

## Process for Deleting Available and/or Used Leads in iLead when they have been assigned to an Affiliate:

**NOTE:** If a lead has been assigned as a bonus, it cannot be returned; thus it cannot be deleted from the system. Contact [Support@promero.com](mailto:Support@promero.com) for deletion of this lead.

### 1. Need to Create a Return Reason in the iLead

1. Login to their iLead Machine
2. Click Leads
3. Select Return Reason
4. Click Add Reason
5. Enter a Return Reason
6. Select Reason Type from drop down. Choices are: **Standard or Comment Required.** If you want a reason why the lead was returned, select Comment required.
7. Click Save

**Edit Return Reason**

Reason Id	<New>
Reason Name	Cost
Reason Type	Comment Required
Comments	<div style="border: 1px solid gray; height: 50px;"></div>
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

### 2. Need to Associate lead types with Return Reasons

1. Click Leads
2. Click Manage Return Leads
3. Select Return Reason from Return Reason drop down.
4. Click Submit.

**Edit Returned Leads**

Lead Id	231411
Affiliate Name	Somers, Holly
Return Reason	Customer Unhappy
Return Status	Approved
Reset bid count	<input type="checkbox"/>
Return Comment	carpet still dirty
Response Comment	<div style="border: 1px solid gray; height: 50px;"></div>
Lead Details	Lead Has been Deleted
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

**3. Check to Verify if the Lead has been assigned to an Affiliate**

1. **Login to their iLead Machine** (can access from Promero's site)
2. Click **Leads**
3. **Edit the Lead** you want to delete
4. **Scroll to middle of screen** to identify if this lead has been assigned to an affiliate. If no name appears, then it has not been assigned yet.
5. If it has not been assigned, scroll down and click **Delete**.
6. A screen will display asking if you are sure to delete, click **Delete**.

Lead has **NOT** been assigned

Affiliate Id	First Name	Last Name	Company																												
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Proof</td> <td colspan="3">Yes</td> </tr> <tr> <td>Total Bids</td> <td colspan="3">1</td> </tr> <tr> <td>Lead Type</td> <td colspan="3">Alarm</td> </tr> <tr> <td>Lead Category</td> <td colspan="3">crm</td> </tr> <tr> <td>Increase Day Exclusive</td> <td><input type="text"/></td> <td>Increase Day Non Exclusive</td> <td><input type="text"/></td> </tr> <tr> <td>Expire Day Exclusive</td> <td><input type="text"/></td> <td>Expire Day Non Exclusive</td> <td><input type="text"/></td> </tr> <tr> <td>Increase Amount Exclusive</td> <td><input type="text"/></td> <td>Increase Amount Non Exclusive</td> <td><input type="text"/></td> </tr> </table>				Proof	Yes			Total Bids	1			Lead Type	Alarm			Lead Category	crm			Increase Day Exclusive	<input type="text"/>	Increase Day Non Exclusive	<input type="text"/>	Expire Day Exclusive	<input type="text"/>	Expire Day Non Exclusive	<input type="text"/>	Increase Amount Exclusive	<input type="text"/>	Increase Amount Non Exclusive	<input type="text"/>
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<input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Delete"/>																															

**4. If the Lead has been Assigned, you need to associate that lead to the return reason:**

1. Log into the iLead Portal using Customer's company name
2. Enter URL for Company iLead, replace Admin with portal  
**Example:** <http://cipha.ileadmachine.promero.com/portal/>
3. **Login as the affiliate that leads are assigned to.**  
 You may have to get access from the Company.
4. **Select the Lead ID** you want to delete.
5. Click **View Details**
6. Scroll to bottom of the View Details screen
7. Select the **Return Reason** from the drop-down menu.
8. Click **Submit**.

Select Return Reason. You should have identified this Return Reason in above Step A

**Return Request**

Return Reason: crmtest

Return Comment:

**Click Submit**

**5. Once you have associated the lead to a return reason, you need to approve the lead**

1. Log into their iLead machine (get out of the portal)
2. Click **Leads**
3. Select **Manage Return Leads**
4. **Select the Lead ID to edit.**
5. **Select Approve** in the Return Status Drop Down.
6. Click **Submit**

Edit Returned Leads

Lead Id	218663
Affiliate Name	Claxton, Shelley
Return Reason	crmtest
Return Status	Approved
Reset bid count	<input type="checkbox"/>
Return Comment	<div style="border: 1px solid #ccc; height: 20px;"></div>
Response Comment	<div style="border: 1px solid #ccc; height: 20px;"></div>
Lead Details	<a href="#">View Lead Details</a>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

Select Approved

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**5. Once the lead has been approved, you can delete it.**

1. Log into their iLead Machine
2. Click **Leads**
3. Click **Manage Available leads or Used Leads**
4. **Edit the lead** to delete
5. Scroll to bottom of page and **Select Delete.**
6. Select **Delete** when prompted "Are you sure you want to delete the selected lead".

Affiliate Id	First Name	Last Name	Company
Proof	Yes		
Total Bids	1		
Lead Type	Alarm		
Lead Category	crm		
Increase Day Exclusive	<input type="text"/>	Increase Day Non Exclusive	<input type="text"/>
Expire Day Exclusive	<input type="text"/>	Expire Day Non Exclusive	<input type="text"/>
Increase Amount Exclusive	<input type="text"/>	Increase Amount Non Exclusive	<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Delete"/> ←			