

## Creating/Editing an Affiliate in iLead Machine:

1. Click Users.
2. Click Affiliates.
3. Click Manage Affiliates.
4. Click Add Affiliate or click Affiliate to Edit.
5. Fill in the screen per the example:

All gray fields need to be filled in. If you do not have the information you can put a . in the field.

### CRITICAL FIELDS:

- **Email:** The email address **MUST** match the email address of the user in the CRM in order for the survey to be pushed to the CRM.
- **Need a lead price.**
- **Send Sugar CRM: MUST be true** (I know the example shows false).
- **Select Type:** Pay Monthly works best

### AFFILIATE NEEDS A FILTER TO RECEIVE THE LEAD IN THE CRM.

#### Click Filter (last item on affiliate form)

1. Click Add
2. Need to create a filter such as below.
3. Make sure you click Filter is Activated
4. Click Save.

Edit Filter

	NOT	(	Criteria	)	And/Or
Insert Delete	<input type="checkbox"/>	▼	Lead Category = Alpha Eval Cisco	▼	OR ▼
Insert Delete	<input type="checkbox"/>	▼	Lead Category = Mergilent	▼	OR ▼
Insert Delete	<input type="checkbox"/>	▼	Lead Category = India Evaluation	▼	▼
Add			Filter is Activated		Save

### Edit Affiliate

Affiliate Id	3395
First Name	Holly
Last Name	Somers
Company Name	Promero
Address 1	.
Address 2	.
City	.
State	.
Zip	.
Phone	.
Fax	.
Email	hsomers@promero.com
Alternate Email	
User Name	admin
Password	
Password Hint	1234
Leads	0
Email	...
Affiliate Schedule Lead Allotment	1
Lead Threshold	1
Max Leads	Unlimited ▼
Lead Price	1
Lead Transfer	Non-Hot Transfer ▼
Exclusive Leads	False ▼
Send Lead Info	False ▼
Send Lead Link	False ▼
Send Lead Attachment	False ▼
Send Leads 360 Post	False ▼
Send Sugar CRM	False ▼
Select Status	Active ▼
Affiliate Group	▼
Account Manager(s)	
Select Type	Pay Monthly ▼
Licensing	...
Flights	...
Filter	...
Cancel	Save

**Need to Create Return Reasons (why a lead may be returned)**

1. Click Leads
2. Click Return Reasons
3. Click Add Reason
4. **Optional:** Reason Type – Can make a Comment Required so the affiliate will have to enter a reason by the Customer was not happy
5. Click Save

**Edit Return Reason**

Reason Id	<New>
Reason Name	Customer Not Happy
Reason Type	Comment Required
Comments	<div style="border: 1px solid gray; height: 50px;"></div>
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

**Need to create a lead type in the iLead in order for affiliate to get leads and create the filter.**

1. Click Leads
2. Click Lead Types
3. Click Add Type
4. Create a new lead.  
**NOTE:** The Return Reason should be populated with what the return reason created above
5. Click Save

**Edit Lead Type**

Type Id	<New>
Type Name	CRM
Lead Disposition(s)	<div style="border: 1px solid gray; height: 40px;"></div>
Return Reason(s)	Customer Not Satisfied
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

you