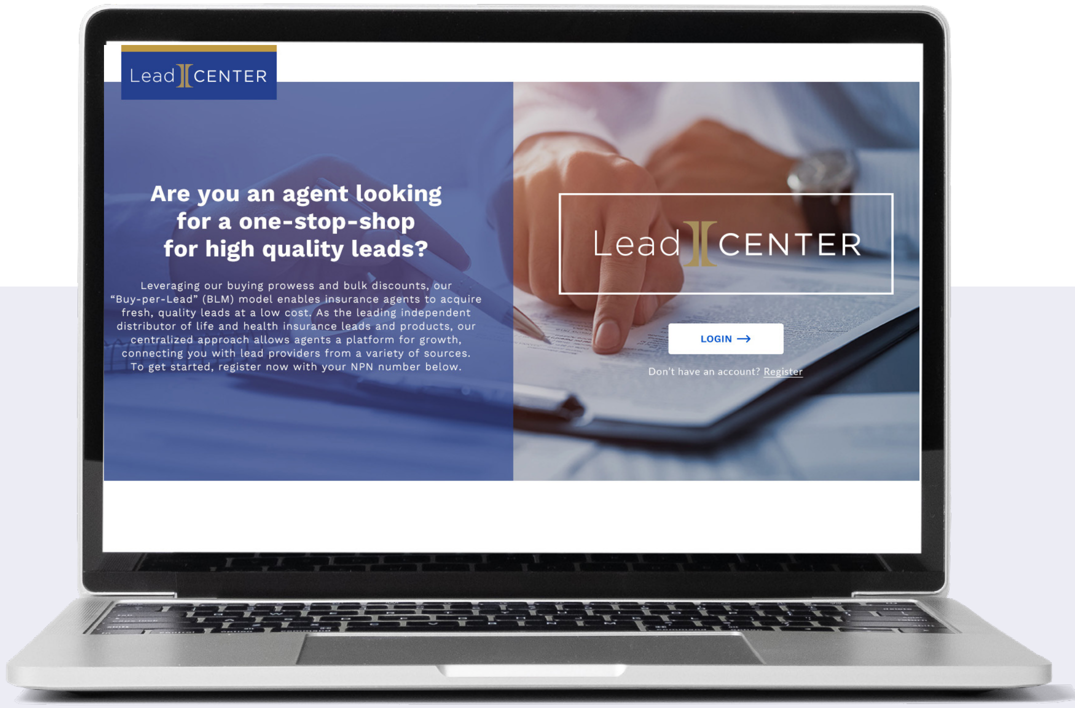
User Guide



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

v 3.1

Lead CENTER

CONTENTS

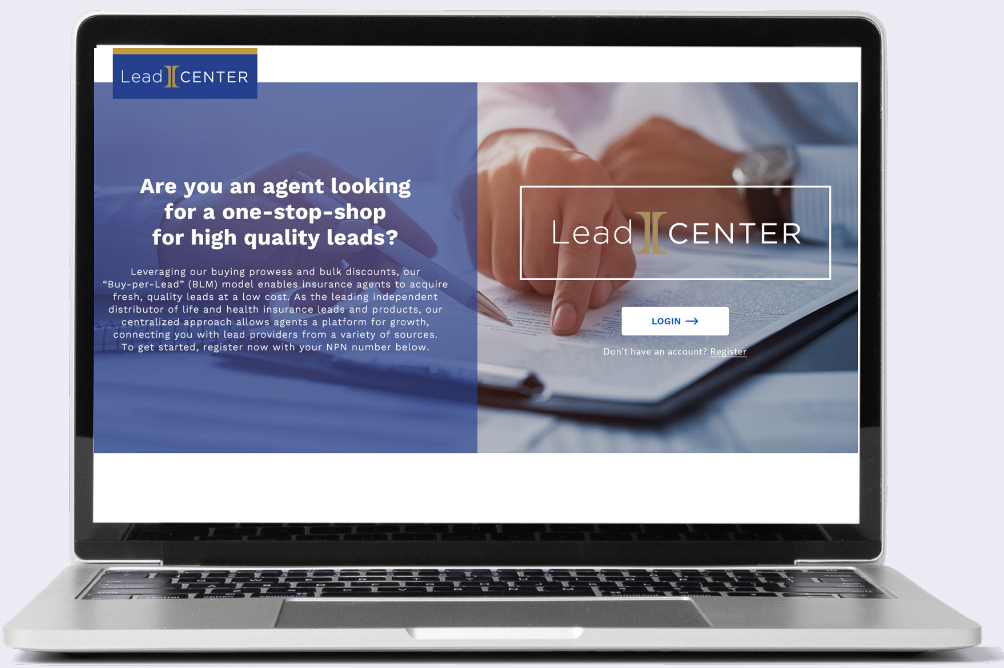
1. INTEGRITY LEAD CENTER

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:

Agent

Admin

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



REGISTRATION

All users must first register to access the ILC application. Licensed agents with a valid NPN can register for ILC. Business Unit Administrators share specific Business Unit URLs with their respective agents.

2.1 ILC REGISTRATION STEPS

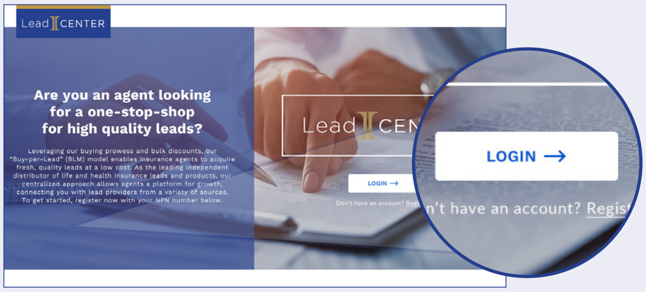


Figure 2-1: Begin registration

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

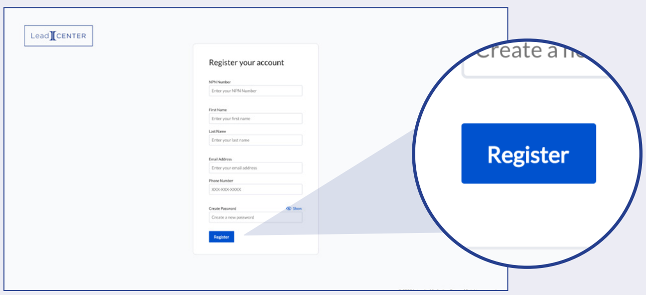


Figure 2-2: Complete registration info

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

   The system sends a confirmation email.

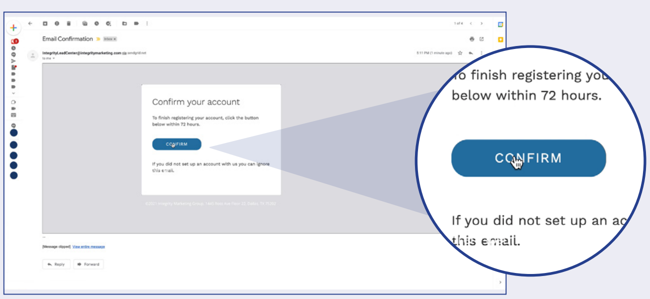
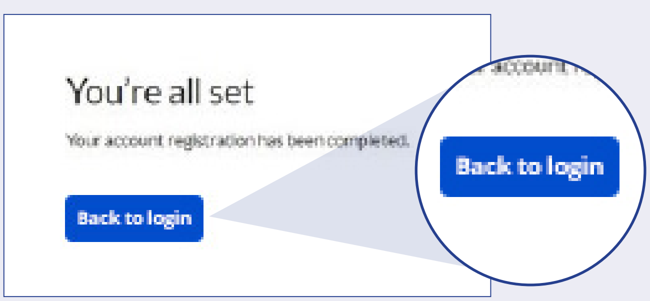


Figure 2-3: Confirm account

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.**"

2.1 ILC REGISTRATION STEPS CONT.

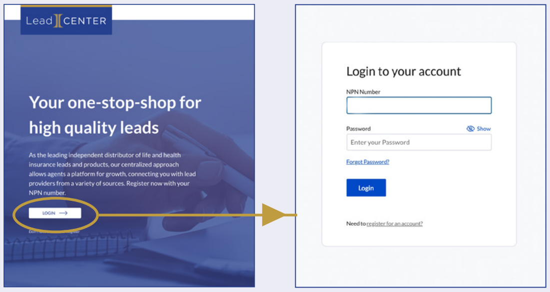


Figure 2-5: Log in to account

5. When the ILC landing screen displays, click "**Login**."

6. Enter the registered NPN number and password, then click "**Login**."

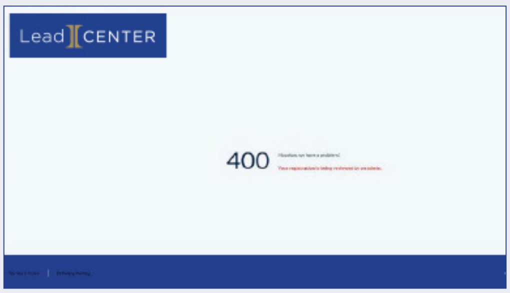


Figure 2-6: Registration under review

7. When a new user logs in for the first time, a message displays stating your BU admin must approve access.

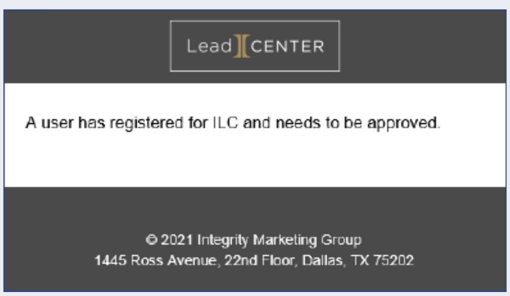


Figure 2-7: Registration notice for BU Admin

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

2.2 PASSWORD RESET STEPS

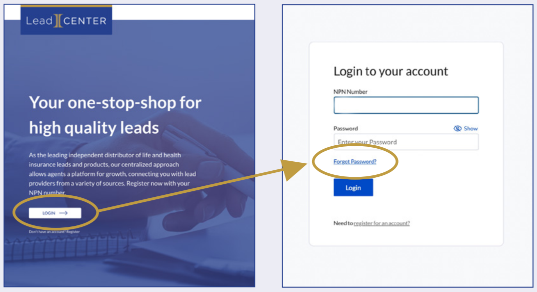


Figure 2-8: Forgot Password

1. Open the ILC application and click "**Login**."

2. Click "**Forgot Password?**"

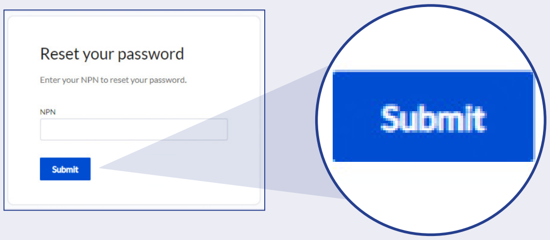


Figure 2-9: Enter NPN

3. The Reset Password screen displays. Enter the NPN and click "**Submit**."

The ILC system sends an email to the user to reset the password.

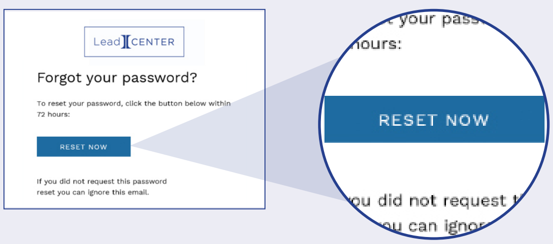


Figure 2-10: Reset Password message

4. Open the email from Integrity Lead Center and click "**RESET NOW**."

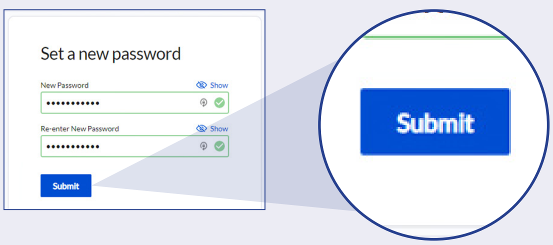


Figure 2-11: Submit new password

5. Set a new password and click "**Submit**."

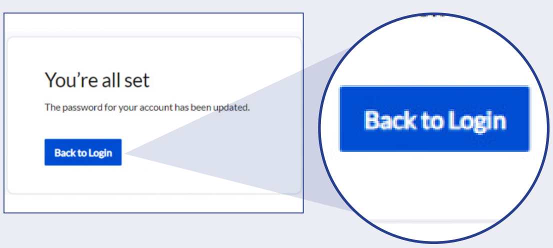


Figure 2-12: Back to Login

6. Password is now updated. Click "**Back to Logi**n" to open the ILC application and loginwith the new password.

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

1. Open the ILC application.
   The Order Leads Screen displays.

2. **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

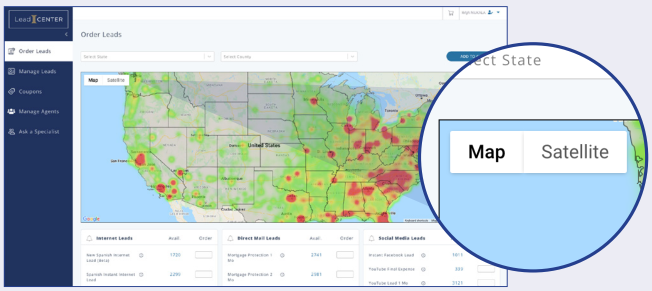


Figure 3 1: Order Leads Screen — Map view

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

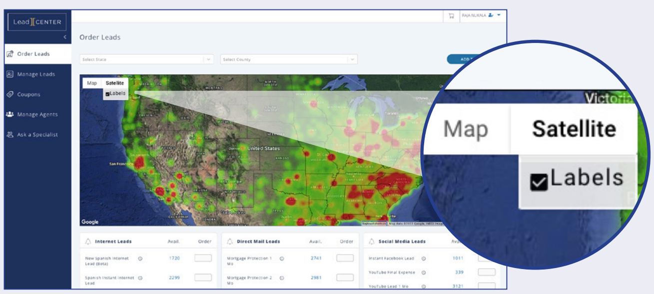


Figure 3 2: Order Leads Screen - Satellite view

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

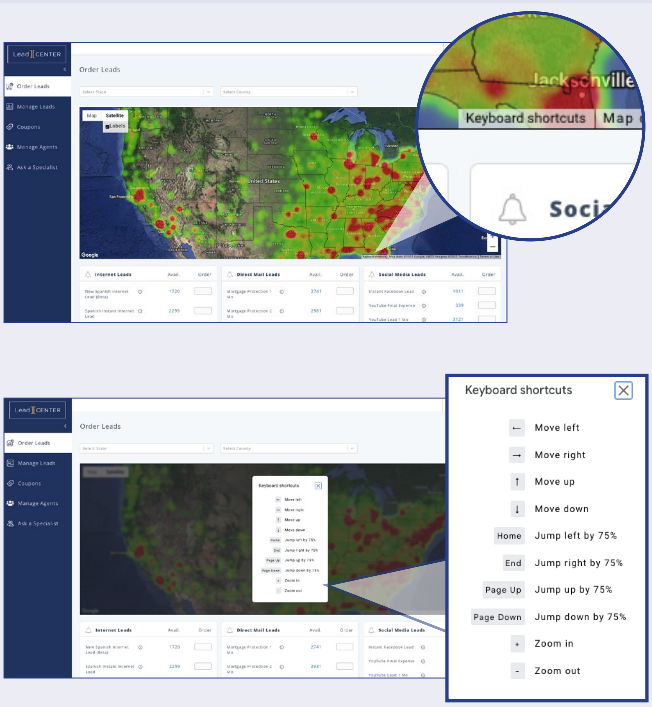
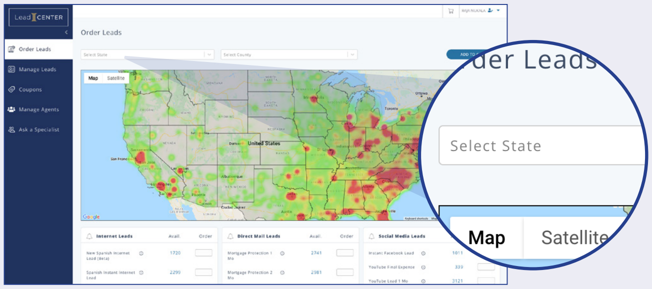


Figure 3 3: Keyboard shortcuts

3.2 FINDING LEADS

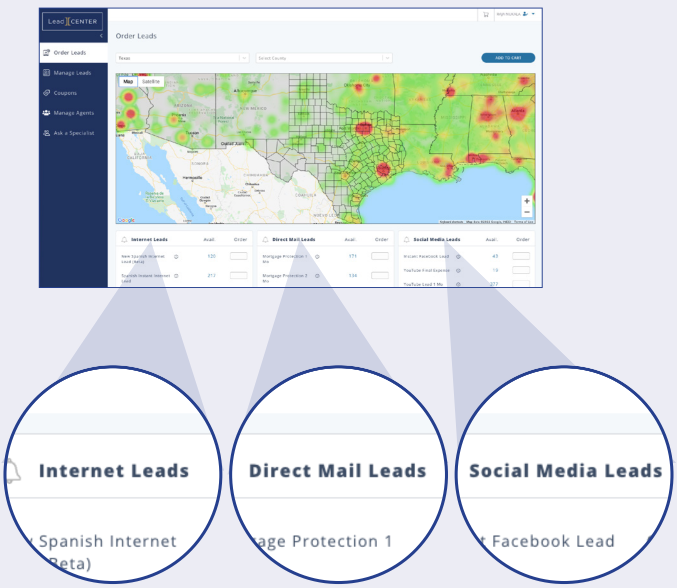


1. Enter the state and county name into the fields.

   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

3.3.1 LEAD TYPES AND INFORMATION

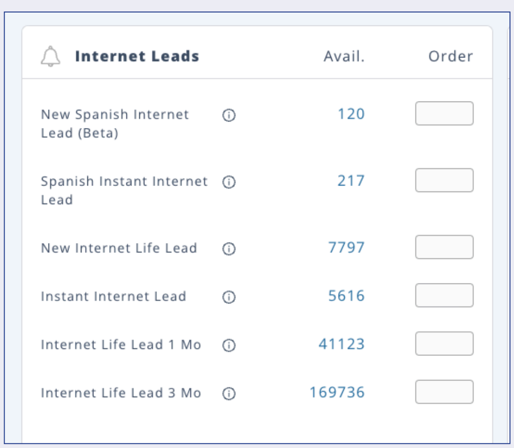


Figure 3-4: Lead Group Information

Each Lead Group shows this information:

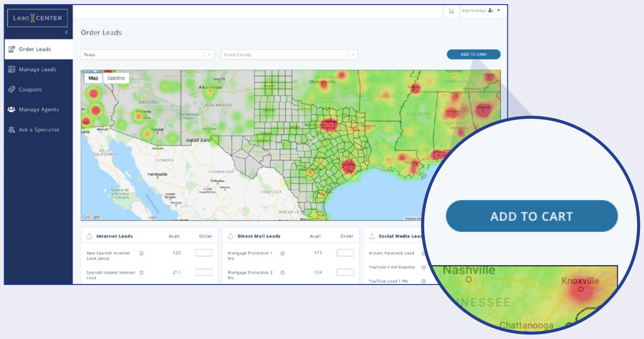
Lead Type and Information
Click the ⓘ symbol for more information on lead type and cost.

Availability
Number leads of available for that type.

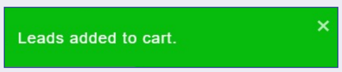
Order Quantity
Enter the desired quantity for purchase.

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

3.3.2 ORDERING LEADS

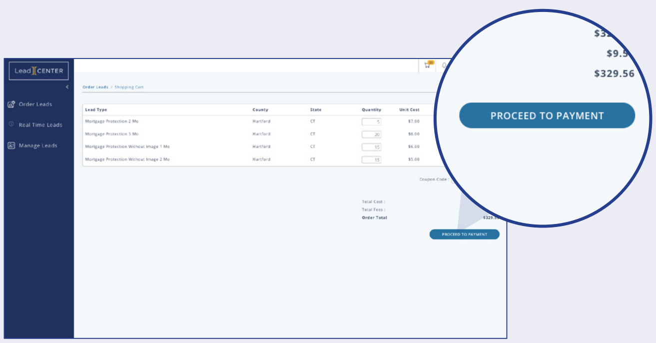


1. Use the Heat Map to select a state and county.
2. Choose a Lead Type from the Lead Groups, check the information on the Lead Type, then enter the number of leads in the Order Quantity field for that Lead Type.
3. Click **Add to cart** in the upper-right corner of the Order Leads Screen.



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.

5. Click the shopping cart icon to see details about items in the shopping cart



6. Click "**PROCEED TO PAYMENT**" to go to the Checkout Screen.

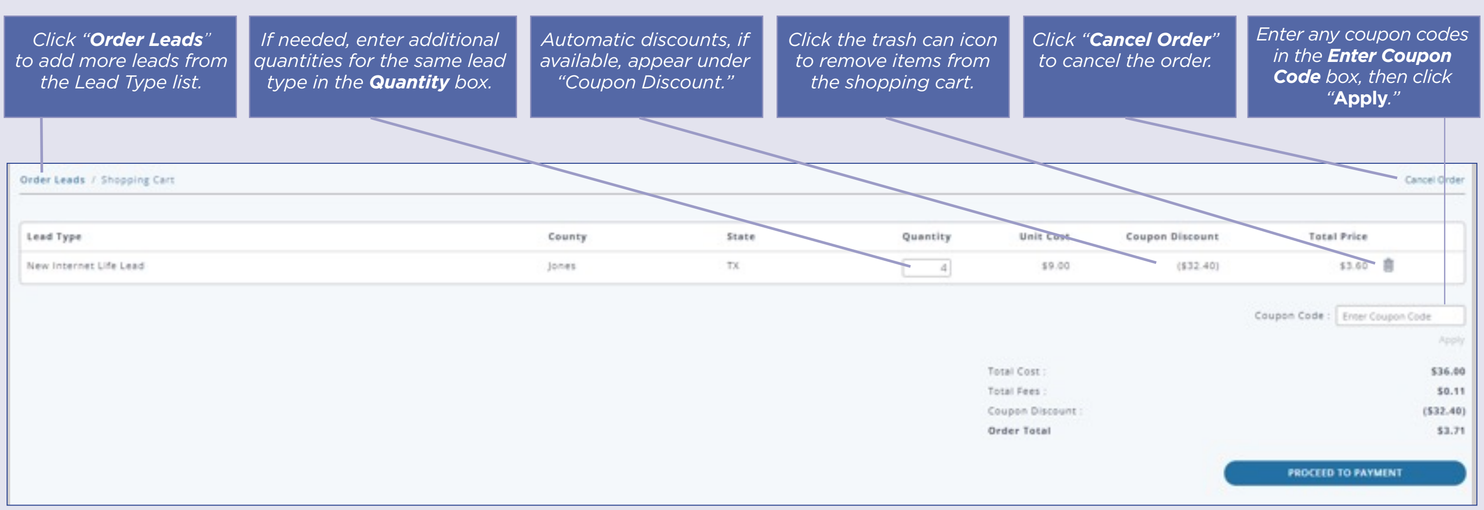
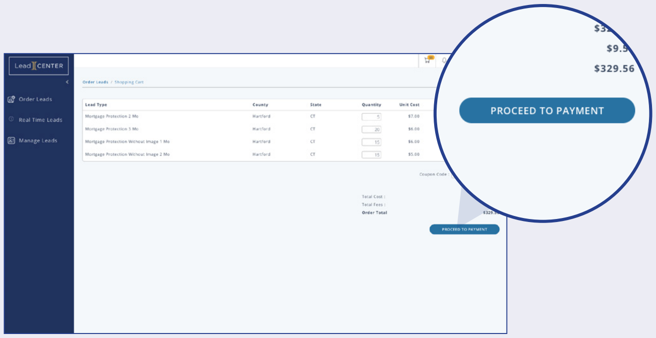


Figure 3-5: Shopping Cart details

3.3.2 ORDERING LEADS CONT.



6. Click “**PROCEED TO PAYMENT**” to go to the Checkout Screen.

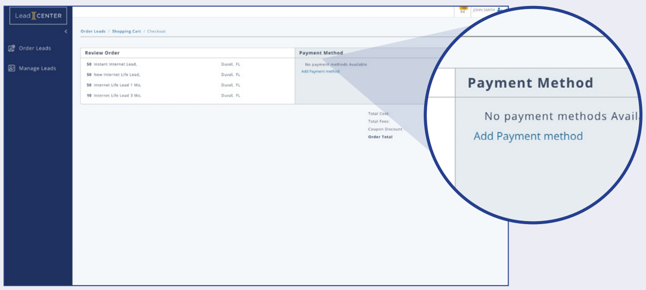
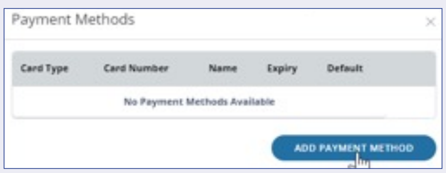
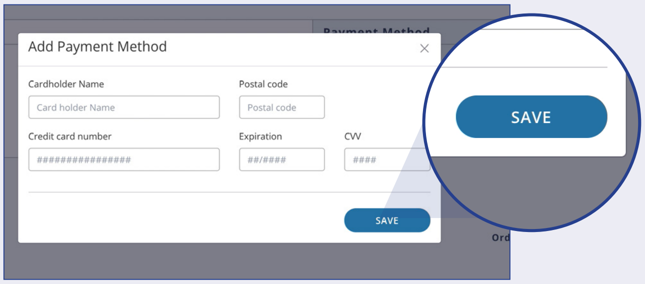


Figure 3 6: Checkout Screen

7. The Checkout Screen displays.

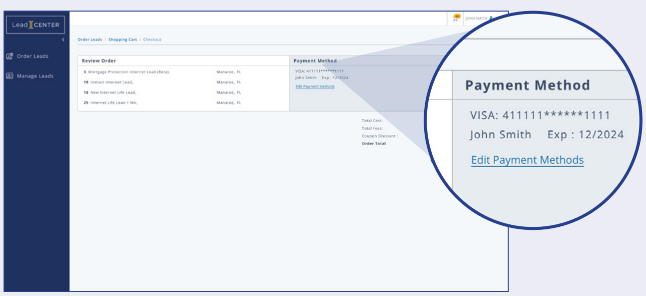


8. Click “**ADD PAYMENT METHOD**.”

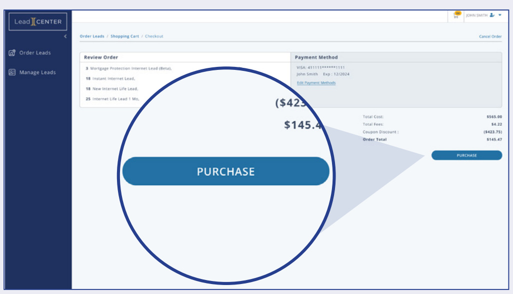


9. Enter credit card information and click ”**SAVE**.”

Multiple credit cards can be entered.

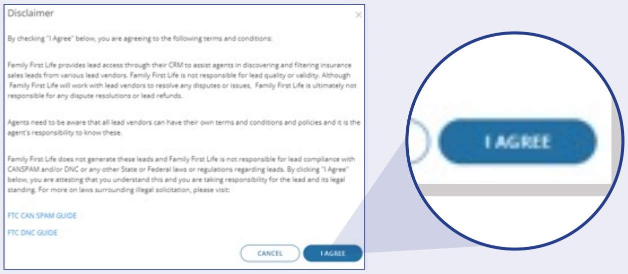


10. A confirmation displays in the upper-right portion of the screen, and the new payment method displays in the Checkout Screen



11. Click “**PURCHASE**” to buy the leads.

3.3.2 ORDERING LEADS CONT.



A disclaimer screen appears.

12. Click "**I AGREE**."

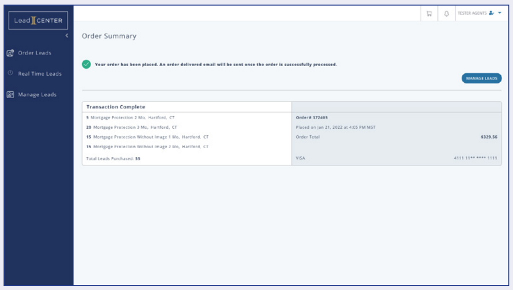
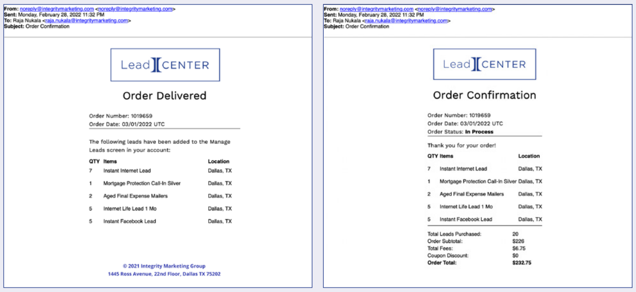


Figure 3-7: Order Summary Screen

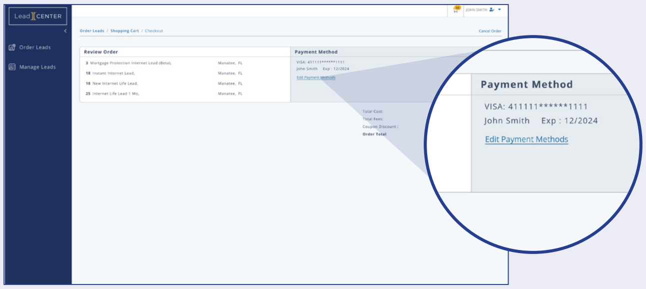
13. A confirmation message displays in the upper-right portion of the screen, and the Order Summary Screen displays the transaction.



14. The agent receives two emails verifying the leads order:

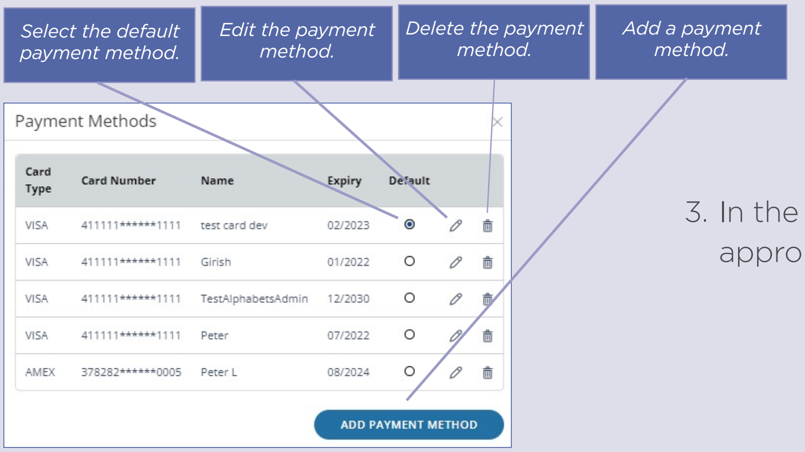
- *A confirmation email, verifying the leads purchase.*
- *And a confirmation that the leads were added to the Manage Leads Screen in the account.*

3.3.3 MANAGE PAYMENT METHODS



Users can add, delete, or modify payment methods and select or deselect default payment methods in the Payment Methods Screen.

1. Follow steps 1 – 7 above.
2. At the Checkout Screen, click "**Edit Payment Methods**."



3. In the Payment Methods Screen, choose the appropriate function:

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.

MANAGE LEADS SCREEN — AGENT VIEW

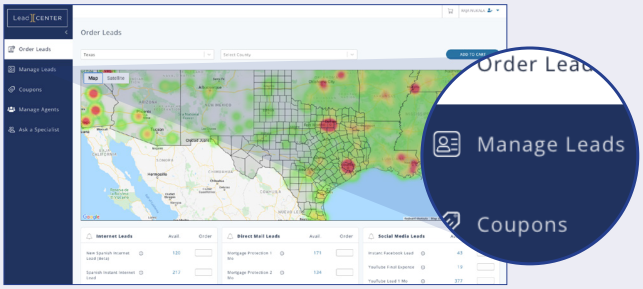
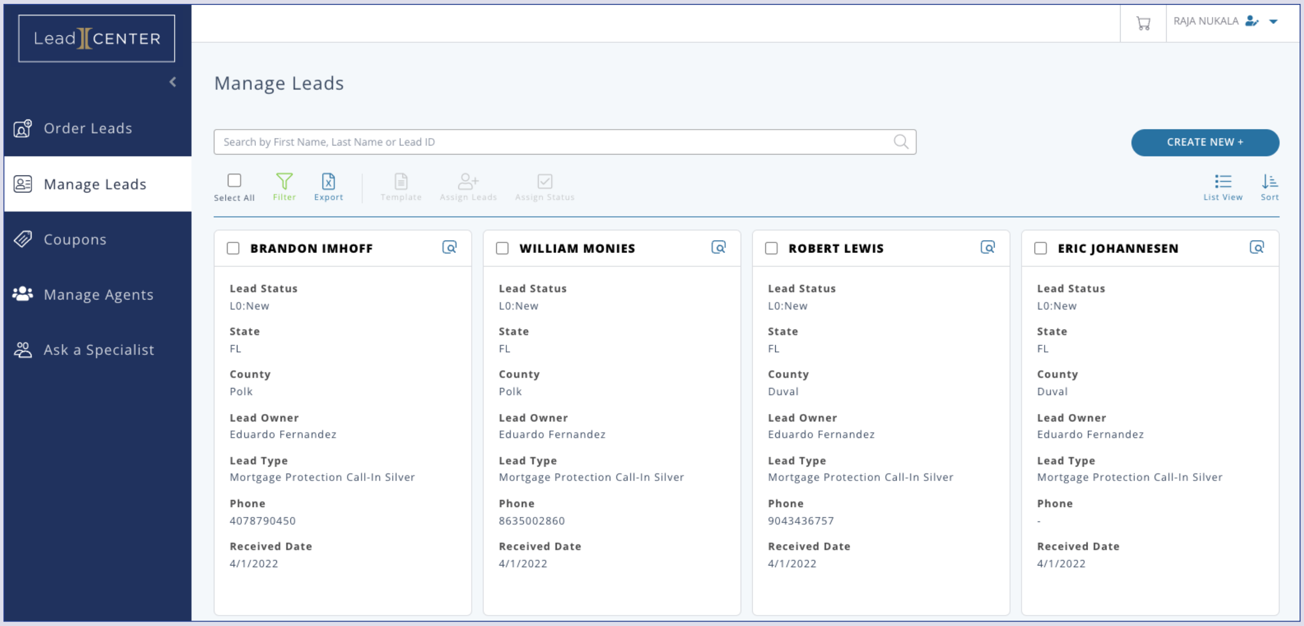


Figure 4-1: Manage Leads Screen

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.



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

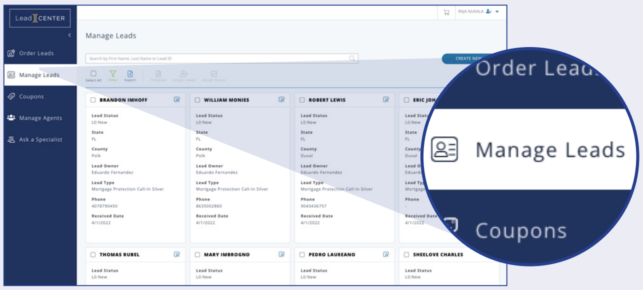


Figure 4 2: Manage Leads Screen — Card View

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.

4.1.2 LIST VIEW

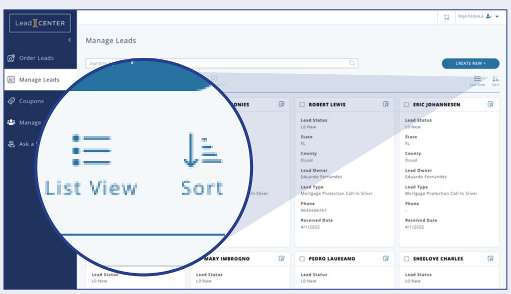


Figure 4 2: Manage Leads Screen — Card View

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

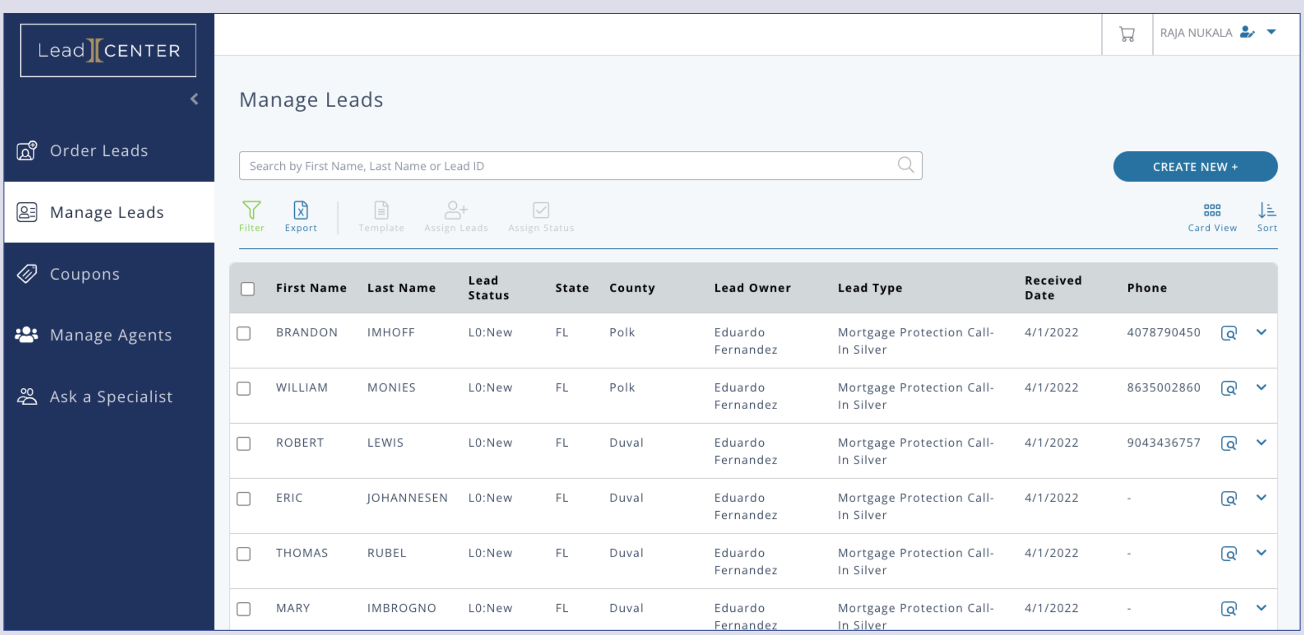


Figure 4-3: Manage Leads - List View

4.1.3 SORTING LEADS

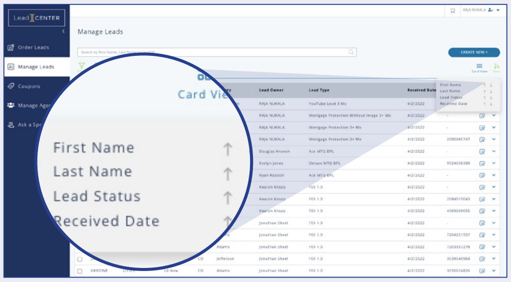


Figure 4-4: Leads sorted by first name

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

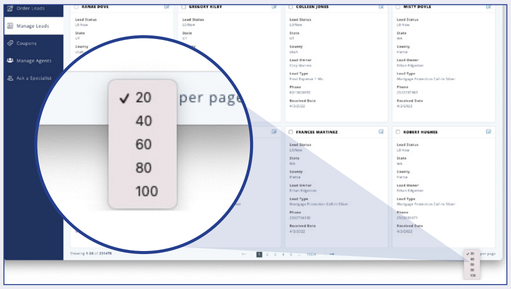


Figure 4-5: Number of Leads per Page

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 drop-down menu in the lower-right corner.

4.2 CREATE A NEW LEAD

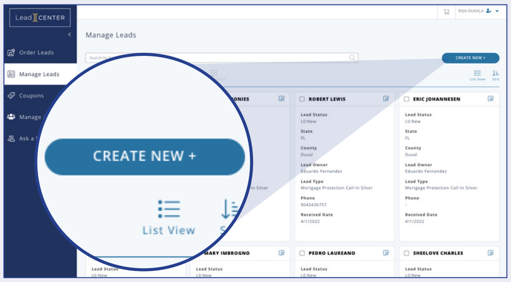


Figure 4-6: Create New Lead

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

The Create Lead Screen displays.

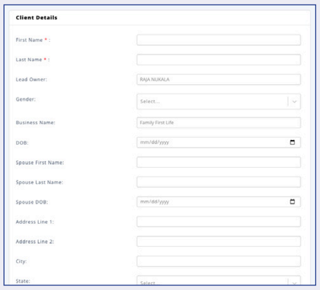


Figure 4-7: Create Lead — Client Details section

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.*

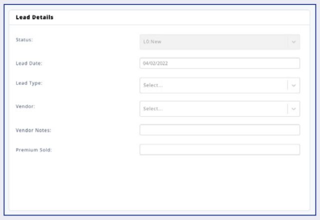


Figure 4-8: Create Lead — Lead Details section

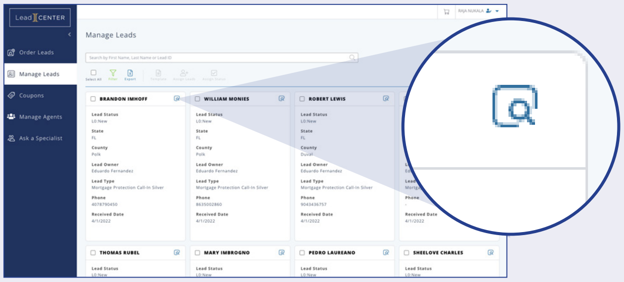
3. Enter information in the Lead Details section.

- *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**"

4.3 VIEW AND EDIT DETAILS



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

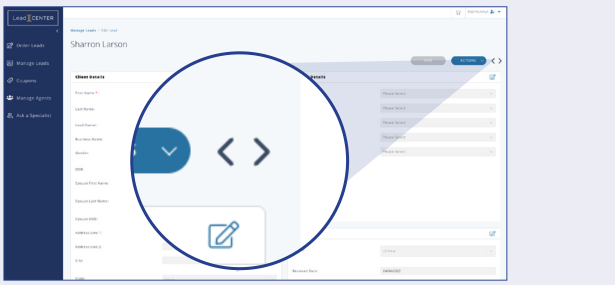


Figure 4-9: Edit Lead Screen

2. The Edit Lead Screen displays

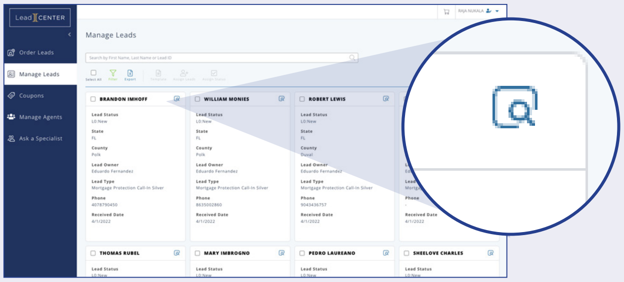
NOTE: Use the arrow buttons in the upper-right portion of the screen for moving to other Lead Screens instead of returning to the Manage Leads Screen.

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

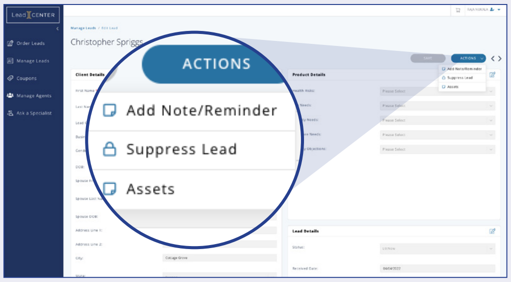
4.3.1 ADD NOTE OR REMINDER

4.3.1.1 ADDING A NOTE

Adding Notes helps to remember details about a client.



1. 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**

4.3.1.1 ADDING A NOTE CONT.

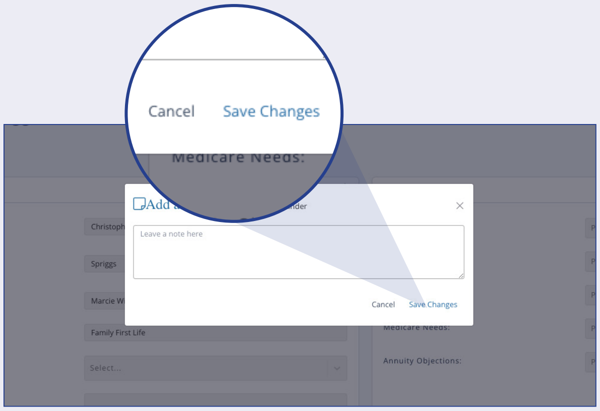
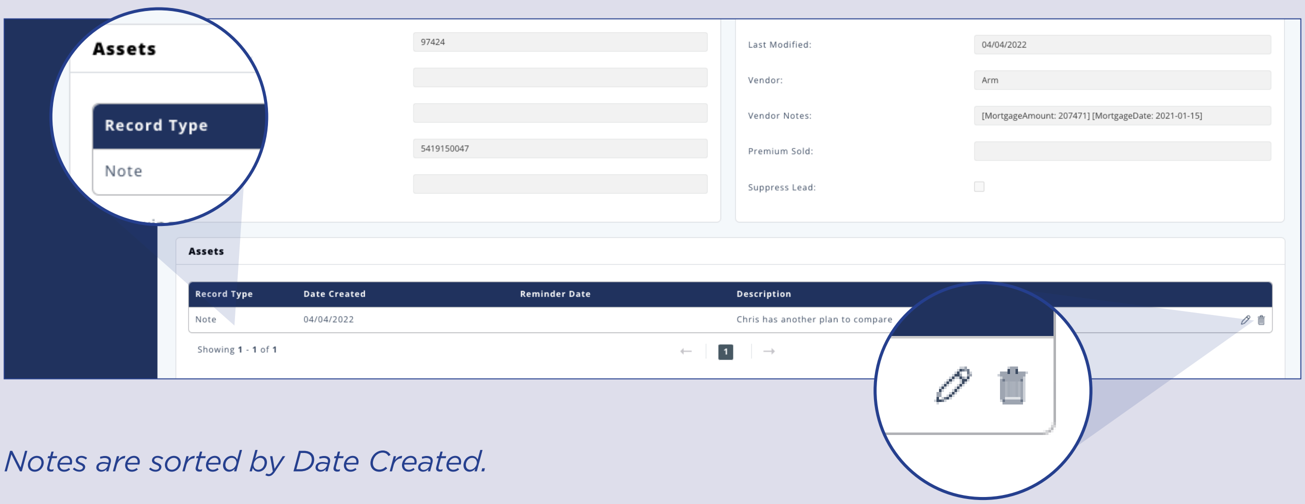


Figure 4-10 – Add a Note

The Add a note box displays.

3. Click the button next to Note, enter the note, then click Save Changes. Or click Cancel to erase the note and dismiss the Add a Note box

A confirmation message displays in the upper-right corner.

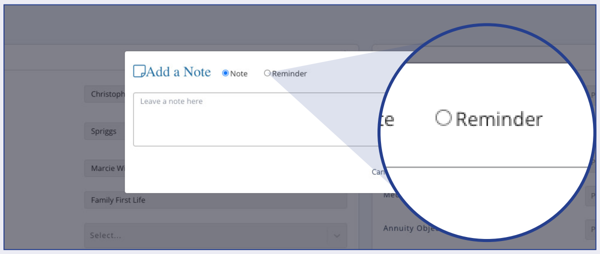


Notes are sorted by Date Created.

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.

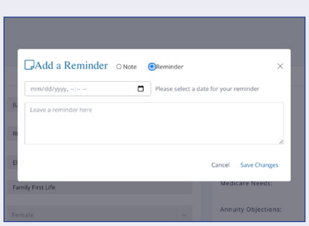


Figure 4-11 – Add a Reminder box

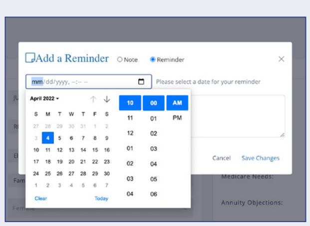
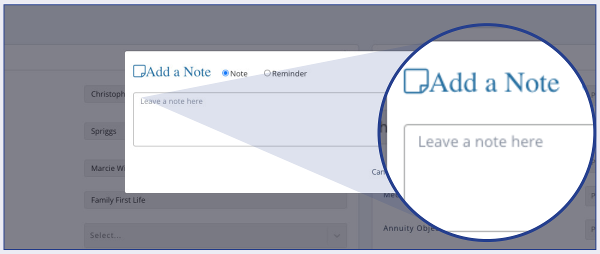


Figure 4-12 -Enter date and time for a Reminder

The Add a Reminder box displays.

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

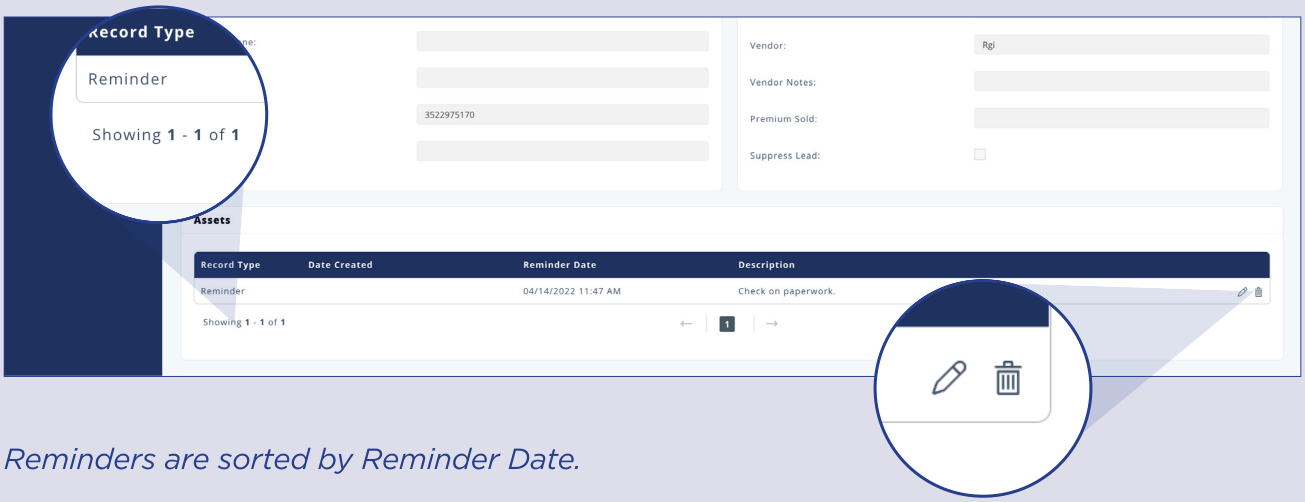
4.3.1.2 ADDING A REMINDER CONT.



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.

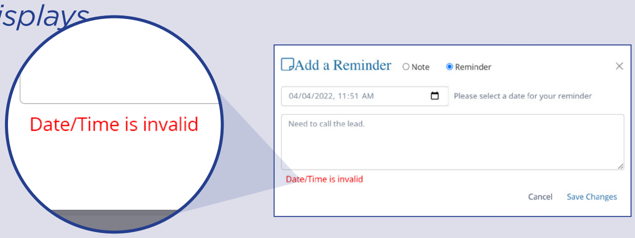
A confirmation message displays in the upper-right corner.



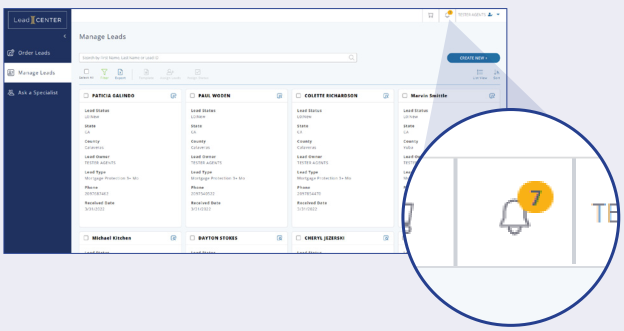
Reminders are sorted by Reminder Date.

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.

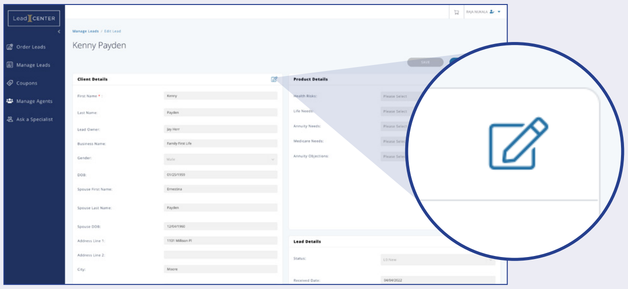


Figure 4-13: Client Details Screen

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.

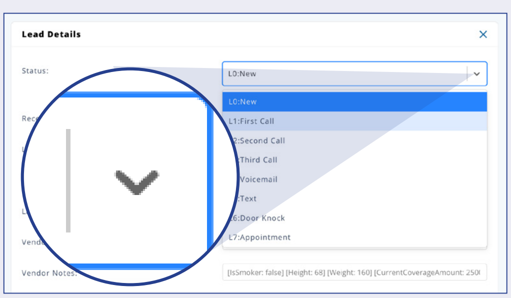
1. To edit details, click to enable Edit Mode. The icon turns into an X in Edit Mode.

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 X, or the edits will not be saved.*

Figure 4-14: Lead Details Screen



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.

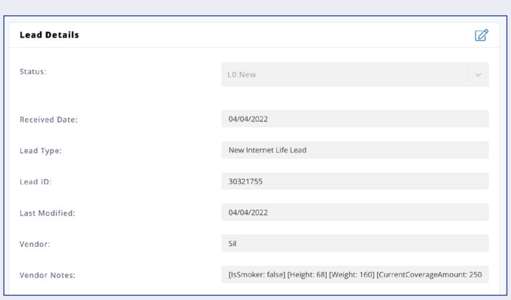
NOTE: The Status field and Premium Sold field are the only editable fields in this screen.

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

1. Click the Edit icon 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

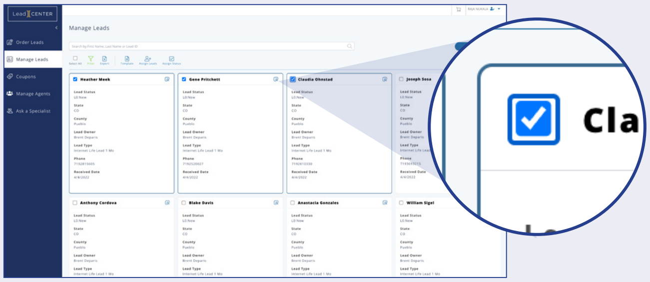
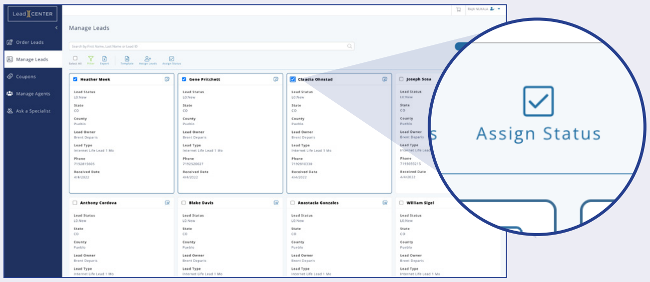


Figure 4-15: Updating status for multiple leads

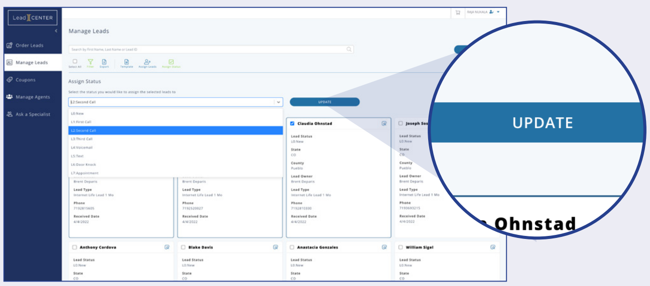
4.3.3.1 UPDATE STATUS IN MULTIPLE LEADS

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

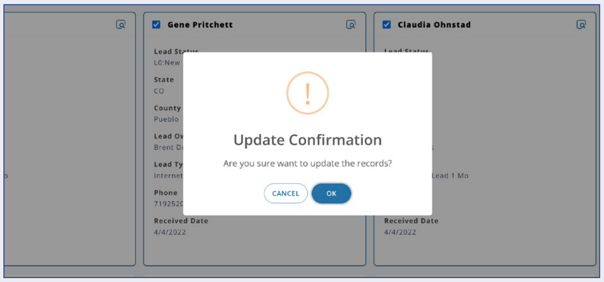
1. Select the leads needing the status update.



2. Click "**Assign Status**."

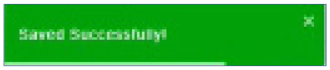


3. Select a status from the drop-down menu and click "**UPDATE**."



4. Click **OK** to confirm

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.

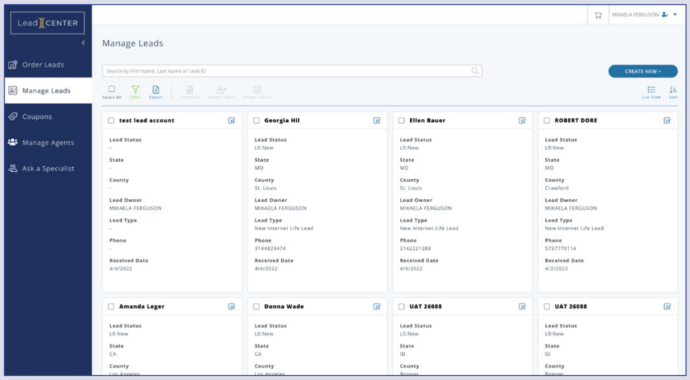


Figure 5-1: Manage Leads Screen — Admin View

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.

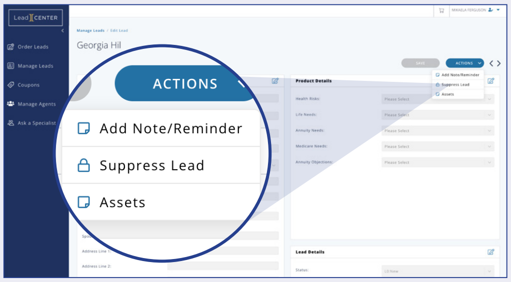
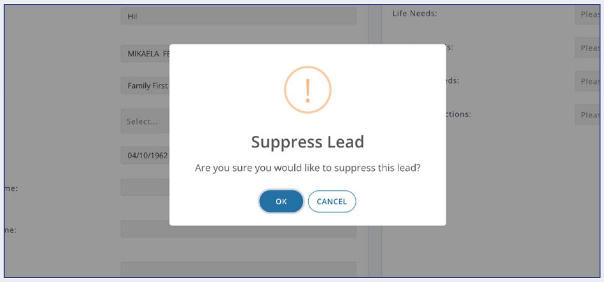


Figure 5-2: Suppressing (Deleting) Leads

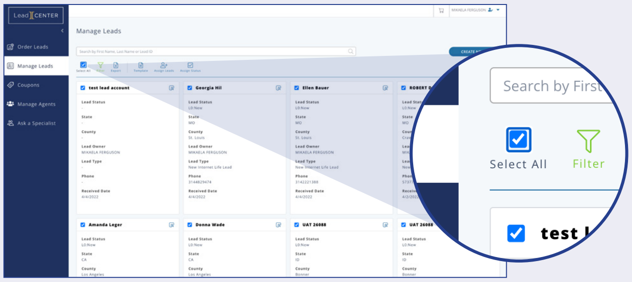


2. Click **OK** to confirm

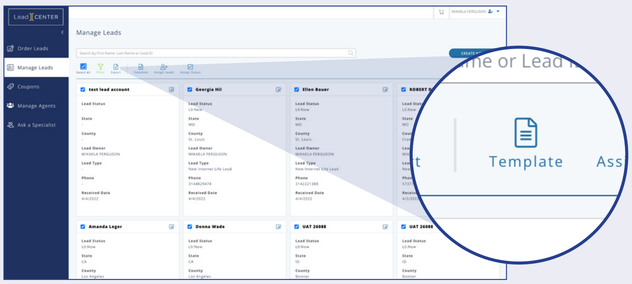
3. A Confirmation message displays.

5.2 EXPORTING LEADS

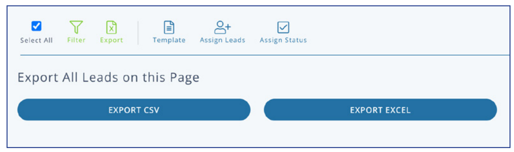
Admins can export leads in a *.csv or *.xl file that consolidates information into one format.



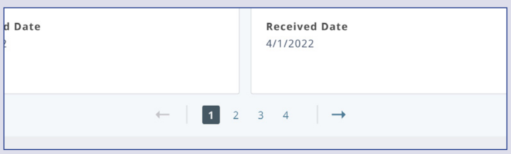
1. Click the box to select all leads available on that page.



2. Click Export Leads.



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."



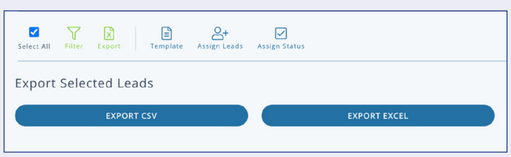
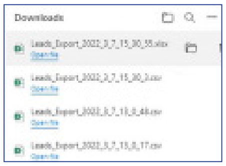
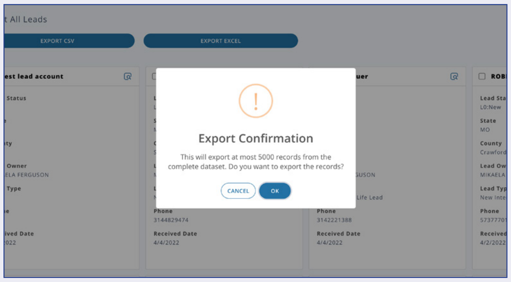


*Figure 5-3: Exporting Leads in a *.csv or *.xlsx file*

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.

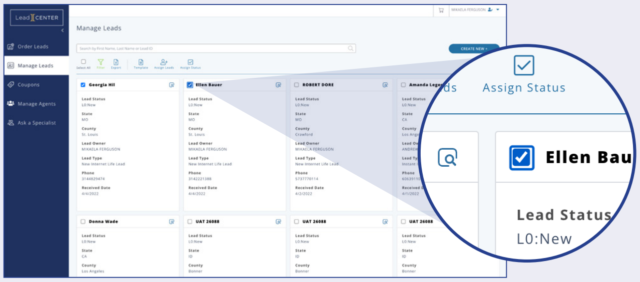
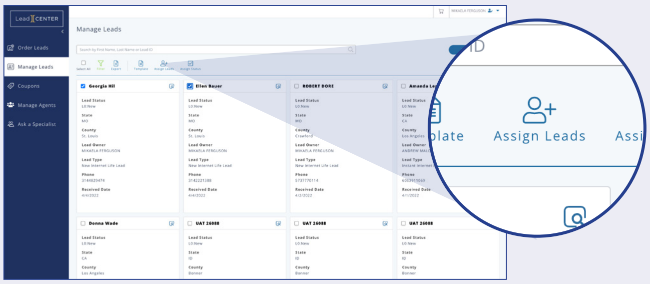
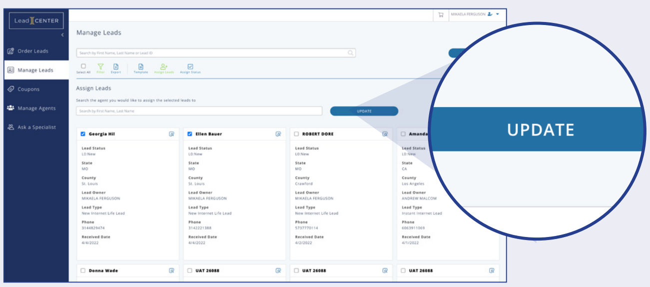


Figure 5-4: Assigning Leads

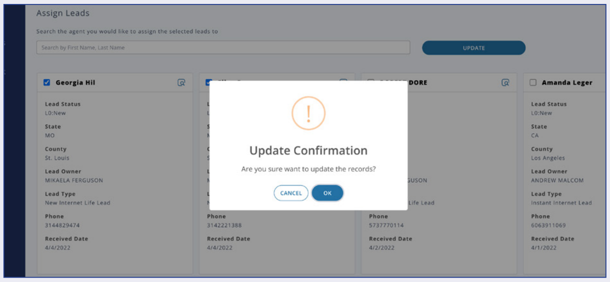
1. Select the leads for reassignment



2. Click "**Assign Leads**."



3. Enter the agent's name in the Assign Leads field and click "**UPDATE**."



4. Click OK to confirm.

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

ADMINISTRATORS — MANAGING AGENTS

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.

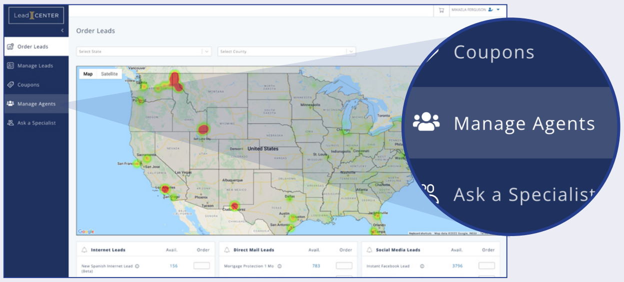
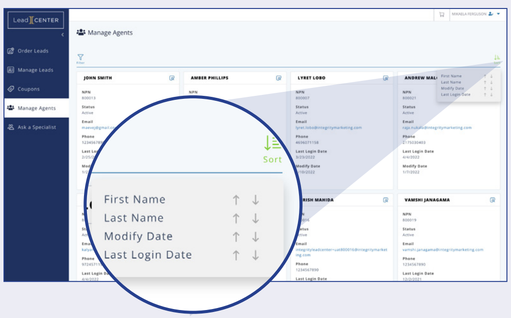


Figure 6-1 Managing Agents



6.1 EDIT AGENT DETAILS

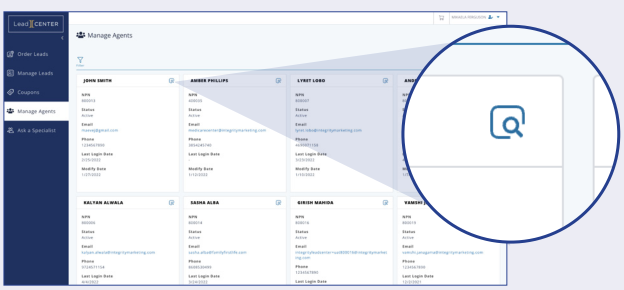
Use this feature to:

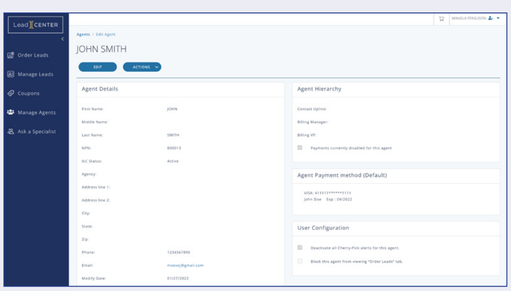
- Deactivate lead alerts an agent no longer needs.
- Change agent status from active to inactive.

1. Click "**MANAGE AGENTS**."

The Manage Agents Screen displays.

NOTE: Click Sort to sort agents accordingly.





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.

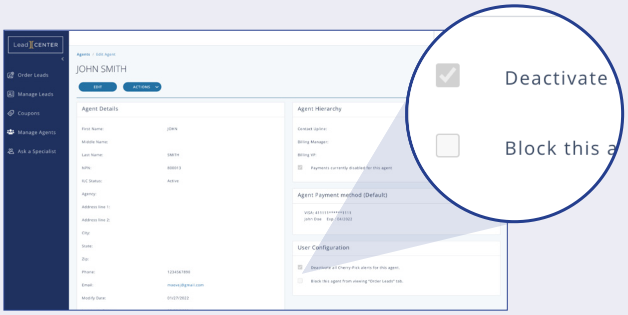


Figure 6-2 – Agent User Configuration

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**."

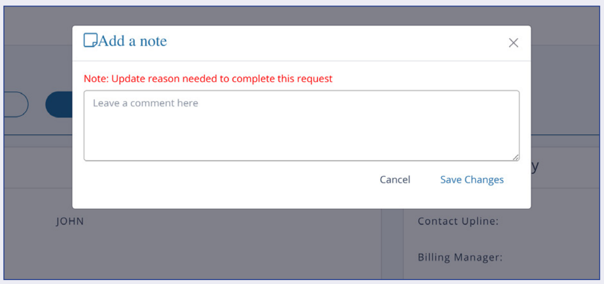


Figure 6-3 Reason for Updating

2. Enter the reason for the update and click "**Save Changes**."

The note appears in the Assets section.

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.

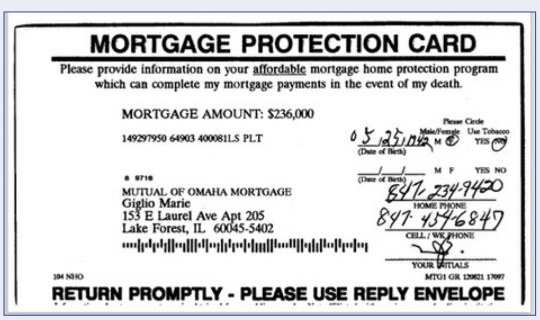


Figure 6-4: Mailer Template

LIST OF FIGURES