

SmartLeads  
User Guide

# SmartOffice<sup>®</sup>



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## Introduction

The SmartLeads module automates the process of lead importation, distribution and tracking. The tracking process begins when leads are imported to the database from a .CSV formatted file or are entered manually. The SmartLeads module, with the SmartOpportunities and Marketing Campaign modules, maintains information about each stage of the sales process, from lead inception to client status. This document is used as a brief guide for Leads Tracking Coordinators within individual offices and for Advisors that use the module.

- Leads are prospective contacts that can be tracked until they become contacts.
- Leads are collected, screened and dispatched to the respective offices by a Home Office user.
- Leads are assigned to advisors by Leads Coordinators. Leads can be accepted or rejected and returned to the Leads Coordinator.
- Generate leads reports by using a Dynamic Report™ or by exporting the data to a Microsoft® Excel® spreadsheet.
- Use the Leads Dashboard to analyze leads data.
- Track marketing opportunities with the SmartLeads module, as well as the strength of the Opportunity at different processing stages.
- The SmartLeads module displays expired leads for revocation.

## User Types in the SmartLeads Module

There are five types of SmartLeads module users - Leads Coordinator with Advisor View, Leads Coordinator Only, Advisor Only, Leads Coordinator View and Leads View. Each office can have one or more of the five types of users.

### Creating Users

To create a Leads Coordinator user, the following roles should be activated:

#### Leads Coordinator with Advisor View

User Management – User Name - User Roles/Licenses tab

- From User Roles, select **Base SmartOffice**.
- From Module/Licenses, select **Leads Coordinator, Leads and Opportunity**.

User Management – User Name - Detail tab

- User Type: Producer/Manager.

#### Leads Coordinator Only

User Management – User Name - User Roles/Licenses tab

- From User Roles, select **Base SmartOffice**.
- From Module/Licenses, select **Leads Coordinator, Leads and Opportunity**.

User Preferences - Detail tab

- User Type: Staff.

#### Advisor Only

User Management – User Name - User Roles/Licenses tab

- From User Roles, select **Base SmartOffice**.
- From Module/Licenses, select **Leads and Opportunity**.

User Management – User Name - Detail tab

- User Type: Producer/Manager.

## Leads Coordinator View

User Management – User Name – User Roles/Licenses tab

- From User Roles, select **Leads Coordinator View**.

User Management – User Name - Detail tab

- User Type: Producer/Manager.

## Leads View

User Management – User Name - User Roles/Licenses tab

- From User Roles, select **Leads View**.

User Management – User Name - Detail tab

- User Type: Producer/Manager.

## SmartLeads for Leads Coordinator with Advisor View

A Leads Coordinator with the Advisor View role can assign leads to him or herself. These users toggle between two views. The Office View is used for assigning leads to Advisors in the office and Show My Leads is used for viewing and processing his or her own leads.

The Leads Coordinator with Advisor View and Leads Coordinator Only user roles are similar except that Leads Coordinator Only does not have the Show My Leads view in the Leads Summary; therefore, the user cannot assign leads to him or herself.



- **Leads Dashboard:** Analyze the leads data.
- **Leads Search:** Display the Leads Summary.
- **Import Leads:** Import .CSV files into the SmartLeads module. This option is only available to a Leads Coordinator.
- **Console:** Configure rules for the automated leads distribution process. This option is only available to a Leads Coordinator.
- **Process:** Begin the automatic distribution of leads based on rules set using the Console. This option is only available to a Leads Coordinator.
- **Request New Leads:** Request new leads from the Home Office.

## Leads Dashboard – Leads Coordinator

The Lead Dashboard provides the users with reporting and analytical tools to view leads. From the side menu, click **Leads Tracking** and then select **Leads Dashboard** to open the Leads Dashboard Summary. Select any combination from the Report Selection Options and Leads Dashboard Options sections to display the appropriate lead information.

For options other than Dispatched, the User Name field is displayed among the Report Selection Options.

**Leads Dashboard**

Report Selection Options	Leads Dashboard Options
Reporting Period <input type="text"/>	<input checked="" type="radio"/> Dispatched <input type="radio"/> Accepted and Action Taken
Lead Type <input type="text" value="All"/>	<input type="radio"/> Created <input type="radio"/> Revocable
Campaign Name <input type="text"/>	<input type="radio"/> Assigned <input type="radio"/> All Leads
Office Name <b>Joe</b>	<input type="radio"/> All Accepted <input type="radio"/> Leads Success Ratio
User Name <input type="text"/>	<input type="checkbox"/> Include Lead Status History <input type="radio"/> Tree Control <input type="radio"/> Summary <input checked="" type="radio"/> Normal Spreadsheet
<input type="button" value="Refresh"/>	

**Leads Summary - Dispatched**

<input type="checkbox"/>	Lead Name	All Phones	Current Leads Status

Records Shown: 0 Total Records: 0

### Report Selection Options

- **Reporting Period:** This drop-down field lists the date interval for the report.
- **Campaign Name:**
  1. Click the **Campaign Name** hyperlink to open the Search Campaign dialog box.
  2. Click the **Search** button to display the Marketing Campaign list.
  3. Select the applicable **Campaign Name** hyperlink.
- **Office Name:** If the user is not an Enterprise user, the Office Name field displays the current office name.
- **User Name:** Click the **User Name** hyperlink to display the list of users. Select the **User Name** hyperlink. The User Name hyperlink does not display if the Dispatched option is selected in the Leads Dashboard Options section.

After the Report Selection Options are designated, select the appropriate option from the Lead Dashboard Options section and then click the **Refresh** button to display the results.

### Leads Search

From the side menu, click **Leads Tracking** and then select **Leads Search** to open the Leads Search dialog box. Click the **Search** button to display the Leads Summary. This spreadsheet provides a comprehensive view of all the leads dispatched to, created for, rejected by and revoked from the current office.

## Summary

The Summary tab presents an overview of the lead records. Every lead record contains all information pertaining to a lead and contains links to Campaigns, Media and Special Events.

**Unassigned - Leads Summary - Mark Paladian**

Lead Type:  Status:

Summary	Detail (P)	Additional Info.	Leads History	Documents	Custom
<input type="checkbox"/>	Lead Name	Campaign	Current Leads Status	All Phones	Days in This Status
<input type="checkbox"/>	Mr. Stephan Arms	College Education Funding	Created	Residence : (928) 555-1222	0
<input type="checkbox"/>	Miss Wenelyn V Afable	College Education Funding	Created	Residence : (928) 555-1333	0
<input type="checkbox"/>	Miss Wendy V Afable	College Education Funding	Created	Residence : (928) 555-1333	0
<input type="checkbox"/>	Mrs. Marilyn A Albano	College Education Funding	Created	Residence : (928) 555-3111	0
<input type="checkbox"/>	Miss Joyce V Albano	College Education Funding	Created	Residence : (928) 555-3111	0
<input type="checkbox"/>	Miss Helen L Alonzo	College Education Funding	Created	Residence : (928) 555-3222	0
<input type="checkbox"/>	Mrs. Emily P Alonzo	College Education Funding	Created	Residence : (928) 555-3222	0

Records Shown: 30 Total Records: 30

## Leads Summary Toolbar Buttons

- **Status:** To view the following statuses, select the corresponding option:
  - All
  - Unassigned
  - Assigned
  - Revocable
  - Accepted – All
  - Accepted with Action
  - Accepted
  - First Contact Made
  - Sales Made
  - Sales Lost
  - Call Back
  - Do Not Call
  - Appointment Made
  - Not Interested
  - In the process of making a decision
  - Working with another competition
  - Already have it
  - Agreed to Keep in Touch
  - Other
  - Closed
- **Assign to Advisor:** After selecting the appropriate lead(s), click this button to assign the lead(s) to an advisor in the office. A dialog box displaying a list of advisors opens for selection.
- **Auto Assign Leads Using Record Match:** This feature compares the selected lead with the existing contacts in the database to check for duplication. If a lead is found to exist as a contact, it can be directly assigned to the user linked to that contact.



- **Reject Leads from Office:** After selecting the appropriate leads, click this button to reject the selected leads and return them to the Home Office. Only leads sent by the Home Office or other offices can be rejected. Leads created by the same office cannot be rejected. When this button is selected, a confirmation message is displayed. Click the **OK** button to confirm rejection. Enter the reason for the rejection. The rejected lead will be removed from the Leads Summary.
- **Forward Leads:** This function is used to forward one or more leads to another office or Advisor.
  - Enter the name of the office to be forwarded the selected lead(s).
  - To assign these leads(s) to a specific advisor in the selected office, enter the SmartOffice login name of the advisor.
- **Campaign Mass Assignment:** After selecting the appropriate leads records, click this button to open the Campaign Search dialog box. Click the **Search** button to display all the campaigns in the database and then select the appropriate marketing campaign. The list is updated to reflect the newly selected marketing campaign.
- **Show My Leads:** Show My Leads displays the Advisor view for the logged in Leads Coordinator. The leads that have been assigned to the Leads Coordinator are displayed here. The layout of this view is similar to the Leads Summary for an Advisor user except for an additional Back to Office View button.
- **Notes:** After selecting the appropriate leads record, click this button to view, add or delete notes associated with the lead.
- **Send E-mail to Advisors:** To send an e-mail alert to an advisor of leads that have been assigned, click the **Send E-mail to Advisors** button. Note that this will only work for leads that have changed the current status to today. This feature will not work for a lead status that is greater than one day old. Only one alert message can be sent to an advisor per day. For Setup, in the **User Preferences – Basic Info** tab (under **User Setup** from the side menu), enter the appropriate e-mail address in the Send Alert Notification to the Following E-mail Address field and then click the **Save** button.

## Detail Tab

The Detail tab displays details regarding the specified lead.

### Lead - Mr. Stephan Arms

Summary	Detail (P)	Additional Info.	Leads History	Documents	Custom
<b>Personal Information</b>					
Last Name	Arms	Suffix			
First Name	Stephan	Middle Name			
Greeting		Title	Mr.		
Lead Type	Individual				
Source		Sub-Source			
Birth Date	07/10/1964	Age			
Marital	Married	Gender	Male		
Tobacco					
Status	Created	Status Date	01/12/2006 09:04AM		
<b>Residence Address</b>					
Street	2274 W Olive Way				
Line2	Apt 121				
City	Chandler	State/ZIP Code	Az	85248-4184	
Country					
<b>Business Address</b>					
Street					
Line2					
City		State/ZIP Code			
Country					
<b>Business Information</b>					
Employer					
Occupation					
Job Title					
E-mail					
<b>Needs</b>					
<b>Phone</b>					
Residence	928	555-1222			
Business					
<b>Campaign Information</b>					
Campaign	College Education Funding				
Media					
Special Events					

### Personal Information Section

- **Last Name:** This mandatory field lists the lead's last name.
- **First Name:** The lead's first name.
- **Lead Type:** The Lead Type can be Individual, Business or Advisor.
- **Greeting:** The preferred name to use when addressing the lead.
- **Source:** The source of the lead (e.g., magazines, trade shows, brochures).
- **Birth Date:** The lead's date of birth. Click the **Calendar** button and then select the appropriate date.
- **Marital:** This drop-down field lists the marital status of the lead.
- **Tobacco:** This field notes the lead's history of tobacco use.
- **Status:** The current stage of the lead. This field is automatically populated by the system.
- **Suffix:** The lead's name extension, if any.
- **Middle Name:** The lead's middle name.
- **Title:** The lead's title.
- **Sub-Source:** The sub-source of the lead, if applicable.
- **Age:** The lead's actual age.
- **Gender:** Lists whether the lead is a male or female.
- **Status Date:** The date the status was last updated; the date is automatically populated.

### **Business Information Section**

The below options are displayed only if the Lead Type is set as Individual.

- **Employer:** The name of the lead's employer.
- **Occupation:** The occupation of the lead.
- **Job Title:** The lead's job title.
- **E-mail:** The lead's e-mail address.

### **Needs Section**

These fields list the determined financial needs of the contact. Click the down-arrow at the end of each of these fields to select the appropriate product types.

### **Residence Address Section**

- **Street:** The residence address of the lead. For example, Street or P.O. Box.
- **Line2:** The residence address of the lead. For example, Suite/Apartment number.
- **City:** The City where the lead resides.
- **State/Zip:** The State where the lead resides and the corresponding ZIP Code.
- **County:** The County where the lead resides.

### **Business Address Section**

- **Street:** The business address of the lead. For example, Street or P.O. Box.
- **Line2:** The business address of the lead. For example, Suite/Apartment number.
- **City:** The City where the lead's business is located.
- **State/Zip:** The State where the lead's business is located and the corresponding ZIP Code.
- **County:** The County where the lead's business is located.

### **Phone Section**

- **Residence:** The residence telephone number of the lead.
- **Business:** The business telephone number of the lead.

### **Campaign Information Section**

- **Campaign:** This field lists any campaign association. Click the field title hyperlink and type in the name of the campaign or click the **Search** button to view a list of existing campaigns. Select the appropriate campaign to associate it with the lead.
- **Media:** This field lists any media association. Click the field title hyperlink and type the name of the media or click the **Search** button to view a list of existing media. Select the appropriate media to associate it with the lead.
- **Special Events:** This field lists any special event association. Click the field title hyperlink and type the name of the special event or click the **Search** button to view a list of special events. Select the appropriate event to associate it with the lead.

## Additional Info Tab

On the Additional Info tab, more information about the lead can be listed, such as the spouse's personal information, spouse's business information, tax ID, etc.

**Lead - Mr. Stephan Arms**

<span>Summary</span>   <span>Detail (P)</span>   <span>Additional Info.</span>   <span>Leads Hstory</span>   <span>Documents</span>   <span>Custom</span>		
<b>Spouse's Personal Information</b>		<b>Creation Details</b>
Last Name <input type="text"/> Suffix <input type="text"/> First Name <input type="text"/> Middle Name <input type="text"/> Greeting <input type="text"/> Title <input type="text"/> Birth Date <input type="text"/> Age <input type="text"/>	Created By Office <b>Joe</b> Created By <b>Mark Paladian</b> Created On <b>01/12/2006 09:04AM</b>	
<b>Spouse's Business Information</b>		<b>Other Information</b>
Employer <input type="text"/> Occupation <input type="text"/> Job Title <input type="text"/> E-mail <input type="text"/>	Tax ID <input type="text"/> External ID <input type="text"/> Potential <input type="text"/> Score <input type="text"/> Leads Follow-up <input type="text"/> HO Client ID <input type="text"/> Nationality <input type="text"/> Language <input type="text"/> Priority Lead <input type="checkbox"/>	
<b>Remarks</b> <span style="float: right;">ABC </span>		
<input style="width: 100%; height: 100%;" type="text"/>		
<b>Action</b> <span style="float: right;">ABC </span>		
<input style="width: 100%; height: 100%;" type="text"/>		

### Spouse's Personal Information

- **Last Name:** The last name of the spouse.
- **First Name:** The first name of the spouse.
- **Greetings:** The preferred name to use when addressing the spouse.
- **Birth Date:** The spouse's date of birth. Click the **Calendar** button and then select the date.
- **Suffix:** The name extension of the spouse.
- **Middle Name:** The middle name of the spouse.
- **Title:** The title of the spouse.
- **Age:** The actual age of the spouse.

**Spouse's Business Information** (Business Contact will not be created with this information upon acceptance of a Lead)

- **Employer:** The name of the spouse's employer.
- **Occupation:** The occupation of the spouse.
- **Job Title:** The job title of the spouse.
- **E-mail:** The lead's e-mail address.

### Creation Details

- **Created By Office:** The name of the office that created the lead.
- **Created By:** The name of the user that created the lead.
- **Created On:** The date and time when the lead was created.

## Other Information

- **Tax ID:** The social security number or taxpayer ID number.
- **Potential:** The estimated amount of sales.
- **Leads Follow-up:** The number of days before following the lead.
- **Nationality:** The citizenship of an individual.
- **Priority Lead:** The priority of the lead.
- **External ID:** The code to identify the lead.
- **Score:** The score of the lead.
- **HO Client ID:** The Home Office Client ID.
- **Language:** The language that is spoken.

## Remarks Section

Use the Remarks section to provide further details about the lead.

## Action Section

Use the Action section to provide any action that needs to take place with the lead.

## Leads History Tab

The Leads History tab records the tracked activities associated with a lead. Whenever the status or stage changes, a note is added here. Stages include – In Collection Center, In Data Cleaning Center, In Call Center, In Dissemination Center, In Agent Office and Dead Leads.

**Lead - Mr. Stephan Arms**

Office Full Name	Initiated By	Status Date	Leads Status	Assigned Office	Stage
Joe	Mark Paladian	01/12/2006 09:04AM	Created	Joe	In Agent Office

## Documents Tab

The Documents tab keeps a record of documents related to the lead.

**Lead - Mr. Stephan Arms**

Description	Open	Keyword	Created On
-------------	------	---------	------------

## Custom Tab

The Custom tab stores custom data related to the lead.

Lead - Mrs. Nancy Ericson

Summary Detail (P) Additional Info. Leads History Contact Policy Summary Documents Custom

Alphanumeric Fields	Numeric Fields	Date Fields
AlphaNum1	Num1	Date1
AlphaNum2	Num2	Date2
AlphaNum3	Num3	Date3
AlphaNum4	Num4	Date4
AlphaNum5	Num5	Date5
AlphaNum6	Num6	Date6
AlphaNum7		Date7
AlphaNum8		Date8
AlphaNum9		Date9
AlphaNum10		Date10
AlphaNum11		Date11
AlphaNum12		
AlphaNum13		
AlphaNum14		
AlphaNum15		
AlphaNum16		
AlphaNum17		
AlphaNum18		
AlphaNum19		
AlphaNum20		

Integer Fields
Int1
Int2
Int3
Int4
Int5

Lookup Fields
Int6
Int7
Int8
Int9
Int10

Check Boxes
YesNo1 <input type="checkbox"/>
YesNo2 <input type="checkbox"/>
YesNo3 <input type="checkbox"/>
YesNo4 <input type="checkbox"/>
YesNo5 <input type="checkbox"/>
YesNo6 <input type="checkbox"/>
YesNo7 <input type="checkbox"/>
YesNo8 <input type="checkbox"/>

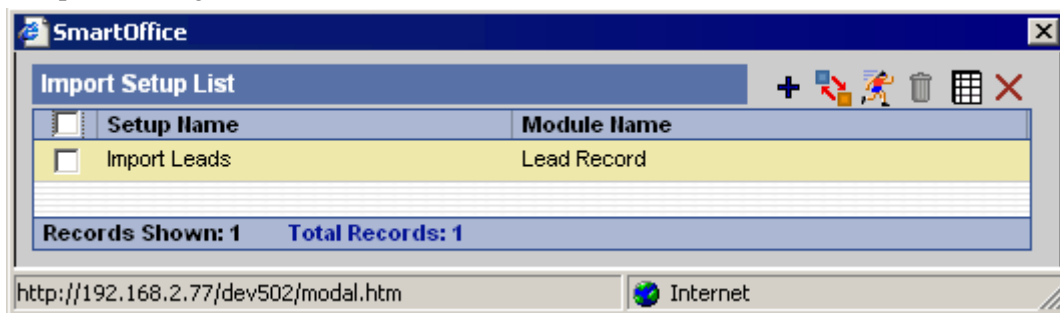
## Import Leads

Leads can be imported automatically into the system from a .CSV file. For more information, see the *SmartOffice Import/Export* documentation.

## Add a Setup

To add a new Import setup to the list of default setups, proceed as follows:

1. From the side menu, click **Leads Tracking** and then select **Import Leads** to open the Import Setup List dialog box.



2. In the Setup List section, click the **Add** button to open the File to be Used for Mapping dialog box.

**File to be used for Mapping**

Select the file and data format. Depending on the file size and connection speed, this process may take several minutes to upload.

Select File

Data Format

Column Headings Present

Field Separator (e.g. , | ~ etc.). Default value is !

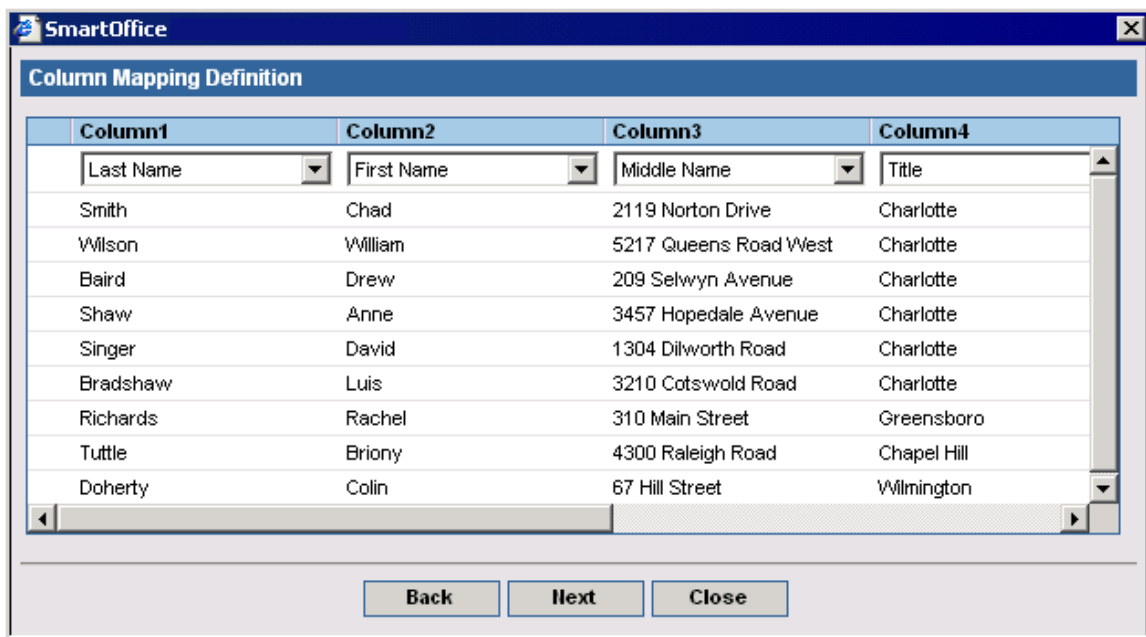
**Select a Campaign**

http://192.168.2.59/QA50/modal.htm Internet

3. In the File to be Used for Mapping dialog box, click the **Browse** button to select the file. Locate the file and then select a data format from the Data Format drop-down list. Select the appropriate campaign name (if applicable) and then click the **Next** button.

- In the Column Mapping Definition spreadsheet, the details in the file are mapped to appropriate fields in SmartOffice (e.g., Last Name, Business Address, etc.). After all the fields have been mapped appropriately, click the **Next** button.

**Note:** If the Lead Type column is mapped with Advisor/Individual/Business then only the imported Leads will be mapped to the lead type; but, if no mapping is specified in the Lead Type field, the imported Leads will be designated as of the Individual type.

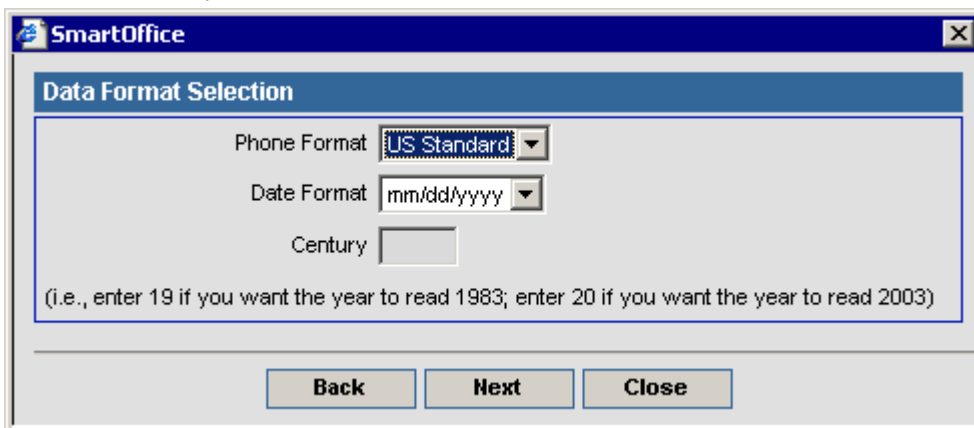


The dialog box titled "SmartOffice" contains a "Column Mapping Definition" window. It features a table with four columns: Column1, Column2, Column3, and Column4. Each column has a dropdown menu above it. The table contains the following data:

Column1	Column2	Column3	Column4
Last Name	First Name	Middle Name	Title
Smith	Chad	2119 Norton Drive	Charlotte
Wilson	William	5217 Queens Road West	Charlotte
Baird	Drew	209 Selwyn Avenue	Charlotte
Shaw	Anne	3457 Hopedale Avenue	Charlotte
Singer	David	1304 Dilworth Road	Charlotte
Bradshaw	Luis	3210 Cotswold Road	Charlotte
Richards	Rachel	310 Main Street	Greensboro
Tuttle	Briony	4300 Raleigh Road	Chapel Hill
Doherty	Colin	67 Hill Street	Wilmington

At the bottom of the dialog box are three buttons: "Back", "Next", and "Close".

- From the Data Format Selection dialog box, select the appropriate data formats (e.g., Phone, Date, and Century) and then click the **Next** button.



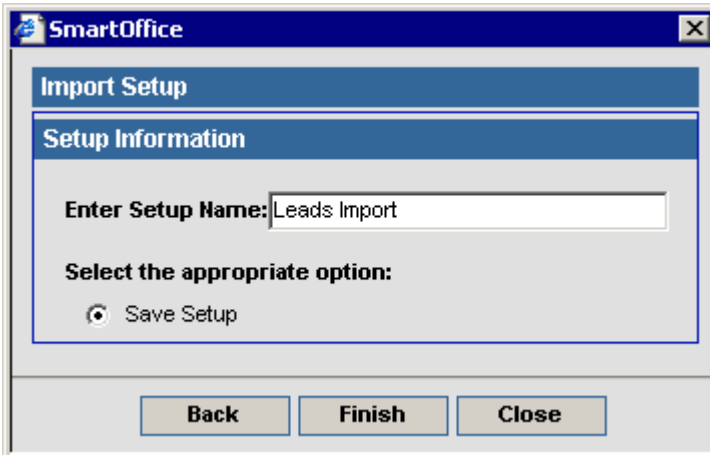
The dialog box titled "SmartOffice" contains a "Data Format Selection" window. It has three dropdown menus and one text input field:

- Phone Format: US Standard
- Date Format: mm/dd/yyyy
- Century: (empty text box)

Below the input fields is a note: "(i.e., enter 19 if you want the year to read 1983; enter 20 if you want the year to read 2003)". At the bottom of the dialog box are three buttons: "Back", "Next", and "Close".



6. In the Import Setup dialog box, the Save Setup option is automatically set. Enter the Setup Name, select the appropriate option and then click the **Finish** button.

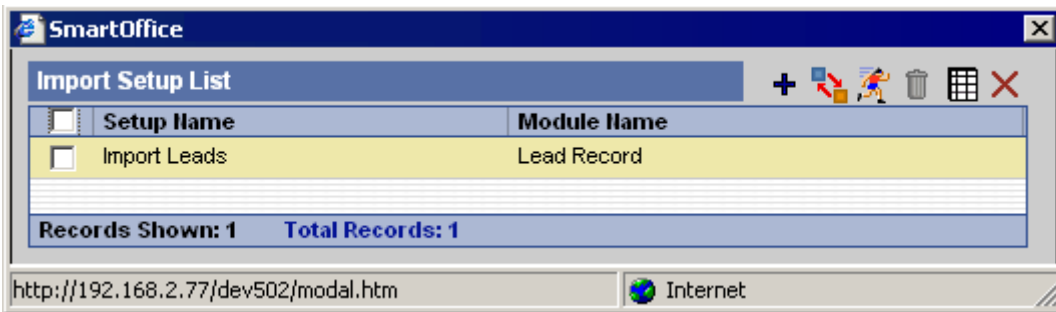


7. The newly created Setup is now listed on the Setup List.

## Run a Setup

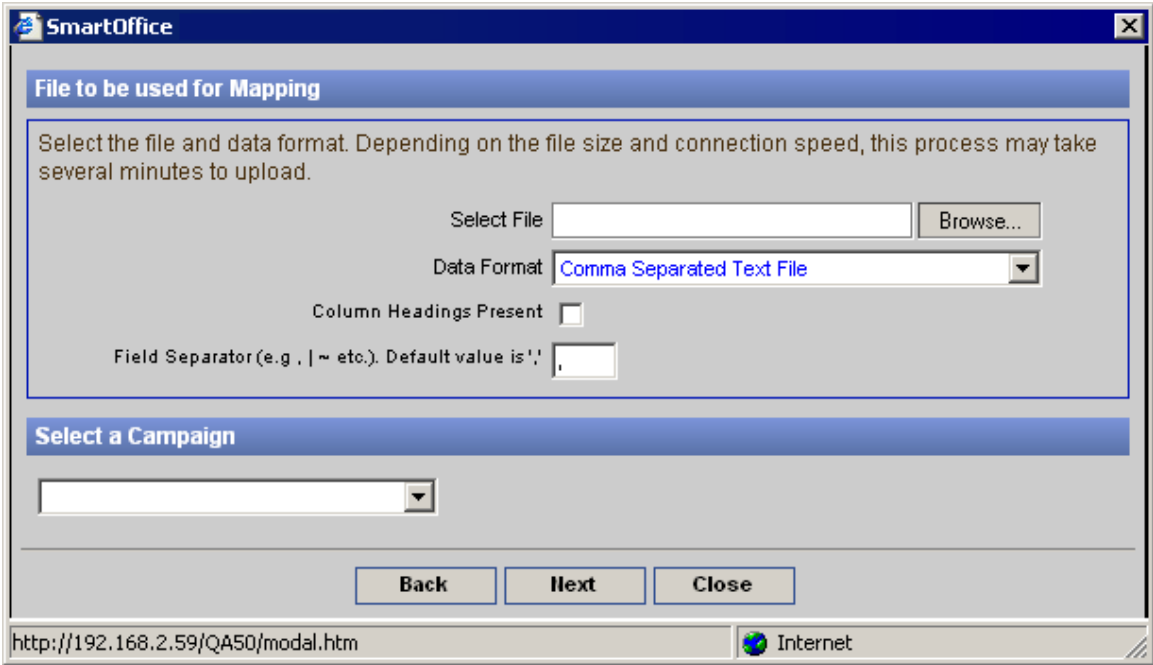
To run an existing Import Setup:

1. From the side menu, click **Leads Tracking** and then select **Import Leads** to open the Import Setup List dialog box.

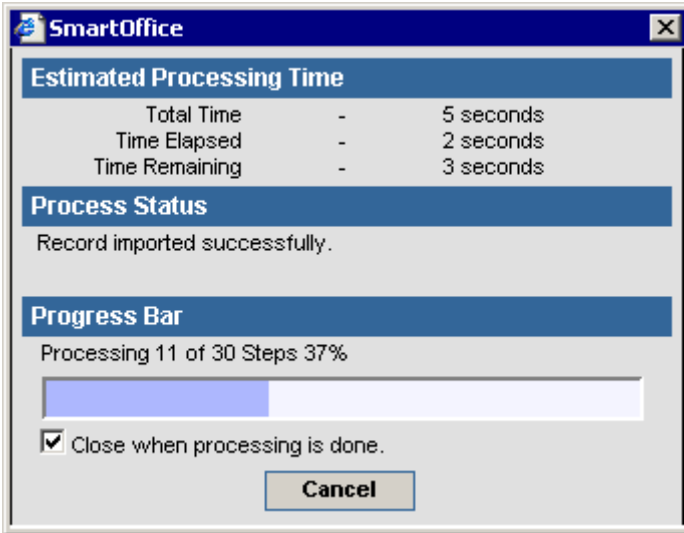


2. Select the appropriate Setup Name and then click the **Run Setup** button.

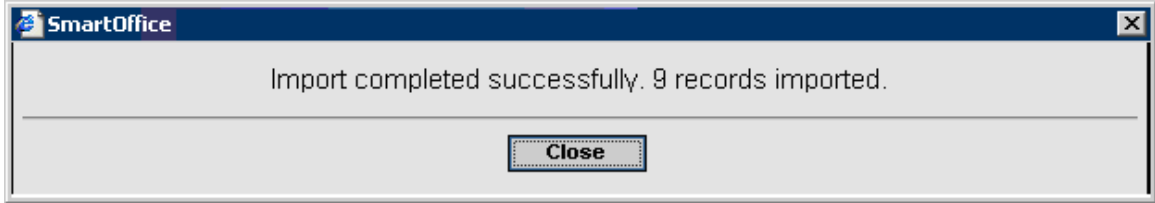
- From the File to be Used for Mapping dialog box, click the **Browse** button to select the file. After successfully locating the file, specify the proper Data Format, select the Campaign and then click the **Next** button.



- The next dialog box tracks the progress of the record import process.

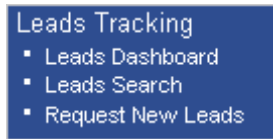


- When the import is complete, the following dialog box opens with a report of the number of records imported. Click the **Close** button to close the dialog box. For more information, see the *SmartOffice Import/Export* documentation.



## SmartLeads for Advisor Only User Role

From the SmartOffice side menu, click **Leads Tracking** to open an additional list of options in the Leads Tracking module. The following Leads Tracking options are available to Advisors.



## Summary Tab

The Leads Summary lists leads that have been assigned to the current user that have not been accepted.

**Unaccepted - Leads Summary - Phillip Anderson**

Lead Type: All Status: Unaccepted

Summary | Detail (P) | Additional Info. | Leads History | Documents | Custom

<input type="checkbox"/>	Lead Name	All Phones	Campaign	Status Date	Aging Since Last Status	Days in This Status
<b>Campaign - College Education Funding</b>						
<input type="checkbox"/>	Mrs. Marilyn A Albano	Residence : (928) 555-3111	College Education Funding	01/12/2006 09:39AM	Under 1 Week	0
<input type="checkbox"/>	Miss Joyce V Albano	Residence : (928) 555-3111	College Education Funding	01/12/2006 09:39AM	Under 1 Week	0
<input type="checkbox"/>	Mr. Ma. Victoria G Badinas	Residence : (928) 555-3555	College Education Funding	01/12/2006 09:39AM	Under 1 Week	0
<input type="checkbox"/>	Mr. Neil G Badinas	Residence : (928) 555-3555	College Education Funding	01/12/2006 09:39AM	Under 1 Week	0
<b>Subtotal: Campaign - College Education Funding (4)</b>						
<b>Records Shown: 4 Total Records: 4</b>						

## Unaccepted Summary Tab Buttons (Leads-specific)

- **Status:** To view leads grouped by status, select the appropriate status:
  - All
  - Unaccepted
  - Accepted – All
  - Accepted with Action
  - Accepted
  - First Contact Made
  - Sales Made
  - Sales Lost
  - Call Back
  - Do Not Call
  - Appointment Made
  - Not Interested
  - In the process of making a decision
  - Working with another competition
  - Already have it
  - Agreed to Keep in Touch
  - Other
  - Closed
- **Accept:** To accept assigned leads, tag the appropriate leads and then click this button.
- **Reject:** To reject assigned leads, tag the appropriate leads and then click the **Reject** button. The rejected leads are sent back to the Leads Coordinator or Leads Administrator and will be listed in the Unassigned Leads Summary when the Leads Coordinator next logs into SmartOffice. Once a lead is rejected, it can be accepted again by the same Advisor. A confirmation message displays before assigning the previously rejected Lead to the same Advisor.
- **Auto Accept Leads Using Record Matching:** To confirm if a lead already has a contact record in the application, click this button to open the Leads with Matches dialog box. Select a lead to view the matches. To merge to an existing Opportunity, click the **Merge Opportunity** button. To create a new Opportunity record, click the **Create Opportunity** button. The purpose of these functions is to avoid creation of duplicate Contact and Opportunity records.
- **Forward Leads:** Click this button to forward leads to another advisor within the same or in another office.
- **Show Leads For Proxy Users:** This feature enables the logged in advisor to view leads as a Proxy to other users. Click this button to display a list of users for whom the user is proxying. When a particular user is selected from the list, the view changes to reflect that user's leads. This button displays only when the user has few Proxying Users or has the Enterprise View turned On.
- **Notes:** After selecting the appropriate leads record, click this button to view, add or delete notes associated with the lead.

## Accepted Summary Tab Buttons (Leads-specific)

**Accepted - Leads Summary - Phillip Anderson**

Lead Type:  Status:

Summary | Detail (P) | Additional Info. | Leads History | Contact | Opportunity | Policy Summary | Documents | Custom

<input type="checkbox"/>	Lead Name	Campaign	Status Date	Days in This Status	Latest SmartPad Notes
<b>Campaign - College Education Funding</b>					
<input type="checkbox"/>	Miss Wenelyn V Afable	College Education Funding	12/21/2005 05:11PM	21	
<input type="checkbox"/>	Mrs. Marilyn A Albano	College Education Funding	12/21/2005 05:14PM	21	
Subtotal: Campaign - College Education Funding (2)					
<b>Campaign - Long Term Care</b>					
<input type="checkbox"/>	Miss. Victoria G Badinas	Long Term Care	12/28/2005 08:31AM	15	
<input type="checkbox"/>	Miss Rosailee Baylon	Long Term Care	12/21/2005 05:16PM	21	
<input type="checkbox"/>	Miss Helen L Cardoso	Long Term Care	07/06/2005 07:24AM	190	
<input type="checkbox"/>	Mr. Victoria G Claros	Long Term Care	12/21/2005 05:18PM	21	
Records Shown: 24 Total Records: 24					

- Reject:** To reject an accepted lead record, tag the appropriate lead and then click the **Reject** button. The rejected leads are sent back to the Leads Coordinator or Leads Administrator and will be listed in the Unassigned Leads Summary when the Leads Coordinator next logs into SmartOffice. Once a lead is rejected, it can be accepted again by the same Advisor. A confirmation message displays before assigning the previously rejected Lead to the same Advisor.
- Notes:** After selecting the appropriate leads record, click this button to view, add or delete notes associated with the lead.
- Status Update:** To update the status of a lead, click the **Status Update** button. When the Activity Outcome dialog box opens, select the appropriate status. The lead status will be updated with the selected status.

## Detail Tab

The Detail tab contains key information about the selected lead.

**Lead - Mr. Stephan Arms**

Summary | Detail (P) | Additional Info. | Leads History | Documents | Custom

<b>Personal Information</b> Last Name: <input type="text" value="Arms"/> Suffix: <input type="text"/> First Name: <input type="text" value="Stephan"/> Middle Name: <input type="text"/> Greeting: <input type="text"/> Title: <input type="text" value="Mr."/> Lead Type: <input type="text" value="Individual"/> Source: <input type="text"/> Sub-Source: <input type="text"/> Birth Date: <input type="text" value="07/10/1964"/> Age: <input type="text"/> Marital: <input type="text" value="Married"/> Gender: <input type="text" value="Male"/> Tobacco: <input type="text"/> Status: <input type="text" value="Created"/> Status Date: <input type="text" value="01/12/2006 09:04AM"/>		<b>Residence Address</b> Street: <input type="text" value="2274 W Olive Way"/> Line2: <input type="text" value="Apt 121"/> City: <input type="text" value="Chandler"/> State/ZIP Code: <input type="text" value="Az"/> <input type="text" value="85248-4184"/> Country: <input type="text"/>	
<b>Business Information</b> Employer: <input type="text"/> Occupation: <input type="text"/> Job Title: <input type="text"/> E-mail: <input type="text"/>		<b>Business Address</b> Street: <input type="text"/> Line2: <input type="text"/> City: <input type="text"/> State/ZIP Code: <input type="text"/> Country: <input type="text"/>	
<b>Needs</b> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		<b>Phone</b> Residence: <input type="text" value="928"/> <input type="text" value="555-1222"/> Business: <input type="text"/> <input type="text"/>	
		<b>Campaign Information</b> Campaign: <input type="text" value="College Education Funding"/> Media: <input type="text"/> Special Events: <input type="text"/>	

- **Last Name:** This mandatory field lists the lead's last name.
- **First Name:** The lead's first name.
- **Greeting:** The preferred name to use when addressing the lead.
- **Lead Type:** The Lead Type can be Individual, Business or Advisor.
- **Source:** The source of the lead (e.g., magazines, trade shows, brochures).
- **Birth Date:** The lead's date of birth. Click the **Calendar** button and select the appropriate date.
- **Marital:** This drop-down field lists the marital status of the lead.
- **Tobacco:** This field notes the lead's history of tobacco use.
- **Status:** The current stage of the lead. This field is automatically populated by the system.
- **Suffix:** The lead's name extension, if any.
- **Middle Name:** The lead's middle name.
- **Title:** The lead's title.
- **Sub-Source:** The sub-source of the lead, if applicable.
- **Age:** The lead's actual age.
- **Gender:** The field lists whether the lead is a male or female.
- **Status Date:** The date the status was last updated, which is automatically populated by SmartOffice.
- **Search:** To search the Lead, click the **Search** button.

#### **Business Information Section**

- **Employer:** The name of the lead's employer.
- **Occupation:** The occupation of the lead.
- **Job Title:** The lead's job title.
- **E-mail:** The lead's e-mail address.

#### **Needs Section**

These fields list the determined financial needs of the contact. Click the down-arrow at the end of each of these fields to select the appropriate product types.

#### **Residence Address Section**

- **Street:** The residence address of the lead. For example, Street or P.O. Box.
- **Line2:** The residence address of the lead. For example, Suite/Apartment number.
- **City:** The City where the lead resides.
- **State/Zip:** The State where the lead resides and the corresponding ZIP Code.
- **Country:** The Country where the lead resides.

#### **Business Address Section**

- **Street:** The business address of the lead. For example, Street or P.O. Box.
- **Line2:** The business address of the lead. For example, Suite/Apartment number.
- **City:** The City where the lead's business is located.
- **State/Zip:** The State where the lead's business is located and the corresponding ZIP Code.
- **Country:** The Country where the lead's business is located.

#### **Phone Section**

- **Residence:** The residence telephone number of the lead.
- **Business:** The business telephone number of the lead.


## Campaign Information Section




- **Campaign:** This field lists any campaign association. Click the field title hyperlink and type in the name of the campaign or click the **Search** button to view a list of existing campaigns. Select the appropriate campaign to associate it with the lead.
- **Media:** This field lists any media association. Click the field title hyperlink and type the name of the media or click the **Search** button to view a list of existing media. Select the appropriate media to associate it with the lead.
- **Special Events:** This field lists any special event association. Click the field title hyperlink and type the name of the special event or click the **Search** button to view a list of special events. Select the appropriate event to associate with the lead.

## Additional Info Tab

In the Additional Info tab, more information pertaining to the lead can be specified, such as the spouse's personal information, spouse's business information, tax ID, etc.

**Lead - Mr. Stephan Arms**



Summary	Detail (P)	Additional Info.	Leads History	Documents	Custom
<b>Spouse's Personal Information</b>			<b>Creation Details</b>		
Last Name <input type="text"/> Suffix <input type="text"/> First Name <input type="text"/> Middle Name <input type="text"/> Greeting <input type="text"/> Title <input type="text"/> Birth Date <input type="text"/>  Age <input type="text"/>			Created By Office <b>Joe</b> Created By <b>Mark Paladian</b> Created On <b>01/12/2006 09:04AM</b>		
<b>Spouse's Business Information</b>			<b>Other Information</b>		
Employer <input type="text"/> Occupation <input type="text"/> Job Title <input type="text"/> E-mail <input type="text"/>			Tax ID <input type="text"/> External ID <input type="text"/> Potential <input type="text"/> Score <input type="text"/> Leads Follow-up <input type="text"/> HO Client ID <input type="text"/> Nationality <input type="text"/> Language <input type="text"/> Priority Lead <input type="checkbox"/>		
<b>Remarks</b> <span style="float: right;">ABC </span>					
<input type="text"/>					
<b>Action</b> <span style="float: right;">ABC </span>					
<input type="text"/>					

### Spouse's Personal Information

- **Last Name:** The last name of the spouse.
- **First Name:** The first name of the spouse.
- **Greetings:** The preferred name to use when addressing the spouse.
- **Birth Date:** The spouse's date of birth. Click the **Calendar** button and select the date.
- **Suffix:** The name extension of the spouse.
- **Middle Name:** The middle name of the spouse.
- **Title:** The title of the spouse.
- **Age:** The actual age of the spouse.

### Spouse's Business Information

- **Employer:** The name of the spouse's employer.
- **Occupation:** The occupation of the spouse.
- **Job Title:** The job title of the spouse.
- **E-mail:** The lead's e-mail address.

### **Creation Details**

- **Created By Office:** The name of the office that created the lead.
- **Created By:** The name of the user that created the lead.
- **Created On:** The date and time when the lead was created.

### **Other Information**

- **Tax ID:** The social security number or taxpayer number.
- **Potential:** The estimated amount of sales.
- **Leads Follow-up:** The number of days before following the lead.
- **Nationality:** The citizenship of an Individual.
- **Priority Lead:** The priority of the lead.
- **External ID:** The code to identify the lead.
- **Score:** The score of the lead.
- **HO Client ID:** The Home Office Client ID.
- **Language:** The language that is spoken.

### **Remarks Section**

Use the Remarks section to provide further details about the lead.

### **Action Section**

Use the Action section to provide any action that needs to take place with the lead.

### **Leads History Tab**

The Leads History tab records the tracked activities associated with a lead. Whenever the status or stage changes, a note is added. Stages include: In Collection Center, In Data Cleaning Center, In Call Center, In Dissemination Center, In Agent Office and Dead Leads.

### **Documents Tab**

The Documents tab tracks all Documents that were sent for the lead.

### **Custom Tab**

The Custom tab stores custom data related to the lead.



## Leads Dashboard - Advisor

The Lead Dashboard provides users with reporting and analytical tools to view leads. From the side menu, click **Leads Tracking** and then select **Leads Dashboard** to open the Leads Dashboard Summary. Select any combination from the Report Selection Options and Leads Dashboard Options sections to display the appropriate lead information.

**Leads Dashboard**

Report Selection Options		Leads Dashboard Options	
Reporting Period	<input type="text"/>	<input checked="" type="radio"/> Assigned	<input type="radio"/> Revocable
Lead Type	All	<input type="radio"/> All Accepted	<input type="radio"/> All Leads
Campaign Name	<input type="text"/>	<input type="radio"/> Accepted and Action Taken	<input type="radio"/> Leads Success Ratio
Office Name	Joe	<input type="checkbox"/> Include Lead Status History	<input type="checkbox"/> Show Report as Tree Control
User Name	Phillip Anderson	<input type="button" value="Refresh"/>	

**Leads Summary - Assigned**

<input type="checkbox"/>	Lead Name	All Phones	Campaign	Status Date	Aging Since Last Status	Days in This Status
<b>Campaign - College Education Funding</b>						
<input type="checkbox"/>	Mrs. Marilyn A Albano	Residence : (928) 555-3111	College Education Funding	01/12/2006 09:39AM	Under 1 Week	0
<input type="checkbox"/>	Miss Joyce V Albano	Residence : (928) 555-3111	College Education Funding	01/12/2006 09:39AM	Under 1 Week	0
<input type="checkbox"/>	Mr. Ma. Victoria G Badinas	Residence : (928) 555-3555	College Education Funding	01/12/2006 09:39AM	Under 1 Week	0
<input type="checkbox"/>	Mr. Neil G Badinas	Residence : (928) 555-3555	College Education Funding	01/12/2006 09:39AM	Under 1 Week	0
<b>Subtotal: Campaign - College Education Funding (4)</b>						
Records Shown: 4    Total Records: 4						

### Report Selection Options

- **Status Date:** This drop-down field lists date intervals.
- **Campaign Name:**
  1. Click the **Campaign Name** hyperlink to open the Search Campaign dialog box.
  2. Click the **Search** button to display the Marketing Campaign list.
  3. Select the applicable **Campaign Name** hyperlink.
- **Office Name:** The Office Name is grayed out and defaults to the current logged office.
- **User Name:** The User Name is grayed out and defaults to the current logged user.

After the application information from the Report Selection Options section is selected, select the appropriate option from the Lead Dashboard Option section and then click the **Refresh** button to display the appropriate information on the Leads Summary.

## SmartLeads for Leads View User Role

The purpose of the Leads View role is to provide a simplified solution for users only interested in the basic features of Leads (e.g., accepting, rejecting and sending feedback). No additional licenses are needed such as Base System or the Opportunity module; however, these options are available should the user decide to upgrade.


The following is the basic side menu for the Leads View.

Leads Follow-Up
Contact
Leads Tracking
▪ Leads Dashboard
▪ Leads Search
User Setup

## Leads Follow-up

Thursday January 12, 2006

Date Ranges



Type	Status	Sub-Type	Mark Done	Contact Name	Full Phone	Subject/Reason	Latest SmartPad Notes	Acted On
<input type="checkbox"/> Call	Active	Initial	<input checked="" type="checkbox"/>	Arms, Stephan	(928) 555-1222	initial call		

Records Shown: 1 Total Records: 1

## SmartLeads for Leads Coordinator View User Role


The purpose of the Leads Coordinator View role is to provide a simplified solution for users only interested in the basic features of Leads (e.g., add, assign, forward, revoke). No additional licenses are needed such as Base System or the SmartOpportunities module; however, these options are available should the user decide to upgrade.

### Leads Follow-up

Select the **Leads Follow-up** menu item to display the Leads Follow-up information.

Thursday January 12, 2006

Date Ranges

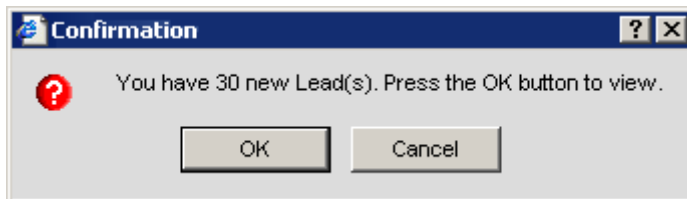


Type	Status	Sub-Type	Mark Done	Contact Name	Full Phone	Subject/Reason	Latest SmartPad Notes	Acted On
<input type="checkbox"/> Call	Active	Initial	<input checked="" type="checkbox"/>	Albano, Joyce V	(928) 555-3111	initial call		
<input type="checkbox"/> Call	Active	Initial	<input checked="" type="checkbox"/>	Arms, Stephan	(928) 555-1222	initial call		

Records Shown: 2 Total Records: 2

## Alerts from the Lead Tracking Module

The following is the login alert when a user has new leads.



### Leads Coordinator Alerts

When a Leads Coordinator user imports or adds new leads, the system opens a spreadsheet of leads that are ready to be assigned whenever he/she logs into the system. The Leads for Assignment spreadsheet contains several buttons that enable the Leads Coordinator to perform activities such as assigning leads, rejecting leads, adding leads, etc.

### E-mail Alerts to Advisor

To send an e-mail alert to an advisor of leads that have been assigned, click the **Send E-Mail to Advisor** button on the Summary. Note that this will only work for leads that have changed the current status to today. This feature will not work for lead statuses that are greater than one day old. Also, only one alert message can be sent to an advisor per day. For Setup, on the **User Preference – Basic Info** tab, enter the appropriate e-mail address under the Send Alert Notification to the Following E-mail Address field and then click the **Save** button.

## Advisor Alerts

When the Leads Coordinator of the Advisor Office assigns leads to an advisor, the system opens an Acceptance dialog box whenever the advisor logs into the system. The New Lead(s) for Assignment spreadsheet contains buttons enabling advisors to accept leads, reject leads, forward leads, etc.

## Existing Contacts

If a contact already exists in the system, the user can modify the Column Description to display the column called Contact Exists. This column will display a value of Yes if a contact record exists.

To view an existing contact record from the Leads Summary, select the appropriate contact name and then click the **Detail** tab. From the Detail tab, click the **Contact** tab. Additional tabs in this section include Opportunities and Policy Summary.

## Leads Revocation

If a lead is associated with a marketing campaign, the Leads Coordinator user can specify the period after which the lead can be revoked. This setting is called the Lead Revocation Period and is located on the Marketing Campaign record. The Advisor user does not have the right to define the revocation period.

1. From the side menu, click **Reporting/Marketing** and then select **Marketing Campaign**.
2. When the Campaign Search dialog box opens, click the **Search** button to display the Marketing Campaign Summary.
3. Select the appropriate Campaign Name and then click the **Detail** tab.
4. When the Detail tab is displayed, under the Additional Information section, the user can specify when the Lead should be revoked in the Lead Revocation Period field.  
**Note:** The Default value is 5 days. If the user does not enter any information, a dialog box with the following message opens, "Leads will not be revoked in this campaign."
5. The revoke date will start the lead for the following statuses:

- Accepted.
- Assigned.
- Forwarded.
- Appointment Made.
- Call Back.
- Do Not Call.
- Not Interested.
- In the Process of Making a Decision.
- Working with Another Competitor.
- Already have it.
- Agreed to Keep in Touch.
- Other.

The system will calculate the Status Date/Time and the Lead Revocation Period to determine when a lead should be revoked.

**Marketing Campaign - College Education Funding**

Summary | Detail (P) | Media/Special Events | Leads | Opportunities | Seminars | Documents

<b>Basic Information</b> Campaign Name: College Education Funding Start Date: 05/15/2005 Through Date: 12/15/2005 Active: Active Sponsored By: Joe Smith Campaign Budget: 25,000 Created By: Mark Paladian On: 11/17/2005		<b>Leads Distribution Parameters</b> Participation Option: All Advisors Use Demographic Rules for Leads Distribution: <input checked="" type="checkbox"/> Leaders Final Disposition Option: Reporting Period: Maximum Leads Assigned to Office per Reporting Period: % of Leads (in DataXchange Load) to be Assigned to this Office: Maximum Allowed Leads with 'No Action' in the Office: Maximum Leads Assigned to User per Reporting Period: % of Leads (Assigned to Office) to be Assigned to this User: Maximum Allowed Leads with 'No Action' Assigned to the User: Lead Revocation Warning Period (Hours): Lead Revocation Period: 5 Days					
<b>Remarks</b> <H> A A B I U T Initial Call for the College Education Funding Campaign		<b>Conditional Handling Options</b> <table border="1"> <thead> <tr> <th>Letter Title</th> <th>Word Track Title</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table>		Letter Title	Word Track Title		
Letter Title	Word Track Title						
<b>Default Handling Options</b> Handling Option: Handling Options Specified at Run-Time <input checked="" type="checkbox"/> Create Initial Activity Word Track: College Education Funding Activity Subject: Initial Call for the College Education Funding Campaign		<b>Activity Reason</b> Initial Call for the College Education Funding Campaign					
Send Initial Letter: College Education Funding <input checked="" type="checkbox"/> Use default letter printing options Opportunity Type: Corporate - 1 <input type="checkbox"/> Move Custom Data							

To view the dates when the leads will be revoked, modify the Lead Summary column description to display the Revoke On column. This column displays the date and time of when the lead will be automatically revoked.

**Unaccepted - Leads Summary - Mark Paladian**

Lead Type: All Status: Unaccepted

Summary | Detail (P) | Additional Info. | Leads History | Documents | Custom

Lead Name	All Phones	Campaign	Status Date	Days in This Status	Time Till Revoke
<b>Campaign - Long Term Care</b>					
<input type="checkbox"/> Charter Firm	Business : (818) 855-5555	Long Term Care	01/04/2006 10:28AM	7	Revocable
<input type="checkbox"/> Ms. Jenny Johnson	Residence : (626) 555-4444	Long Term Care	01/04/2006 01:46PM	7	Revocable
<input type="checkbox"/> Ms. Joyce V Smith	Residence : (626) 555-3111	Long Term Care	01/09/2006 10:15AM	3	1 Day(s) 23 Hour(s)
<input type="checkbox"/> Ms. Emily P Brown	Residence : (626) 555-3222	Long Term Care	01/09/2006 10:15AM	3	1 Day(s) 23 Hour(s)
<b>Subtotal: Campaign - Long Term Care (4)</b>					
<b>Records Shown: 4 Total Records: 4</b>					

## Moving Custom Data from Leads

If a lead is associated with a marketing campaign, the Leads Coordinator user can specify whether or not the custom data of leads needs to be converted to an Individual Contact/Business/Advisor. This Move Custom Data setting is accessed from the Marketing Campaign record.

1. Select **Marketing Campaign** from the expanded **Reporting/Marketing** menu.
2. From the Campaign Search dialog box, click the **Search** button to display the Marketing Campaign Summary.
3. Select the appropriate Campaign Name and then click the **Detail** tab.
4. When the Detail tab is displayed, select the **Move Custom Data** option to move the custom data after acceptance of the lead to an Individual Contact/Business/Advisor record.