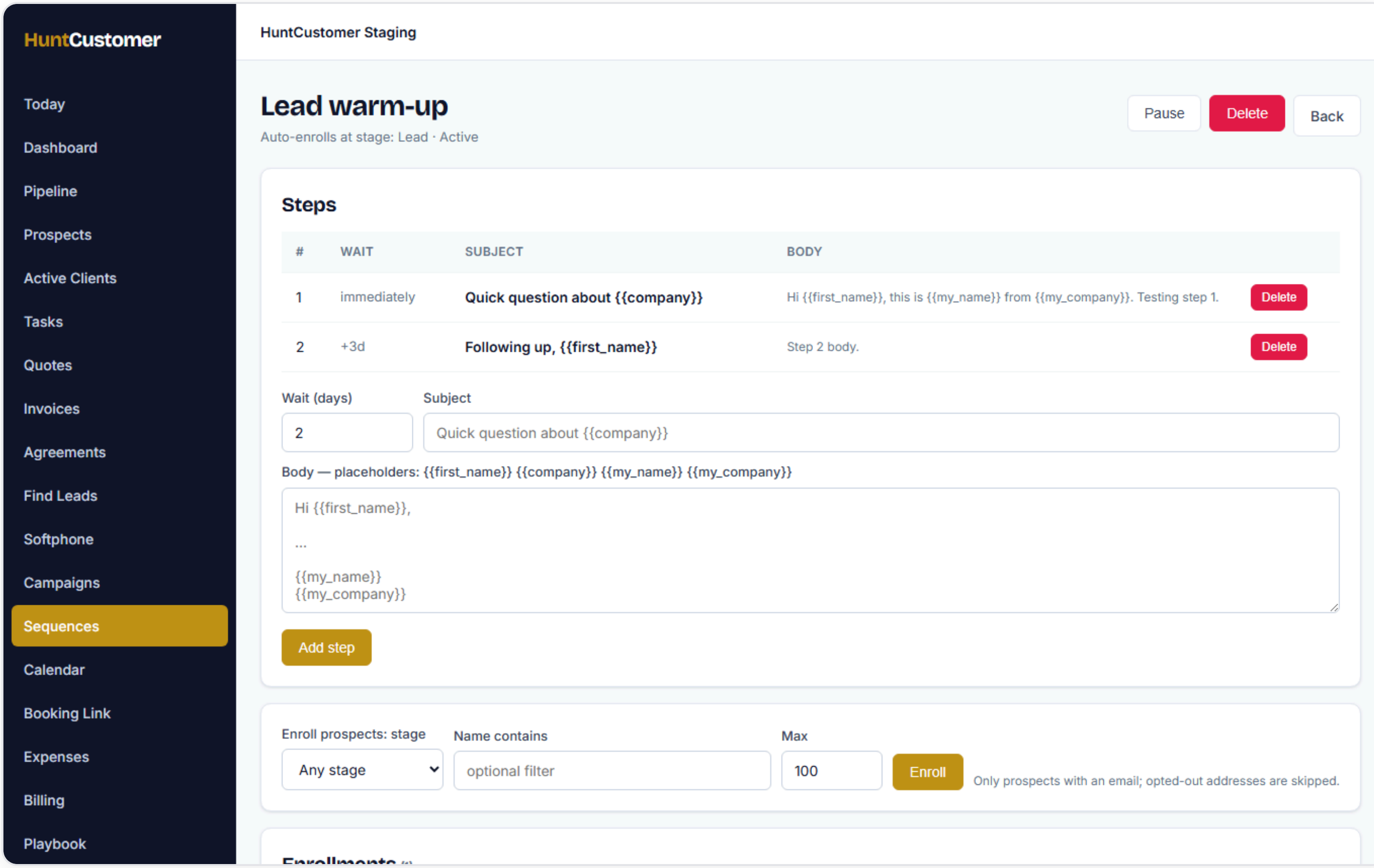
Cold-calling rules are built into the product, so your team can't break them by accident.

- **Calling hours:** every dial is checked against the prospect's local time (federal 8am–9pm window; stricter state laws like Florida's 8am–8pm are enforced automatically). Out-of-hours prospects simply aren't served — the queue tells you when to come back.
- **Do Not Call list:** one click on the ⛔ disposition and that number is never dialed again, in any campaign. Admins manage the list on the Do Not Call page.
- **Recording consent:** calls into all-party-consent states automatically have recording disabled — the cockpit shows a "recording off" badge.
- **Mobile flags:** mobile numbers are detected and flagged 📱 so reps give them extra care.



8. Email sequences

Automatic follow-up emails that keep working between calls. Write the steps once; HuntCustomer sends them on schedule and stops the moment they're not wanted.

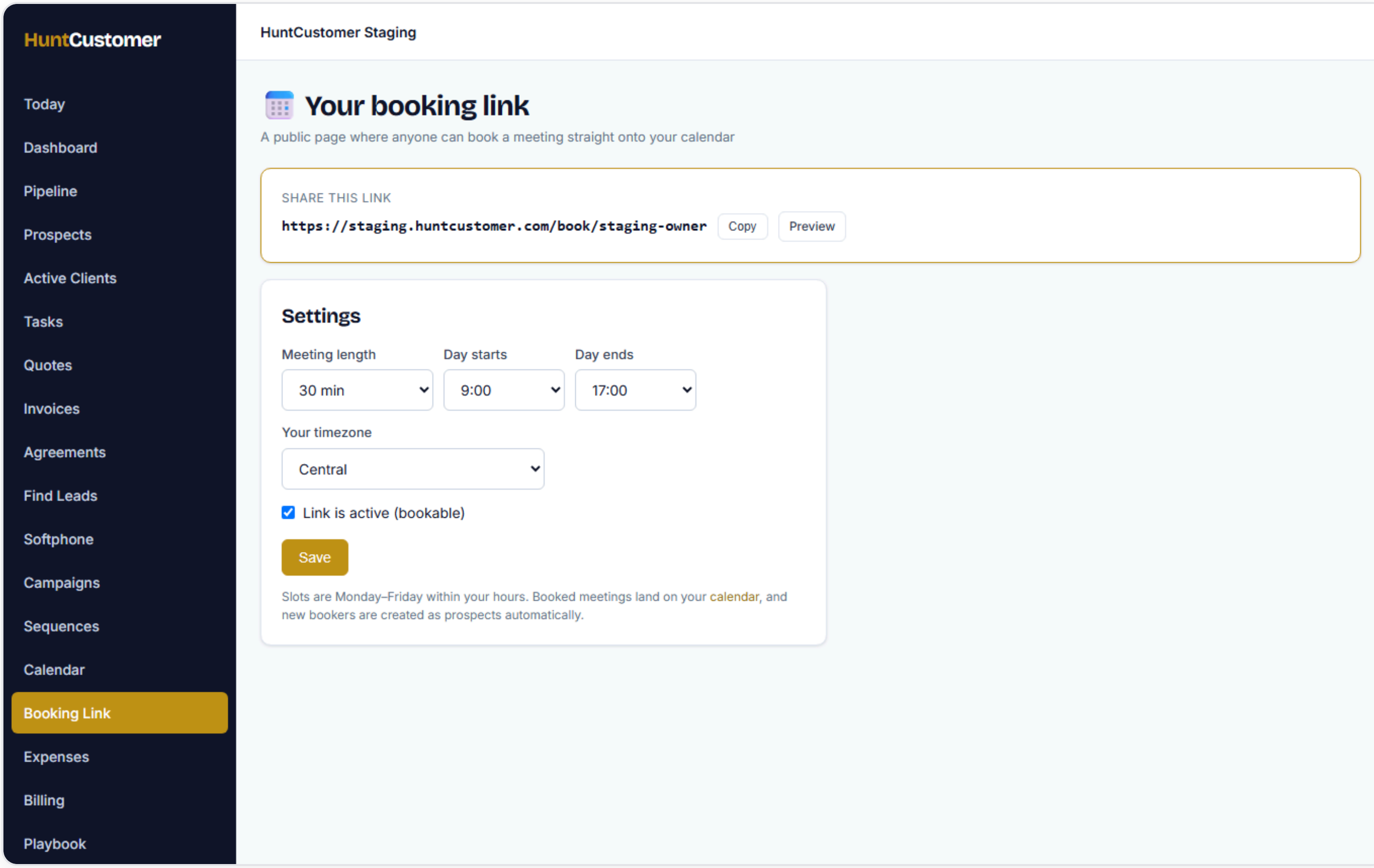


1. Create a sequence under **Sequences**. Optionally set a **trigger stage** — e.g. every new "Lead" is enrolled automatically (freshly imported leads too).
2. Add steps: wait days, subject, body. Use placeholders — **{{first_name}}**, **{{company}}**, **{{my_name}}**, **{{my_company}}** — and every email comes out personalized.
3. Enroll prospects in bulk with the stage filter, or let the trigger do it.
4. Emails send during business hours with your name on the reply-to. Every send is logged on the prospect's timeline.

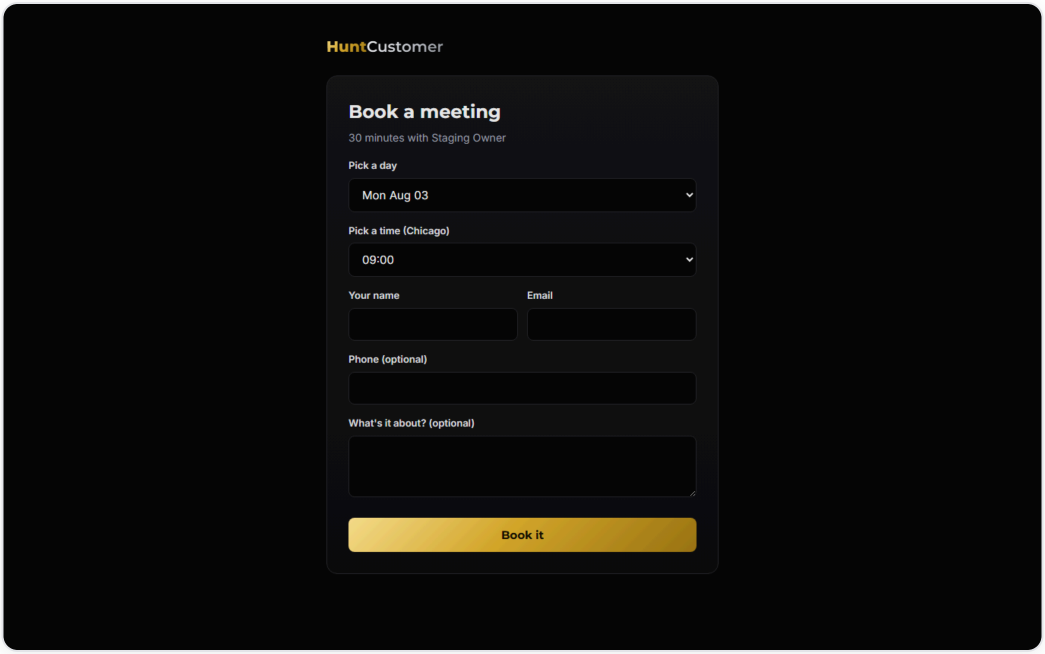
> **Automatic stops:** every email has an unsubscribe link (one click opts them out for good), and sequences halt on their own when a deal is marked Won or Lost.

9. Your booking link

A public page where anyone can grab time with you — no back-and-forth. Perfect for email signatures, sequence emails, and "can I call you back? — just book me" moments.

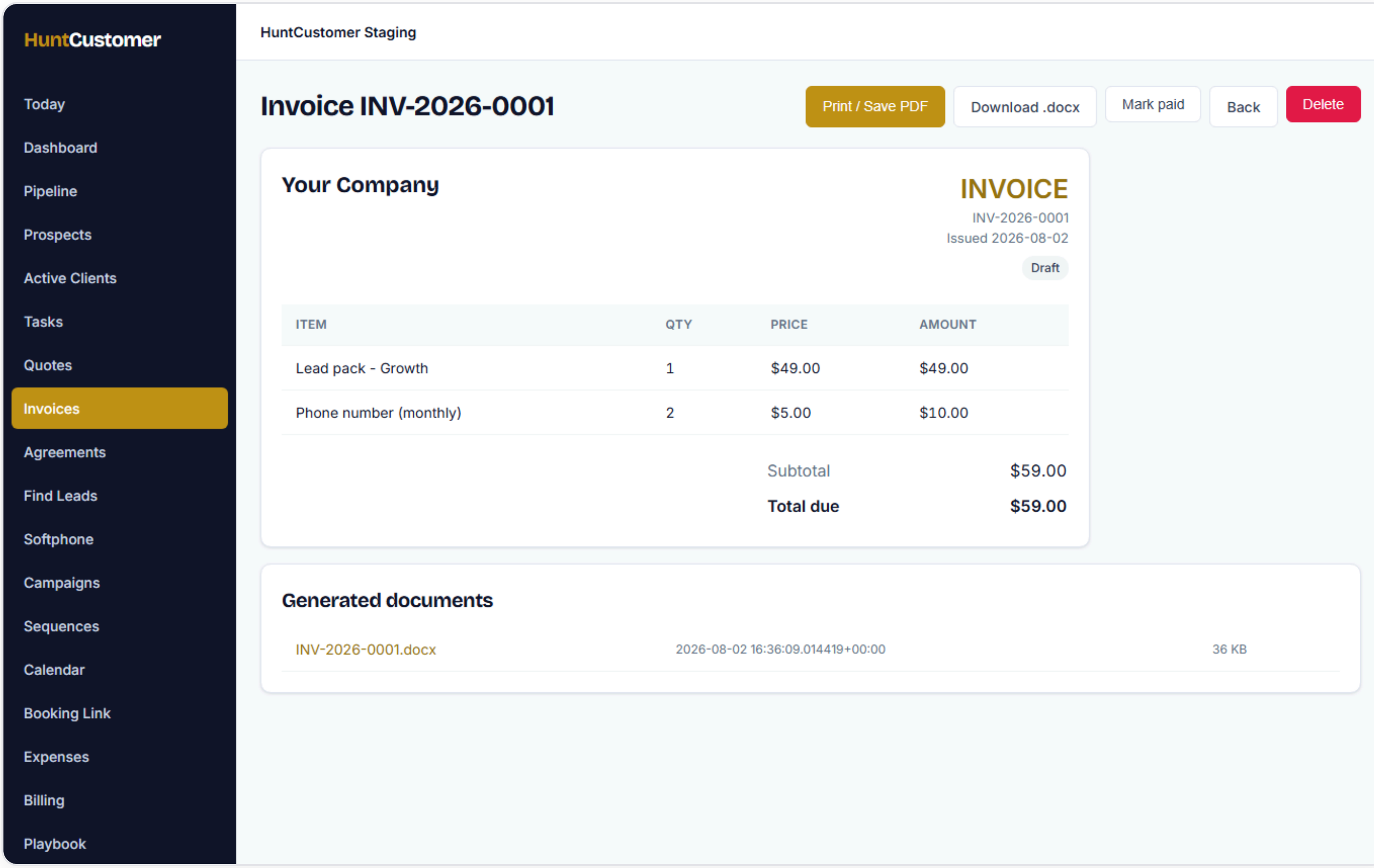


1. Under **Booking Link**, set your meeting length, working hours, and timezone → **Create booking link**.
2. Share your link (huntcustomer.com/book/your-name). Visitors see only genuinely free Mon–Fri slots.
3. When someone books: the meeting lands on your calendar, they're created as a prospect automatically, and both of you get confirmation emails.


HuntCustomer
Book a meeting
30 minutes with Staging Owner
Pick a day
Mon Aug 03
Pick a time (Chicago)
09:00
Your name
Email
Phone (optional)
What's it about? (optional)
Book it

10. Quotes, invoices & agreements

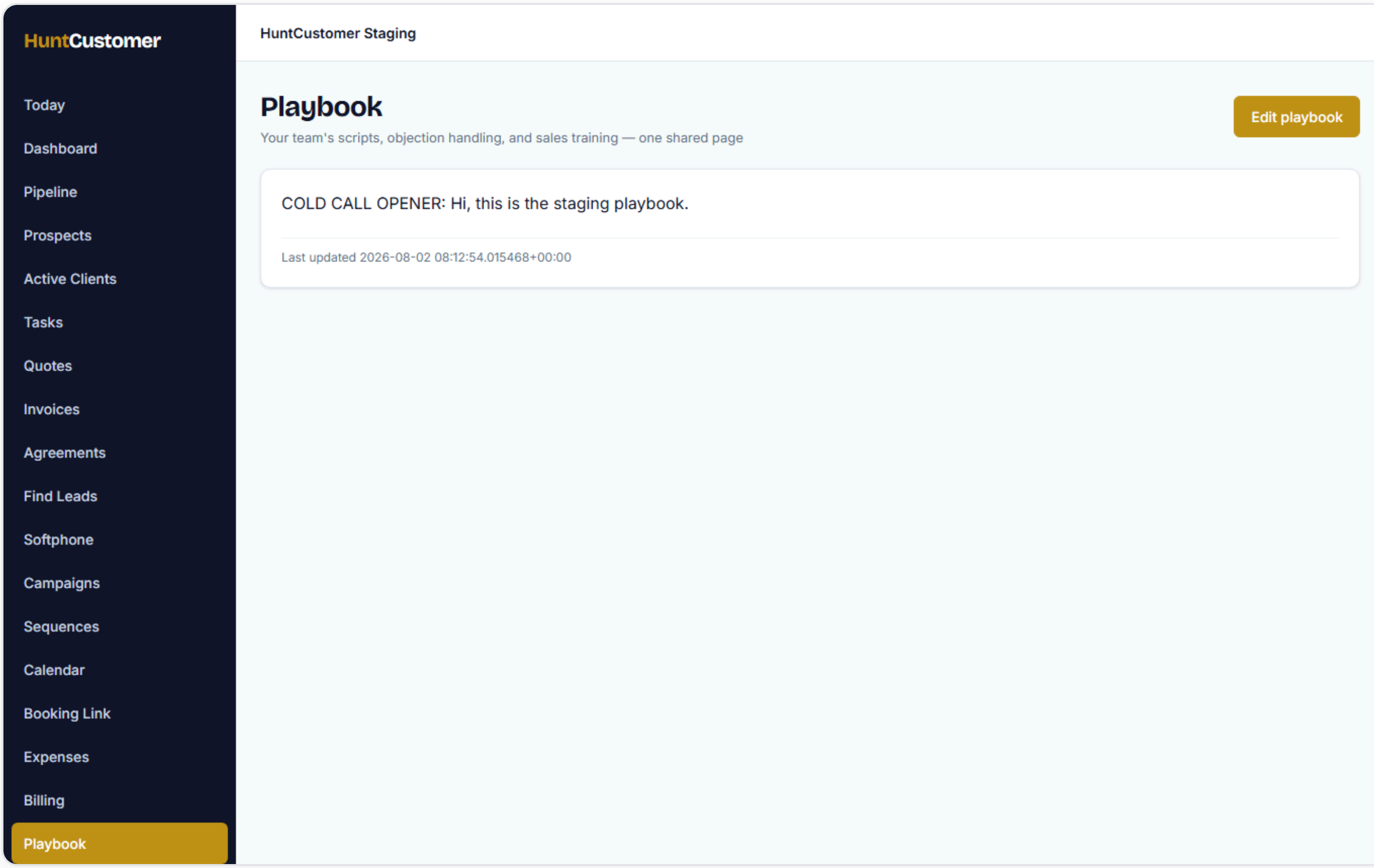
Close the deal in the same tool you hunted it with. Line-item quotes convert to invoices; agreements come out as signable contracts.



1. Build a **quote** from your product catalog (Parameters → Products) — one-time and recurring items, discount and tax handled.
2. Convert to an **invoice** in one click; mark paid when the money lands. Numbering is automatic.
3. Generate an **agreement** with your terms, scope, and pricing — signature blocks included.
4. Every document downloads as a **Word file (.docx)** or prints to PDF, with your company letterhead — and a copy of every generated document is archived on the page forever.

11. The Playbook

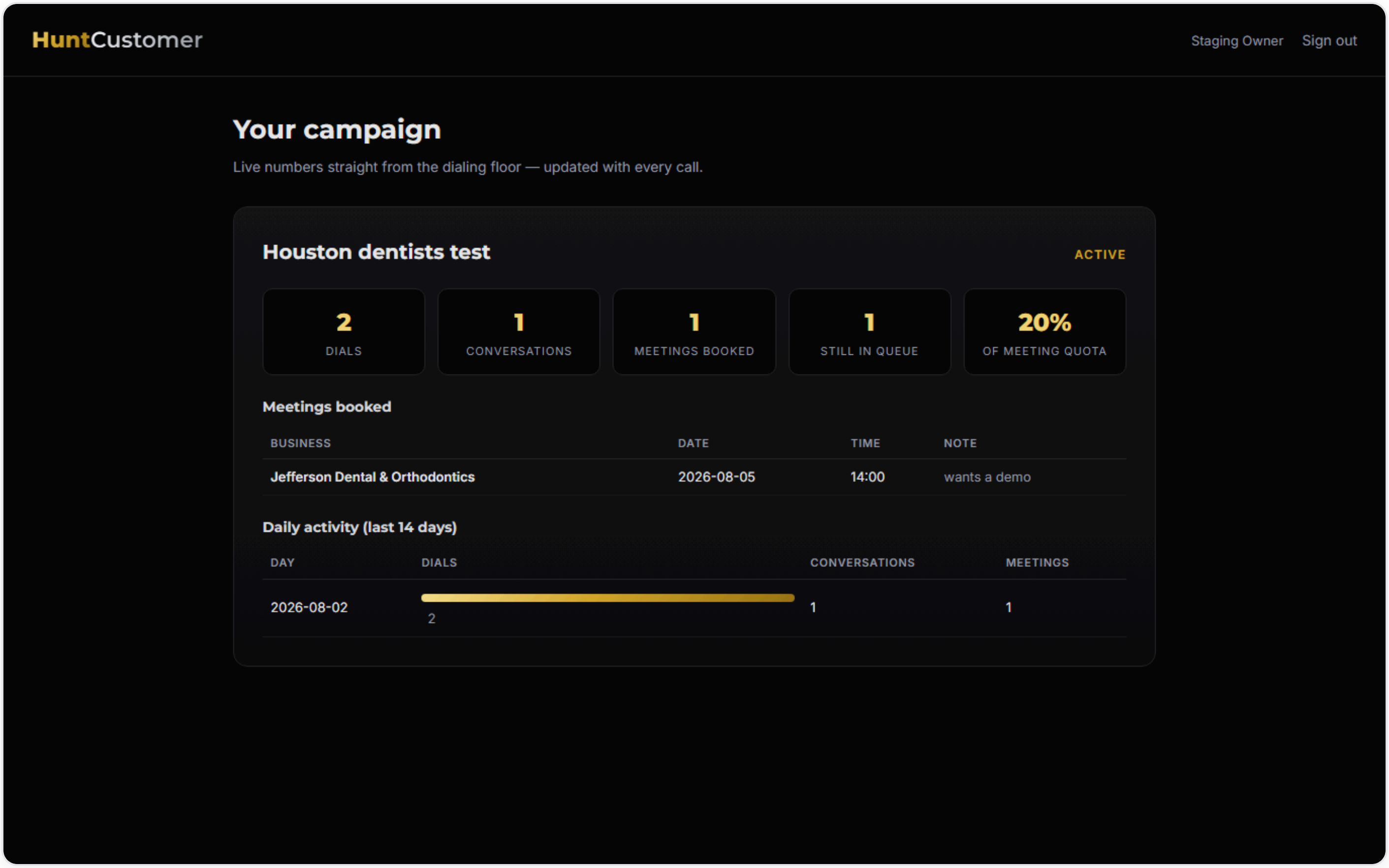
One shared page for your call script, objection answers, and pricing talk tracks — every rep sees the same playbook, always current.



- Owners and admins edit; everyone reads.
- Campaign-specific scripts live on each campaign and appear inside the dialing cockpit — the Playbook is for what's always true.

12. Client portal (for rep-service clients)

Running calling campaigns for a client? Give them a live, read-only dashboard of their campaign — dials, conversations, and meetings, updated with every call.



1. On the campaign page, enter the client's email under **Client portal access** → they get an invite to set a password.
2. When they log in, they see only their campaign's numbers — nothing else in your workspace, ever.
3. Revoke access anytime; use **Preview portal** to see exactly what they see.

> **Questions?** Reach us via the Talk to Sales form at huntcustomer.com — we answer within one business day.