Automated Triggers

Automated triggers allow you to initiate activities in ClickPoint for sales users. As an example when a lead changes status you might want to trigger an appointment, an email, or move the lead to another salesperson. Automated triggers are a big part of sales automation that improves sales efficiencies.

Multiple Lead Types

Lead Types contain Lead Fields which are the pieces of information you gather from your Lead Sources, whether this is from a website, a paid Lead Source, or by importing acquired Leads from an Excel file. You can create multiple Lead Types within ClickPoint Lead Manager that contain different sales workflows, lead fields, and user groups.

Corporate, Branch, User Segmentation

ClickPoint Lead Manager allows for segmentation between corporate administrators, branch locations, territory managers, and users. The hierarchy allows the system to work for various business models and is easily configured to adjust the hierarchy based on your given model.

Connection Restrictions

Connection Restrictions allow for additional layers of security. The feature allows your company to whitelist or blacklist specific IP Addresses. This feature allows you to restrict user access outside of a specific IP Address.

System Settings

System Settings allow administrators to apply override settings that are applied account wide. The features include specific email address identification, the ability for users to access leads that are not specifically assigned and to allow SIP phone integration.

Sales Workflow

ClickPoint allows you to segment your leads into subcategories within the Lead Type; essentially where the Lead resides in the sales cycle (Leads, Client, Sold, Dead, etc.). Each sales workflow contains Status, Actions, and automated and manual lead routing to move leads forwards or backward, through the sales process.

Automated Events

An Automated Event allows you to create special events which trigger based on a Lead Type, Action and Status of a Lead. This feature provides the possibility for additional types of email nurture for your leads.

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Document Management

Document Management allows administrators to import documents that can be used by all system users or to restricted users within ClickPoint. You can import a sales brochure as an example, that is available to a certain team.

Transfer Leads

Administrators can transfer leads from a branch to another branch, user to another user, or from a territory manager. Administrators can manually move and transfer leads instantly.

User Notifications

Administrators can set notifications for the entire team of users or a branch location. Notifications include new lead notifications, email opened, rejected leads, and more. Notifications are initiated by pop-up modal, email, or from a notification panel within ClickPoint.

DNC Compliance

Administrators can create access for a DNC portal as well as types of acceptable DNC types. Available DNC types include: Do Not Mail, Do Not Phone, Do Note Email, Do Not Knock. When a user is added to the DNC for Do Not Phone or Do Not Email, they are restricted from being called or emailed from within ClickPoint Lead Manager. ClickPoint also provides the ability to request DNC updates via the REST API.

User Roles

Administrators can create various roles for users and administrators that include permission levels. As an example, you might have a manager that should have access to a branch but not all branches. With user roles, you can create a branch manager role, which would assign permissions to this specific type of user.

User & Lead Permissions

For each type of role various permissions are available to be implemented. You can set permissions for every administrator function as well as lead fields. Lead fields can be viewable, non-viewable, and non-editable.

Customize User Views

Administrators have the ability to customize the lead field order and view for users. ClickPoint Lead Manager features a drag and drop designer that allows for grouping, ordering, and to easily make changes to the layout that is visible to users.

Manage Users

ClickPoint Lead Manager provides administrators with the ability to enable and disable users with the click of a button. ClickPoint bills for active users and this feature allows administrators to search for users and quickly enable or disable them. Administrators can also import bulk lists of users and export the entire user list.

Sales Script

The Sales Script is used on the lead pull page. The sales script is dynamic meaning that an administrator can create a decision tree which will load customized script language when various keys are selected. You can also inject text into various parts of the script based on lead field information.

Lead Import / Export

Administrators can import lead lists into ClickPoint and then transfer the leads to various branches or users. Administrators can also export entire lead lists from different lead types and workflows.

Configure Products

Administrators can add and edit products to be used by all users of the system. Administrators can add product price, discounts, SKU #'s, sale price, statuses, and description of products.

Configure Pipeline

Administrators and users can edit the pipeline with the expected close date and probability of closing percentage. Administrators can also add products associated with the pipeline.

Push Distribution

Push Distributions optimize lead delivery by delivering leads to users and allowing the user to attempt to contact each lead. Push improves the volume of leads a user can contact efficiently, making it possible to add appointments, notes, and disposition the lead to mark the accurate placement of the lead in the Sales Workflow. Push strategies include criteria based routing, round robin, and shotgun. Criteria for delivery is specific to the lead type and can include lead fields like: state, country, loan type, quote type, product type, and more.

State Calling Hours

State calling hours are critical functionality to ensure that your sales teams do not call into states after late night calling restrictions. ClickPoint will help enable state hours to ensure your team is compliant per the terms of the FCC.

Pull Distribution

A customizable Lead distribution with the ability to set Criteria (rules) for Users to Pull Leads from a queue of leads in any sales workflow or bucket. From the administration screen, you can set callable state hours, DNC options, and lead calling rules. The user are provided with a simplified Pull Screen that integrates with Nextiva or other phone providers to initiate a call when a salesperson requests a lead. The Pull solution enables more efficient dialing of leads for large sales teams by removing the need for salespeople to attempt to contact leads manually. The Pull solution also ensures each lead will be contacted the optimal amount of times before moving the lead to an email nurture campaign.

Lead Release Timer

A release timer is a feature that works with Pull and Push to essentially release ownership of a lead from a user back to either a calling queue or redistribution. If a user is not effective in moving the lead to a critical sales step the release of the lead gives another user a shot at converting the lead.

Lead Criteria

Lead criteria is used for Lead Sources and Distribution. When purchasing leads from third party providers it is vital that they send leads that follow your desired format and requirements. If you request leads in a particular State you would not want to accept leads outside of that criteria, lead criteria prevents this from happening.

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Lead Manager Screen

The LMS or Lead Manager Screen allows users and administrators to sort their leads by workflow, filters, and date range. The LMS is a screen that also allows you to add leads, import leads, export leads, select multiple leads and update status, notes, power dial, bulk email, transfer leads, and quick edit multiple leads.

Calendar

The shared Calendar will allow users to set appointments for themselves and invite other shared Calendar users. The Calendar will allow users to set repeat or all day appointments and preview daily, weekly, and monthly appointments.

Contacts

Contacts are the stage before leads. You acquire contacts, but they might not be ready to be targeted as a lead. You can sync an import of contacts from email providers like Outlook, Yahoo, Gmail, or import your contacts. The Contacts section will allow you to turn Contacts into Leads and also create relationships between Contacts.

LMS Filters (Lead Manager Screen)

LMS Filters are dynamic and created based on the collection of lead fields contained in the lead type you have selected to apply filters. You can set filters for things like State, country, user, time zone, product type, loan type, and more. You can also create preset filters so that you can come back and use the same filter again if it is one that you use often.

Products

Products are designed to allow users to add products to a sale and to select a product from a product list. Products can contain SKU, sale price, cost, images, and description to match a specific company product.

Lead Add

In addition to capturing leads from your website, lead providers, and import users and administrators can also manually add leads.

Lead Notes

Lead Notes are useful in several areas of the lead management solution. Easily create lead notes from the LMS (Lead Manager Screen), Pull Screen, or on the Lead Details page. It is often more convenient to set notes from the LMS screen.

Lead Quick Edit

Quick Edit allows you to update more than one lead at a time with basic lead fields. You can select multiple leads, and when you are done updating one, it will prompt you to update the next lead in the selection sequence.

Lead Returns

Lead Returns are a big part of the value that a lead management system provides. Users can mark a lead as returnable so that administrators can give the lead back to a third party lead source. Users can easily return lead in the ClickPoint solution.

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Edit Lead Pipeline

Users can update any leads pipeline by selecting the edit pipeline button. The edit pipeline will allow a user to apply an expected close data and probability to close, as well as associate any products to the sale.

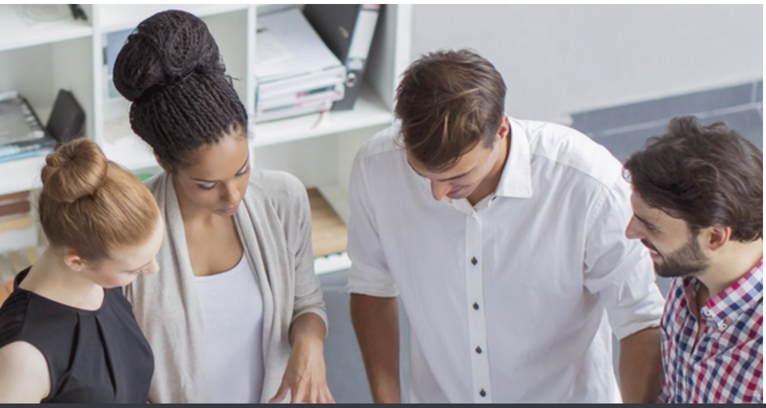
Add Documents

In addition to selecting documents to apply to a lead from the document library, users can import documents and store them which will associate them with a particular lead.

Email Features

Email Templates

ClickPoint Lead Manager provides users and administrators with an email template library. You can utilize email templates that are provided by ClickPoint, create your HTML email templates, or plain text emails. With the email template system, you can create groups and contain several email templates within a group listing. You can use tags in email templates which will inject lead data into the email template when it sent. ClickPoint uses SendGrid to ensure emails deliver with the highest delivery rate possible. Email is delivered on behalf of users so that email responses from potential pros-pects will route back to their company email.



Email Nurture

Email Nurture allows administrators and users to add leads to nurture campaigns. Nurture campaigns can initiate a series of emails to be delivered based off of a certain status, an opened email, or a new lead being accepted into the system.

Email Notifications

Email Notifications can be configured to be released when a new lead is delivered to the system or when a particular email is opened by a prospect or lead.

Triggered Email

Triggered Email is a feature that allows administrators to determine email templates that should be delivered when certain lead statuses are changed in the system. As an example you may have an email that goes out every time a user initiates an appointment with a lead.

Phone Features

Call Monitor – Inbound

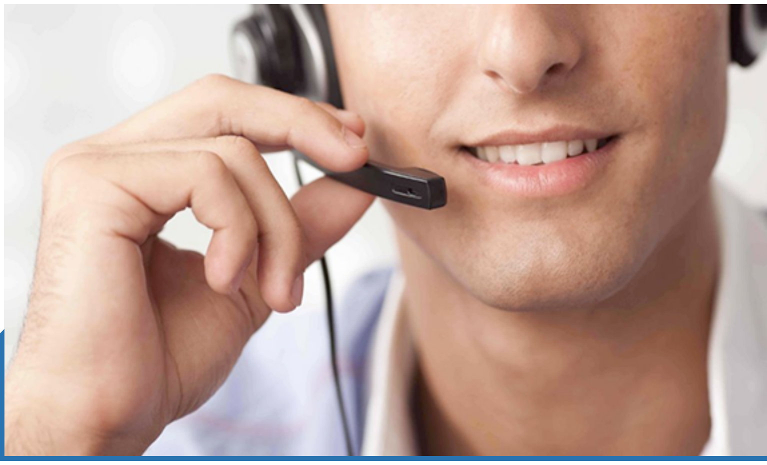
Inbound call pops are very popular with sales teams that utilize offline and digital marketing. When a person calls a specified phone number the ClickPoint solution will route the call to the best user and also force a screen pop if the user accepts the call. For this feature to work clients must use the Nextiva integration.

Click-To-Dial – Outbound

ClickPoint works with any VoIP provider that utilizes VoIP to place outbound calls for Click-To-Dial or Power Dialing.

Power Dialer – Outbound

The ClickPoint Power Dialer initiates a call in a sequence and only when a user specifies and requests and outbound dial. This feature works with TCPA compliance rules to ensure users are dictating call requests and not automated by the system.



Reports

Customized Reporting Dashboard

The ClickPoint dashboard allows administrators or users to create dashboard reports based off any time range, criteria, and specified tile size. Once you have created a reporting tile, you can share the layout with anyone in the company that has an active license. here are many pre-built tiles to choose from that can be edited to meet your needs.

Out of the Box Reports

There are many out of the box reports that help administrators understand how lead sources or salespeople are performing.

Customized Scoreboard Reports

Scoreboard Reports are designed to be visual aids that help prioritize the metrics you would like your sales team to improve. You can customize these reports to cycle through slides, change the background image or video, and change the metrics.

Report Goals & Filters

Report Goals allow you to set either green or red markers on specific reports to indicate if your team is meeting company targets or goals.

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REST API

ClickPoint features a self-documenting REST API found here: REST API. REST stands for Representational State Transfer (sometimes spelled "ReST"). It relies on a stateless, client-server, cacheable communications protocol and in virtually all cases, the HTTP protocol is used. REST is an architecture style for designing networked applications.

Digital Lead Sources

Digital Lead Sources are generally third-party lead providers, websites, and landing pages. With ClickPoint we have over 50 pre-built integrations with top-tier lead providers. We also include dynamic integration documentation so that you can create an integration with any new lead source or provider.

Encompass

Encompass is the number one Loan Origination platform in the mortgage market. The Encompass integration allows Encompass users to search for leads in the ClickPoint solution and to sync lead data into Encompass, bypassing any manual entry.

RingCentral

Connect with Ring Central softphone, enabling you to make click-to-dial operations from your ClickPoint account.

Direct Mail Sources

ClickPoint Lead Manager has a direct mail holding bin which allows administrators to import direct mail files with a promo code. When a prospect calls into the 800 number provided and is routed to a user, the user can search via the promo code which will then pull the lead data from the holding bin and assign it to the user.

SoftVu

SoftVu is a full-service email marketing solution that is designed for the mortgage market. ClickPoint is fully integrated and can send lead data to SoftVu when certain status changes occur. As an example when a new lead becomes an application, ClickPoint Lead Manager can send the lead data to SoftVu and let SoftVu manage the email communication for the remainder of the loan process.

nextiva

Nextiva is a Cloud Communication and business phone service provider. ClickPoint Lead Manager is fully integrated so that both outbound and inbound calls are tracked and services like click-to-dial, power dial, are available.

FullContact

The FullContact integration helps you turn partial contact information into full contact data from social media sources.

SMTP

MTP Server integration allows email sent from ClickPoint Lead Manager to use a custom SMTP server. This feature is not compatible with Office365.

cheetahmail

The CheetahMail integration allows you to trigger event-based email and list subscriptions from activities in ClickPoint.

Experian

The Experian CCMP integration allows you to trigger event-based email and list subscriptions from activities in ClickPoint.

CISCO

Cisco WebDialer from Cisco Systems is a click-to-dial application for Cisco CallManager that enables users to easily place calls instantly from ClickPoint.

Zillow

Zillow is third party lead provider that requires authentication in order to receive leads into ClickPoint. ClickPoint Lead Manager features an easy integration portal to update your credentials to easily receive Zillow leads.

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