clickpoint® software

Getting Started Guide

Congratulations & Welcome to ClickPoint Software

Mission: We extract more value from customer interactions by improving sales efficiency and performance. We do this by providing a single integrated marketing automation, lead management, and call routing solution.

Henry Alfano
(Chairman)

Gabe Buck
(CEO)

Joel Reynolds
(Director of Technology)

Alex Derkach
(Chief Designer)

Carla Buck
(Billing & Finance)

Mike Sawyer
(Chief Architect)

Jon Kight
(Sr.Software Developer)

Andrew Oliynyk
(Designer)

Max Shevchuk
(Designer)

Michael Lee
(Sr.Software Developer)

Robert Alfano
(Director of QA)

Chris Arenas
(Account Manager)

Norma Hernandez
(QA)

Sam Sanchez
(Account Manager)

Heath Warren
(Account Manager)

Nathan Watkins
(Project Manager)

Francisco Zavala
(Consultant)

MEET YOUR TEAM

CALL **1-866-372-9431**

SUPPORT TEAM

Nathan Watkins

Chris Arenas

Sam Sanchez

Heath Warren

SupportTeam@clickpointsoftware.com

BILLING AND FINANCE

Carla Buck

CUSTOM DEVELOPMENT

Joel Reynolds

Mike Sawyer

Michael Lee

Jon Kight

Francisco Zavala

Or you can download 4.0 by visiting www.clickpointsoftware.com/install

Tickets can be placed by sending an email to SupportTeam@clickpointsoftware.com

- LeadExec Product Letter
- Lead Distribution Buyer Guide
- Buy vs. Build (LeadCon 2012)
- Whitepaper: Lead Generation 101
- Whitepaper: Banner – Affiliate
- Whitepaper: CPC
- Whitepaper: Email
- Whitepaper: SEO
- Whitepaper: Landing Page
- Whitepaper: TV - Radio

BASIC SETUP

- ✓ Create a lead type
- ✓ Create your lead source
- ✓ Create your lead campaigns
- ✓ Generate posting instructions
- ✓ Set up clients
- ✓ Set up client lead delivery
- ✓ Set up client delivery options
- ✓ Importing leads
- ✓ Configure client portal
- ✓ Configure vendor portal

INTERMEDIATE

- ✓ Set up logos and custom tabs
- ✓ Customize client portal
- ✓ Set up merchant account for lead orders
- ✓ Set up lead grading
- ✓ Set up email notifications
- ✓ Set up live call transfer solution
- ✓ Set up call routing
- ✓ Set up client grouping
- ✓ Set up user permissions

ADVANCED

- ✓ Set up custom lead delivery (evaluate functions)
- ✓ Set up Ping and Post Delivery
- ✓ Set up double opt-in solution
- ✓ Set up TheOfferMachine.com
- ✓ Set up advanced reporting (Pivot Grids)
- ✓ Set up quality control dialer
- ✓ Set up distribution lists
- ✓ Set up analytics

TASK	WHERE IS IT LOCATED IN LEADEXEC?	JUMP TO DOCUMENTATION
CREATE A LEAD TYPE	SETTINGS > LEAD TYPES > ADD NEW	Read Article →
CREATE YOUR LEAD SOURCES	LEAD SOURCES > ADD NEW	Read Article →
CREATE YOUR CAMPAIGNS	LEAD SOURCES > NAME OF LEAD SOURCE > CAMPAIGNS > ADD NEW	Read Article →
SET UP CLIENTS	CLIENTS > ADD NEW	Read Article →
SET UP EMAIL AND EDIT EMAIL TO LEAD	CLIENTS > DELIVERY METHODS	Read Article →
IMPORTING LEADS	LEAD SOURCES > IMPORT LEADS	Read Article →
SET UP PING AND POST DELIVERY	CLIENTS > DELIVERY METHODS	Read Article →
SET UP CLIENT PORTAL	WWW.LEAD-BACKOFFICE.COM	Read Article →
SET UP VENDOR PORTAL	WWW.SECURE-LEADPORTAL.COM	Read Article →

TAKS	WHERE IS IT LOCATED IN LEADEXEC?	JUMP TO DOCUMENTATION
SET UP USER PERMISSONS	SETTINGS > PERMISSIONS	Read Article →
SET UP QUALITY CONTROL DIALER	LEADS > QUALITY CONTROL	Read Article →
SET UP CLIENT PORTAL CREDENTIALS	CLIENTS > OPEN CLIENT > PORTAL OPTIONS	Read Article →
CUSTOMIZING YOUR CLIENT PORTAL	SETTINGS > WEB PORTAL	Read Article →
SET UP CLIENT DELIVERY OPTIONS	SETTINGS > DISTRIBUTION OPTIONS	Read Article →
SET UP MERCHANT ACCOUNTS	SETTINGS > BILLING	Read Article →
SET UP LOGOS AND CUSTOM TABS	SETTINGS > GENERAL PREFERENCES	Read Article →
SET UP ADVANCE REPORTING (PIVOT GRIDS)	LEADS >MAXIMIZE/SEARCH LEADS/CLIENT DISTRIBUTION	Read Article →

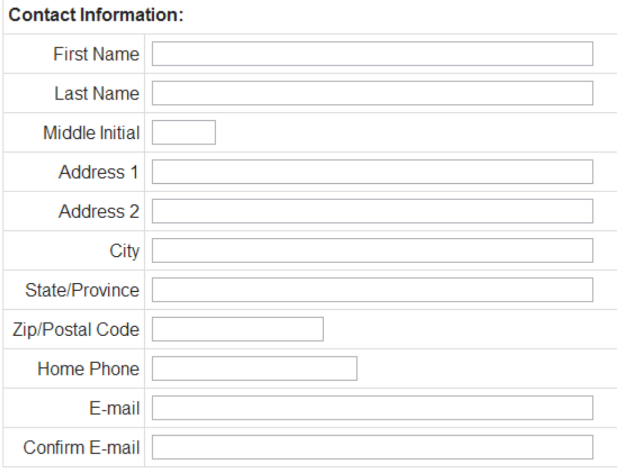
TASK	WHERE IS IT LOCATED IN LEADEXEC?	JUMP TO DOCUMENTATION
SET UP LEAD GRADING	SETTINGS > LEAD GRADING	Read Article →
SET UP ANALYTICS	SETTINGS > ANALYTICS	Read Article →
SET UP CALL ROUTING	LEADSOURCES > CAMPAINGS > IVR NUMBERS AND SCRIPTS	Read Article →
SET UP QUALITY CONTROL DIALER	LEADS > QUALITY CONTROL	Read Article →
SET UP LIVE CALL TRANSFERS	LEAD SOURCES > CAMPAIGNS > GENERIC FORMS	Read Article →
SET UP DOUBLE OPT IN	SETTINGS > LEAD VERIFICATION	Read Article →
SET UP CLIENT GROUPING	CLIENTS > CLIENT GROUPS	Read Article →
SET UP DISTRIBUTION LISTS	SETTINGS > DISTRIBUTION LISTS	Read Article →

What is your Lead Type?

Your Lead Type is the heart of your LeadExec account

Why is this important?

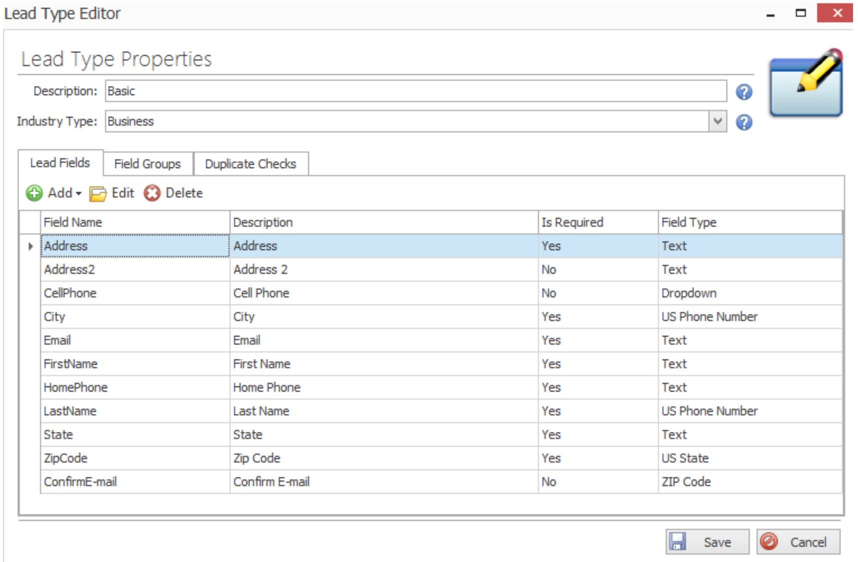
- Your lead type is the fields that you wish to capture from your lead forms or lead sources.
- Your lead type allows you to control the fields you are wanting tracked and sent to your clients using the LeadExec platform.
- Within LeadExec you are able to control the following:
  - Formatting
  - Invalid Characters
  - Dropdown Values
  - Default Values if Blank
- LeadExec allows you to control the above by giving you the option to choose from many different data types when creating your lead type.



Contact Information:

First Name
Last Name
Middle Initial
Address 1
Address 2
City
State/Province
Zip/Postal Code
Home Phone
E-mail
Confirm E-mail

Figure 1: Image depicting a lead form.



Field Name	Description	Is Required	Field Type
Address	Address	Yes	Text
Address2	Address 2	No	Text
CellPhone	Cell Phone	No	Dropdown
City	City	Yes	US Phone Number
Email	Email	Yes	Text
FirstName	First Name	Yes	Text
HomePhone	Home Phone	Yes	Text
LastName	Last Name	Yes	US Phone Number
State	State	Yes	Text
ZipCode	Zip Code	Yes	US State
ConfirmE-mail	Confirm E-mail	No	ZIP Code

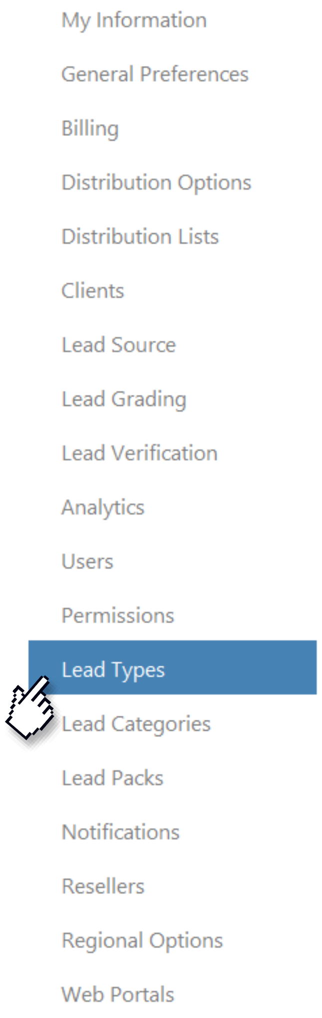
Figure 2: Image depicting an example lead type.

Creating your Lead Type

Setting up your Lead Type

→**Step 1:** Navigate to the Lead Type List by clicking the *Settings* link at the top, and clicking the ***Lead Types*** option that will appear on the left side.
(Illustrated in **Figure 1**)

→**Step 2:** Once you are in the Lead Types section, Click on ***New*** in the Lead Types Setup window.
(Illustrated in **Figure 2**)



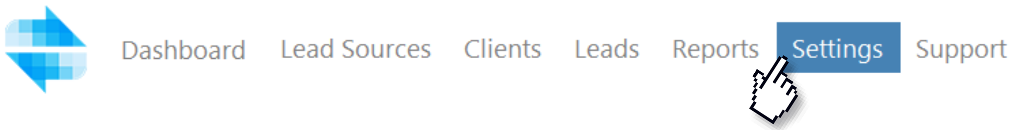


Figure 3: Image depicting how to get to the **Settings** section.

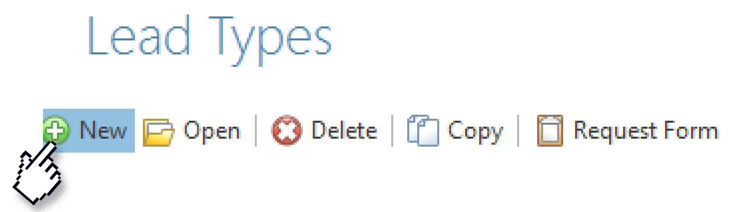


Figure 4: Depicting how to get to the Lead Type setup wizard.

Creating your Lead Type

→ Step 3: From here you are able to choose from one of our many preset lead types or create a custom one. Once you have made your selection click *Next* (Illustrated in Figure 3).

→ Step 4: Give the Lead Type a description that will allow you to know what lead type this is. Set the Industry type if applicable. Once you have these set you can move forward with adding fields to your lead type.

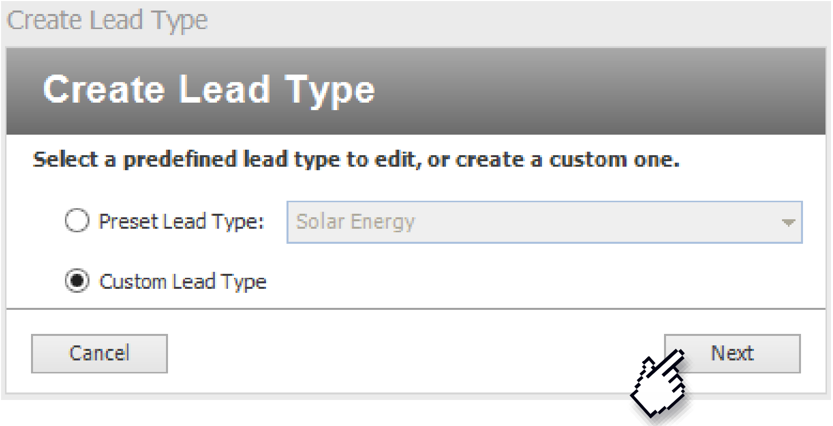
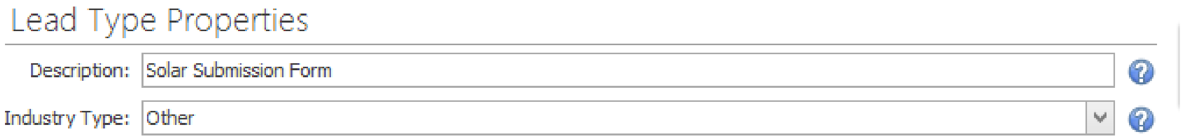


Figure 5: Image displaying how to start the Lead Type creation.



Creating your Lead Type

Adding a field to your lead type

→ **Step 1:** To start adding fields to your lead type, click the ***Add*** button. This will bring up a dropdown with the different data types available for each field. (Illustrated in **Figure 4**)

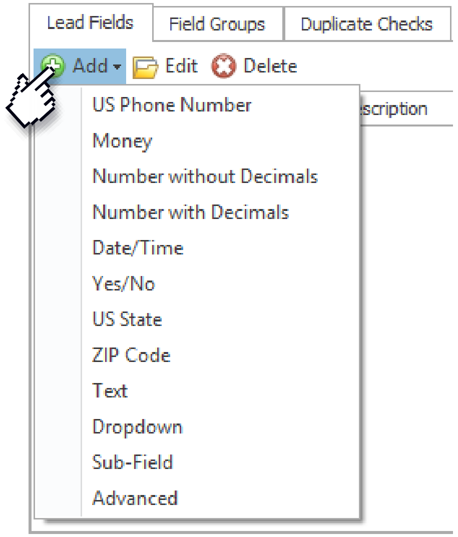


Figure 6: Image displaying how to start adding a lead field

→ Data Types:

- US Phone Number
  A preformatted field set to look for a 10 digit number and display it in a (000) 000-0000 format.
- Money
  A preformatted field set to capture and display fields in a currency format.
- Number with Decimals
  A preformatted field set to accept only numbers with 1 decimal point.
- Number without Decimals
  A preformatted field set to accept only numbers and no additional characters.
- Date/Time
  A preformatted field set to capture and display information in .NET date/time formatting.
- Yes/No
  A preset field set to accept either Yes or No.
- US State
  A preset field set to accept only a certain list of custom values.
- Zip Code
  A preformatted field set to accept 5 numbers and display them accordingly.
- Text
  A format free field set to accept any values entered.
- Dropdown
  A customizable set value list.
- Sub-Field
  Sub-fields allow for multiple fields to be created under a single field, such as multiple policies under drivers.
- Advanced
  Allows you to control every option on the fields. Allowing you to control data types as well as formatting.

Creating your Lead Type

→ **Step 2:** Once you select the best data type for the field you want to add, you will be put into a lead field editor. From here you are going to give the field a description which is what will display inside of LeadExec.

→ **Step 3:** Fill out the field name. The field name is going to be the field that your lead source or landing page will be posting into. This field name is not allowed to have any spaces or special characters other than "_" or "-".

→ **Step4:** You are able to set a default value on this field. Once that information is input, setting a default value will cause the value to appear only if the field receives a lead with a blank value.

→ **Step 5:** Select the System Field that best fits the field you are adding. This will allow the system to use its many validation and display options.

→ **Step 6:** Select whether the lead field is going to be required or not.

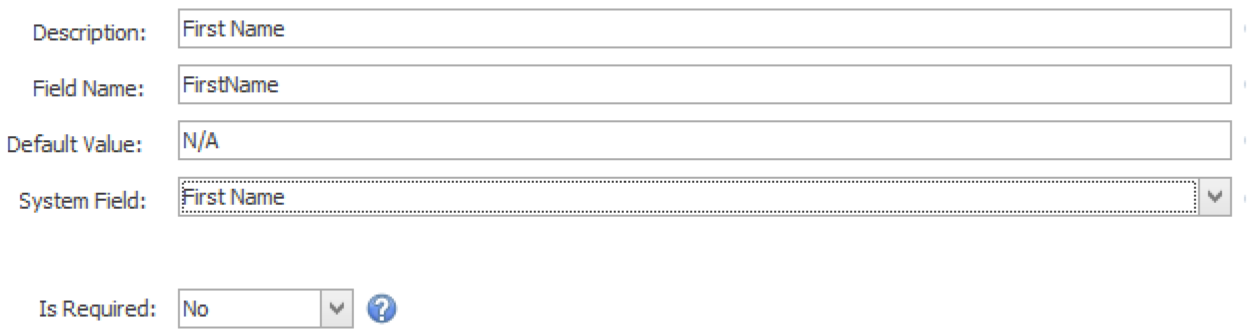


Figure 7: Image displaying the starting set up for a field.

Creating your Lead Type

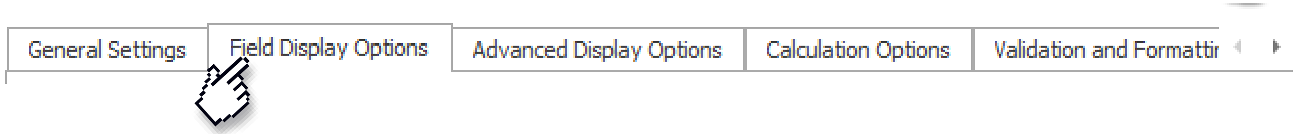


Figure 8: Image displaying how to get to the Field Display Options.

→ Step 7: Select the *Field Display Options* to move on to the next section. This section will allow you to dictate where this field is displayed *(shown in figure 8)*.

→ Step 8: Click *Add t*o create a new display option. The display text will appear on all of your reporting screens and the order will dictate where this field will appear when looking at the lead details.

→ Step 9: Click *OK* once you have selected the areas inside of the system where you want the information displayed.

→ Step 10: Select the system field that best fits the field you are adding. This will allow the system to use its many validation and display options.

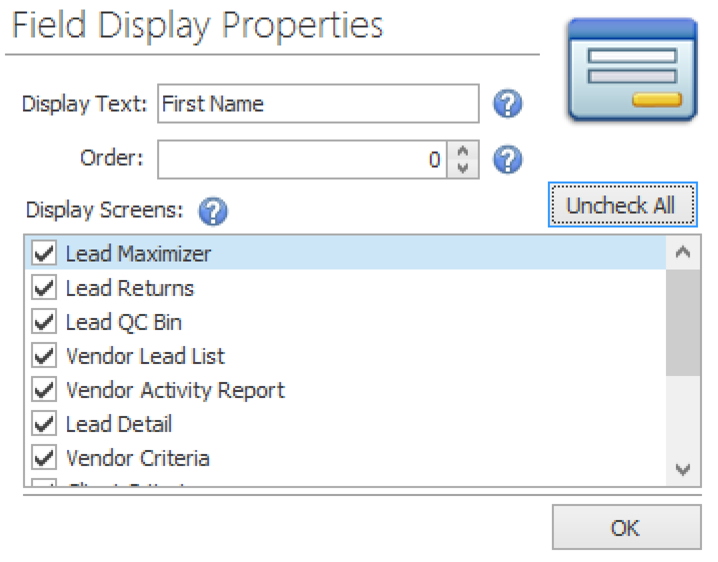


Figure 9: Image displaying an example of a display option allowing leads to appear everywhere in the system.

Creating your Lead Type

Optional Steps

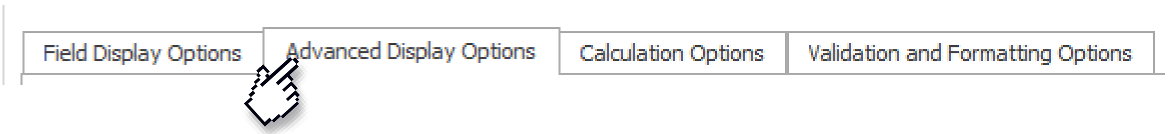


Figure 10: Image displaying how to customize the Advanced Display Options.

→ Step 11: Select the *Advanced Display Options.* This section will allow you to customize the display size for this field. By default the field will wrap around the value on the lead.(seen in figure 10.)

→ Step 12: Select the *Calculation Options*, this will allow the system to use an expression to create a field whose value is calculated based on the value of other fields.

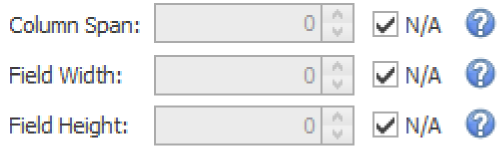


Figure 11: Image displaying the field display parameters set by default on the lead.

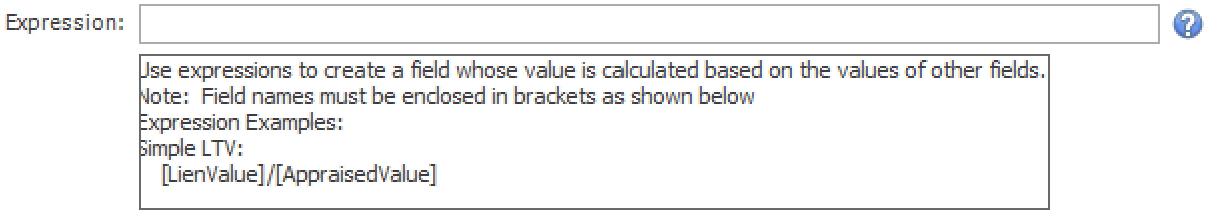


Figure 12: Image displaying calculation options.

Creating your Lead Type

Optional Steps

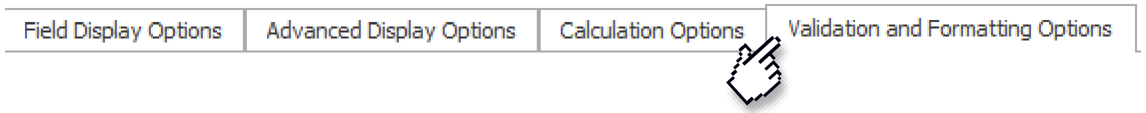


Figure 13: Image displaying how to get to the *Validation and Formatting Options*.

→ Step 13: Select the V*alidation and Formatting Options* tab. This will allow you to enter in the validation, profanity and formatting options for this lead field *(shown in figure 13)*.

→ Step 14: On the right side of the screen you will be able to select from a dropdown list of preloaded validation, invalid character and formatting options *(shown in figure 14)* .

→ Step 15: Click *OK* once you have your formatting and validations options set.

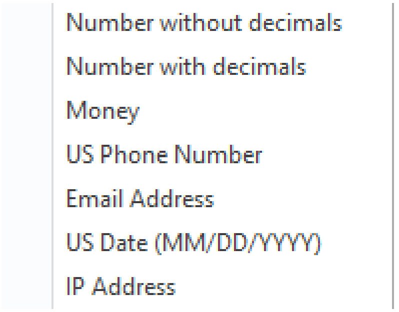


Figure 14: Image displaying preloaded validation options.

You have now completed the steps to add a lead field into your lead type. You may repeat this process for any and all fields that are to be added to your lead type.

Setting up Field Groups

Setting up your Lead Type

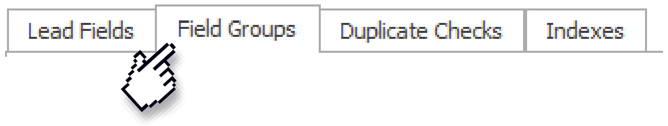


Figure 1: Image displaying how to get to the *Field Groups* tab.

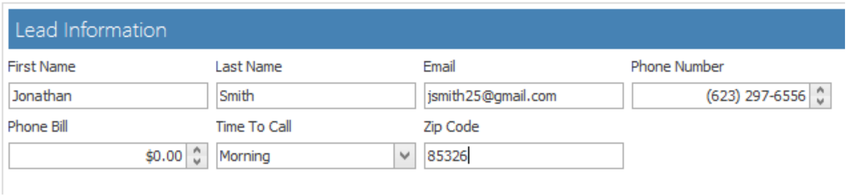


Figure 2: Image displaying what a field group will look like when viewing a lead.

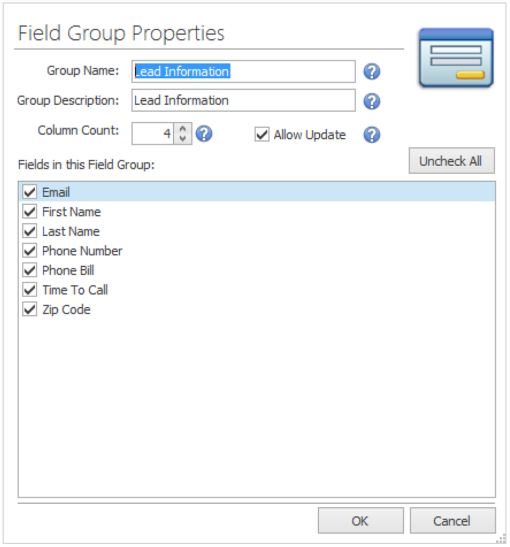


Figure 3: Image displaying the *Field Group Properties* with the fields selected for the group.

→ Step 1: Select the *Field Groups* tab. Within this section you will be able to group the lead fields into separate sections in the lead details *(illustrated in figure 1)*.

→ Step 2: Click on *Add.* This will bring up the grouping window allowing you to enter in a group name and then the group description. The description will be what is shown when looking at the lead information *(illustrated in figure 2)*. Simply check the fields you want added to the group *(illustrated in figure 3)*. Once you have done this click OK.

Setting up Duplicate Checks

Setting up your Lead Type

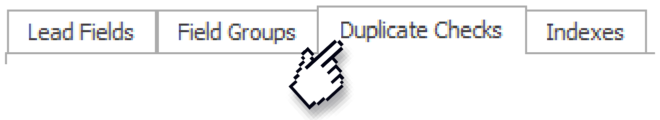


Figure 1: Image displaying how to get to the *Duplicate Checks* tab.

→ **Step 1:** Select the *Duplicate Checks* tab. This section will allow you to tell LeadExec what fields to use when running its duplicate checking.(illustrated in figure 1).

→ **Step 2:** Click *Add*. This will bring up the *Duplicate Checks* window.

From here simply select the fields you wish to have LeadExec use as your Duplicate filters *(illustrated in in figure 2)* and click *OK*.

→ **Step 3:** Click *Save* once you have finished these steps, your Lead Type is now complete.

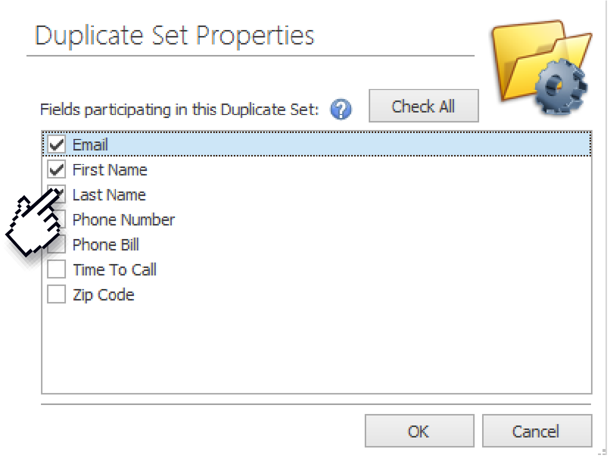


Figure 2: Image displaying what a field group will look like when viewing a lead.

F.A.Q.

→ Q. What are the benefits of using Duplicate Checks?
  → A. Using the duplicate check functionality ensures that leads that come in are unique. This will ensure that the leads you send to your clients are not leads you have had in your system before; increasing the chances for selling the lead.

→ Q. What happens to a lead that fails the Duplicate Check?
  →A. By default a lead that fails the Duplicate Check is rejected completely out of the system.

→ Q. Once this is set up am I good to start receiving leads?
  → A. No, you are still required to follow the steps to create a lead source and campaign before you can receive leads into this lead type.!

→ Q. What if the values on my dropdowns are not what my clients want?
  → A. You are able to custom map values for your clients in the clients delivery method. On your lead type you would set up the values you are wanting to receive.

→ Q. What happens if a lead comes in with a blank required field?
  → A. A lead that comes in with a blank required field will be rejected out of the system with an error stating that the field that is missing is required.

Creating your Lead Source

Figure 1: Image depicting how to get to the Lead Source List.

→ Step 1: Navigate to the Lead Source List by clicking the *Lead Sources* link at the top, and clicking the *List* option that will appear on the left side.
(Illustrated in Figure 1)

→Step 2: Once you are in the *"Lead Source List"*. Click *Create New* to get to the Lead Source setup page.
(Illustrated in Figure 2)

Figure 2: Depicting how to get to the Lead Source setup page.

Creating your Lead Source

→ **Step 3:** Input the Lead Sources name located at the top left of the screen. (Illustrated in **Figure 3**)

→ **Step 4:** Fill out the rest of the Lead Sources contact information and click ***Next*** to save your information.

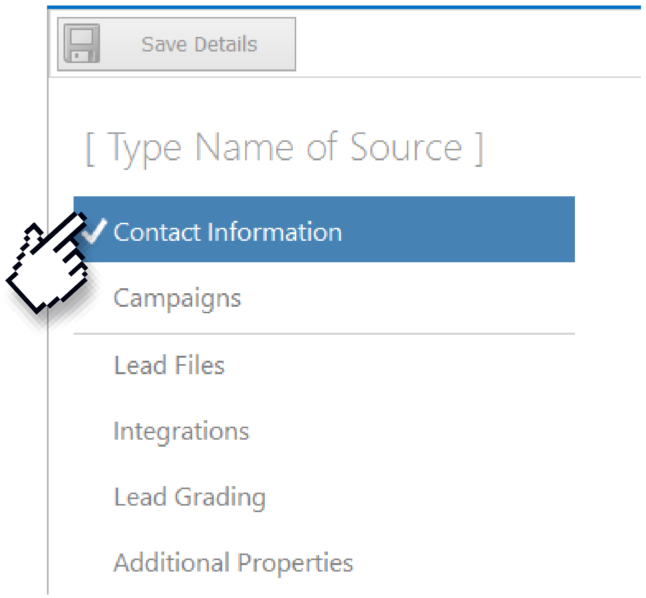
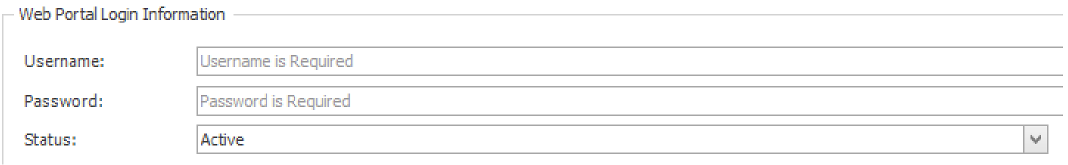


Figure 3: Image displaying how to disable users.

Information Requirements:

→ *Username*

→ *Password*



F.A.Q.

- Q. What is the URL for the Vendor Portal?
  - A. www.secure-leadportal.com
- Q. Once I set up this Lead Source am I good to start receiving leads?
  - A. No you will still need to follow the steps listed under the Creating a Campaign walkthrough in order to receive leads.
- Q. What information is required in order for me to set up a Lead Source??
  - A. The only required information to set up a lead source is the Company Name at the top left and the username and password for the vendor portal located in the Web Portal Login Information section.
- Q. What is the Vendor Portal?
  - A. The vendor portal gives your lead source the ability to log into a web portal to view any and all leads they have submitted through this lead source. This allows them to keep an accurate number of how many leads have been posted into the system and how many have been rejected.
- Q. Can I import leads into the Lead Source I just created?
  - A. Yes, once you have completed the Campaign setup process you are able to import leads directly into this lead source by selecting Lead Files > Upload File. Once you have completed this step you can then start the file mapping utility which will attempt to map the fields on your file to the fields in LeadExec. If it is not able to map some of the fields it will ask you to manually map those. Once you have finished this, leads will start uploading into your account!

Creating a Campaign

→ **Step 1:** Enter the Lead Source that this Campaign will be tied to. To do this go to **Lead Sources** then click ***List***. Open the lead source by selecting it and clicking ***Open***. (Illustrated in **Figure 1**)

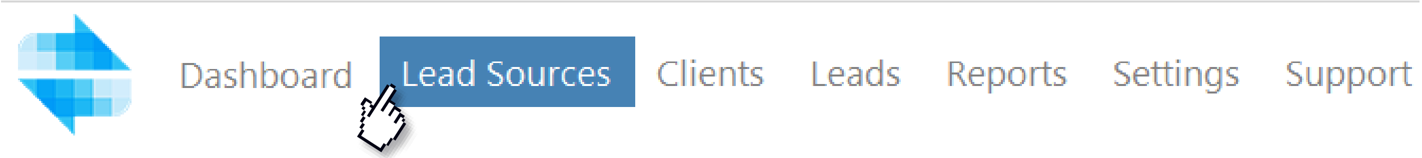


Figure 1: Image depicting how to get to the Lead Source List.

→ **Step 2:** This will bring you into the lead source itself. Select the ***Campaigns*** section on the left side and click ***New***. (Illustrated in **Figure 2**)

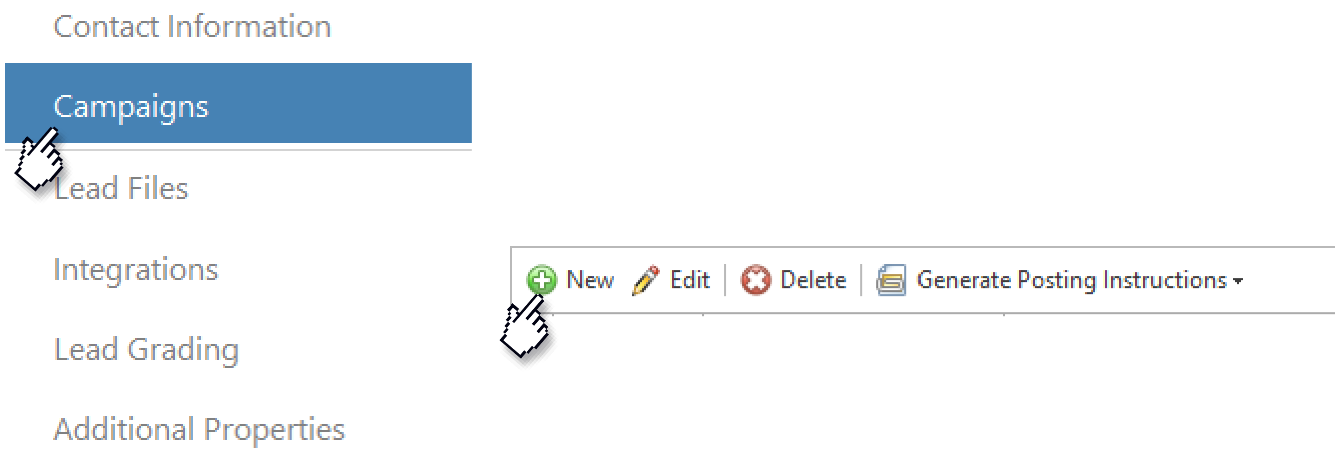


Figure 2: Depicting how to get to Campaign Section.

Creating a Campaign

→ **Step 3:** Click ***Next*** to move to **General Information**. Give the Campaign a name that will allow you to know which lead type and campaign this lead is coming from. (Illustrated in **Figure 3**)

→ **Step 4:** Make sure the status is set to **Active.** Any other status will not allow leads to enter the system through this campaign.

→ **Step 5:** Input the cost per lead for this campaign. This cost will be tracked throughout the system to allow you to run the most accurate Reports.

→ **Step 6:** Setting the Default User Assignment will allow any leads that come through this campaign to be assigned directly to a user inside of your system.

→ **Step 7:** Click ***Next*** to move to the Quantity Limit section.

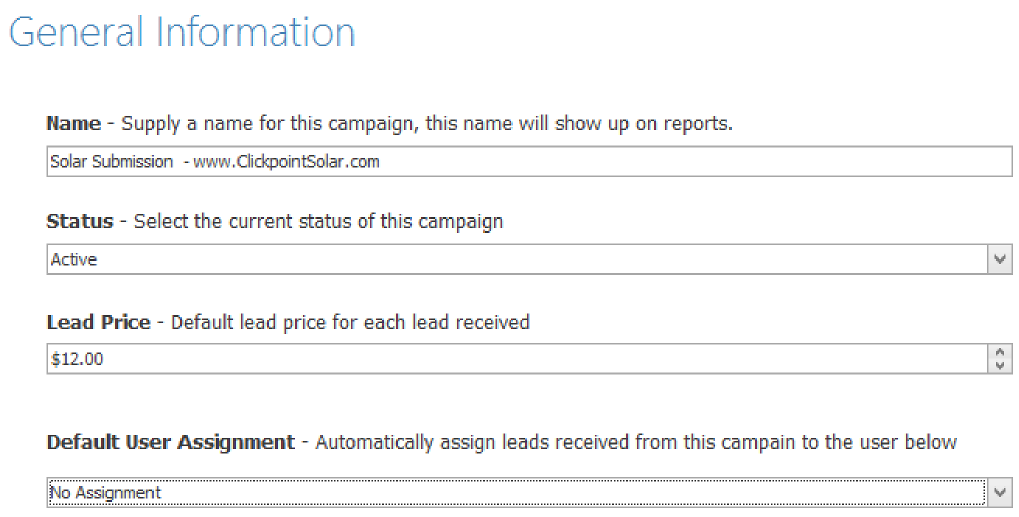


Figure 3: Image displaying a completed General Information Section.

Creating a Campaign

Within the Quantity Limits section you are able to limit the amount of leads that can enter your system through this campaign, as well as the amount of times a single lead can be sent out to clients.

→ Step 8: Input the limits for this campaign. Input the Hourly, Daily,and Monthly limits. You can also input the maximum amount of times that a single lead can deliver out through this campaign by setting the value under the Maximum Delivery Count.

→ Step 9 : Click *Next* to save your information and move forward to the Lead Type Information .

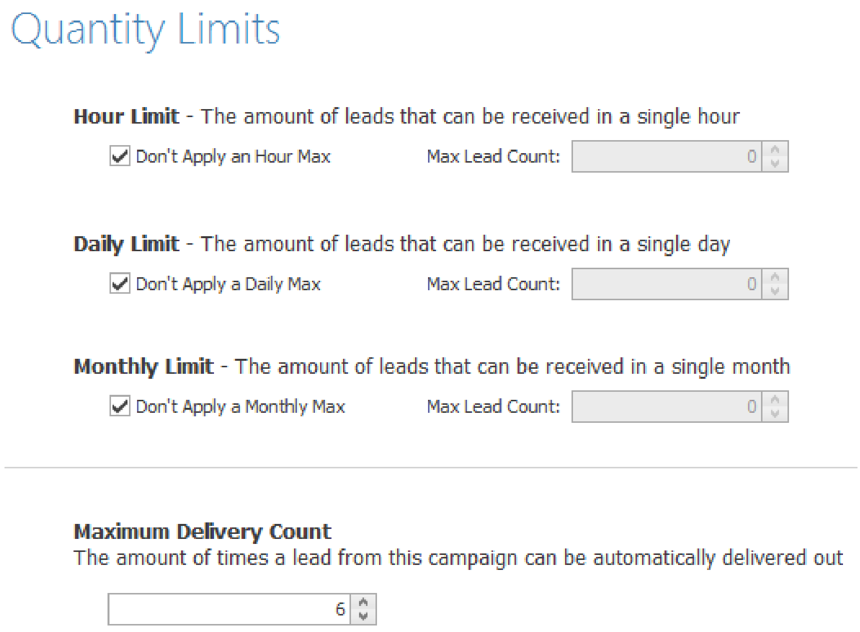


Figure 4: Image displaying the Quantity Limits section

Creating a Campaign

Within the Lead Type Information section you are able to set the types of leads that will be coming through this campaign as well as how far back the system will look back to check for a duplicate.

→ Step 10: Select the appropriate lead type that this campaign will be receiving leads for.
(Illustrated in Figure 5)

→ Step 11: Set whether or not you want the system to include rejects on its duplicate checks.

→ Step 12: Set the number of days you want leads coming through this campaign to be checked for duplicates.

→ Step 13: *(optional)* Check Append City and State if you would like LeadExec to attempt to place the lead within a city and state off of the zip code and country that the lead comes in with.

→ Step 14: Click *Next* to move forward into the Quality Options section.

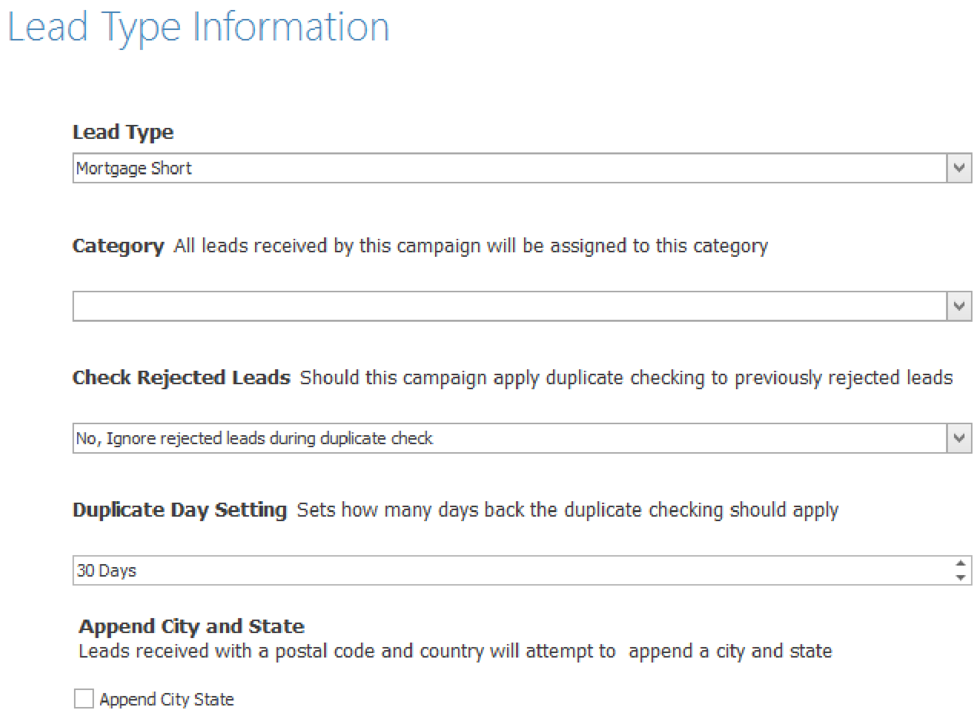


Figure 5: Image displaying the Lead Type Information section.

Creating a Campaign

Within the Quality Options you are given the ability to customize the flow that your leads will follow. You are able to set whether leads go directly to clients or to your Quality Control bin for manual validation as well as have the system reject leads that your clients will not accept.

→ **Step 15:** If you want leads to go directly to the Quality Control bin for manual validation, set the "Use Quality Control bin" to "Yes, Automatically move all leads into Quality Control." If you want your leads to go directly to clients as they come in set the option to "No, Do not use the Quality Control bin, Move the lead to delivery." (Illustrated in Figure 6)

→ **Step 16:** You are able to change the route that rejected leads take when they attempt to enter your system by changing the *Default Reject Action* options. Your options are:

→ Reject Back to Source – This is the system default this will take any rejected lead and mark it as one inside of LeadExec.

→ Move to Quality Control – This will take any rejected lead and move it directly to Quality Control for manual validation.

→ Forward to Delivery – This will take any rejected lead and move it directly into automation for your clients to receive.

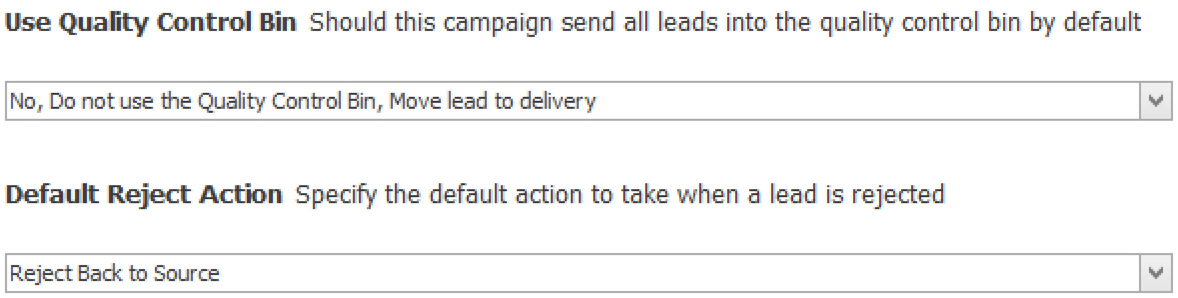


Figure 6: Image displaying the Use Quality Control Bin and the Default Reject Action options.

Creating a Campaign

Within the Quality Options you are given the ability to customize the flow that your leads will follow. You are able to set whether leads go directly to clients or to your Quality Control bin for manual validation as well as have the system reject leads that your clients will not accept..

→ Step 17: Reject for No Coverage allows you to have the system automatically reject the lead back to the source if no coverage is found. This means that the leads scan the clients criteria input into LeadExec to check if they are matches. To use this option select *Yes.*

→ Step 18: Reject for No Sale goes one step further then Reject for No Coverage. This options actually attempts to send the lead to your clients and waits for a response before sending back a response to your lead source. To enable this option select *Yes.*

→ Step 19: Standardize Address allows you to apply USPS industry standardization to the primary address on the lead.

→ Step 20: Click *Next* to move to the Criteria Requirements section.

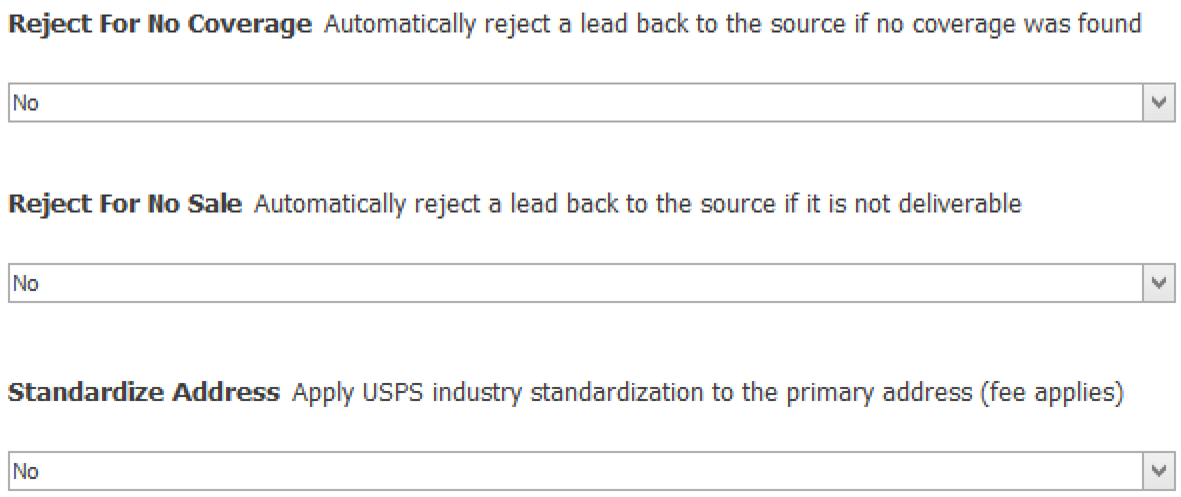


Figure 7: Image displaying the Reject for No Coverage, Reject for No Sale and Standardize Address options..

Creating a Campaign

Within the Criteria Requirements section you will be able to input incoming filters for your leads. With these filters set leads will have to match them exactly in order to enter your account.

→ Step 21:To add incoming criteria click ***Add,*** this will launch the Criteria Details window.

→ Step 22: Select Lead Field as the Criteria Type. Any other Criteria Types please contact your support agent.

→ Step 23: Select the field you wish to use as your criteria field.

→ Step 24: Select the Operation type that best fits with your criteria.

→ Step 25: Fill out the Details with the values you are willing to accept.

→ Step 26: Click ***Next*** to generate your posting instructions to give to your lead source or developer.

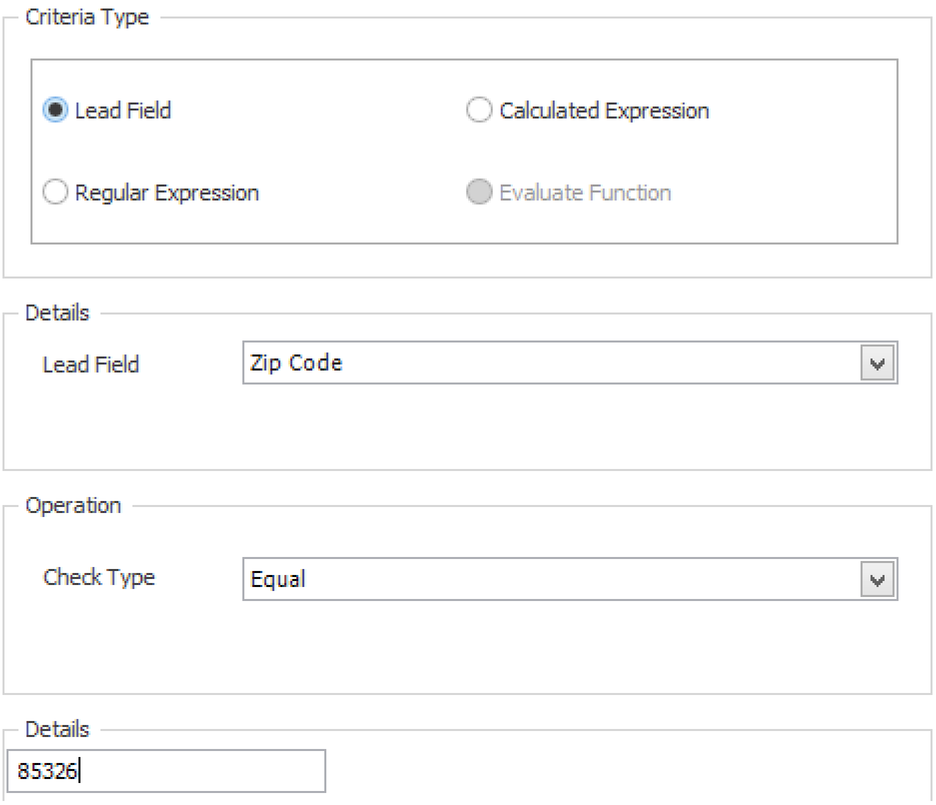


Figure 8: Image displaying the Criteria Details window set to only accept 85326 as a zip code.

Creating a Campaign

Generating Posting Instructions will get your Lead Source or developer the information they will require in order to post directly into the campaign they are generated from.

→ **Step 27:** To generate posting instructions, select *Generate Instructions* under one of the 3 methods LeadExec supports for lead submission. Once you have done this you will be asked to save your changes. Click *Yes*. You will then see a quick overview of the instructions that are going to be generated for you. Click *Print/Export*. From there you will be able to export those instructions to one of many file formats. Click *Close* once you are done!

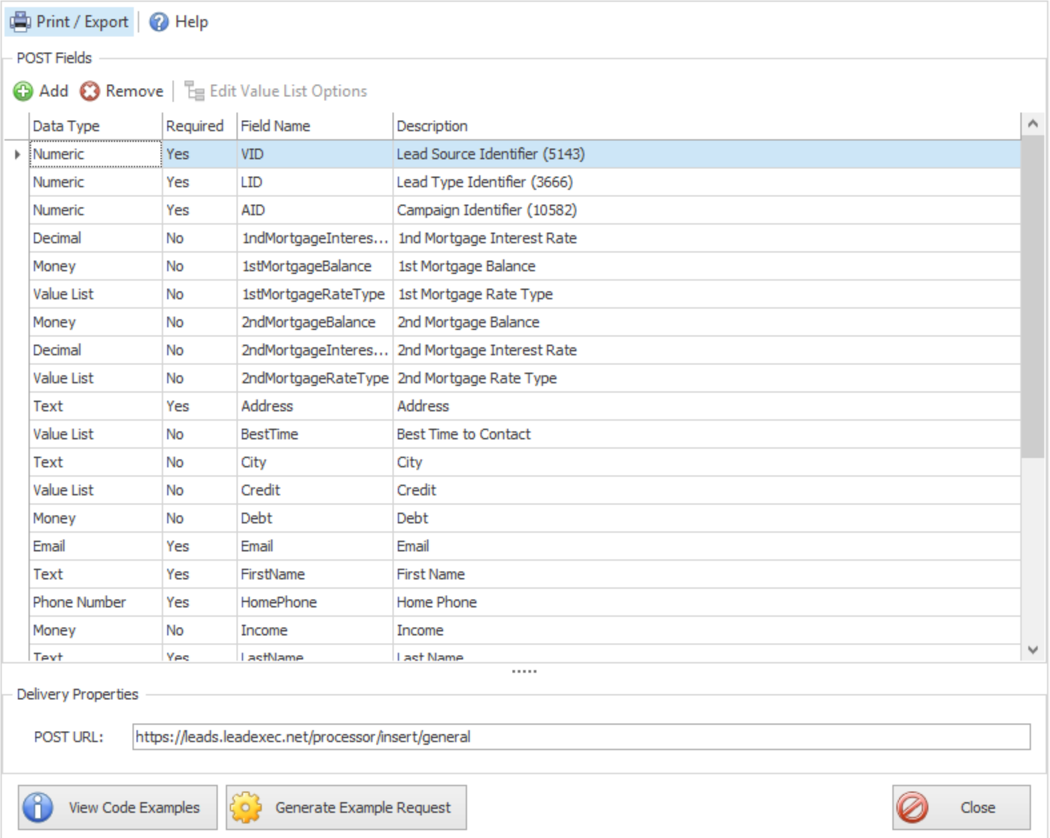


Figure 9: Image displaying Posting Instructions Overview.

F.A.Q.

→ **Q.** Why would I send my leads to the Quality Control Bin?

→ **A.** Allowing your leads to flow into the Quality Control bin as they come in gives you the ability to manually validate leads and offer manually verified leads out to your clients. You can also use the Quality Control Bin as a Test lead receptacle. Allowing your lead source to send in test leads without the hassle of having to block your clients from receiving them.

→ **Q.** Does this campaign support Live Call Transfers? If so how do I generate the form?

→ **A.** Yes, once you have completed the Campaign setup process you are able to generate a Lead Form with the option to use Return Live Call Clients. For more information on Live Call Transfers see the Getting the Most Out of your Leads article.

→ **Q.** Once this is set up, am I good to start receiving leads?

→ **A.** Yes, from this point on you are good to receive leads. Get the posting instructions generated from this campaign to your developer or lead source; once they implement the integration you will see leads flowing in!

→ **Q.** Do I create a campaign for every vertical my lead source is going to be submitting?

→ **A.** Yes, you are going to want to create a campaign for every vertical that your lead source will submit. You will also want to create a campaign for every price point.

→ **Q.** Where can I find leads that have been going into the Quality Control Bin??

→ **A.** Once you set the option to send the leads to the Quality Control Bin you can navigate to the Quality Control Bin by following **Leads** > **Quality Control Bin**.

Setting Up Clients

Figure 1: Selecting your *Clients* tab

→ To begin Setting up Clients, click on the *Clients* tab *(As Shown in Figure 1)*

→ Select *Add New* to Launch the Client Setup Wizard.

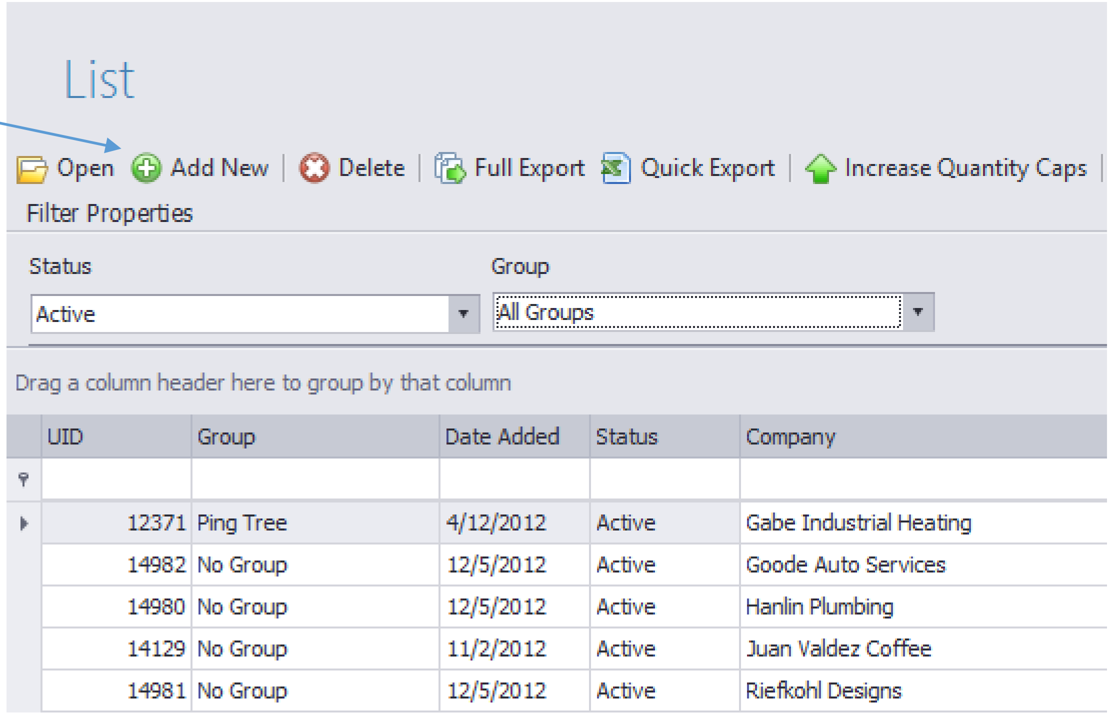


Figure 2: Click Add New to Launch the Client Wizard.

Setting Up Clients

Step 1. Contact information.

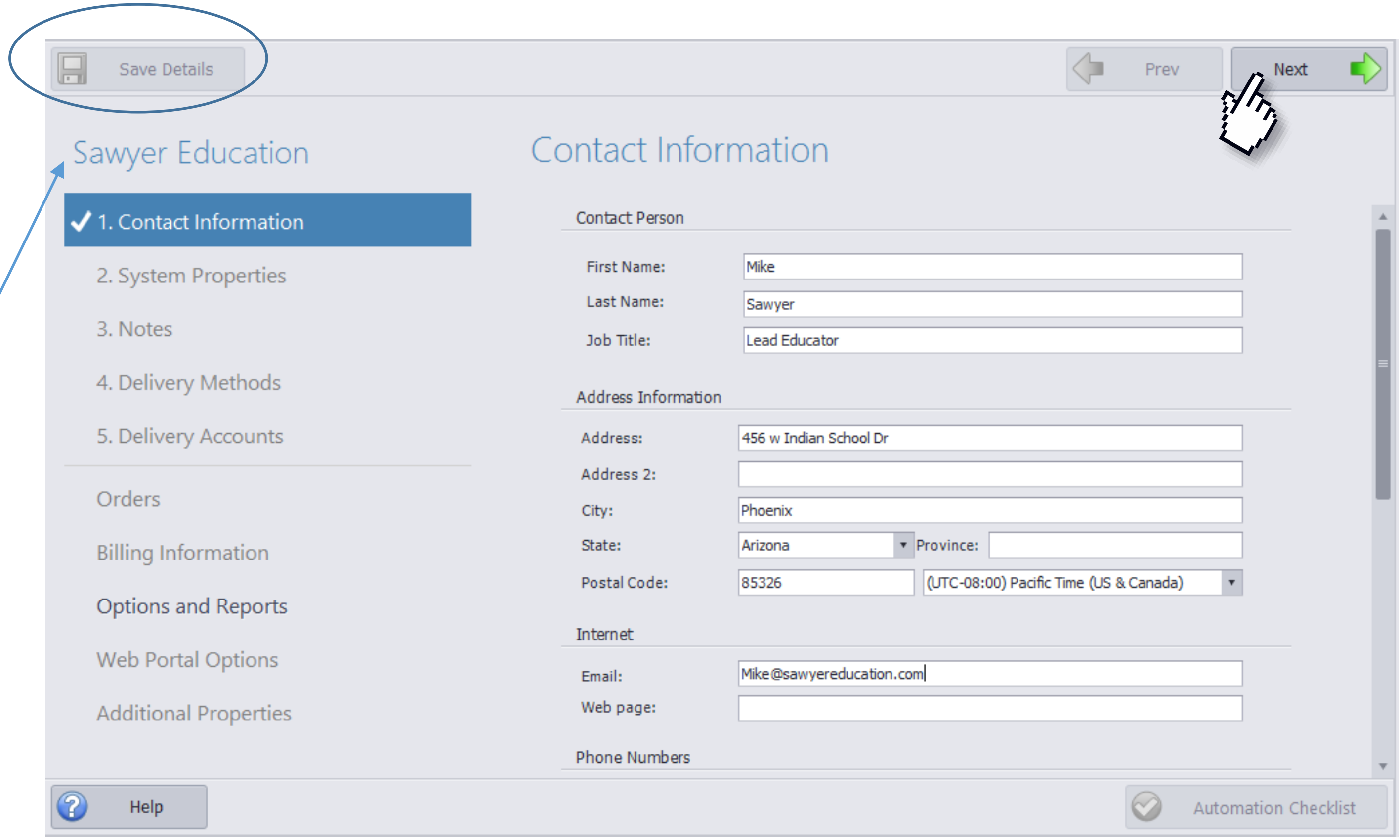
→ When you enter the Setup Screen, you will notice the Save Details Feature is Greyed out. This is because you must first Complete these steps in order to proceed

  → 1 – Contact Information
  → 2 – System Properties
  → 3 – Notes

→ Step 1 will cover the basics of your client. This will contain their contact information.

→ The name of your client will appear in the top left hand corner.

→ Please be sure to fill out everything up to the Email before Clicking the *Next* arrow to proceed.



Setting Up Clients

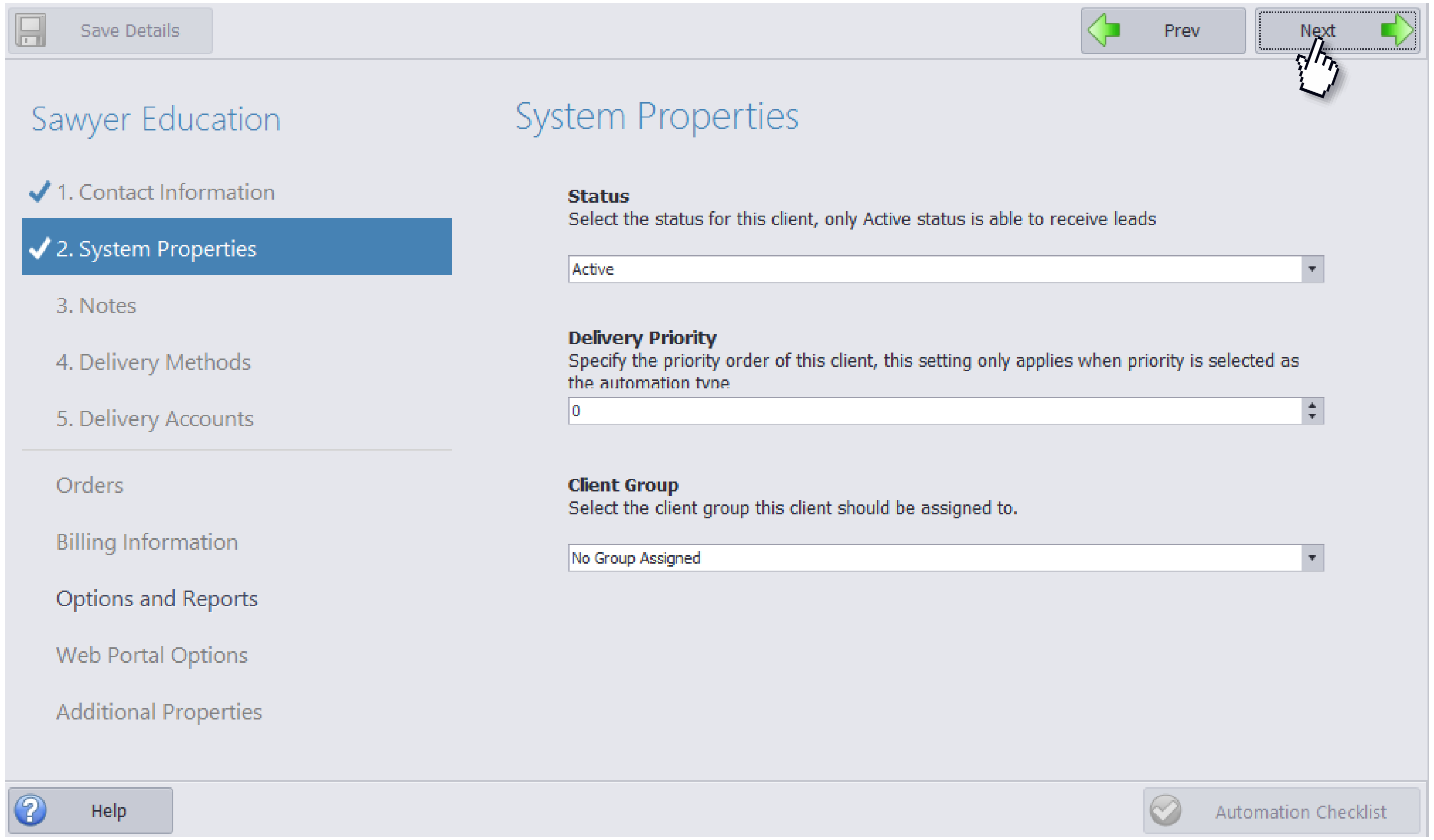
Step 2

→As you proceed you will notice a blue checkmark on the previous or current step to signify that item has been completed.

→Step 2 : This step will ensure the following Items:

- → Status – This will ensure that your client is active to receive leads.
- → Delivery Priority – This allows you to set the priority of clients in the system, just in case you need one client to get a higher priority than another

  Note: 0 is the highest priority in the system, in order to make them lower, count upwards from 1 IE 0,1,2,3,4 ETC
- → Client Group - This is where you would inform the system if this client should belong to a client group. *(Please reference how to create a client group for more information)*



→ Click on Next to Proceed

Setting Up Clients

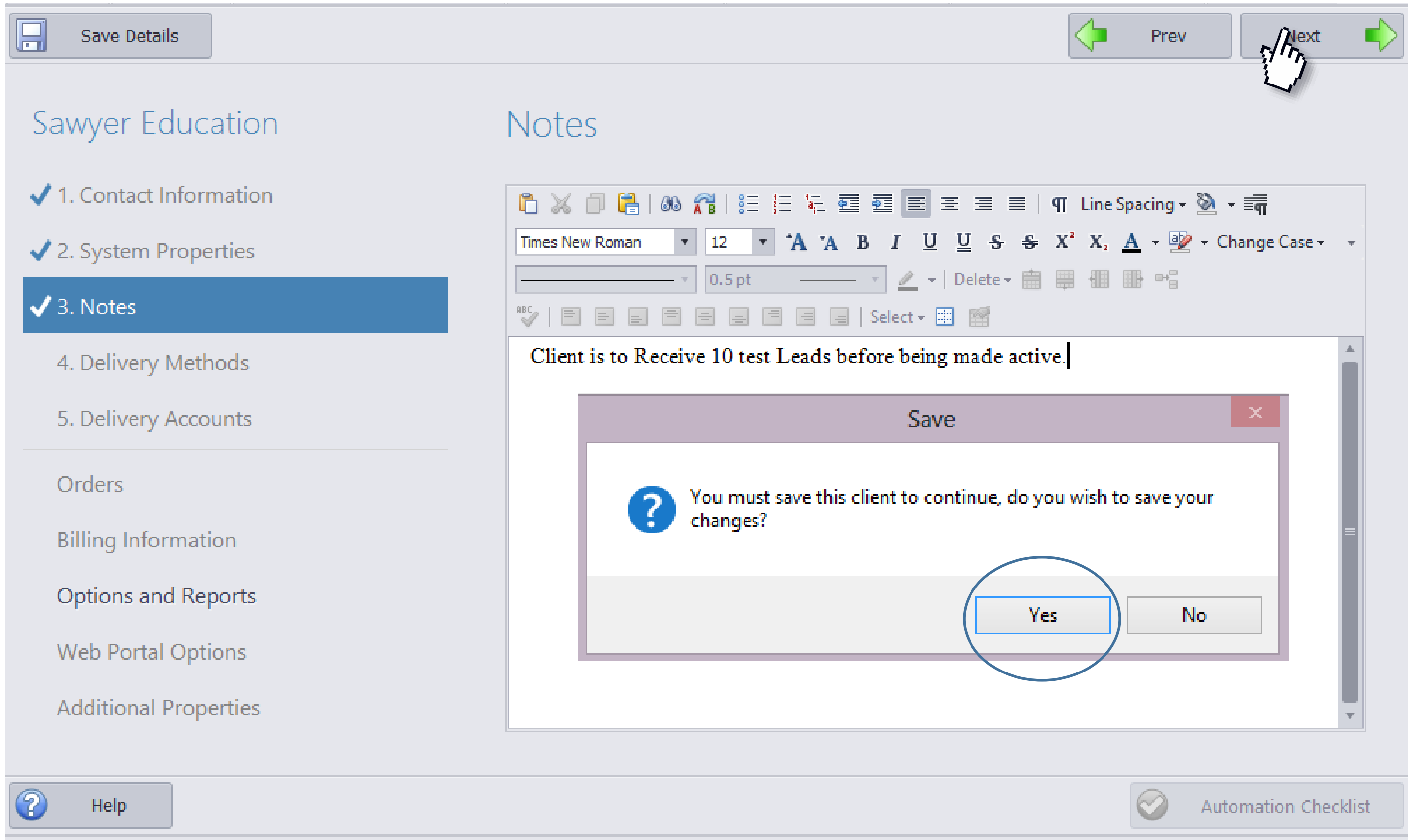
Step 3

→ Step 3: This is the Notes section of your Client. This will allow you to make any important annotations upon startup or in the future.

→ i.e. I have made a note to ensure that users know this client will receive 10 Test Leads before going Live.

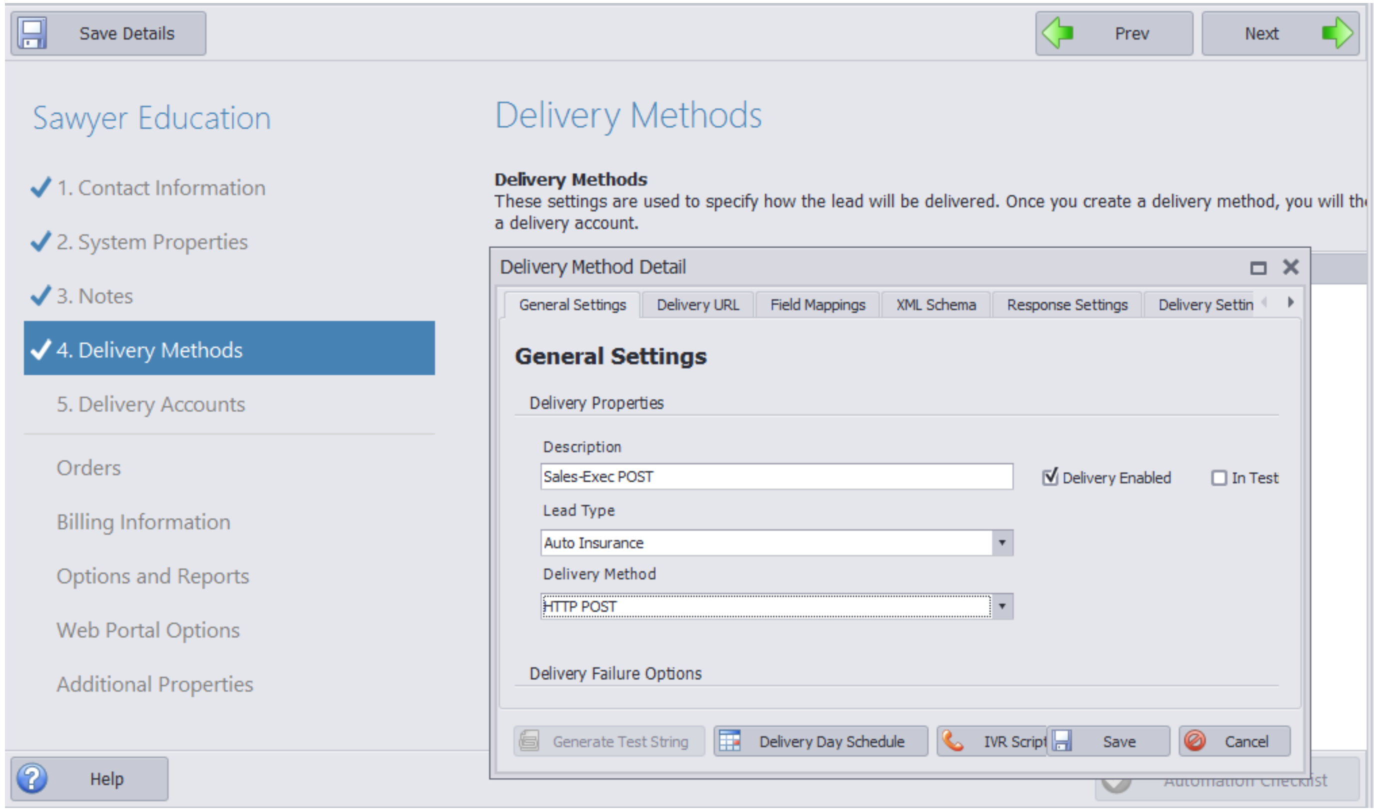
→ This time when you click *Next* you will be prompted for a *Save* before moving onto your Delivery Methods.

→ Click *yes* to continue.



Setting Up Clients

Step 4. Delivery Methods.



→When you First Click on ***Delivery Methods***, your Delivery Method Details Screen will appear.

→ On This Screen you will give a Description of the Method.

→ Select your Lead Type.

→ Select the Kind of Delivery Method You Want to Use. As of this moment we offer:

- Http Post
- XML POST
- Internal Delivery
- SOAP POST
- SMS Messaging
- Email

→ And Others! To name a few.

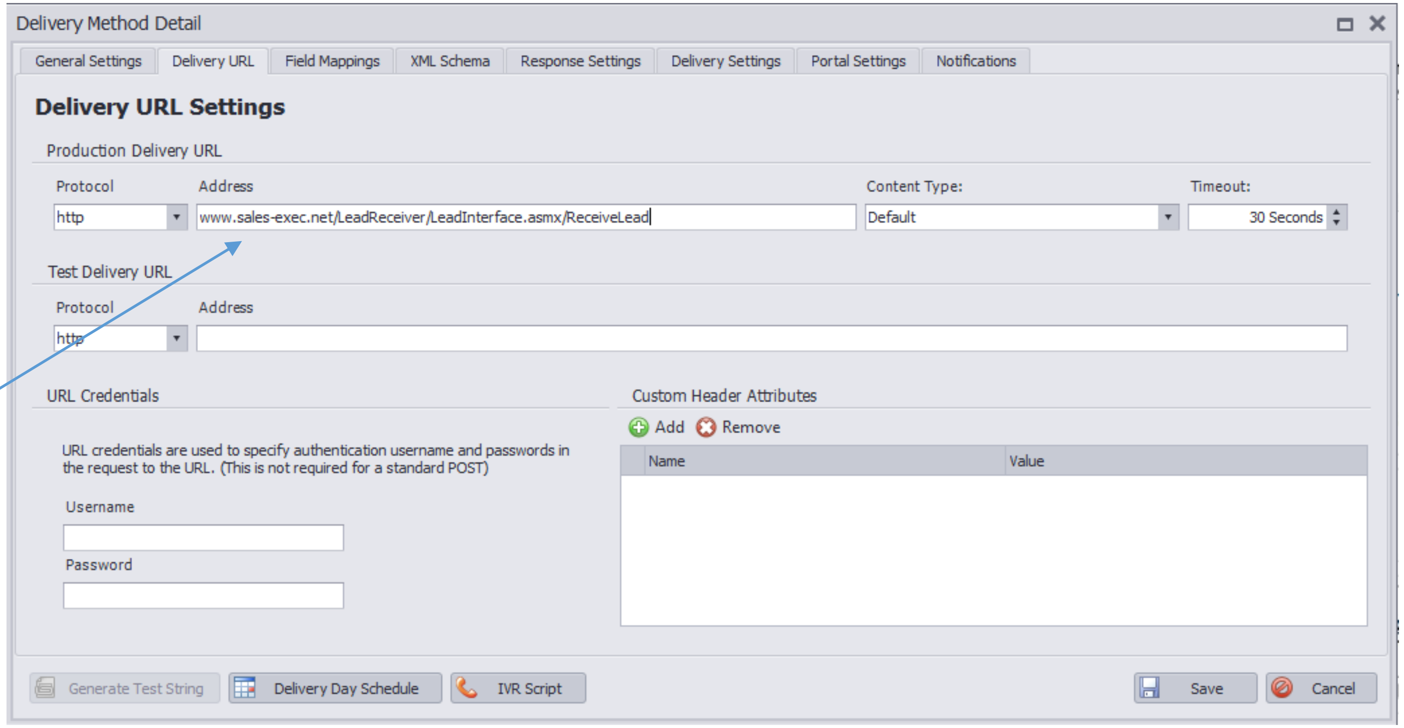
→ Ensure that Delivery is Enabled in order to send leads.

→ IF Testing your Method, ensure the *In Check* Check box is enabled.

→ Delivery Day Schedule – Use this feature to set a schedule for your clients. i.e. They only accept leads Monday through Friday.

Setting Up Clients

Step 4. Delivery Methods (cont.)



→ Moving Forward with our methods, we must now input our Delivery URL Settings.

→ What This Means

In order for a POST or any lead to deliver out to a system, a delivery URL is required.

→ Test Delivery URL:

Note: Only use this URL if you are given a Staging Environment. If the " In Testing" option is checked our system will use the test url provided to deliver leads.

→ Content Type – Set the content type of your Delivery, By Default most HTTP POSTS can use the default option shown. In case you need to change the type to XML/Text content, click the dropdown to change.

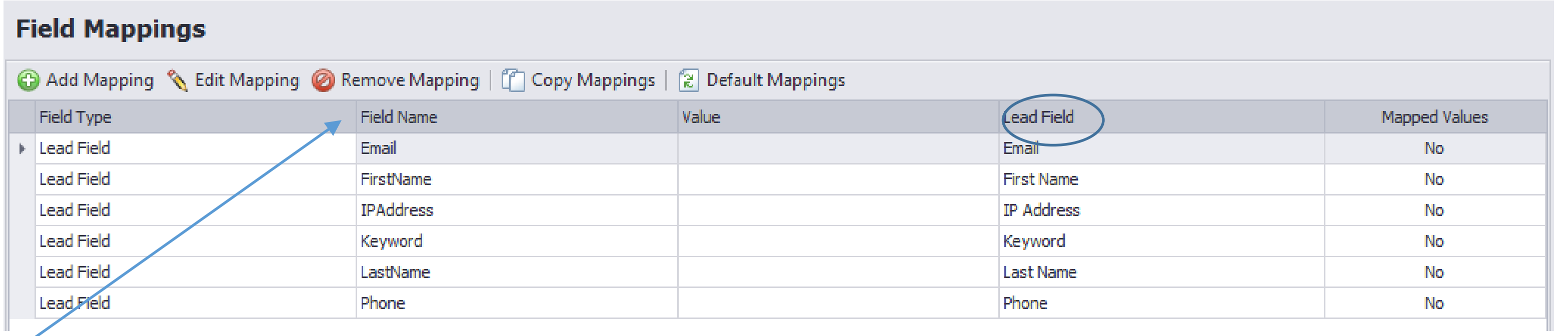
→ Timeout – You can set a timeout on your clients so you can ensure that if a client takes more than X seconds to respond, the delivery will fail and move onto your next client.

→ URL Credentials – Use these items in case you need to send a Username and Password for authentication purposes when sending your Leads.

→ Custom Header Attributes – These attributes are used to define Custom Fields. More often than not they are used for SOAP Actions.

Setting Up Clients

Field Mappings



Field Mappings

Add Mapping | Edit Mapping | Remove Mapping | Copy Mappings | Default Mappings

Field Type	Field Name	Value	Lead Field	Mapped Values
Lead Field	Email		Email	No
Lead Field	FirstName		First Name	No
Lead Field	IPAddress		IP Address	No
Lead Field	Keyword		Keyword	No
Lead Field	LastName		Last Name	No
Lead Field	Phone		Phone	No

→ Field Mappings – Field Mappings are where you begin assigning your lead values to the values of your CMR provider.

→ This is the LeadField as it applies to YOUR system

→ The Field Name is how LeadExec will pass it into your CRM provider.

→ Mapped Values – These are fields (most commonly dropdown fields) in your system that can be "mapped" i.e., have their value changed from what you contain to another in order to pass the correct data.

→ Value – This will show you any Static Value that is placed for a particular field.

Setting Up Clients

Field Mappings (cont.)

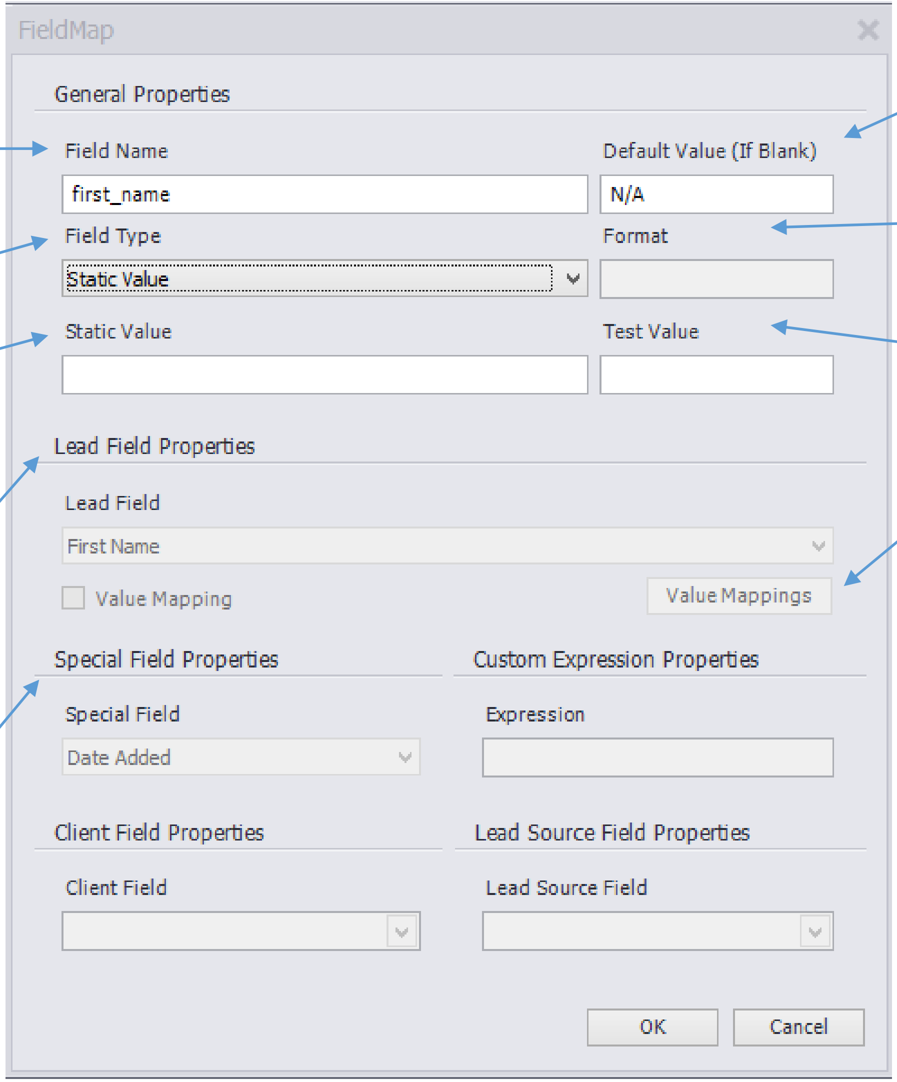
Field Name – This will be the value passed into your client CRM

Field Type – Selects the Type of Field your system will be referencing for the Field Name

Static Value – Assigns a static value to the system to be passed every time.
Note: Requires the Field Type to be set to Static Field.

Lead Field – Assigns the Field Name the Lead Field it will be referencing when passing Data.i.e.: first_Name (Field Name) = FirstName (Lead Field)
Note: Requires the Field Type to be set to Lead Field.

Special Field Properties – These values allow you to add special system fields, Custom Expressions, Client Fields and Lead Source fields. To assist in setting these up please contact your ClickPoint Software Account Manager.

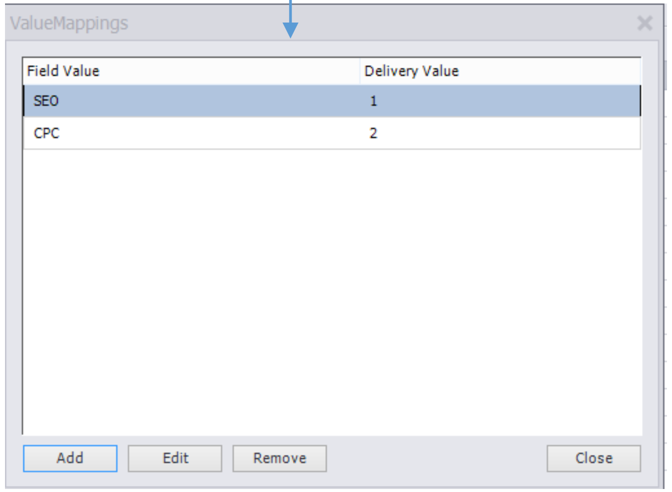


Default Value – This will pass a default value if no data is found for this Field Mapping.

Format – Allows you to format the field so that you can manipulate data For Example: (yyyy/MM/DD) (DD/MM/yyyy) (MM/DD/yyyy)

Test Value – This will be the value passed when the delivery method is designated as *in testing.*

Value Mappings – This is where you can take values from within a dropdown, and match them to another value, for example:

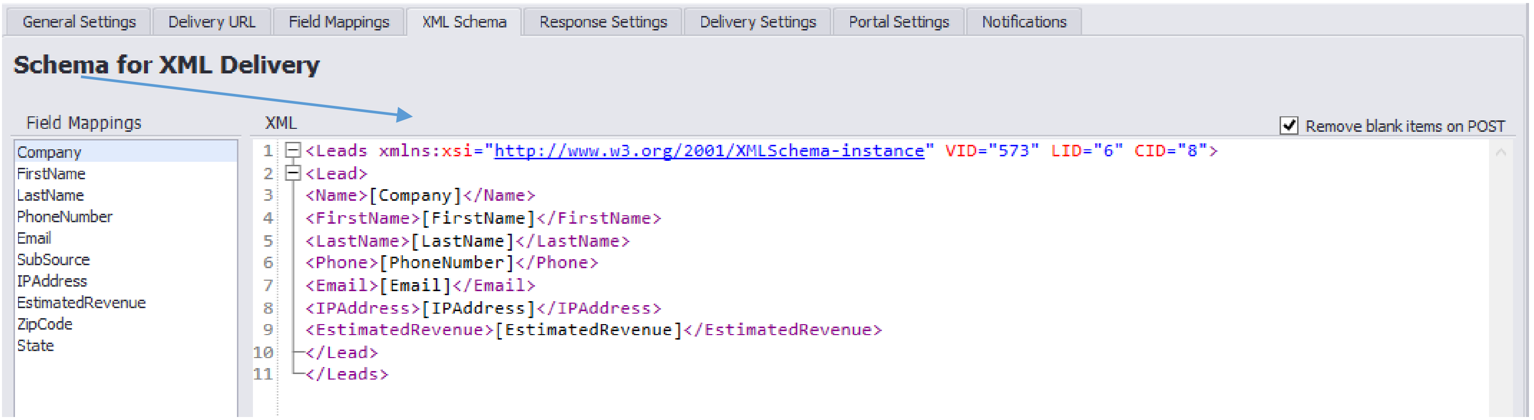


Setting Up Clients

XML Schema

→ After Field Mappings, if you are doing an XML POST you will have to input your schema into the following XML Schema tab. Simply copy and paste the schema into this.

→ To Connect Data, Select your field mapping and place the field in between the nodes. For Example, the First Name Field Mapping will be placed in between the First Name XML Node.



Setting Up Clients

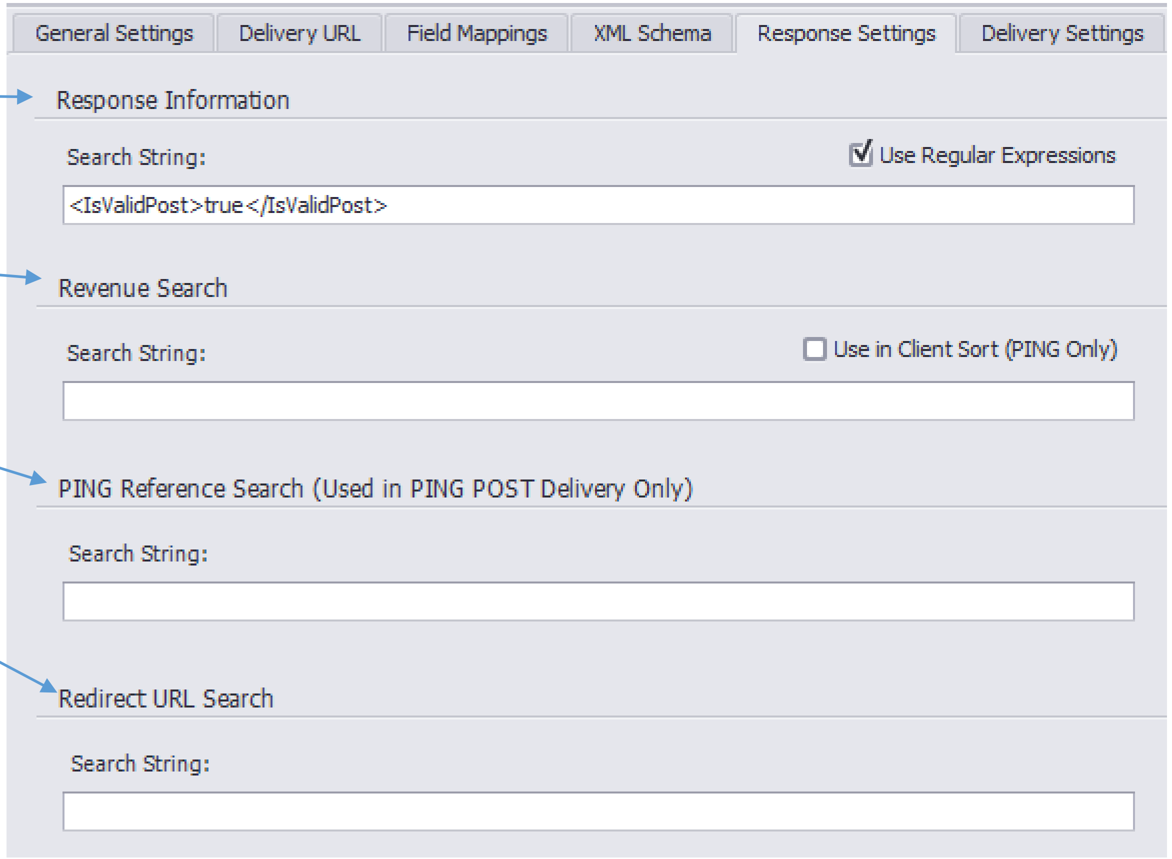
Response Settings

→ Response Settings Tell LeadExec what to look for when searching the clients response on an accepted lead.

→ Revenue Search – This will be used to Search for any Prices returned in the client response.

→ Ping Reference – This will capture Ping Token when a Ping/Post Method is enabled.

→ Will grab a Redirect URL from your clients response to send back to your form to process a redirect.



Setting Up Clients

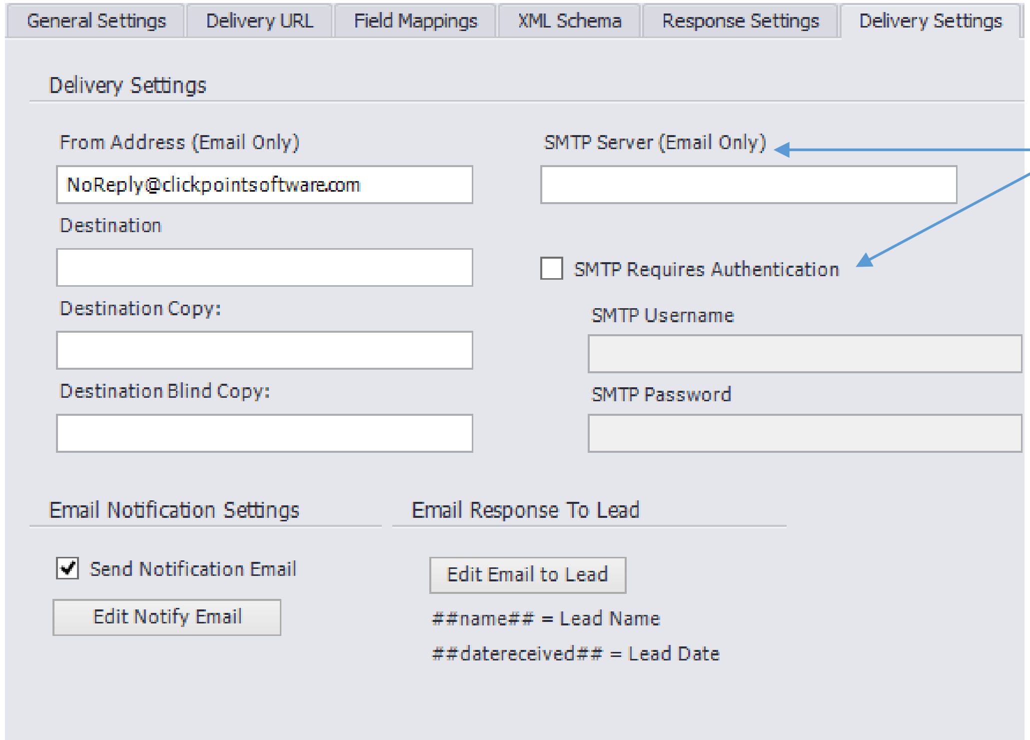
Delivery Settings

→ The Delivery Settings Option portion of your delivery method allows you to send a notification email to your client that they have a lead. To set this up do the following

→ Include a from address. This will be the address your client sees in their email when a lead is viewed.

→ Destination – This will pull from the email placed on the contact information OR you can put your own destination email to add multiple emails use the , to separate i.e. (email1@email.com,email2@email.com)

→ Destination Copy and Blind copy are used to set up CC and BCC options for delivery.



→ SMTP Server – This can be used if you want to use your own SMTP server for Email Delivery. It will require the SMTP Server Address

→ If you require a username and password, you may enter them as well.

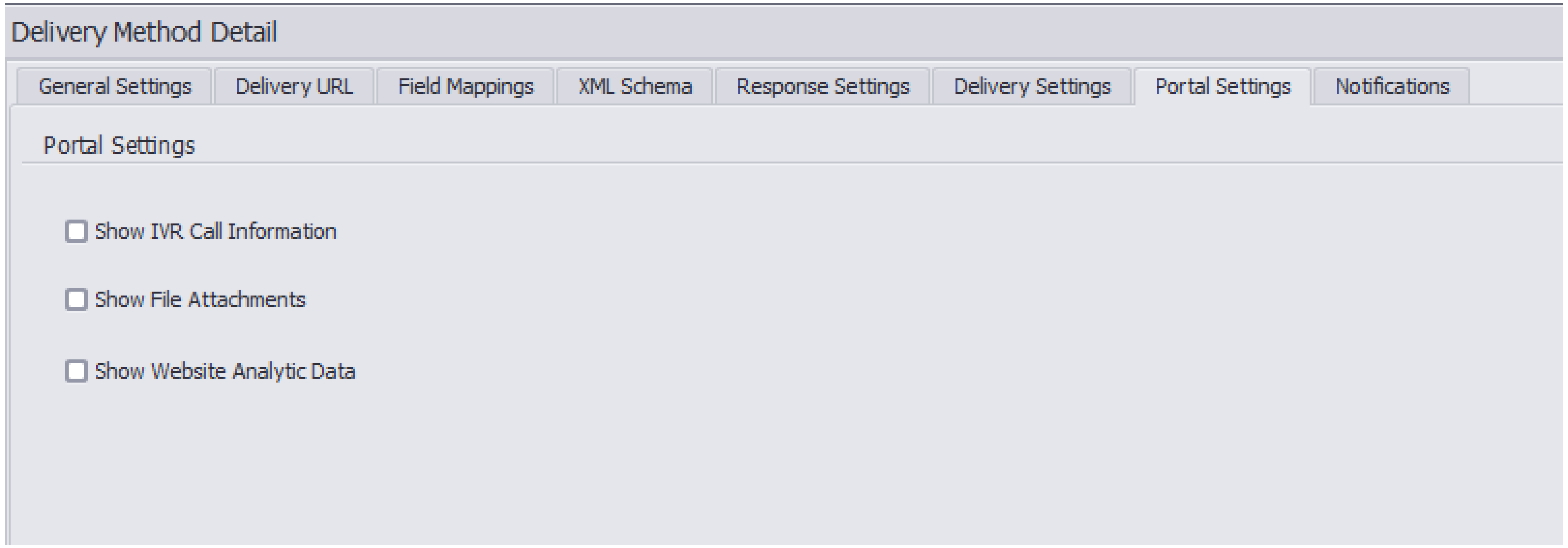
→ Sent Notification Email. This will send a notification Email to the client who receives the lead. You do have the ability to edit this email via an HTML Editor.

→ Email Response To Lead – Customize your Response to your lead via an HTML editor.

Setting Up Clients

Portal Settings

- → Portal Settings From this Screen will allow the Client Portal to Show
- → IVR Call Information – Only works if sending IVR Leads
- → Show File Attachments – Allows users to attach files in the client portal
- → Show Analytic Data – If using the Analytics system you can display the Referrer and Search Term

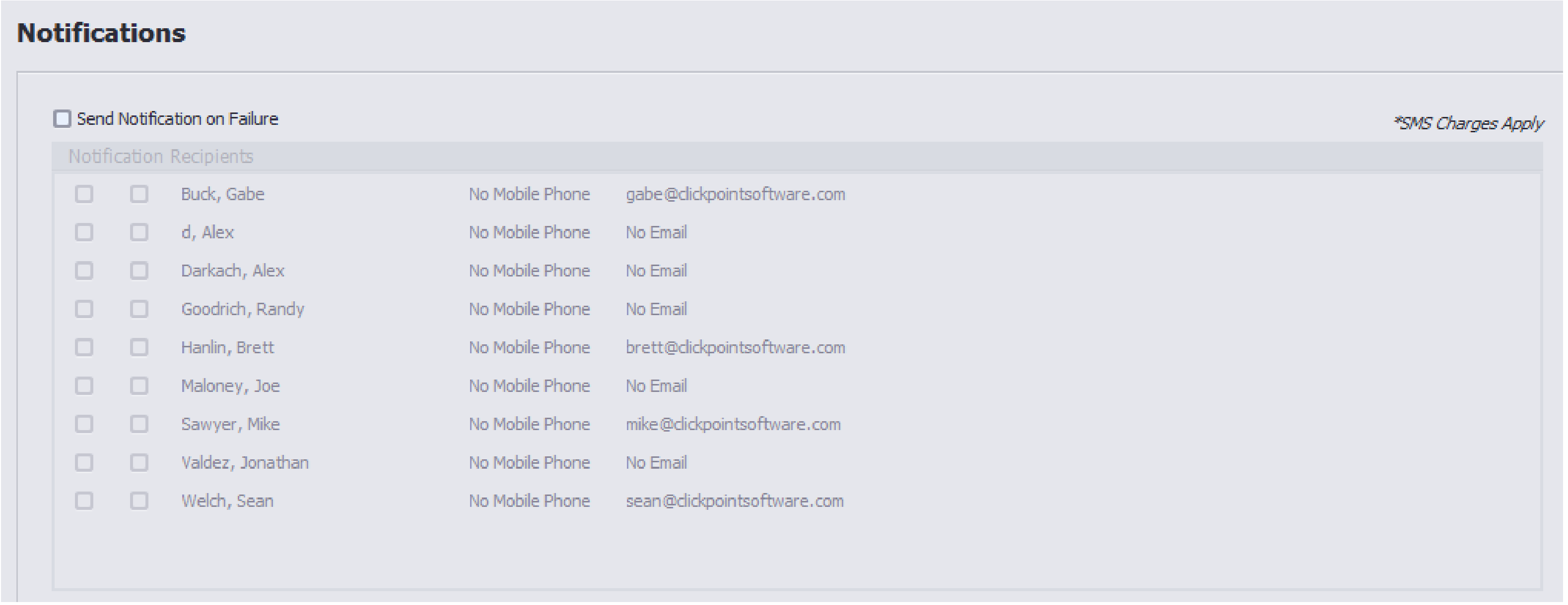


Setting Up Clients

Notifications

→ On this Page you have the ability to send specific users notifications when a delivery fails by checking the *Send Notification Failure* box. You can select specific users in the system to receive either an

- Email or
- SMS Notification * SMS charges do apply.



Setting Up Clients

Delivery Accounts

→ The Last Step when creating a client is to set up their delivery accounts. With delivery accounts you can

- Dictate Price
- Set Criteria
- Set cap limits
- Set exclusivity
- Set Automated Delivery

→Click on the ***Create*** Button to begin Delivery Account Setup

Setting Up Clients

Delivery Account General Information

→ General Information is where you will supply the following information

→ Name – Provides a name for this particular delivery account.

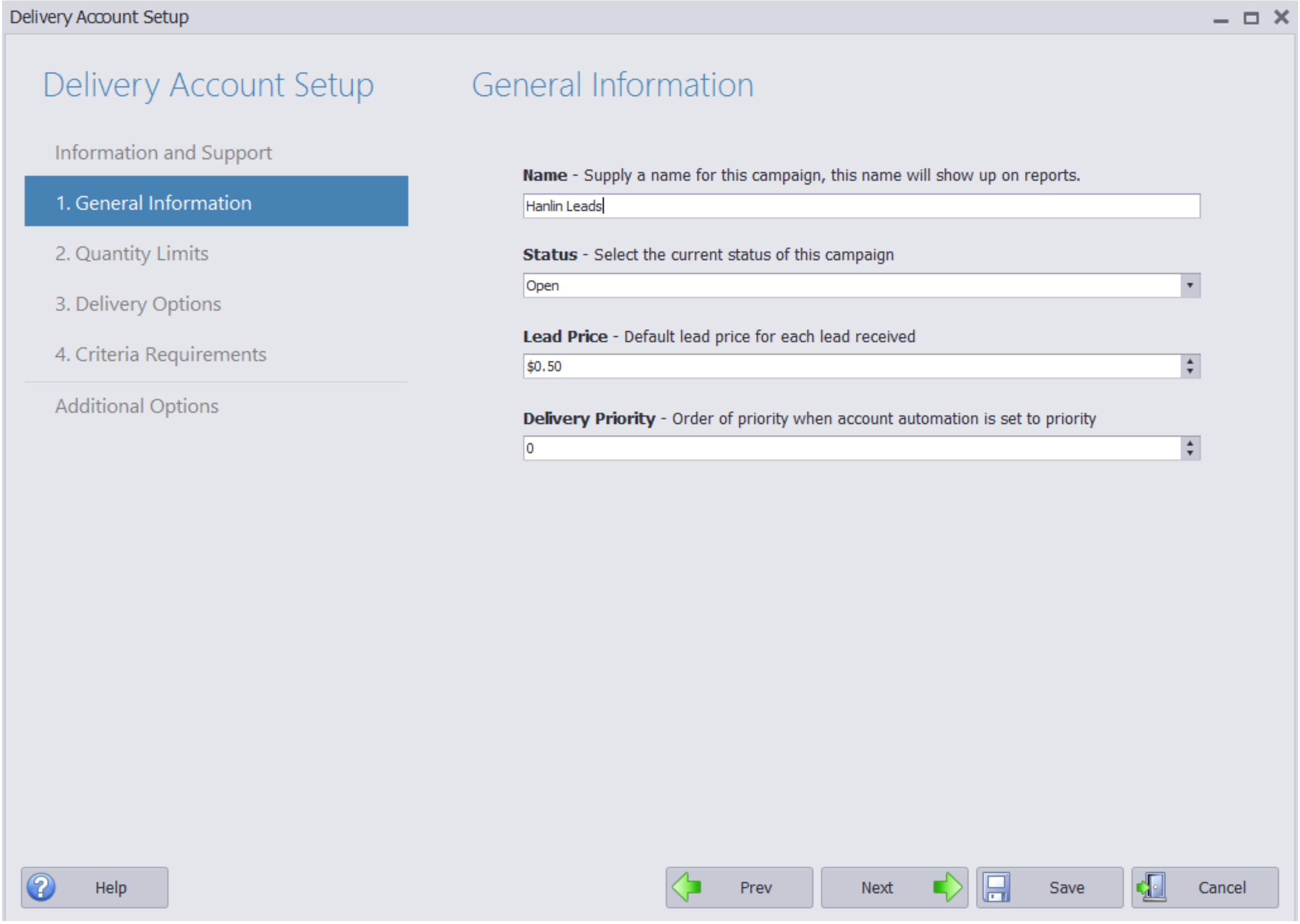
→ Status – Lets the system know whether this specific delivery account is open or any other option such as

- Close
- On Hold
- Paused
- Etc

→ Lead Price – This is how much your client is paying for the lead.

→ Delivery Priority – within a client's account you have the ability to specify the priority of your delivery accounts. This is useful in cases where 1 account should be receiving as many leads as possible.

→Click *Next* to move to Quantity Limits.

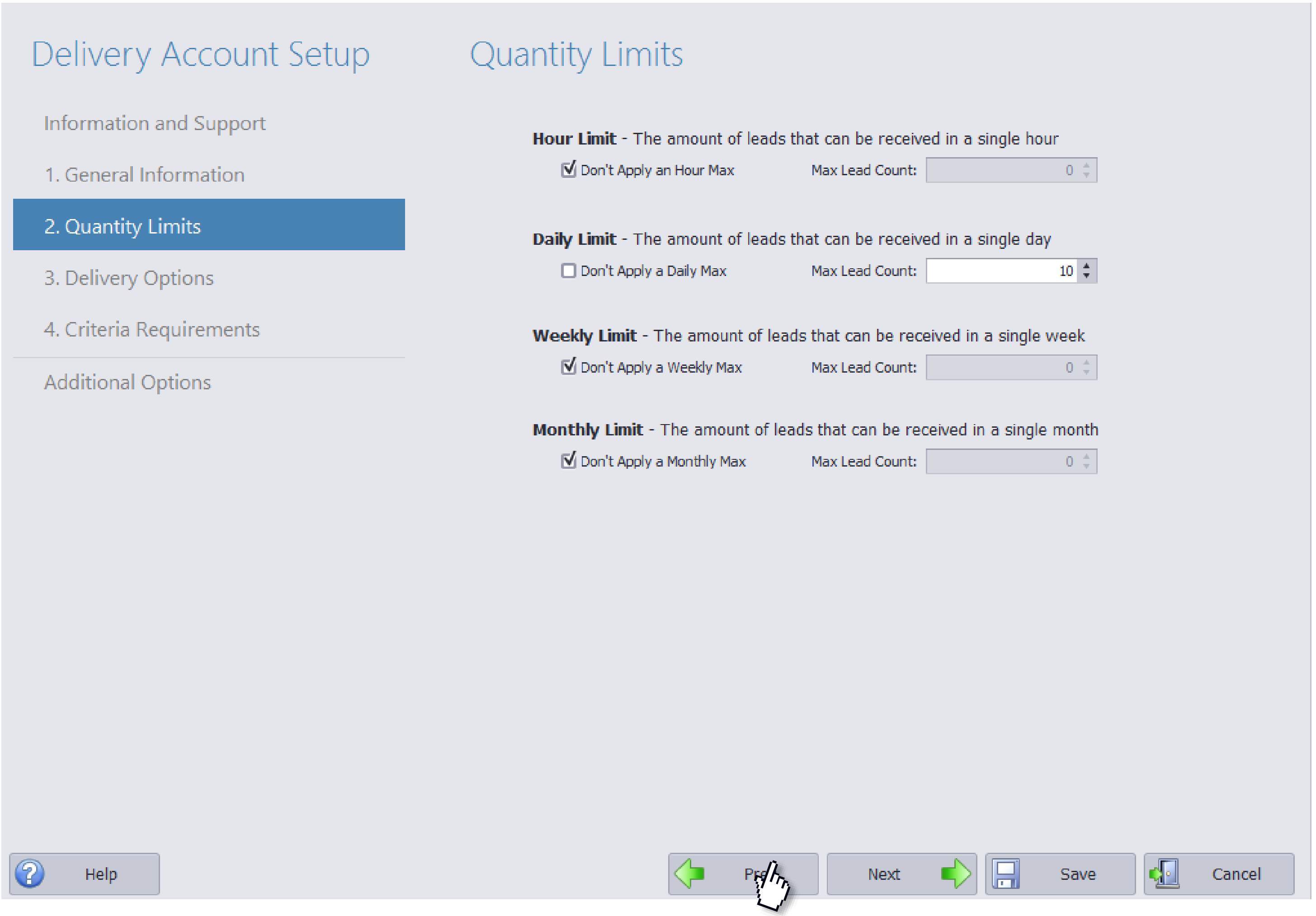


Setting Up Clients

Quantity Limits

→ Quantity limits allows you to place caps on your delivery account to control lead flow to your clients. For example this delivery account is set to only receive 10 leads a day. Click *next* to continue.

→ *Note* you do not have to place caps. They are there only as a tool for you to use and can be left at 0 to continue.*



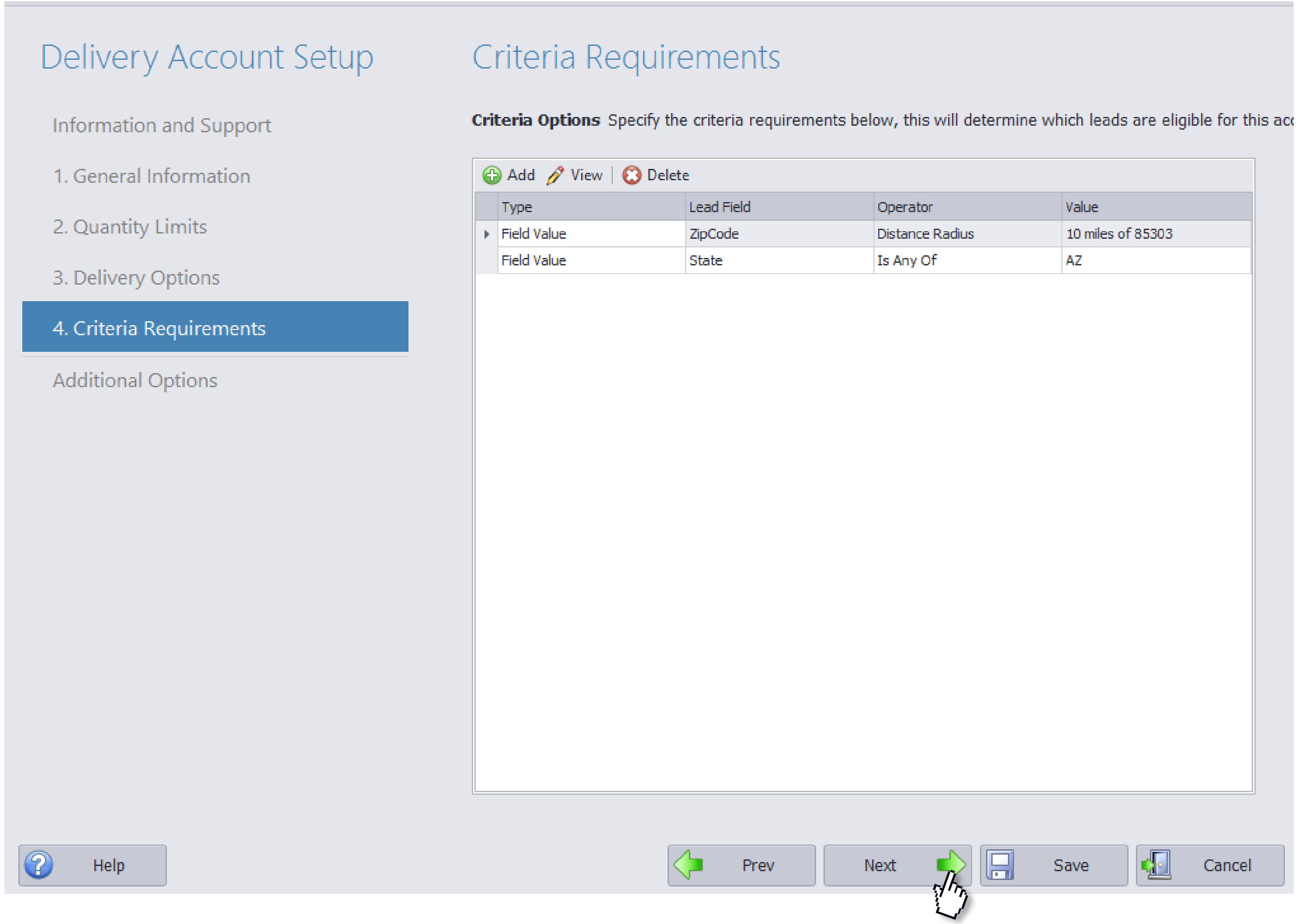
Setting Up Clients

Criteria Requirements

→ Criteria Requirements allow you to put criteria for this delivery account to ensure that your clients only get leads that they want.

→ In this example. This specific delivery account will only take leads within a 10 mile radius of zip code 85303 and has to be in the state of AZ.

→ Click ***save*** to finish your setup.



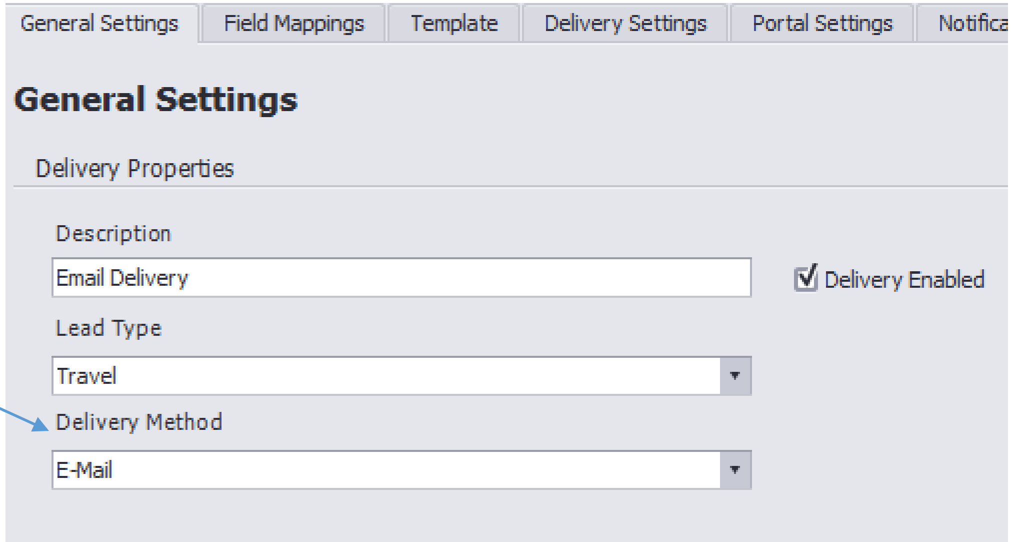
F.A.Q.

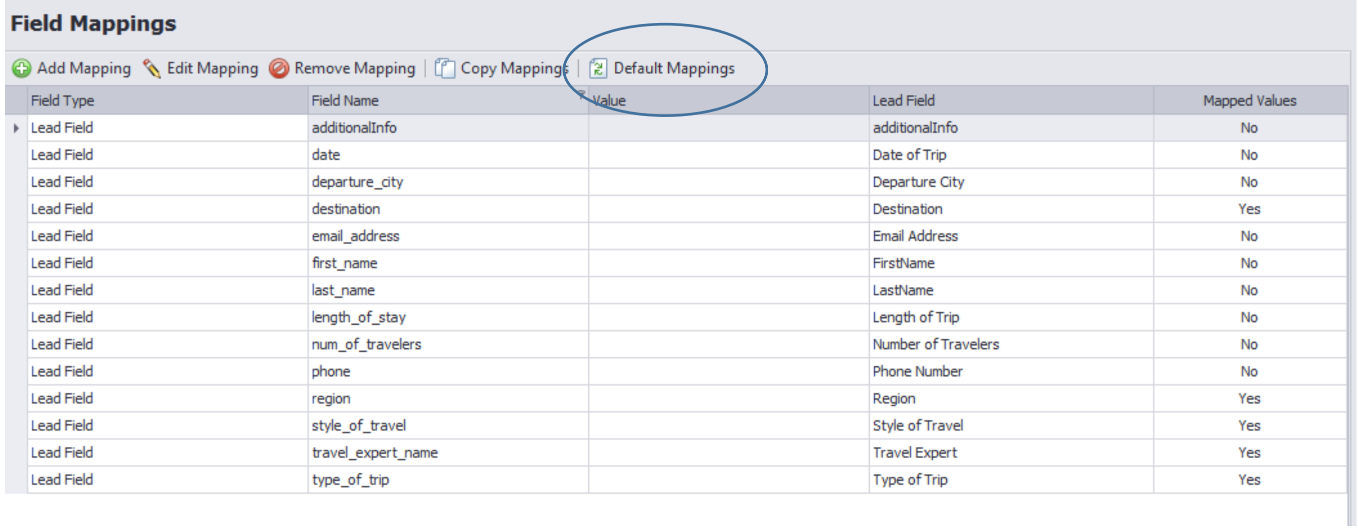
- Q. I just created a client and I can't see it, why?
  - A. When creating a new client the status may be set to ***new***, in order to view this in the client list, ensure that the "status" dropdown on your client list is set to ***show all.***
- Q. Do I need to fill out ALL of that contact information to continue?
  - A. No, all you need is an email, however ,it is recommended you put in as much information as possible.
- Q. How do I give this client access to the client portal?
  - A. You can assign a username and password under the web portal options.
- Q. What does setting a client to inactive do?
  - A. Setting a client to inactive will ensure that no leads are delivered to that client. Any status other than "active" will not deliver leads to that client.
- Q. How do I set criteria on this client?
  - A. All criteria is set on the delivery accounts, under the criteria step.

Email Delivery For Leads

→ Setting up Email Delivery is the most common method of Setting up Delivery. In order to Set up Email Delivery you must first ensure that under General Settings you have *Email* Selected

→Next ensure that you have Default Mappings set, under your field Mappings tab.

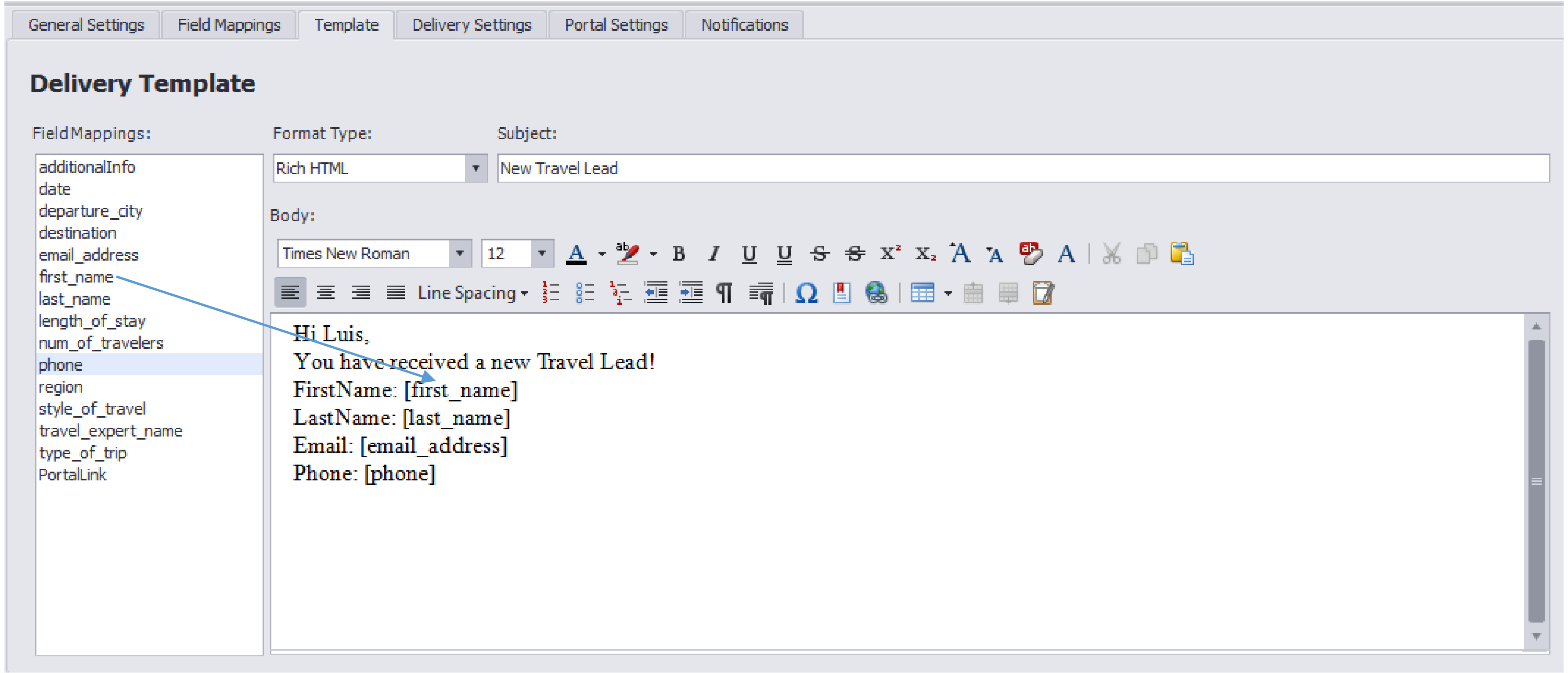




Field Type	Field Name	Value	Lead Field	Mapped Values
Lead Field	additionalInfo		additionalInfo	No
Lead Field	date		Date of Trip	No
Lead Field	departure_city		Departure City	No
Lead Field	destination		Destination	Yes
Lead Field	email_address		Email Address	No
Lead Field	first_name		FirstName	No
Lead Field	last_name		LastName	No
Lead Field	length_of_stay		Length of Trip	No
Lead Field	num_of_travelers		Number of Travelers	No
Lead Field	phone		Phone Number	No
Lead Field	region		Region	Yes
Lead Field	style_of_travel		Style of Travel	Yes
Lead Field	travel_expert_name		Travel Expert	Yes
Lead Field	type_of_trip		Type of Trip	Yes

Insert your Email Template

→ In the Template Settings you can begin setting the feel of your email template, this will be what your client will receive when an email is sent. The reason you want field mappings is so you can insert those fields into the template simply by clicking on the field name in the left hand column.



Email Delivery Settings

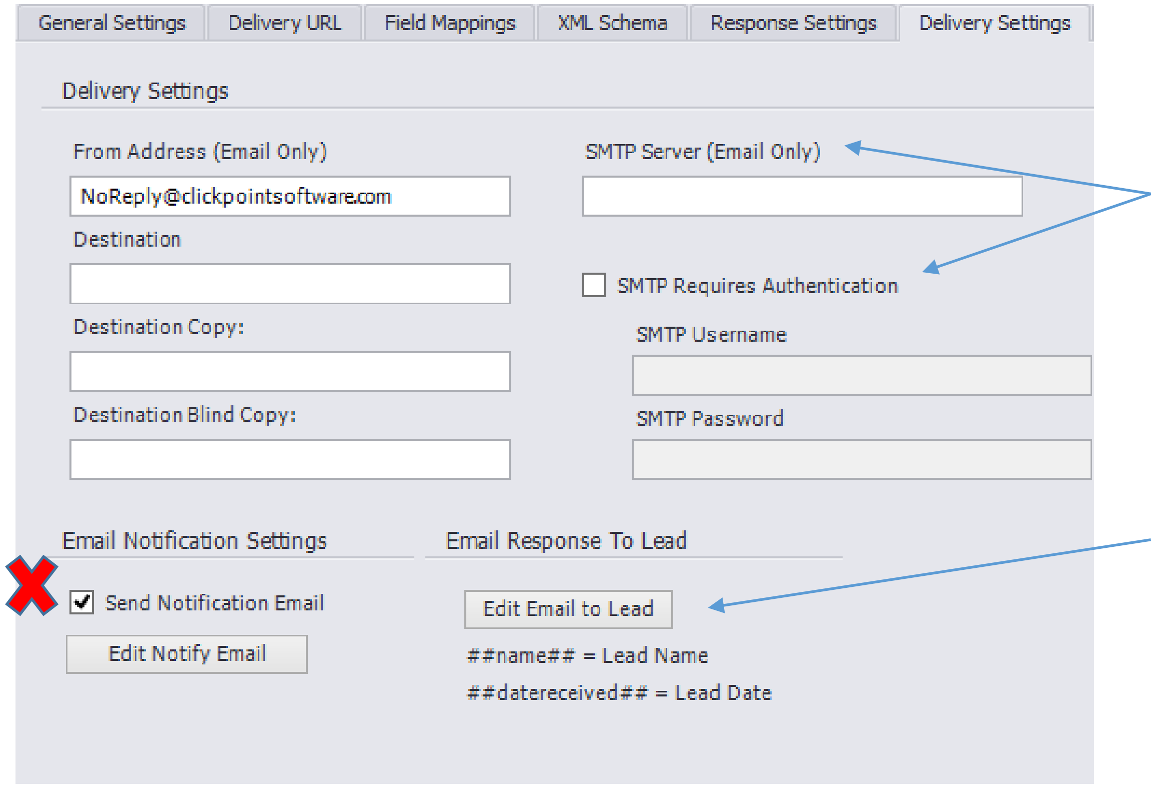
→ The Delivery Settings Option portion of your delivery method allows you to send a notification email to your client that they have a lead. To set this up, do the following:

→ Include a from address. This will be the address your client sees in their email when a lead is viewed.

→ Destination – This will pull from the email placed on the contact information OR you can put your own destination email to add multiple emails. Use the comma to separate, i.e. see below (email1@email.com,email2@email.com)

→ Destination Copy and Blind copy are used to set up CC and BCC options for delivery.

→ *NOTE: When using email delivery DO NOT CLICK send notification email*



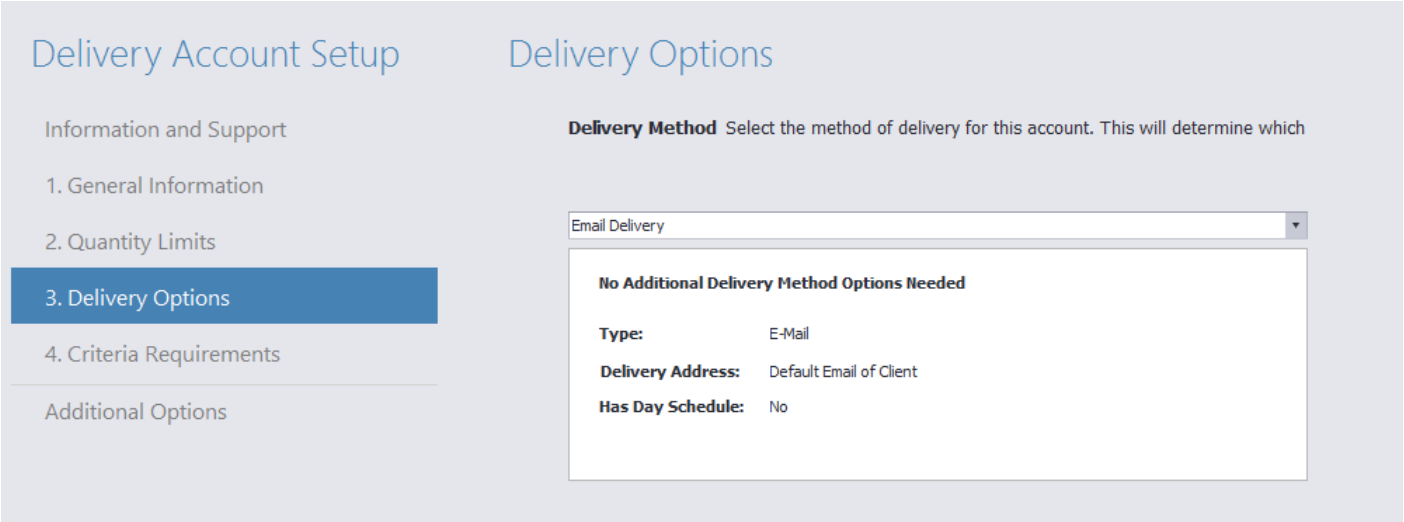
→ SMTP Server – This can be used if you want to use your own SMTP server for Email Delivery. It will require the SMTP Server Address

→ If you require a username and password, you may enter them as well.

→ Email Response To Lead – Customize your Response to your lead via an HTML editor.

Ensure your Delivery Account is set to your Email Delivery

→ The last step is to open your delivery account and ensure that under Delivery Options the delivery method is tied to the Email Delivery Created.



F.A.Q.

- → Q. How can I view my Template?
  - → A. To View your template, click on the ***delivery method*** and select the ***template*** tab.
- →Q. How do I view where this email will be delivered to?
  - → A. Under Delivery settings you can see the following
    - → The From Address (Where the lead comes from)
    - → Destination (Who the lead is going to)
    - → Destination CC (CC users)
    - → Destination BCC (Blind CC users)
- → Q. Do I need to fill out SMTP server?
  - → A. No, only fill out that information if you wish to use your own SMTP server for email delivery.
- → Q. How do I ensure that lead data gets sent in the template?
  - → A. Ensure that your fields are mapped and properly referenced in your email template.
- → Q. What does Edit Notify email do?
  - → A. Edit notify email will over-ride your Email delivery template if checked. Do not check this option.

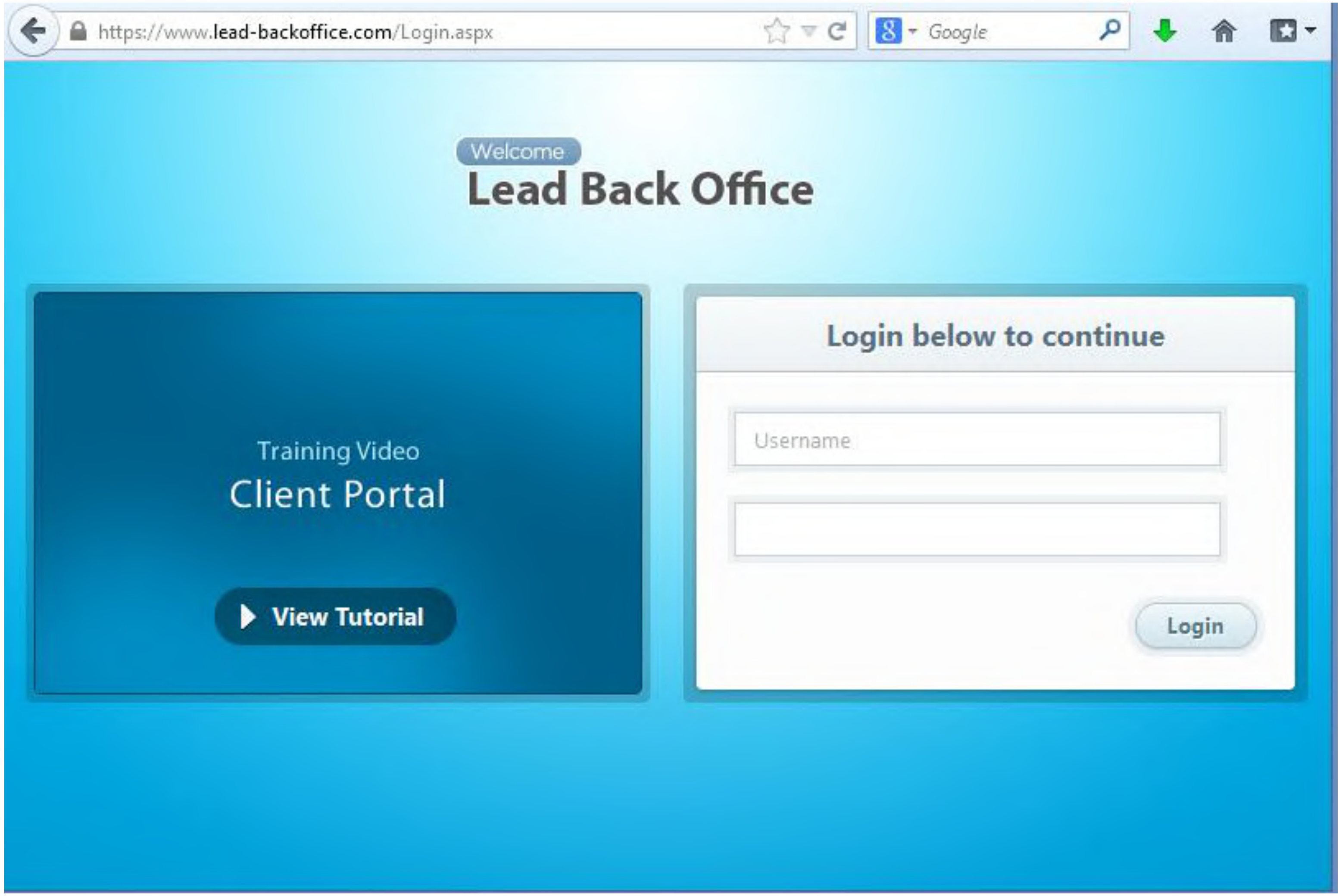
Logging into your Client Portal

→ Visit http://www.lead-backoffice.com

→ Type in Username in top field

→ Type in Password in bottom field

→ Click *Login*



Welcome Screen

→ Summary of your leads today, by week, and by month in the left hand side

→ Select *Leads* from Menu to see your leads

→ Select *Settings* to:

→ Change your password

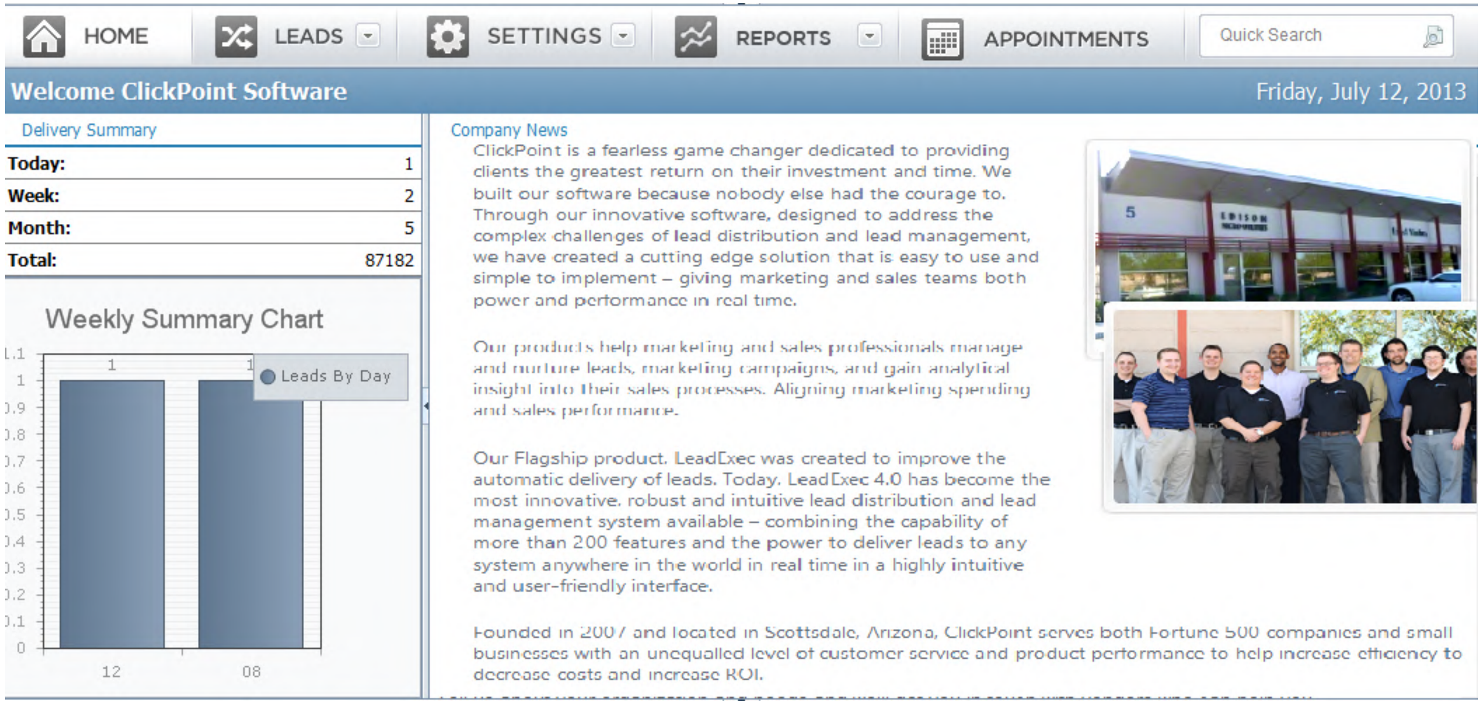
→ Provide contact information

→ Add users to your system (sales managers, sales people)

→ You may ignore the "Billing Information"

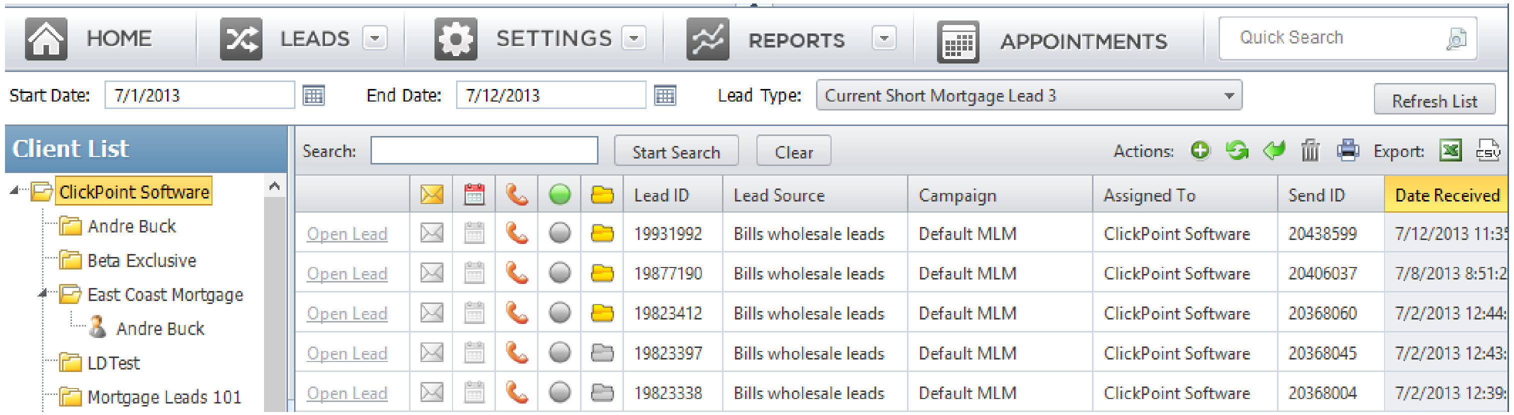
→ Select *Reports* to see leads received by dates or a summary of all leads by user

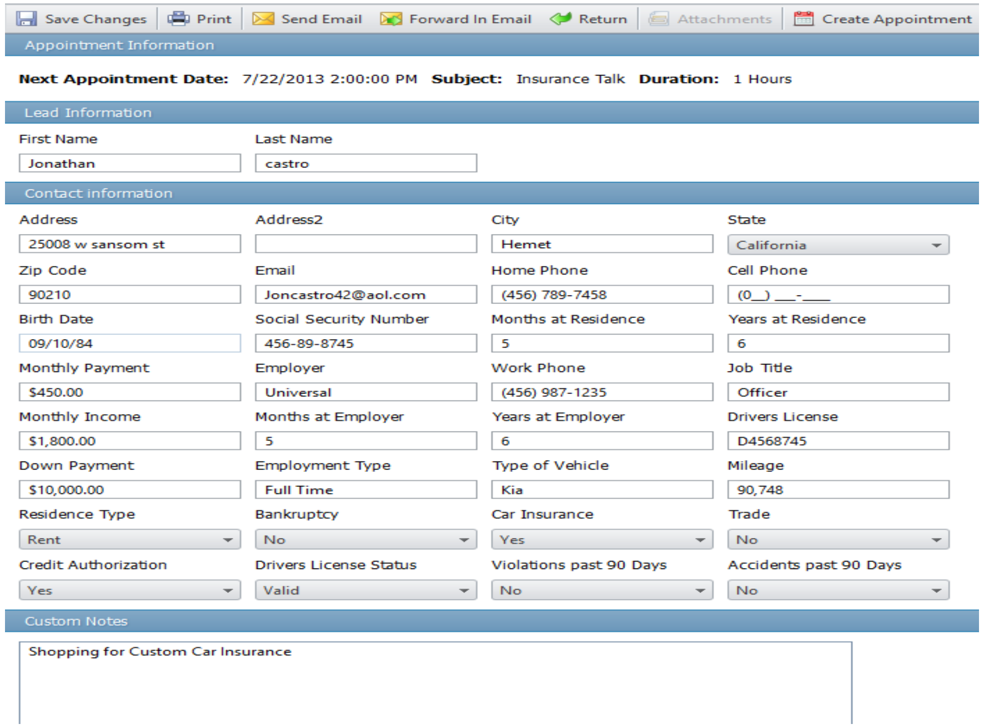
→ Select *Appointments* to see appointments which you have scheduled in the system.



Leads Screen

- → Lists all of your leads
- → Search by date range, lead type, or search through all your leads
- → Sort by clicking on the header of any row
- → Click on *Open Lead* to view lead details
- → When a lead is opened you can:
- → Print the lead
- → Send an e-mail to the contact
- → Forward the lead in an email to someone else
- → Return the lead (if it is out of your area)
- → Add attachments (quotes, other information) which you want to keep with the lead
- → Create an appointment in the central calendar





Returning Leads Inside your client portal

→ From the leads return screen your client has the ability to return any leads delivered to them. This screen can:

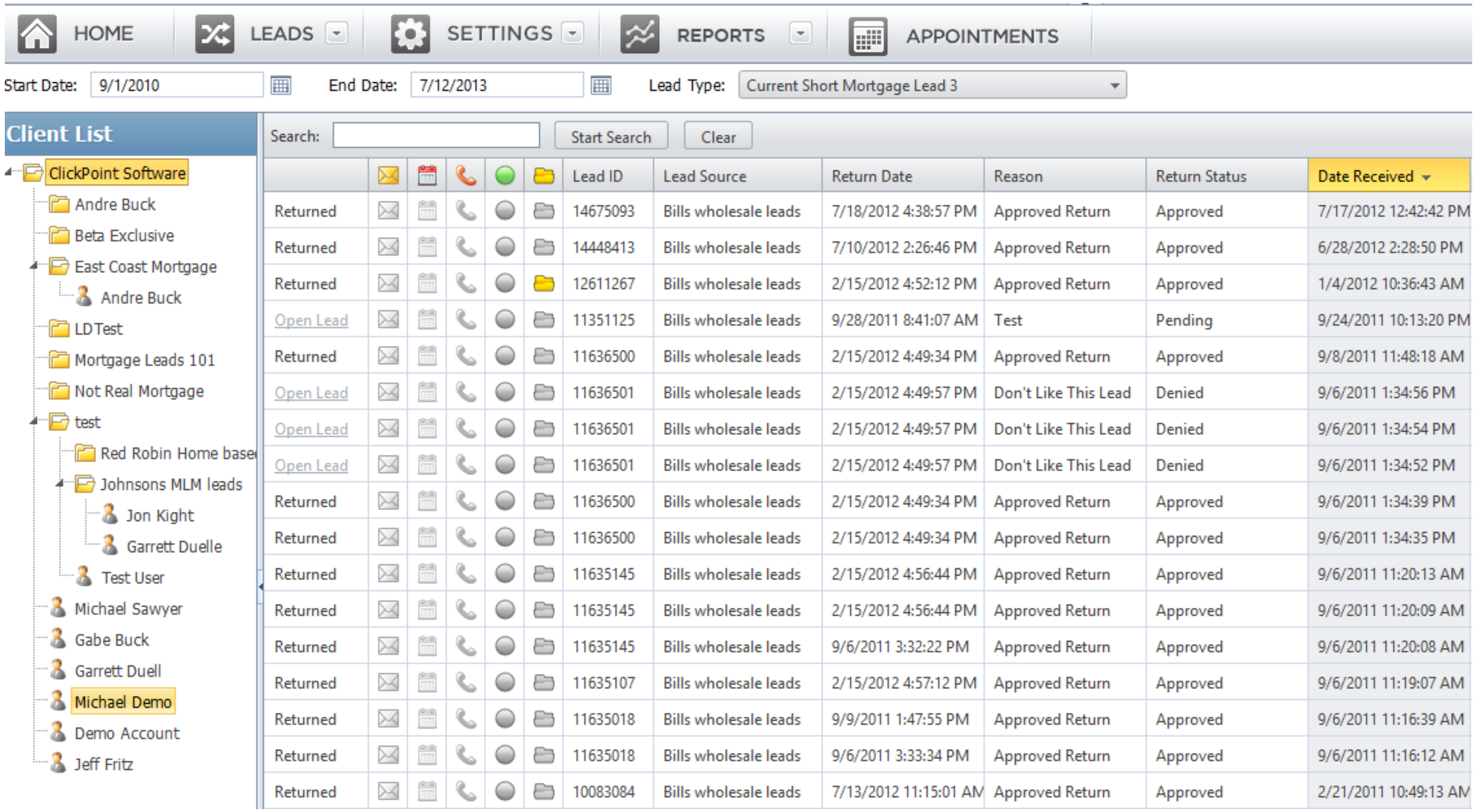
→ Show status of the lead (Returned or not)

→ Return Status(Approved, Denied Or Pending)

→ Return Date(Date the lead was returned)

→ Return Reason(Why you returned the lead)

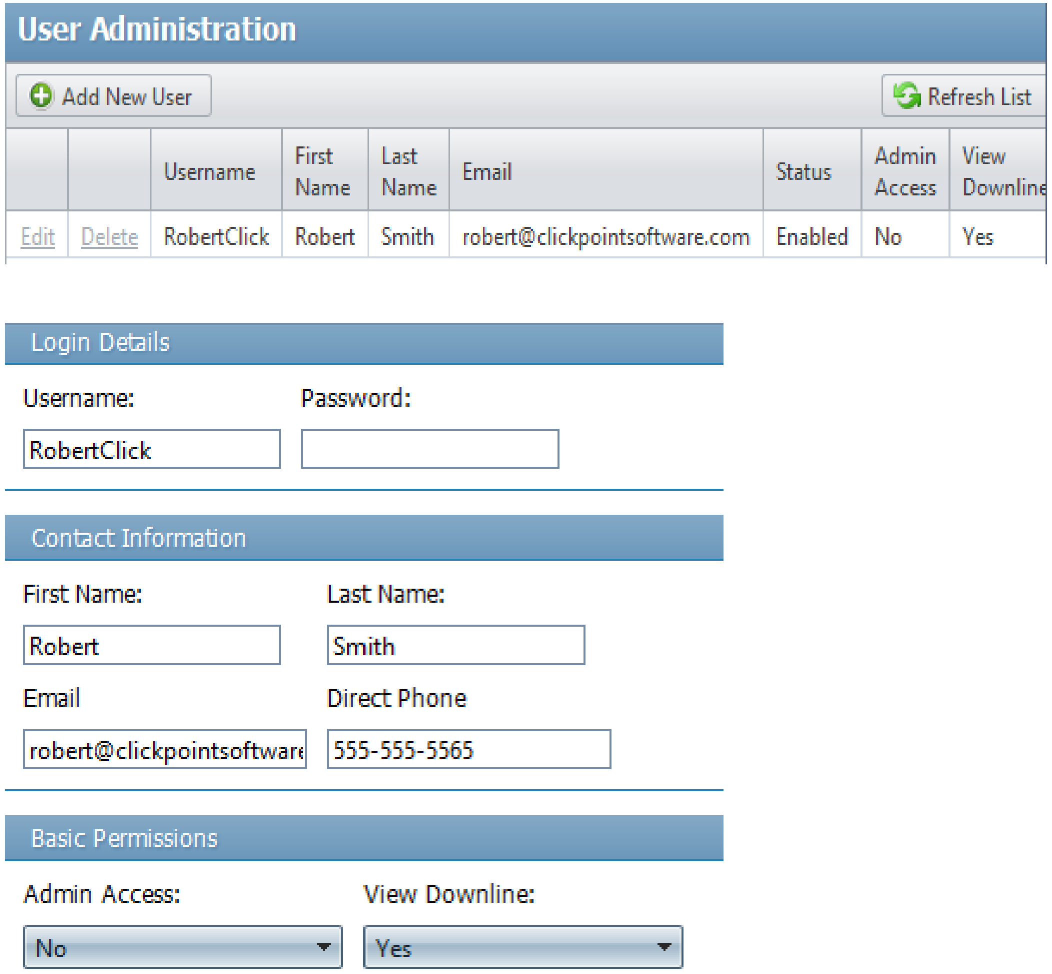
→ Simply Click on the leads Dropdown arrow to select *returns* in order to return any leads.



	Lead ID	Lead Source	Return Date	Reason	Return Status	Date Received
Returned	14675093	Bills wholesale leads	7/18/2012 4:38:57 PM	Approved Return	Approved	7/17/2012 12:42:42 PM
Returned	14448413	Bills wholesale leads	7/10/2012 2:26:46 PM	Approved Return	Approved	6/28/2012 2:28:50 PM
Returned	12611267	Bills wholesale leads	2/15/2012 4:52:12 PM	Approved Return	Approved	1/4/2012 10:36:43 AM
Open Lead	11351125	Bills wholesale leads	9/28/2011 8:41:07 AM	Test	Pending	9/24/2011 10:13:20 PM
Returned	11636500	Bills wholesale leads	2/15/2012 4:49:34 PM	Approved Return	Approved	9/8/2011 11:48:18 AM
Open Lead	11636501	Bills wholesale leads	2/15/2012 4:49:57 PM	Don't Like This Lead	Denied	9/6/2011 1:34:56 PM
Open Lead	11636501	Bills wholesale leads	2/15/2012 4:49:57 PM	Don't Like This Lead	Denied	9/6/2011 1:34:54 PM
Open Lead	11636501	Bills wholesale leads	2/15/2012 4:49:57 PM	Don't Like This Lead	Denied	9/6/2011 1:34:52 PM
Returned	11636500	Bills wholesale leads	2/15/2012 4:49:34 PM	Approved Return	Approved	9/6/2011 1:34:39 PM
Returned	11636500	Bills wholesale leads	2/15/2012 4:49:34 PM	Approved Return	Approved	9/6/2011 1:34:35 PM
Returned	11635145	Bills wholesale leads	2/15/2012 4:56:44 PM	Approved Return	Approved	9/6/2011 11:20:13 AM
Returned	11635145	Bills wholesale leads	2/15/2012 4:56:44 PM	Approved Return	Approved	9/6/2011 11:20:09 AM
Returned	11635145	Bills wholesale leads	9/6/2011 3:32:22 PM	Approved Return	Approved	9/6/2011 11:20:08 AM
Returned	11635107	Bills wholesale leads	2/15/2012 4:57:12 PM	Approved Return	Approved	9/6/2011 11:19:07 AM
Returned	11635018	Bills wholesale leads	9/9/2011 1:47:55 PM	Approved Return	Approved	9/6/2011 11:16:39 AM
Returned	11635018	Bills wholesale leads	9/6/2011 3:33:34 PM	Approved Return	Approved	9/6/2011 11:16:12 AM
Returned	10083084	Bills wholesale leads	7/13/2012 11:15:01 AM	Approved Return	Approved	2/21/2011 10:49:13 AM

Settings -> User Manager Screen

- → Allows you to add multiple users to the system
- → Click *ADD NEW USER*
- → Assign a Username and Password
- → Put in Contact Information
- → Provide Basic Permissions
- → Admin access can do everything
- → View Down line allows someone to see all the leads "below" them.
- → Status – enabled Use this item to Enable or Disable a User



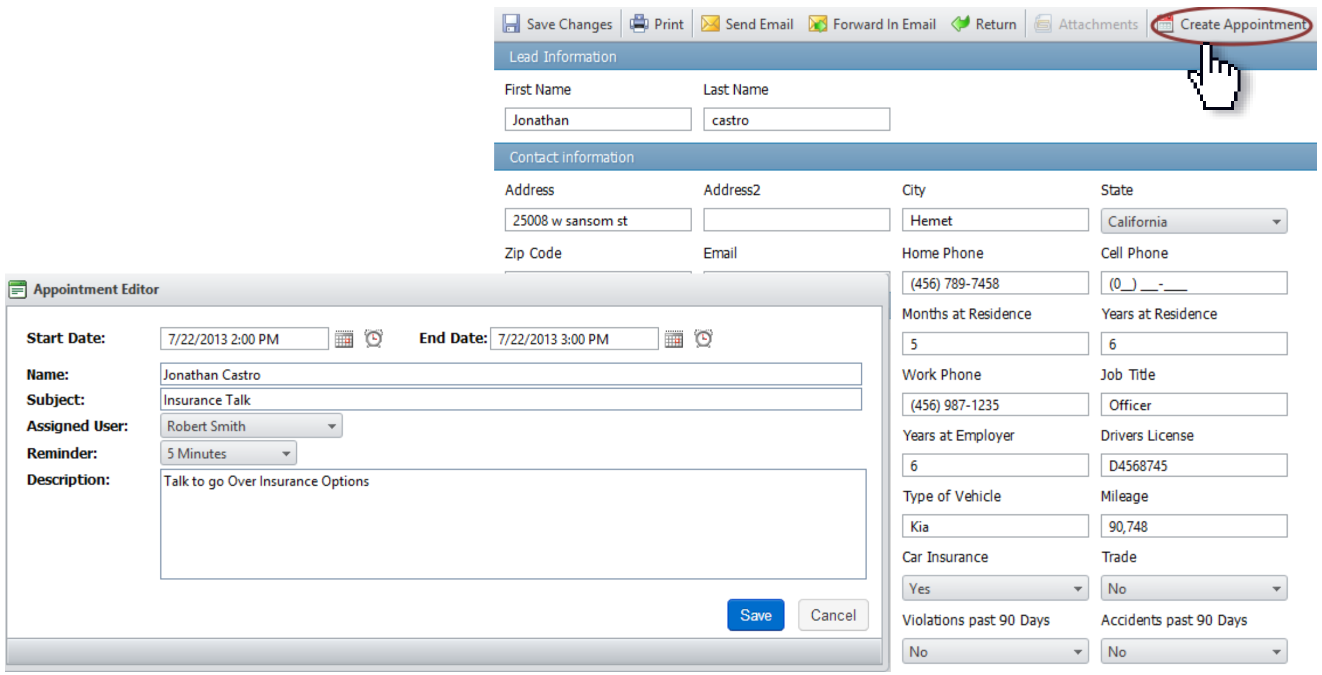
Creating Appointments

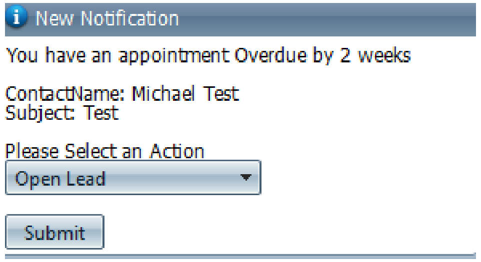
→ You can only create appointments from within a lead. Open the lead, and then select the *create appointment* button .

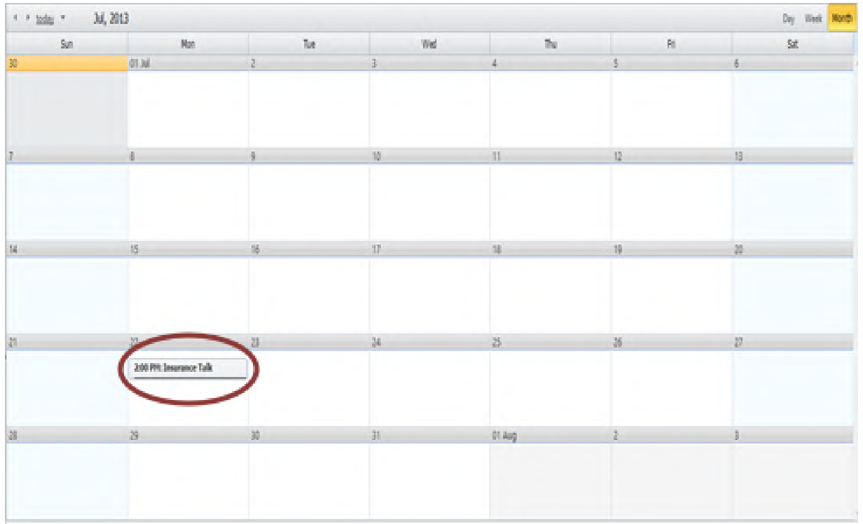
→ You can assign the appointment to any user of the system. They will receive an email of the appointment.

→ Users can see their appointments, and admins can see ALL appointments in the Appointments tab.

→ Leads that are past their Appointment date will also display a notification.





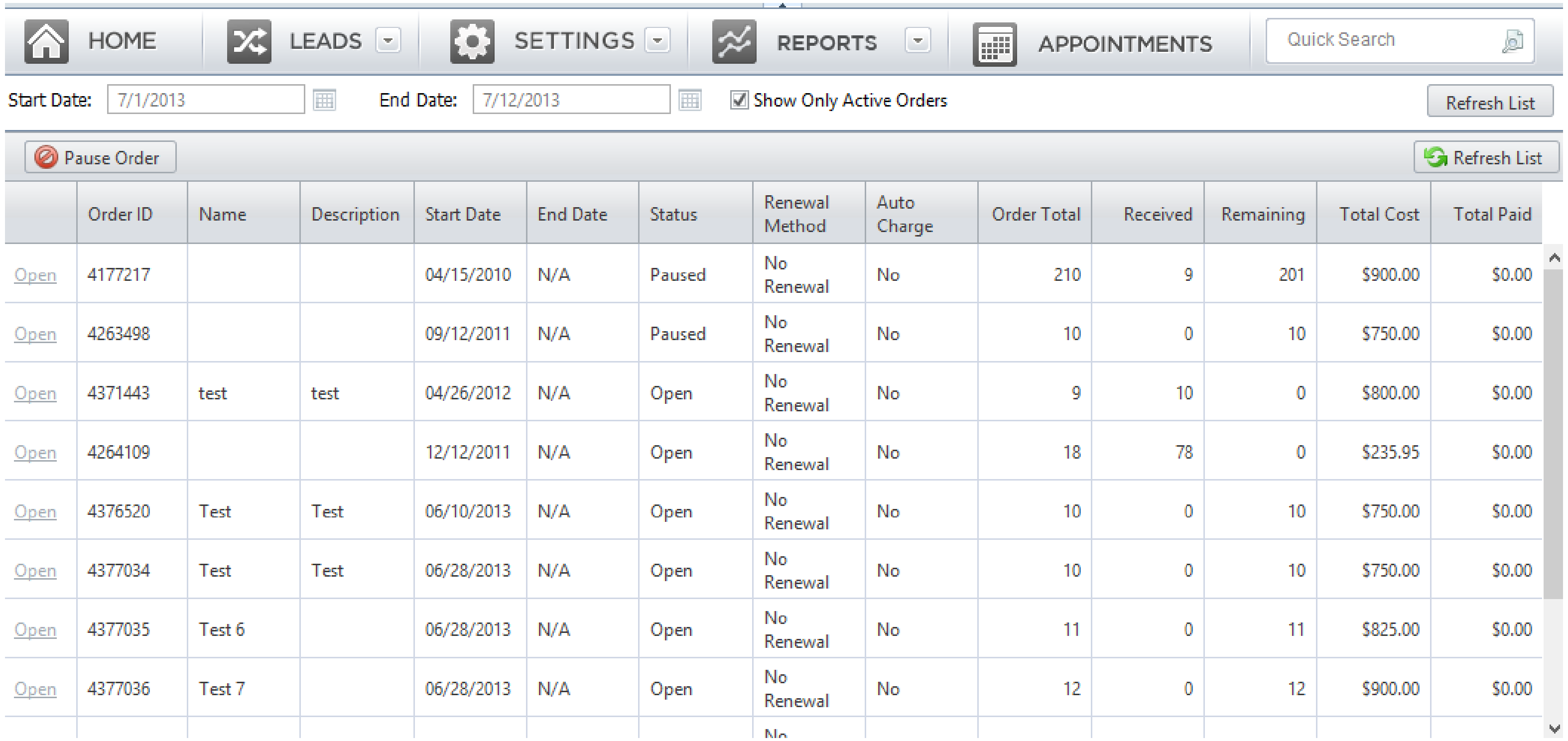


Leads -> Order Manager

→ Within the client portal your Client has access to edit and view all orders, as well as the ability to pause any open orders,

→ They can see the following:

- Order ID
- Start Date
- End Date
- Status(Whether open or closed)
- Renewal
- Auto Charge
- Order Total
- Amount Received
- Remaining
- Cost
- Amount Paid



	Order ID	Name	Description	Start Date	End Date	Status	Renewal Method	Auto Charge	Order Total	Received	Remaining	Total Cost	Total Paid
Open	4177217			04/15/2010	N/A	Paused	No Renewal	No	210	9	201	$900.00	$0.00
Open	4263498			09/12/2011	N/A	Paused	No Renewal	No	10	0	10	$750.00	$0.00
Open	4371443	test	test	04/26/2012	N/A	Open	No Renewal	No	9	10	0	$800.00	$0.00
Open	4264109			12/12/2011	N/A	Open	No Renewal	No	18	78	0	$235.95	$0.00
Open	4376520	Test	Test	06/10/2013	N/A	Open	No Renewal	No	10	0	10	$750.00	$0.00
Open	4377034	Test	Test	06/28/2013	N/A	Open	No Renewal	No	10	0	10	$750.00	$0.00
Open	4377035	Test 6		06/28/2013	N/A	Open	No Renewal	No	11	0	11	$825.00	$0.00
Open	4377036	Test 7		06/28/2013	N/A	Open	No Renewal	No	12	0	12	$900.00	$0.00

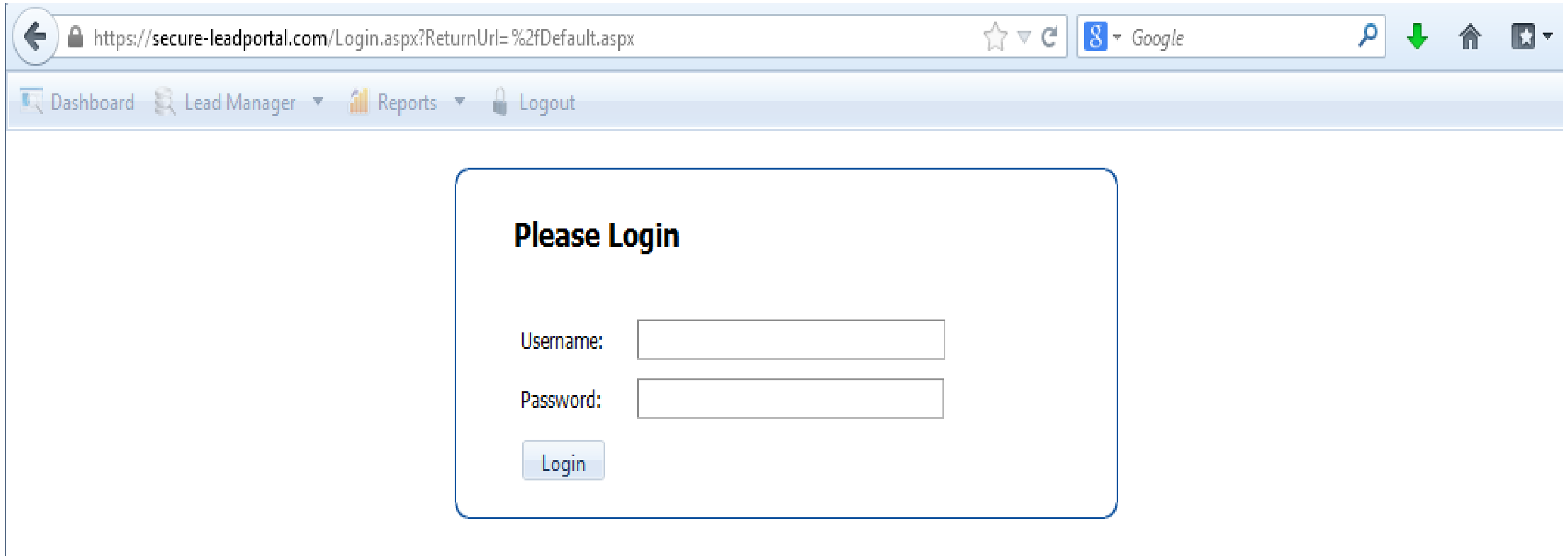
F.A.Q.

- Q. How do I get to the back office?
  - A. the URL is www.lead-backoffice.com
- Q. Can I customize the Client Portal URL?
  - A. Yes, you can use either a custom domain by pointing your domain DNS to this IP Address 208.115.114.14
    - *Note* this requires you to set up your domain under Settings, then opening web portal options*
  - Second option is to use a subdomain. Once again this is done under Settings web portal option, i.e. Leads.lead-backoffice.com
- Q. Can I remove the training video?
  - A. The training Video cannot be removed at this time.
- Q. How do I edit the Company News Section?
  - A. You can edit your company news section by going to Settings Tab on the top -> Web Portals - > Edit Company News Section

Using Your Vendor Portal

The Vendor Portal allows Lead Exec users the ability to give their Sources access to view their leads without actually entering Lead Exec.

For your Vendors to log in please visit www.secure-leadportal.com



Using Your Vendor Portal

Dashboard

→ The Vendor Portal Dashboard will be where you can view a quick summary of the following items concerning your leads.

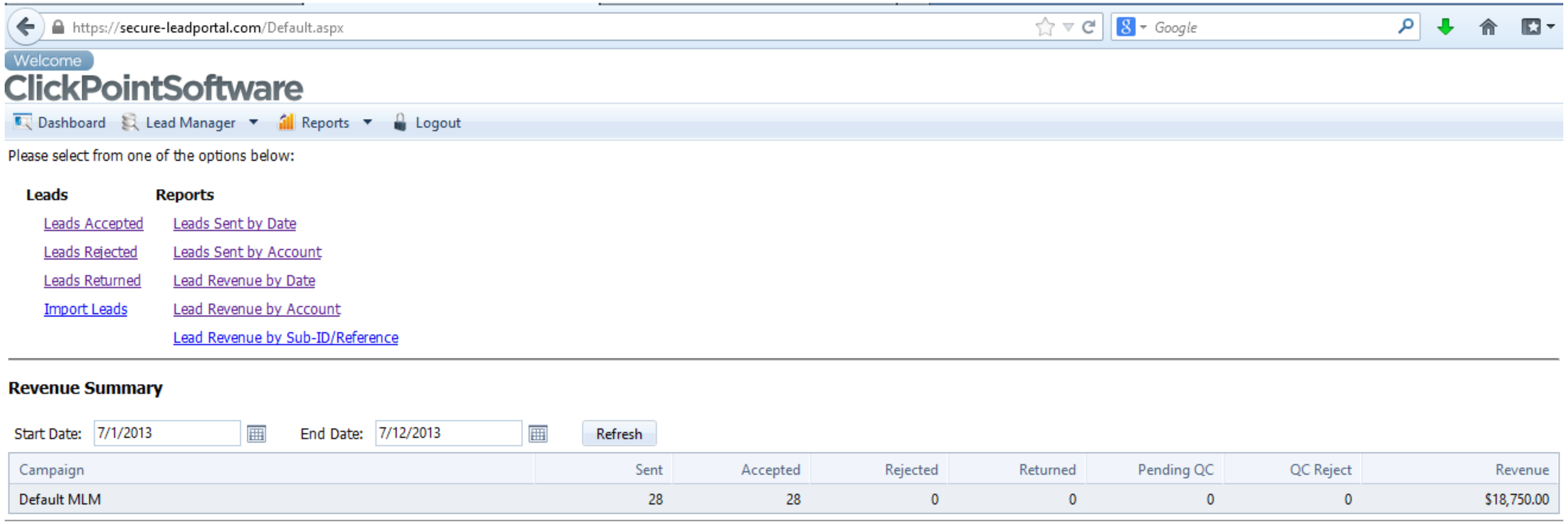
- Sent
- Accepted
- Rejected
- Returned
- Pending QC
- QC Reject
- Revenue

→ You can also choose to view leads in only the following formats.

- Leads Accepted
- Leads Rejected
- Leads Returned.

→ The Dashboard also allows you to view reports.

- Leads Sent By Date
- Leads Sent By Account
- Lead Revenue by Date
- Lead Revenue by Account
- Lead Revenue by Sub Id/Reference.



Lead Manager

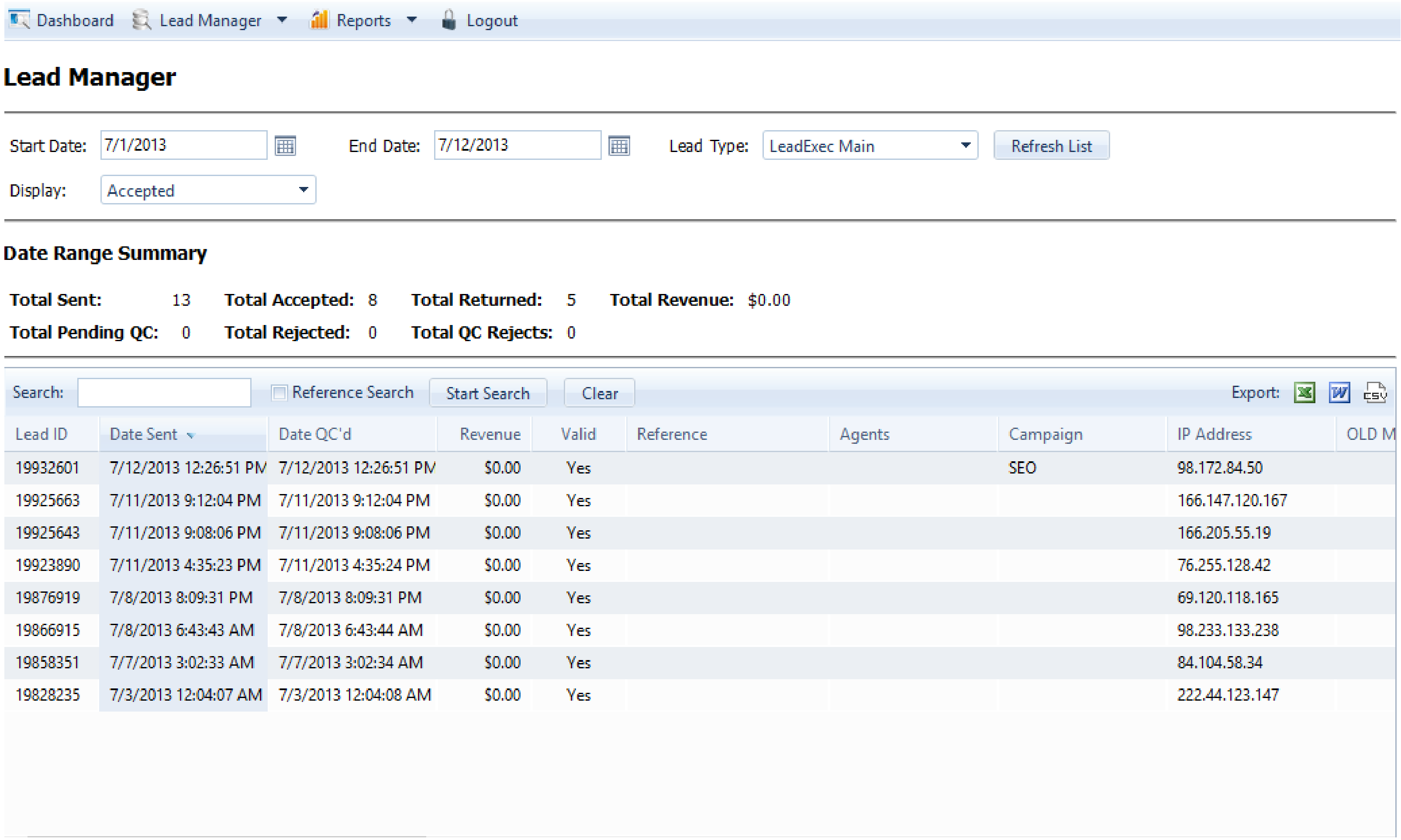
→ The Lead Manager is where you can view your specific leads via a set date range.

→ This Screen will allow you to display information pertaining to:

- Lead Type
- Accepted
- Rejected
- Pending and others.

→ This Screen is most useful for seeing leads that you have sent into the LeadExec System. It can provide revenue, as well as the lead ID.

→ Lastly, export any of this data via Excel, Word or CSV



Dashboard Lead Manager Reports Logout

Lead Manager

Start Date: 7/1/2013 End Date: 7/12/2013 Lead Type: LeadExec Main Refresh List

Display: Accepted

Date Range Summary

Total Sent: 13 **Total Accepted:** 8 **Total Returned:** 5 **Total Revenue:** $0.00

Total Pending QC: 0 **Total Rejected:** 0 **Total QC Rejects:** 0

Search: Reference Search Start Search Clear Export:

Lead ID	Date Sent	Date QC'd	Revenue	Valid	Reference	Agents	Campaign	IP Address	OLD M
19932601	7/12/2013 12:26:51 PM	7/12/2013 12:26:51 PM	$0.00	Yes			SEO	98.172.84.50	
19925663	7/11/2013 9:12:04 PM	7/11/2013 9:12:04 PM	$0.00	Yes				166.147.120.167	
19925643	7/11/2013 9:08:06 PM	7/11/2013 9:08:06 PM	$0.00	Yes				166.205.55.19	
19923890	7/11/2013 4:35:23 PM	7/11/2013 4:35:24 PM	$0.00	Yes				76.255.128.42	
19876919	7/8/2013 8:09:31 PM	7/8/2013 8:09:31 PM	$0.00	Yes				69.120.118.165	
19866915	7/8/2013 6:43:43 AM	7/8/2013 6:43:44 AM	$0.00	Yes				98.233.133.238	
19858351	7/7/2013 3:02:33 AM	7/7/2013 3:02:34 AM	$0.00	Yes				84.104.58.34	
19828235	7/3/2013 12:04:07 AM	7/3/2013 12:04:08 AM	$0.00	Yes				222.44.123.147	

Reports

Leads Sent by Date

The Leads Sent by Date report is useful for informing you how many leads were sent in during a date range. This report will display leads across all lead types, as well as a date range via a chart graph to let you know whether leads were accepted or put into the QC. This report will also tell you if leads were rejected, or are pending validation. You can also generate a report showing just a normal numbers graph with totals.

Report Options

Maximum Date Range: 60 Days

Start Date: 7/1/2013 End Date: 7/12/2013 Lead Type: All Lead Types

Refresh Report

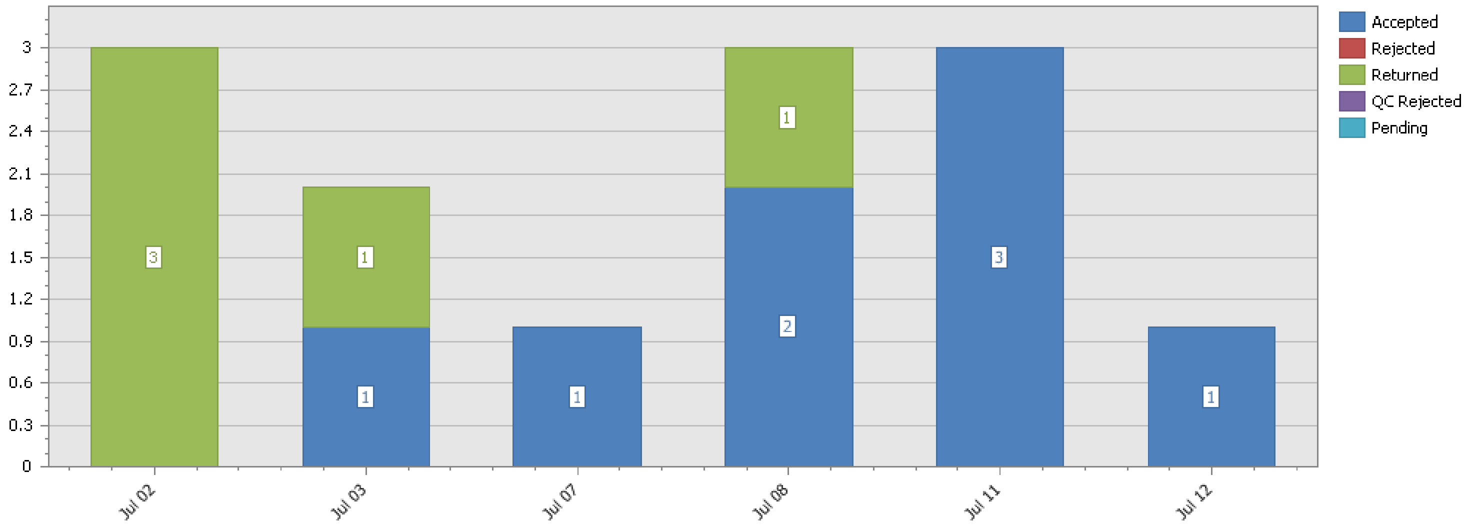
Leads Sent by Date

Dates Selected: 7/1/2013 through 7/12/2013

ClickPoint Software
Solution to power your business

All Lead Types

Sent by Date Breakdown



Date:	Accepted:	Rejected:	Returned:	QC Rejected:	Pending:	Total:
Tuesday, July 02, 2013	0	0	3	0	0	3
Wednesday, July 03, 2013	1	0	1	0	0	2
Sunday, July 07, 2013	1	0	0	0	0	1
Monday, July 08, 2013	2	0	1	0	0	3

Friday, July 12, 2013 04:50 PM

Page 1 of 2

Reports

Leads Sent by Account

The Leads Sent By Account report is useful for lead sources who have multiple accounts. This will tell you per account how many leads were accepted, returned, rejected, and total leads for the date range.

Report Options Maximum Date Range: 60 Days

Start Date: 7/1/2013 End Date: 7/12/2013 Lead Type: All Lead Types Refresh Report

Leads Sent by Account

ClickPoint Software
Solution to power your business

Dates Selected: 7/1/2013 through 7/12/2013

All Lead Types

Account: Best Lead Distribution

Date:	Accepted:	Returned:	QC Rejected:	Pending:	Total:
Wednesday, July, 03 2013 12:00 AM	1	1	0	0	2
Sunday, July, 07 2013 12:00 AM	1	0	0	0	1
Monday, July, 08 2013 12:00 AM	2	1	0	0	3
Thursday, July, 11 2013 12:00 AM	3	0	0	0	3
Friday, July, 12 2013 12:00 AM	1	0	0	0	1
Total: Best Lead Distribution	**8**	**2**	**0**	**0**	**10**
Grand Total:	**8**	**2**	**0**	**0**	**10**

Reports

Leads Revenue by Date

The leads revenue by date report is the report you will use to see how much revenue your sources have made to date on a per day basis.

Report Options Maximum Date Range: 60 Days

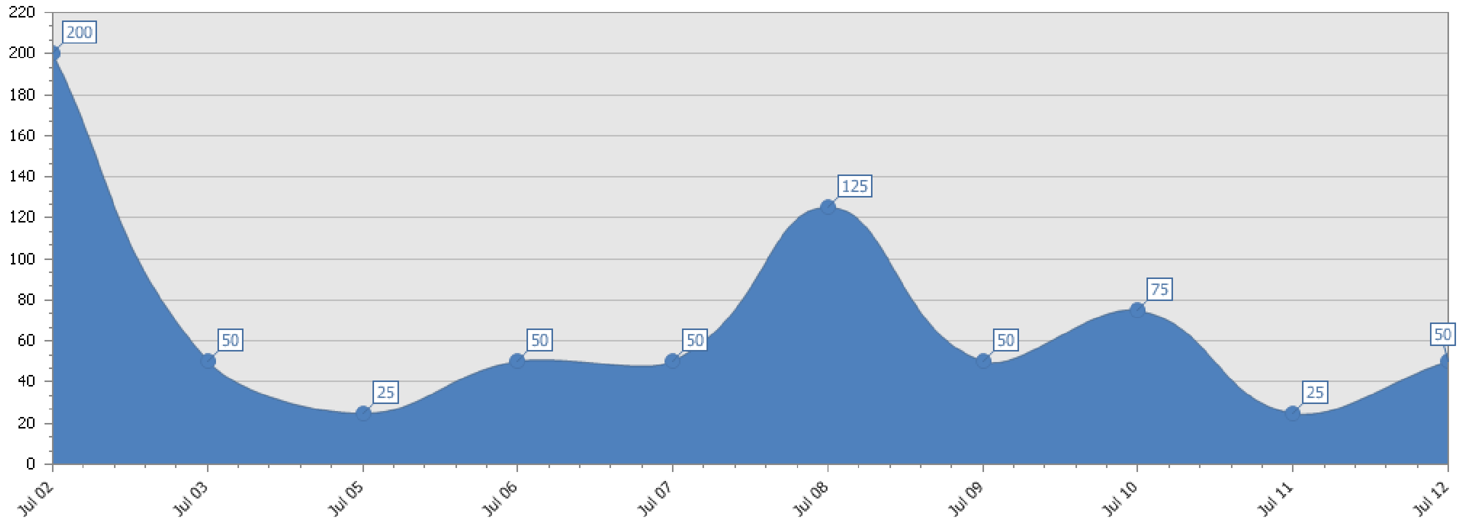
Start Date: 7/1/2013 End Date: 7/12/2013 Lead Type: All Lead Types Refresh Report

Leads Revenue by Date

Dates Selected: 7/1/2013 through 7/12/2013

All Lead Types

Revenue by Date Breakdown



Date:	Lead Count:	Revenue:
Tuesday, July, 02 2013 12:00 AM	8	$200.00
Wednesday, July, 03 2013 12:00 AM	2	$50.00
Friday, July, 05 2013 12:00 AM	1	$25.00
Saturday, July, 06 2013 12:00 AM	2	$50.00
Sunday, July, 07 2013 12:00 AM	2	$50.00

Friday, July 12, 2013 04:58 PM Page 1 of 2

Reports

Leads Revenue by Account

This report will show you the revenue on a per account basis as well as lead counts and totals.

Report Options Maximum Date Range: 60 Days

Start Date: 7/1/2013 End Date: 7/12/2013 Lead Type: All Lead Types Refresh Report

Revenue by Account

Dates Selected: 7/1/2013 through 7/12/2013

All Lead Types

Account: Default MLM

Date:	Lead Count:	Revenue:
Tuesday, July 02 2013 12:00 AM	8	$200.00
Wednesday, July 03 2013 12:00 AM	2	$50.00
Friday, July 05 2013 12:00 AM	1	$25.00
Saturday, July 06 2013 12:00 AM	2	$50.00
Sunday, July 07 2013 12:00 AM	2	$50.00
Monday, July 08 2013 12:00 AM	5	$125.00
Tuesday, July 09 2013 12:00 AM	2	$50.00
Wednesday, July 10 2013 12:00 AM	3	$75.00
Thursday, July 11 2013 12:00 AM	1	$25.00
Friday, July 12 2013 12:00 AM	2	$50.00
Total: Default MLM	28	$700.00
Grand Total:	**28**	**$700.00**

Revenue

Lead Count Total

F.A.Q.

- Q. How do I get to the Vendor Portal?
  - A. The Vendor Portal URL is www.secure-leadportal.com
- Q. Can I customize the Vendor Portal URL?
  - A. At this time there is no way to customize the vendor portal.
- Q. What is the client portal?
  - A. The client portal is a tool provided by us for your clients to view leads delivered to their system.
- Q. Where do I view the vendor portal username and password?
  - A. Opening your leadsource Inside of LeadExec will allow you to edit your vendors username and password.

Setting Up Client Portal Access

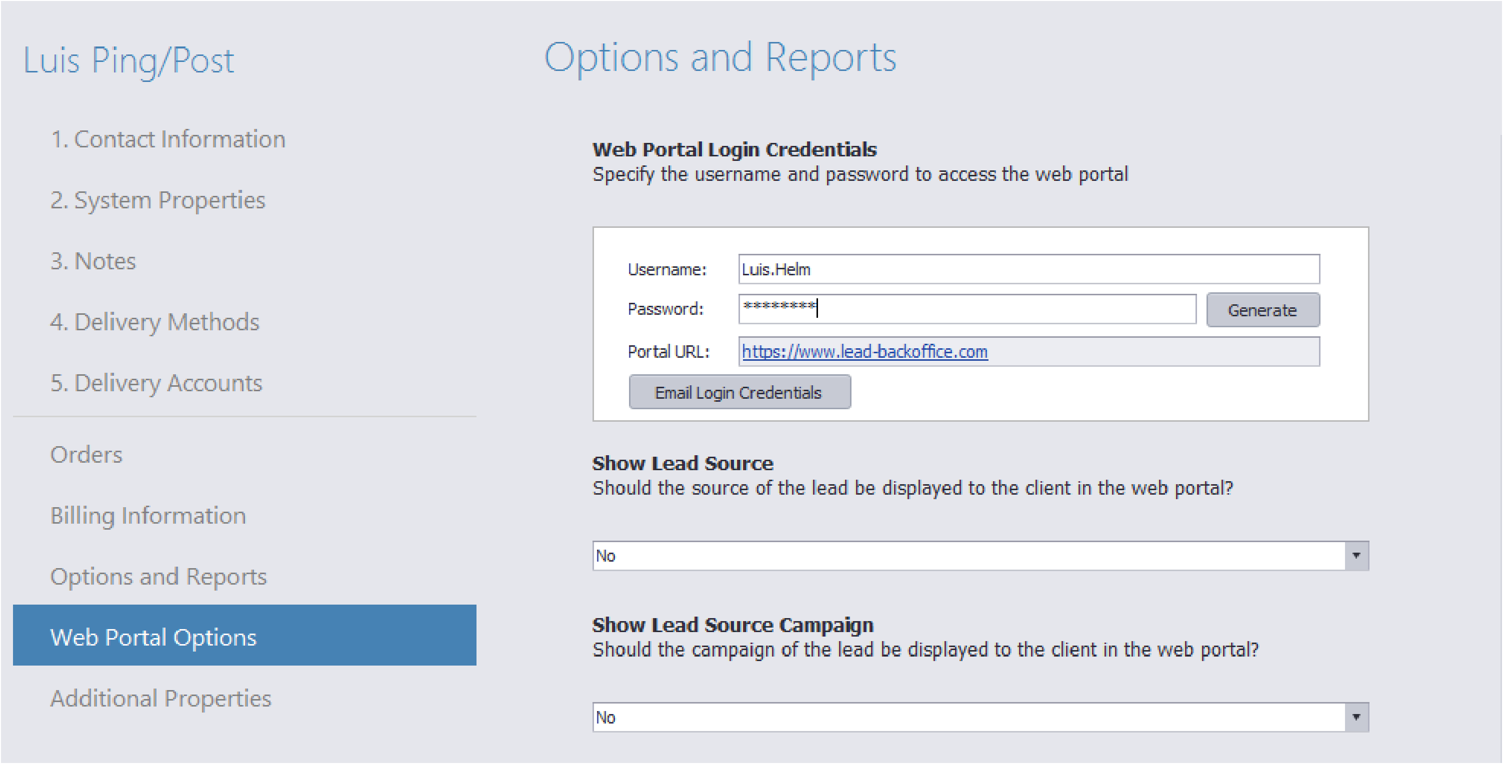
→ Giving your clients access to view their leads within the client portal is key for your clients to maintain leads. By giving them access to the client portal you are giving them the ability to monitor their received leads, schedule appointments, return leads and even run reports on leads that they received. To set up access for your clients to log into www.lead-backoffice.com first you must open your client.

→ Next Navigate to Web Portal Options

→ Insert Username and Password

NOTE: clicking the generate button will generate a random password.

→ Email your client their Login Credentials. Using the Email Login Credentials button will allow you to Email your client their Credentials to log into the client portal.



F.A.Q.

- Q. How do I get to the back office?
  - A. the URL is www.lead-backoffice.com
- Q. Can I customize the Client Portal URL?
  - A. Yes, you can use either a custom domain by pointing your domain DNS to this IP Address 208.115.114.14
    Note this requires you to set up your domain under Settings -> Web Portals.*
  - Second option is to use a subdomain. Once again this is done under *Settings* -> *web portal*
    Example Subdomain: Leads.lead-backoffice.com
- Q. What is the client portal?
  - A. The client portal is a tool provided by us for your clients to view leads delivered to their system.
- Q. What does Generate do?
  - A. Clicking Generate will generate a random password.
- Q. How do I get my client their credentials?
  - A. Click on the email credentials icon to email your client their username and password.

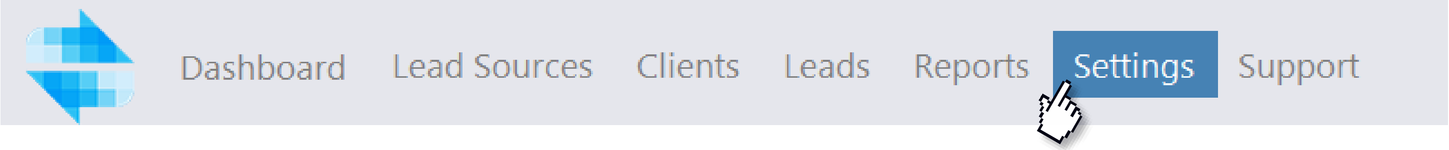
Configuring Client Portal

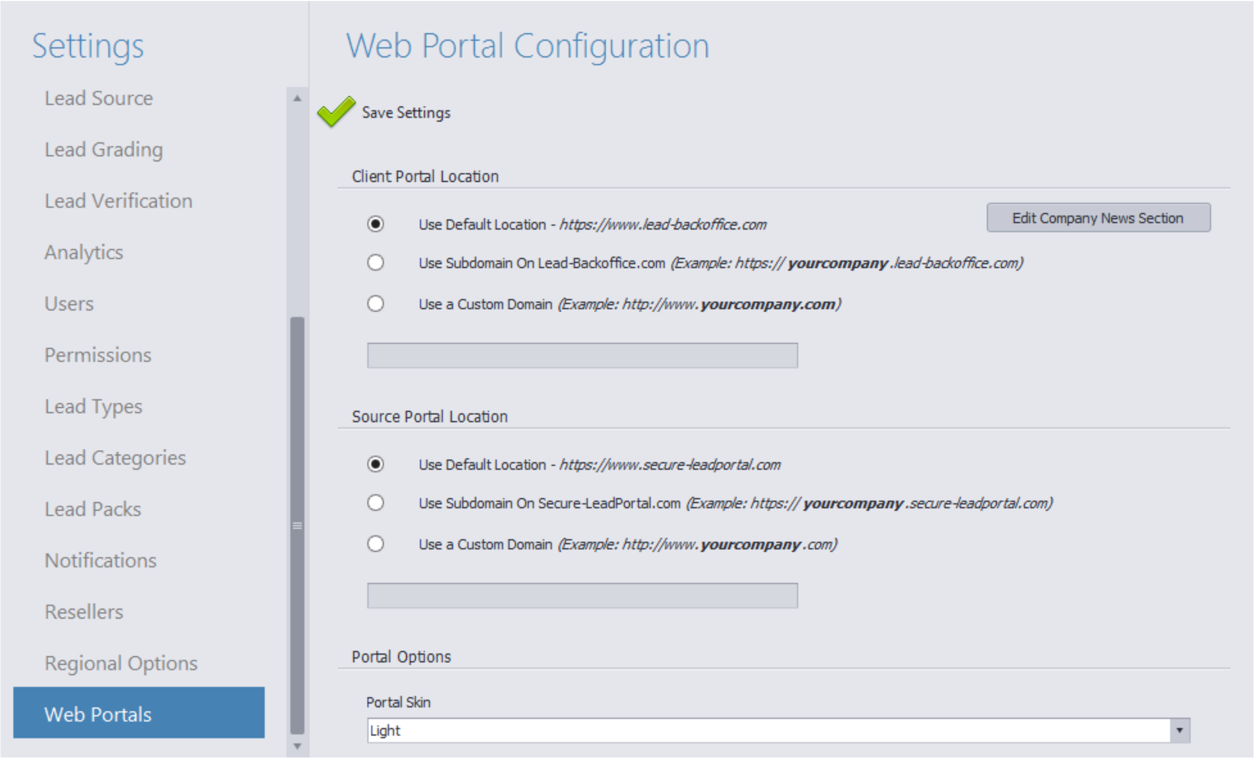
→ To customize your Client Portal Click on the *Settings* Tab.

→ Select web Portals

→ By Default the portal URLS are
  www.lead-backoffice.com
  www.secure-leadportal.com

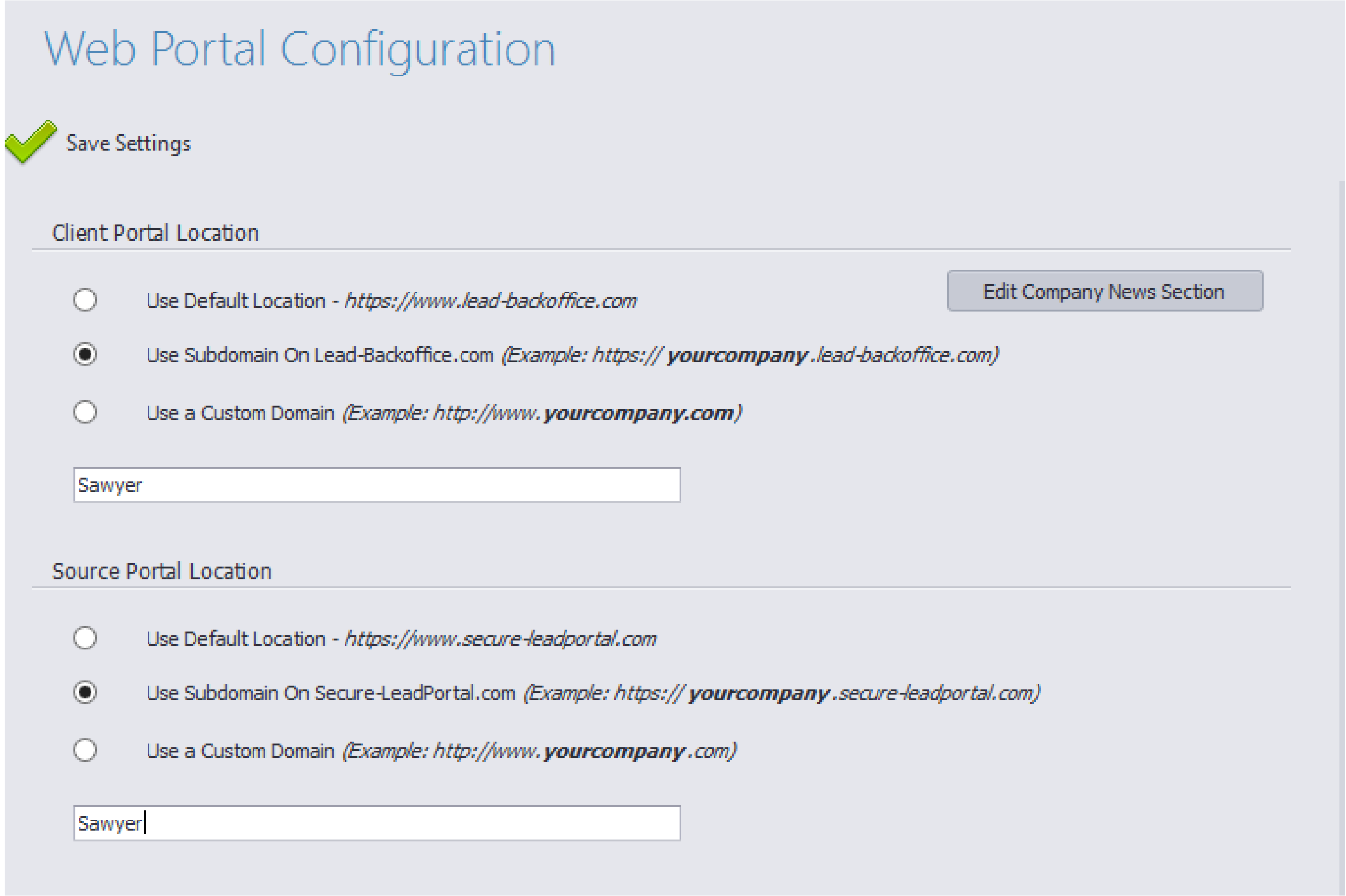
→ Portal Skin, allows you to change the tone of the client portal that your users log into.





Using a sub-domain

- LeadExec Gives users the ability to use a subdomain provided by clickpoint software by inputting a name before the lead back office portion.
- For Example the following URLS would now be listed as
  - www.sawyer.lead-backoffice.com
  - www.Sawyer.secure-leadportal.com



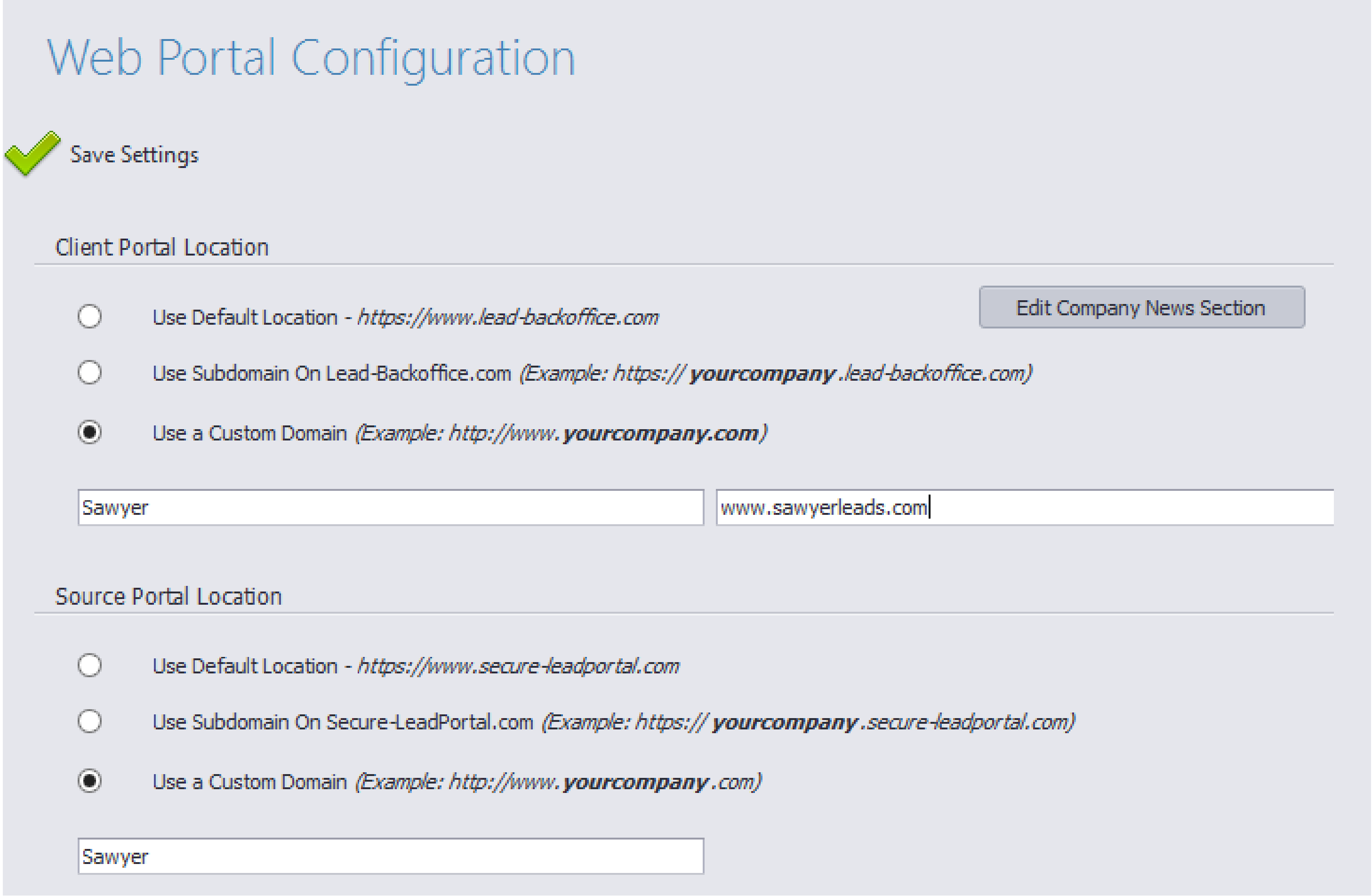
Using your own domain

→ LeadExec also gives you the ability to use your own domain provided you own it, to do so select the Use Custom Domain first.

→ Next put the domain name this will be hosted on.

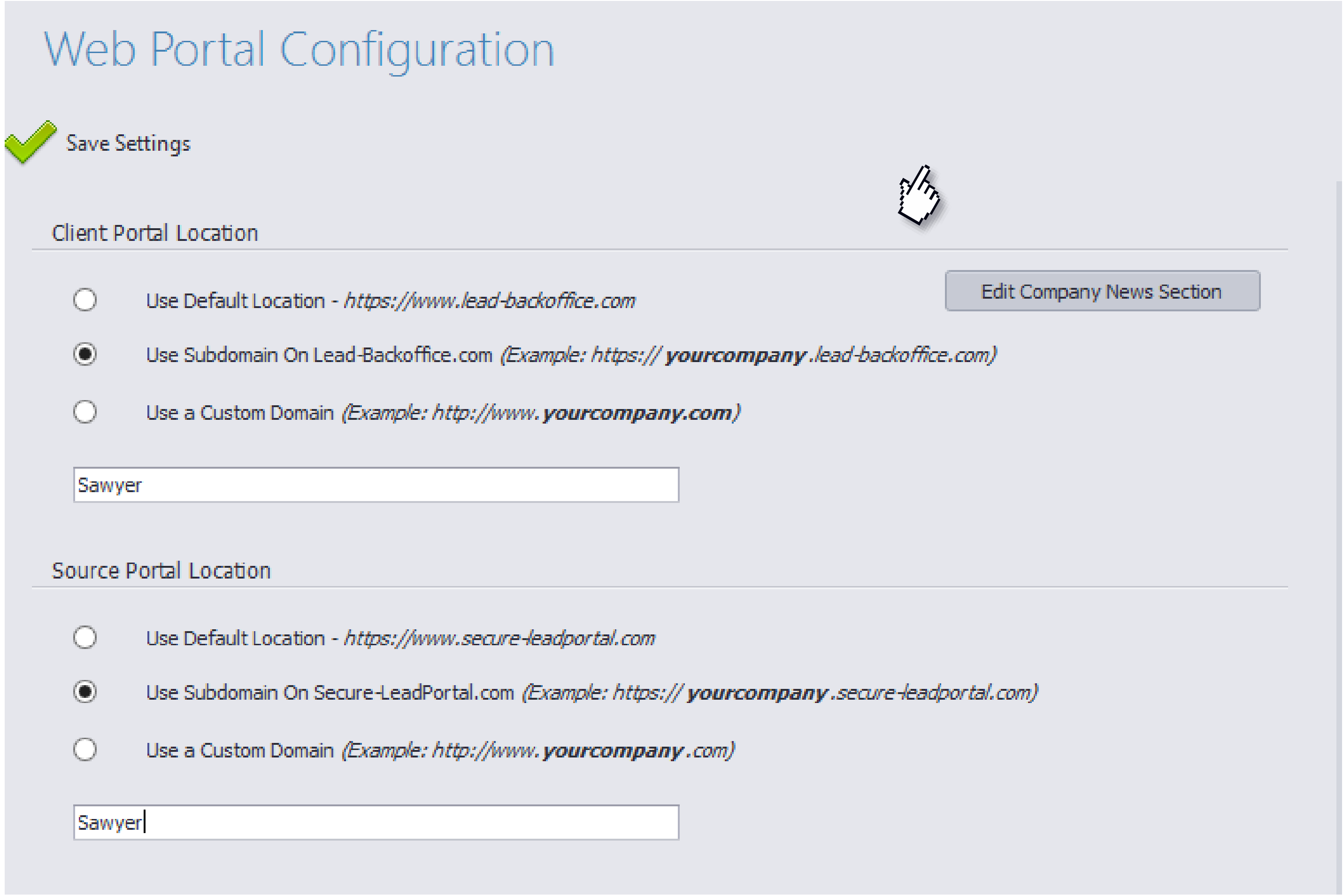
→ Enter in the URL to be used.

→ Point your DNS record to this IP Address 208.115.112.14



Configuring Client News

→ You can customize the Client News Section of your client portal by clicking on the Edit Company News Section. This will open an HTML editor where you can input a custom message for your clients to see.



F.A.Q.

→ Q. Where do I go to change my client portal logo?
  → A. Logos will be changed under Settings -> General Preferences

→ Q. Where do I assign my client their username and password?
  → A. Username and Passwords are assigned under Web Portals in client setup

→ Q. What does a subdomain do?
  → A. Allows you to slightly customize your portal name, however still requires use of lead-backoffice.com at its heart.

→ Q. Can I use my own Domain?
  →A. Yes, you can use your own domain.

You must be able to point your A record to the following IP Address: 208.115.112.14

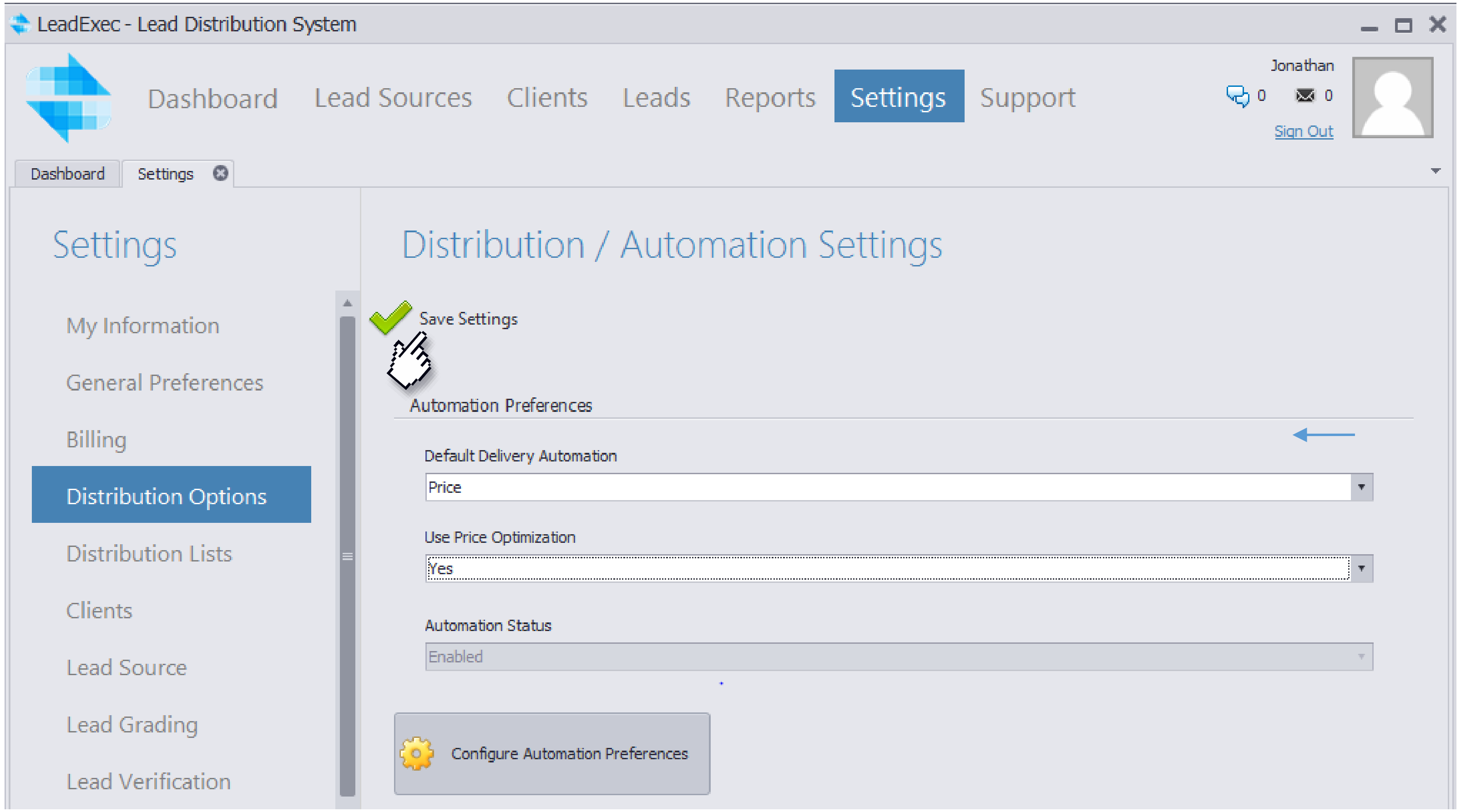
Client Distribution Options

→ Client Distribution options in LeadExec allow you to change the way automation works for your entire system. The base defaults we have are

- Price
- Weighted
- Percentage
- Round Robin
- Priority.

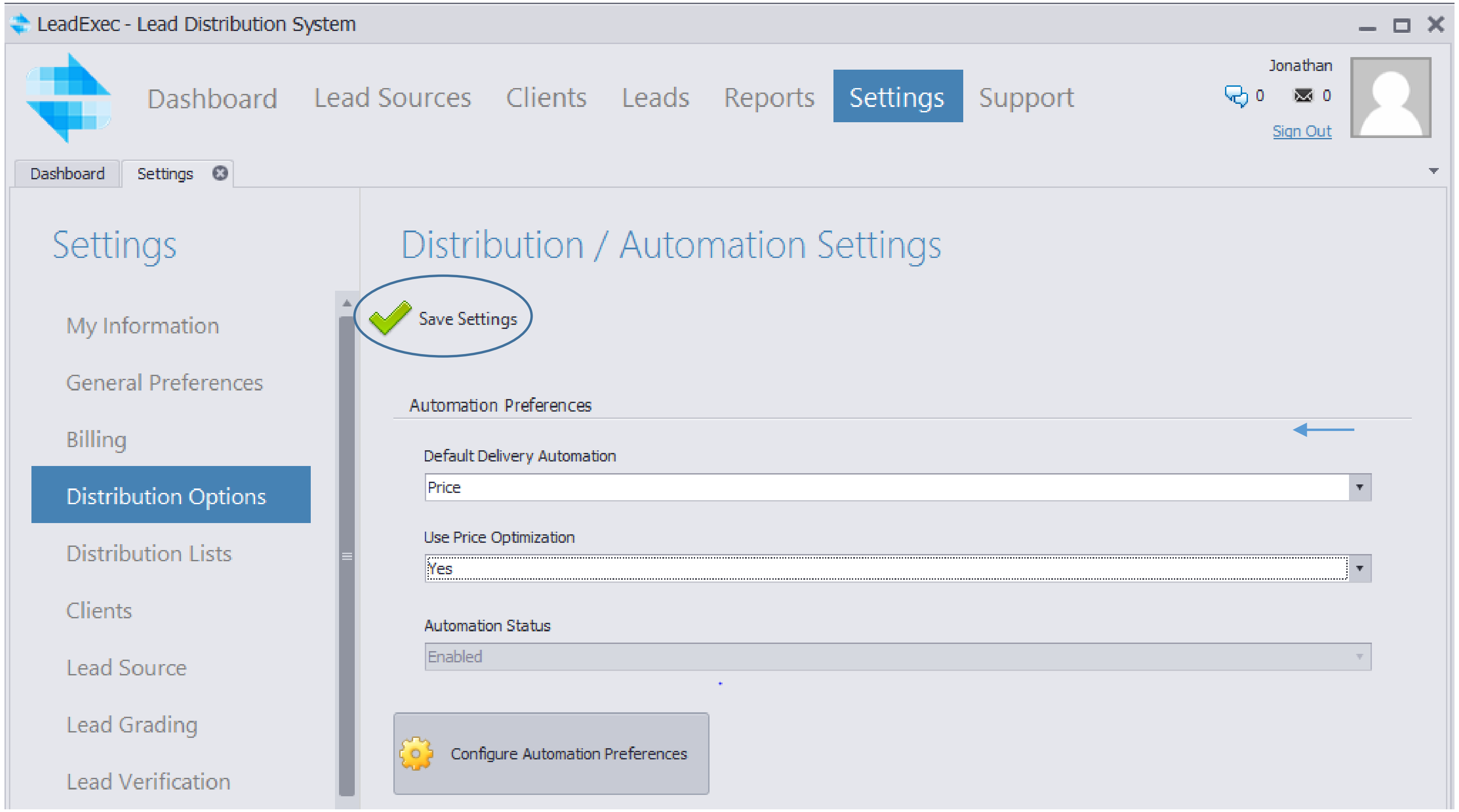
→ To set Automation Settings, Select the Default Delivery Dropdown and Select an option.

→ Click *Save Settings*.

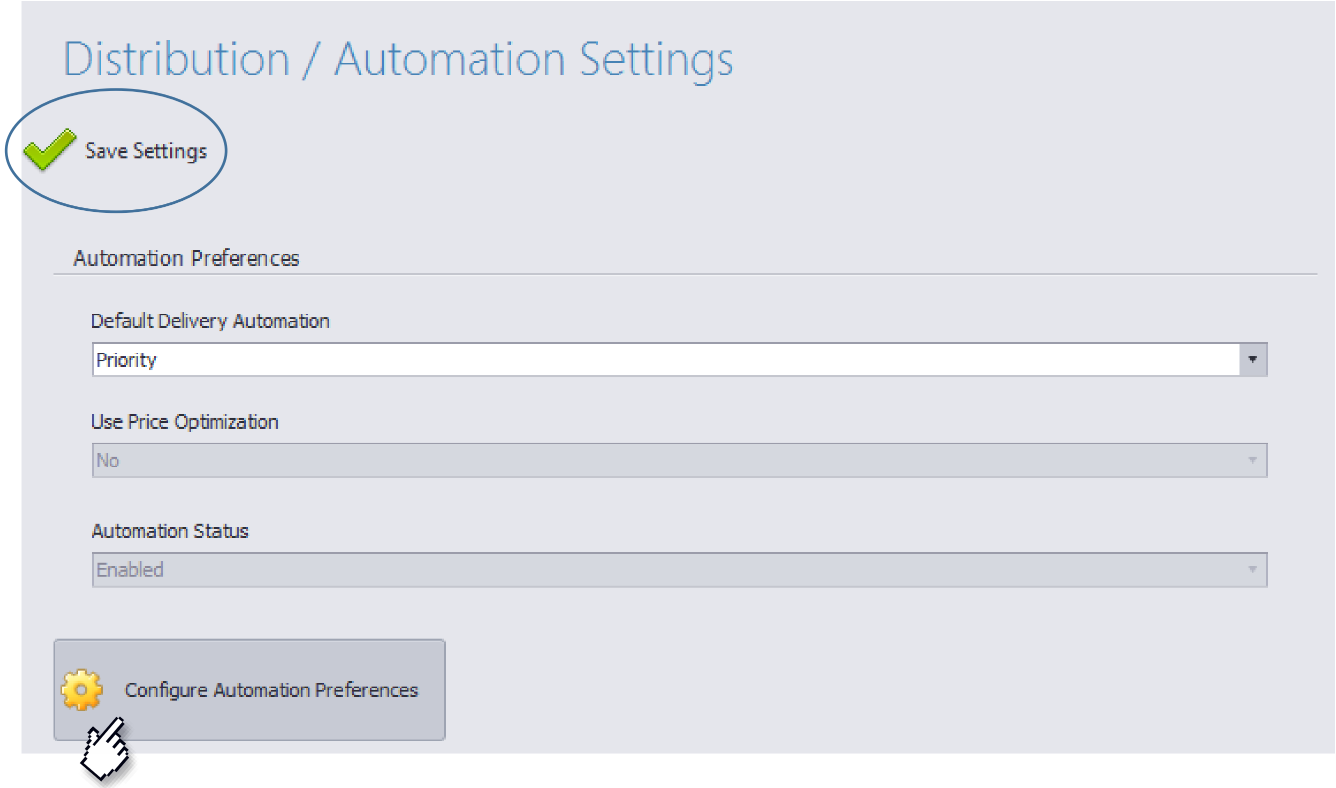


Price Automation

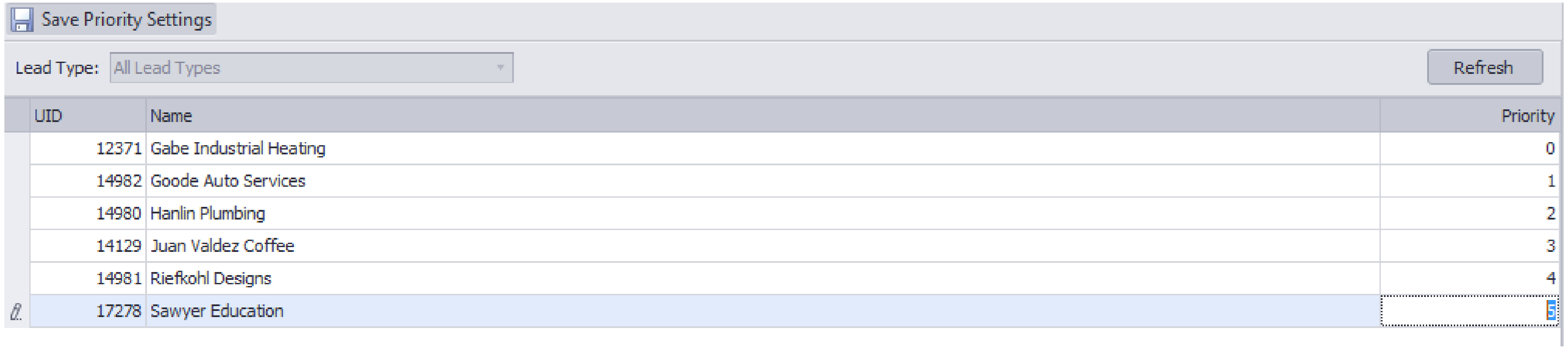
- Price Automation Works by Taking into account the price listed on your delivery accounts and ordering the client in order of highest to lowest.
- Price Optimization
  - If this option is set to yes, the system will take into account which client pays the most when sending the lead.
- *Note* Price Automation does not have any Automation Preferences.*



Priority Automation



- → Priority automation allows you to give your clients a priority order that is enforced when a lead enters the system.
- → Click on *Configure Automation Preferences* to save your changes and edit your priority.
- → Priority is Determined with 0 being the highest priority. Anything higher than 0 is deemed a lower priority. For example, if a lead were to come into the system right now, the order our clients would be scanned is:
- → 0,1,2,3,4,5.



UID	Name	Priority
12371	Gabe Industrial Heating	0
14982	Goode Auto Services	1
14980	Hanlin Plumbing	2
14129	Juan Valdez Coffee	3
14981	Riefkohl Designs	4
17278	Sawyer Education	5

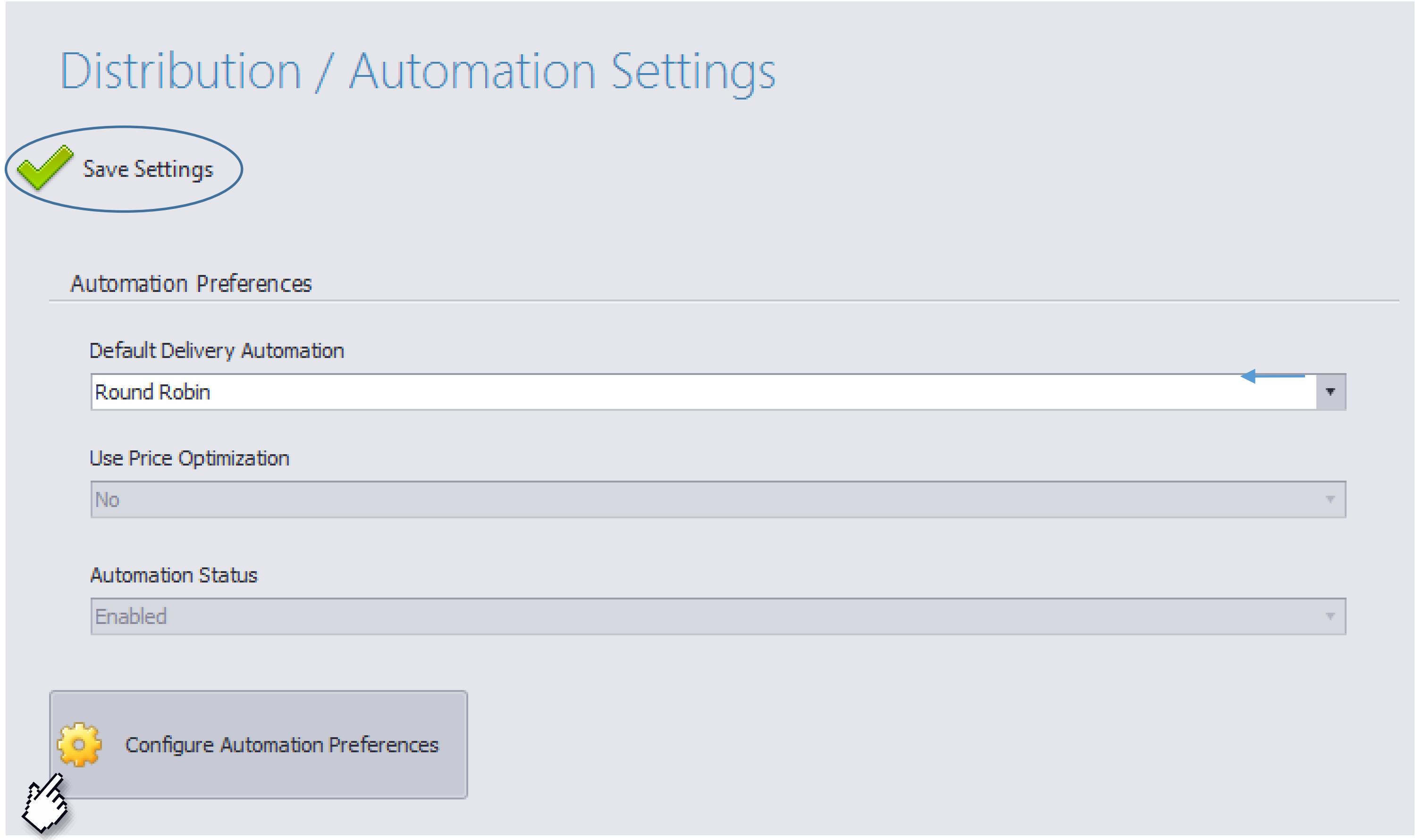
Round Robin

→ Round Robin Delivery will ensure that the clients receive leads in sequential order ensuring that the leads are evenly distributed, for example:

→ You have 3 clients.
  - A
  - B
  - C

→ As leads come into the system it will evenly distribute between the clients. for example during this time, 5 leads have entered your system. This is how they distributed
  - A II
  - B II
  - C I

→ *Note* round robin does not have a configure automation preference item. Click save settings to implement Round Robin.*



Weighted

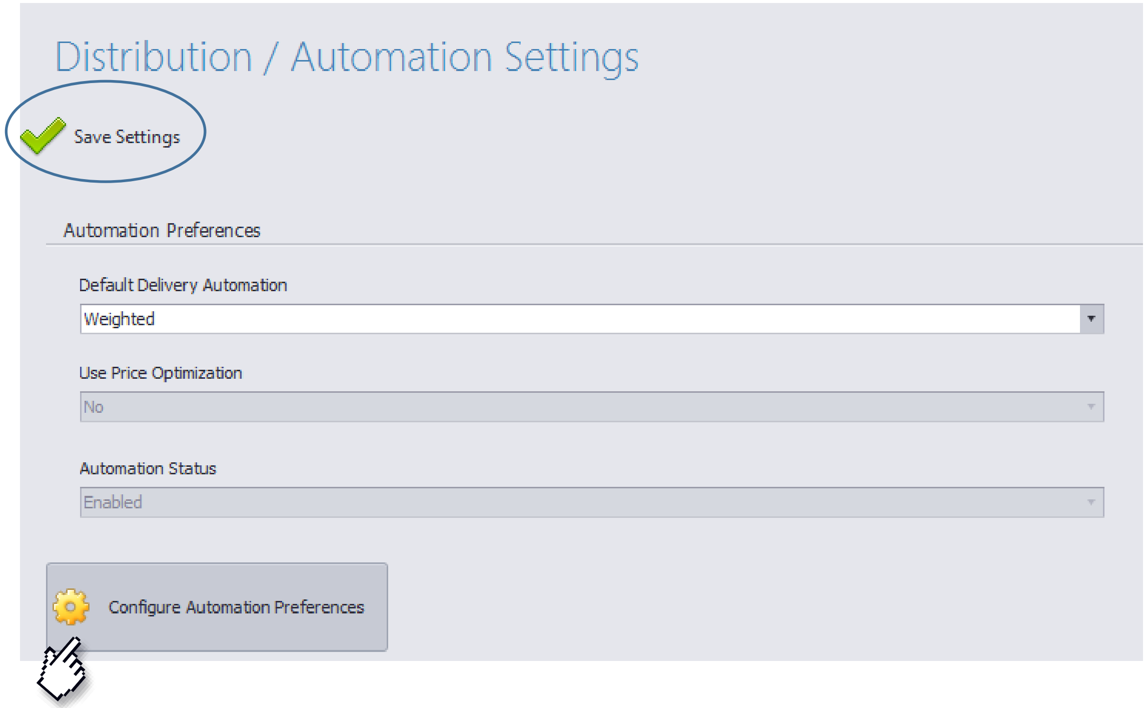
→ Weighted distribution allows you to set weights on each client which determines how many leads they should receive. The percentage of leads a particular client receives goes up and down depending on time frame.

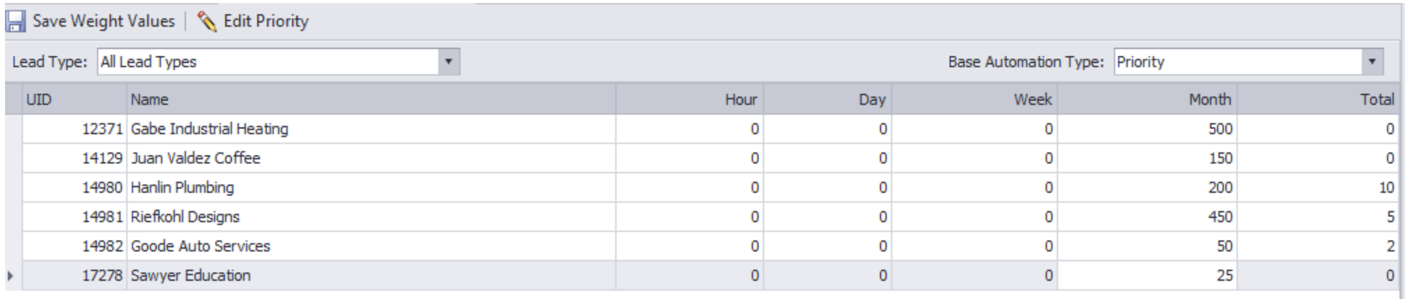
→ Click on *Configure Automation Preferences* save your changes and edit your weights

→ Base automation Type:

  → If two clients share the same weight the system will determine who gets the lead by the base automation type. You can choose to have the sytem look at the clients via

  - Priority
  - Round Robin
  - Price.





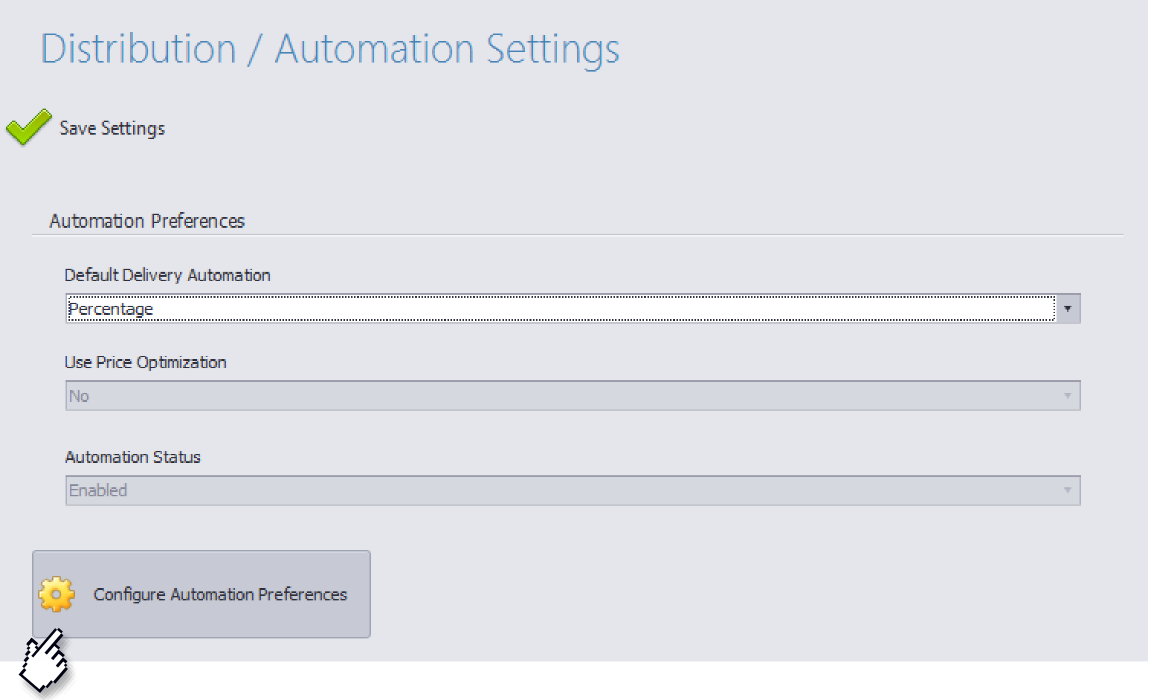
Save Weight Values | Edit Priority

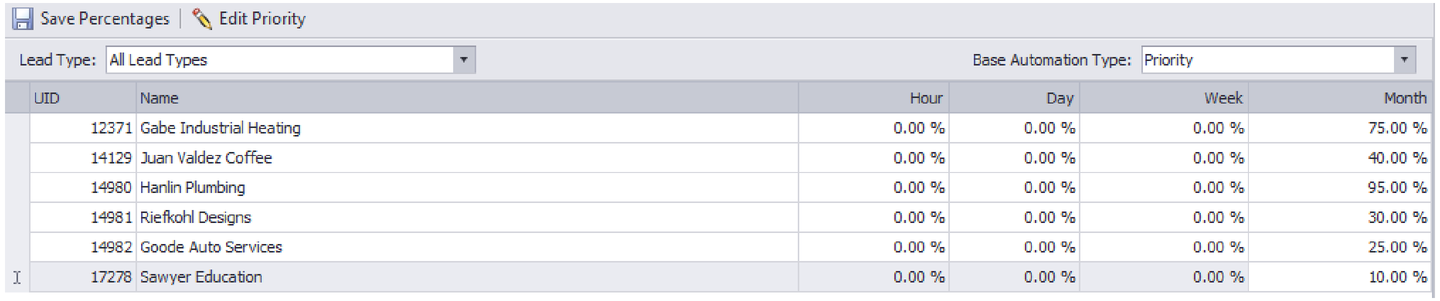
Lead Type: All Lead Types   Base Automation Type: Priority

UID	Name	Hour	Day	Week	Month	Total
12371	Gabe Industrial Heating	0	0	0	500	0
14129	Juan Valdez Coffee	0	0	0	150	0
14980	Hanlin Plumbing	0	0	0	200	10
14981	Riefkohl Designs	0	0	0	450	5
14982	Goode Auto Services	0	0	0	50	2
17278	Sawyer Education	0	0	0	25	0

Percentage

- → Percentage-based delivery allows you to control which percentage of your total leads certain clients will receive within a specific timeframe
- → Click on Configure Automation Settings to save your changes and edit your percentages
- → Base automation Type:
  - → If two clients share the same percentage, the system will then determine who gets the lead by the base automation type. You can choose to have the system look at the clients via
    - → Priority
    - → Round Robin
    - → Price.





UID	Name	Hour	Day	Week	Month
12371	Gabe Industrial Heating	0.00 %	0.00 %	0.00 %	75.00 %
14129	Juan Valdez Coffee	0.00 %	0.00 %	0.00 %	40.00 %
14980	Hanlin Plumbing	0.00 %	0.00 %	0.00 %	95.00 %
14981	Riefkohl Designs	0.00 %	0.00 %	0.00 %	30.00 %
14982	Goode Auto Services	0.00 %	0.00 %	0.00 %	25.00 %
17278	Sawyer Education	0.00 %	0.00 %	0.00 %	10.00 %

F.A.Q.

- → **Q.** Do I have to save every time I configure automation settings?
  - → **A.** Yes, the reason this is in place is to ensure you are editing the correct distribution option for your system.

Setting up a PING/POST Delivery

What is a PING/POST?

→ A PING/POST allows you to send vital lead information to your clients without including information such as:

- → First Name
- → Last Name
- → Address
- → Email

→ Once this ping is received by your client they respond back if they want the lead. Once the lead is accepted the post is fired off with the rest of the lead information.

Why should I use a PING/POST as my delivery?

→ Using a PING/POST delivery will ensure that your lead is something your clients are interested in without sending them contact specific lead information. Doing this will increase the likely hood of you getting your leads accepted by your clients.

Setting up a PING/POST Delivery

- → To set up your PING/POST delivery you will need to get PING/POST instructions from your clients.
- → These instructions should include:
  - → Posting URLS both for the PING and for the POST
  - → Ping specific fields
  - → Post specific fields
  - → Example Responses both for the ping and the post.

PING URL: http://secure.leadexec.net/leadimport.asmx/PINGReceiver
POST URL: http://secure.leadexec.net/leadimport.asmx/LeadReceiver

PING Field Definition

Data Type	Required	Field Name	Description
Numeric	Yes	VID	Lead Source Identifier (5147)
Numeric	Yes	LID	Lead Type Identifier (3331)
Numeric	Yes	AID	Campaign Identifier (9958)
Money	No	PhoneBill	Phone Bill
Value List	No	TimeToCall	Time To Call
Allowed Values		170281	Morning
		170282	*Afternoon*
		170283	*Evening*

POST Field Definition

Data Type	Required	Field Name	Description
Numeric	Yes	VID	Lead Source Identifier (5147)
Numeric	Yes	LID	Lead Type Identifier (3331)
Numeric	Yes	AID	Campaign Identifier (9958)
Numeric	Yes	OrderID	PING Order ID
Email	No	Email	Email
Text	Yes	FirstName	First Name
Text	Yes	LastName	Last Name
Phone Number	Yes	Phone	Phone Number
Money	No	PhoneBill	Phone Bill
Value List	No	TimeToCall	Time To Call
Allowed Values		170281	Morning
		170282	*Afternoon*
		170283	*Evening*
Zip Code	No	ZipCode	Zip Code

Wednesday, August 14, 2013 8:47 AM

Setting up a PING/POST Delivery

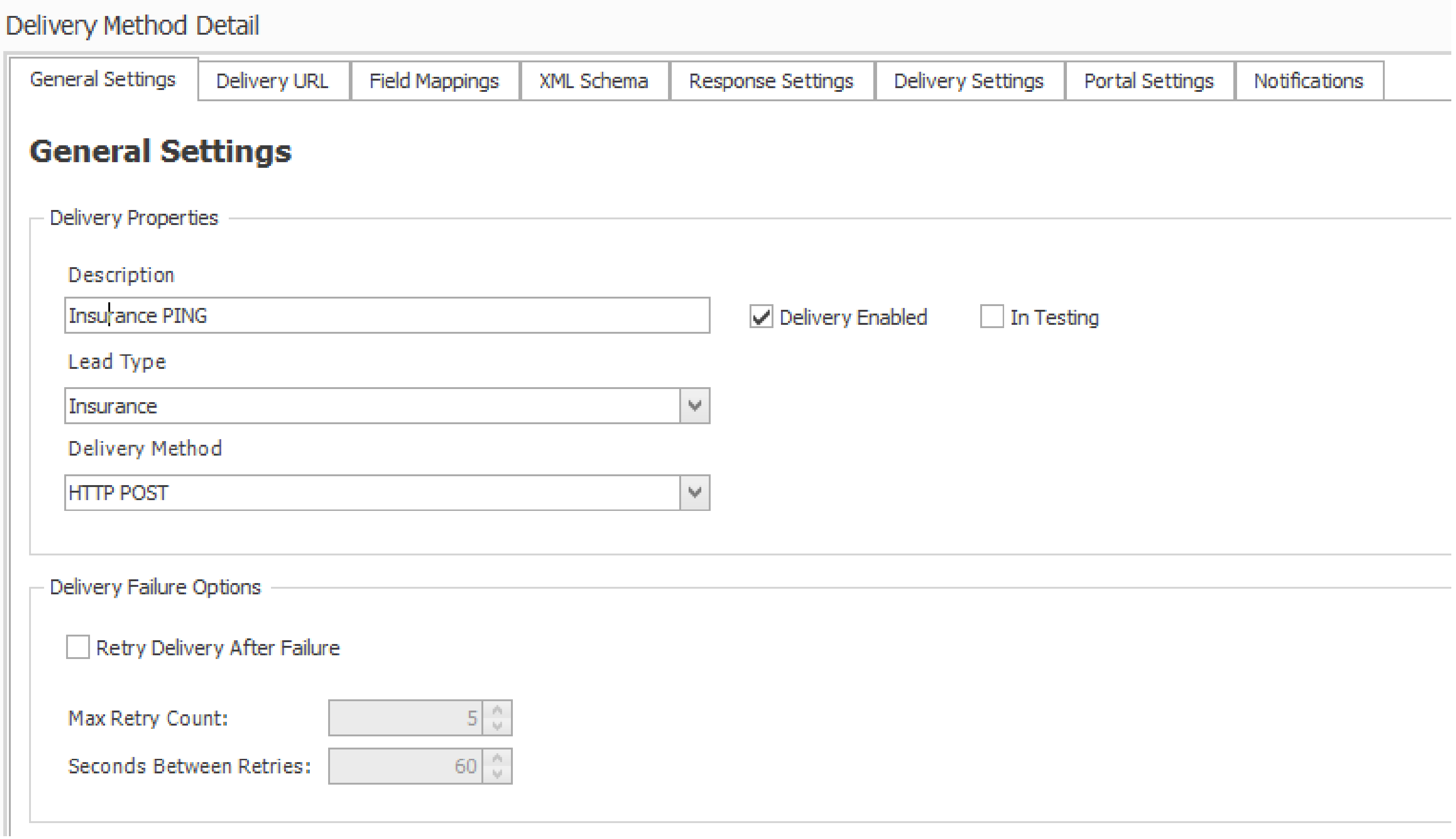
Creating the PING Delivery

→ Step 1: Enter the client you will be setting up the PING/POST for.

→ Step 2: Click Delivery Methods and Click *Create*.

→ Step 3: Give the Delivery Method a name so you will know that this is the PING.

→ Step 4: Ensure the Lead Type and Delivery Method match the requirements by your client.



Setting up a PING/POST Delivery

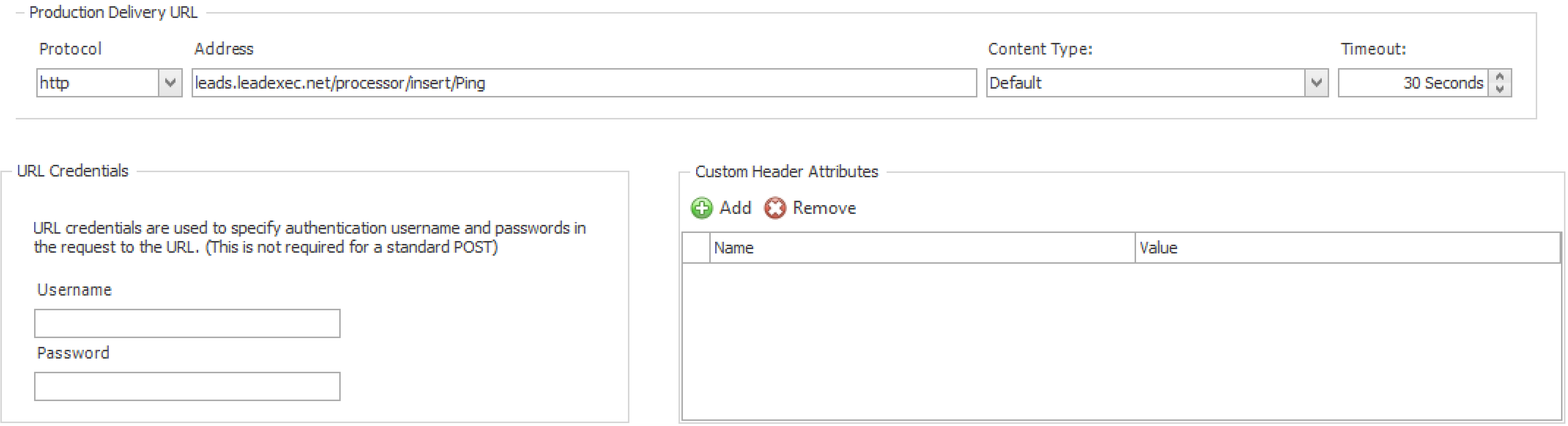
Creating the PING Delivery

→ Step 6: Click on the Delivery URL Tab and paste in the clients posting URL.

→ Step 7: Ensure that the Content Type is set to send the information in the correct method.

→ Step 8: If your client requires any URL credentials to be entered before posting the information you will need to input the credentials under the URL Credentials section.

→ Step 9: If you are using a SOAP post or a delivery that requires custom header attributes click *Add* set the Action that needs to be used as well as the value. Click *OK* once you have those entered.



Setting up a PING/POST Delivery

Creating the PING Delivery

→ Step 10: Click on the *Field Mappings t*ab to start mapping your fields to send across as your client expects them.

→ Step 11: Click *Add Mapping*

→ Step 12: Input the name of the field your client is expecting you to send over under the Field Name section.

→ Step 13: Ensure you select the correct field type. If you are sending a static value to be sent on every lead set the value to *Static Value*. If you are sending a lead field select *Lead Field.*

→ Step 14: If you are sending a static value enter in the value under the Static Value section

→ Step 15: If you are sending over a lead field select the lead field from the Lead Field Properties section by clicking on the dropdown and selecting the correct field.

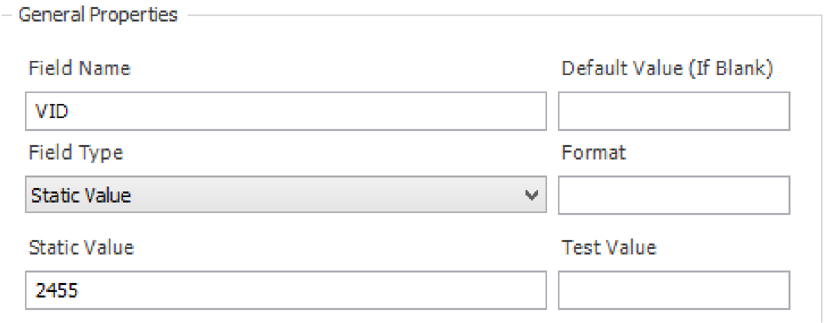


Figure 1 – Static Value Example

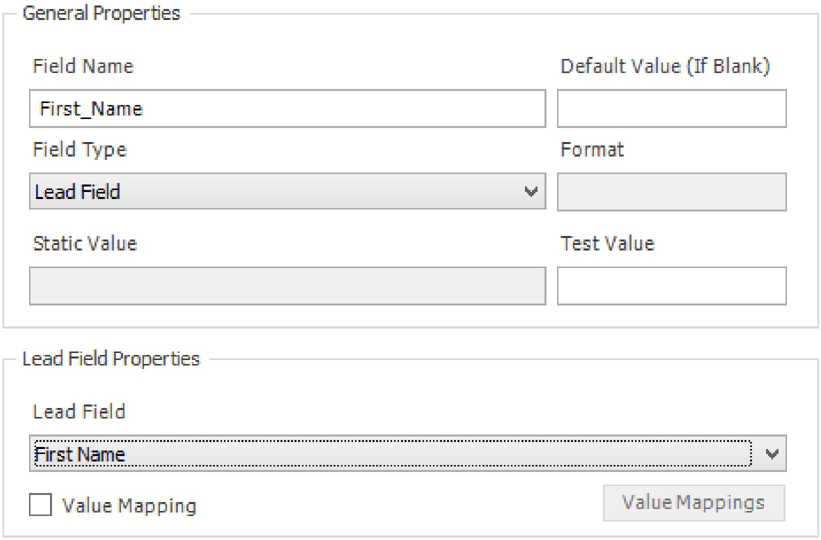


Figure 2 – Lead Field Example

Setting up a PING/POST Delivery

Creating the PING Delivery

→ Step 16: Click on the *Response Settings* tab to set up the response information from this delivery.

→ Step 17: Under the Response Information you are going to want to put a value that is unique to an accepted lead. In this case I am using <WillAccept>true</WillAccept>

→ Step 18: Under the Revenue Search you are going to want to use a regular expression to capture the price sent back in your clients response. In this case I am going to be using (.*). Here is what I input in this section <Price>(.*)</Price> This will capture the price and display it inside of LeadExec.

→ Step 19: Under the PING Reference Search you are going to enter a regular expression to capture the reference that needs to be sent to your clients in the post end to tie this ping in with the post that will be fired once the ping is accepted. In this case I am using (.*). Here is what I input for this section <OrderID>(.*)</OrderID>. This will capture the value send in between the nodes and allow them to be send on the post.

→ Step 20: Click *Save* once you have completed these steps.

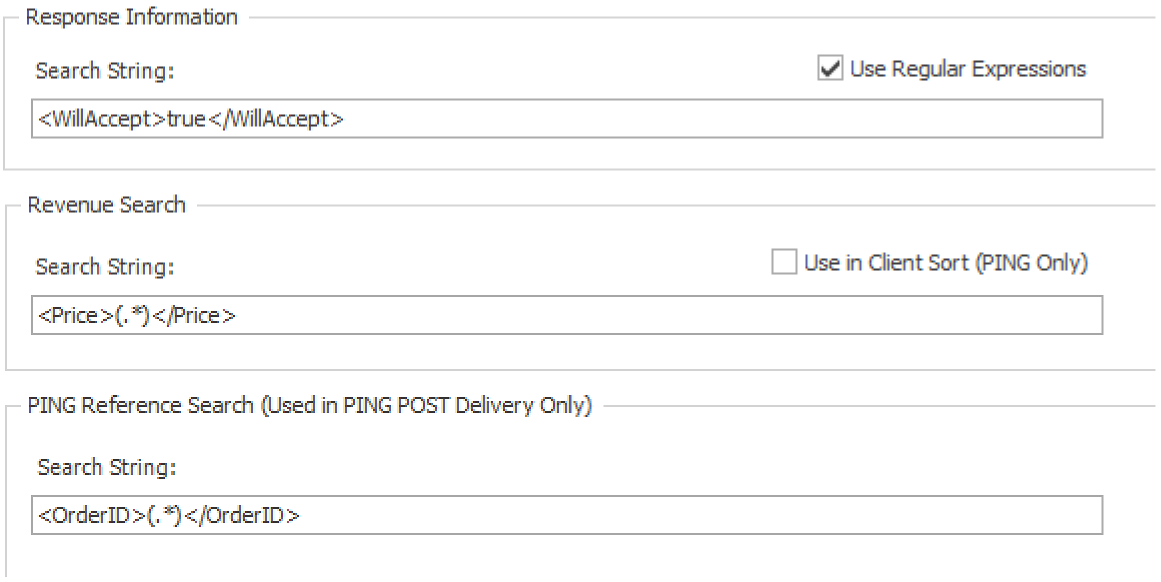
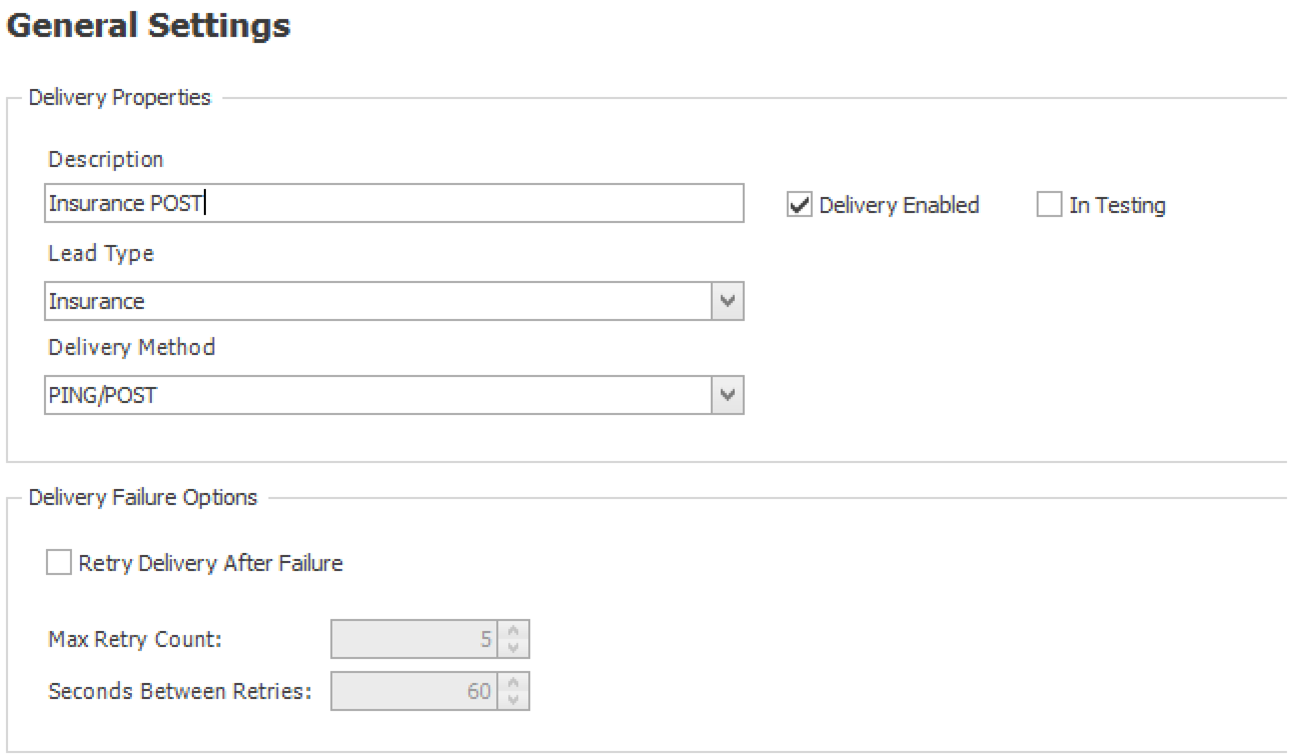


Figure 3 – Response Settings for the PING

Setting up a PING/POST Delivery

Creating the POST Delivery

- → Step 1: Click **Create** to begin the POST end of the delivery.
- → Step 2: Give the Delivery Method a name so you will know that this is the POST end of the PING/POST delivery.
- → Step 3: Select the appropriate Lead Type for this delivery.
- → Step 4: Set the Delivery Method to *PING/POST*. This tells the system that this is the POST end of the delivery.



Setting up a PING/POST Delivery

Creating the POST Delivery

→ **Step 5:** Click on the ***Field Mappings*** tab to start mapping your fields to send across as your client expects them.

→ **Step 6:** Click ***Add Mapping***

→ **Step 7:** Input the name of the field your client is expecting you to send over under the Field Name section.

→ **Step 8:** Ensure you select the correct field type. If you are sending a static value to be sent on every lead, set the value to ***Static Value***. If you are sending a lead field select ***Lead Field***.

→ **Step 9:** If you are sending a static value enter in the value under the Static Value section

→ **Step 10:** If you are sending over a lead field, select the lead field from the Lead Field Properties section by clicking on the dropdown and selecting the correct field.

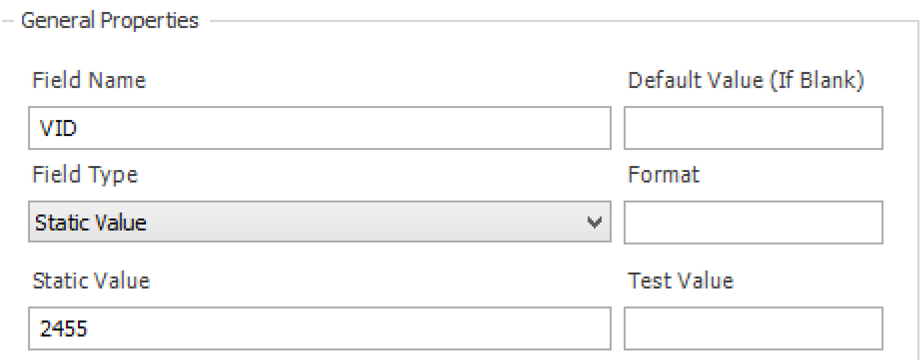


Figure 1 – Static Value Example

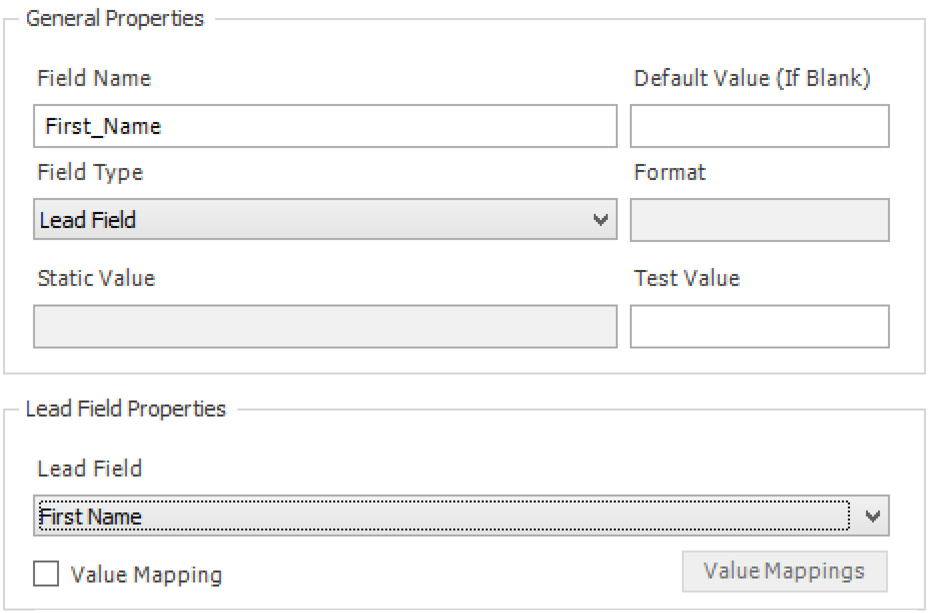


Figure 2 – Lead Field Example

Setting up a PING/POST Delivery

Creating the POST Delivery

→ **Step 11:** Click on the ***Field Mappings*** tab to start mapping the ping reference ID captured from the ping

→ **Step 12:** Input the name of the field your client is expecting you to send over under the Field Name section.

→ **Step 13:** Ensure you select ***Static Value*** as the field type. Under the Static Value text box you are going to want to input [ping reference] this will send over the ID captured from the ping.

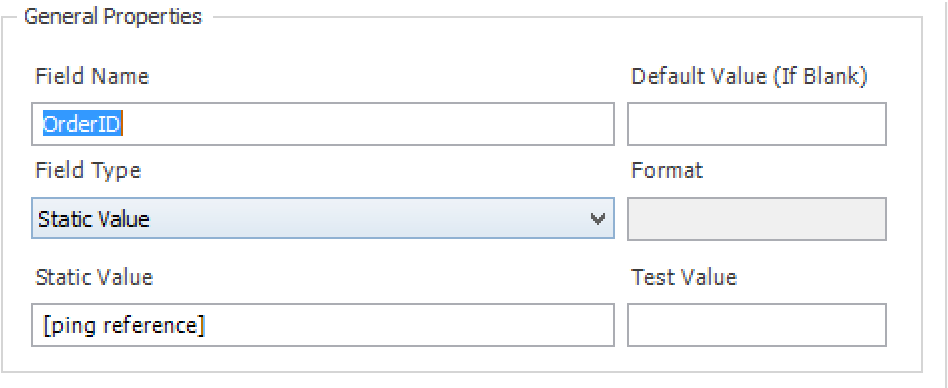


Figure 3 – Ping Reference example mapping

Setting up a PING/POST Delivery

Creating the POST Delivery

→ Step 14: Click on the *Response Settings* tab to set up the response information from this delivery.

→ Step 15: Under the Response Information you are going to want to put a value that is unique to an accepted lead. In this case I am using <WillAccept>true</WillAccept>

→ Step 16: Click *Save* once you have completed these steps.

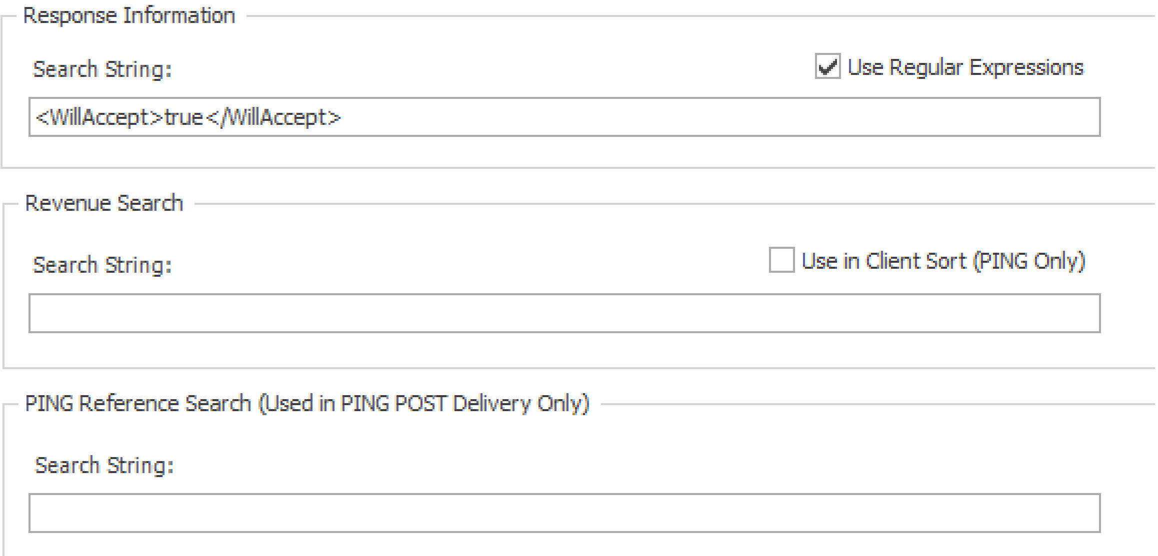


Figure 4 – Response Settings for the POST.

F.A.Q.

- → **Q.** Can I use PING/POST Deliveries for other Delivery Method types? Such as XML or SOAP?
  - → **A.** Yes, you would select the appropriate delivery method and ensure that the content type is set appropriately.

Billing Preferences

Setting up your Authorize .NET or PayPal Account

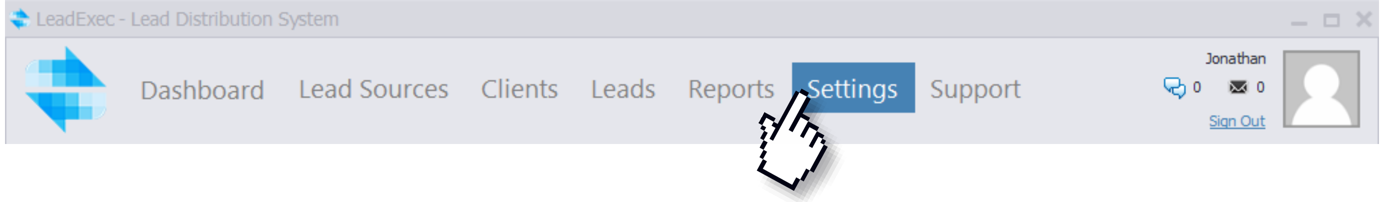


Figure 1: Navigating to the *Settings* Tab

→ Step 1: Click on *Settings* (see Figure 1)

→ Step 2: From the listing on the left, select *Billing* (see figure 2)

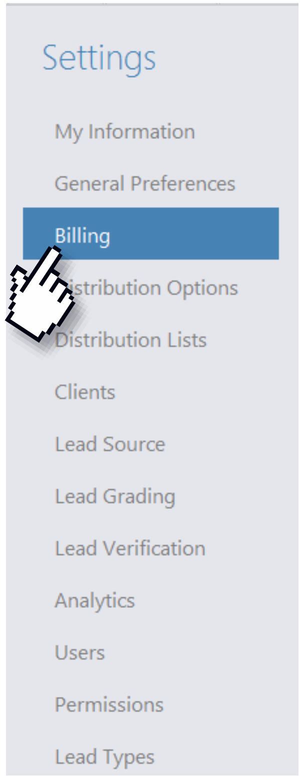


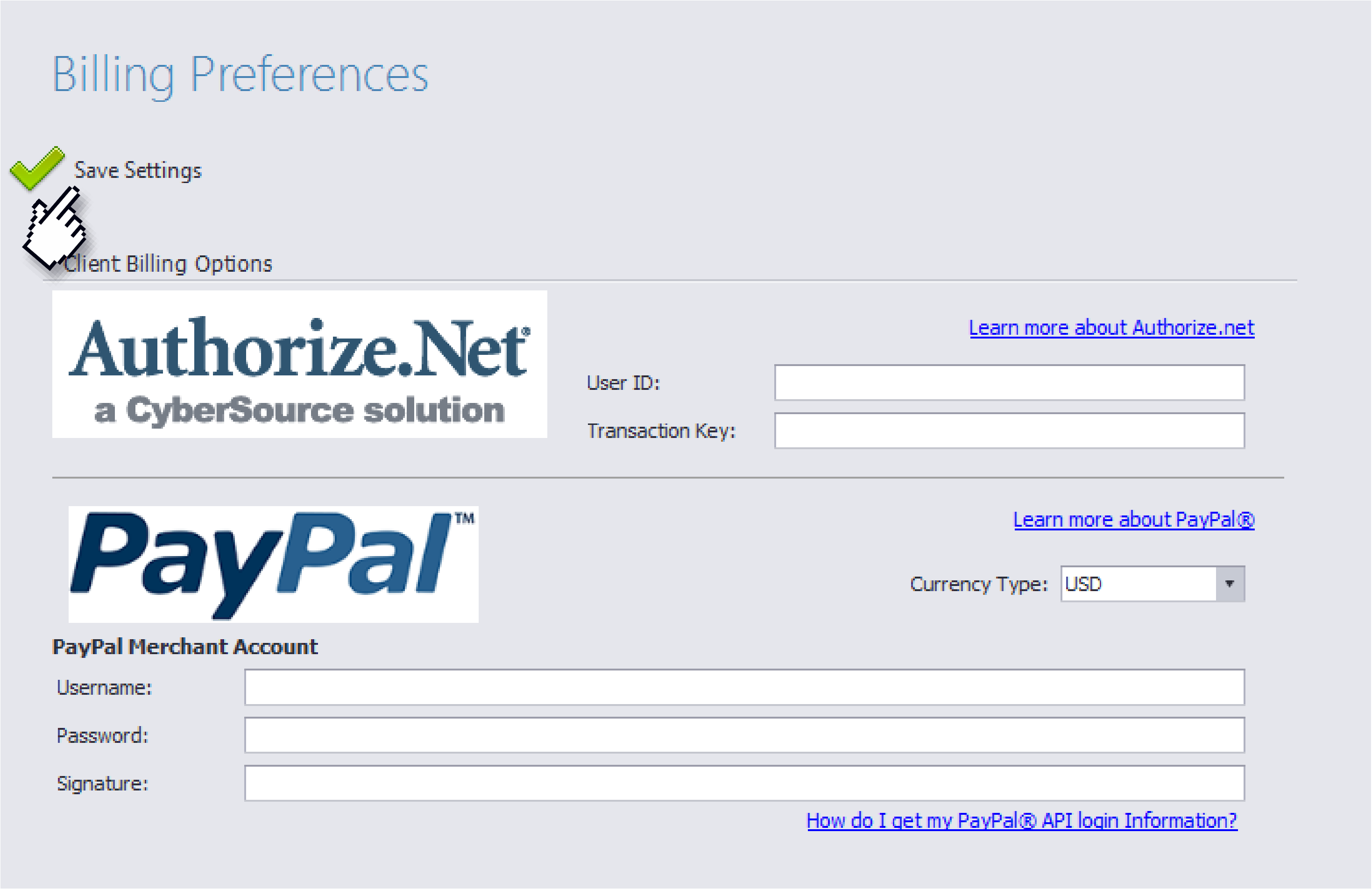
Figure 2: Select *Billing*

Billing Preferences

Setting up your Authorize .NET or PayPal Account

→ Step 1: Enter in your Information for either your Authorize.net Account or PayPal account. Your information will save when clicking on *Save Settings*

→ Note: For more information on either of these items please visit
  http://www.authorize.net/
  or
  https://www.paypal.com/



Configuring Orders

→ To successfully use your merchant account, your clients must have orders in place to function properly. First step in creating your order is to open the clients **Delivery Account**.

→ To do this, click on *Clients*
-> Select a client from the list
-> Select *Delivery Accounts*
-> Select an account an account and click *Modify*
(As Shown in **Figure 1**)

→ Once inside the account go to *Delivery Options*, and enable the last dropdown to **Yes** before clicking *Save*. (As shown in **Figure 2**)

→ Once saved, directly underneath the Delivery Account list, click on *Orders* to be taken to your order screen

Figure 1: Navigating to your Delivery Account to modify

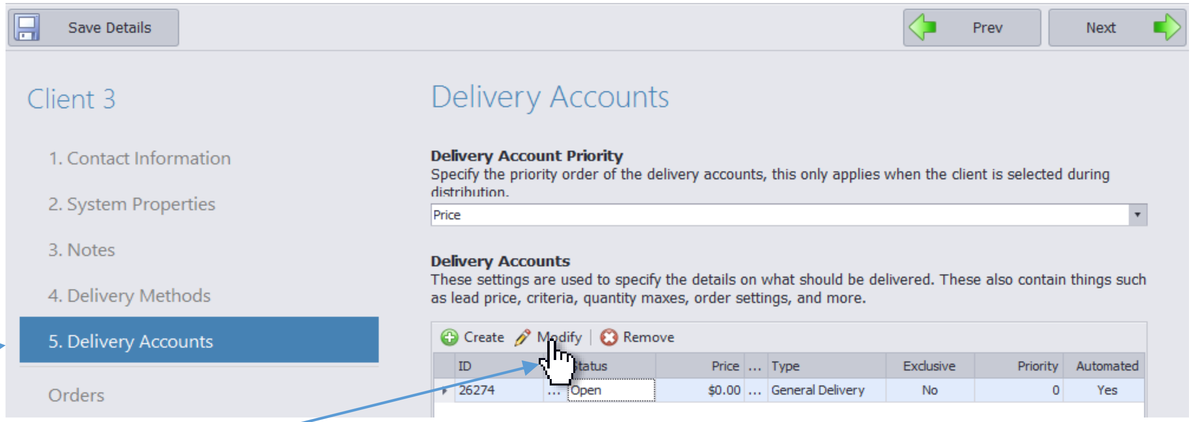
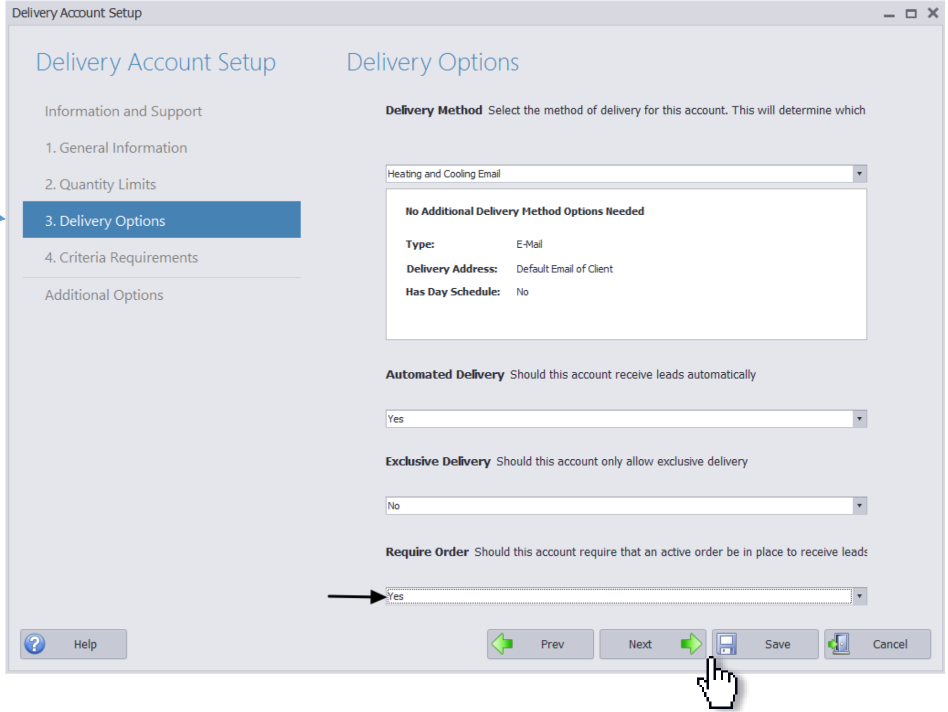


Figure 2: Requiring an Order and Saving Changes



Your Order Screen

→ This screen will show you

1. Status
2. Start Date
3. End Date(If Applicable)
4. Order Quantity
5. Order Value
6. Remaining Items
7. Renewal Settings
8. Auto Charge Status (Yes or No)

→ Your order screen will show you a list of all your orders, past and present.

→ To create a new order click *Create*. (As shown in Figure 1)

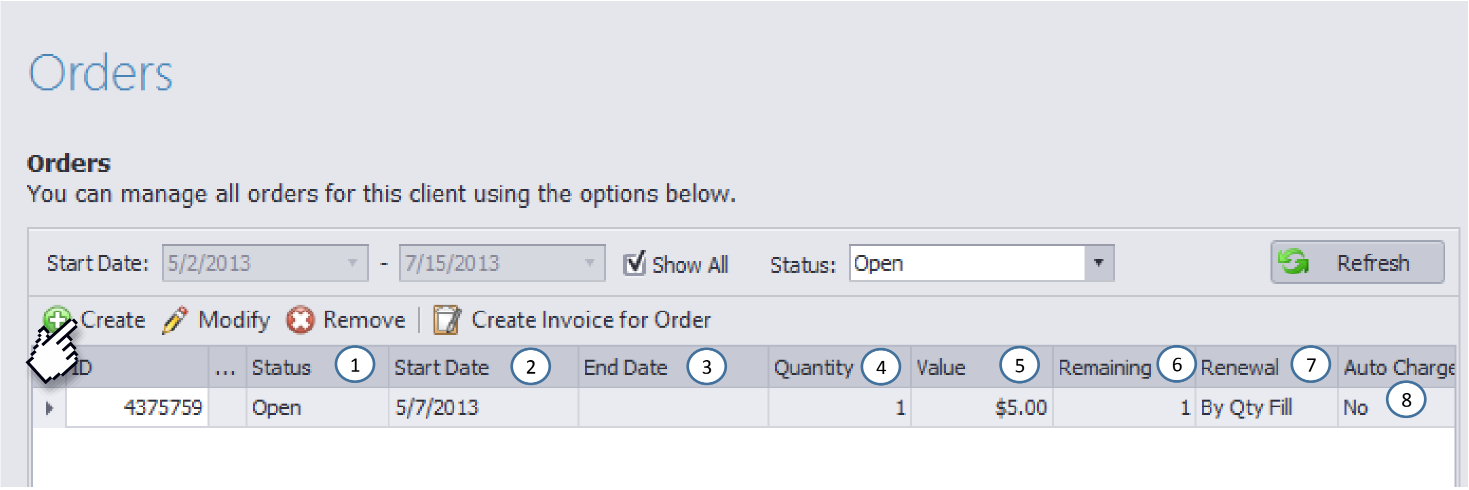
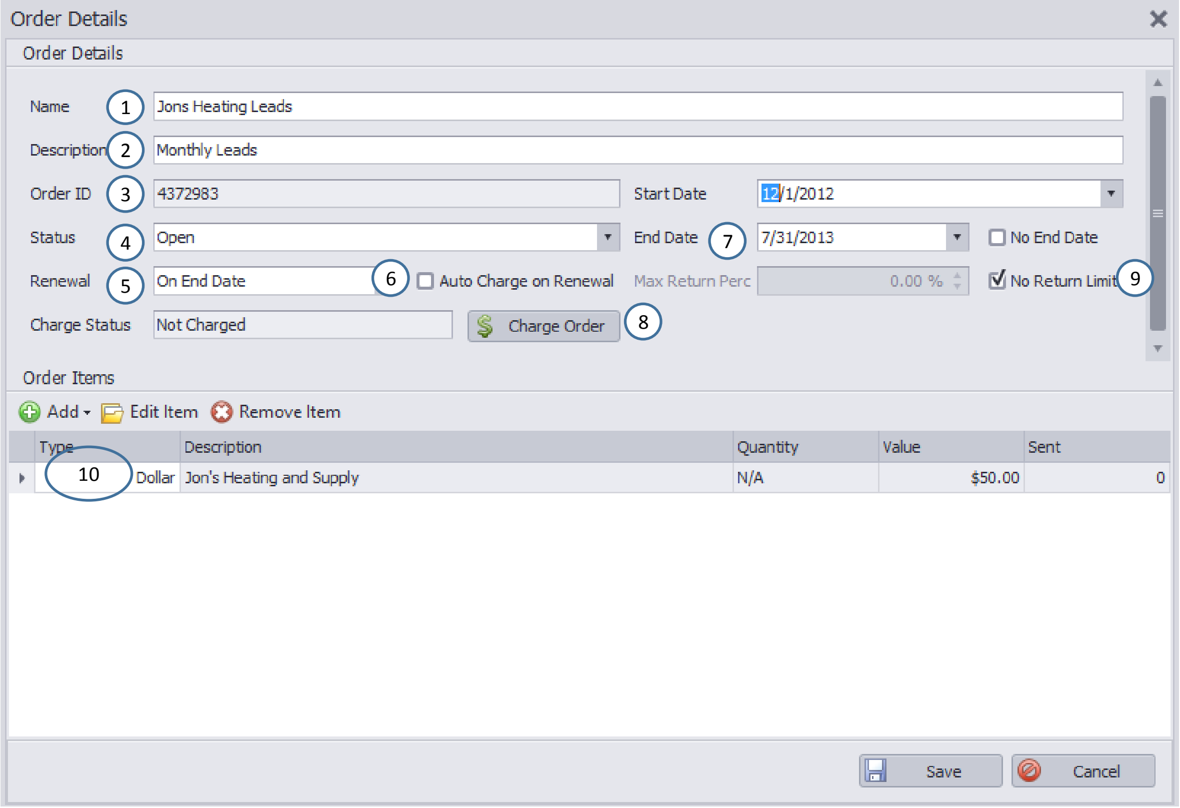


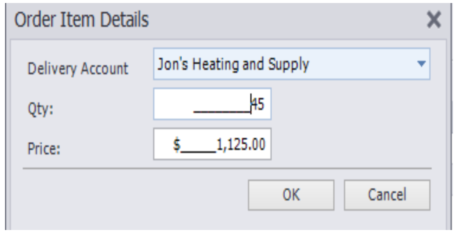
Figure 1: Click on *Create* to move onto the Order Details Screen

Setting up Order Details

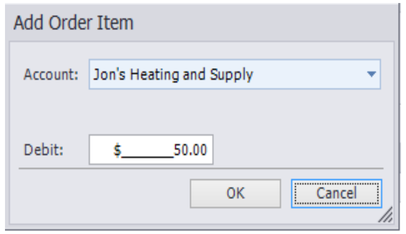
1. Name dictates the name of your order
2. Description tells you what the order is for
3. Order ID will be automatically generated
4. Status tells you whether the order is open or closed
5. Renewal lets you know how the order should be renewed. Your options are:
   - On End Date
   - Quantity Fill
   - No Renewal
6. Auto Charge on Renewal
   - Will charge on renewal if checked
7. End Date
   - Will end the order once the specified date arrives
   - No End Date Checked will keep the order opened indefinitely
8. Charge Status/Charge Order
   - Informs you if the card has been charged
9. Max Return Percentage
   - Allows you to determine a % of returns based on how many leads the client receives
   - Having No Return limit disables this option and will not put a % return cap on this order
10. Order Items
    - List your active orders under this order detail



Quantity Item-
This will add an order into your system and will deliver leads until the QTY has been filled.



Dollar Debit Item-
Assign it to an account and each lead delivered will be tracked. The final send count will be the amount charged.



F.A.Q.

- Q. How Do I charge an order?
  - A. You can charge an order by Clicking the ***charge*** button inside of your active order.

- Q. Can I auto renew my order?
  - A. In order for your order to auto renew you must ensure that the Auto renew feature is checked.

- Q. Where do I input my clients card information?
  - A. To input a clients credit card number, first open your client, then select *Billing information* to add a new card.

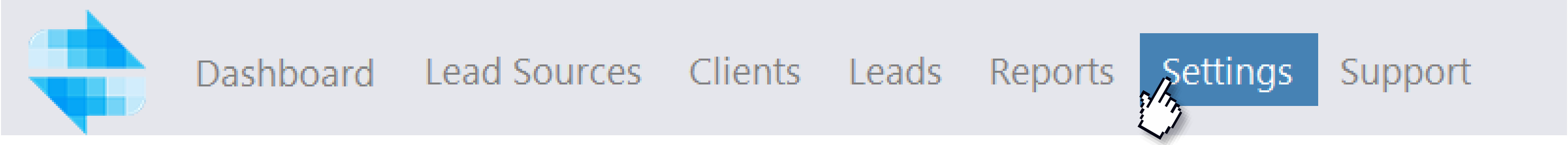
Configuring Custom Logos and Tabs

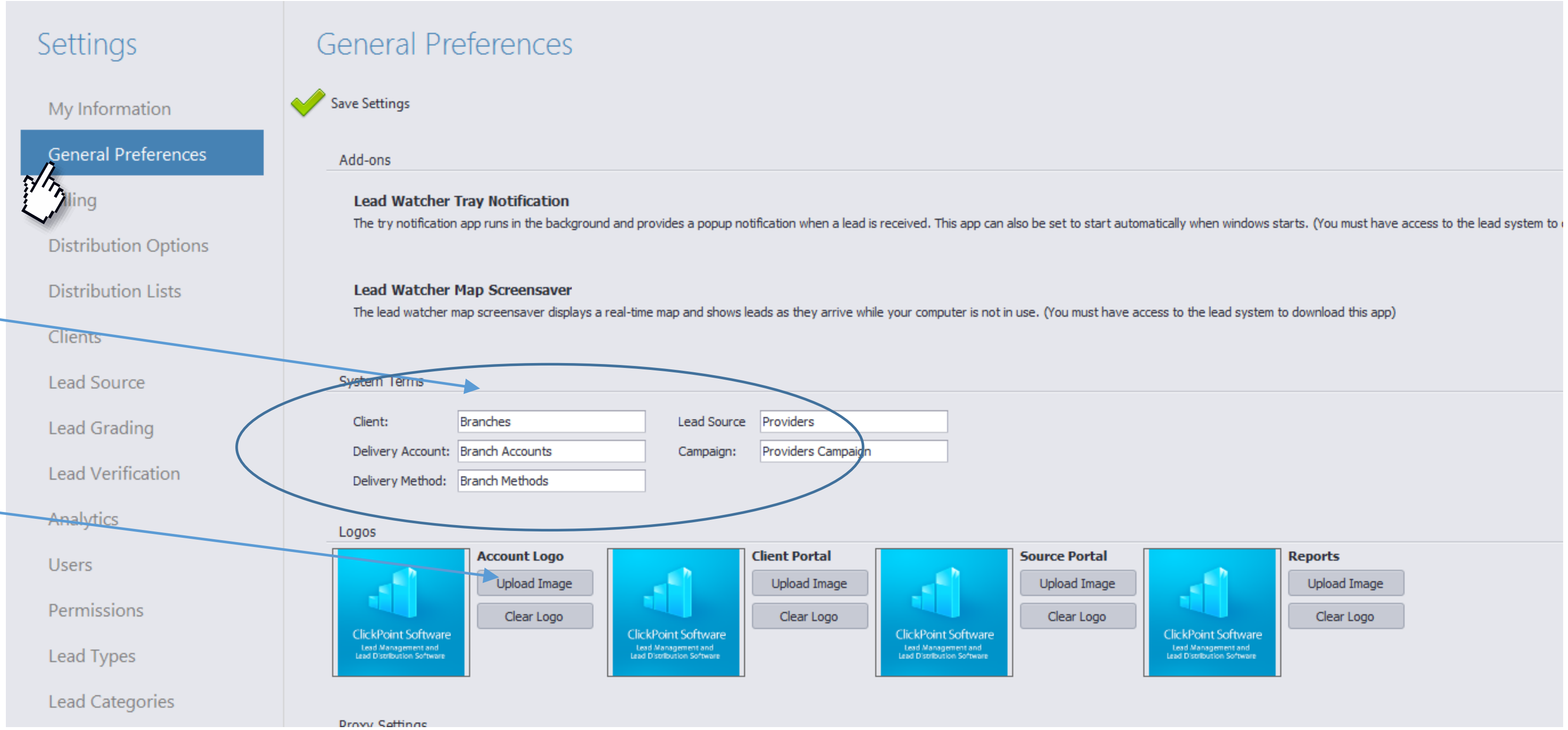
→ At Clickpoint, we understand the meaning of making something your own, Within LeadExec you have the ability to upload custom logos To do this, click on the *settings* tab.

→ Select *General Preferences*.

→ From here you can change the vocabulary of any of the default tabs, simply by typing in the box associated with the system term.

→ To update your logos, there are 4 easy to use upload buttons for your Account, Client Portal, Source Portal and Reports.





F.A.Q.

→ Q. What is a System Term?

→A. A System Term by default is how LE will display the data along the top row. We give you the option to change the terminolog to better suit your needs.

→ Q. How Big can my logo be?

→A. Your logo can be up to 60 Pixels in height and there is no width limit.

→ Q. Where does my logo show?

→A. The logo will be edited for the following areas as long as an image is uploaded.

- →Account
- →Vendor Portal
- →Client Portal
- →Reports

→ Q.What Format does my image need to be?

→A. The image you upload into your system should be in a PNG format.

What is Lead Grading?

Getting the most out of your LeadExec Account

Why is this important?

Lead Grading allows you to validate information on your leads by running checks on system fields set on your lead type.

You are able to run grading on the following fields:

- Address – Ensures that the address is deliverable.
- IP Address – Checks to make sure that the IP is tied to the Address.
- Comments – Makes sure that the comments section has information input.
- Email – Ensures that the email address is deliverable
    - Disposable Email (Leads@gmail.com)
    - Custom Domain email (Leads@clickpointsoftware.com)
- Phone - Checks to see if the number is a working number
    - Land Line
    - Mobile

You are able to set up a custom grading scale with each letter grade allowing you to have leads follow certain routes.

LeadExec will then show the grade of the lead inside of the reporting screens. (Shown in in **Figure 2**)

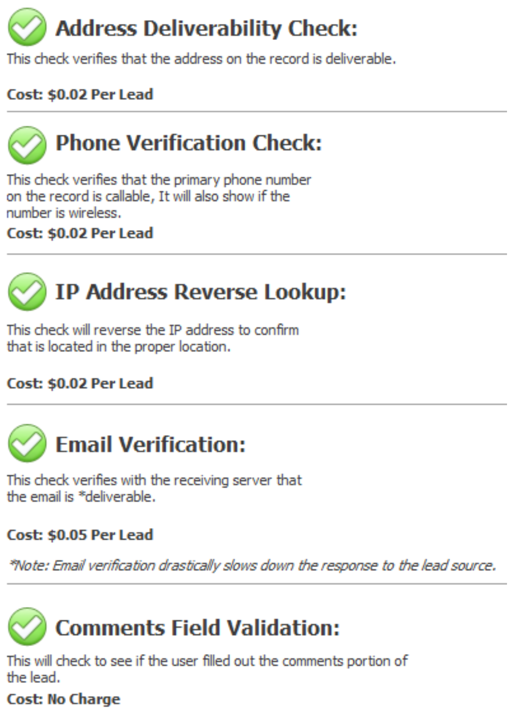


Figure 1: Image showing the lead grading options.

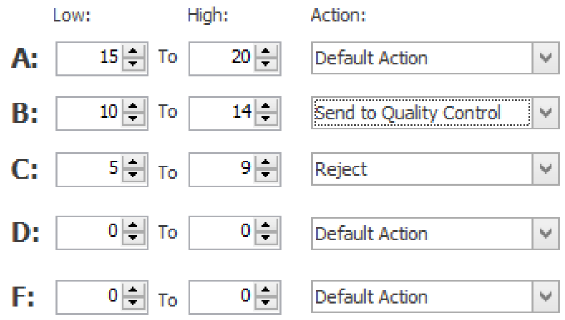


Figure 2: Image depicting the grading scale.

Setting up Lead Grading

→ **Step 1:** Navigate to the Settings section by clicking the *Settings* link at the top, and clicking the *Lead Grading* option that will appear on the left side.

(Illustrated in **Figure 1**)

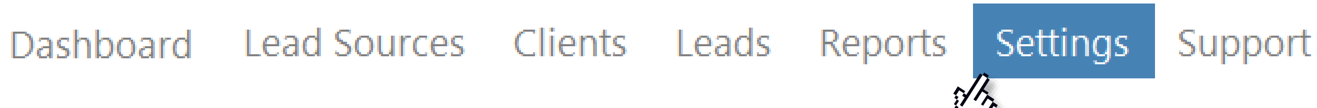


Figure 1: Image depicting how to get to the Settings section.

→ **Step 2:** Once you are in the *Lead Grading*, enable the validation options you wish to use by selecting *Enable*. Do this to all validation options you want to use.

(Illustrated in **Figure 2**)

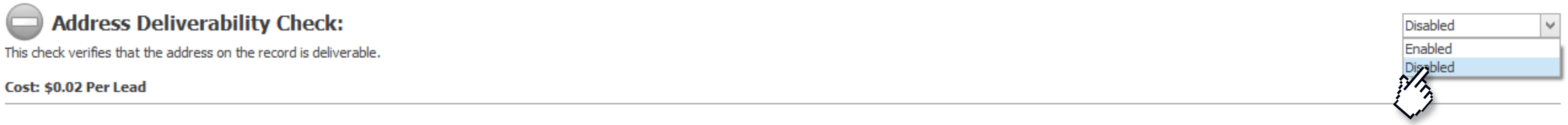


Figure 2: Depicting how to enable a validation option.

Setting up Lead Grading

→ **Step 3:** Once you have all of your validation options set the next step will be to set a point value each validation can earn if the lead passes.

(Illustrated in **Figure 3**)

→ **Step 4:** Once the scores are in place it's time to set up your grade settings. At the bottom right of the Lead Grading section you will see the highest possible score. This will assist you with inputting your grade scores.

(Illustrated in **Figure 4**)

→ **Step 5:** Once the Lows and Highs are set for each letter it's time to set the action each grade will follow. To do this select the Action Dropdown box.

(Illustrated in **Figure 5**)

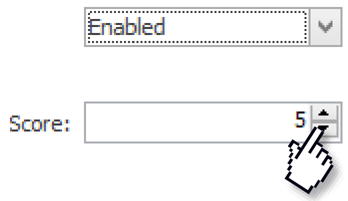


Figure 3: Image depicting how to set a point value.

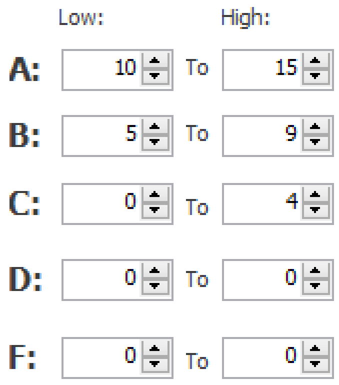


Figure 4: Depicting the letter grade scoring system.

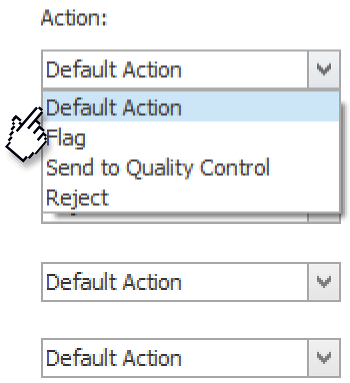


Figure 5: Depicting how to set the action each grade will take.

Setting up Lead Grading

→ Step 6: Click *Save and Agree* located at the top left of the Lead Grading Section.

(Illustrated in Figure 6)

→ Step 7: The next step will be to implement this across all the campaigns receiving leads that you want to be graded.

(Illustrated in Figure 7)

Figure 6: Image depicting how to set a point value.

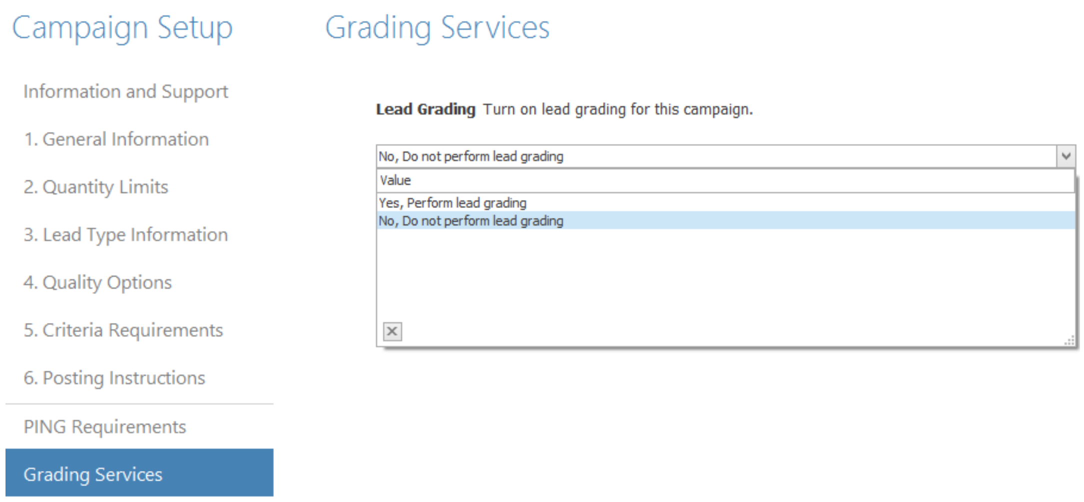


Figure 7: Depicting the letter grade scoring system.

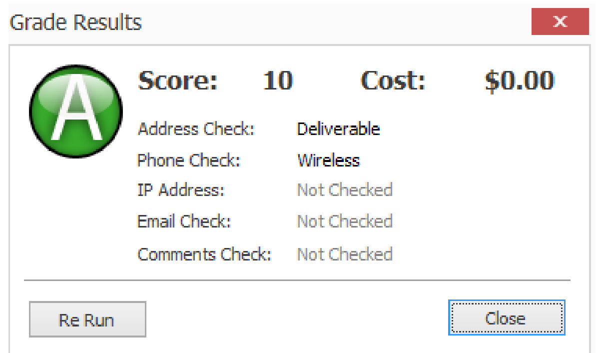


Figure 8: Depicting the Grade Results inside of LeadExec.

F.A.Q.

- Q. Is there a cost associated with Lead Grading?
  - A. Yes, the cost varies depending on the validation that you choose to enable. The max cost per lead is $0.11.
- Q. Does Lead Grading Reject leads based off of certain validation options?
  - A. Yes, you are able to set custom actions depending on the grade that your lead gets. Doing this you are able to reject leads that don't meet your requirements.
- Q. Will this option be available for every lead type?
  - A. Yes, doing this allows you to set the grading terms for your entire account.
- Q. Can I run custom grades for different campaigns?
  - A. Yes, you are able to customize the grades per campaign by setting the lead grading terms inside of the campaign itself.
- Q. How can I view why a lead was given a specific grade?
  - A. If you right click the lead in the Search Leads screen and select ***View Lead Grade*** you will be able to see the Grading Scores for that specific lead.

Setting Up Call Routing Inside of LeadExec

→ To begin setting up call routing in your system, click on the *LeadSources* tab.

→ Select a *Lead Source* from Your List, and click *Modify* Campaigns (see Figure 2)

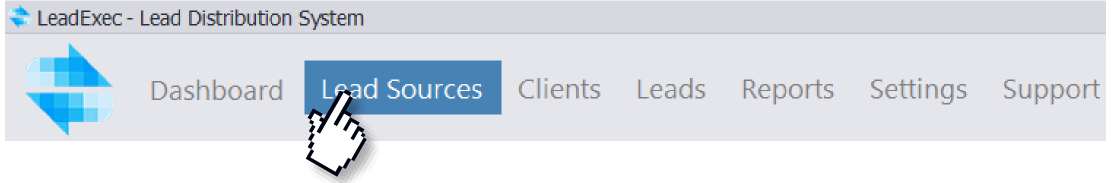


Figure 1: Selecting *Lead Sources* tab

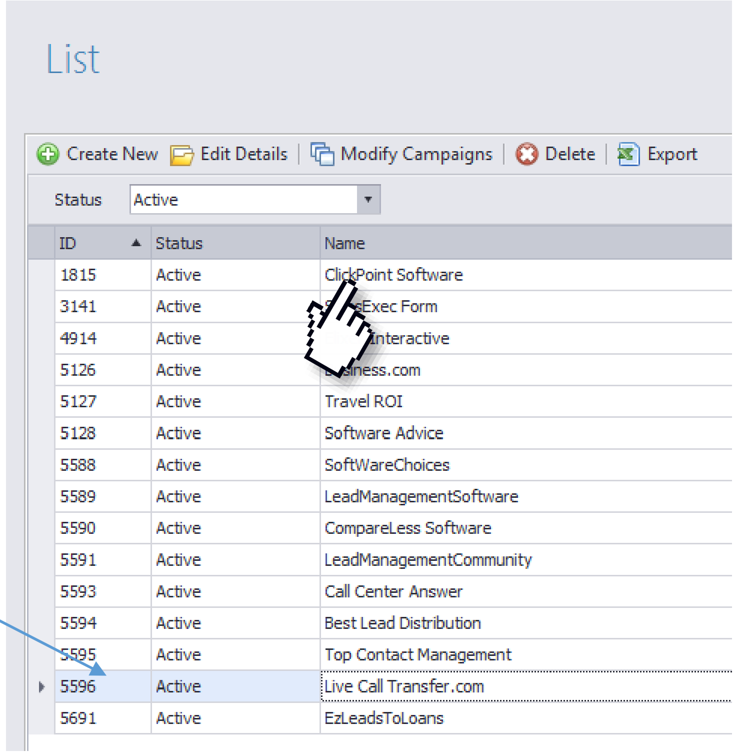


Figure 2: Selecting a *Lead Source* to modify your Campaign

Navigating to your IVR Numbers

→ From within your campaign list, select the campaign and hit *edit* (see Figure 1)

→ Next, from within your campaign Click on *IVR Numbers and Scripts* (see Figure 2)

→ From this Screen you will have the ability to:

- Edit Numbers
- Add Numbers
- Delete Selected Leads
- Edit Scripts
- View Existing Numbers

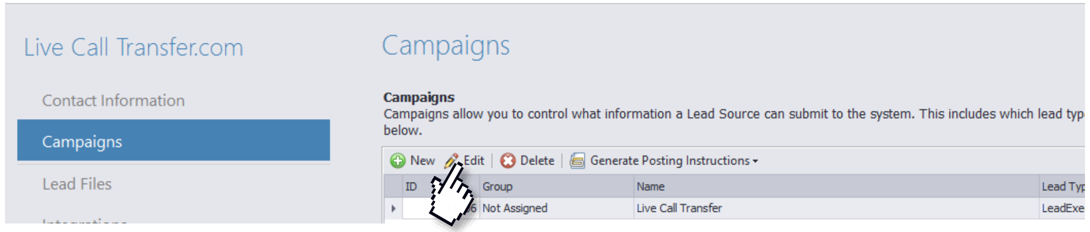


Figure 1: *Edit* your Campaign to navigate to your Lead Forms

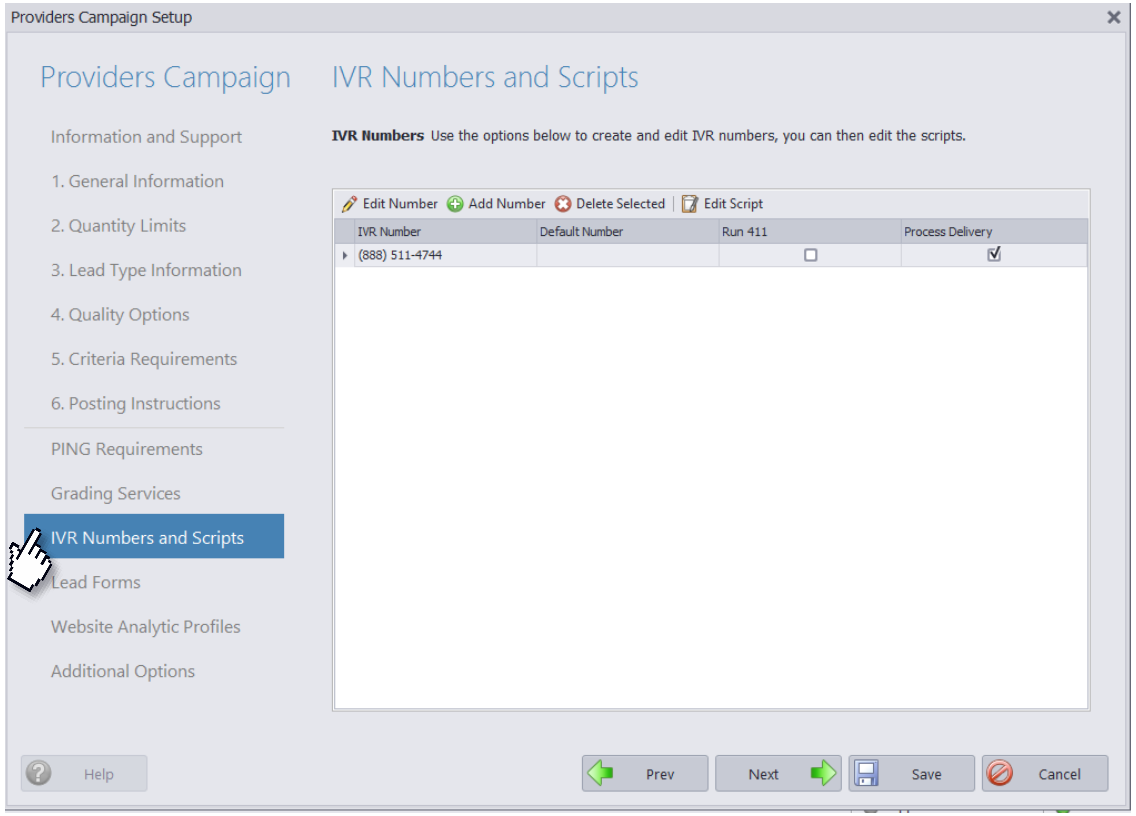


Figure 2: Click on *IVR Numbers and Scripts* to View or Add Forms.

What Happens Now?

→ Now that you have purchased your IVR number, it now falls to the ClickPoint Team to integrate your numbers. Items you will need to provide are as follows:

  → Call Script – this will be the way your call flows and what data is captured and shown in our system
  → Lead Source and Campaign the IVR Is tied to.

→ *Note:* You can attempt writing your own scripts, by using the CDYNE Integration guide found here.

→ http://wiki.cdyne.com/index.php/Phone_Notify!_TextToSay_Advanced_Commands

Figure 2: Returning Live Call Clients

Viewing Your Calls Inside of LeadExec

→ To View your Leads inside the LeadExec System, click on the *Leads* Tab(Figure 1)

→ IVR Lead details, such as *call duration* can only be viewed in the Search Leads Screen(Figure 2)

→ You can see the call detail history by selecting *call details*

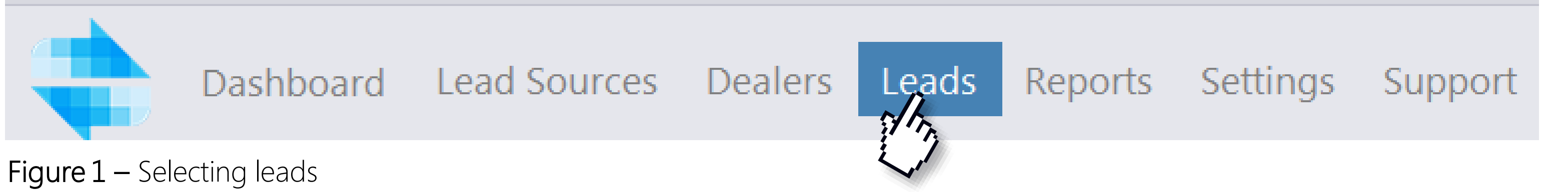


Figure 1 – Selecting leads

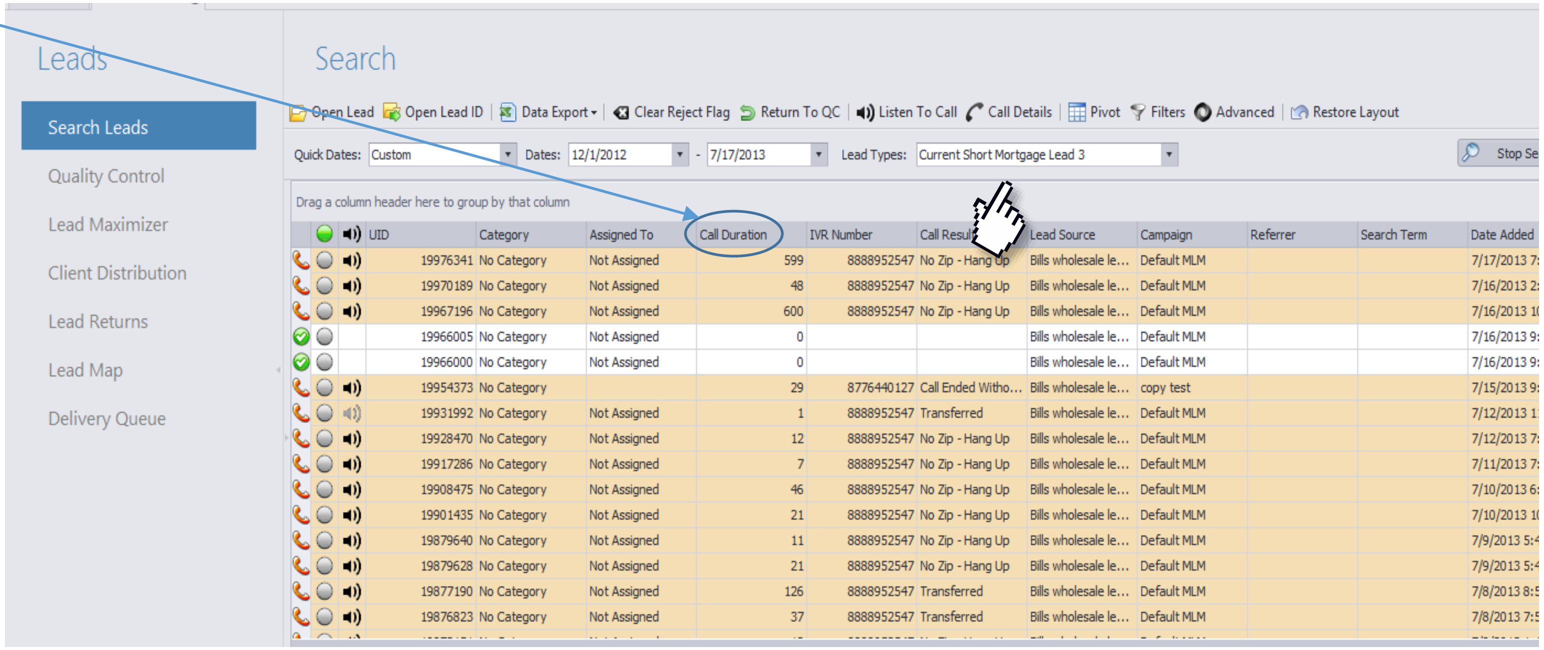


Figure 2 – Viewing Call Details

Your Call Details

→ In Your Call Details you can view the following information

- Call Result
- IVR Number Dialed
- Duration of Call
- Listen to the Recording
- Client Transferred Information

→ The Call Log, will show you the steps the IVR took when accepting the call and display keys pressed, as well as transfer information.(Figure 1)

→ You can listen to your call by clicking the *Listen To Call* Hyperlink which will open the call recording media player. (Figure 2)

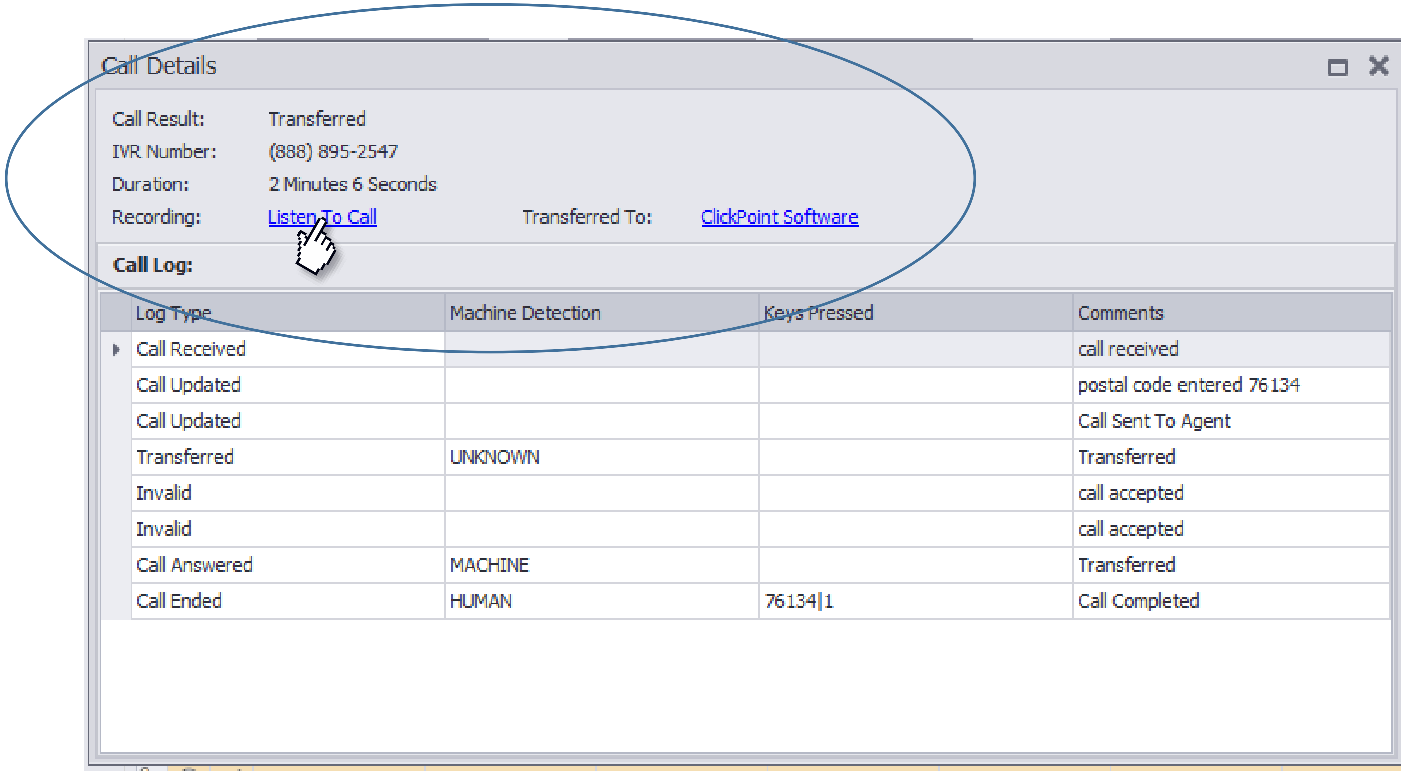


Figure 1: – Call Details Log

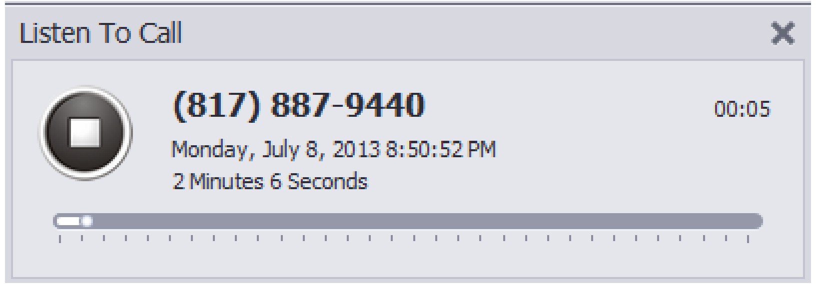


Figure 2: – Listening to Call Details

F.A.Q.

→ Q. Is there a cost for the IVR Number?

→A. Yes, IVR Numbers cost $5.00 upon purchase, and then $5 extra a month.

→ Q. Is there a minute per fee charge?

→ A. Yes, normally there is a 12-15 cent charge per minute. Varies by account.

→ Q. Why does my IVR not Work?

→ A. IVR's require a developer to script your IVR before being able to deliver IVR calls to your clients.

→ Q. My IVR doesn't sound right.

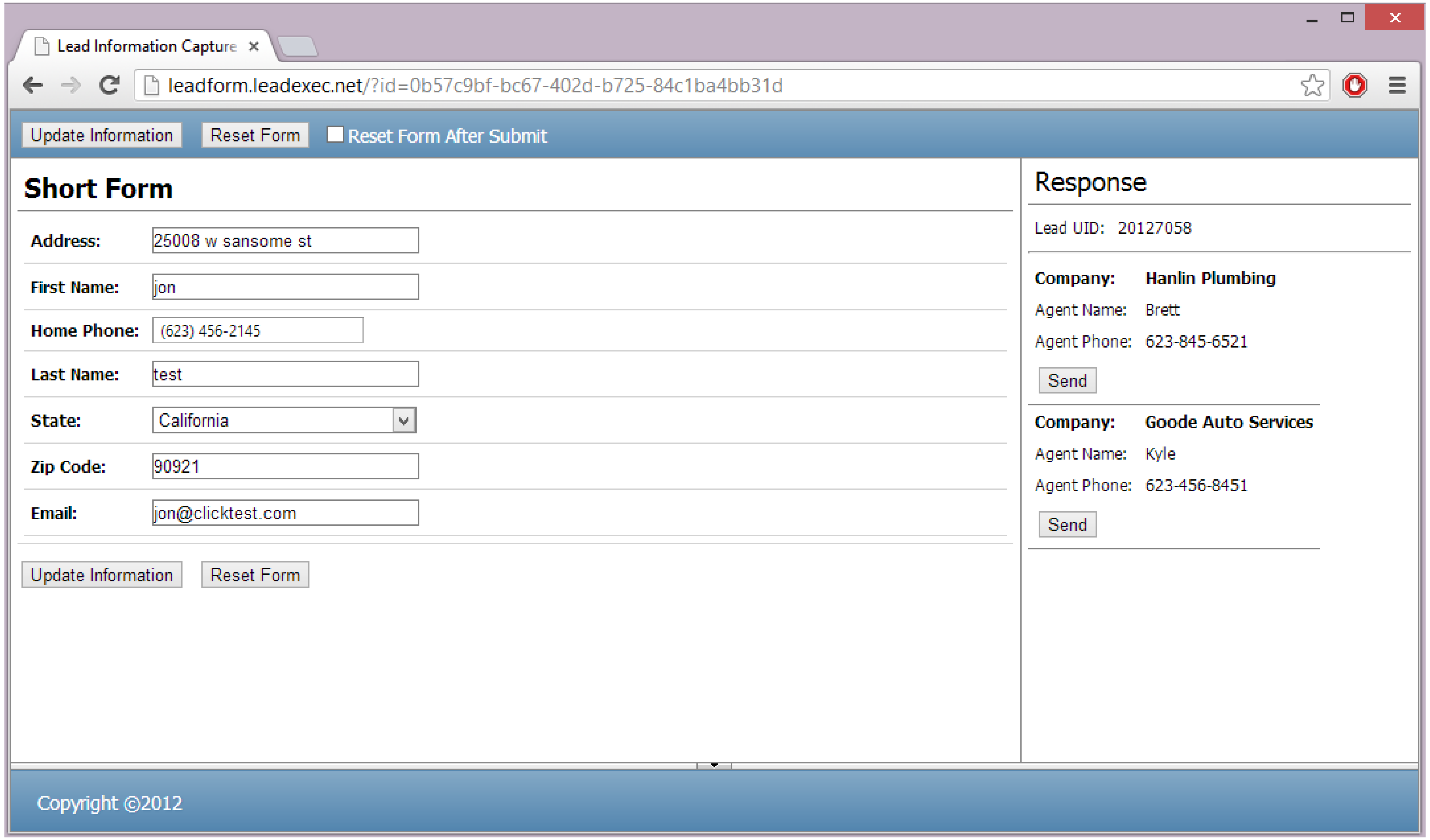
→ A. If you call your IVR and something doesn't sound right, i.e. you don't hear your normal prompts, we are most likely experiencing an issue with our phone provider. Please notify your account manager immediately about this.

→ Q. I no longer want my IVR

→ A. If you no longer want your IVR, please contact your support manager who will then deactivate that line. You can always re-activate it at a later date.

Generic Forms/ Live Call Transfers

→ Creating Live Call Transfers allows you the ability to create a generic form used specifically to transfer leads in real time. Upon submitting a lead with a Live Transfer form you will see a list of available clients who can take that lead, as well as their number, so that you can call that agent to let him know a lead is on its way.

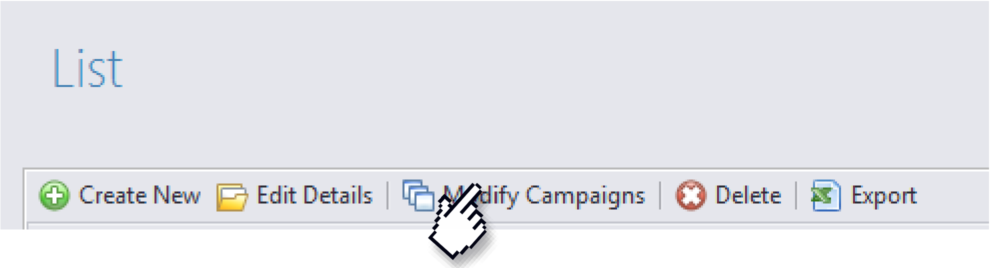


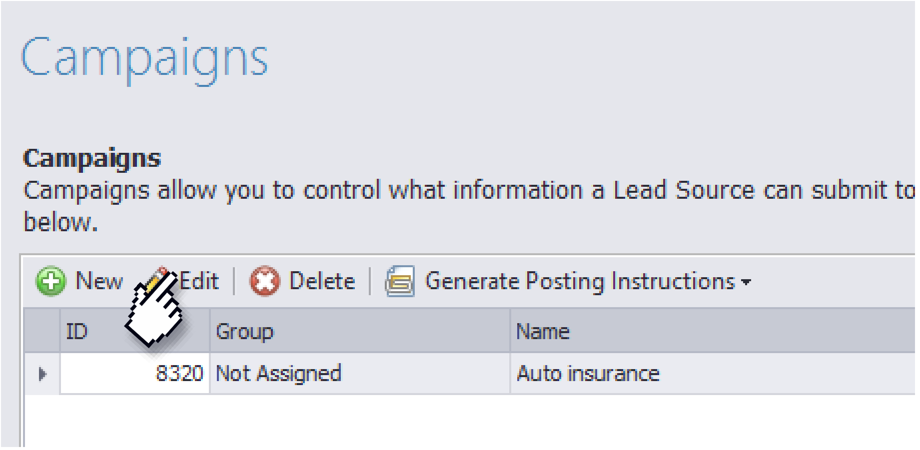
Setting Up a Live Call Transfer Form

→ Step 1: Select *Lead Sources* from the Top Tab to view your Lead Source List.

→ Step 2: Select a Source from your list and click, *Modify Campaigns*.

→ Step 3: Select Your Campaign and Click *Edit*.



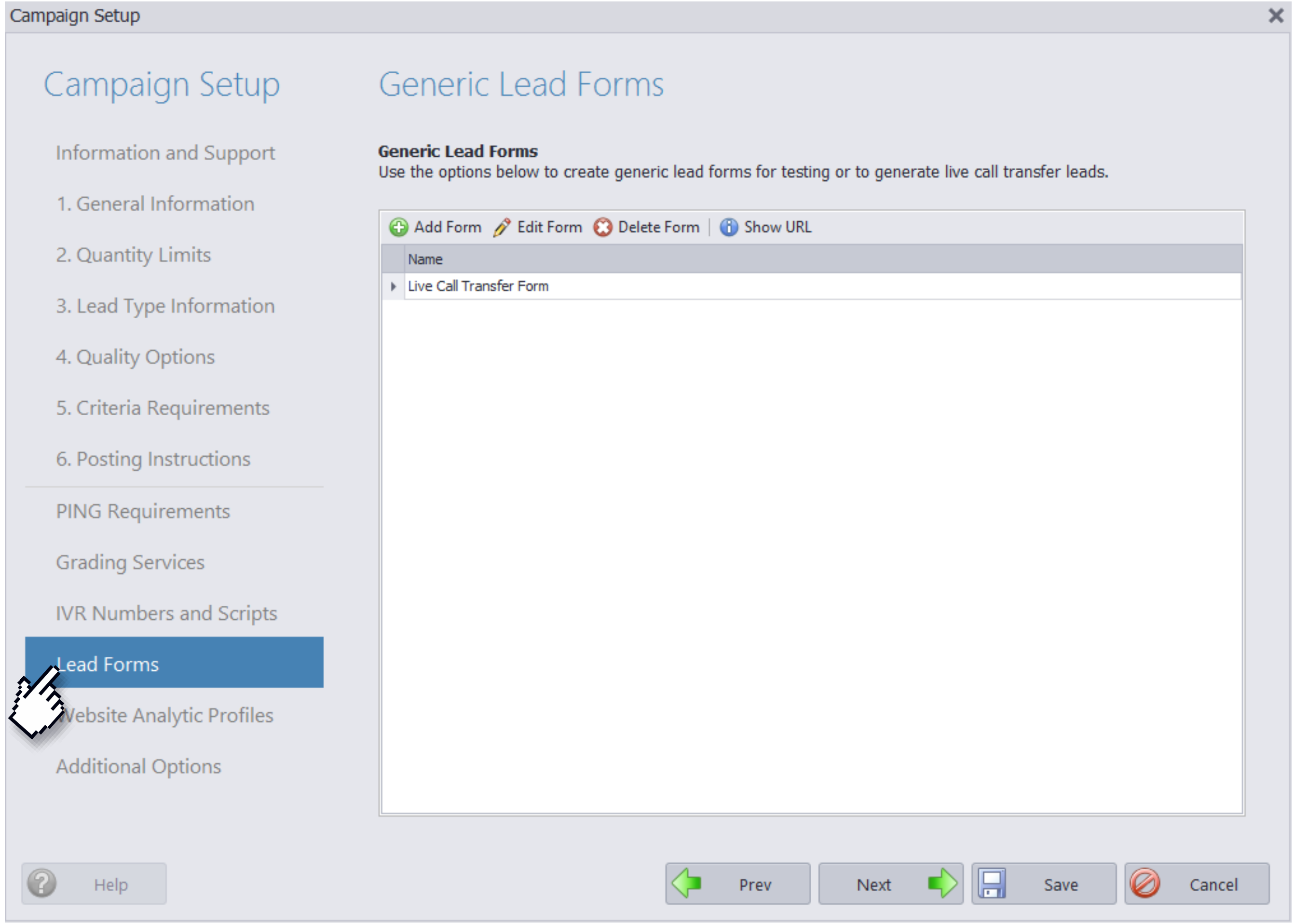


Creating your Form

→ The Lead Forms Tab will give you the options for the Following

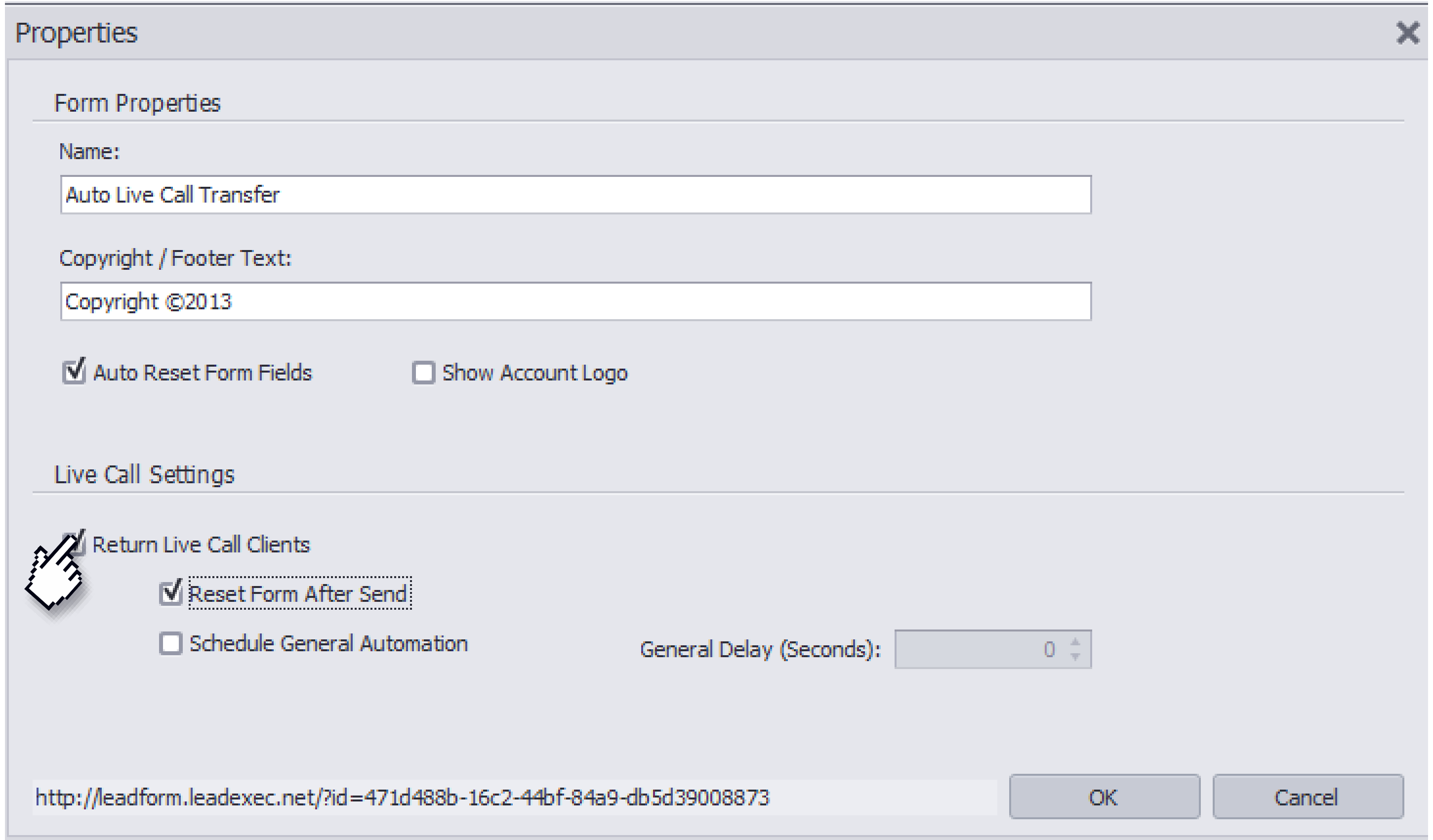
  → Add Form – Allows you to add a New Form
  → Edit Form- Edit an Existing Form
  → Delete Form – Delete an Existing Form
  → Show URL – Show Existing URL for Form.

→ To Create a New Form, Click *Add Form.*



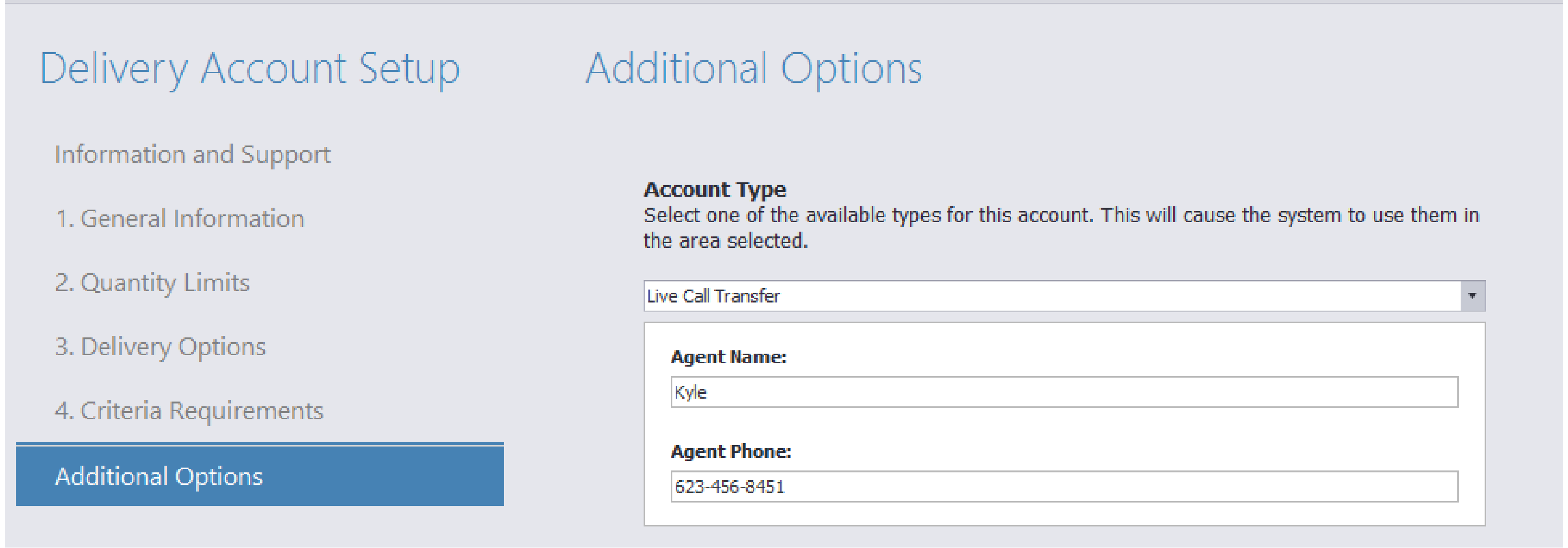
Lead Form Properties

- → Form Properties will allow you to do the following:
  - → Name your Form
  - → Copyright your Form.
  - → Reset form fields upon submission
  - → Show your Account Logo
  - → View your URL for this particular form.
- → In Order to Make this Generic form do Live Call Transfers, you must ensure the Return Live Call Clients Box is Checked. This will allow to set more specific options such as
  - → Reset live form after submit
  - → Schedule the lead for general automation to be delivered to the client.
- → *NOTE* Do not click on Return live clients for generic forms. Simply click OK once typing in the name in order to create your generic form.*



Setting Up Client For Live Call Transfer

- In Order to use your Live Call Transfer Form, you must ensure that your client can receive live call transfers. To do this:
  - Open Clients
  - Select Client
  - Go to Delivery Accounts.
  - Modify Delivery Accounts.
  - Additional Options.
- In the Additional Options, Set the Account Type to Live Call Transfer
  - Assign Agent Name
  - Assign Agent Phone.
- This Client is now set to receive Live Call transfer Leads



F.A.Q.

- **Q.** Fields are not Showing up on my Live Call Transfer Form
  - **A.** Ensure that you have the fields checked on the Field Group Section of your Lead Type. This is most often caused by field displays not being set properly.

- **Q.** My Form Resets after submission, how do I make it stop?
  - **A.** Head over to your Lead Forms, Ensure that the "Reset Form after Submit" option is not enabled.

- **Q.** How do I get my Form URL?
  - **A.** To Get your form URL you can click on the form from the lead forms screen and click ***Show URL***. From there you can copy your URL and have the option to open it from a browser.

- **Q.** My Client Doesn't Show Up on the Live Call Transfer Form Upon Submission
  - **A.** Ensure that the Client's Delivery Account is set to Receive Live Call Transfers and that an Agent Name and Phone are submitted.
  - *Note if client still does not appear**

    This may be due to the delivery method not being on the correct lead type. If your client still does not appear after checking the items above ensure the delivery method being used is on the correct lead type.

- **Q.** Will editing my existing delivery account taking web leads to Live Call Transfer mess with delivery?
  - **A.** Yes, if you already have an existing delivery account for your web leads, create a new account specifically set for live call transfer.

Setting up Double opt-in

→ Double Opt-In allows you to send an email to your lead to ensure that they want to be contacted by an agent or client when entering the system.

→ To set up your Double Opt In templates, click on the *Settings* Tab

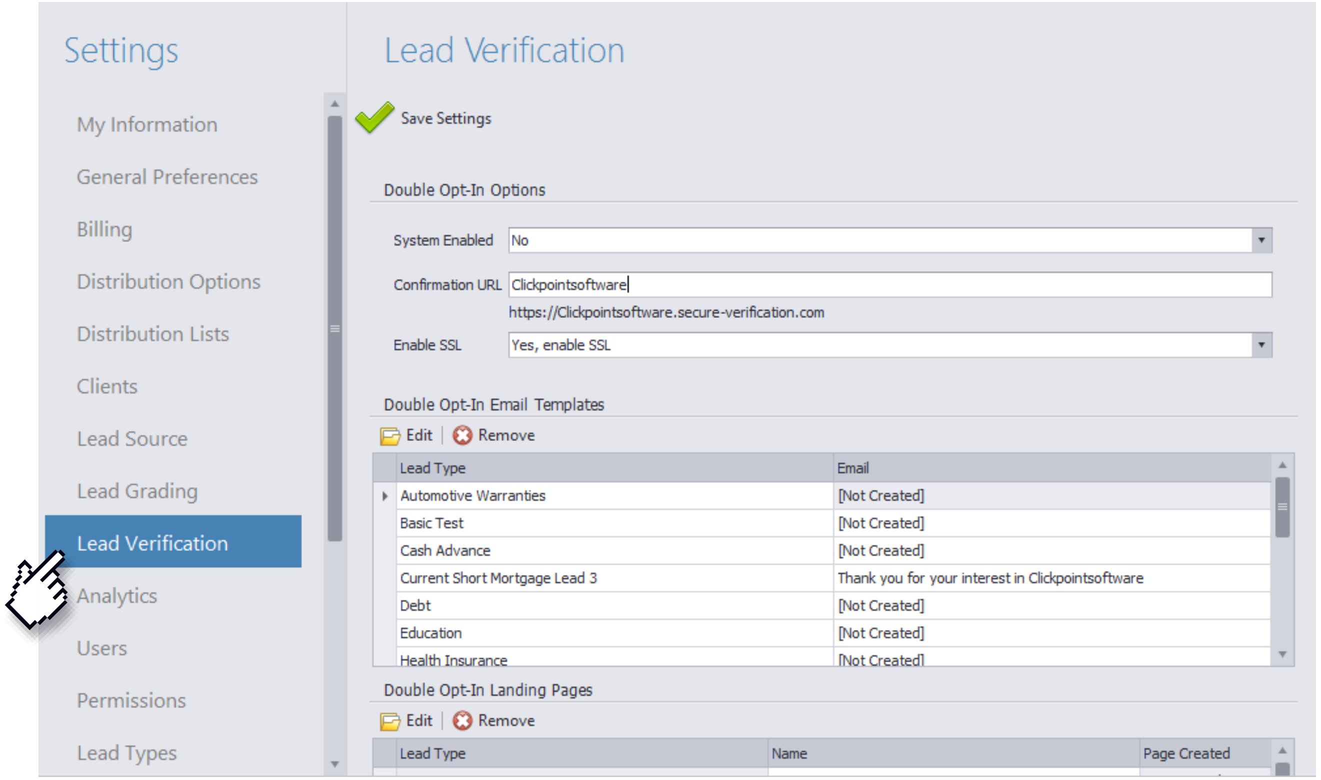
→ Select *Lead Verification*

→ Items of Interest on this Page

→ System Enabled – This tells the system whether or not you want to use the Double Opt In functionality.

→ Confirmation URL – This URL will be the URL the lead is directed to if the lead chooses to opt in.

→ Enable SSL – This will enable SSL encryption on your particular URL provided it is already SSL secured.



Templates

- → Double Opt-In Templates are the templates your lead will see and or be directed to based upon the actions listed.
- → Each Lead Type will be assigned its own Template.
- → Double Opt-In Template
  - → This is the Email Sent to the lead that will show them whether or not they want to opt in.
- → Double Opt-In Landing Pages
  - → This Is the page your lead will see when they accept the Double Opt-In Email
- → Double Opt-Out Landing Pages
  - → This is the page shown if your lead decides to opt-out
- → Click *edit* to change any of the template you have listed.

Double Opt-In Email Templates

Edit | Remove

Lead Type	Email
Automotive Warranties	[Not Created]
Basic Test	[Not Created]
Cash Advance	[Not Created]
Current Short Mortgage Lead 3	Thank you for your interest in Clickpointsoftware
Debt	[Not Created]
Education	[Not Created]
Health Insurance	[Not Created]

Double Opt-In Landing Pages

Edit | Remove

Lead Type	Name	Page Created
Automotive Warranties		Not Created
Basic Test		Not Created
Cash Advance		Not Created
Current Short Mortgage Lead 3	SalesExec Landing Page	Yes
Debt		Not Created
Education		Not Created

Double Opt-Out Landing Pages

Edit | Remove

Lead Type	Name	Page Created
Automotive Warranties		Not Created
Basic Test		Not Created
Cash Advance		Not Created
Current Short Mortgage Lead 3	SalesExec Opt out	Yes
Debt		Not Created
Education		Not Created

Templates

Double Opt In

→ The Template will show you a list of all the system fields that you can add to your HTML template.

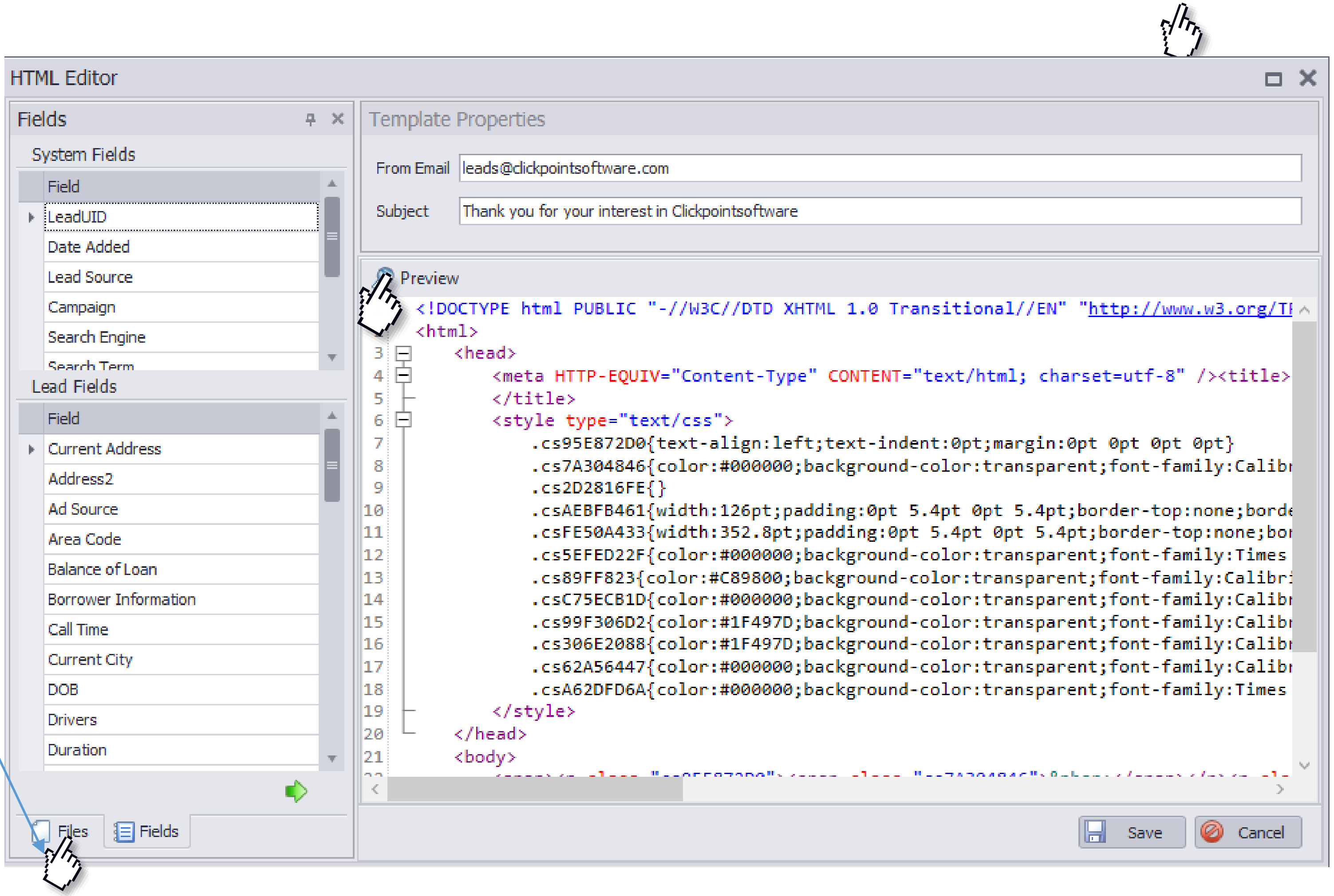
→ The From Email will show your lead where the email came from.

→ The Subject line will determine the subject of your email.

→ The Template has to be written in HTML. Click on the *Preview* Tab to show what your HTML email looks like,

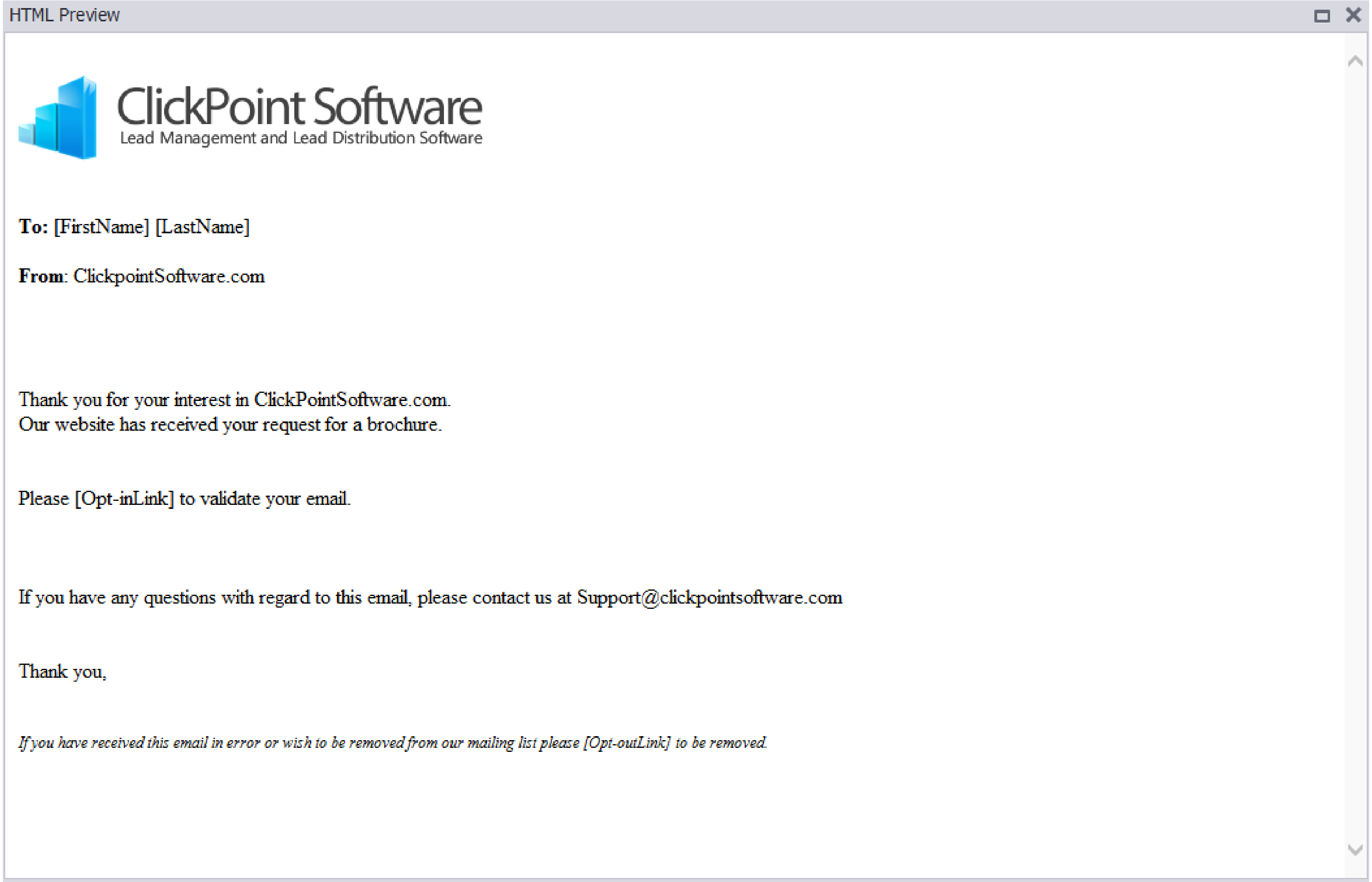
→ You also have the ability to upload files, such as images in order to link them in your HTML

→ *Note* All Editors are the same. They just have different functions.*



Templates

Double Opt-In Preview

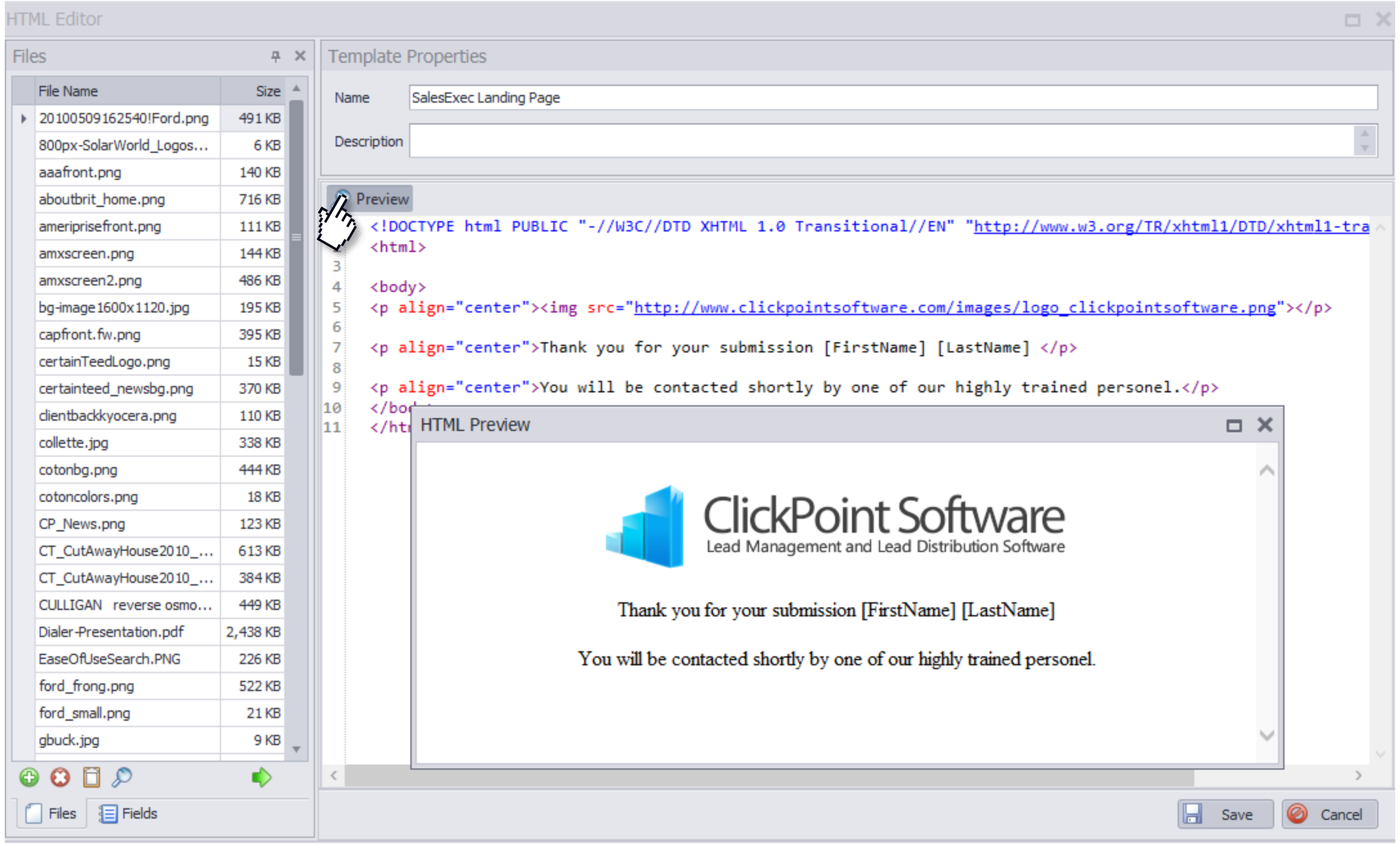


Templates

Double Opt-In landing page

→ The landing page is the page the lead will be redirected to if the lead selects the opt-in feature on the opt-in email.

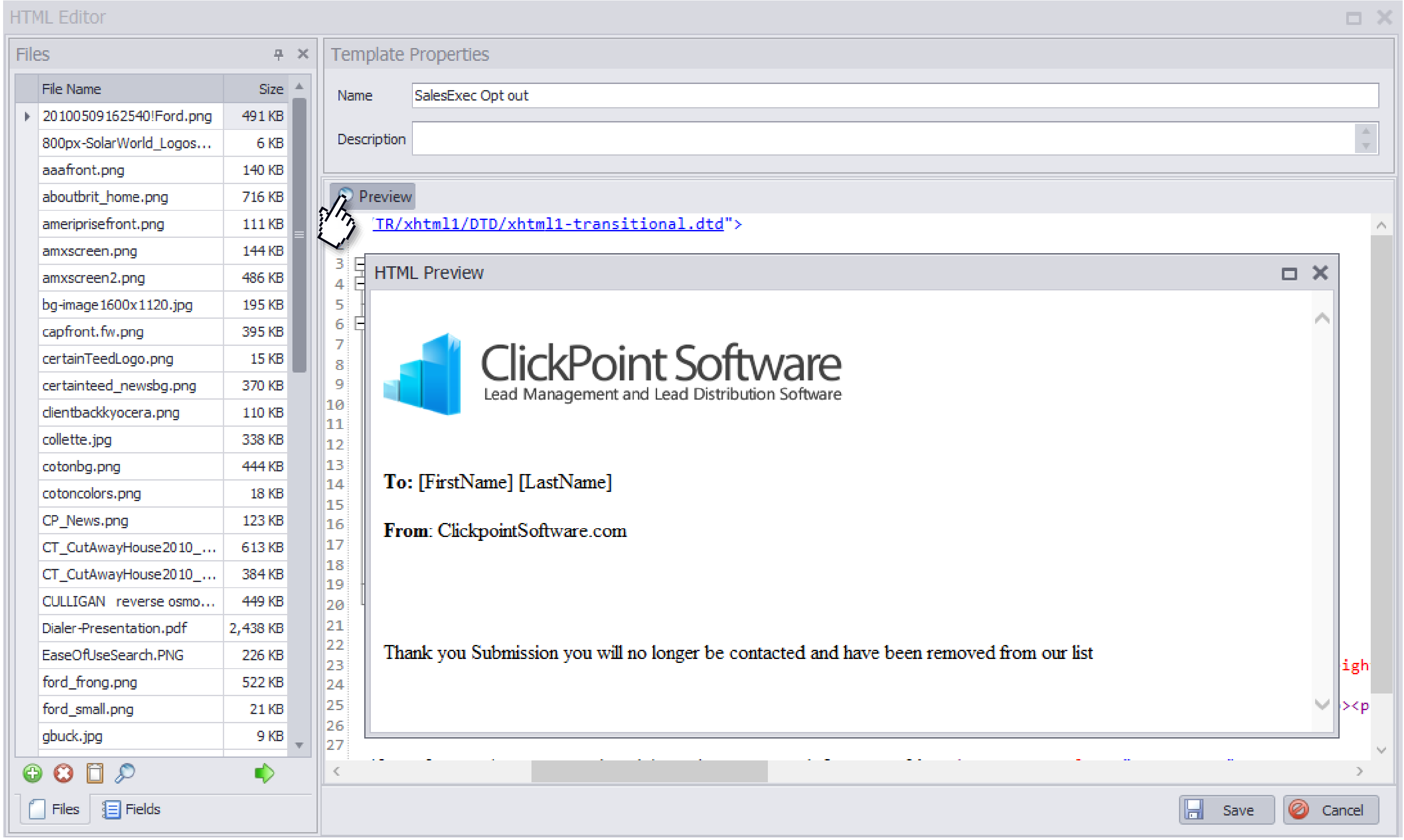
→ You can also see the preview for this email as well.



Templates

Opt Out Email

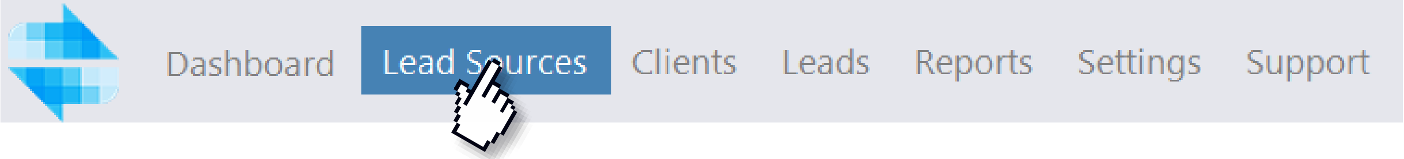
- → The Opt-out Email will be the email shown if the lead decides to opt out of the program. You can also preview the template by clicking on preview.
- → Once the Templates are set up, you must now go to your campaigns to enable them for double opt-in use.



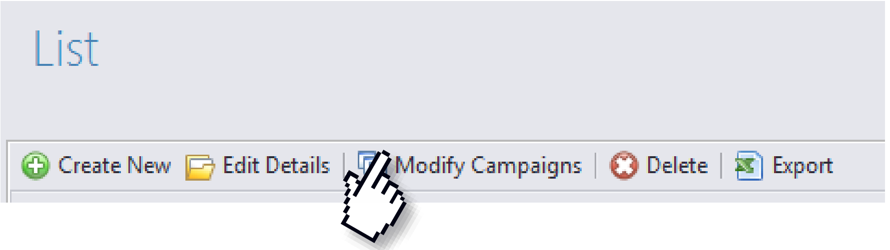
Templates

Setting Up Double Opt-in.

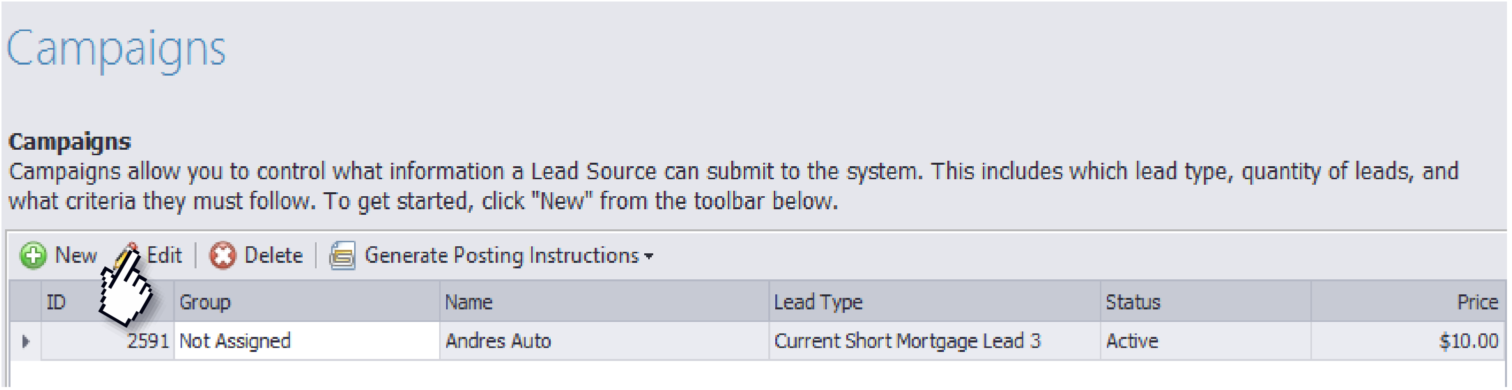
To set up Double Opt-In for use. Click on the *Lead Sources* tab.



→ Select a lead Source, and Click *Modify Campaigns*.



→ On the Campaign Screen click *Edit*.



Templates

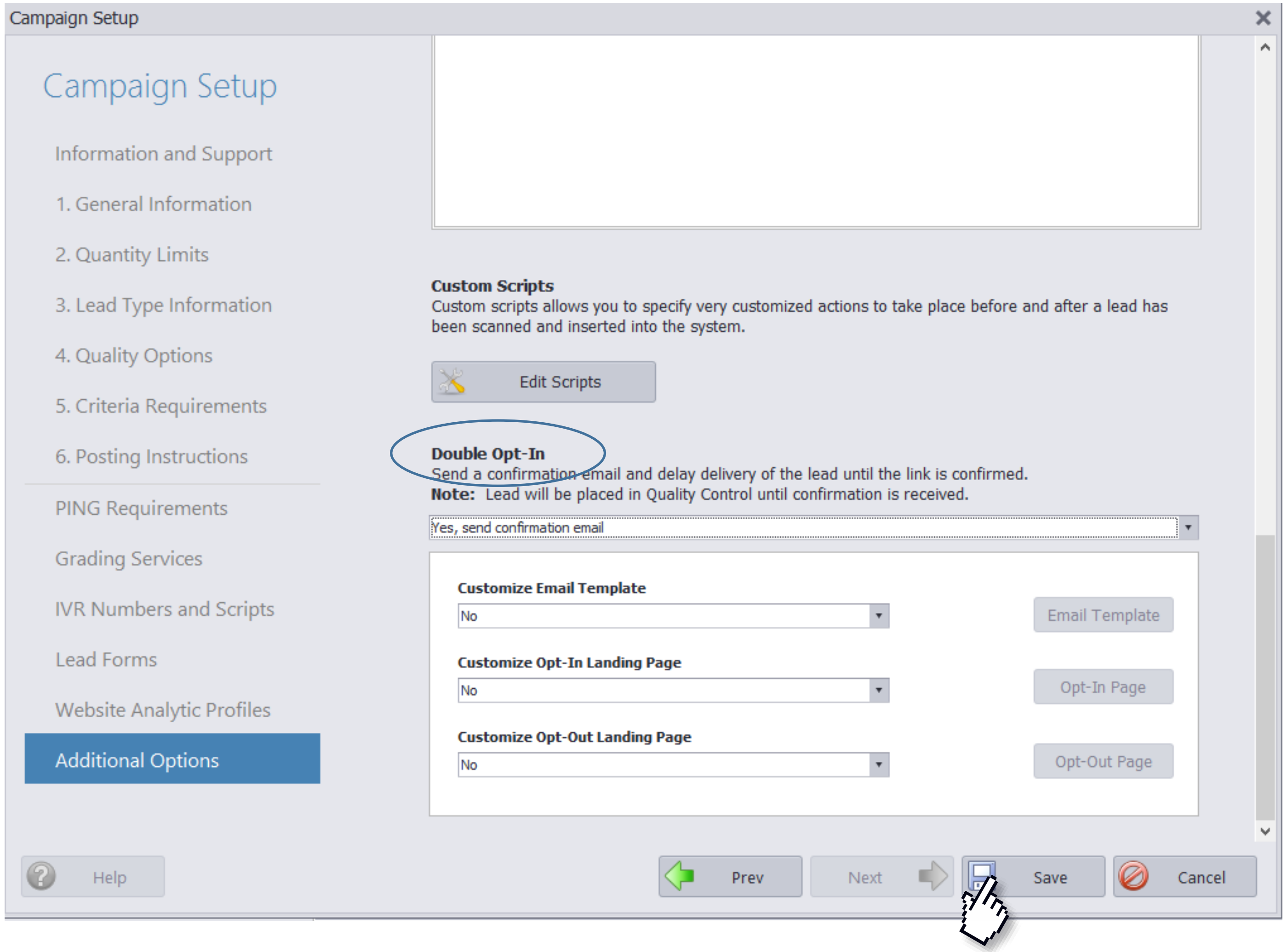
Double Opt-in Setup (cont.)

→ In the Campaign Setup Menu Click on *Additional Options*.

→ Scroll down Until you can see Double Opt In

→ Set the Option to Yes and Click *Save*. By default setting the campaign to "yes" will use the templates you created under your settings section of LeadExec

→ *Note* You can customize the email templates for this particular campaign by setting the options to "yes" under each particular item. This will change the emails and landing pages for this campaign only.*



F.A.Q.

- → **Q.** I just created a client and I cant see it, why?
  - → **A.** When creating a new client the status may be set to new, in order to view this in the client list, ensure that the "status" dropdown on your client list is set to show all.
- → **Q.** Do I need to fill out ALL of that contact information to continue?
  - → **A.** No, all you need is an email, however it is recommended you put in as much information as possible.
- → **Q.** How do I give this client access to the client portal?
  - → **A.** You can assign a username and password under the web portal options.
- → **Q.** What does setting a client to inactive do?
  - → **A.** Setting a client to inactive will ensure that no leads are delivered to that client. Any status other than "active" will not deliver leads to that client.
- → **Q.** How do I set criteria on this client?
  - → **A.** All criteria is set on the delivery accounts, under the criteria step.

Setting Pivot Grid Reports

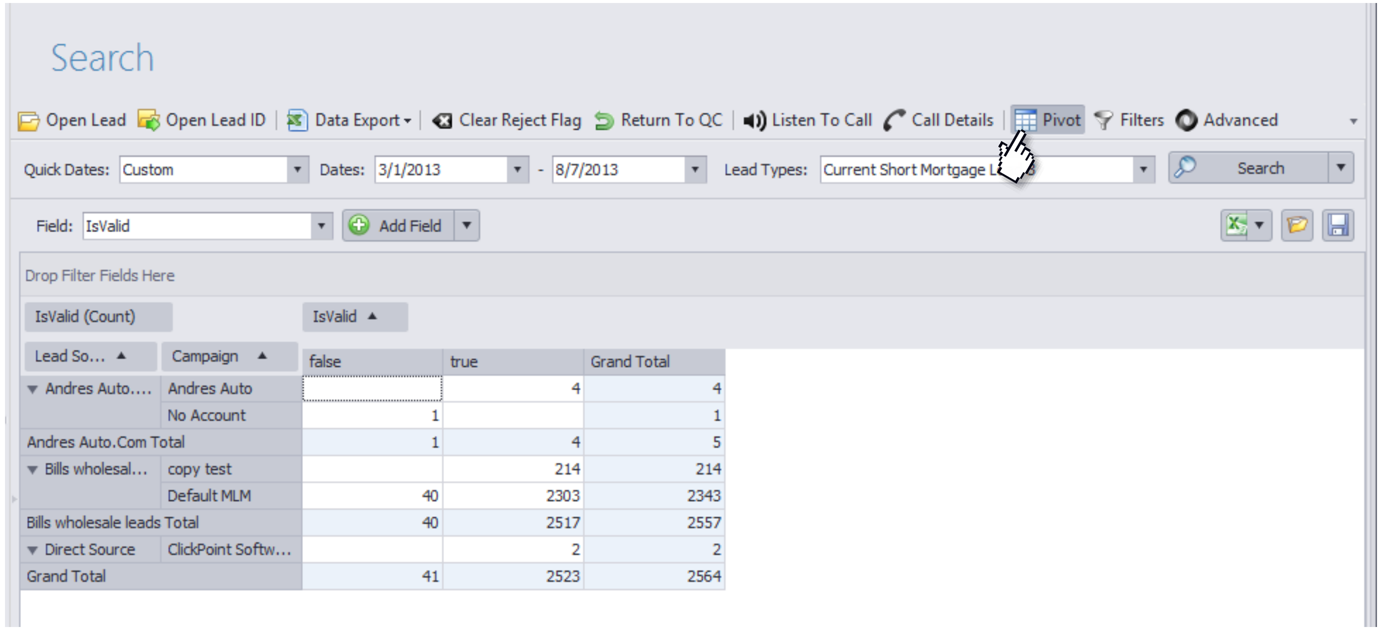
Why is this important?

Pivot grid reports allows you to create custom reports on the following Screens:

- Search All Leads
- Maximizer
- Distribution

Pivot grids can be used to obtain reporting otherwise not offered by the system. To create a pivot grid report on any of the following screens, click on *Pivot*.

Note pivot grid reports can only be built for 1 lead type and 1 screen at a time*



Pivot Grid

Step 1. Navigating the pivot grid screen

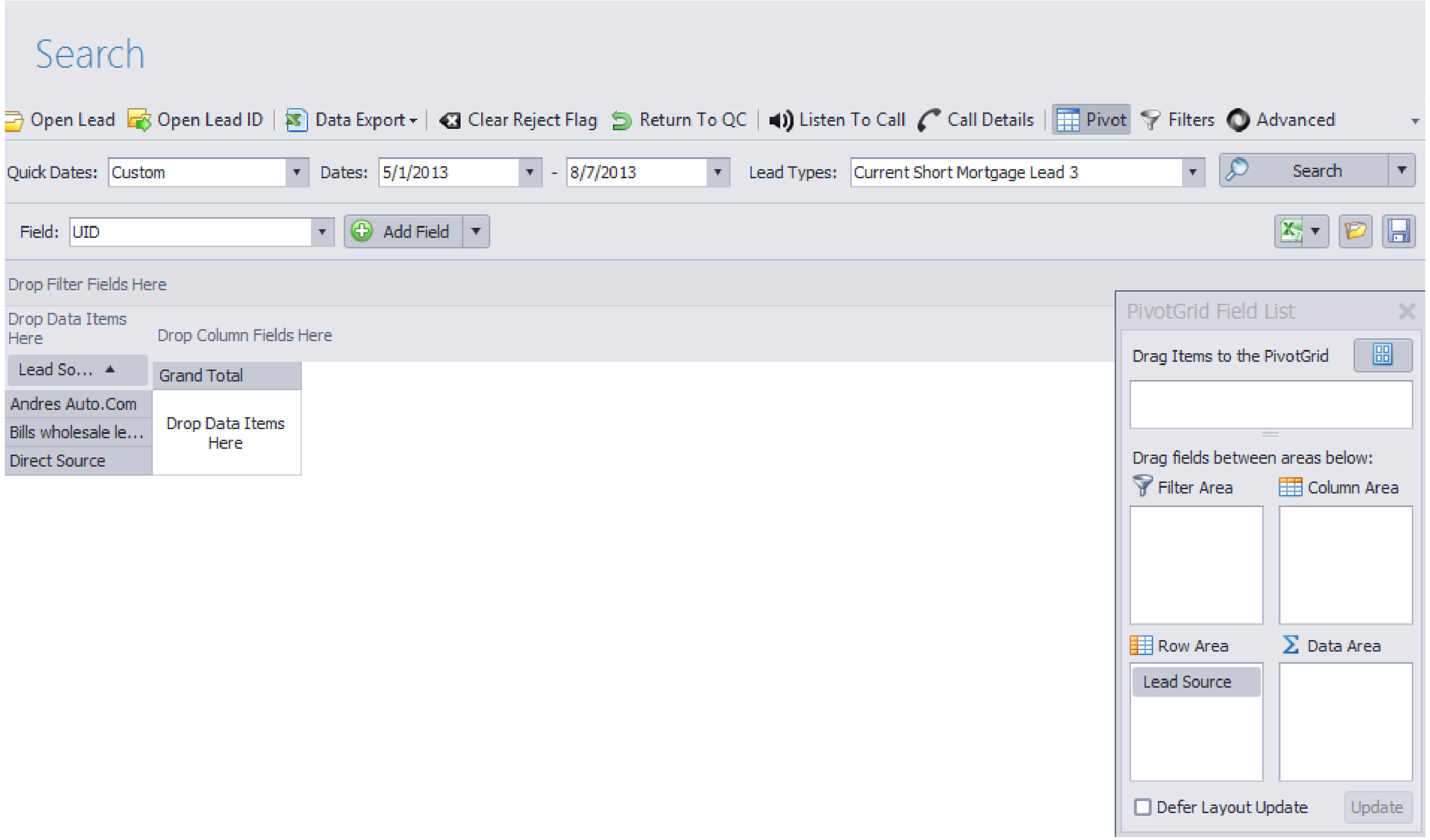
When you first create a pivot grid screen there will not be any data populated, in order to begin populating data first select the field you want to use as either a:

- Row Item
- Data Item
- Column Item

→ To begin setting one up, click the *field* dropdown and select *leadsource.*

→ Once selected, click on the add field dropdown arrow and select Row Items. You should now see the names of your sources

Note if you do not see your source names, change the dates. There may be no data for those sources on the date range you have set.*



Pivot Grid

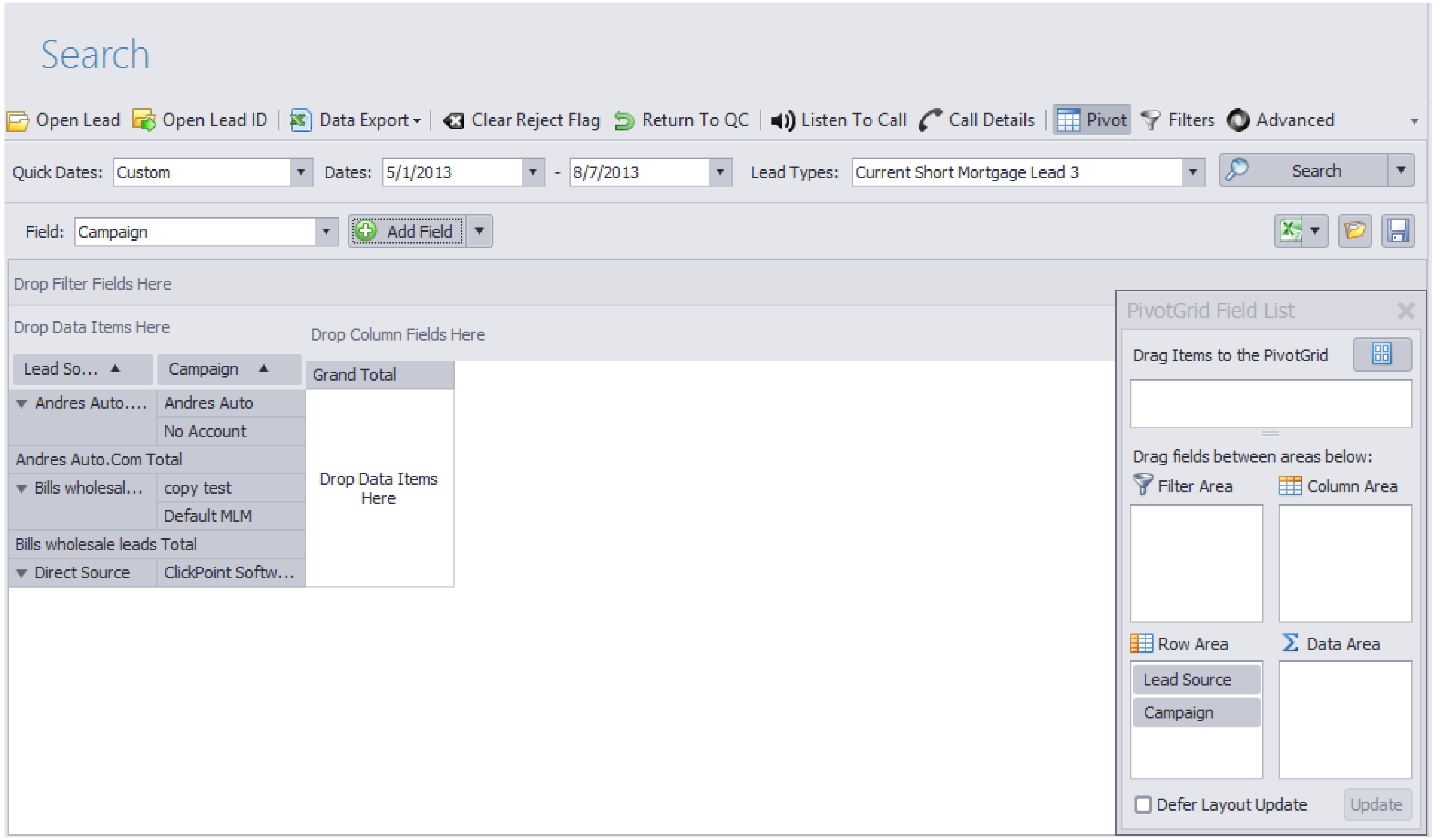
Step 2

→ Next lets add some campaigns.

→ From the Field Dropdown, look for the *campaign* field.

→ Select the arrow on add field and set it as a row item to add the campaign.

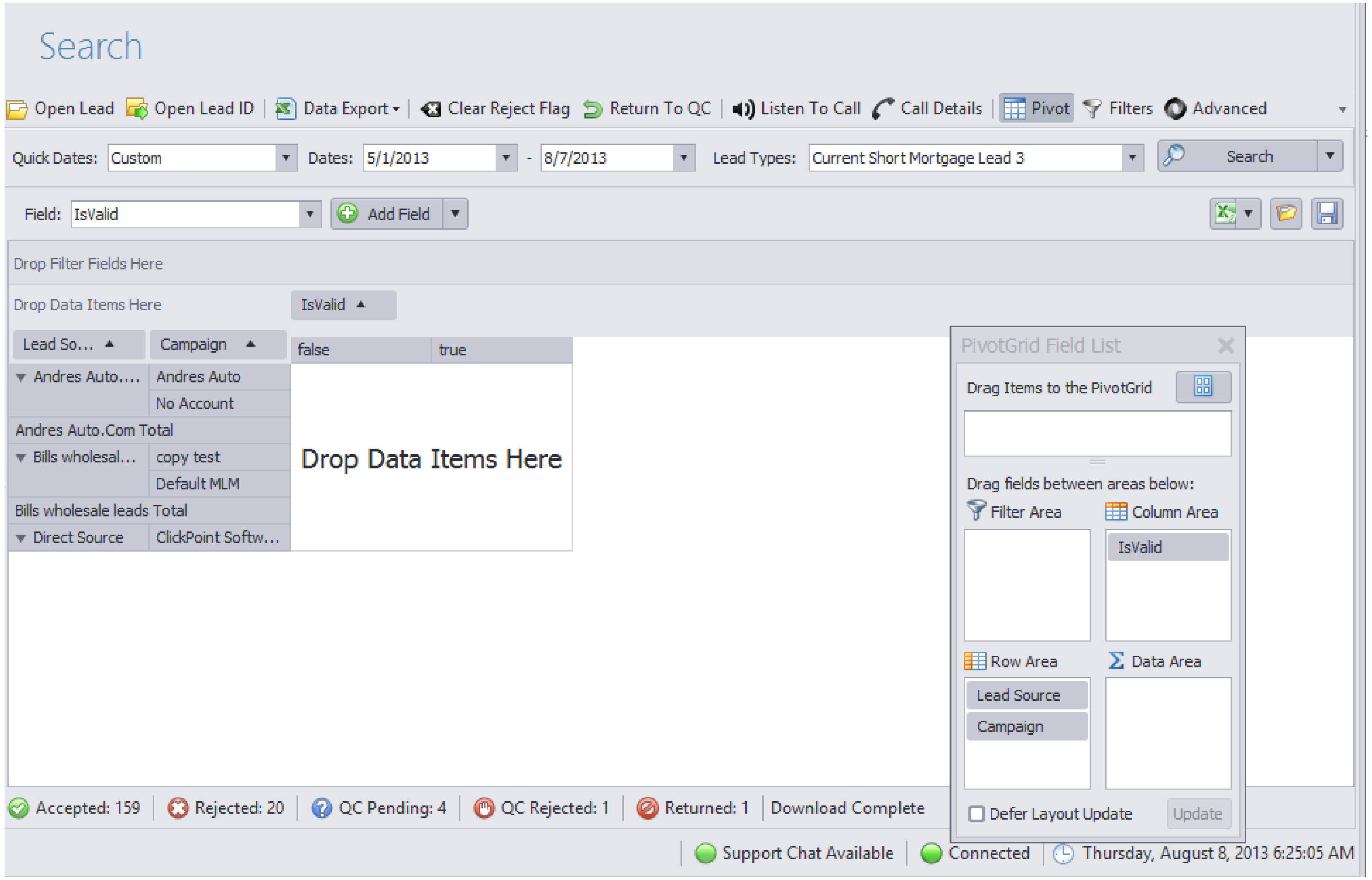
→ Once completed, your Pivot Report should start to look like the example provided.



Pivot Grid

Step 3

- → Next, let's say you want to sort by all your Valid and Invalid Leads. To do this you want to select the *is valid* field from the dropdown
- → Add field as a column
- → You should now see a True/False appear, that is requesting data items.

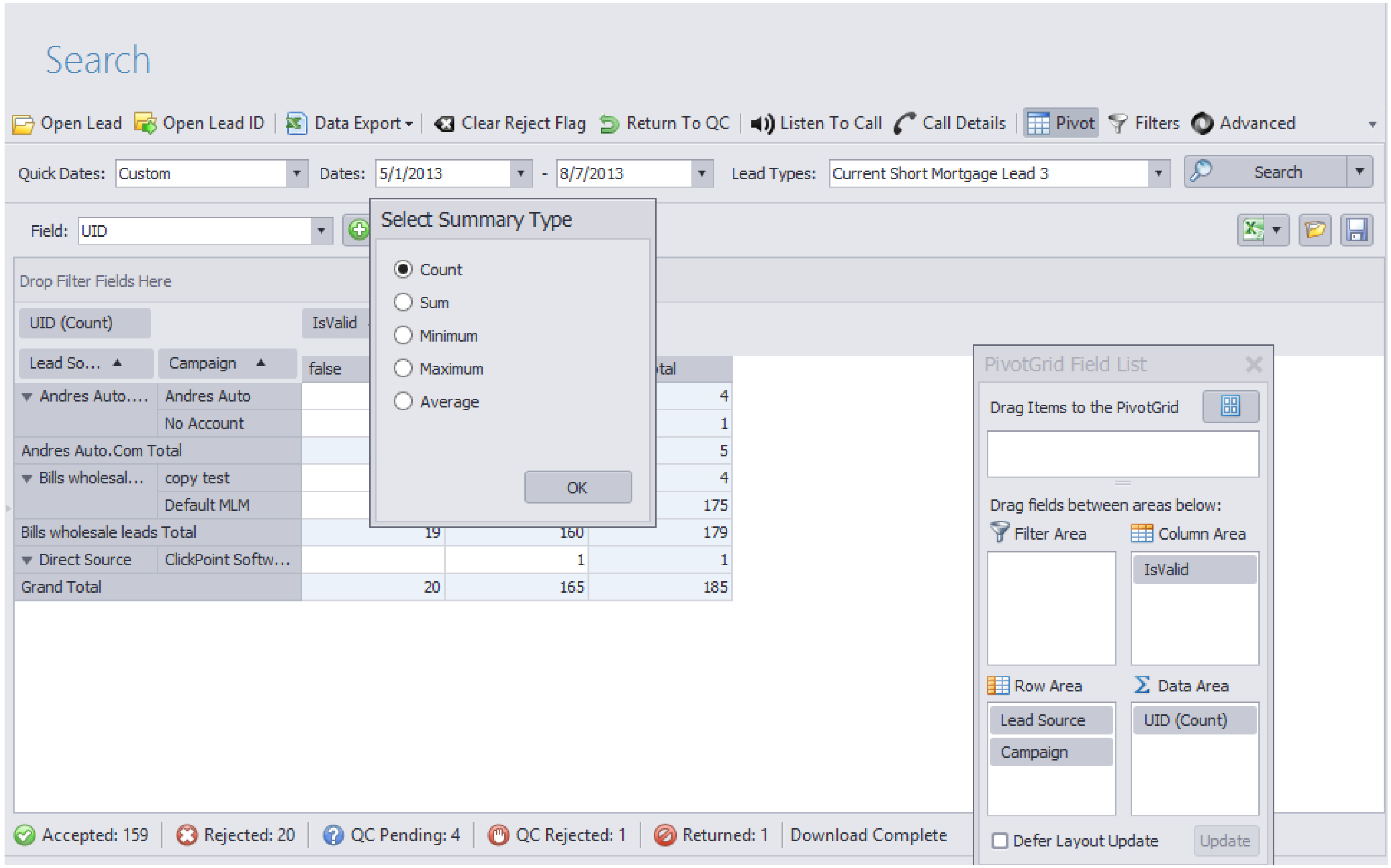


Pivot Grid

Step 4

→ The next step to take is to get your counts. To do this we want to add the *uid* field.

→ When you add a field, add it as a data item, and select *count*, click *ok* to have the pivot grid begin displaying data.



F.A.Q.

- → Q. Why isn't my PivotGrid displaying data?
  - → A. If your grid is not displaying data, try editing the date range you are viewing. It may be that there is not data to display.
- → Q. How do I hide a field?
  - → A. To hide a field you can right-click on the field box, i.e. the item that says *leadsource* and select hide to make it not appear.
- → Q. Why doesn't my PivotGrid report show up under a different screen?
  - → A. PivotGrid reports are specifically tied to the screen they are created on. They do not cross screens.
- → Q. Why won't my PivotGrid show up under another lead type?
  - → A. Pivot Grids are also tied to the Lead Type they are created under. You cannot view a grid created from one Lead Type in another.
- → Q. I can't find a field from my LeadType in the field dropdown?
  - → A. If you are unable to find a field, ensure that the field groups for your leadtype are in place to ensure the field can be displayed correctly.

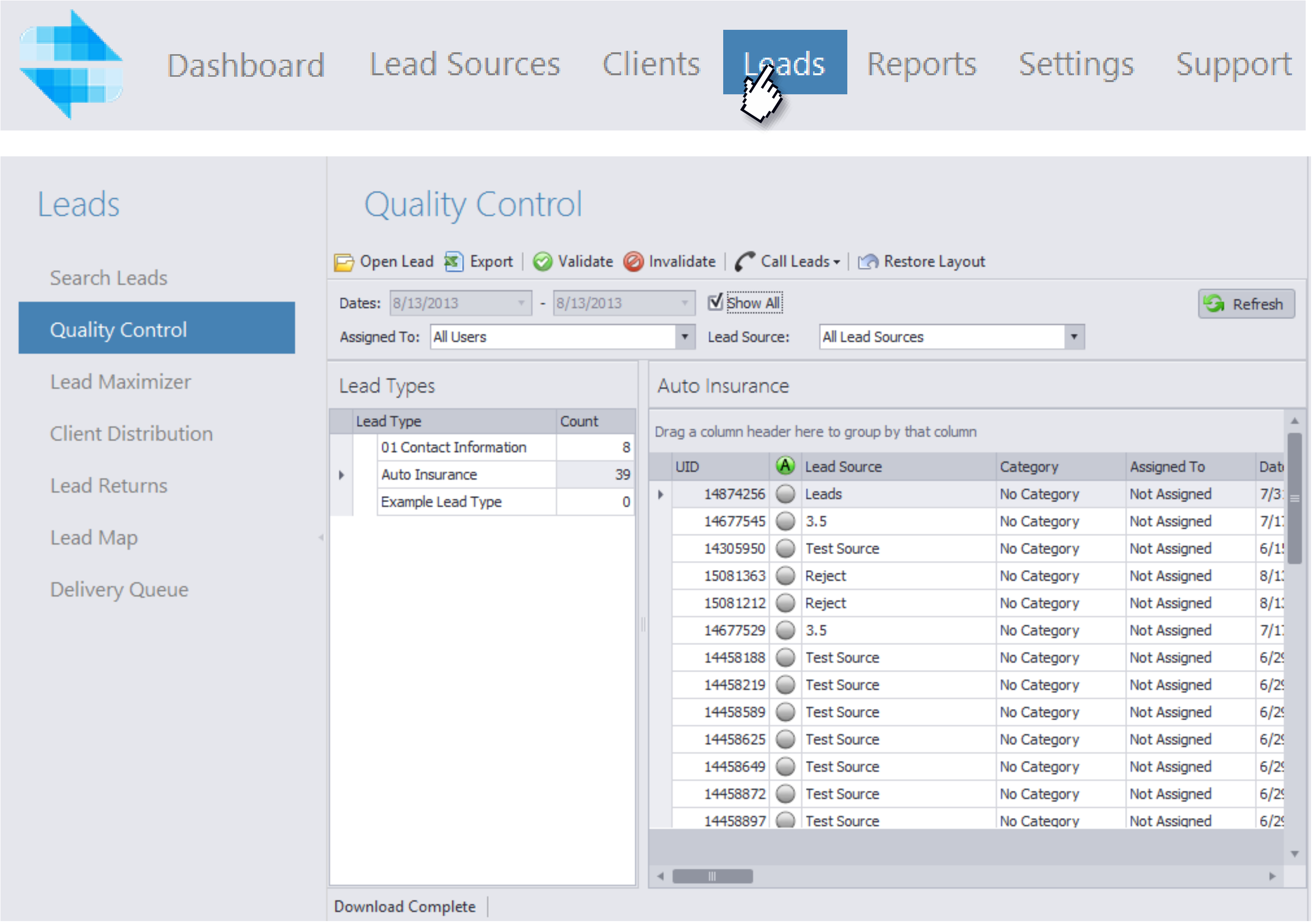
Setting Up Your Quality Control Dialer

Within LeadExec you have the ability to use our Quality Control bin to call leads and validate their information.

→ To get to your quality control bin Select the *leads* Tab

→ Select *Quality Control*

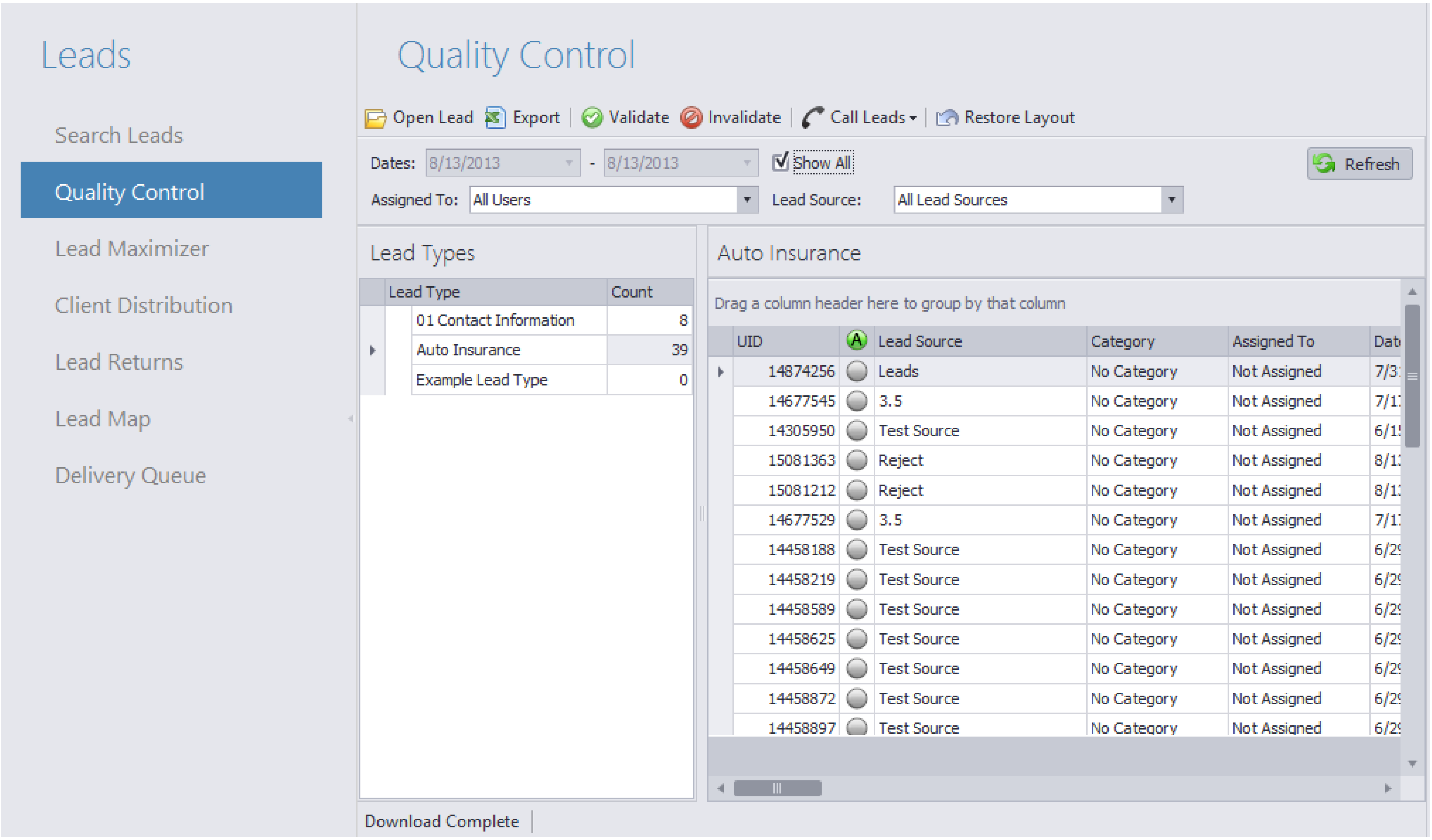
Note You must have an Xlite phone with an SIP provider or Skype to place calls.*



Calling your Lead

From the Quality Control Screen, select a lead you wish to call and hit Call Leads. There are two options you can use:

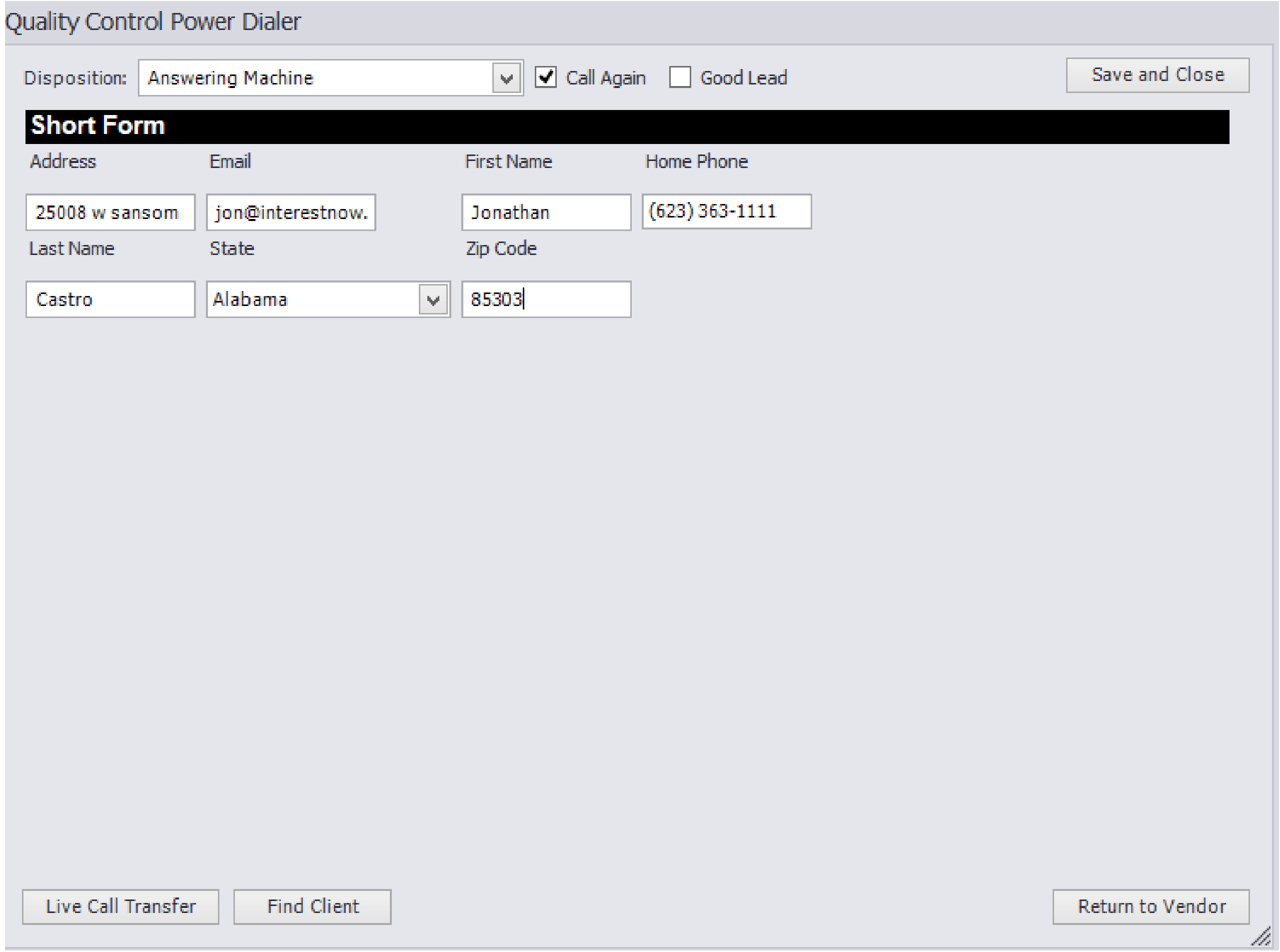
- *Call Selected* – will call the lead you currently have selected.
- *All Leads Shown* – this will call all leads that you have in your quality control bin



Quality Control Power Dialer

When viewing your lead inside of the Quality control power dialer you can do the following:

- Edit your Lead Information by simply clicking in the text box and changing information
- Mark it as a good lead
- *Disposition* the lead, i.e. whether you received an answering machine, a call back time, or if the lead is a bad lead.
- *Live Call Transfer* – use this feature to transfer your lead to an agent for your client.
- *Find Client* – find the proper client for this lead to be delivered too
- *Return to vendor* – Return this lead to your vendor if it is bad or not sellable.
- *Save and Close* – save your current information, if marked as a good lead the system will move this lead through automation and be delivered to your clients.



F.A.Q.

- Q. My Dialer is not opening
  - A. If your dialer is not opening, ensure that you have minutes available to make your call, also you will need to make certain that your provider is set to the default dialer for windows.
- Q. Find Client Is Not Displaying any clients
  - A. If you are having trouble finding a particular client, ensure that they are an active client, accepting leads from the lead type selected. If using order, make sure the order is not ful.l
- Q. I can't do a live call transfer.
  - A. Ensure that the client you are wanting to do a live call transfer for, is set up to receive leads for live call transfers.
- Q. Can I type in my own reason when returning the lead to a source?
  - A. Yes, you can input your own reason for returning a lead by typing in the check box.
- Q. How do I deliver my lead?
  - A. To deliver the lead, mark it as a good lead, then select the save and close option

Setting Up Client Grouping

→ Client Groups can be used to group existing clients in your system to control delivery. With client groups you can

  → Send leads to Clients while having only 1 method.
  → Assign multiple clients to 1 delivery.

→ To begin setting Client Groups Select *Clients* (see Figure 1)

→ Select *Client Groups* (see Figure 2)

→ Click *new*

Figure 1: Select the *Clients* tab

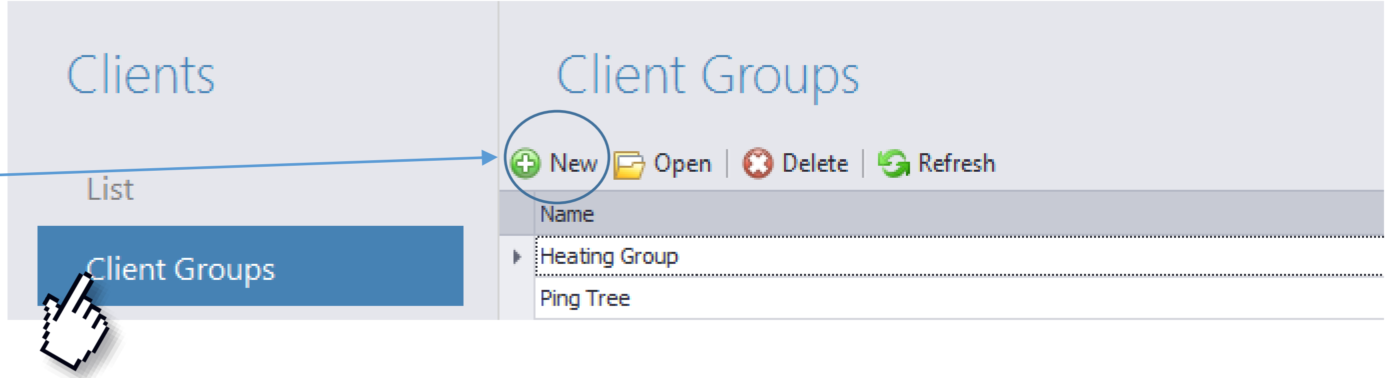
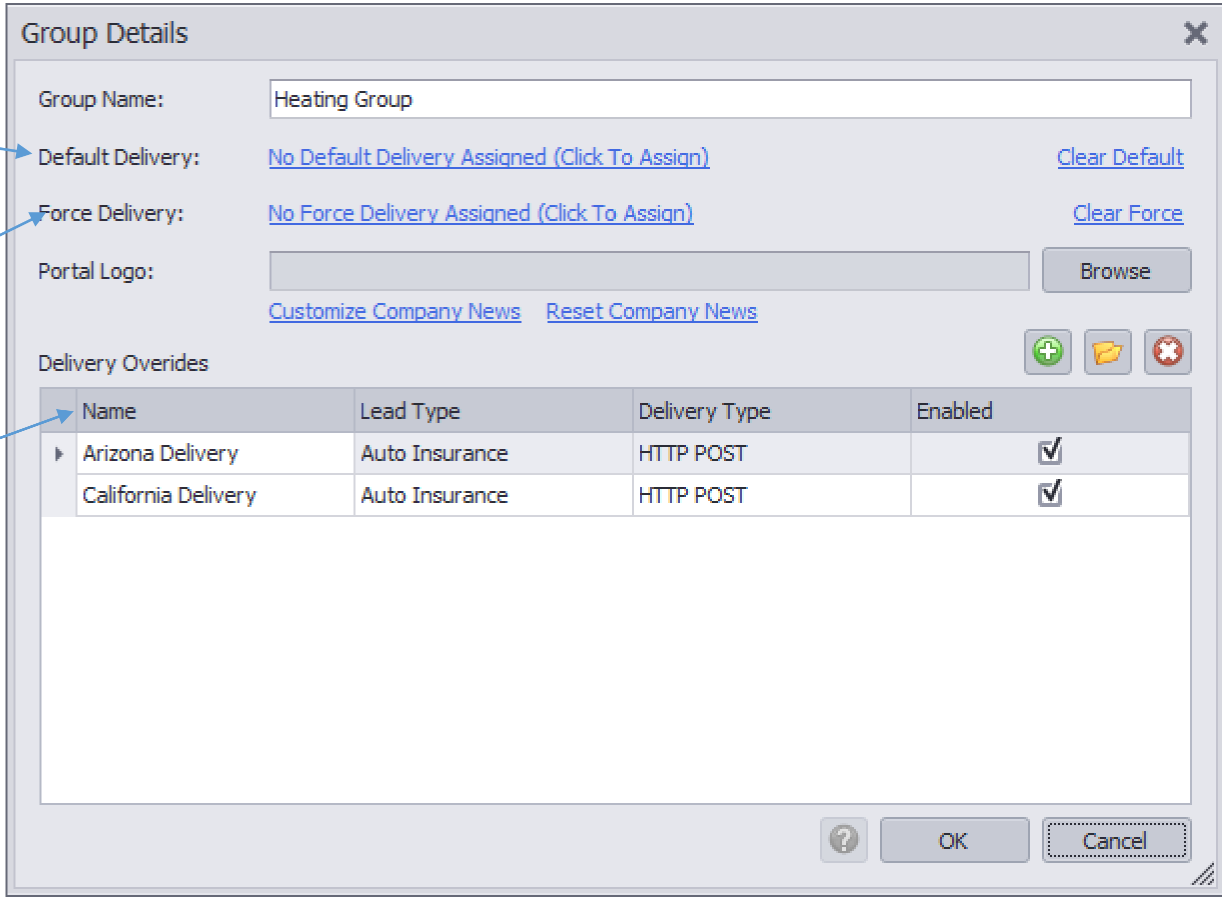


Figure 2: Selecting *Client Groups*

Navigating a Client Group Setup

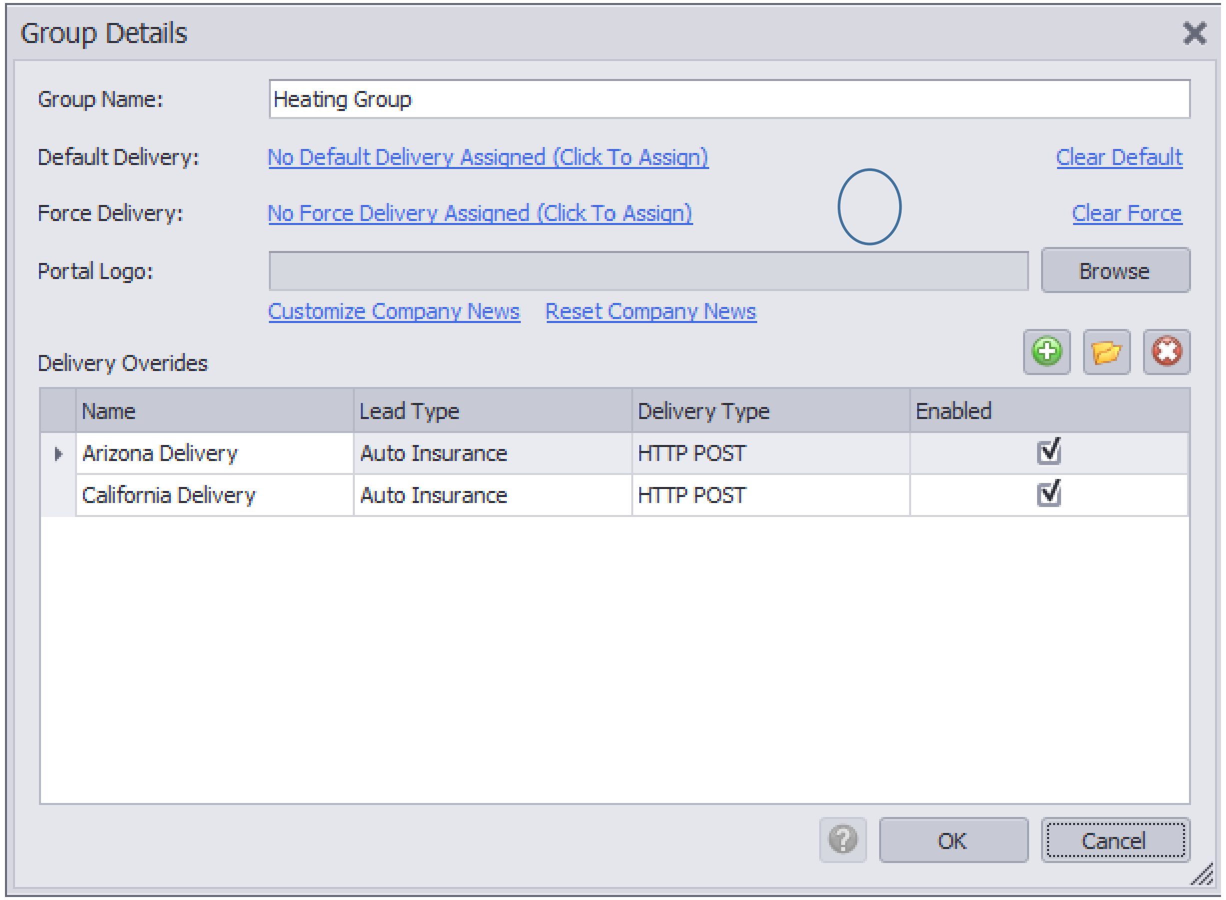
→ Inside your Client Group you can assign

- Default Delivery – This will be the main delivery method your clients use when assigned to a client group. This is set up like a normal client Delivery. *(Please refer to Setting Up Client Delivery for more details)*
- Force Delivery – This will force the delivery of a lead and will override the default delivery *(Please refer to Setting Up Client Delivery for more details)*
- Delivery Overides – These can be assigned to Overide the *Default Delivery* to a client if certain criteria is met
- Customize Company News – Allows you to customize the news section for clients in this group (Reset Company News Will clear out existing Company News)



Setting up Delivery Overrides

→ To Set Up and Override, Click on the *Green* Add Button. This will populate a Normal *Delivery Method Setup*. However, with one difference, you can now add criteria.



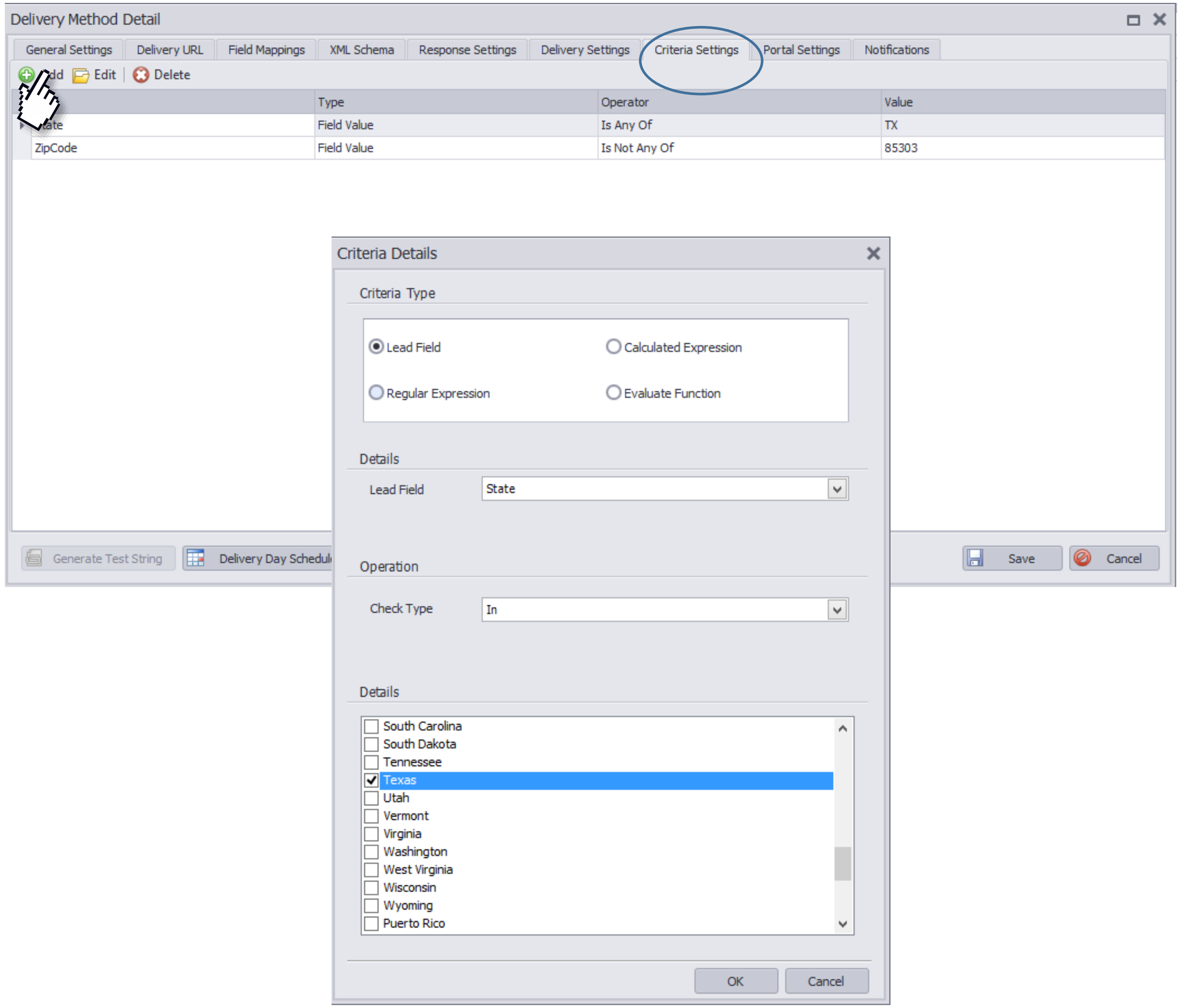
Adding Criteria to Overrides

→ To add criteria to an Over Ride Delivery Click on the *Criteria Settings* Tab

→ This will populate a screen, for you to select criteria.

→ To Add criteria, Click on the ***Add*** Button

→ Select the lead field you want to run criteria on, input the value and click OK



F.A.Q.

- Q. What Is Client Grouping ?
  - A. It is a way to create categories for your clients, such as national clients vs local clients. Or a way to centralize delivery to a set of clients.

- Q. How do I use the Client Group Delivery Method?
  - A. Inside of your Delivery Account, ensure that under Delivery Options you have group default selected.

- Q. How do I assign a client to a group?
  - A. First open the client, next in system properties, assign your client to the proper client group.

Setting Up User Permissions

→ Within Lead Exec our system offers users the unique ability to create permission groups for your users. What these groups do is ensure that users in your system can only see what permission groups they are assigned to.

→ To start creating a permission group click on the *Settings* tab.

→ Select *Permissions* to see your User Permissions.

→ Click *New* to create a new group

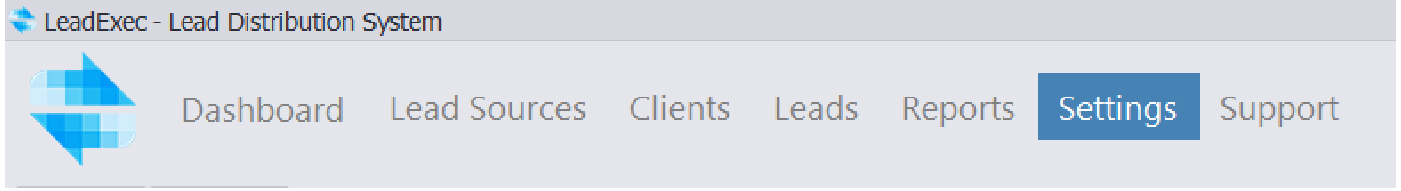


Figure 1: Selecting your *Settings* tab

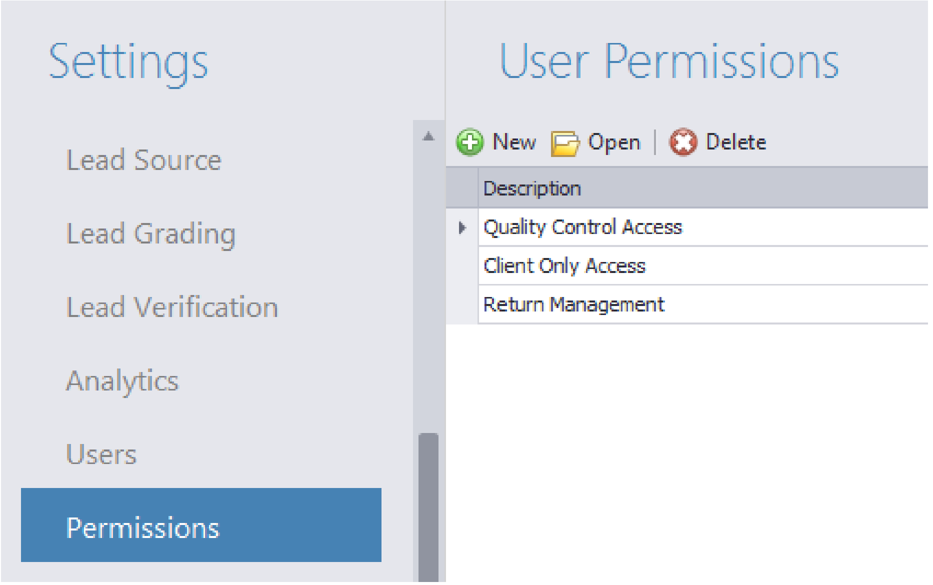
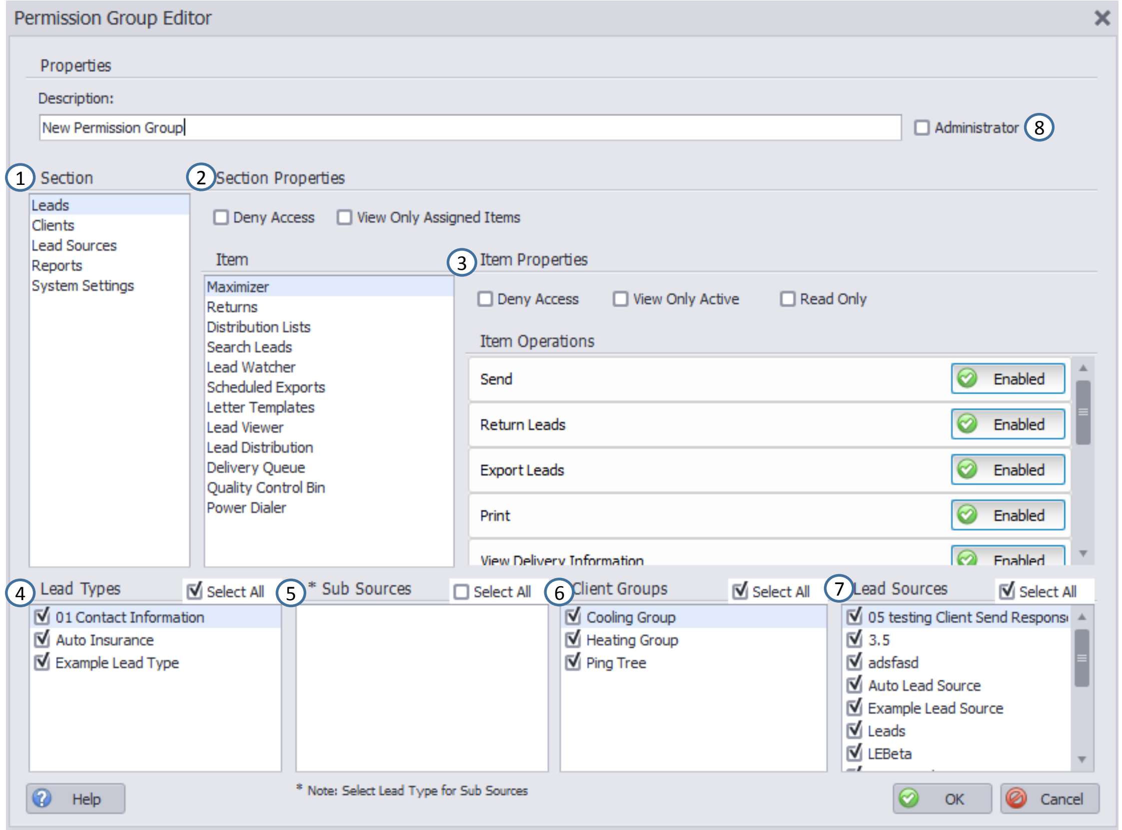


Figure 2: Viewing your Permission Groups

Permissions Group Editor



1. Section – This will list the section of the system you will be assigning permissions for. The 5 main items are:
   - Leads
   - Clients
   - Lead Sources
   - Reports
   - System Settings

2. Section Properties – This will list all the items under that particular Section.
   - *Deny Access* – checking this will ensure your user cannot see anything for that section
   - *View only assigned items* – if this is checked your user will only see items or leads assigned to that user

3. Item properties – This will show you all the actions/ items that a user can do on that screen and whether or not they can be enabled or disabled
   - *Deny access* – Will deny access to the item selected
   - *View Only Active* –
   - *Read Only* - Allows users to only view the data, but not interact with it

4. Lead Types – Select the lead type users should be able to see

5. Sub Sources – If you use Sub-Sources you can check those here

6. Client Groups – Allows users access to your client Groups

7. Lead Sources – Allows you to control the lead sources your client sees

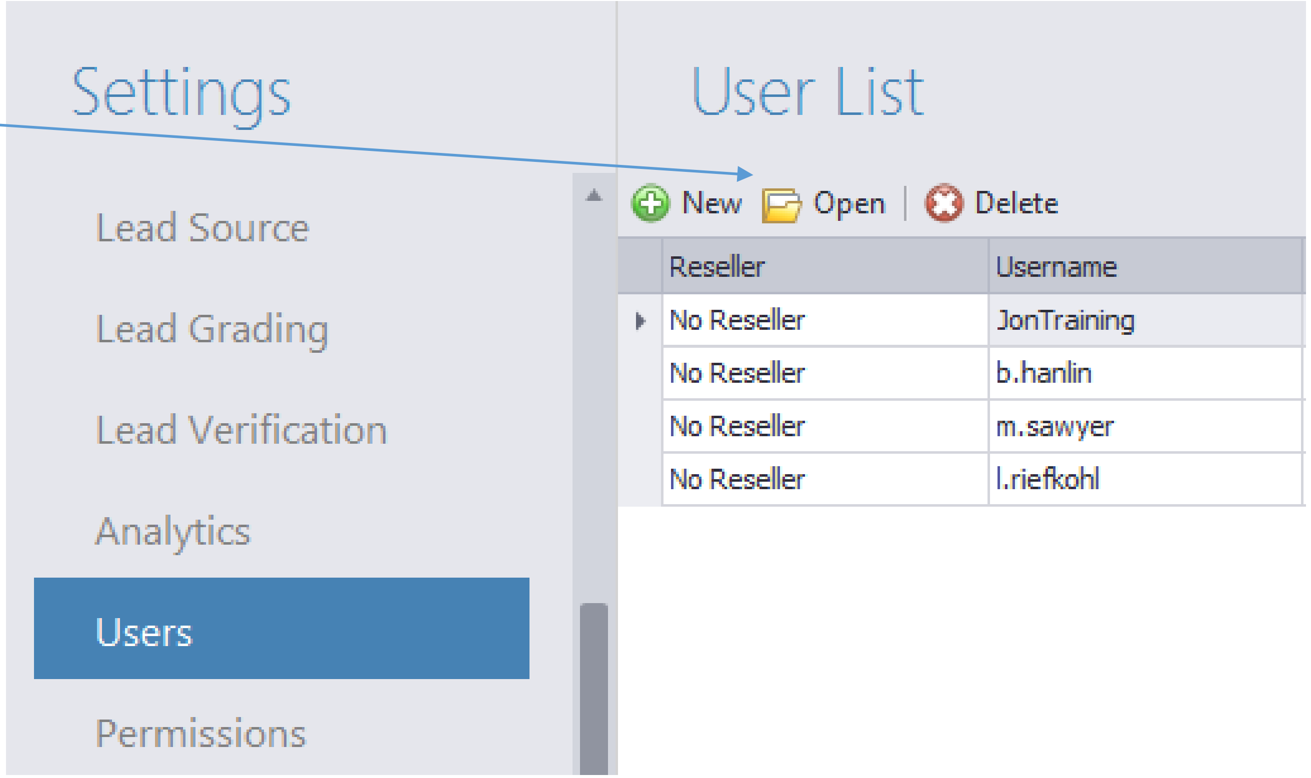
8. Administrator – Gives the user administrator privileges

   Note not assigning a user to a permission group makes them an admin by default*

Assigning a User to a Group

→ To assign a User to a group, Click on the *Users* tab right above permissions.

→ Select a User and Click *Open*

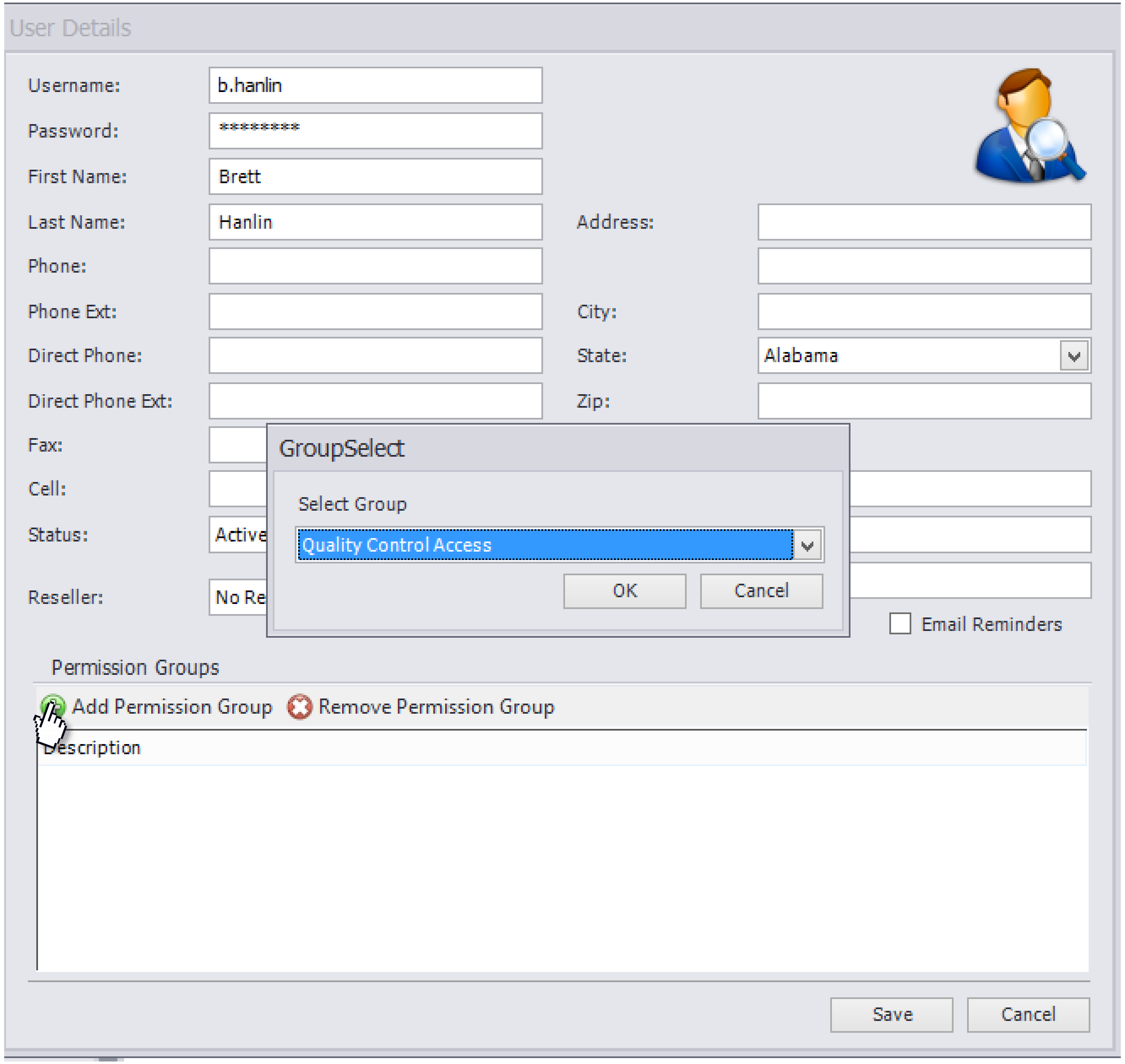


User Details

→ From the User Details screen, click on *Add Permission Group.* A dropdown box will appear for you to select the appropriate group from. Select your group.

→ Once your group is selected Click *Ok*

→ Click *Save* to make your changes



F.A.Q.

- → **Q.** Can I create a user that only views the QC?
  - → **A.** Yes, the settings for a user to view the QC will be like this:
    - → Deny Access to: Clients, Lead Sources, Reports, System Settings
    - → Under the Leads Section -> Item Properties Deny Access to Everything but Quality Control Bin and Power Dialer

- → **Q.** Do I need to check the administrator box for administrators?
  - → **A.** No, if you are creating an administrator simply leave the user unassigned to a group since by default the system will assign administrator permissions.
- → **Q.** My user can't view assigned items, why?
  - → **A.** If a user cannot view any leads, ensure that their campaign has been assigned to that particular user, or manually assign inside of the Quality Control Bin.

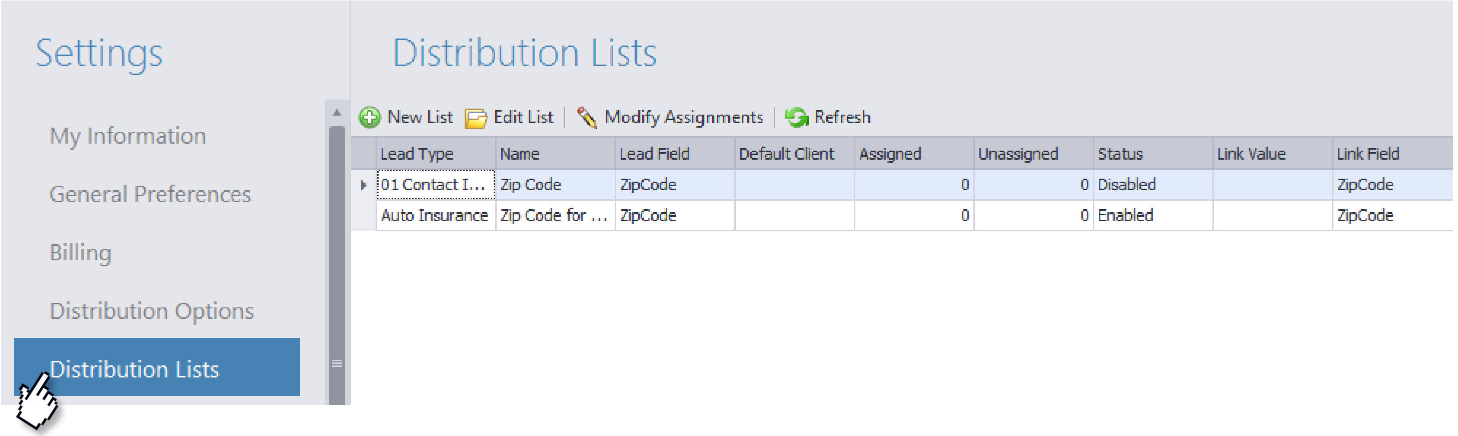
Setting Up Distribution Lists

Distribution lists allow LeadExec to create a list of criteria that you can use for general client routing. Once a client is assigned to a list you can import their own routing logic for that client.

→ To set up a *distribution list* click on *settings.*

→ From the settings tab, click on *Distribution Lists*.

→ Click on *New List.*



Setting Up Distribution Lists

→ List Details – This is where you assign a description for your distribution list. Items of note must be set here as well.

→ LeadType – Select the lead type that this list will apply for.

→ LeadField – What field will this list be using for criteria

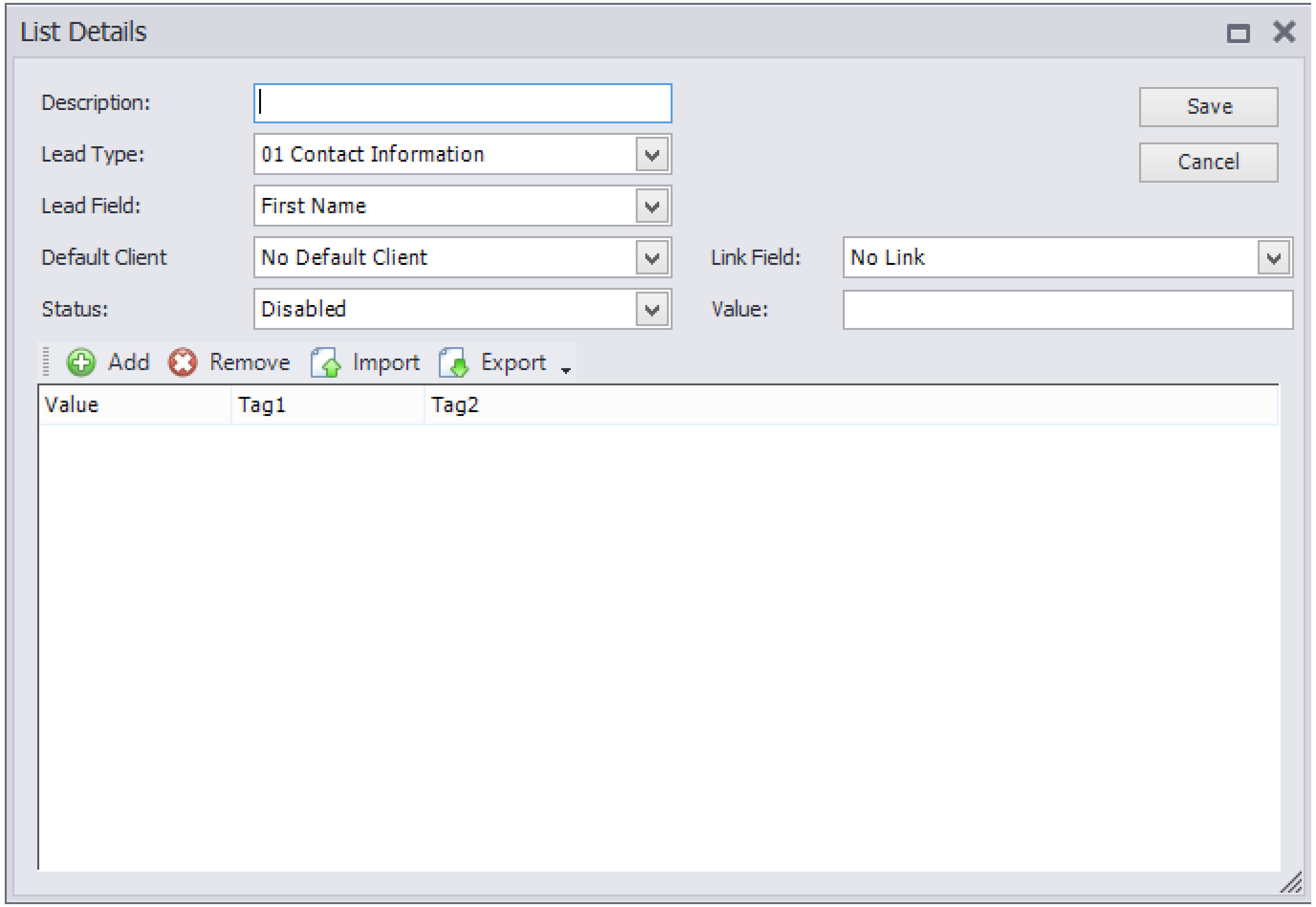
→ Default Client – Should this only be assigned to 1 client

→ Status – Enabled or Disabled

→ Link Field –

→ Value – Should there be a default Value

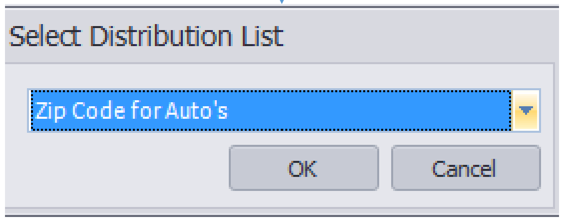
→ Add, Remove, Import, Export – use these to do any of the following actions. If you are importing a file, make sure that it is in a .xls format.

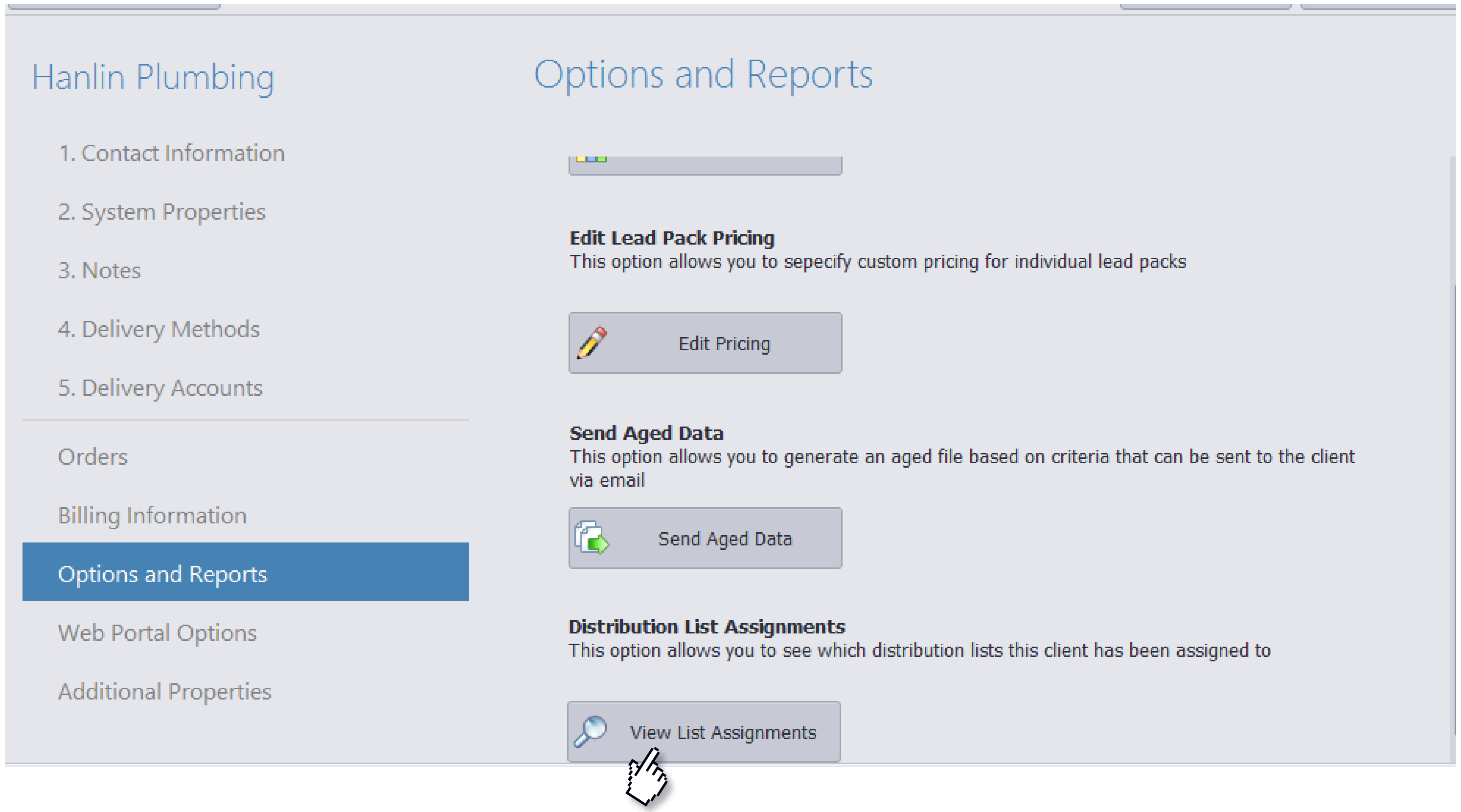


Setting Up Distribution Lists

- → To Set up a distribution list, open your client from the client list.
- → Select Options and Reports
- → Click View List Assignments.

Note when clicked, a dropdown will appear asking you to choose the distribution list this client should be tied to.*





Setting Up Distribution Lists

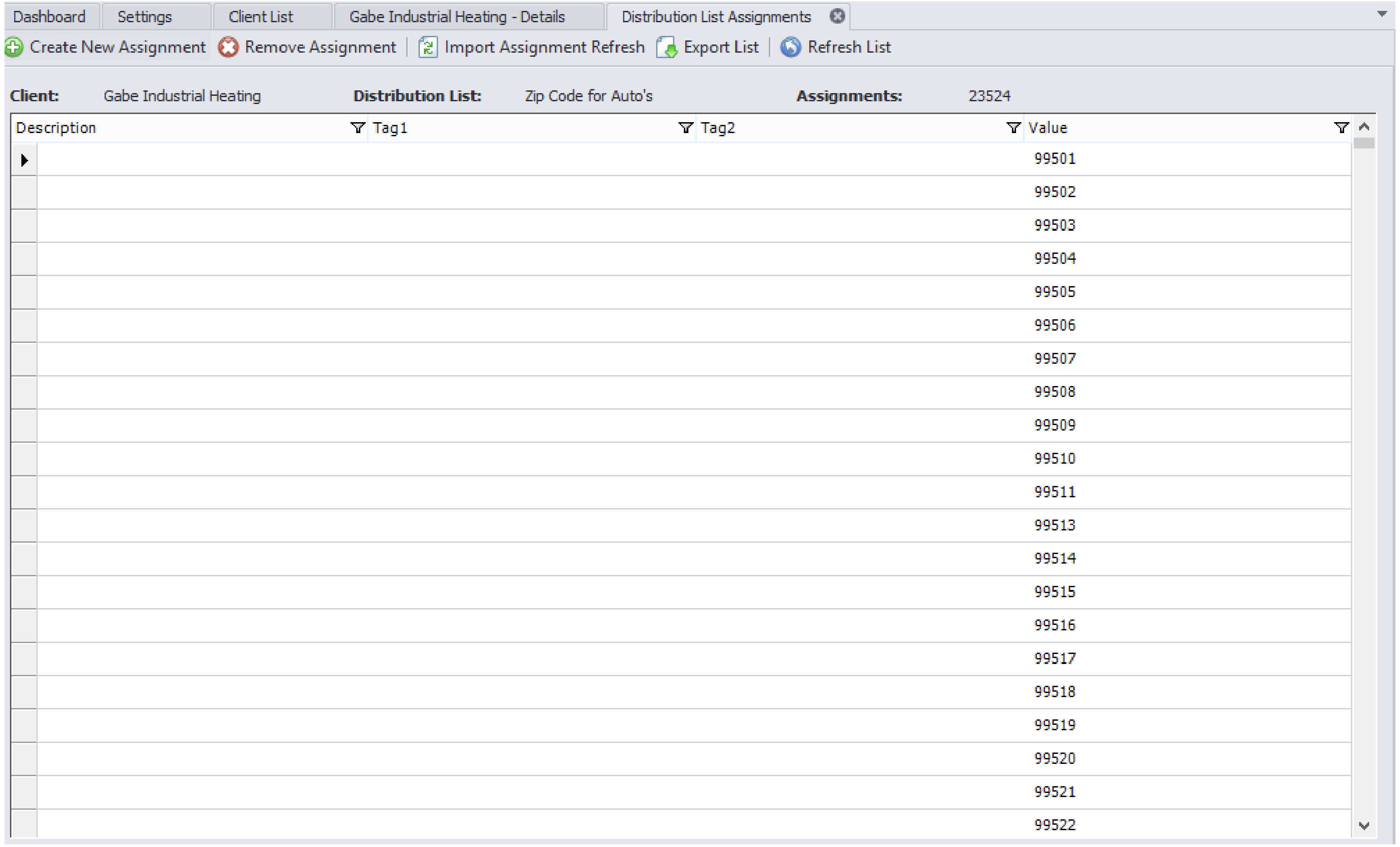
From the Distribution list assignments you will be able to do the following:

→ Create New Assignment – Will manually add an assignment to the list.

→ Remove Assignment – Will remove a value from the list.

→ Import Assignments Refresh – allows you to import an assignment, such as zip codes via an .xls file .

→ Export List – Will allow you to export the current assignment for future reference.



F.A.Q.

- → Q. Can I delete a Distribution list?
  - → A. Distribution lists cannot be deleted once entered into the system.
- → Q. Can I remove a client from a distribution list?
  - → A. Yes, you can remove a client from the distribution list by removing all of the assignments.
- → Q. My file won't upload properly.
  - → A. Please ensure that your file is in an .xls format and has no special formatting of any sort. If you are still experiencing problems please contact support via Support@clickpointsoftware.com
- → Q. Do I need to create a distribution list under settings first?
  - → A. Yes, all distribution lists must be created under the settings tab in order for the client to be properly assigned.
- → Q. Can I assign a client to more than one list?
  - → A. No, clients can only be assigned to one list at a time. They cannot be placed into multiple lists.

Analytics

Within LeadExec you have the ability to set up Analytics. What this does for you, is it allows you to track your conversion rates from specific sites. The information provided will include

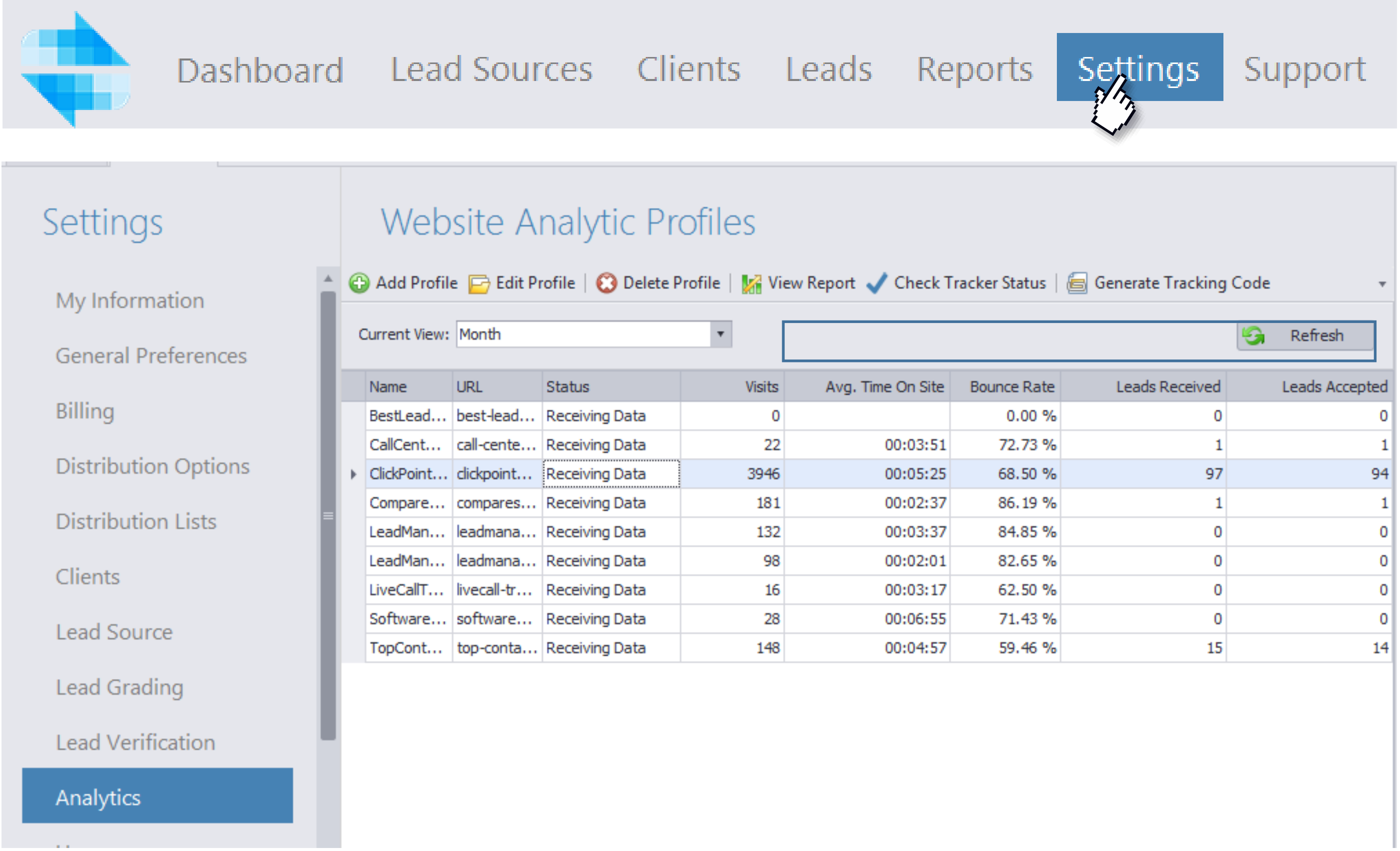
- *Visits*
- *Avg. Time on Site*
- *Bounce Rate*
- *Lead Received*
- *Leads Accepted*

→ To begin Setting up Analytics, click on the *settings* tab

→ Select *Analytics* from the left

→ Select *Add Profile.*

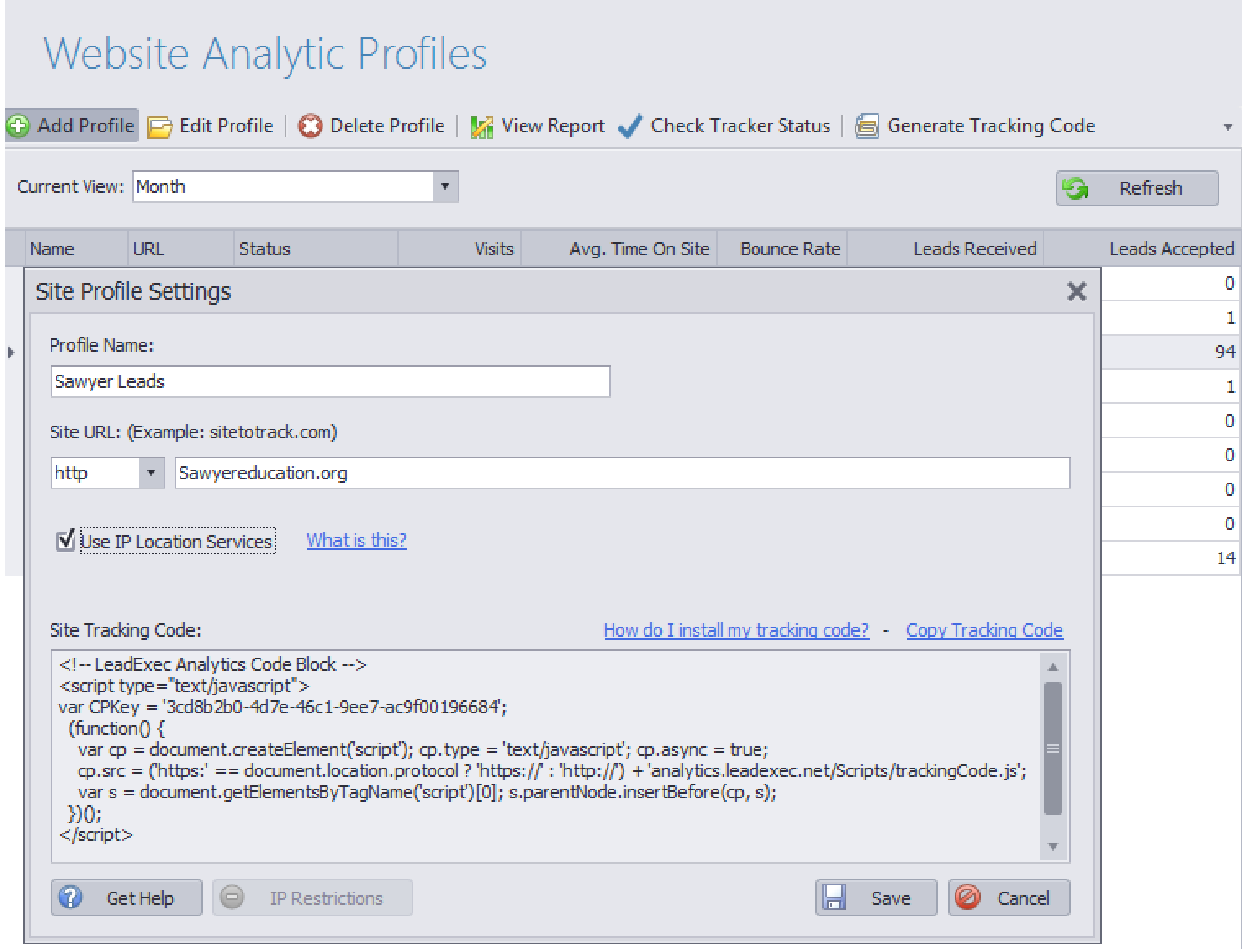
→ *Note* You can also view Analytic Reports, Check the Status of your tracking code, or generate your code for the selected profile by clicking the appropriate icon in the header row.*



Setting Up Analytics

When you add or edit a profile, the Site Profile settings will appear.

- *Profile Name* – Will describe this particular profile
- *Site URL* – Defines the site this will be tracking
- *Use IP Location Services* – This will determine a location within reason to the IP Address provided.
- *Site Tracking code –* This will be the code you place onto the form where the lead will be submitted.



Assign your profile to a Campaign

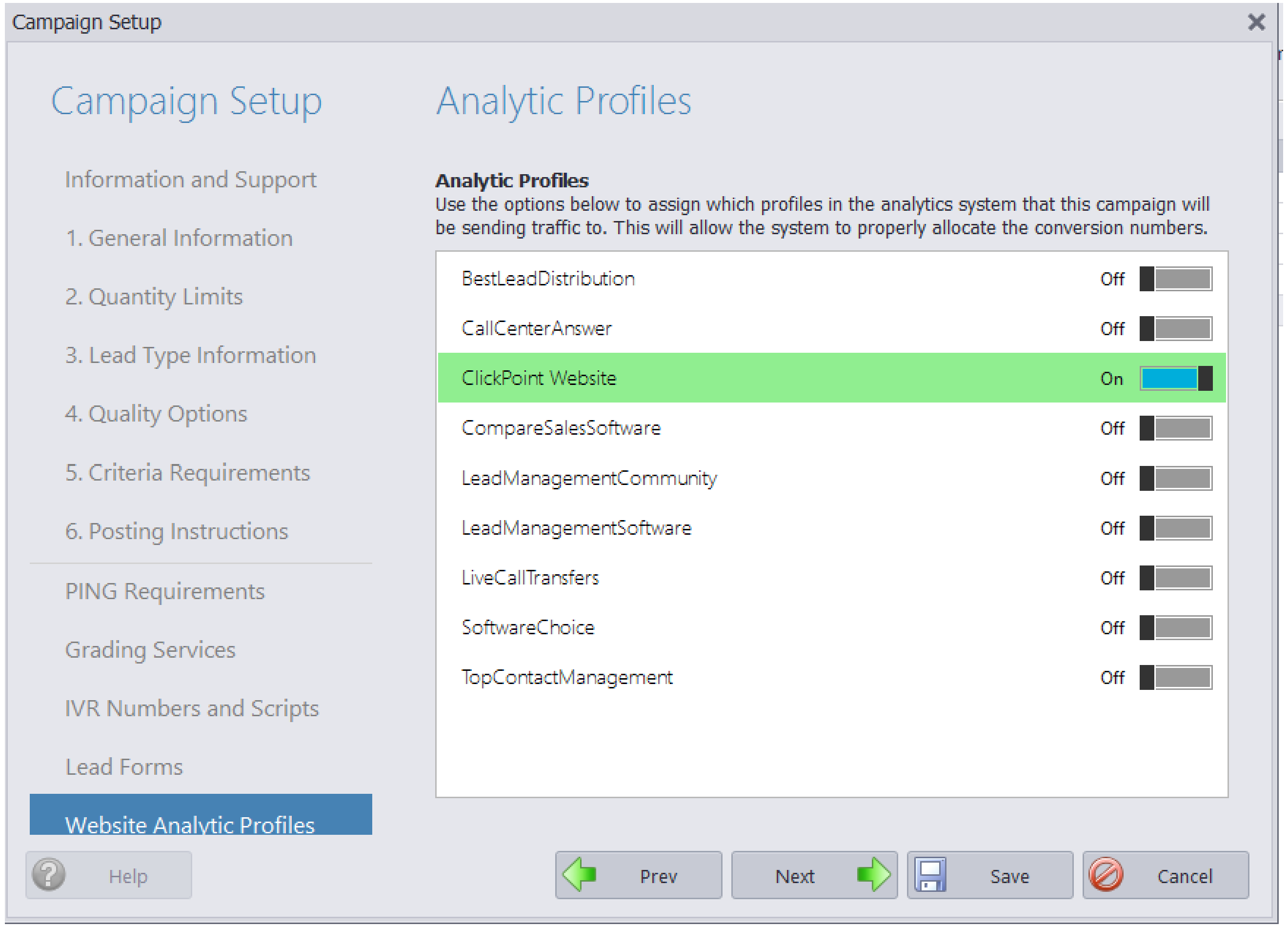
→ Next Step is to assign your profile to a campaign inside your system to track. To do this, click on *Lead sources* in the top tab.

→ Select a *Lead Source* and click *Modify Campaigns.*

→ Select a campaign and hit *edit.*

→ Select *Website Analytic Profiles*

→ Move the slider for this campaign to the analytic profile assigned to this campaign and hit *save.*



Adding your tracking code to your website

→ To add your tracking code, you are going to want to place the following line of code to the head of every page on the site to ensure optimal tracking.

```
<!-- LeadExec Analytics Code Block -->
<script type="text/javascript">
var CPKey = 'fd3344fd-1938-4eb9-84ad-825975764e5c';
  (function() {
    var cp = document.createElement('script'); cp.type = 'text/javascript'; cp.async = true;
    cp.src = ('https:' == document.location.protocol ? 'https://' : 'http://') +
'analytics.leadexec.net/Scripts/trackingCode.js';
    var s = document.getElementsByTagName('script')[0]; s.parentNode.insertBefore(cp, s);
  })();
</script>
<!-- End Code Block -->
```

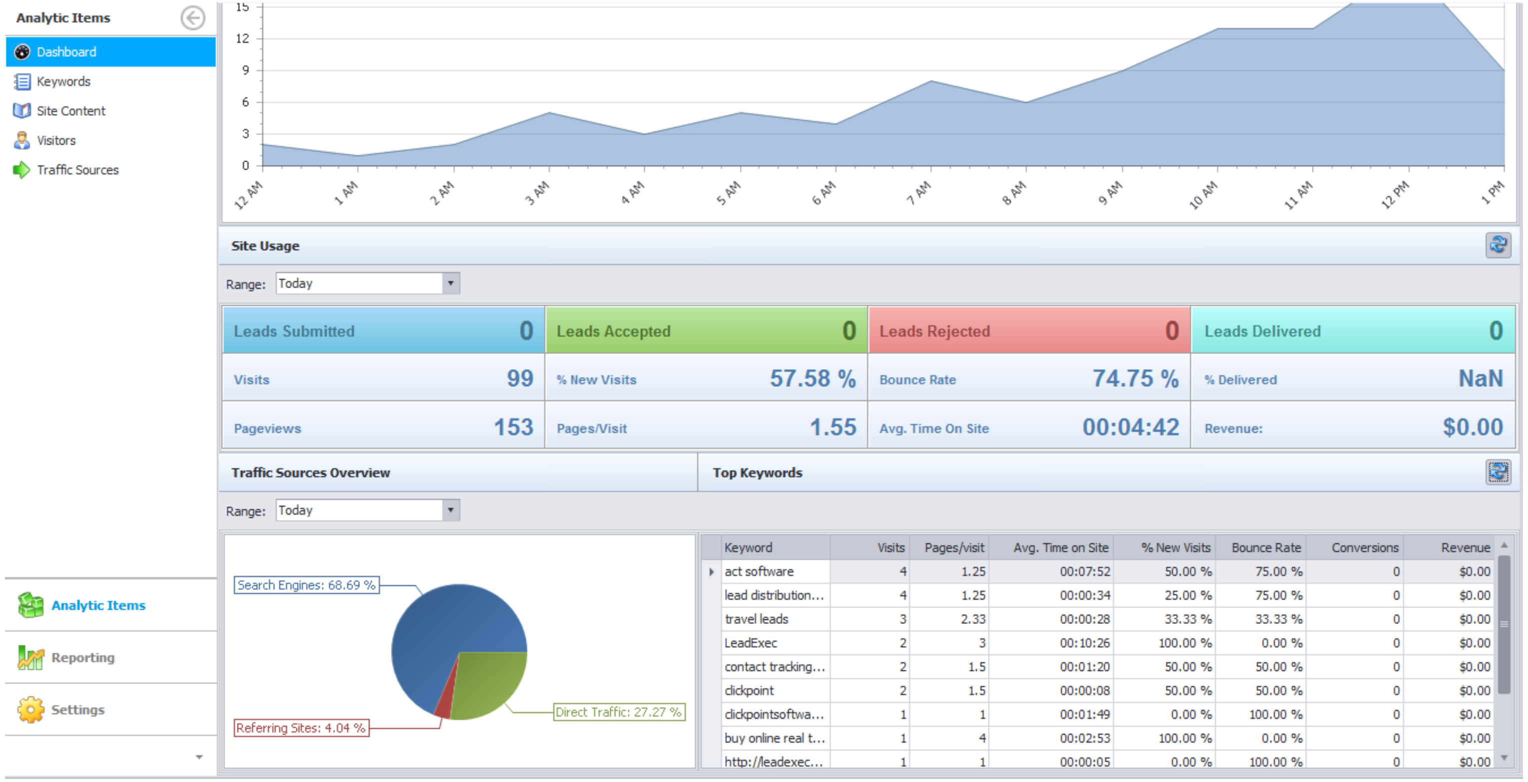
Viewing Analytic Reports

From the Main Analytic page, you can click on *view reports* to be taken to your Analytics report. This will break down:

- *Leads Submitted*
- *Leads Accepted*
- *Leads Rejected*
- *Leads Delivered*

You can further break down your report by

- *Keywords* – shows you exactly what was entered into the search engine
- *Site Content* – see where the lead entered and exited from, as well as what pages were viewed
- *Visitors* – see what browser and operating system your visitors used when viewing your website.
- *Traffic Sources* – view what source and keyword was used to direct the traffic



F.A.Q.

- Q. I have no analytic data being populated
  - A. If no analytic data is being populated, be sure to check that you are sending in the IP address of the lead into the system.
- Q. I am passing an IP Address, but no analytic data is appearing
  - A. Ensure that the field is tied to the correct system field, to do this:
    - Click Settings
    - LeadTypes
    - Modify Lead Type
    - Modify IP Address Field
    - Ensure system field is set to IP. Address
- Q. No keywords are displaying for my CPC campaigns
  - A. At this time, CPC analytics are not supported.
- Q. How do I Add My Analytics code without a developer?
  - A. Unfortunately a developer is needed to add the code to your website because it has to be added to the top of every page.
- Q. Can I add more than one profile to a campaign?
  - A. Yes, you can add more than one profile to a campaign by managing the Analytic profile sections in each campaign.