

HuntCustomer

FIND CUSTOMERS. WIN BUSINESS.

User Guide

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

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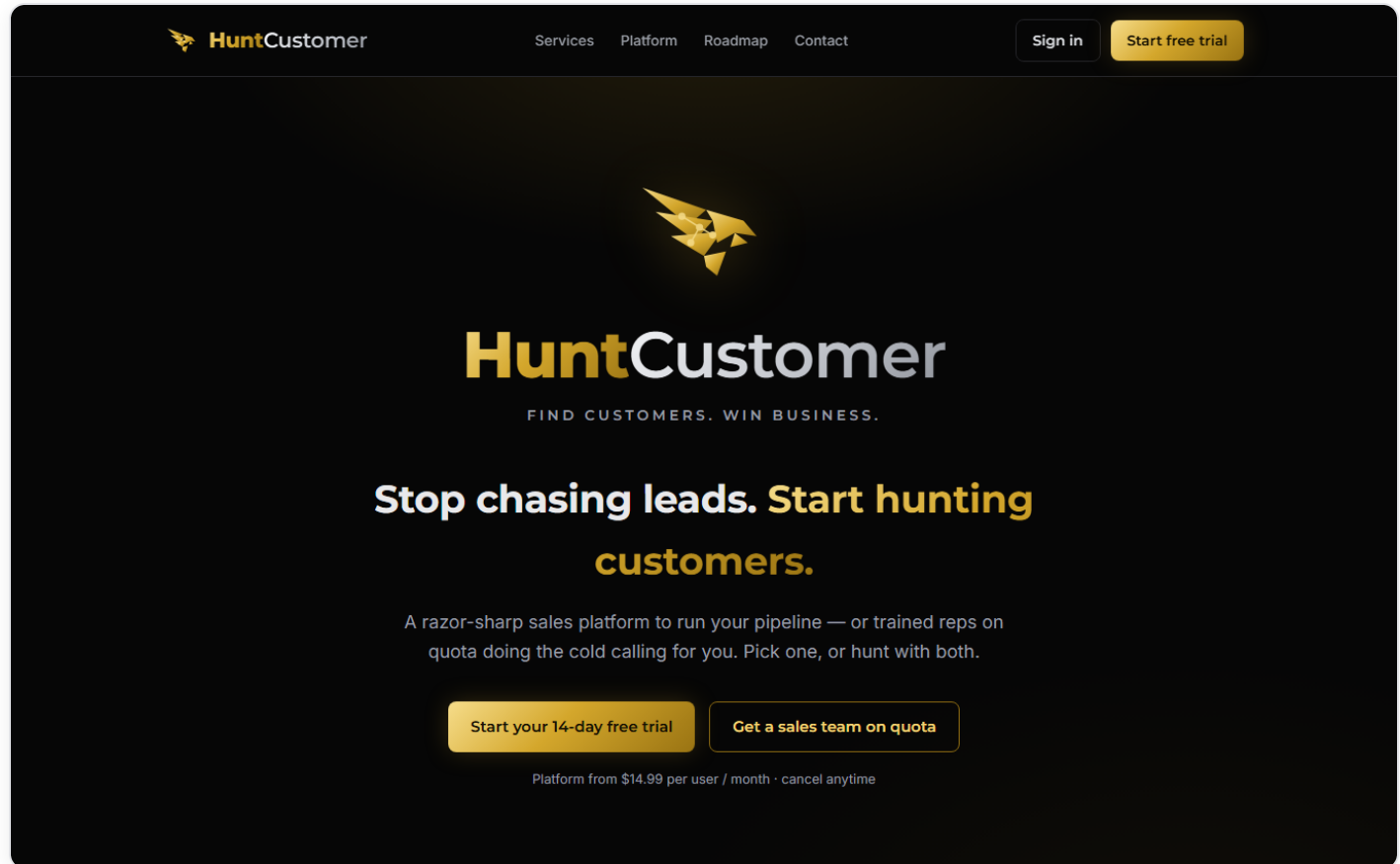
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1. Getting started

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.

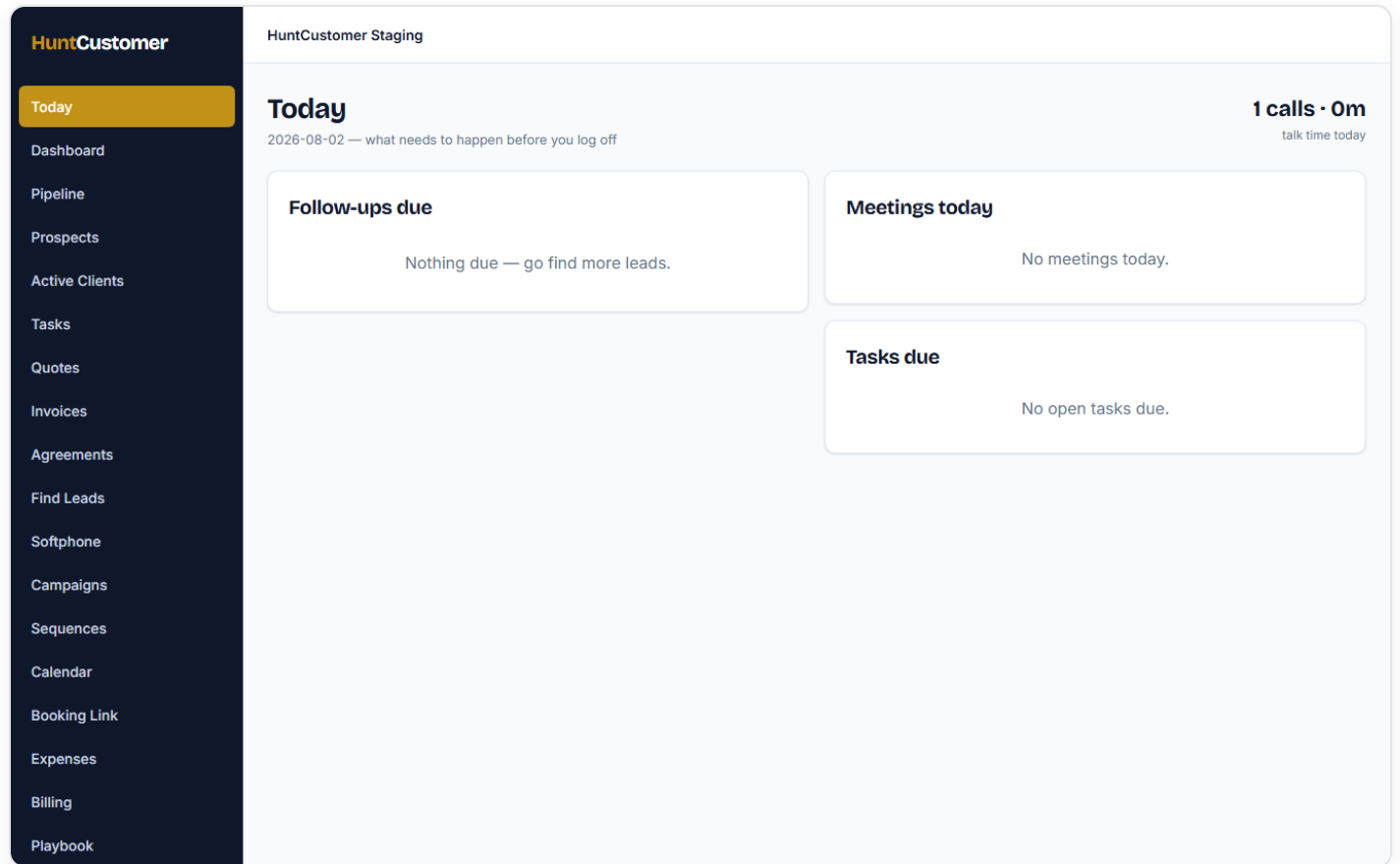


1. Click **Start free trial**, enter your email, workspace (company) name, and a password.
2. Add a card to activate the trial — you won't be charged until day 15, cancel anytime.
3. Under **Parameters** → **Company**, fill in your company name, address, and email — these appear on your quotes, invoices, 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.

The screenshot displays the HuntCustomer Pipeline interface. On the left is a dark sidebar with navigation links: Today, Dashboard, Pipeline (highlighted), Prospects, Active Clients, Tasks, Quotes, Invoices, Agreements, Find Leads, Softphone, Campaigns, Sequences, Calendar, Booking Link, Expenses, Billing, and Playbook. The main area is titled 'HuntCustomer Staging' and 'Pipeline'. A '+ New contact' button is in the top right. Below the title is the instruction 'Drag a card to move a deal between stages.' The pipeline consists of five columns: Lead (2 cards, \$0), Contacted (0 cards, \$0), Qualified (1 card, \$0), Proposal (0 cards, \$0), and Won (0 cards, \$0). Cards are draggable and contain prospect names, values, and owners. For example, 'Booker Test' and 'Family Dental Center Inc' are in the Lead stage, while 'Jefferson Dental & Orthodontics' is in the Qualified stage.

Lead	Contacted	Qualified	Proposal	Won
2 · \$0	0 · \$0	1 · \$0	0 · \$0	0 · \$0
- Booker Test \$0 - Family Dental Center Inc \$0 Staging Owner	—	Jefferson Dental & Orthodontics \$0 Staging Owner	—	—

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

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HuntCustomer Staging

Family Dental Center Inc

EditDelete

Details

StageLead

Emailfrontdesk@familydental.example

Phone(713) 692-2627Call

Address4000 Fulton St D, Houston, TX 77009

Est. value\$0/mo

Assigned toStaging 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

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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.

The screenshot displays the 'Find leads' section of the HuntCustomer Staging application. On the left is a dark sidebar with navigation links: Today, Dashboard, Pipeline, Prospects, Active Clients, Tasks, Quotes, Invoices, Agreements, Find Leads (highlighted), Softphone, Campaigns, Sequences, Calendar, Booking Link, Expenses, Billing, and Playbook. The main content area has a header 'HuntCustomer Staging' and a sub-header 'Find leads' with a '498 credits left' indicator. Below the header is a search form with three input fields: 'Business type' (placeholder: e.g. dentist, roofing contractor, med spa), 'City or ZIP code' (placeholder: e.g. Austin TX or 77002), and 'How many' (dropdown menu set to 20). A 'Search' button is to the right. Below the search form is a 'Credit packs' section with a note: '1 credit = 1 imported lead (name, phone, address). Searching and previewing is always free.' There are three pack options: 'Starter' for \$19 (400 leads at 4.8¢ each), 'Growth' for \$49 (1,200 leads at 4.1¢ each), and 'Scale' for \$99 (3,000 leads at 3.3¢ each). Each pack has a 'Buy' button.

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.

HuntCustomer Staging

Phone numbers

Dedicated calling lines — \$30/month each, 1,000 talk minutes included, then 2.5¢/min

Open softphone

Your numbers

NUMBER	ASSIGNED TO
+18324602880	Anyone (shared) Save

\$30/mo Release

Get a new number

Pick a US area code, choose a number, and it's yours instantly. \$30/month with 1,000 talk minutes included (2.5¢/min after), cancel anytime.

Area code, e.g. 712 Search

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

HuntCustomer

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HuntCustomer Staging

 **Softphone**

Browser calling from your HuntCustomer number · calling as +18324602880

Manage numbers

CALL

+1 (555) 000-0000

— Attach to prospect (optional) —

Connect softphone

Click Connect to start

Recent calls

DATE	NUMBER	PROSPECT	DURATION	REP	AI SUMMARY
Aug 02 07:32	+18324598963	—	—	Staging Owner	—

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.

The screenshot displays the HuntCustomer Staging interface for a campaign named "Houston dentists test" for Test Client LLC. The interface includes a sidebar with navigation options like Today, Dashboard, Pipeline, Prospects, Active Clients, Tasks, Quotes, Invoices, Agreements, Find Leads, Softphone, Campaigns (highlighted), Sequences, Calendar, Booking Link, Expenses, Billing, and Playbook. The main content area shows campaign statistics: 1 In queue, 1 Worked, 2 / 100 Dials, 1 Connects, and 1 / 5 Meetings. It also features a Script section with the text "Hi, this is a staging test script." and a Daily activity table showing 2 dials, 1 conversation, and 1 meeting for the date 2026-08-02. At the bottom, there is a Client portal access section with a form to send a portal invite to a client email.

HuntCustomer Staging

Houston dentists test

for Test Client LLC · Active

▶ Start calling Pause Delete Back

1
In queue

1
Worked

2 / 100
Dials

1
Connects

1 / 5
Meetings

Script
Hi, this is a staging test script.

Daily activity (connect rate 50% · meeting rate 50.0%)

DAY	DIALS	CONVERSATIONS	MEETINGS
2026-08-02	2	1	1

Client portal access
Give the client a read-only live dashboard of this campaign — dials, conversations, and meetings booked. They can't see anything else in your workspace.

Test Client client@testclient.com Revoke

Client email
client@theircompany.com Send portal invite Preview portal

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.

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HuntCustomer Staging

▶ **Houston dentists test**
Power dialer · calling as +18324602880

0 calls this session

Stop for now

Family Dental Center Inc
(713) 692-2627
4000 Fulton St D, Houston, TX 77009
Dentist · Google rating 4.2 · <https://houstonfamilydentalcenter.com/>

Lead
Attempt 2
17:07 local (TX)
open profile ↗

Connect softphone
Connect to start

Outcome

No answer
Callback...
Meeting booked...
Not interested
Bad number
Do not call

Note (lands on the prospect's timeline)
optional — e.g. gatekeeper said call after 2pm

Script
Hi, this is a staging test script.

- The cockpit serves one prospect at a time — details on the left, your script pinned on the right.
- 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**.
- 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.

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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.

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HuntCustomer Staging

 **Do Not Call list**

Numbers here are never dialed — blocked in campaigns and on the softphone

Phone number	Note	
(713) 555-0100	optional — why	Add to DNC

Empty — numbers land here from the  disposition in campaigns, or add one above.

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.

The screenshot shows the 'Lead warm-up' sequence configuration in HuntCustomer. The interface includes a sidebar with navigation options like 'Today', 'Dashboard', 'Pipeline', 'Prospects', 'Active Clients', 'Tasks', 'Quotes', 'Invoices', 'Agreements', 'Find Leads', 'Softphone', 'Campaigns', 'Sequences' (highlighted), 'Calendar', 'Booking Link', 'Expenses', 'Billing', and 'Playbook'. The main content area is titled 'Lead warm-up' and shows 'Auto-enrolls at stage: Lead · Active'. It features a 'Steps' table with two rows: Step 1 (immediately, subject: 'Quick question about {{company}}', body: 'Hi {{first_name}}, this is {{my_name}} from {{my_company}}. Testing step 1.') and Step 2 (+3d, subject: 'Following up, {{first_name}}', body: 'Step 2 body.'). Below the table are input fields for 'Wait (days)' (set to 2) and 'Subject' (set to 'Quick question about {{company}}'). A text area for the 'Body' contains placeholders for personalization. At the bottom, there are filters for 'Enroll prospects: stage' (set to 'Any stage'), 'Name contains' (set to 'optional filter'), and 'Max' (set to '100'), followed by an 'Enroll' button and a note: 'Only prospects with an email; opted-out addresses are skipped.'

#	WAIT	SUBJECT	BODY	
1	immediately	Quick question about {{company}}	Hi {{first_name}}, this is {{my_name}} from {{my_company}}. Testing step 1.	Delete
2	+3d	Following up, {{first_name}}	Step 2 body.	Delete

Wait (days) Subject

Body — placeholders: {{first_name}} {{company}} {{my_name}} {{my_company}}

Hi {{first_name}},
...
{{my_name}}
{{my_company}}

Enroll prospects: stage Name contains Max Only prospects with an email; opted-out addresses are skipped.

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.

The screenshot shows the 'Your booking link' settings page in the HuntCustomer interface. On the left is a dark sidebar with a list of navigation items: Today, Dashboard, Pipeline, Prospects, Active Clients, Tasks, Quotes, Invoices, Agreements, Find Leads, Softphone, Campaigns, Sequences, Calendar, **Booking Link** (highlighted in orange), Expenses, Billing, and Playbook. The main content area has a header 'HuntCustomer Staging' and a title 'Your booking link' with a subtitle 'A public page where anyone can book a meeting straight onto your calendar'. Below the title is a box for sharing the link, showing the URL 'https://staging.huntcustomer.com/book/staging-owner' with 'Copy' and 'Preview' buttons. A 'Settings' section contains three dropdown menus for 'Meeting length' (30 min), 'Day starts' (9:00), and 'Day ends' (17:00). Below these is a 'Your timezone' dropdown set to 'Central'. A checkbox 'Link is active (bookable)' is checked. A 'Save' button is at the bottom of the settings box. A note at the bottom states: 'Slots are Monday–Friday within your hours. Booked meetings land on your calendar, and new bookers are created as prospects automatically.'

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.

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.

HuntCustomer Staging

Invoice INV-2026-0001

Print / Save PDF Download .docx Mark paid Back Delete

Your Company

INVOICE
INV-2026-0001
Issued 2026-08-02
Draft

ITEM	QTY	PRICE	AMOUNT
Lead pack - Growth	1	\$49.00	\$49.00
Phone number (monthly)	2	\$5.00	\$10.00
Subtotal			\$59.00
Total due			\$59.00

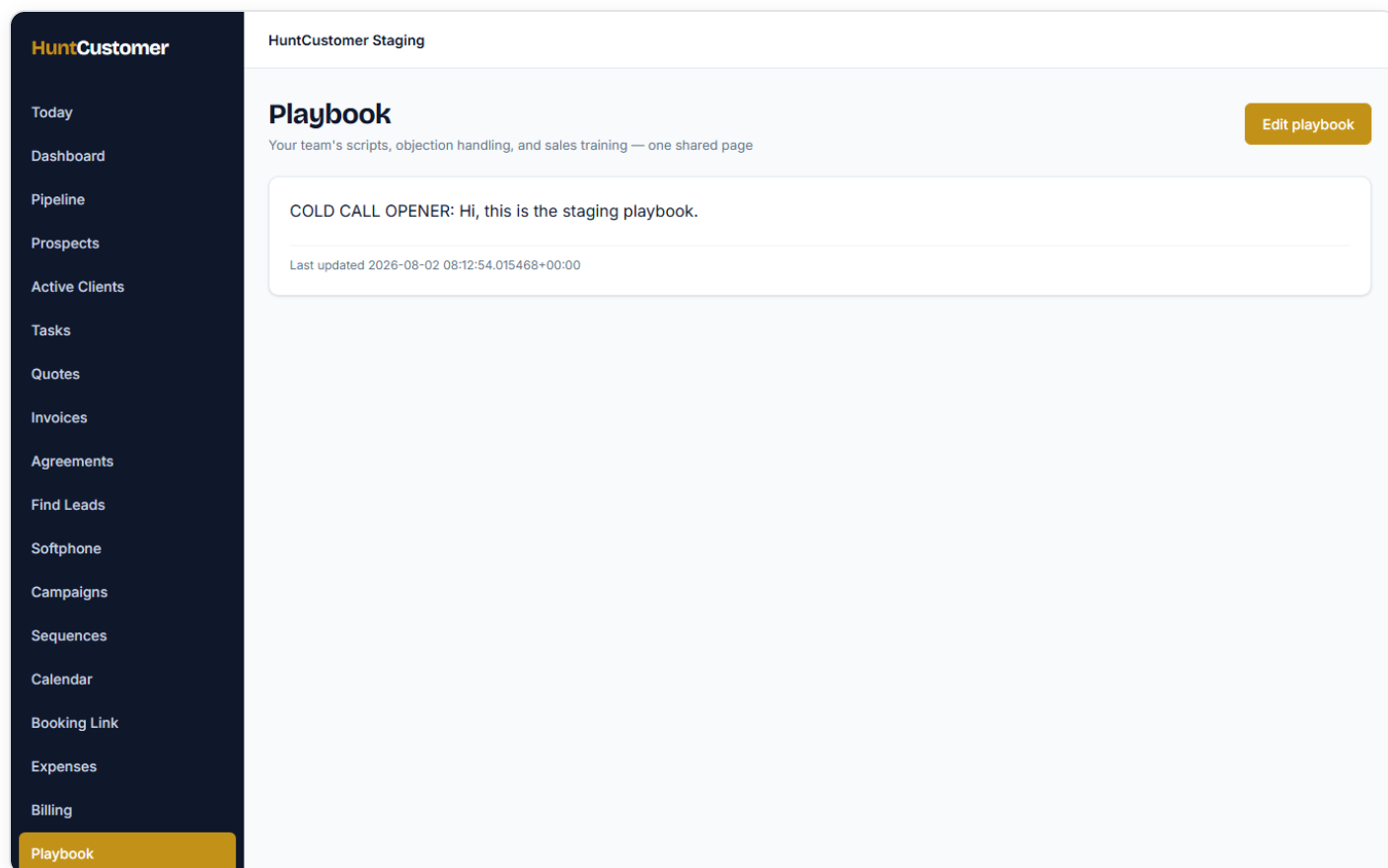
Generated documents

INV-2026-0001.docx	2026-08-02 16:36:09.014419+00:00	36 KB
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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

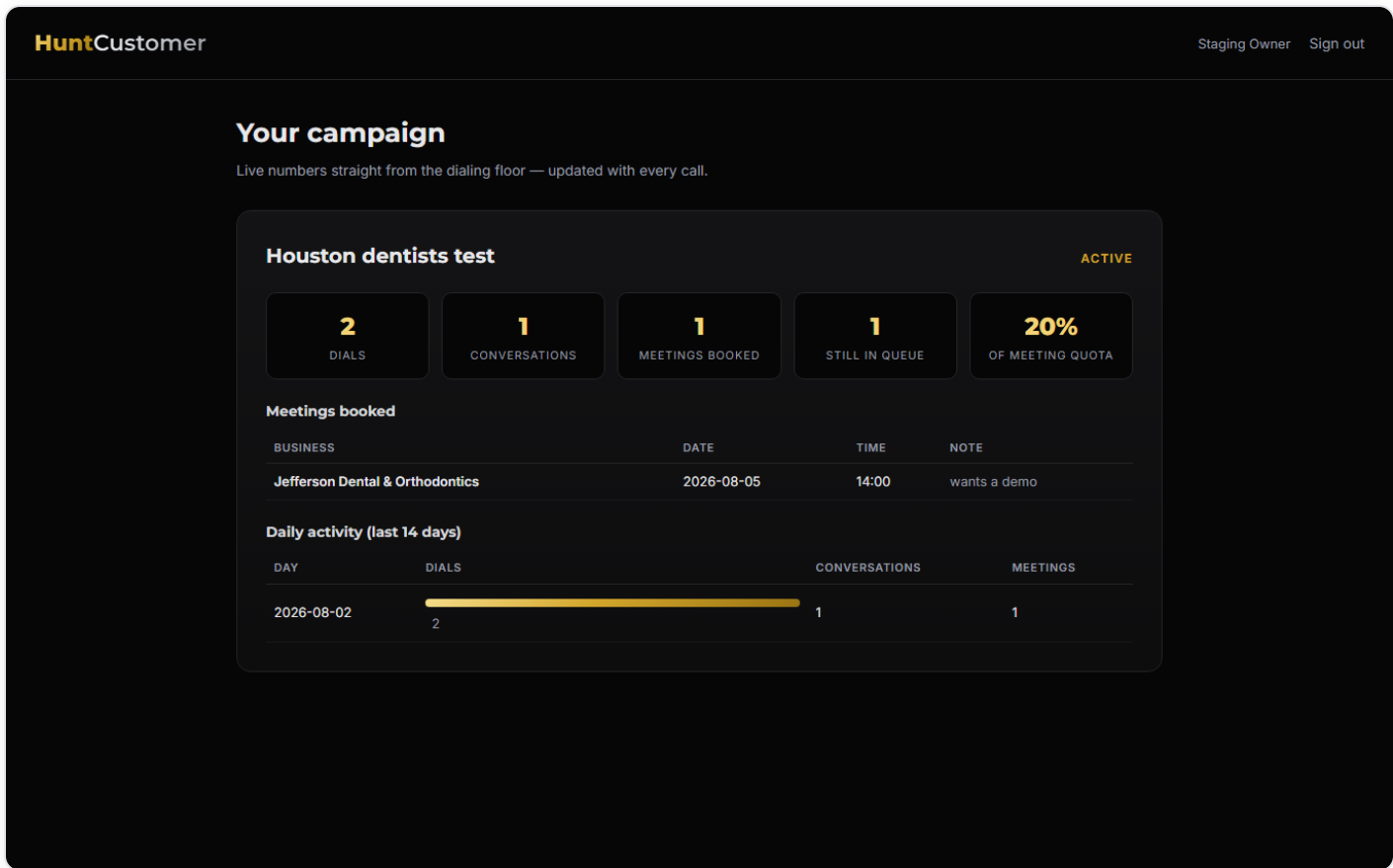
One shared page for your call script, objection answers, and pricing talk tracks — every rep sees the same playbook, always current.



- 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.

