Lead CENTER

User Guide



LeadCENTER makes everything about your leads better: fast and cost-effective acquisition and efficient management — all in one place. This guide will get you up and running in LeadCENTER, so you can focus on helping more Americans.

Need Additional Help?

Reach out to Support@IntegrityLeadCENTER.com

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1. INTEGRITY LEAD CENTER

The Integrity Lead Center application is the single source for licensed agents to buy and maintain leads (potential insurance subscribers). The application has two types of logins:



Some screens and features are available for admin login only and these are described in more detail under a separate section.



REGISTRATION

2.1 ILC REGISTRATION STEPS

1. Log in to the specific Business Unit URL assigned by Integrity and click "Register."



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2. Fill out the required fields for registrationand click "Register."

The system sends a confirmation email.

Figure 2-2: Complete registration info





3. Open your email account, locate the email from Integrity Lead Center, and click "Confirm" to verify the email address.

NPN and email registration is complete, and a confirmation message displays.

4. Click "Back to Login."



Figure 2-5: Log in to account





Figure 2-7: Registration notice for BU Admin

- 2.1 ILC REGISTRATION STEPS CONT.
- 5. When the ILC landing screen displays, click "**Login**."
- 6. Enter the registered NPN number and password, then click "**Login**."
- 7. When a new user logs in for the first time, a message displays stating your BU admin must approve access.

8. The BU admin receives an email message and approves the registration request.



ORDER LEADS SCREEN

The ILC application provides multiple ways for agents to navigate areas and order leads through the Order Leads Screen. Use this screen to locate and buy potential customer leads.



3.1 NAVIGATING THE ORDER LEADS SCREEN

- Open the ILC application. The Order Leads Screen displays.
- Map is the default viewing mode. Names of states, cities, and streets automatically appear in Map view. Click Map > Terrain to see terrain features.
- 3. Click **Satellite** to see the map in a satellite view
- Corrected

 C
 - Figure 3 2: Order Leads Screen Satellite view





Figure 3 3: Keyboard shortcuts

4. To see names of states, cities, and streets in satellite view, click "**Satellite > Labels.**"

5. Click **Keyboard shortcuts** to help navigate the map.

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- 3.2 FINDING LEADS
- Enter the state and county name into the fields.
 OR

Click an area on the Heat Map. The location automatically appears in the state and county fields.

3.3 LEAD GROUPS

After selecting the state and county, choose from three Lead Groups:

Internet Leads, Direct Mail Leads, or Social Media Leads



🗘 Internet Leads		Avail.	Order
New Spanish Internet Lead (Beta)	()	120	
Spanish Instant Internet Lead	(217	
New Internet Life Lead	(i)	7797	
Instant Internet Lead	0	5616	
Internet Life Lead 1 Mo	()	41123	
Internet Life Lead 3 Mo	(j)	169736	

Figure 3-4: Lead Group Information

3.3.1 LEAD TYPES AND INFORMATION

Each Lead Group shows this information:

Lead Type and Information

Click the ① symbol for more information on lead type and cost.

Availability

Number leads of available for that type.

Order Quantity

Enter the desired quantity for purchase.

Note:

If the lead type Information is in Spanish, the potential customer may require an agent who speaks Spanish.

Less]Contra: Order Lods	1. Use the Heat Map to select a state and county.
Constant and the second s	2. Choose a Lead Type from the Lead Groups, check the information on the Lead Type, then enter the number of leads in the Order Quantity field for that Lead Type.
Moreard Mark Bar Control And Control	3. Click Add to cart in the upper-right corner of the Order Leads Screen.
Leads added to cart.	4. A confirmation message displays "Leads added to cart." The shopping cart icon at the top of the screen shows the number of leads in the cart.
4	5. Click the shopping cart icon to see details about items in the shopping cart
Image: second	6. Click " PROCEED TO PAYMENT " to go to the Checkout Screen.
Click " Order Leads " to add more leads from the Lead Type list. If needed, enter additional quantities for the same lead type in the Quantity box. Coupon Disc	ounts, if ar under ount." Click the trash can icon to remove items from the shopping cart. Click " Cancel Order " to cancel the order. Enter any coupon codes in the Enter Coupon Code box, then click "Apply."
Order Leads / Shopping Cart	Cancel Order
Lead Type County	State Quantity Unit Copt. Coupon Discount Total Price
New Internet Life Lead Jones	TX 4 \$9.00 (\$32.40) \$3.60 m
	Coupon Code : Erner Coupon Code
	Total Cost : \$36,00 Total Fees : \$0.11
	Coupen Discount : (\$32.40) Order Total \$3.71
	PROCEED TO PAYMENT

3.3.2 ORDERING LEADS

Figure 3-5: Shopping Cart details



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3.3.4 LEAD TYPE ALERTS

The bell icon next to each Lead Group heading enables setting up an email alert for any county.

- 1. Select a state and county in the Heat Map.
- 2. Click the bell icon to set up an alert for that county. The bell icon turns green.
- 3. The alerts arrive in email, informing agents that new leads are available for purchase in that county.

MANAGE LEADS SCREEN — AGENT VIEW

The ILC application provides multiple ways for agents to navigate areas and order leads through the Order Leads Screen. Use this screen to locate and buy potential customer leads.



Figure 4-1: Manage Leads Screen

MANAGE LEADS SCREEN - AGENT VIEW

The Manage Leads Screen allows agents to see and manage all the details of the purchased leads.

Click "**Manage Leads**" to access the Manage Leads Screen.

Lead				raja Nukala 🛃 👻				
ـــــــــــــــــــــــــــــــــــــ	Manage Leads							
ሺී Order Leads	Search by First Name, Last Name or Lead ID CREATE NEW +							
E Manage Leads Select All Filter Export Template Asign Satura List View Sort List View Sort								
🖉 Coupons	BRANDON IMHOFF R		ROBERT LEWIS	ERIC JOHANNESEN				
🐣 Manage Agents	Lead Status	Lead Status	Lead Status	Lead Status				
	L0:New	L0:New	L0:New	L0:New				
沯 Ask a Specialist	State	State	State	State				
	FL	FL	FL	FL				
	County	County	County	County				
	Polk	Polk	Duval	Duval				
	Lead Owner	Lead Owner	Lead Owner	Lead Owner				
	Eduardo Fernandez	Eduardo Fernandez	Eduardo Fernandez	Eduardo Fernandez				
	Lead Type	Lead Type	Lead Type	Lead Type				
	Mortgage Protection Call-In Silver	Mortgage Protection Call-In Silver	Mortgage Protection Call-In Silver	Mortgage Protection Call-In Silver				
	Phone	Phone	Phone	Phone				
	4078790450	8635002860	9043436757	-				
	Received Date	Received Date	Received Date	Received Date				
	4/1/2022	4/1/2022	4/1/2022	4/1/2022				

The Manage Leads Screen opens in Card View.

4.1 NAVIGATING THE MANAGE LEADS SCREEN

Agents and admins can change the Manage Leads Screen's appearance to best meet their needs. All changes are remembered, even after logging out and returning to the application.

4.1.1 CARD VIEW

Order Leau

Manage Leads

Coupons

8

The Manage Leads Screen automatically opens in Card View. The leads information displays in the form of "cards."

NOTE: Card View cannot be changed in the mobile application.



Figure 4 2: Manage Leads Screen — Card View

Figure 4 2: Manage Leads Screen — Card View

4.1.2 LIST VIEW

Click "List View" to view the leads as a list.

										₩ RAJA	NUKALA	•
*	Manage Leads											
බ් Order Leads	Search by First Name, Last Name or Lead ID Q						CREA	re new +				
욛 Manage Leads	Filter	Export		+ [Leads Assign							Card View	↓≞ Sort
🖉 Coupons		First Name	Last Name	Lead Status	State	County	Lead Owner	Lead Type	Received Date	Phone		
🐣 Manage Agents		BRANDON	IMHOFF	L0:New	FL	Polk	Eduardo Fernandez	Mortgage Protection Call- In Silver	4/1/2022	40787904	50 Q	~
谿 Ask a Specialist		WILLIAM	MONIES	L0:New	FL	Polk	Eduardo Fernandez	Mortgage Protection Call- In Silver	4/1/2022	86350028	60 Q	~
		ROBERT	LEWIS	L0:New	FL	Duval	Eduardo Fernandez	Mortgage Protection Call- In Silver	4/1/2022	90434367	57 Q	~
		ERIC	JOHANNESEN	L0:New	FL	Duval	Eduardo Fernandez	Mortgage Protection Call- In Silver	4/1/2022	-	ହ	~
		THOMAS	RUBEL	L0:New	FL	Duval	Eduardo Fernandez	Mortgage Protection Call- In Silver	4/1/2022	-	ହ	~
		MARY	IMBROGNO	L0:New	FL	Duval	Eduardo Fernandez	Mortgage Protection Call- In Silver	4/1/2022	-	ହ	~

Figure 4-3: Manage Leads - List View



Figure 4-4: Leads sorted by first name



Figure 4-5: Number of Leads per Page



Figure 4-6: Create New Lead

Client Details		
First Name • :		
Last Name * :		
Lead Owner:	RADA NURALA	
Gender:	Select	[v]
Dasiness Name:	Family First Life	
008:	mm/48/3333	-
Spouse First Name:		
Spouse Last Name:		
Spouse DOB:	mm/dd/yyyy	•
Address Line 1:		
Address Line 2:		
Oty:		







4.1.3 SORTING LEADS

Click "**Sort**" to arrange the leads by First Name, Last Name, Lead Status, or Received Date in ascending or descending order.

NOTE: Leads can be sorted the same way in Card View.

4.1.4 NUMBER OF LEADS PER PAGE

The Manage Leads Screen automatically displays 20 leads per page but can display up to 100 leads per page.

Choose the number of leads to display with the dropdown menu in the lower-right corner.

4.2 CREATE A NEW LEAD

1. Open the Manage Leads Screen and click "CREATE NEW."

The Create Lead Screen displays.

- 2. Enter information in the Client Details section
- First Name and Last Name are required fields.
- The Lead Owner field automatically fills in with the name of the person creating the lead and the Business Name field automatically fills in with the Business Unit name.
- 3. Enter information in the Lead Details section.
- The Status field always shows "New" when creating a new lead.
- The Lead Date field automatically fills in with the date the lead is created.
- Select the Lead Type and enter the Premium Sold (if applicable).

NOTE: Two other fields appear for admins only: Vendor and Vendor Notes.

4. Enter all information as appropriate, then click "**SAVE**"

4

4.3 VIEW AND EDIT DETAILS



1. Click the View Lead icon to see details about leads.



Figure 4-9: Edit Lead Screen

2. The Edit Lead Screen displays

NOTE: Use the arrow buttons in the upper-right portion of the screen for moving to other Lead Screens instead of returning to the Manage Leads Screen.

This warning displays if an agent attempts to leave a page without saving information:



4.3.1 ADD NOTE OR REMINDER

4.3.1.1 ADDING A NOTE

Adding Notes helps to remember details about a client.

- Navigate to the Manage Leads Screen, select a Lead card, and click View/Edit Lead.
- 2. When the Edit Lead page displays, click **ACTIONS**, then click **Add Note/Reminder**





			The Add a n	ote box disp	lays.	
Cancel Save Medicare	e Changes Needs:		3. Click the l click Save note and	outton next t Changes. O dismiss the A	:o Note, enter the r click Cancel to e \dd a Note box	note, t rase th
Family First Life Select	Medicare Needs	P P	A confirmat corner.	ion message	displays in the up	oper-rig
Figure 4-	10 - Add a Note		D d	atabase was updated with the hanges.	e posted X	
Assets		97424	Last Modified:	04/0	34/2022	
			Vendor:	Arm	1	
Record Typ	e		Vendor Notes:	[Mo	rtgageAmount: 207471] [MortgageDate: 2021-01-15]	
Note	$\overline{}$	5419150047	Premium Sold: Suppress Lead:			
	ssets					
	Record Type Date Created Note 04/04/2022	Reminder Date	Description Chris has another	plan to compare		21
	Showing 1 - 1 of 1		$\leftarrow 1 \rightarrow$	-		
Notes are sor	ted by Date Ci	reated.				

Click 🖉 to edit or click 🧯 to delete the note.

NOTE: If the date and time for the reminder has passed the reminder cannot be edited and an error message displays.



4.3.1.2 ADDING A REMINDER

- 1. Follow steps 1 and 2 above.
- 2. Click the button next to Reminder.



The Add a Reminder box displays.

3. Enter the date and time or click \square to set the date and the time for the Reminder.

Figure 4-11 – Add a Reminder box

Figure 4-12 -Enter date and time for a Reminder

4.3.1.1 ADDING A NOTE CONT.

then пe

ght





4.3.1.2 ADDING A REMINDER CONT.

4. Click the box to enter information about the reminder, then click Save Changes.

Or click Cancel to erase the Reminder and dismiss the Add a Reminder box.

A confirmation message displays in the upper-right corner.

Database was updated with the posted

changes

ne:		Vendor:	Rgi
Reminder		Vendor Notes:	
Chausing 4 4 of 4	3522975170	Premium Sold:	
showing 1 - 1 of 1		Suppress Lead:	
Record Type Date Crea	ted Reminder Date	Description	
Reminder	04/14/2022 11:47 AM	Check on paperwork.	
Showing 1 - 1 of 1			

Click 🖉 to edit or click 📋 to delete the reminder.

NOTE: : If the date and time for the reminder has passed the reminder cannot be edited and an error message displays





4.3.1.3 REMINDER NOTIFICATION BELL

On the date for which the reminder is set, a number displays next to the notification bell showing the number of active reminders in the queue for that day. Click the number to open the reminder.

If there's several reminders, click the number to see a list, then click the reminder you need.



Figure 4-13: Client Details Screen

4.3.2 CLIENT DETAILS

The Client Details Screen contains personal information about the client such as name, address, phone number, and other demographic information.

To edit details, click details,

NOTE: All fields in this screen are editable except for Lead Owner and Business Name.

2. Click "**SAVE**", then click the **X** to return to View mode.

NOTE: Be sure to click "**SAVE**" before clicking the \times , or the edits will not be saved.

4.3.3 LEAD DETAILS

The Lead Details Screen contains information that brought in the prospective customer, including the Received Date, Lead Type and Lead ID.

NOTE: The Status field and Premium Sold field are the only editable fields in this screen.

"New" is the default status for a new contact.

- 1. Click the Edit icon $\boxed{\square}$ to enable Edit Mode.
- 2. Click the drop-down arrow in the Status field.
- 3. Select the appropriate status, click "**SAVE**", then click **X** to return to View mode.
- 4. Other fields in the Lead Details Screen:

Received Date – The date when the lead was delivered to the Manage Leads Screen, also shown in the Order Delivered email

Last Modified - The date when the lead was last modified

Vendor Name - The vendor that supplied the lead

Vendor Notes – Specific information provided by the vendor regarding that lead

Premium Sold – Shows the agreed-upon premium after a policy is sold to the lead







Lead Details	
Status:	L0:New 🗸 🗸
Received Date:	04/04/2022
Lead Type:	New Internet Life Lead
Lead ID:	30321755
Last Modified:	04/04/2022
Vendor:	Sil
Vendor Notes:	[IsSmoker: false] [Height: 68] [Weight: 160] [CurrentCoverageAmount: 250



4.3.3.1 UPDATE STATUS IN MULTIPLE LEADS

Agents can update the status in the Status field for multiple leads.

1. Select the leads needing the status update.

Figure 4-15: Updating status for multiple leads





3. Select a status from the drop-down menu and click "**UPDATE**."



4. Click **OK** to confirm

2. Click "Assign Status."

5. A Confirmation message displays.



MANAGE LEADS SCREEN — ADMINISTRATOR VIEW

A BU Admin has several functions within the Manage Leads Screen that enables viewing and, sorting leads for all agents, suppressing leads, exporting leads, and others.

	Manage Leads					X	MIKAELA FERSUSON 🍰 👻
	manage ceaus						
👩 Order Leads	Search by First Name, Last Name or Lead ID						CREATE NEW +
🕼 Manage Leads	Select All Paler Legent La Constant						E 16
Coupons	test lead account	🛛 🗌 Georgia Hil	R	Ellen Bauer	R	B ROBERT DORE	R
🖴 Manage Agents	Lead Status -	Lead Status L0:New		Lead Status L0:New		Lead Status L0:New	
簽 Ask a Specialist	State - - - - - - - - - - - - -	Sate MO County St. Levis Levid Type MixAELA FEROUSON Levid Type New Internet U.IA Levid Phone 3146324741		State 60 County 51. Louis Lead Owner MIRAELA FERUSON Lead Type New Viternet Life Lead Phere 3142221388		State MO County Crawlerd Lead Owner MICAELA FERGUSON Lead Type New Internet Life Lead Phone S737770114	
	Received Date 4/4/2022	Received Date 4/4/2022		Received Date 4/4/2022		Received Date 4/2/2022	
	Amanda Leger	😡 🗌 Donna Wade	R	UAT 26088	R	UAT 26088	R
	Lead Status CO.New State CA	Lead Status Löckew State CA		Lead Status Löckew State ID		Lead Status LO:New State ID	
	County	County		County		County	

Figure 5-1: Manage Leads Screen — Admin View



5.1 DELETING LEADS

Admins can delete leads for any agent in their Business Unit.

1. Click **ACTIONS > Suppress Lead** in the Product Details Screen.

Figure 5-2: Suppressing (Deleting) Leads



- 2. Click **OK** to confirm
- 3. A Confirmation message displays.





5.2 EXPORTING LEADS

Admins can export leads in a *.csv or *.xl file that consolidates information into one format.

1. Click the box to select all leads available on that page.



NOTE: To select additional leads on other pages, click the page numbers at the bottom of the page. When the next page opens, select the leads as needed or click "Select All."

d Date		Received Date 4/1/2022	
	← 1 2	3 4 →	

Select All	Filter	Export		Template	Assign Leads	Assign Status		
Export	Export Selected Leads							
		EXPO	RTC	sv			EXPORT EXCEL	

Figure 5-3: Exporting Leads in a *.csv or *.xlsx file

3. Click "EXPORT CSV" or "EXPORT EXCEL."

The file appears in the Downloads folder on the computer, or the location that the admin chooses.





4. Using the Export feature without selecting leads or applying any filters produces a confirmation message stating that 5,000 records is the maximum number available for export.

5.3 ASSIGNING LEADS TO A SPECIFIC AGENT

Admins can assign leads to specific agents, even if the lead is already assigned.

1. Select the leads for reassignment

2. Click "Assign Leads."

 \checkmark ssign Status Q 🔽 Ellen Bau Lead Statu L0:New

Figure 5-4: Assigning Leads

	Manage Leads						B. NewTries		
Order Leads								6	
Manage Leads	Detection of the Expert	a nep tota	Aurige Dates						
Coupors	C Georgia Mil	R	Z Illen Baser	R	BOBERT DORE	R	· Amanda La		
Manage Agents	Load Status U.D.New		Laud Status L2 New		Lead Status URNew		Load Status	01	_
Ask a Specialist	Leve NO Covery Li. Janus Land Paran Manala, Personason Land Pape Di-Addynah Papea Di-Addynah Reserved Base Auku3002		Baten Mot Creating St. Laws Lad Green Motolisk PERCOSON Lad Type Moto Monomet URI Lad Place Place Place Motolisk Received Baten Arcial 2021		Base MO Crawford Laad Type Move Internet Life Land Plane SJ2709144 Reserve Base Arti2322		Real E CA Early Date Addresses Addre	Assign Leads	Assi
	🗆 Deena Made	œ	O UAT 24488	ø	O UAT 24488	ø	O WAT 24888		
	Land Status Urbiew State CA County Las Angeles		Land Status Li Stev Statu ID County Burner		Land Status Lither State ID County Downer		Lead Status Ultraw Roma D Ceanty Distory		

Conser Leads	Manage Leads Service transmission and the service of the service	enger Lands One schedung	Norge Tracker		۵	urbart i		LANGUON & Y	
義, Ask a Specialist	C Seregis SC Und Nation White SC County SC Line County SC Line Works (SC SC SC SC SC SC SC SC SC SC SC SC SC S	GR	Eline Save Los Save	R	Constant Dots Lead Extent Usion Read Read Read Read Read Read Read Read	Q	Annacle Section Annacle A		
	Denna Wade	R	. VAT 20088	R	. WAT 20088	R	UNT 20088	R	

4. Click OK to confirm.



5. A confirmation message displays in the upper-right corner.





ADMINISTRATORS – MANAGING AGENTS

🐣 Manage Agents

Ask a Specialis

A BU Admin has several functions within the Manage Leads Screen that enables viewing and, sorting leads for all agents, suppressing leads, exporting leads, and others.

6.1 EDIT AGENT DETAILS

Use this feature to:

- Deactivate lead alerts an agent no longer needs.
- Change agent status from active to inactive.
- 1. Click "MANAGE AGENTS."





NOTE: Click Sort to sort agents accordingly.

The Manage Agents Screen displays.

2. Select the View/Edit Agent icon. The Agent Details Screen displays.



6.1.1 ACTIVATE/DEACTIVATE LEAD ALERTS

Click the box to activate or the check mark to deactivate alerts for this agent.

Figure 6-2 - Agent User Configuration



Figure 6-3 Reason for Updating

ssets			
Created By	Created Date	Notes	
MIKAELA FERGUSON	03/24/2022 11:03 AM	ete	
MIKAELA FERGUSON	03/24/2022 11:03 AM	testing	

6.2 REASON FOR UPDATING

When an administrator makes changes or updates to an agent's profile or leads, they must include a reason for the changes.

- 1. Administrator makes changes to an agent's profile and clicks "**SAVE**."
- 2. Enter the reason for the update and click "Save Changes."

The note appears in the Assets section.



INSTANT INTERNET INQUIRY

Inquiry Id: 10113172 First Name: Roland Last Name: Gardner Date of Birth: 03/31/1953 Age: 68 Address: testaddress 7688805 City: Atlanta State: CA Zip: 30344 County: Los Angeles Phone: 4043339023 Home Phone: 4043339023

6.3 MAILER TEMPLATE FEATURE

The Mailer Template serves as verification to agents and shows that the lead is legitimate. The Mailer Template also gives agents information so they can personalize their contact with the lead. The ILC application generates these templates using lead details supplied by the vendor.

Figure 6-4: Mailer Template



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