The birth of the iLeadMachine software evolved around the need to configure multiple companies (with ability to add child companies).

**A company needs to have way to:**

- Create users
- Create surveys
- Crate leads
- Create reports

**NEED TO DO TO CREATE/SUBMIT SURVEY**:

1. Create affiliate in iLead
2. Create filter (i.e. by lead category)
3. Create survey
    - Add questions
    - Add answers
    - Link questions to answers

    **NOTE**: In order for iLead to push the survey to CRM, you must:

    Create on survey: **amount, opportunity type, and opportunity name – Make these hidden fields**.

4. Submit Survey
5. Go to CRM
    - Leads
    - Available Leads
    - Refresh screen
    - Used Leads
    - Refresh
    - You should see the lead in your Used Leads (this means the lead has been assigned)

**Users:**

1. **Administrator** – have all permissions (keys to the kingdom) for their company.

2. **Affiliate** – Receive leads.

3. **Publishers** – The referring source of the lead (person or company; i.e.; Google, Yahoo, Agent, Email. The publisher then takes the lead and publishes it.

    **Note**: Can track the publisher via the URL

4. **Account Managers** – See own accounts; limited access. They get copied on all leads received.

5. **Advertiser** – Give the publisher the lead; they have something to advertise.

## Manage/Create Affiliates Fields:

**Note:** A Consumer fills out the forms (surveys)

- ✓ **Affiliate ID –** Created by the system.
- ✓ **First and Last name –** Name of affiliate (these are 2 separate fields to enter)
- ✓ **Company Name –** Name of the affiliate's company.
- ✓ **Address** – Address of company (includes street, city, state and zip – total of 5 separate fields)
- ✓ **Phone** – Phone number of the affiliate.
- ✓ **Fax** – Fax number of affiliate.
- ✓ **Email address** – crucial field
- ✓ **Alternate email address** – only used for informational reasons

## Manage/Create Affiliates Fields (Continued):

- ✓ **User Name** – The name the affiliate uses to log into the system.
- ✓ **Password** – The password the affiliate uses to log into the system.
- ✓ **Leads** – Actual purchase of leads for an affiliate
- ✓ **Affiliate Schedule** – Sets a schedule when affiliate can receive leads.
- ✓ **Lead Allotment** – Normal number of leads that an affiliate purchases on a regular basis.
- ✓ **Lead Threshold** – When affiliate is running out of leads, this is set to alert the affiliate that he is running out of leads and needs to purchase more.
- ✓ **Max Leads** – The maximum number of leads an affiliate can receive.
- ✓ **Lead Price** – How much the affiliate pays per lead.
- ✓ **Lead Transfer** – "Hot Transfer" – Ability o receive direct phone calls.
- ✓ **Exclusive Leads** – Affiliate pays extra for exclusive leads (he only receives these leads)
- ✓ **Send Lead Info** – Send via email.
- ✓ **Send Lead Link** – Similar to email, except the lead also displays all information regarding that lead. Sends affiliate an email instructing him to log into his email to receive a new lead.

- ✓ **Send Lead Attachment** – Affiliate gets email with attachment showing lead (usually in an Excel spreadsheet).

- ✓ **Send Leads 360 Post** – Puts the lead directly into their 360 system. (Another CRM system)

- ✓ **Send Sugar CRM** – Puts into SugarCRM (our system).

- ✓ **Select Status**

  - **Active** – Affiliate is active and able to receive leads & review old leads
  - **Suspended** – We turned them off from receiving new leads, but they can see their old leads.
  - **Terminated** – We stopped doing business with them.
  - **Prospect** – Will not get leads, but can log in; usually for new clients that just signed up with us.

- ✓ **Affiliate Group** – The affiliate is a member of an affiliate group. By identifying this field, Affiliates within the same group will not receive the same lead.

- ✓ **Account Managers** – Who the affiliate reports to

- ✓ **Select Type** – How an affiliate pays for leads:

  - **Pay In Advance** – Renew Allotment – Buys a block of leads, when he runs out; he purchases another block of leads.
  - **Pay Monthly** – Pay for total amount of leads on a monthly basis. He gets unlimited leads and pays after the fact; i.e.; the 1st of each moth.
  - **Pay as you go** – Affiliate pucks and chooses at available leads (this is the least common)
  - **Pay In Advance – Individual Purchase** – Affiliate pays for individual purchases. Buys leads for certain amount and then chooses leads. (Not very common.)
  - **Pay As You Go** – Storefront – Buys leads via a storefront – bought leads individually.
  - **Internal Affiliate** – Affiliate receives leads from own company.

- ✓ **Licensing** – Do not discuss. Per Howard specify this is a future release – Contains licensing information for this affiliate that pertains to license rules within his state.

- ✓ **Flights** – Do not discuss. Per Howard specify this is a future release. Not used anymore, but was related to commercial advertisements; i.e. BMR used it.

- ✓ **Filters** – Means to identify special constraints for a lead to go to an affiliate.

## Life Cycle of a Lead:

A lead can be sold 3 times.

When a survey is filled out; it becomes a lead. It then goes to the assignment process. It looks at:

1. Who do I go to first?
2. It looks at the internal affiliates, if there is no “Hot Transfer” (&btransfer=1 is in the URL),
3. It checks for exclusive leads,
4. If no exclusive leads,
5. It then looks for everyone else; i.e.; active, allotment greater than 0, pay monthly,
6. It then checks for filter to identify any filters that matches an affiliate leads. It then returns a list of affiliates,
7. It then ranks who has gone the longest without a lead.
8. If this particular lead could be sold times, but one affiliate meets the criteria, they get the lead.
9. If the affiliate does not meet the criteria, it goes to an affiliate portal (web site) for those affiliates who buy leads one at a time.
10. The lead stops at the affiliate portal.

### How the Storefront came about:

If the lead stops at the affiliate portal and no other affiliate bought the lead, we could lose money.

Thus the storefront was built which contains a history of extra leads that were not purchased in order to recover lost revenue.

**<u>Filters: </u>(look at my filter created under Demo Company & Training affiliate)**

**Mortgage Filter: Example Filter below:**

**USING AND:**

**Create Filter** looking for lead on refinance for Florida, Georgia and Alabama, with house value of over 100,000 and current interest is greater than 7%:

State: Select Florida, Georgia, Alabama
AND
Home Value = > enter 100000 (use no commas)
AND
Current Interest = > enter 7 (do not type %)
AND
Select Loan Purpose
= Refinance

**NOTE**: Need to add parenthesis around above formula (around state, value, interest, refinance)

**Using OR across surveys:**

Inbound
Budget > 100000
OR
Outbound
List > 250000

If you filter on zip codes that you enter, you need single quotes around each zip code.

**Using Like in Filters:**

Phone number
Like
954*
OR
Phone Number
Like
754*

Note: Need to add * at end of number (* used for wild card)

## Definition of lead types

- A **lead type** is other things generic to a lead; includes return reasons, lead disposition, promotions etc.

- **Lead Category** – price of a lead.

- **Lead Disposition** – library of dispositions (closed, pending etc.)

- **Return Reasons** – why an affiliate would want to return a lead; i.e. incorrect phone number, not qualified for coverage.

- **Promotion** – Leads that are given to the public; i.e., we advertise buy 100 leads and we will give you 50 leads credit (this is only for storefronts).

    - ✓ A lead ends up on a storefront (public web) if there is no matching criteria as to who to send it to.

## Steps to Consider when building a survey:

- Know in advance what you want the survey to look like and types of questions/answers.

- The types of questions; i.e., multiple choice, drop down, text, text area, etc.

- Create Answers first (can use answers for multiple questions).

- Create questions.

## Answer Types:

- **Standard** – 99% of survey are standard
- **Calculated** – receive another drop down to set up a formula
    - ✓ Hidden questions are usually calculated

- **Invalid** – checks to ensure answer is valid; i.e., state. Used often as a Please Select question, if they do not select anything, the answer would be Invalid.

## ILead Survey:

**Disclaimer** – Company disclaimer – displays at bottom of page.

**Survey Heading** – top of page

**Total Bids** – how many times can this survey be distributed; internal use is usually 1 day.

**Lead Staleness** – how many days old can a lead be and still be sent to an affiliate = 1 day is normal.

**DID** - Do not use

**Emails** – can send email

**Survey Lead Assign** – Affiliate gets notified he has been assigned a lead.

**Auto Assign Hot Transfer** – lead is auto assigned and affiliate gets a call.

**Send to PCRM** – push survey (lead) to CRM.

**Allow call backs** – Predictive dialer does not allow callbacks, but this updates predictive dialer to do a call back.

**Auto Proof** – If you did not auto proffer leads, could not get leads. Administrator checks them to ensure the lead is valid.

**Survey Destination** – where a lead is sent.

**Display Rank Numbers** – adds number to survey list of questions.

**Enable Dialer -**

**Upload Header** – cannot remove, must upload another header.

**Upload Footer** – uploads footer

**Upload Redirect Page** – what customer sees on web after submitting a survey; i.e., thank you for submitting your survey.

**Managed Flights** – do not use. It was intended for managing commercials; sell a spot usually for a 2 week timeframe. There was no guarantee affiliate would get any leads.

**Order Form Settings** – Do not Use.

Lead Assign – Do not Use.

## Question Types:

**Checkbox** – which of the following services, then list them, check multiple choice

**File** – Does not work yet – upload files, or attach a file

**Hidden** – do not show

**Label** – question with no answers; i.e., to make survey look nicer.  For example may want a label for section of questions/answers, extra text page.

**Password** – text field.  S you long in, shows **** for password.

**Ratio**- yes/no (better for yes/no or any select question because user cannot check multiple items.

**Select** – 1) Can be a Drop down single select or 2) look at attributes equal multi-select, can select multiple choice.

**Text** – Enter text

**Test Area** - big block of text

Based on type of question element, the attributes give you different choices:

- Test Area – can change text size
- Test field – can shrink text.
- Can have required fields

- Validation – phone number, will give message a phone number must be valid number.

**Why do we Map Questions**:

- To tell survey what question means, i.e., question has special meaning. These questions have these special needs.

- Must select all public questions, if you don't pick any public questions, then when the leads come in, there is no information on it.

**Phone Look Up page** – is used as script in predictive dialer.  The predictive dialer passes the phone look up page number dialed.  When call is made and answered, the Agents click a button, the predictive dialer looks at the phone ID in the phone lookup page and matches it with number the predicative dialer called, it pulls up a script and pre-populates some fields in the survey for agent. If it does not match, a blank script is loaded.

**Ranking** – puts questions in order you want to see on survey.

**To make columns on a survey** – select the question to be at top of 2nd column and click column.

**Divider** – is a page divider- The label submit is changed to Next Page.

**Under Leads:**

**Contacts**

- Contact types
- Upload Contacts is not working
- Attach a question for that type of contact.

**The intent of Upload Contacts** – customers can load own contact list.  Used to pre-populate the survey form, then get screen that 1 box that has all columns of spreadsheet just loaded, then another box has all the questions you said that contact type can contain; match them up.