The Right Technology, the Right Results

iLead Machine ™

User Guide

Version 4.0

Learning Services
Promero

Preface

This product guide is divided into chapters; each chapter describes a specific topic.

Certain typographical conventions are used throughout this product guide. See below:

- All commands you enter via keystrokes appear in bold (e.g., Press **Enter** or Press **Ctrl-I**).

- All text commands you enter into text boxes or other command line typing appear in italics (e.g., type *active*).

- All pull down menu options, figure references, and table references appear in italics in the menu order to select (i.e., Choose *File*> *Open*).

- There are three types of special text that are designed to reveal supplemental information: Note, Warning, and Caution. See below.

A **NOTE** provides additional, helpful information. This information may tell you how to do a certain task or just be a reminder for how-to's given in previous sections

A **WARNING** provides information about how to avoid harm to your system (i.e., do not delete your company).

A **CAUTION** provides information about how to avoid malfunction or unwanted Results (i.e., When using the IN logic always separate text with a single quote).

iLead Machine Conventions

The iLead Machine system requires you to enter information or select field entries from various field types. These field types are as follows:

Edit box: The edit box is a field which enables you to enter alphanumeric characters. The maximum number of digits/letters you can enter depends upon the field definition.

Figure 1 - Edit Box Sample

Radio button: Radio buttons enable you to click on the desired field entry from a list of choices. A checked radio button indicates the option is enabled; unchecked indicates the option is disabled.

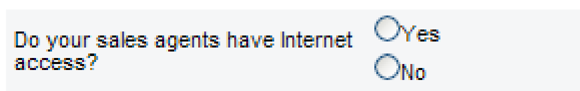


Figure 2 - Radio Button Sample

Drop down list box: The drop down list box is a list of entries displayed when you click on the arrow to the immediate right of the box. To select an entry, click on an empty item from the drop down list.

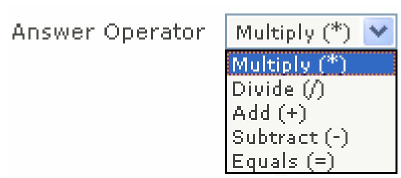


Figure 3 - Drop down List Box Sample

List box order: The list box order is a list of entries displayed that you may specify the order in which they will be displayed. To change the order click in the item in the list box and then click on the up or down arrow to the right of the list box to change the position of the text in the list box.

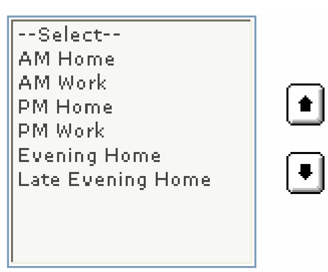


Figure 4 - List Box Order

Check box: Check boxes buttons enable you to click on the desired field entry. A checked box indicates the option is enabled; unchecked indicates the option is disabled.

Figure 5 - Checkbox Sample

Supplemental Page Button: A supplemental page button indicates that there is another page of controls or information for the labeled action. Pressing one time on the supplemental page button will open a new window where further controls and settings can be supplied.

Figure 6 - Supplemental Page Button

Actions

Buttons are “Pressed”

Links are “Clicked”

Items in lists are “Selected”

A “Range” of items in a list can be “Selected” by Selecting the first item then holding down the *Shift* key and using the *Up* or *Down Arrow* keys to select the range.

Multiple items in a list can be “Selected” by Selecting the first item then holding down the *CTRL* key and then using the mouse to select other items in the list.

Finding Help

For additional help, system help is available online. Just click on the **Help** button—available from each screen—and information about that screen will be displayed. The **Help** button is located on the right top of each page.

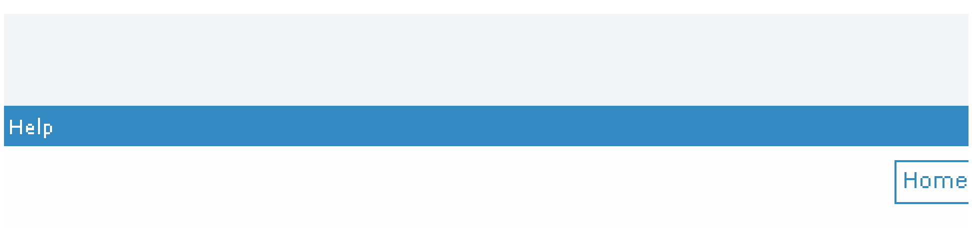


Figure 7 - Help Toolbar link

Definitions

Affiliate – Means the Promero clients or clients' customers, who will be provided with sales leads via the system.

CRUD – An acronym which means Create, Read, Update, Delete.

ILead Machine – Means the Promero system used to capture and distribute sales lead data.

ILead Machine Customer Portal– Means the Promero web site where affiliates can view sales lead data.

ILead Machine Administrative Portal– Means the Promero web site where administrators set up and maintain users, surveys, publishers, etc.

Lead Type – Means the classification of sales lead. Examples might be: Inbound Teleservices, Outbound Telemarketing, Mortgage Refinance, VA Loan, etc

Prospects – Means the visitor to a web site who fills out the survey e.g. submits an RFQ.

Pay in advance, renew allotment - The affiliate purchases an allotment of leads for a set price, by contract. When the number of leads remaining is 0, the affiliate must buy an additional allotment.

Pay in advance, Individual purchase - The affiliate purchases an allotment of leads for a set price, by contract. When the number of leads remaining is 0, the affiliate will purchase leads individually. These leads are purchased at a price based on lead value, which is set when a survey is created.

Pay end of month - The affiliate has an unlimited number of leads, based on filter criteria that will be automatically assigned to them. They are billed at a price based on the affiliate contract, with all leads billed at the same rate. Credit card, check, or Net 30 billing can be used for billing.

Pay end of month -The affiliate may purchase as many leads as they would like to, with no leads automatically assigned to them. They will be billed, through NetBilling, each time they wish to purchase a lead. They are billed at a price based on the affiliate contract, with all leads billed at the same rate.

Publisher - The publisher is an entity who will send Internet users to a survey e.g. Yahoo, Lending Tree or any other referral site or banner to a survey.

RFQ – Means a Request for Quote. This is a Sales Lead, which has not yet been assigned to an affiliate.

RFQ Type – See Lead Type.

Survey – Means the data that is filled into a web page by a Prospect. The survey data makes up a sales lead.

Sales Lead or Lead – See Survey

Table of Contents

Table of Images

Chapter 1: Overview

This chapter gives you a general overview of the iLead Machine Administrator, including feature descriptions and capabilities. You can also find information about the organization of this product guide.

Objectives

After completing this chapter you will be able to:

- ✓ Describe the iLead Machine
- ✓ Understand typical implementations of the iLead Machine
- ✓ Identify the separate modules of the iLead Machine

Description of the iLead Machine Product Line

The iLead Machine is a web-based application designed to dynamically generate survey forms, store all lead data, and distribute leads to appropriate recipients based on criteria you define.

All traffic to your survey forms is tracked so that hits and submitted leads can be tracked back to the source (publisher) – allowing you to report on the true ROI.

The iLead Machine includes several components. These modules will be outlined within this guide.

Typical Implementation

In most cases the iLead Machine is used to distribute fresh lead data via email, phone call or other means to a sales force or to a distribution channel such as distributors or as a pure lead marketing and deployment model.

Internal users find the iLead Machine's key value as being the intelligent routing of lead data to the best sales person in the best department and in a timeframe which improves closing ratios dramatically.

Companies who have distribution channels find the iLead Machine's key value as being the routing of lead data to the best dealer based on product knowledge, rating, partner level , geographic area or an even round robin unbiased lead allocation. Some clients find that they can sell excess lead inventory using the iLead Machine storefront to affiliates as a cross sell or a lead unrelated to the campaign.

Call Centers and telemarketing firms often find the largest benefit of the iLead Machine is that their telemarketing for "Widget A" may not qualify but the amazing business intelligence of the iLead Machine can actually sell the lead directly and in real-time to an unrelated campaign based on the question/answer combination filled in by the phone operator. This feature alone can turn unqualified (non-value) leads into qualified money making leads.

Modules and Capabilities

ILead Machine Administrative Portal

The iLead Machine Administrative Portal allows program administrators to set up, configure and maintain the system. This portal allows administrators to Create, Read, Update and Delete (CRUD): users, surveys, companies, affiliates, questions, storefronts, answers and publishers and other key components of the system.

In the Administrative Portal, the main top level entity is the “Company.” A company has all of the settings attributed to it and its affiliates, surveys, questions, answers, leads and publishers.

The iLead Machine can associate a “Child Company” to any company, subsidiary, division or client company to whom the main company wishes to re-sell the iLead Machine. The child can also have an unlimited number of children. This facilitates Promero clients in turn to also have their own clients using the iLead Machine, provided that proper licensing is maintained.

Note: When a child company is created, they will share in the allotments of Maximum Leads from the parent, thus it would not be advantageous for a parent company to give away all of its lead allotment to a child company.

ILead Machine Affiliate Portal

The iLead Machine Affiliate Portal allows customers to access their leads using a standard Internet browser. It is also the way for them to view their leads and track the progress of the sales process (e.g. status of each lead).

The Affiliate Portal accepts many different types of affiliate lead selection types ranging from a Pay-as-you-go to a prepaid account to a no fee internal sales force lead distributor.

Profile data (for the sales person or affiliate) are also maintained in the password protected portal.

Review and Exercises

Now that you have finished this chapter, you should be able to:

- ✓ Describe the iLead Machine
- ✓ Understand typical implementations of the iLead Machine
- ✓ Identify the separate modules of the iLead Machine

Exercises:

There are no exercises for this section.

Chapter 2: Accessing the iLead Machine

This chapter gives you a general overview of how to access the iLead Machine portal sites.

Objectives

After completing this chapter you will be able to:

- ✓ Log into the iLead Machine Administrative Portal
- ✓ Navigate the iLead Machine Administrative Portal
- ✓ Log into the iLead Machine Affiliate Portal
- ✓ Navigate the Affiliate Portal

The iLead Machine Administrative Portal

The iLead Machine Administrative Portal is your management site for all of your surveys, users, and leads in the iLead Machine. Since anyone with access to the Administrative Portal has full access to your leads and users it is a best practice to limit the number of Administrators you create in the iLead Machine.

The Administrative site is accessed over the Internet at a domain provided to you by Promero. This domain is given only to your company and provides a secure location for you to manage your iLead Machine. For the purposes of this manual, we will be using a Demo Company and accessing the site at http://demo.ileadmachine.promero.com/admin. When Promero sets up your deployment of the iLead Machine, you will be given your own sub-domain.

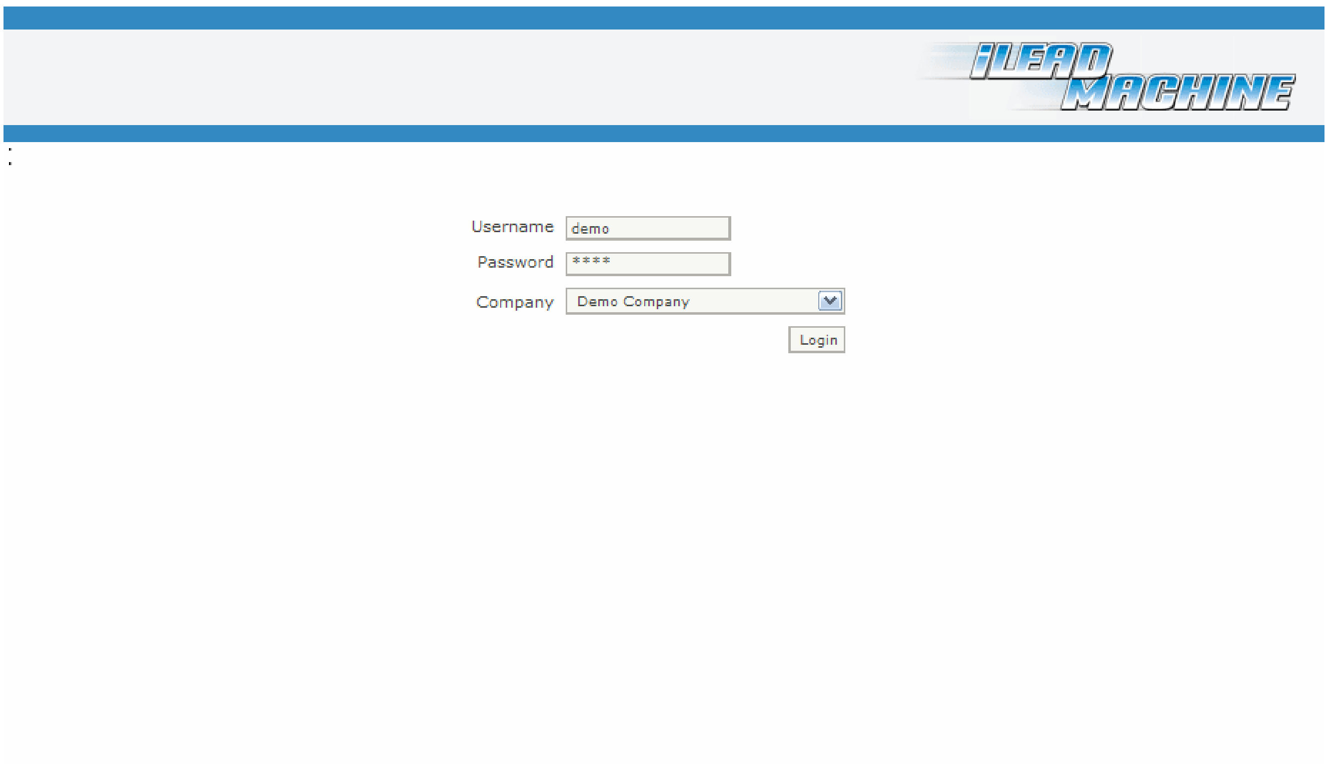


Figure 8 - The Administrative Portal

The Administrative Portal login screen requires you to enter a valid **username** and **password**. The password you enter is case-sensitive, although the username is not. A drop-down list box allows you to choose the **Company** that you would like to manage. Only your company and any child companies can be selected from this drop-down list box.

After you have entered your username and password, press the **Login** button.

Navigating the Administrative Portal

The main navigation tool for the Administrative Portal is a toolbar that extends across the width of the page. There are currently eight sections of the Navigation Bar. Some of these sections contain sub-menus that are displayed when you move your mouse over them. Each menu or sub-menu acts as a link to a page in the iLead Machine Administrative Portal.

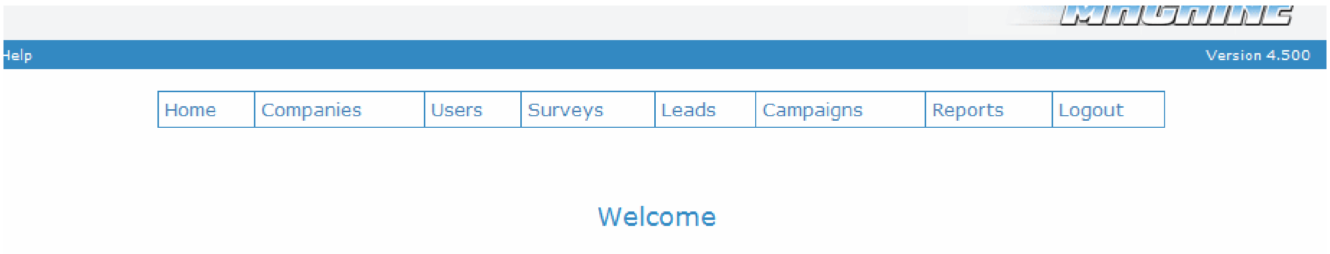
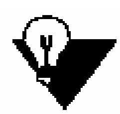
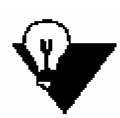


Figure 9 - Administrative Portal Toolbar

- Home - Returns you to the Welcome screen, seen when you first log in to the Administrative Portal
- Companies – Allows you to manage your company settings and any child companies
- Users – Allows you to manage users, including Administrators, Affiliates, and Publishers
- Surveys – Allows you to manage survey questions and answers and build online iLead Machine survey forms
- Leads – Allows you to manage your leads, both available and unassigned, as well as create new lead types and categories
- Campaigns – An Advanced Feature, the Campaigns section is not currently available.
- Reports – Allows you access to a number of reports on leads, affiliates, and publishers
- Logout – Logs you out of the iLead Machine Administrative Portal and returns you to the Login Screen.



NOTE: The iLead Machine is an evolving application and there will be some areas not discussed in this manual. These include unreleased features or additional add-on functionality that is not part of the standard iLead Machine Deployment.



NOTE: Almost every screen of the iLead Machine Administrative Portal contains a Help link in the upper left corner. Clicking the Help link opens a pop-up window with detailed Help information for the page you are currently viewing.

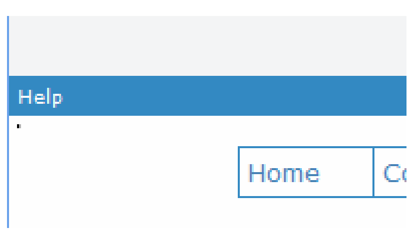


Figure 10 - Help link

The iLead Machine Affiliate Portal

The second portal site for the iLead Machine is the Affiliate Portal. It is at the portal where an affiliate can change their profile and view the leads they have received. The portal is also used for returning unwanted leads or tracking the current status of a lead.

The Affiliate Portal is accessed at the same URL as the Administrative Portal with one difference. In place of the "/admin" you will substitute "/portal" at the end of the URL. In our example, the URL would be http://demo.ileadmachine.promero.com/portal.

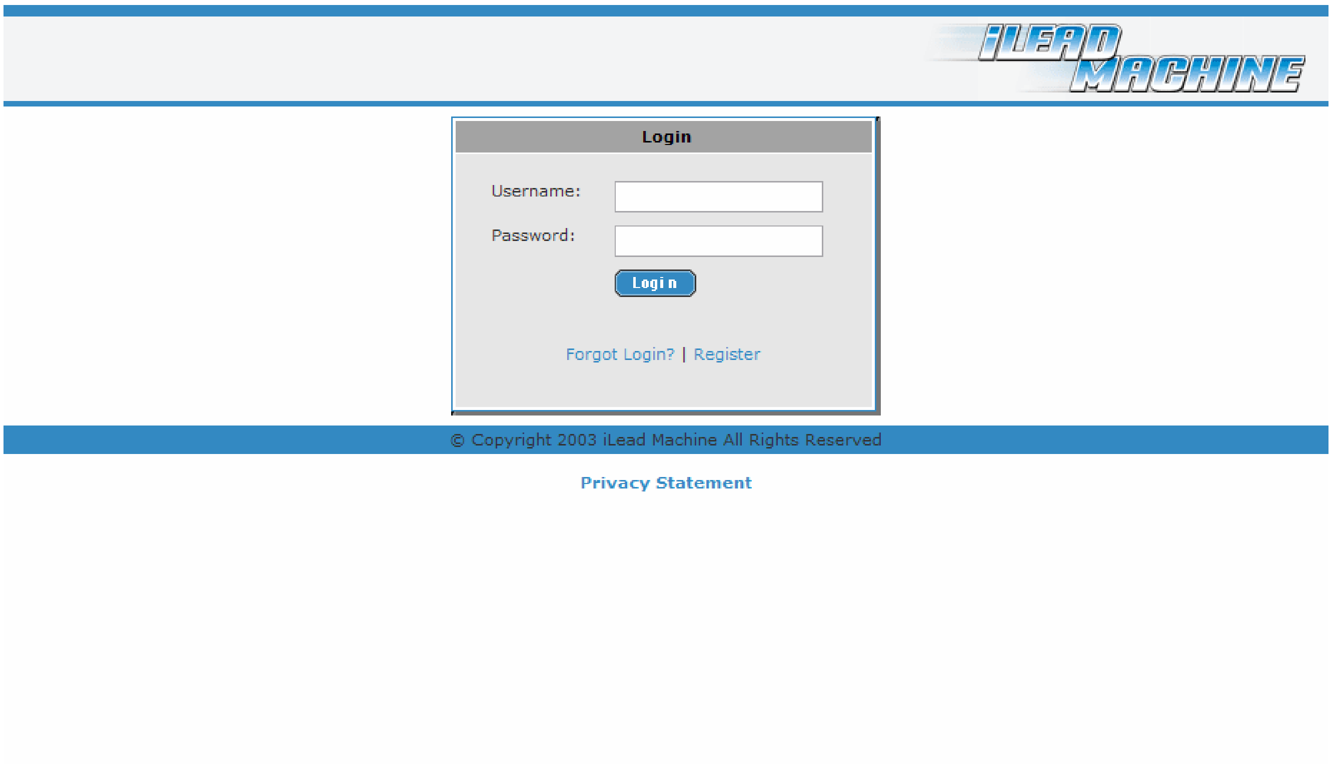


Figure 11 – The Affiliate Portal

Like the Administrative Portal, the Affiliate Portal requires both a **Username** and a **Password**. Only a non-deleted Affiliate Username for your company will grant access to the Affiliate Portal.

Beneath the Username and Password fields are two additional links. The first of these, Forgot Login will provide a way for an Affiliate who may have forgotten his password to have it sent to his main account email address. The Register link is an advanced feature and will not be covered.

Navigating the Affiliate Portal

Three important pieces of information can be found in the upper left corner as well. The First and Last Name of the Affiliate, the Affiliate Company name, and the current status of the Affiliate are displayed above the navigation links. These links allow you to change your profile, return to the main “Leads” screen and Logout of the Affiliate Portal. Changing an Affiliate Profile will be covered in a later section.

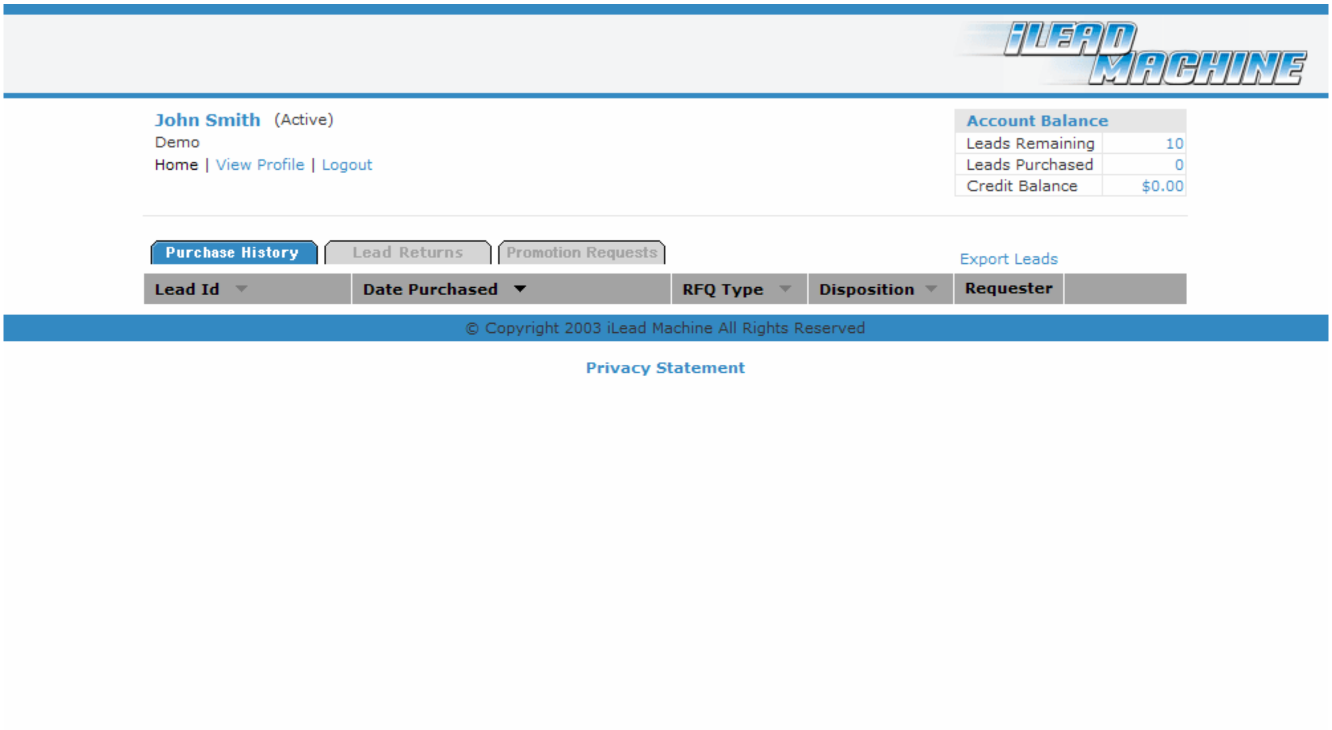


Figure 12 - The Affiliate Portal (Home Page)

The upper right corner displays the current Account Balance for the Affiliate. This includes the number of leads remaining, leads assigned (purchased), and any credit balance owed to the Affiliate.

The main section of the Affiliate Portal is a tabbed listing of the leads for this Affiliate. Three tabs allow the affiliate to display the current status of three types of leads:

- Purchase History – displays all leads currently assigned to the Affiliate with the date purchased and current Disposition
- Lead Returns – displays all lead return requests by the Affiliate with the current status of the request
- Promotion Requests – displays all Promotion requests by the Affiliate on behalf of his customers with the current status of the request

Full use of the Affiliate Portal will be covered in a later section of the manual.

Review and Exercises

Now that you have finished this chapter, you should be able to:

- ✓ Log into the iLead Machine Administrative Portal
- ✓ Navigate the iLead Machine Administrative Portal
- ✓ Log into the iLead Machine Affiliate Portal
- ✓ Navigate the Affiliate Portal

Exercises:

With the URL and login information provided to you by your Project Manager at Promero, log into the Administrative Portal and Affiliate Portal sites for your company's iLead Machine Deployment. Make a note of the sub-menus in the Administrative Portal Navigation Bar and take a look around the site.

Chapter 3: iLead Machine Users

This chapter covers the three user types of the iLead Machine – Administrators, Publishers, and Affiliates

Objectives

After completing this chapter you will be able to:

- ✓ Create an iLead Machine Administrator
- ✓ Create an iLead Machine Publisher
- ✓ Create an iLead Machine Affiliate

Administrators

An Administrator of the iLead Machine is able to log into the iLead Machine Administrative Portal Site to manage other users of the iLead Machine, create surveys, manage leads, and view reports. Since an Administrator has full access to your entire Company within the iLead Machine, it is recommended that you limit the number of administrators to only those who need the access.

NOTE: All changes made by an Administrator are tracked in the master iLead Machine database. Access to this database is limited to Promero Database Administrators and IT Staff.

MANAGING ADMINISTRATOR USERS

The **Manage Administrators** page is accessed through the *Users>Administrators>Manage Administrators* menu from the Navigation Bar.

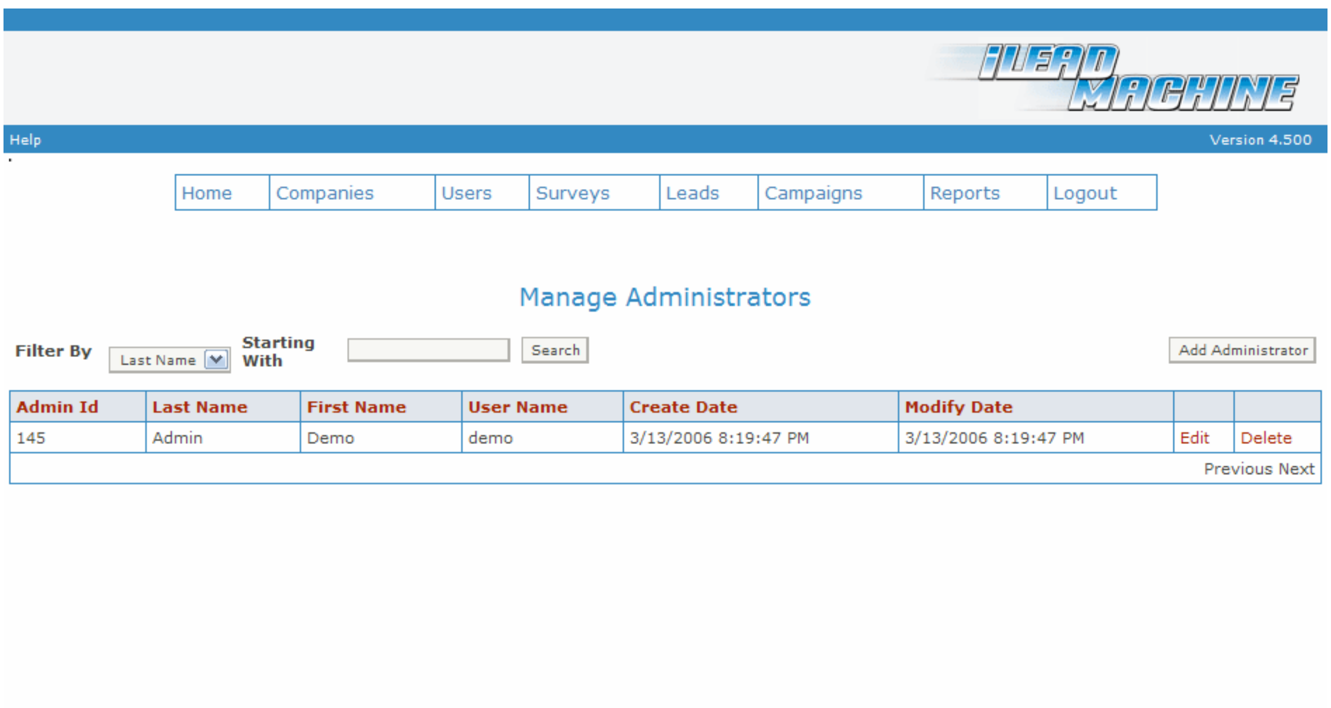


Figure 13 - Manage Administrators

The current list of Administrators is displayed with a default sort order on the Last Name column. Clicking any of the Column header links changes the display to sort by that column. Clicking on the same Column header link inverts the sort order on the same column.

You can also use the **Filter By** drop-down list box to limit the display to records matching selected criteria. The available options for this page are:

- Last Name
- First Name

- User Name

ADDING A NEW ADMINISTRATOR USER

Press the **Add Administrator** button to display the **Edit Administrator** page. This page is used not only to edit an existing Administrator but also to create a new one.

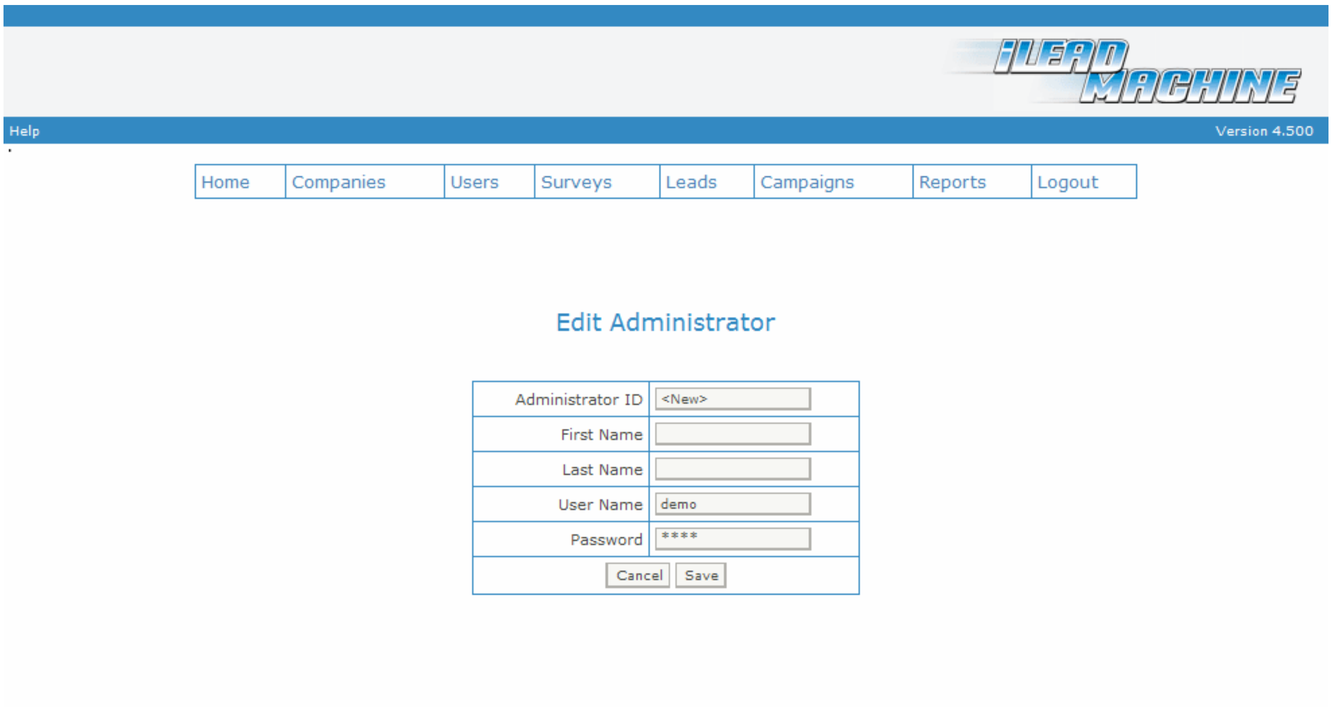


Figure 14 - Adding an Administrator

Most pages in the iLead Machine Administrative Portal display an “ID” field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are creating a new Administrator this field will display “<New>”.

There are four required fields for creating a new Administrator user:

- First Name – enter the first name of the Administrator as you would like it to be displayed
- Last Name – enter the last name of the Administrator as you would like it to be displayed
- User Name – enter the username the Administrator will use to log into the Administrative Portal. The username is not case-sensitive, but must be unique within your iLead Machine Company.
- Password – enter the password the Administrator will use to log into the Administrative Portal. The password is case-sensitive but has no other requirements (e.g. special characters, length)

Once you have completed all required fields, press the **Save** button. The Administrator user will be created in the iLead Machine database and you will be returned to the **Manage Administrators** page.

If you press **Cancel**, any information you entered will not be saved and you will be returned to the **Manage Administrators** page without the Administrator user being created.

EDITING AN ADMINISTRATOR USER

Clicking on the Edit link in the Administrators table on the **Manage Administrators** page navigates to the **Edit Administrators** page for the user in that row.

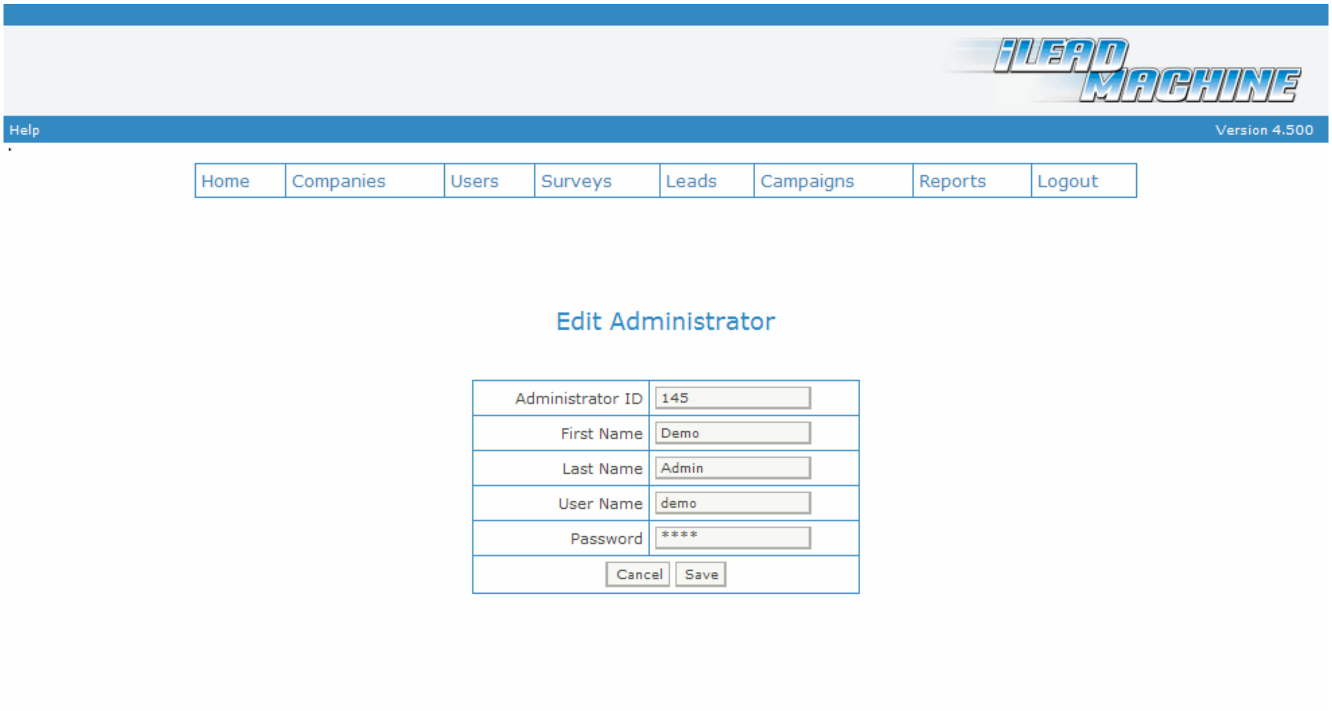


Figure 15 - Edit Administrator

From here you can change any information (with the exception of the Administrator ID, which is a read-only field) for this Administrator User. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and you will be returned to the **Manage Administrators** page.

If you press **Cancel**, any changes you made will not be saved and you will be returned to the **Manage Administrators** page without the Administrator user being modified.

DELETING AN ADMINISTRATOR USER

Clicking on the Delete link in the Administrators table on the **Manage Administrators** page deletes the Administrator user in that row. You will be prompted with a confirmation page to verify that you wish to delete this user.

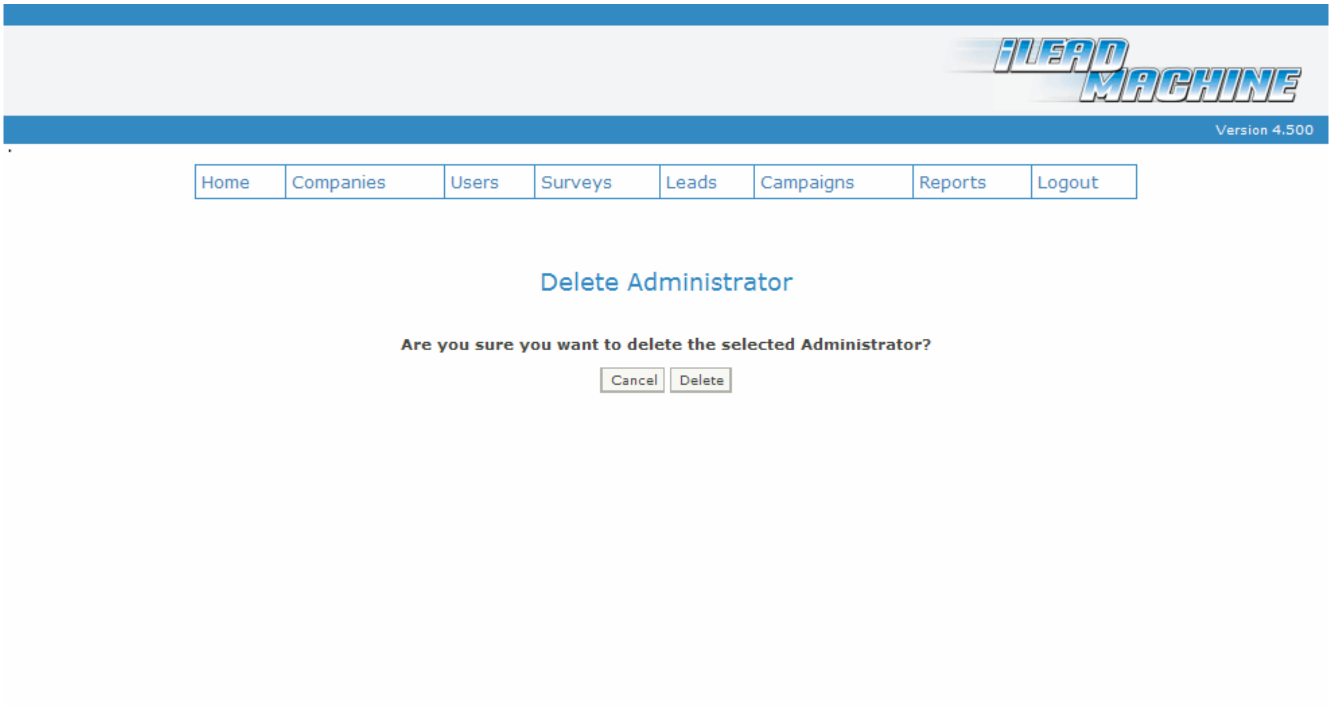


Figure 16 - Deleting an Administrator

WARNING: When your Company is first set up by your Project Manager at Promero, a single Administrator user will be created for you. Do not delete this user before creating at least one additional user. This will prevent you from accessing the Administrative Portal site.

If you wish to delete the Administrator user press the **Save** button. The user will be deleted from the iLead Machine database and you will be returned to the **Manage Administrators** page.

If you press **Cancel** you will be returned to the **Manage Administrators** page without the Administrator user being deleted.

Publishers

A Publisher in the iLead Machine is another name for a referrer or source of a lead. Depending on your business model, a publisher could be a web site, a search engine, a banner advertisement, or even a call center agent.

NOTE: All changes made by an Administrator are tracked in the master iLead Machine database. Access to this database is limited to Promero Database Administrators and IT Staff.

NOTE: Publisher users contain a number of advanced and unreleased features. These fields will be omitted from this manual.

Managing Publisher Users

The **Manage Publishers** page is accessed through the *Users>Publishers>Manage Publishers* menu from the Navigation Bar.

Figure 17 - Manage Publishers

The current list of Publishers is displayed with a default sort order on the Publisher Name column. Clicking any of the Column header links changes the display to sort by that column. Clicking on the same Column header link inverts the sort order on the same column.

You can also use the **Filter By** drop-down list box to limit the display to records matching selected criteria. The available options for this page are:

- Publisher Name
- User Name

ADDING A NEW PUBLISHER USER

Press the **Add Publisher** button to display the **Edit Publisher** page. This page is used not only to edit an existing Publisher but also to create a new one.

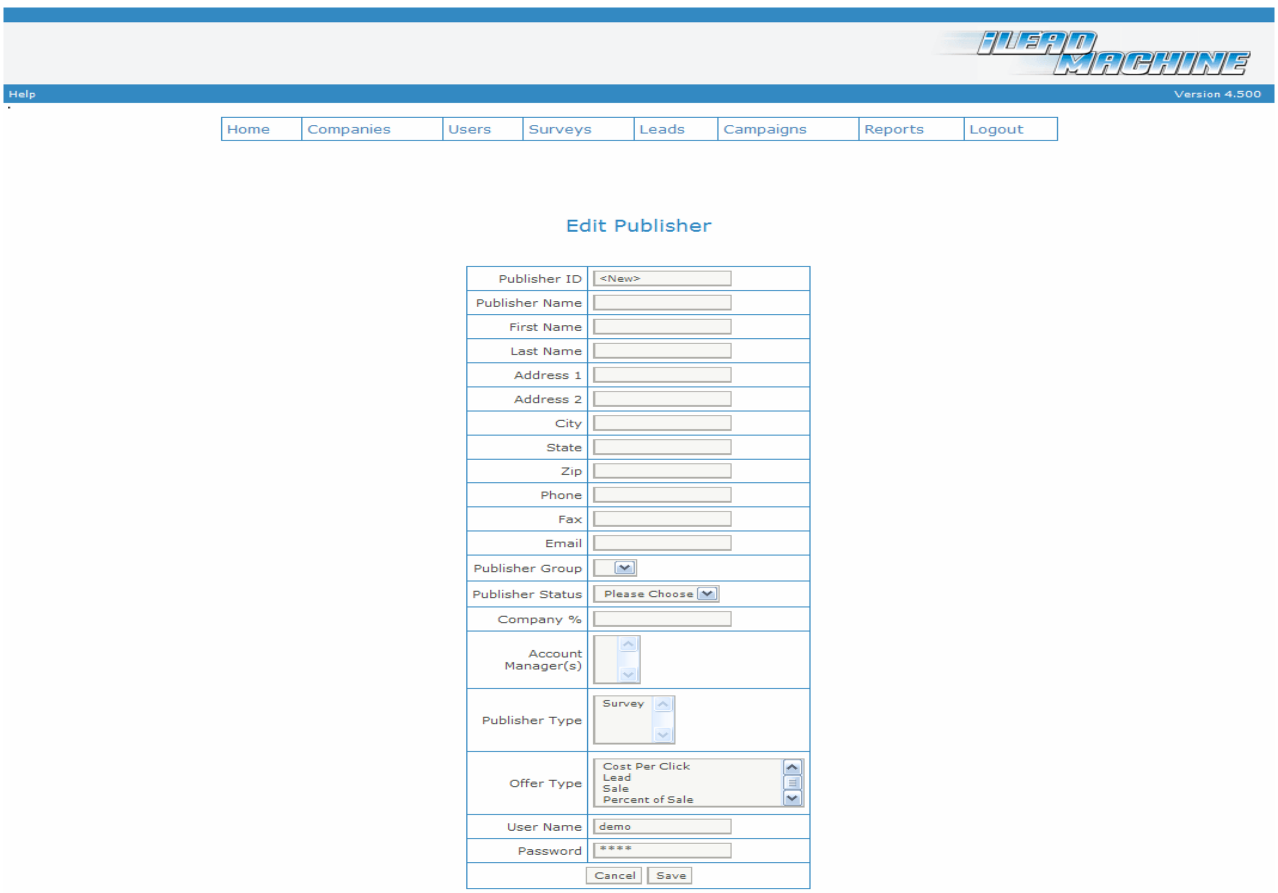


Figure 18 - Adding a Publisher

Most pages in the iLead Machine Administrative Portal display an “ID” field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are creating a new Publisher this field will display “<New>”.

There are a number of required fields for creating a new Publisher user. Any non-required fields are identified below.

- Publisher Name – enter the name of the Publisher as you would like it to be displayed on reports and in the Administrative Portal
- First Name – enter the first name of the Publisher as you would like it to be displayed
- Last Name – enter the last name of the Publisher as you would like it to be displayed
- Address 1 – enter the first line of the Publisher's mailing address.
- Address 2 – enter the second line of the Publisher's mailing address (optional)
- City – enter the City name of the Publisher's mailing address
- State – enter the State of the Publisher's mailing address
- Zip Code – enter the Zip Code of the Publisher's mailing address
- Phone – enter the Phone number of the Publisher
- Fax – enter the Fax Number of the Publisher (optional)
- Email – enter the Email Address of the Publisher
- Publisher Group – Publisher Groups are a future feature of the iLead Machine.
- Publisher Status – Select the Status of the Publisher user. Statuses include:
  - Prospect – identifies that the Publisher user is a prospective lead referrer but will not credit the publisher for any leads referred
  - Active – identifies that the Publisher user is an active lead referrer and will be credited for any leads referred
  - Suspended – identifies that the Publisher user is no longer an active lead referrer and will not be credited for any leads referred
  - Terminated – identifies that the Publisher user is no longer a valid lead referrer and will not be credited for any leads referred

NOTE: While it seems repetitive that a Publisher user has three statuses that essentially mean that they are not a valid lead referrer; the different statuses are tied into future functionality of the iLead Machine.

- Company % - enter the percentage of the Publisher payout (per lead) that is kept by your company

NOTE: Company % and payout refers to a future feature of the iLead Machine. At this time you should enter **0** in this field.

- Account Manager(s) – Account Managers are a future feature of the iLead Machine.
- Publisher Type – Select the type of leads for which the Publisher can be credited. Presently a publisher can only refer leads to iLead Machine survey forms.
- Offer Type – Offer Types are a future feature of the iLead Machine.
- User Name – enter the username the Publisher will use to log into the Publisher Portal. The username is not case-sensitive, but must be unique within your iLead Machine Company. The Publisher Portal is a future feature of the iLead Machine.
- Password – enter the password the Administrator will use to log into the Administrative Portal. The password is case-sensitive but has no other requirements (e.g. special characters, length). The Publisher Portal is a future feature of the iLead Machine.

EDITING A PUBLISHER USER

Clicking on the Edit link in the Publishers table on the **Manage Publishers** page navigates to the **Edit Publishers** page for the user in that row. Some additional options are now available on the **Edit Publishers** page.

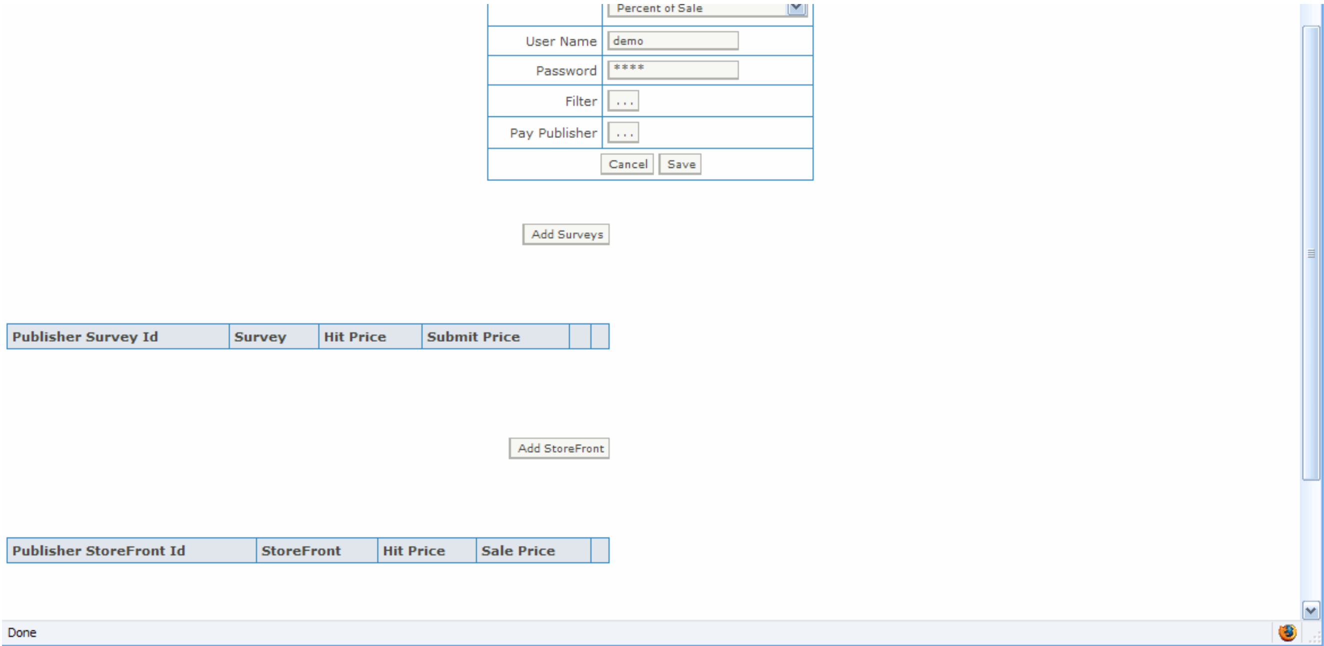


Figure 19 - Additional Publisher Options

These additional options include:

- Filter – press the supplemental page button to create or edit the filter for this publisher. Filters will be covered later in the manual.
- Pay Publisher – Pay Publisher is a future feature of the iLead Machine.
- Add Surveys – press the Add Surveys button to set the payout pricing for clicks and leads referred by this publisher. This will be covered later in the manual.
- Add Storefronts – Add Storefronts is a future feature of the iLead Machine.

From here you can change any information (with the exception of the Publisher ID, which is a read-only field) for this Publisher User. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and you will be returned to the **Manage Publishers** page.

If you press **Cancel**, any changes you made will not be saved and you will be returned to the **Manage Publishers** page without the Publisher user being modified.

DELETING A PUBLISHER USER

Clicking on the Delete link in the Publishers table on the **Manage Publishers** page deletes the Publisher user in that row. You will be prompted with a confirmation page to verify that you wish to delete this user.

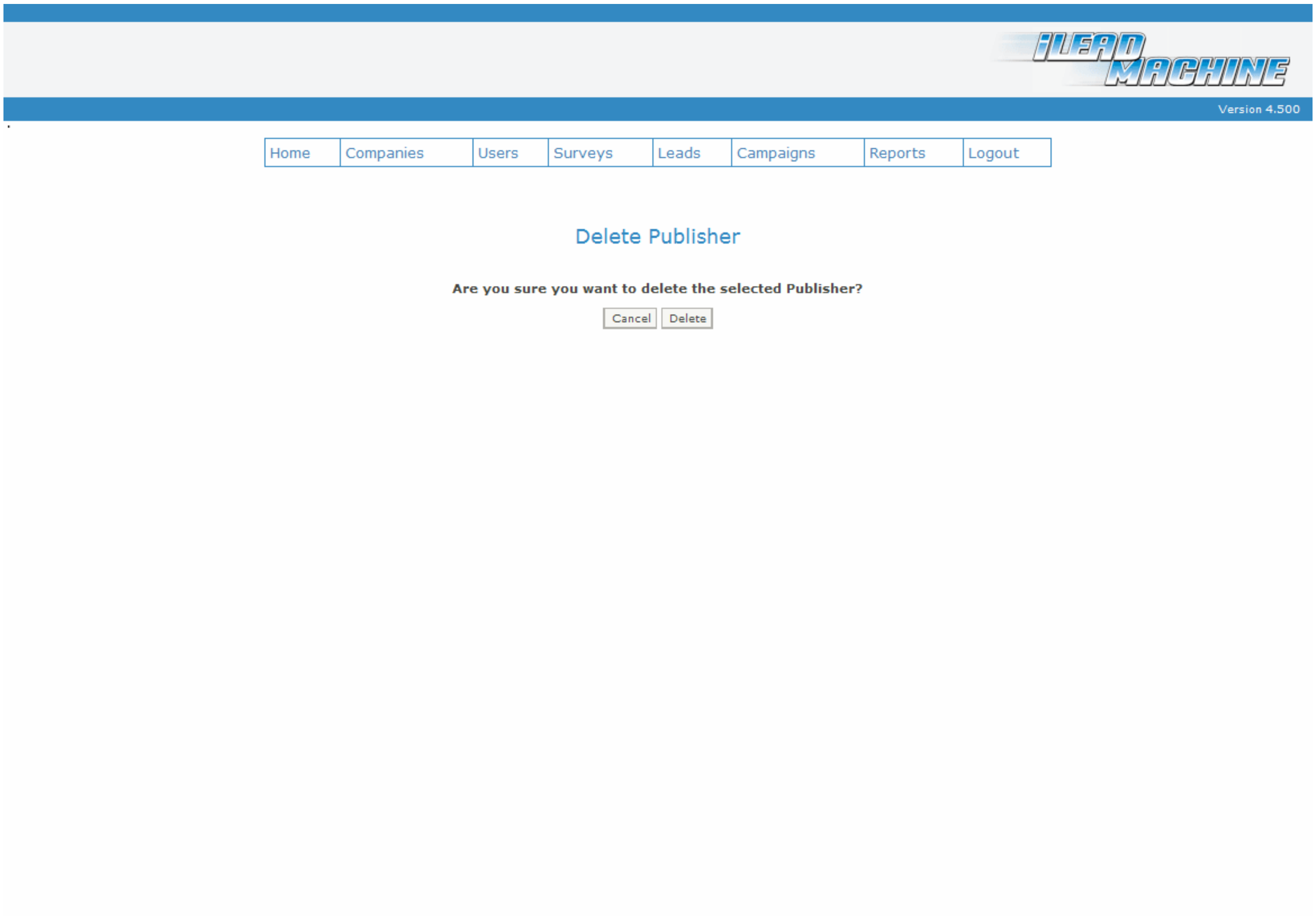


Figure 20 - Deleting a Publisher

Affiliates

An Affiliate in the iLead Machine is another name for a lead recipient. Depending on your business model, an affiliate can be an internal employee, a franchise, or a customer.

NOTE: All changes made by an Administrator are tracked in the master iLead Machine database. Access to this database is limited to Promero Database Administrators and IT Staff.

NOTE: Affiliate users contain a number of advanced and unreleased features. These fields will be omitted from this manual.

MANAGING AFFILIATE USERS

The **Manage Affiliates** page is accessed through the *Users>Affiliates>Manage Affiliates* menu from the Navigation Bar.

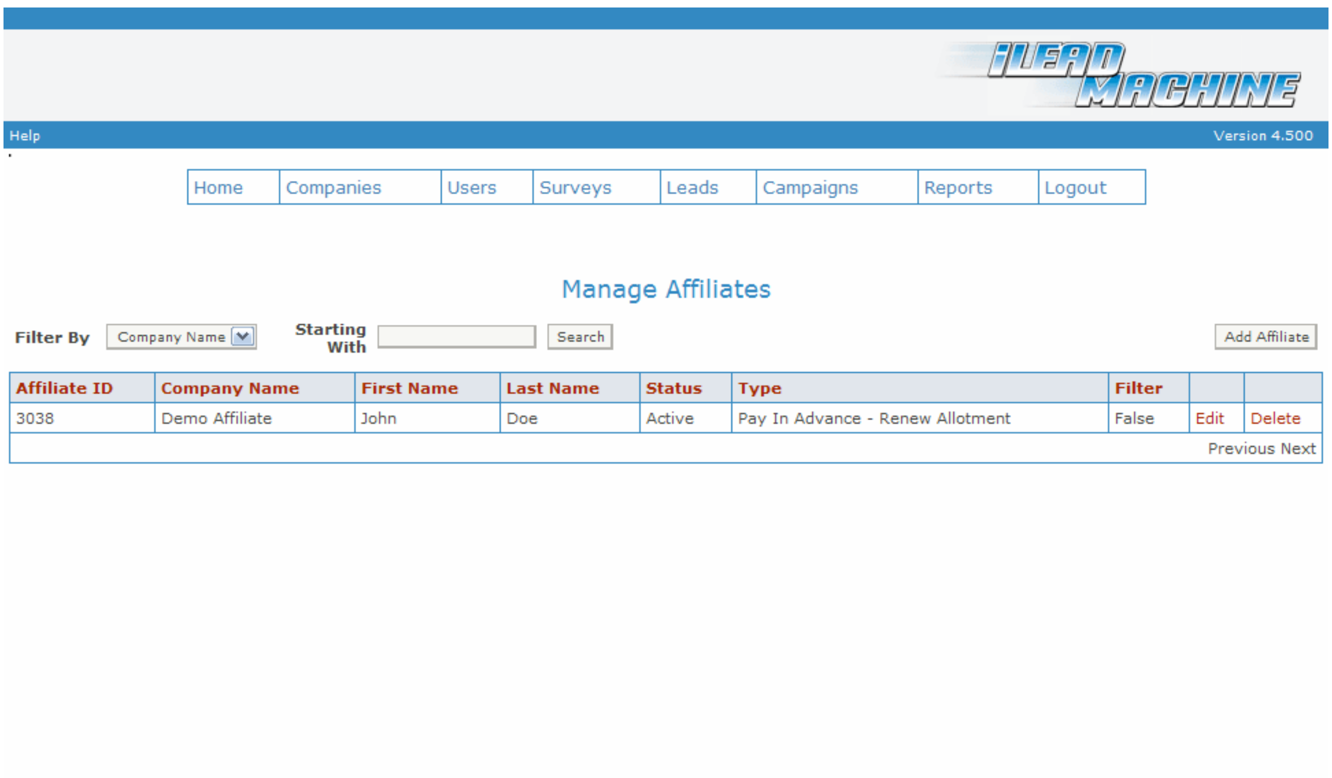


Figure 21 - Manage Affiliates

The current list of Affiliates is displayed with a default sort order on the Affiliate Name column. Clicking any of the Column header links changes the display to sort by that column. Clicking on the same Column header link inverts the sort order on the same column.

You can also use the **Filter By** drop-down list box to limit the display to records matching selected criteria. The available options for this page are:

- Company Name
- First Name
- Last Name

ADDING A NEW AFFILIATE USER

Press the **Add Affiliate** button to display the **Edit Affiliate** page. This page is used not only to edit an existing Publisher but also to create a new one.

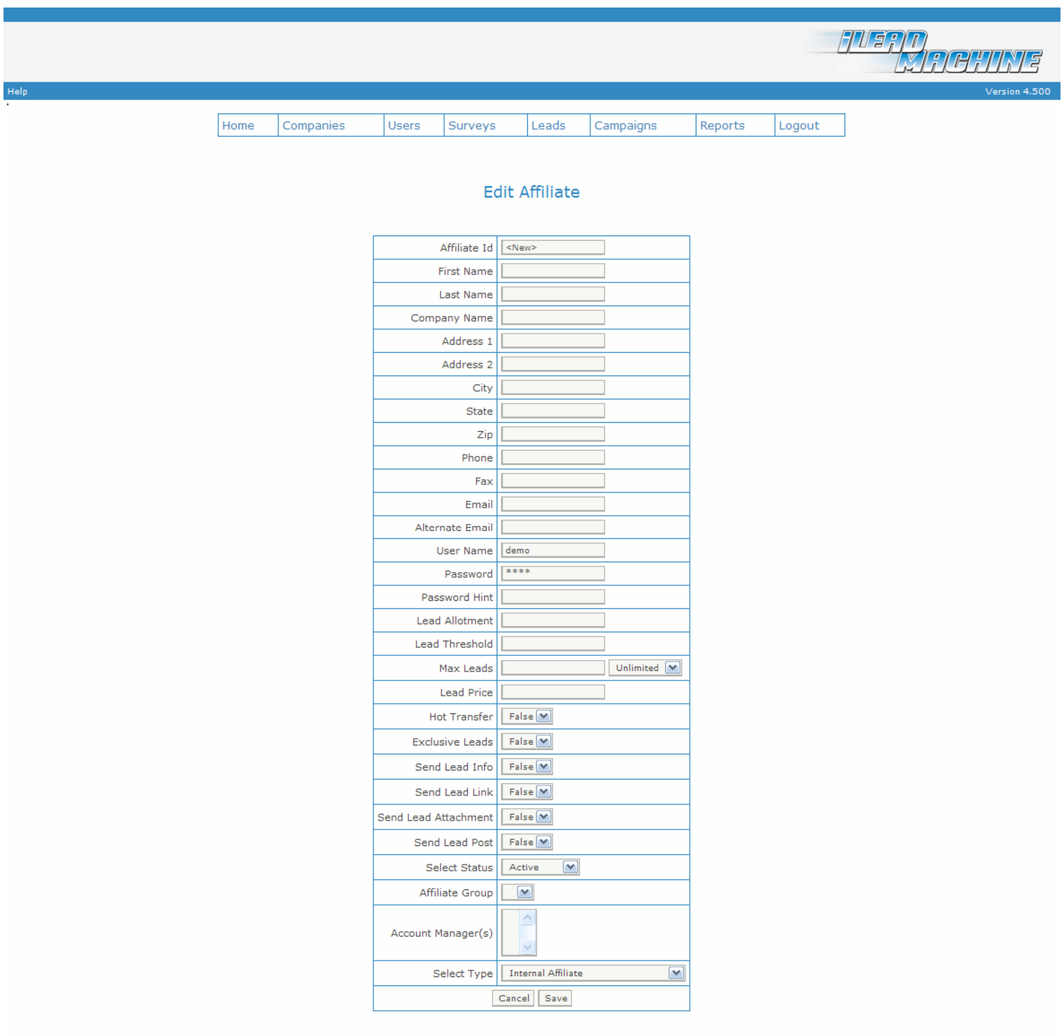


Figure 22 - Adding an Affiliate

Most pages in the iLead Machine Administrative Portal display an “ID” field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are creating a new Affiliate this field will display “<New>”.

There are a number of required fields for creating a new Affiliate user. Any non-required fields are identified below.

- First Name – enter the first name of the Affiliate as you would like it to be displayed
- Last Name – enter the last name of the Affiliate as you would like it to be displayed
- Company Name – enter the name of the Affiliate Company
- Address 1 – enter the first line of the Affiliate mailing address.
- Address 2 – enter the second line of the Affiliate's mailing address (optional)
- City – enter the City name of the Affiliate's mailing address
- State – enter the State of the Affiliate's mailing address
- Zip Code – enter the Zip Code of the Affiliate's mailing address
- Phone – enter the Phone number of the Affiliate
- Fax – enter the Fax Number of the Affiliate (optional)
- Email – enter the Email Address of the Affiliate. This is the email address to which leads and other emails will be sent.
- Alternate Email – this field is used to store a second email address for the Affiliate. This email address is stored for informational purposes only (optional)
- User Name – enter the username the Affiliate will use to log into the Affiliate Portal. The username is not case-sensitive, but must be unique within your iLead Machine Company.
- Password – enter the password the Administrator will use to log into the Administrative Portal. The password is case-sensitive but has no other requirements (e.g. special characters, length).
- Password Hint – enter an hint to be used as a reminder if the Affiliate forgets his password (optional)

The next group of fields deals with the number of leads allowed for the affiliate. This functionality will be covered in more detail later.

- Lead Allotment – enter the number of leads normally purchased by this affiliate (if the affiliate normally purchases leads in an allotment block) (optional)
- Lead Threshold – enter a threshold number for notifying the Affiliate that his allotment is running out (optional)
- Max Leads – enter a limit to the number of leads the Affiliate can receive in a given time period. Use the drop-down list box to select from the following intervals:
    - Unlimited (no limit will be set for lead assignment)
    - Day
    - Week (7 days)
    - Month (30 days)
    - Year (365 days)
- Lead Price – enter the cost per lead for this Affiliate (based on your agreement with the Affiliate)

The next group of fields deals with the delivery methods for leads to this affiliate. This functionality will be covered in more detail later.

- Hot Transfer – indicates that the Affiliate receives “Hot Transfer” Leads from a Call Center environment.
- Exclusive Leads – indicates that the Affiliate receives exclusive leads that will not be available to other affiliates
- Send Lead Info – indicates that the Affiliate receives an email containing the information contained in each lead
- Send Lead Link – indicates that the Affiliate receives an email notification that a new lead has been assigned with a link to the Affiliate Portal site.
- Send Lead Attachment – indicates that the Affiliate receives an email with a .csv attachment containing the lead information for each lead
- Send Lead Post – indicates that the Affiliate receives an HTTP post containing the data for each lead. HTTP post leads are a future feature of the iLead Machine.

- Affiliate Status – Select the Status of the Affiliate user. Statuses include:
    - Prospect – identifies that the Affiliate user can log into the Affiliate portal site but will not receive leads
    - Active – identifies that the Affiliate user can log into the Affiliate portal and will receive leads that match his filter criteria
    - Suspended – identifies that the Affiliate user can log into the Affiliate portal site but will not receive leads
    - Terminated – identifies that the Affiliate user is no longer a valid lead recipient and cannot log into the Affiliate Portal

NOTE: While it seems repetitive that an Affiliate user has two statuses that essentially mean that will not receive leads; the different statuses are tied into future functionality of the iLead Machine.

- Affiliate Group – Indicates that this Affiliate user is a member of an Affiliate Group. Affiliate Groups are a future feature of the iLead Machine.
- Account Manager(s) – Account Managers are a future feature of the iLead Machine.
- Select Type – Indicates the method for purchasing and assigning leads for this affiliate. Current options include:
    - Internal User – identifies that the Affiliate is an internal employee of your company and is assigned all leads matching their filter without affecting the normal assignment rotation
    - Pay in Advance – Renew Allotment – identifies that the Affiliate purchases leads in an allotment block and is then assigned leads matching his filter criteria, each debiting from the allotment total.
    - Pay Monthly – identifies that the Affiliate receives all leads (in rotation) matching his filter criteria and pays the per lead price at the end of the month (or other agreed-upon interval).

Editing an Affiliate User

Clicking on the Edit link in the Affiliates table on the **Manage Affiliates** page navigates to the **Edit Affiliates** page for the user in that row. Some additional options are now available on the **Edit Affiliates** page.

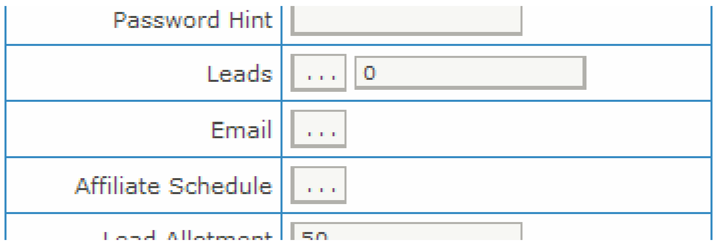


Figure 23 - Additional Affiliate Options

These additional options include:

- Leads – press the supplemental page button to purchase or refund leads for this Affiliate user. This will be covered later in the manual
- Email – press the supplemental page button to customize emails sent to this Affiliate. This is a future feature of the iLead Machine.
- Affiliate Schedule – press the supplemental page button to set a schedule for when leads can be sent to this Affiliate. This is a future feature of the iLead Machine.

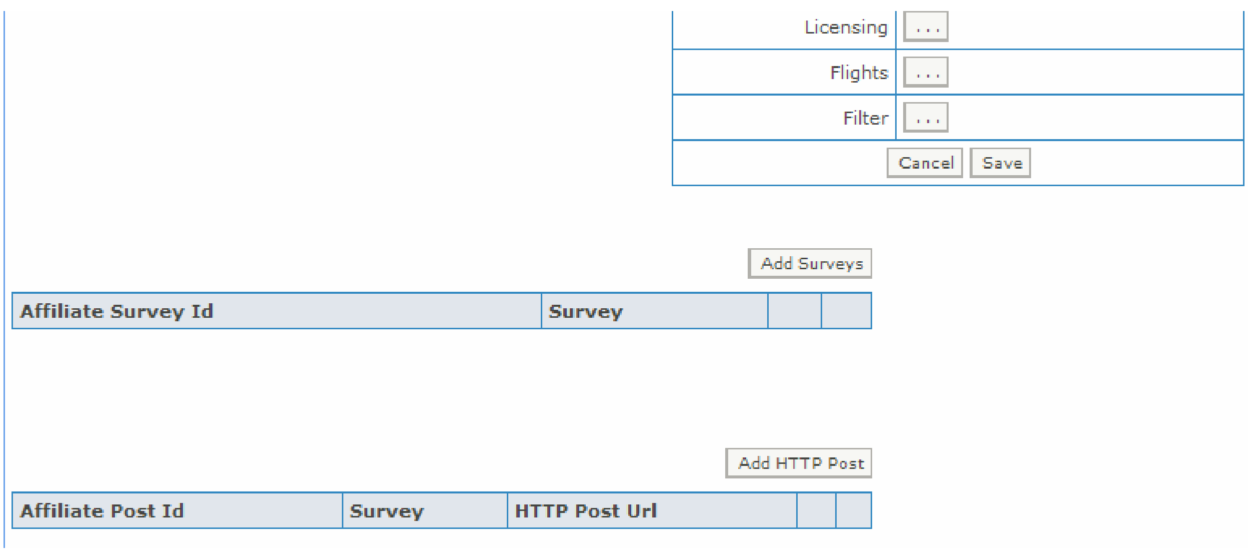


Figure 24 - More Affiliate Options

More options can be found at the bottom of the screen

- Licensing – press the supplemental page button to enter licensing information (by state) for this Affiliate user. This will be covered later in the manual
- Flights – This is a future feature of the iLead Machine.

- Filter - press the supplemental page button to create or edit the filter for this affiliate. Filters will be covered later in the manual.

- Add Surveys – press the Add Surveys button to customize lead delivery emails for this affiliate for a specific survey. This is a future feature of the iLead Machine
- Add HTTP Post – press the Add Surveys button to customize HTTP Posts for this affiliate for delivery of leads from a specific survey. This is a future feature of the iLead Machine

From here you can change any information (with the exception of the Affiliate ID, which is a read-only field) for this Affiliate User. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and you will be returned to the **Manage Affiliates** page.

If you press **Cancel**, any changes you made will not be saved and you will be returned to the **Manage Affiliates** page without the Affiliate user being modified.

DELETING AN AFFILIATE USER

Clicking on the Delete link in the Affiliates table on the **Manage Affiliates** page deletes the Affiliate user in that row. You will be prompted with a confirmation page to verify that you wish to delete this user.

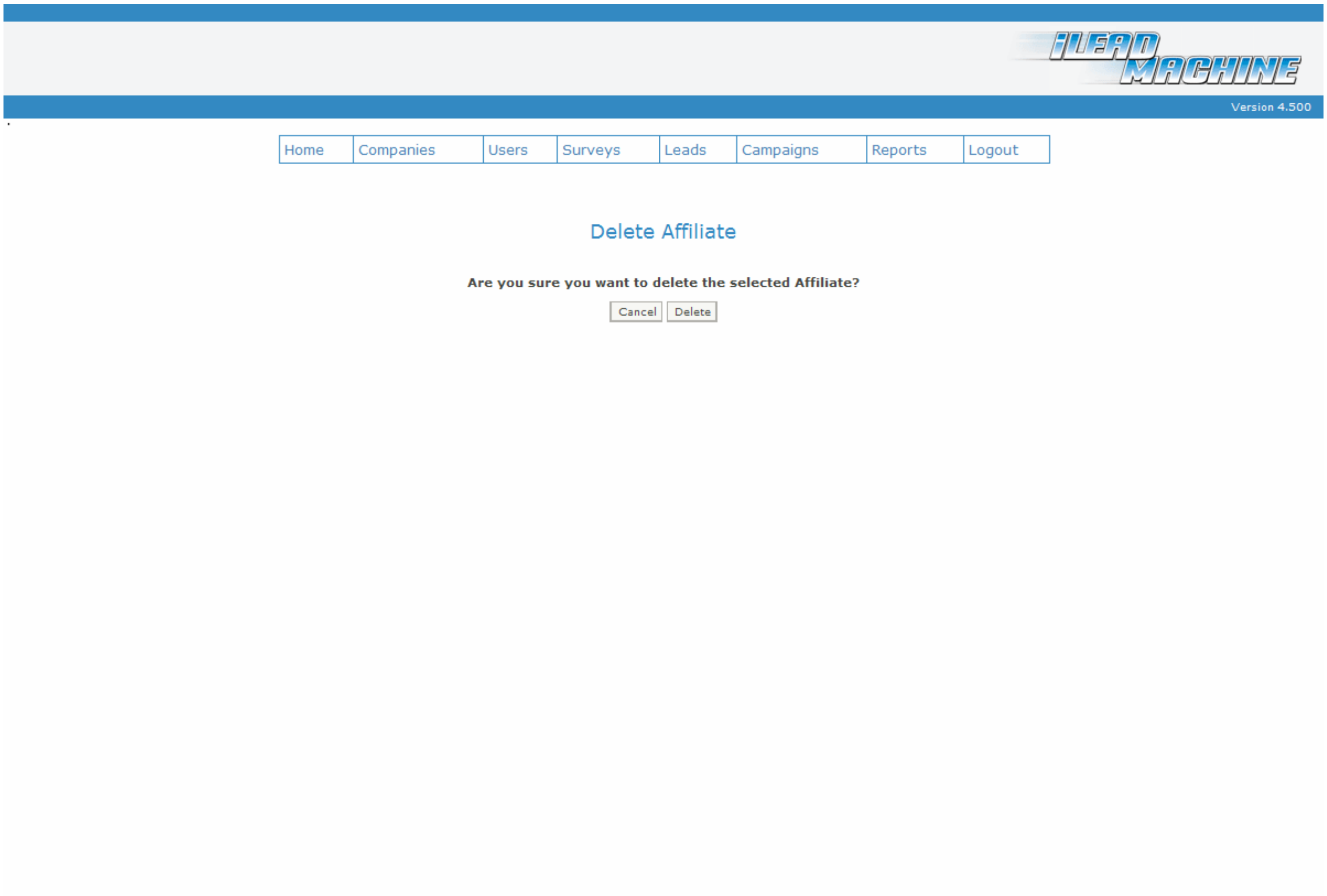


Figure 25 - Deleting an Affiliate

Review and Exercises

Now that you have finished this chapter, you should be able to:

- ✓ Create an iLead Machine Administrator
- ✓ Create an iLead Machine Publisher
- ✓ Create an iLead Machine Affiliate

Exercises:

1. Create an Administrator for your company
2. Create a Publisher for your company
3. Create an Affiliate

Chapter 4: Lead Types and Categories

This chapter covers the creation and properties of Lead Types and Lead Categories. Also included are lead dispositions, return reasons, and promotions, as these are tied into the creation of lead types.

Objectives

After completing this chapter you will be able to:

- ✓ Create and understand Lead Categories and Lead Types
- ✓ Create Lead Dispositions associated with a Lead Type
- ✓ Create Return Reasons associated with a Lead Type
- ✓ Create Promotions associated with a Lead Type

Lead Categories and Types

All leads generated by the iLead Machine are associated with a Lead Category and a Lead Type. These are determined by the survey properties of the survey form from which the lead was generated. Therefore, before you can create a new survey form, you must understand the properties of the leads that will be generated.

LEAD CATEGORIES

Lead Categories determine the cost of a lead. This may seem confusing since the cost of a lead would appear to be associated with a single affiliate (i.e. each affiliate pays a different price for a lead based on their contract). Future functionality of the iLead Machine will allow for the purchase of leads through a Portal site or Storefront and the starting price will be determined by the Lead Category.

The **Lead Categories** page is accessed through the *Leads>Lead Categories menu* from the Navigation Bar.

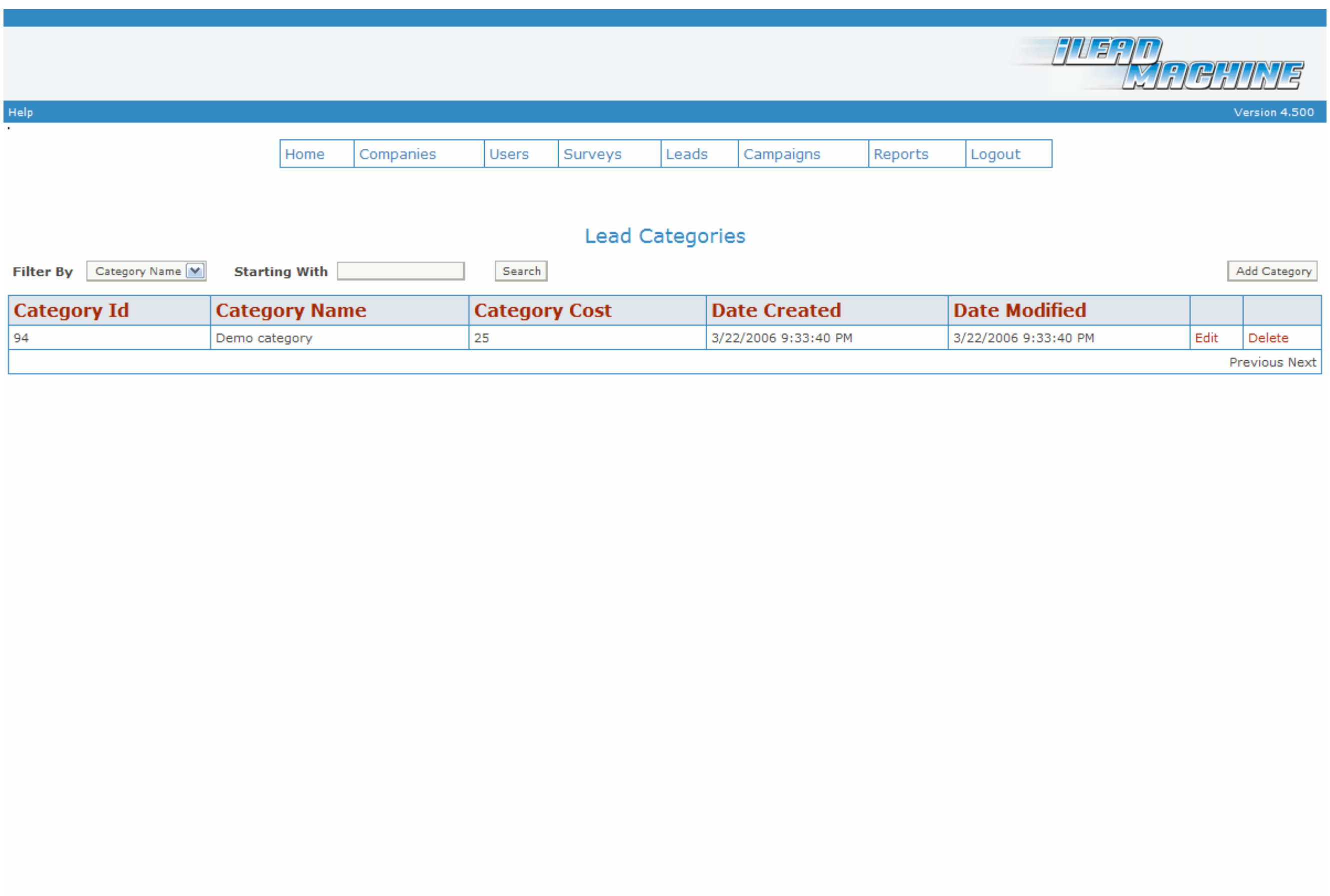


Figure 26 - Lead Categories

The current list of Lead Categories is displayed with a default sort order on the Category Name column. Clicking any of the Column header links changes the display to sort by that column. Clicking on the same Column header link inverts the sort order on the same column.

You can also use the **Filter By** drop-down list box to limit the display to records matching selected criteria. The available options for this page are:

- Category Name

Adding a Lead Category

Press the **Add Category** button to display the **Edit Category** page. This page is used not only to edit an existing Category but also to create a new one.

Figure 27 - Adding a Category

Most pages in the iLead Machine Administrative Portal display an “ID” field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are creating a new Category this field will display “<New>”.

There are two required fields for creating a new Lead Category:

- Category Name – enter the name of the Lead Category as you would like it to be displayed
- Category Cost – enter the cost of a lead in this category

Once you have completed all required fields, press the **Save** button. The Category will be created in the iLead Machine database and you will be returned to the **Lead Categories** page.

If you press **Cancel**, any information you entered will not be saved and you will be returned to the **Lead Categories** page without the Lead Category being created.

Editing a Lead Category

Clicking on the Edit link in the Categories table on the **Lead Categories** page navigates to the **Edit Category** page for the category in that row.

From here you can change any information (with the exception of the Category ID, which is a read-only field) for this Lead Category. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and you will be returned to the **Lead Categories** page.

If you press **Cancel**, any changes you made will not be saved and you will be returned to the **Lead Categories** page without the Category being modified.

DELETING A LEAD CATEGORY

Clicking on the Delete link in the Categories table on the **Lead Categories** page deletes the Category in that row. You will be prompted with a confirmation page to verify that you wish to delete this category.

WARNING: If you delete a category currently associated with a survey or lead, you could cause issues with that existing lead or new leads generated by the survey.

If you wish to delete the Category press the **Save** button. The category will be deleted from the iLead Machine database and you will be returned to the **Lead Categories** page.

If you press **Cancel** you will be returned to the **Lead Categories** page without the Category being deleted.

LEAD TYPES

Lead Types determine a number of characteristics of the lead. Associated with a lead type are properties such as Lead Dispositions, Return Reasons, and Promotions. This allows you to have a library of these properties and decide on a subset that is valid for a specific Lead Type

The **Lead Types** page is accessed through the *Leads>Lead Types* menu from the Navigation Bar.

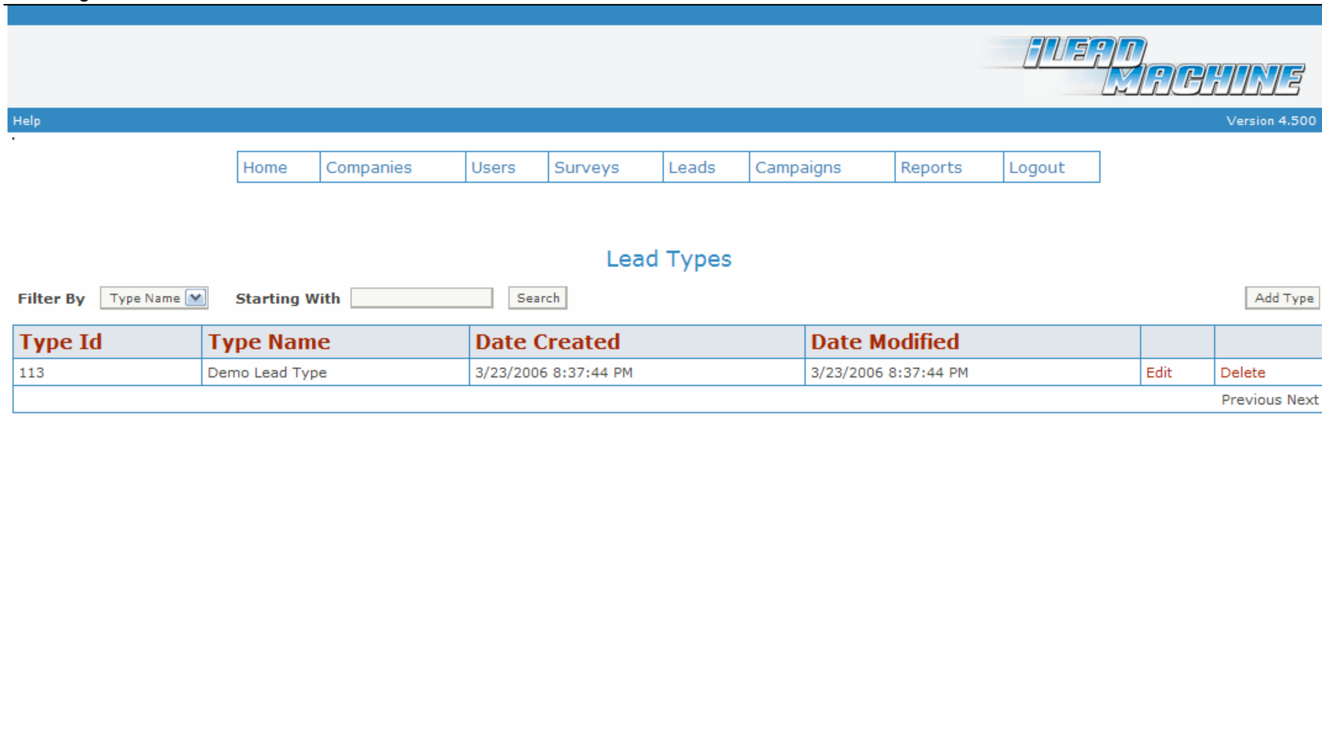


Figure 28 - Lead Types

The current list of Lead Types is displayed with a default sort order on the Lead Type Name column. Clicking any of the Column header links changes the display to sort by that column. Clicking on the same Column header link inverts the sort order on the same column.

You can also use the **Filter By** drop-down list box to limit the display to records matching selected criteria. The available options for this page are:

- Type Name

ADDING A LEAD TYPE

Press the **Add Type** button to display the **Edit Type** page. This page is used not only to edit an existing Type but also to create a new one.

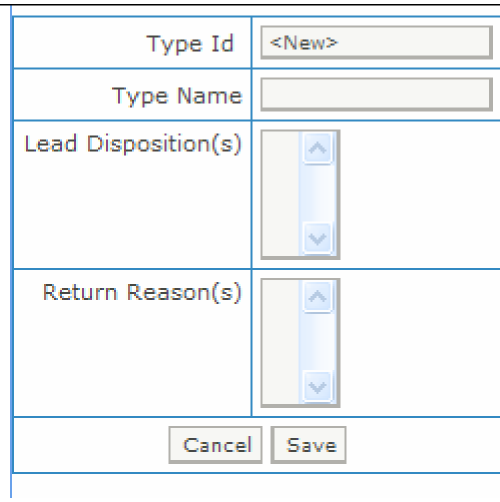


Figure 29 - Adding a Lead Type

Most pages in the iLead Machine Administrative Portal display an “ID” field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are creating a new Lead Type this field will display “<New>”.

There is one required field for creating a new Lead Type:

- Type Name – enter the name of the Lead Type as you would like it to be displayed

Lead Dispositions and Return Reasons can be associated with the lead type by selecting them from the list boxes. Lead Dispositions and Return Reasons will be covered later in this section.

Once you have completed all required fields, press the **Save** button. The Type will be created in the iLead Machine database and you will be returned to the **Lead Types** page.

If you press **Cancel**, any information you entered will not be saved and you will be returned to the **Lead Types** page without the Lead Type being created.

EDITING A LEAD TYPE

Clicking on the Edit link in the Categories table on the **Lead Types** page navigates to the **Edit Type** page for the type in that row.

From here you can change any information (with the exception of the Type ID, which is a read-only field) for this Lead Type. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and you will be returned to the **Lead Types** page.

You can also add Promotions to a Lead Type at this time by pressing the **Add Promotion** button. Creating Promotions and associating them with a Lead Type will be covered later in this section.

If you press **Cancel**, any changes you made will not be saved and you will be returned to the **Lead Types** page without the Type being modified.

DELETING A LEAD TYPE

Clicking on the Delete link in the Type table on the **Lead Types** page deletes the Type in that row. You will be prompted with a confirmation page to verify that you wish to delete this type.

WARNING: If you delete a type currently associated with a survey or lead, you could cause issues with that existing lead or new leads generated by the survey.

If you wish to delete the Type press the **Save** button. The type will be deleted from the iLead Machine database and you will be returned to the **Lead Types** page.

If you press **Cancel** you will be returned to the **Lead Types** page without the Type being deleted.

Lead Type Properties

The iLead Machine allows you to associate a number of properties with each lead type. These properties are created in libraries so that you can use the same property with one or more lead types.

LEAD DISPOSITIONS

Lead Dispositions allow an Affiliate to set a status for a lead in the Affiliate Portal site. This provides at least a basic level of Customer Relationship Management functionality in the iLead Machine. You can create a library of lead dispositions and then associate some or all with each lead type.

The **Lead Dispositions** page is accessed through the *Leads>Lead Dispositions* menu from the Navigation Bar.

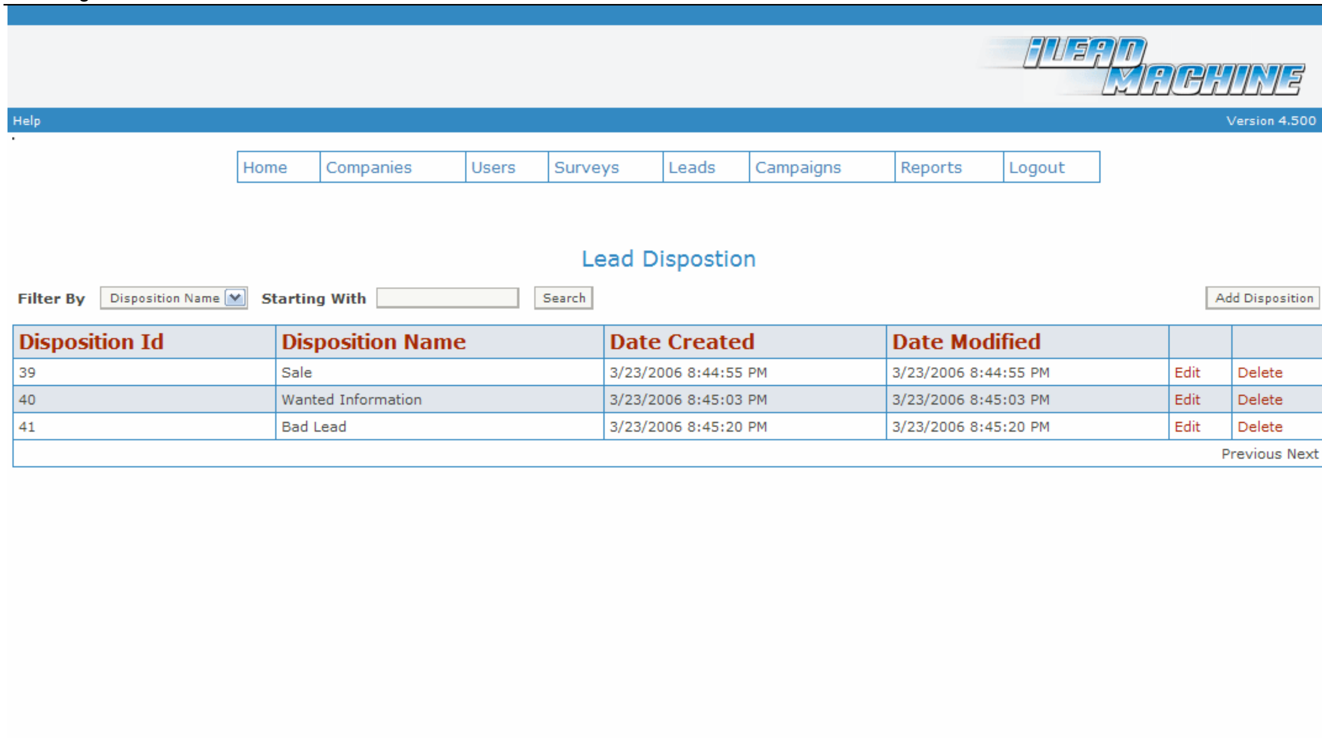


Figure 30 - Lead Dispositions

The current list of Lead Dispositions is displayed with a default sort order on the Lead Disposition Name column. Clicking any of the Column header links changes the display to sort by that column. Clicking on the same Column header link inverts the sort order on the same column.

You can also use the **Filter By** drop-down list box to limit the display to records matching selected criteria. The available options for this page are:

- Disposition Name

ADDING A LEAD DISPOSITION

Press the **Add Disposition** button to display the **Edit Disposition** page. This page is used not only to edit an existing Disposition but also to create a new one.

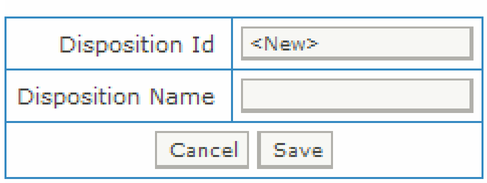


Figure 31 - Adding a Disposition

Most pages in the iLead Machine Administrative Portal display an “ID” field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are creating a new Lead Disposition this field will display “<New>”.

There is one required field for creating a new Lead Disposition:

- Disposition Name – enter the name of the Lead Disposition as you would like it to be displayed

Once you have completed all required fields, press the **Save** button. The Disposition will be created in the iLead Machine database and you will be returned to the **Lead Dispositions** page.

If you press **Cancel**, any information you entered will not be saved and you will be returned to the **Lead Dispositions** page without the Lead Disposition being created.

EDITING A LEAD DISPOSITION

Clicking on the Edit link in the Categories table on the **Lead Dispositions** page navigates to the **Edit Disposition** page for the disposition in that row.

From here you can change any information (with the exception of the Disposition ID, which is a read-only field) for this Lead Disposition. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and you will be returned to the **Lead Dispositions** page.

If you press **Cancel**, any changes you made will not be saved and you will be returned to the **Lead Dispositions** page without the Disposition being modified.

DELETING A LEAD DISPOSITION

Clicking on the Delete link in the Disposition table on the **Lead Dispositions** page deletes the Disposition in that row. You will be prompted with a confirmation page to verify that you wish to delete this Disposition.

WARNING: If you delete a Disposition currently associated with a lead type, you could cause issues with that existing lead

If you wish to delete the Disposition press the **Save** button. The Disposition will be deleted from the iLead Machine database and you will be returned to the **Lead Dispositions** page.

If you press **Cancel** you will be returned to the **Lead Dispositions** page without the Disposition being deleted.

RETURN REASONS

Return Reasons allow an Affiliate to specify a reason when requesting a credit for a lead that they consider invalid. You can create a library of return reasons and then associate some or all with each lead type.

The **Return Reasons** page is accessed through the *Leads>Return Reasons* menu from the Navigation Bar.

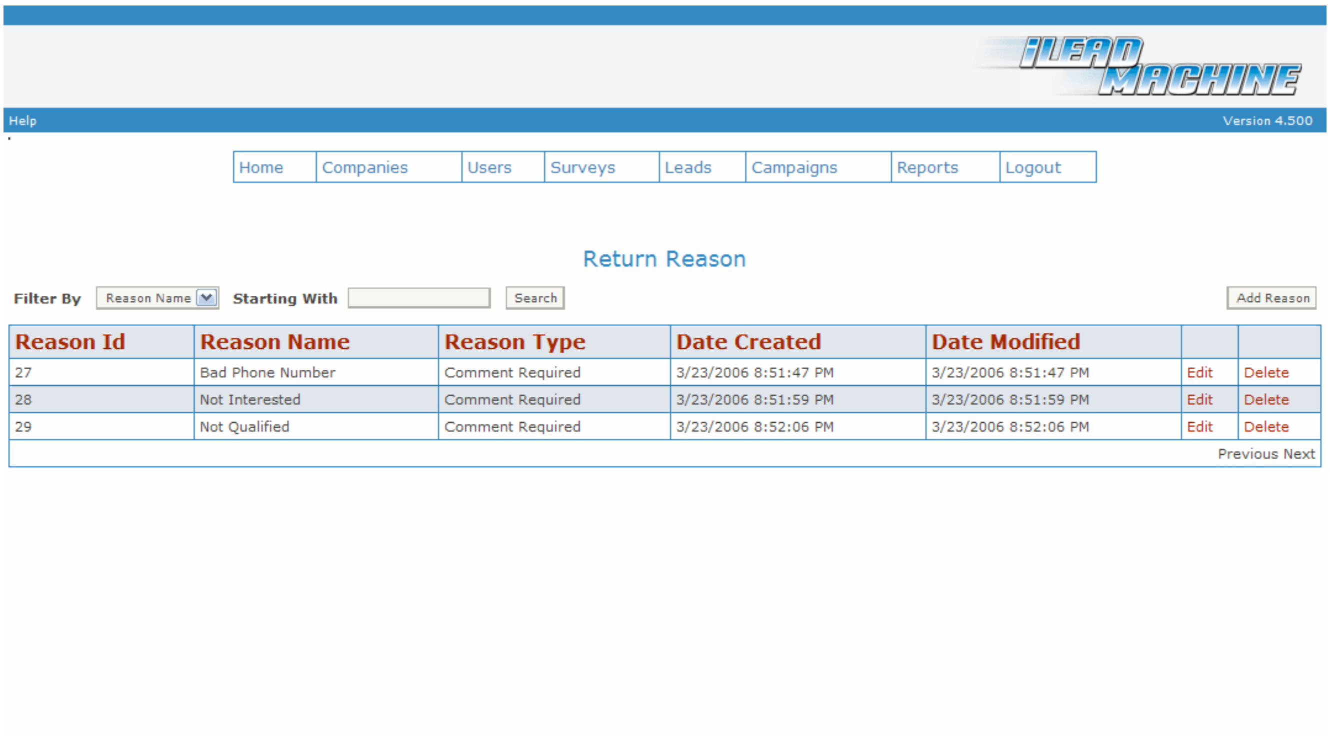


Figure 32 - Return Reasons

The current list of Return Reasons is displayed with a default sort order on the Reason Name column. Clicking any of the Column header links changes the display to sort by that column. Clicking on the same Column header link inverts the sort order on the same column.

You can also use the **Filter By** drop-down list box to limit the display to records matching selected criteria. The available options for this page are:

- Reason Name

ADDING A RETURN REASON

Press the **Add Reason** button to display the **Edit Reason** page. This page is used not only to edit an existing Reason but also to create a new one.

Figure 33 - Adding a Reason

Most pages in the iLead Machine Administrative Portal display an “ID” field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are creating a new Return Reason this field will display “<New>”.

There is one required field for creating a new Return Reason:

- Reason Name – enter the name of the Return Reason as you would like it to be displayed

Other fields allow you to set additional parameters for the Return Reason:

- Reason Type – the drop-down list box contains two choices:
  - Comment required – identifies that an affiliate selecting this reason must provide a comment when requesting the return and credit
  - Standard – identifies that an affiliate selecting this reason is not required to provide a comment when requesting the return and credit
- Comments – enter the instructions you would like the Affiliate to see when they select this Return Reason (i.e. “Please enter comments below”).

Once you have completed all required fields, press the **Save** button. The Reason will be created in the iLead Machine database and you will be returned to the **Return Reasons** page.

If you press **Cancel**, any information you entered will not be saved and you will be returned to the **Return Reasons** page without the Return Reason being created.

EDITING A RETURN REASON

Clicking on the <u>Edit</u> link in the Categories table on the **Return Reasons** page navigates to the **Edit Reason** page for the reason in that row.

From here you can change any information (with the exception of the Reason ID, which is a read-only field) for this Return Reason. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and you will be returned to the **Return Reasons** page.

If you press **Cancel**, any changes you made will not be saved and you will be returned to the **Return Reasons** page without the Reason being modified.

DELETING A RETURN REASON

Clicking on the Delete link in the Reason table on the **Return Reasons** page deletes the Reason in that row. You will be prompted with a confirmation page to verify that you wish to delete this Reason.

WARNING: If you delete a Return Reason currently associated with a lead type, you could cause issues with that existing lead

If you wish to delete the Reason press the **Save** button. The Reason will be deleted from the iLead Machine database and you will be returned to the **Return Reasons** page.

If you press **Cancel** you will be returned to the **Return Reasons** page without the Reason being deleted.

PROMOTIONS

Promotions allow you to associate special deals with a lead type. For example, you may offer a gift card or discount to any customer who completes a deal with one of your affiliates. The process for requesting and fulfilling promotions will be covered later in this manual.

The **Promotions** page is accessed through the *Leads> Promotions* menu from the Navigation Bar.

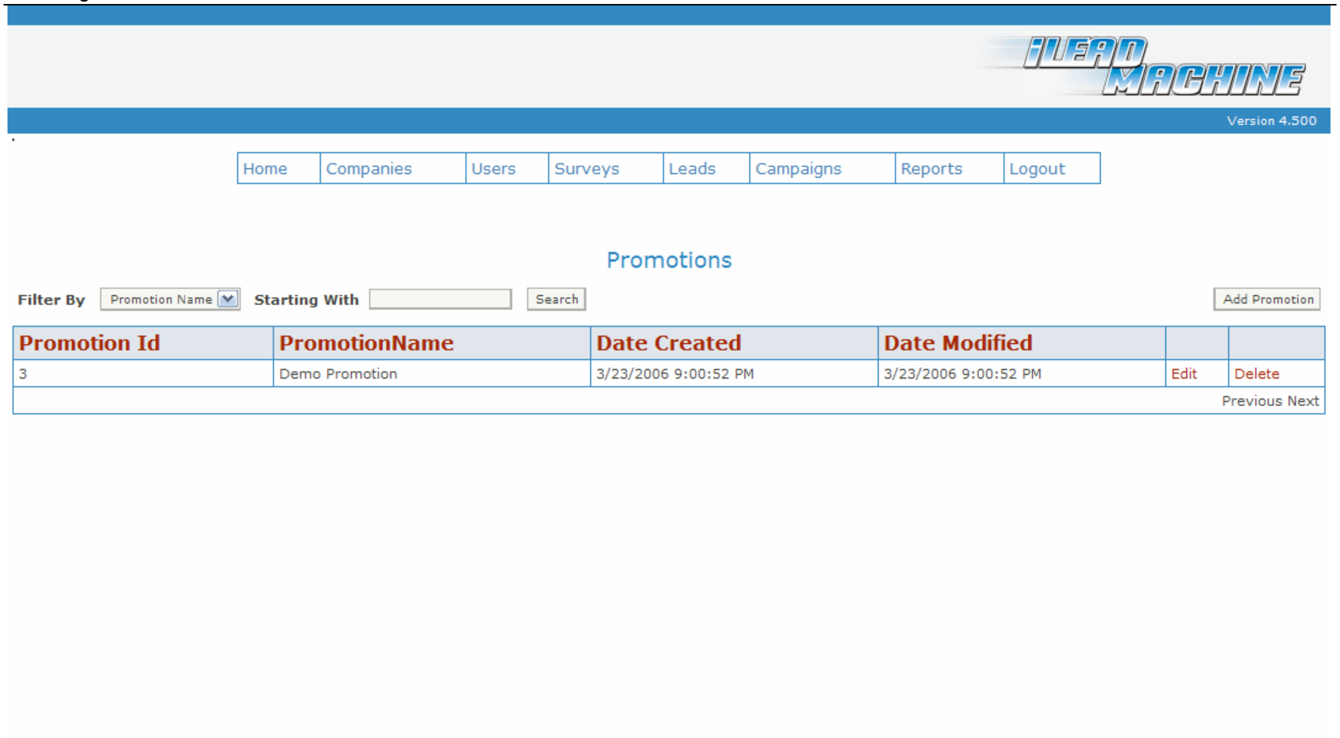


Figure 34 - Promotions

The current list of Promotions is displayed with a default sort order on the Promotion Name column. Clicking any of the Column header links changes the display to sort by that column. Clicking on the same Column header link inverts the sort order on the same column.

You can also use the **Filter By** drop-down list box to limit the display to records matching selected criteria. The available options for this page are:

- Promotion Name

ADDING A PROMOTION

Press the **Add Promotion** button to display the **Edit Promotion** page. This page is used not only to edit an existing Promotion but also to create a new one.

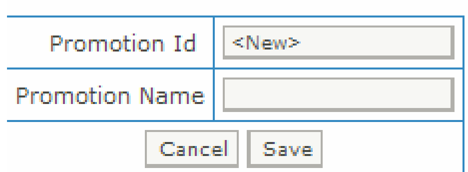


Figure 35 - Adding a Promotion

Most pages in the iLead Machine Administrative Portal display an “ID” field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are creating a new Promotion this field will display “<New>”.

There is one required field for creating a new Promotion:

- Promotion Name – enter the name of the Promotion as you would like it to be displayed

Once you have completed all required fields, press the **Save** button. The Promotion will be created in the iLead Machine database and you will be returned to the **Promotions** page.

If you press **Cancel**, any information you entered will not be saved and you will be returned to the **Promotions** page without the Promotion being created.

EDITING A PROMOTION

Clicking on the Edit link in the Categories table on the **Promotions** page navigates to the **Edit Promotions** page for the promotion in that row.

From here you can change any information (with the exception of the Promotion ID, which is a read-only field) for this Promotion. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and you will be returned to the **Promotions** page.

If you press **Cancel**, any changes you made will not be saved and you will be returned to the **Promotions** page without the Promotion being modified.

DELETING A PROMOTION

Clicking on the Delete link in the Promotion table on the **Promotions** page deletes the Promotion in that row. You will be prompted with a confirmation page to verify that you wish to delete this Promotion.

WARNING: If you delete a Promotion currently associated with a lead type, you could cause issues with that existing lead

If you wish to delete the Promotion press the **Save** button. The Promotion will be deleted from the iLead Machine database and you will be returned to the **Promotions** page.

If you press **Cancel** you will be returned to the **Promotions** page without the Promotion being deleted.

ASSOCIATING A PROMOTION TO A LEAD TYPE

Once you have created a promotion in your library, you will need to associate it with a lead type to make it available. To do this, you will need to edit an existing lead type and press the **Add Promotion** button.

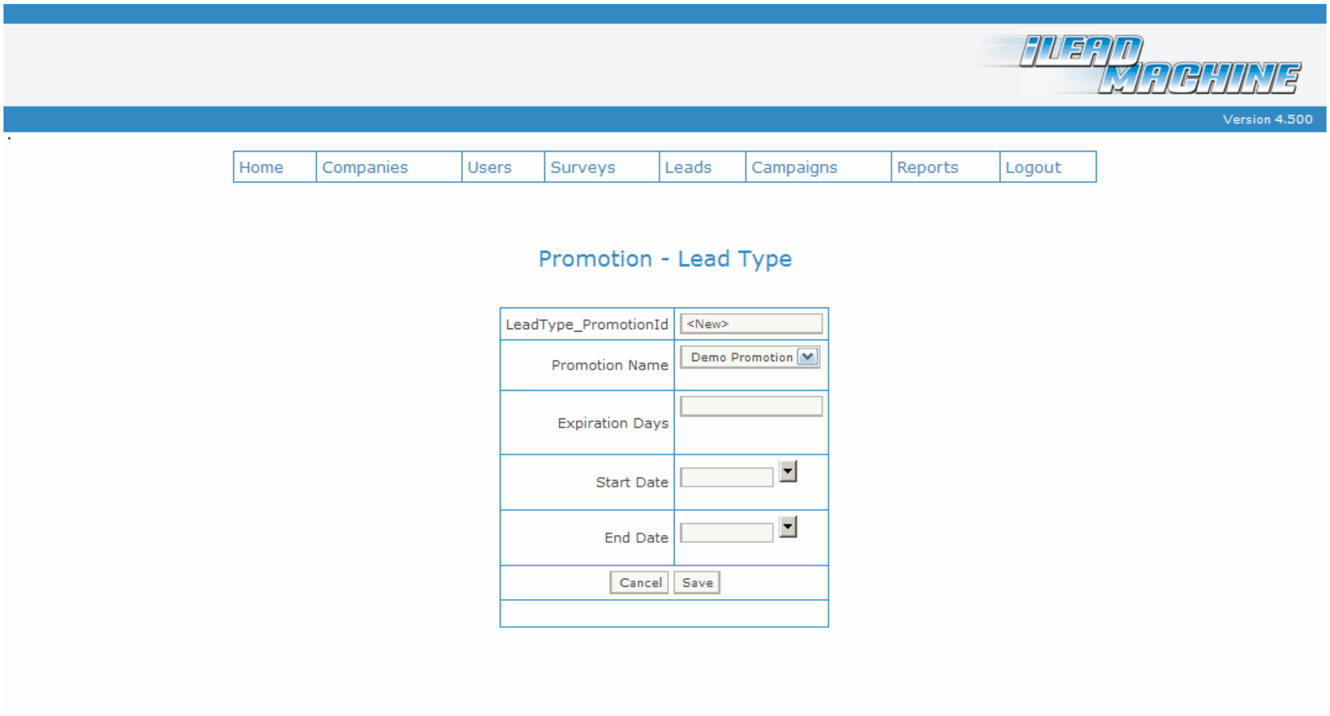


Figure 36 - Associating a Promotion to a Lead Type

Most pages in the iLead Machine Administrative Portal display an "ID" field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are associating a new Promotion to a Lead Type this field will display "<New>".

There are four required fields for associating a Promotion to a Lead Type:

- Promotion Name – use the drop-down list box to select an existing promotion and associate it with this lead type
- Expiration Days – enter the number of days after the lead was assigned up to which the affiliate can request a promotion to be fulfilled for this customer.
- Start Date – enter the start date after which leads of this type can have the promotion available. Pressing the **drop-down arrow button** displays a calendar tool for selecting the date
- End Date – enter the end date after which leads of this type will not have the promotion available. Pressing the **drop-down arrow button** displays a calendar tool for selecting the date

Once you have completed all required fields, press the **Save** button. The Promotion will be associated to the lead type in the iLead Machine database and you will be returned to the **Edit Type** page. The information you entered for this instance of the promotion will be displayed.

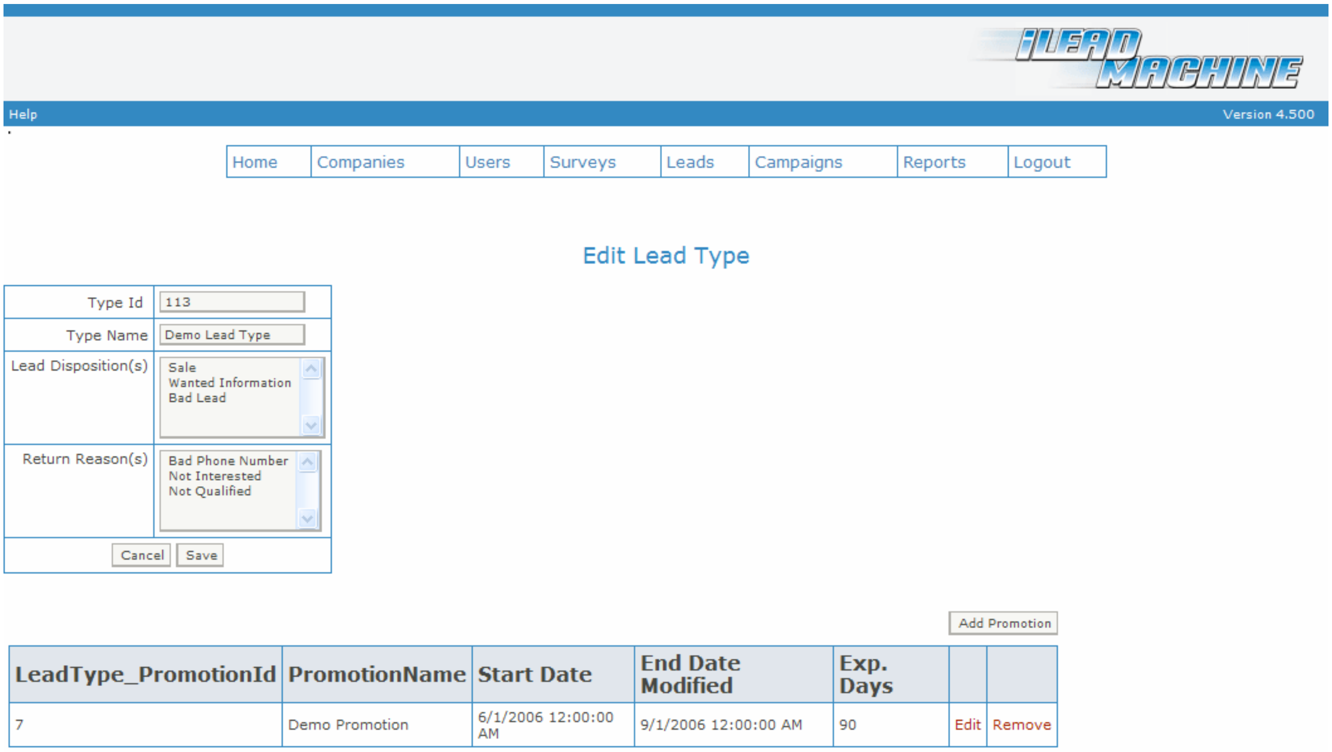


Figure 37 - Promotion Display

If you press **Cancel**, any information you entered will not be saved and you will be returned to the **Edit Type** page without the Promotion being associated with this lead type.

You may edit or remove (disassociate) this promotion for this lead type by clicking on the appropriate link in the Promotions table.

Review and Exercises

Now that you have finished this chapter, you should be able to:

- ✓ Create and understand Lead Categories and Lead Types
- ✓ Create Lead Dispositions associated with a Lead Type
- ✓ Create Return Reasons associated with a Lead Type
- ✓ Create Promotions associated with a Lead Type

Exercises:

1. Create a Lead Category
2. Create a Lead Type
3. Create Lead Dispositions and associate them with your lead type
4. Create Return Reasons and associate them with your lead type
5. Create a Promotion and associate it with your lead type

Chapter 5: Creating Surveys

This chapter covers the creation of iLead Machine survey forms. You will learn to create and manage answer and question libraries and set up surveys that use these questions to create leads.

Objectives

After completing this chapter you will be able to:

- ✓ Create and understand Answers and Answer Types
- ✓ Create Questions and Associate Answers
- ✓ Create and modify Survey properties
- ✓ Add questions to Surveys and understand the various Question types
- ✓ Map questions and answers to leads

Surveys – an Overview

The heart of the iLead Machine is the ability to create a survey and generate leads. The iLead Machine uses a dynamic method of creating surveys, allowing you to reuse questions and answers on multiple surveys – even in different formats or with different answer values.

There are many strategies for creating surveys, questions and answers. The process we will cover is perhaps the easiest and quickest way to create a survey, but it requires some forethought. Before you use the iLead Machine to create your questions and answers, you should determine what your survey will look like. Questions to ask in this process include;

1. What questions do I want answered?
2. What are the valid answers for each question? (for checkboxes, radio buttons, and list boxes)
3. Which questions are required and which are optional?
4. What do I want my survey to look like (order of questions, columns, etc.)

Once you have answered these questions you will be able to quickly create your libraries of answers and questions and then your survey itself.

Answers

The iLead Machine allows you to create a library of answers. These answers can then be associated with any number of questions and any number of surveys.

Managing Survey Answers

The **Manage Survey Answers** page is accessed through the *Surveys>Manage Answers* menu from the Navigation Bar.

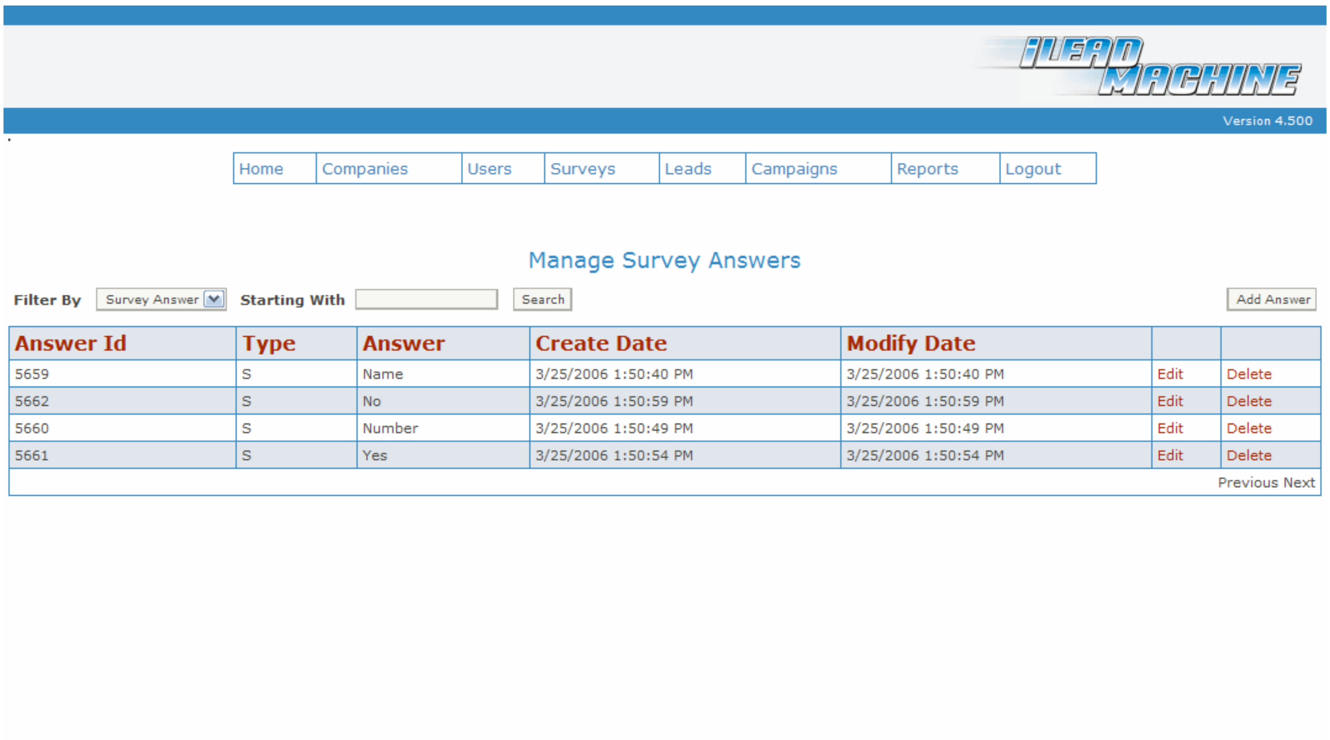


Figure 38 - Manage Survey Answers

The current list of Answers is displayed with a default sort order on the Answer column. Clicking any of the Column header links changes the display to sort by that column. Clicking on the same Column header link inverts the sort order on the same column.

You can also use the **Filter By** drop-down list box to limit the display to records matching selected criteria. The available options for this page are:

- Survey Answer
- Type

ADDING AN ANSWER

Press the **Add Answer** button to display the **Edit Survey Answer** page. This page is used not only to edit an existing Answer but also to create a new one.

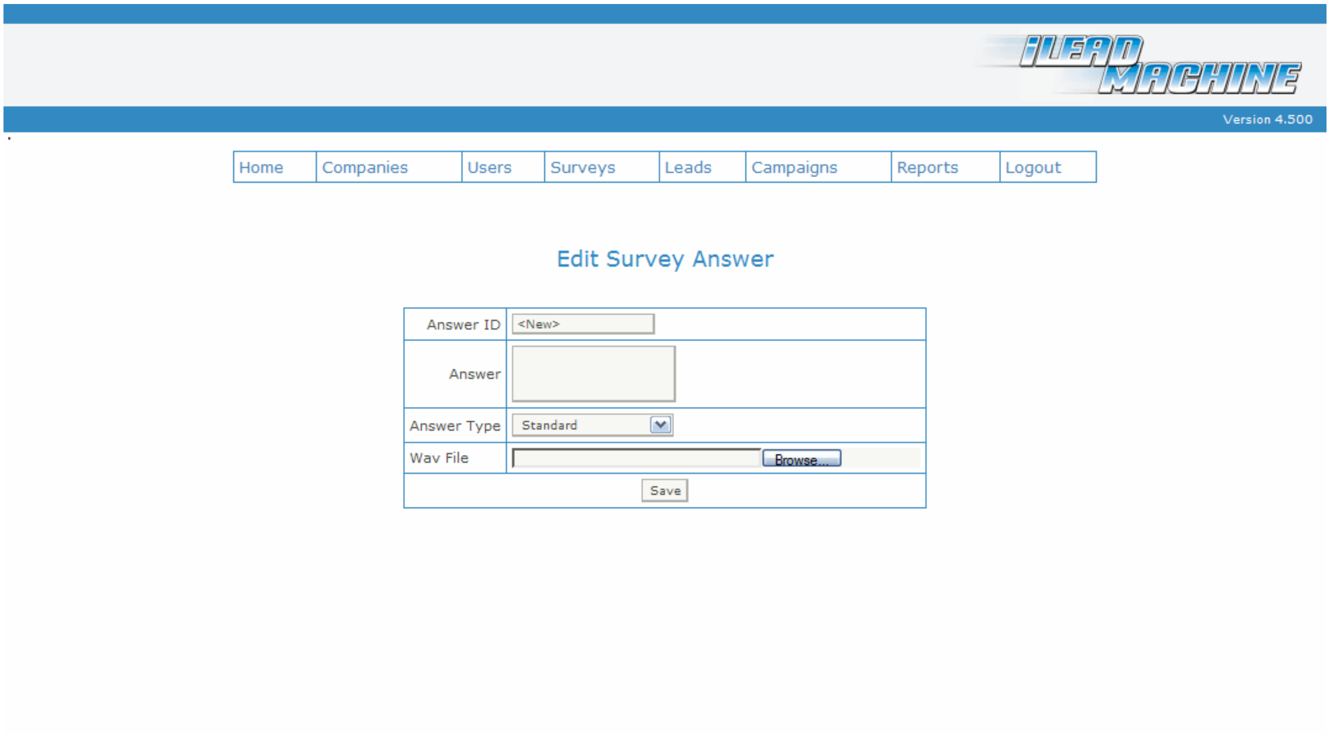


Figure 39 - Adding an Answer

Most pages in the iLead Machine Administrative Portal display an "ID" field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are creating a new Answer this field will display "<New>".

There are two required fields for creating a new Survey Answer:

- Answer – enter the value of the Answer.

NOTE: Answer values may or may not be displayed on the survey form, depending on the type of question the answer is associated with. This will be covered later in this section when associating answers with questions.

- Answer Type – select the type of answer from the drop-down list box. Current values include:
  - Standard – indicates that there are no special properties of this answer value
  - Calculated – indicates that the answer is determined by a calculation of other answer values. Calculated answers will be discussed later in this section.
  - Invalid – indicates that this answer will be considered invalid if selected for a required question. This allows you to have a default answer for a drop-down list box (e.g. "Please Select" or "Choose one") without that answer being allowed.

NOTE: There are a number of additional answer types in the list box that are associated with future functionality of the iLead Machine. These will not be discussed in this manual.

- Wav File – this is a future feature of the iLead Machine.

Once you have completed all required fields, press the **Save** button. The Answer will be created in the iLead Machine database and you will be returned to the **Manage Survey Answers** page.

If you press **Cancel**, any information you entered will not be saved and you will be returned to the **Manage Survey Answers** page without the Answer being created.

CALCULATED ANSWERS

A Calculated Answer is an answer that the consumer does not input directly in the survey form. Instead, the value is calculated at the time of submission based on other input or calculated answer values.

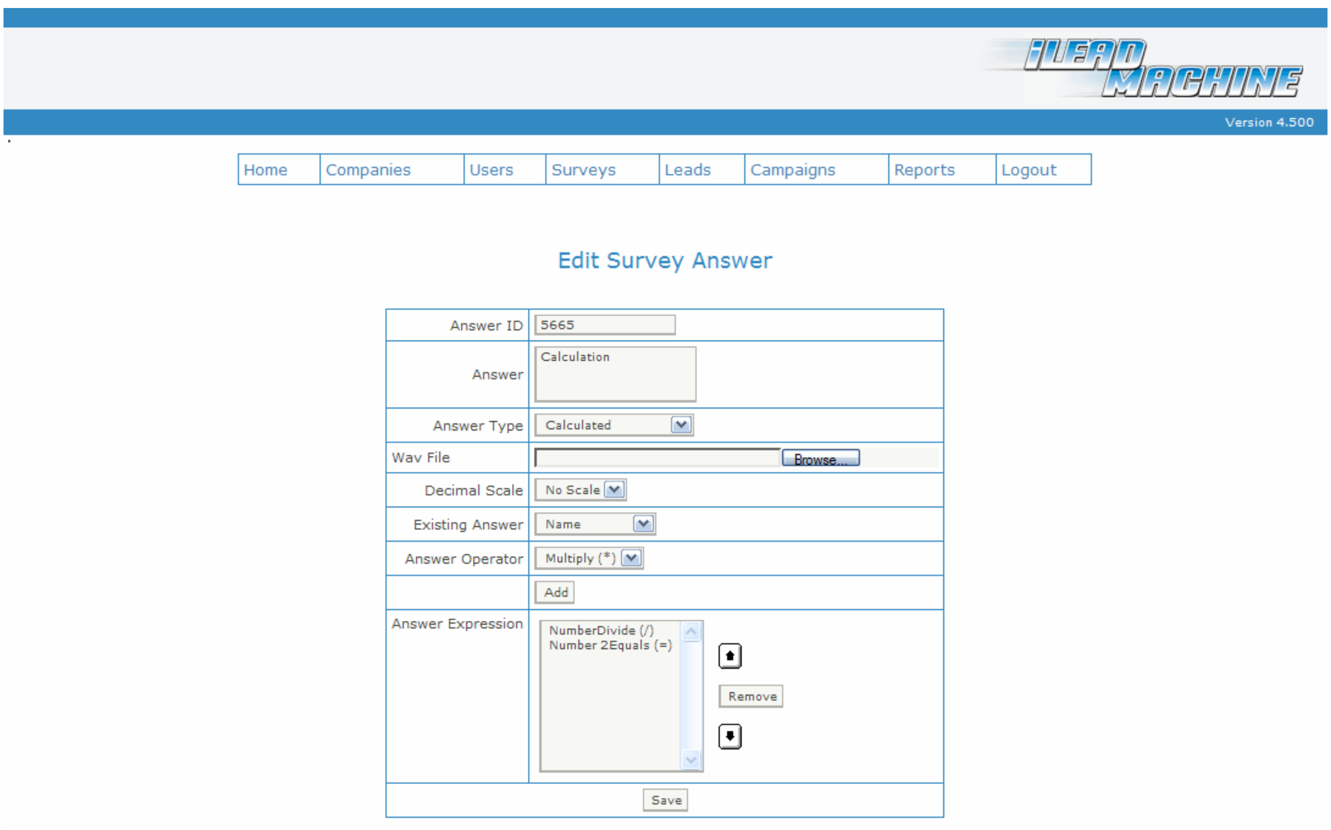


Figure 40 - Calculated Answers

The additional fields for configuring a Calculated Answer include:

- Decimal Scale – use the drop-down list box to select the number of decimal points you would like the calculation to be rounded to, or select “No Scale” if you do not want any rounding.
- Existing Answer – use the drop-down list box to select an existing answer value to use in the calculation
- Answer Operator – use the drop-down list box to select the mathematical operator to append to the the existing answer selected above in the calculation expression. Operators include:
    - Add
    - Divide
    - Multiply
    - Subtract
    - Equals

- Add – press the **Add** button to add the selected answer and operator to the Answer Expression below.
- Answer Expression – displays the current expression for calculating the answer value. Selecting a line within the expression (e.g. Number Divide (/)) allows you to either remove it from the expression (pressing the **Remove** button) or change the order of the terms in the expression.

NOTE: The last line of the Answer Expression should end with the Operator “Equals”.

WARNING: The Answer expression does not use standard mathematical Order of Operations. The calculation is done in the order it is displayed.

EDITING AN ANSWER

Clicking on the Edit link in the Answers table on the **Answers** page navigates to the **Edit Survey Answer** page for the answer in that row.

From here you can change any information (with the exception of the Answer ID, which is a read-only field) for this Question. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and you will be returned to the **Manage Survey Answers** page.

If you press **Cancel**, any changes you made will not be saved and you will be returned to the **Manage Survey Answers** page without the Answer being modified.

DELETING AN ANSWER

Clicking on the Delete link in the Answers table on the **Manage Survey Answers** page deletes the Answer in that row. You will be prompted with a confirmation page to verify that you wish to delete this Answer.

WARNING: If you delete a Answer currently associated with a question or survey, it will no longer be available to select on that survey form.

If you wish to delete the Answer press the **Save** button. The Answer will be deleted from the iLead Machine database and you will be returned to the **Manage Survey Answers** page.

If you press **Cancel** you will be returned to the **Manage Survey Answers** page without the Answer being deleted.

Questions

The iLead Machine allows you to create a library of Questions. These Questions can then be associated with any number of surveys.

MANAGING SURVEY QUESTIONS

The **Manage Survey Questions** page is accessed through the *Surveys>Manage Questions* menu from the Navigation Bar.

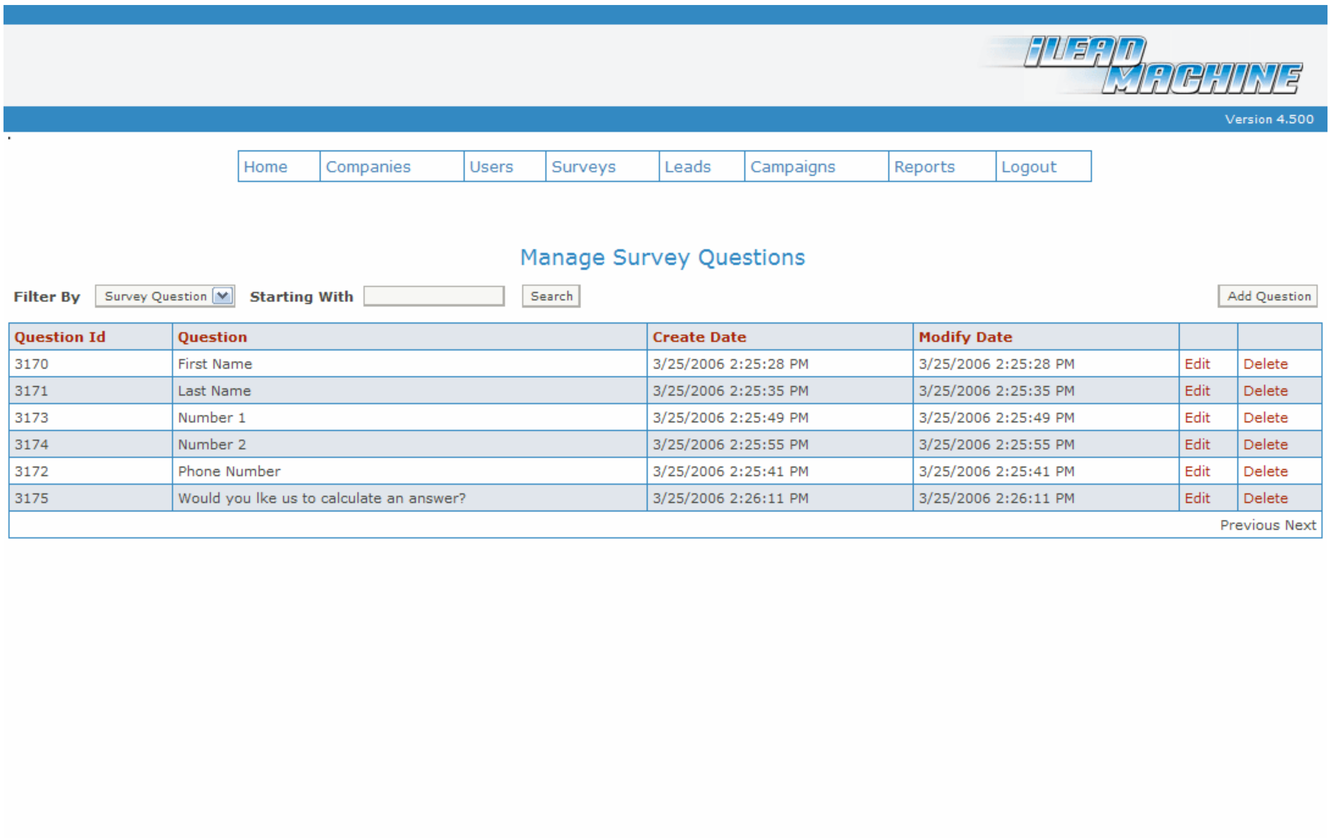


Figure 41 - Manage Survey Questions

The current list of Questions is displayed with a default sort order on the Question column. Clicking any of the Column header links changes the display to sort by that column. Clicking on the same Column header link inverts the sort order on the same column.

You can also use the **Filter By** drop-down list box to limit the display to records matching selected criteria. The available options for this page are:

- Survey Question

ADDING A QUESTION

Press the **Add Question** button to display the **Edit Survey Question** page. This page is used not only to edit an existing Question but also to create a new one.

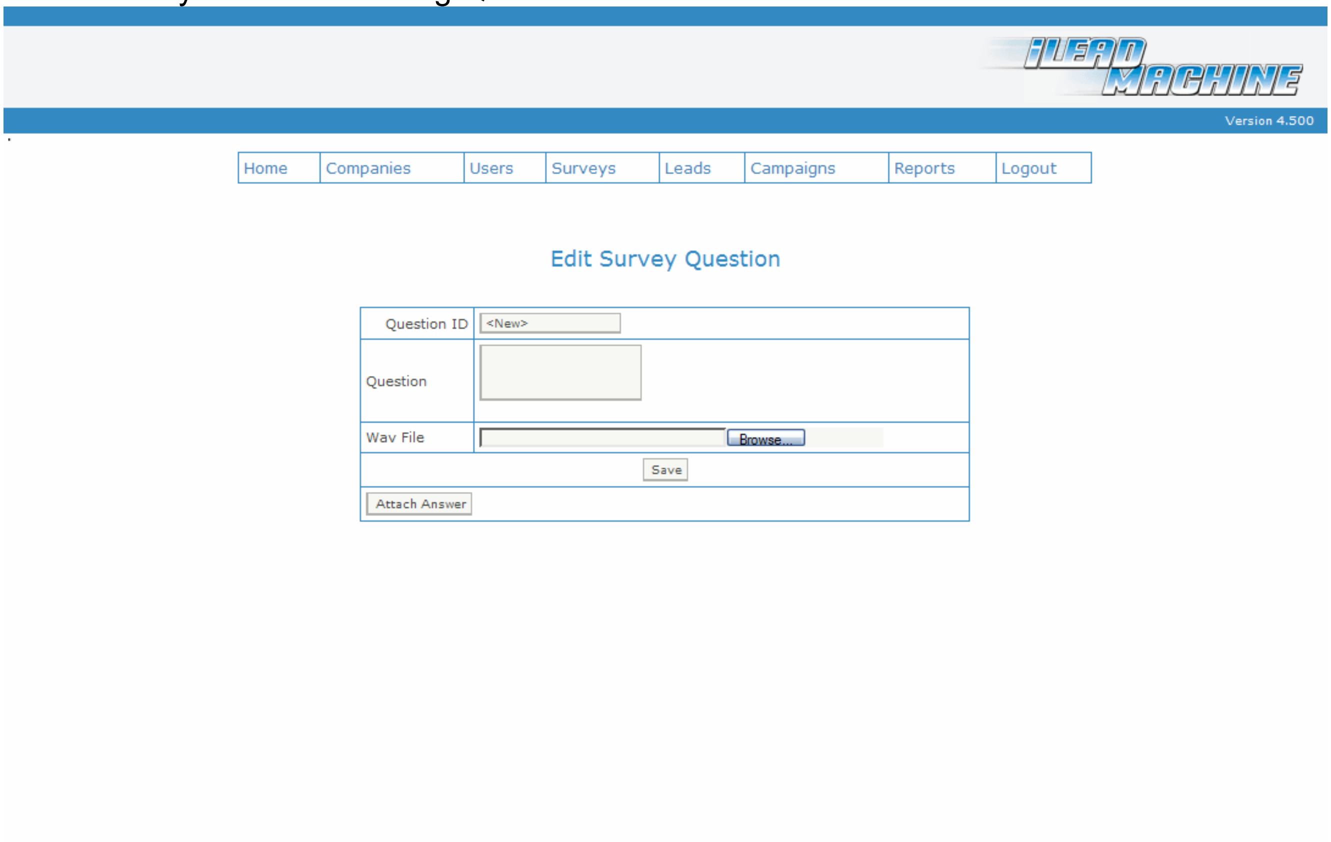


Figure 42 - Adding a Question

Most pages in the iLead Machine Administrative Portal display an "ID" field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are creating a new Question this field will display "<New>".

There is one required field for creating a new Survey Question:

- Question – enter the value of the Question.
- Wav File – this is a future feature of the iLead Machine.

Once you have completed all required fields, press the **Save** button. The Question will be created in the iLead Machine database and you will be returned to the **Manage Survey Questions** page.

If you press **Cancel**, any information you entered will not be saved and you will be returned to the **Manage Survey Questions** page without the Question being created.

Editing a Question

Clicking on the Edit link in the Questions table on the **Questions** page navigates to the **Edit Survey Question** page for the question in that row.

From here you can change any information (with the exception of the Question ID, which is a read-only field) for this Question. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and you will be returned to the **Manage Survey Questions** page.

If you press **Cancel**, any changes you made will not be saved and you will be returned to the **Manage Survey Questions** page without the Question being modified.

Adding Answers to a Question

Once you have added a question, you can also add, or associate, one or more answers to this question. This is helpful if you have a standard set of answers for a question (e.g. list of states, yes/no, etc.) that you will use each time you add this question to a survey.

When adding a question to a survey, you can always add or remove answers from that question, so it is not necessary to always add answers at to a specific question. Even questions that have a text field or text area for the consumer to answer must have at least one answer (text field) associated with them. If you do not have an answer associated with a question, there will be no means for a consumer to answer the question. This will be covered in more detail later in this section.

Press the **Add Answer** button on the **Edit Survey Question** page. This opens the **Add Survey Answer** pop-up window.

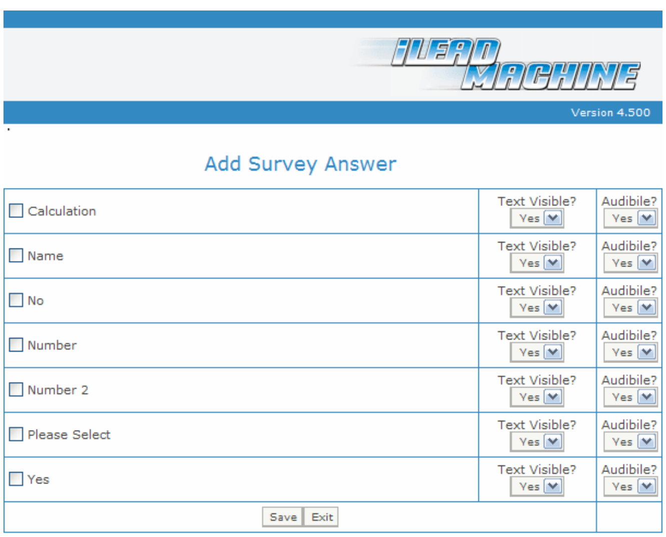


Figure 43 - Adding an Answer to a Question

You can add multiple answers to this question by selecting the checkbox to the left of each answer value in your library. For each answer selected, you can change the following properties (for this association)

- Text Visible? – indicates that the Answer name will be displayed on the survey form for this question. Visible answers are generally used for list boxes, checkboxes, and radio-buttons where there are multiple answer values the consumer must choose from. Text fields and text areas are generally left with non-visible answer values.
- Audible? – this is a future feature of the iLead Machine.

DELETING A QUESTION

Clicking on the Delete link in the Questions table on the **Manage Survey Questions** page deletes the Question in that row. You will be prompted with a confirmation page to verify that you wish to delete this Question.

WARNING: If you delete a Question currently associated with a question or survey, it will no longer be displayed on that survey form.

If you wish to delete the Question press the **Save** button. The Question will be deleted from the iLead Machine database and you will be returned to the **Manage Survey Questions** page.

If you press **Cancel** you will be returned to the **Manage Survey Questions** page without the Question being deleted.

Surveys

The iLead Machine allows you to create a library of Surveys. These survey are the forms through which leads are created.

MANAGING SURVEYS

The **Manage Surveys** page is accessed through the *Surveys>Manage Surveys* menu from the Navigation Bar.

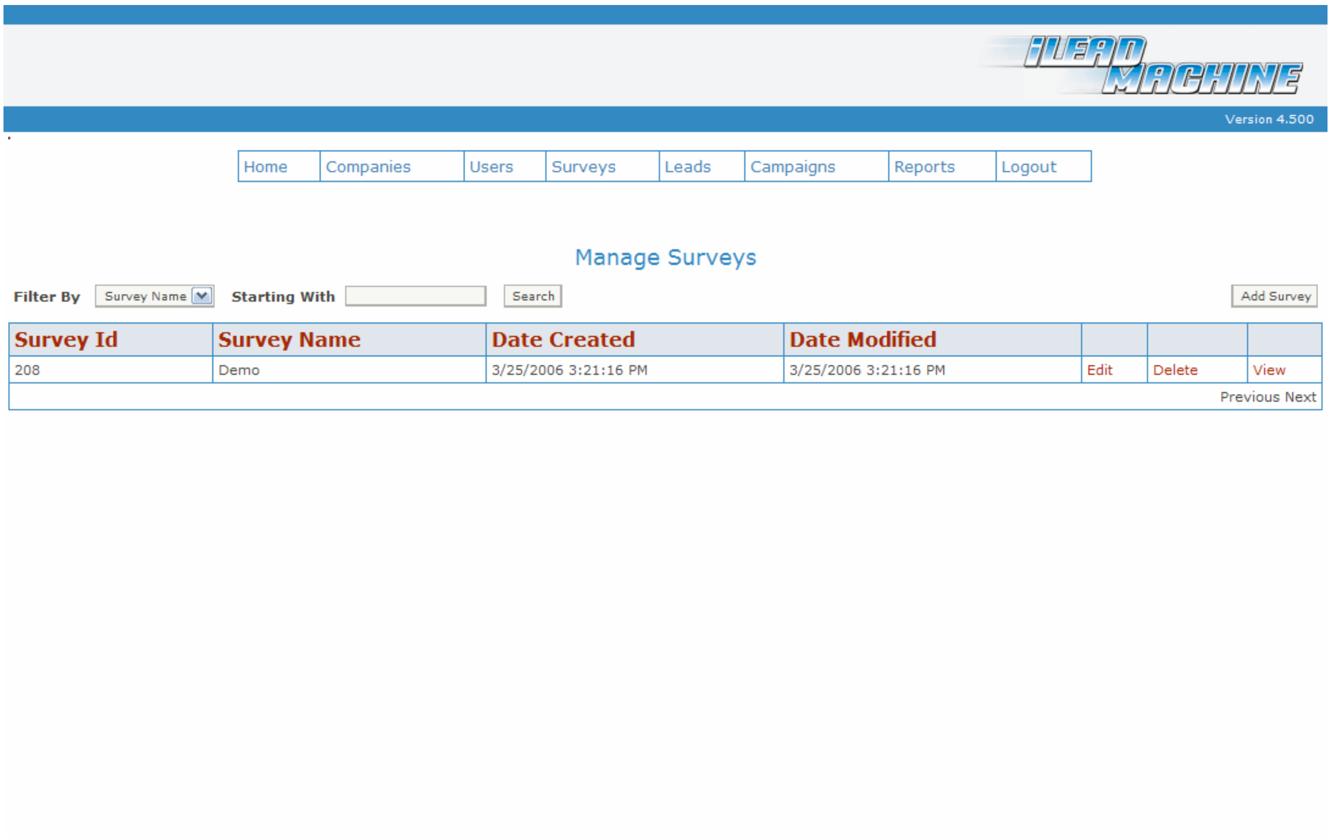


Figure 44 - Manage Surveys

The current list of Surveys is displayed with a default sort order on the Survey column. Clicking any of the Column header links changes the display to sort by that column. Clicking on the same Column header link inverts the sort order on the same column.

You can also use the **Filter By** drop-down list box to limit the display to records matching selected criteria. The available options for this page are:

- Survey Name

ADDING A SURVEY

Press the **Add Survey** button to display the **Edit Survey** page. This page is used not only to edit an existing Survey but also to create a new one.

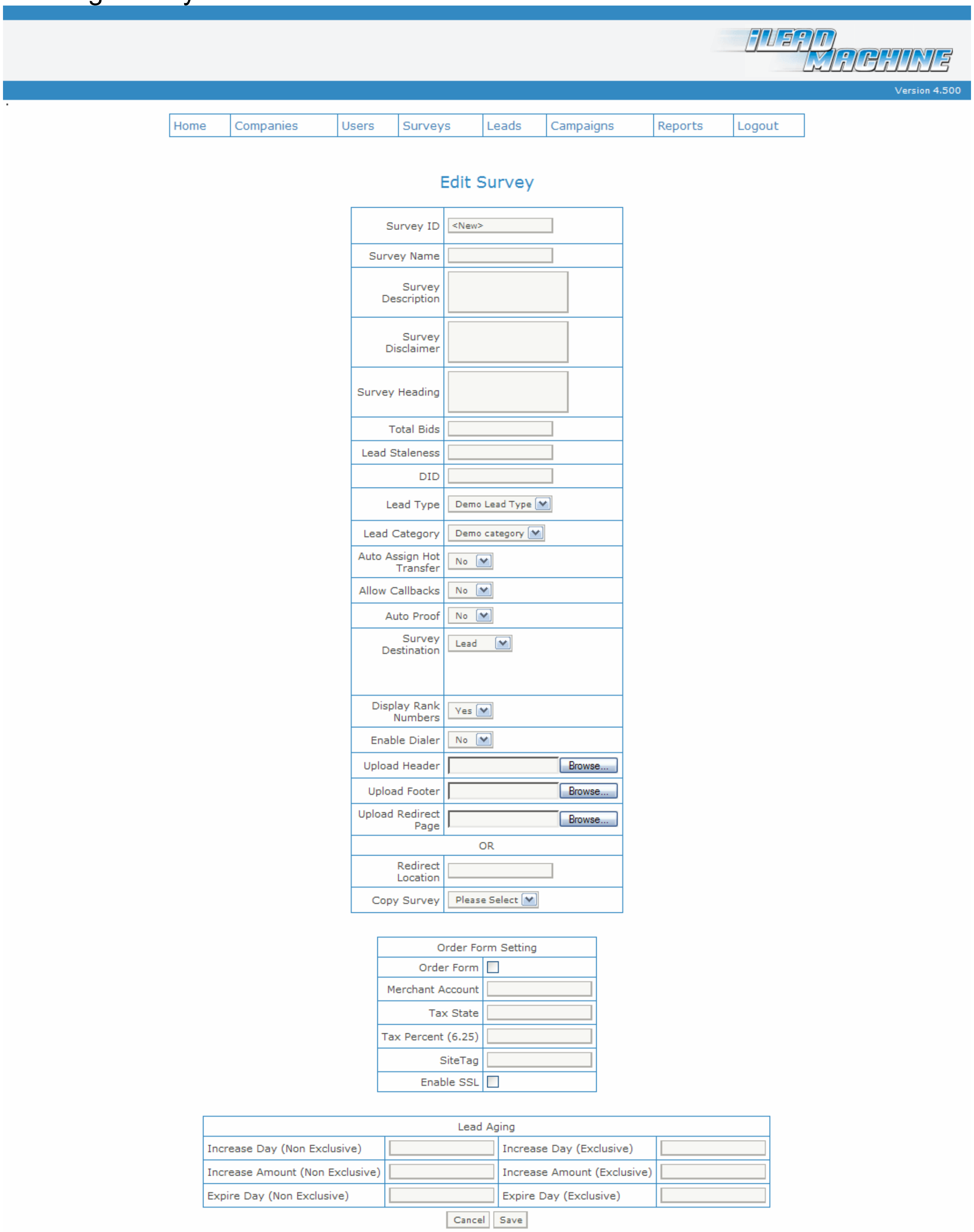


Figure 45 - Adding a Survey

Most pages in the iLead Machine Administrative Portal display an “ID” field. This is a non-editable field that identifies the record in the master iLead Machine Database. When you are creating a new Survey this field will display “<New>”.

There are a number of fields available when creating a new survey:

- Survey Name – enter the name of the Survey as you wish it to appear in the Administration Portal site
- Survey Description – enter a description of the survey, viewable only in the Administration Portal site (optional)
- Survey Disclaimer – enter disclaimer text that will appear above the **Submit** button on the survey form (optional)
- Survey Heading – enter a survey heading that will appear above the first question on the survey form (optional)
- Total Bids – enter the number of times that a lead from this survey can be distributed to an affiliate.
- Lead Staleness – enter the number of days after which an available lead becomes “stale” and will not be assigned to a new affiliate with a matching filter.
- DID - this is a future feature of the iLead Machine
- Lead Type – use the drop-down select box to identify the type of lead that will be created upon submission of the survey
- Lead Category – use the drop-down select box to identify the category of lead that will be created upon submission of the survey
- Auto-Assign Hot Transfer – use the drop-down select box to indicate whether a Hot Transfer lead should be automatically assigned to an affiliate or if it must be transferred first by a call center agent. Hot Transfer leads will be covered in a later section.
- Allow Callbacks - this is a future feature of the iLead Machine
- Auto Proof – indicate whether leads created by this survey must first be proofed by an administrator user or if they are automatically proofed and distributed.
- Survey Destination - this is a future feature of the iLead Machine
- Display Rank Numbers – indicate whether each question on the survey form should be displayed with a question number.
- Enable Dialer - this is a future feature of the iLead Machine
- Upload Header – enables you to upload a header file for this survey to change its appearance on the web
- Upload Footer - enables you to upload a footer file for this survey to change its appearance on the web
- Upload Redirect Page - enables you to upload a redirect page for this survey to displayed after the survey has been submitted
- Redirect Location – enables you to enter the URL of a redirect page that will be displayed after the survey has been submitted
- Copy Survey – use the drop-down list box to select an existing survey to copy when creating this survey. All questions and answers associated with the copied survey will be copied to this one
- Order Form Settings - this is a future feature of the iLead Machine

- Lead Aging - this is a future feature of the iLead Machine

Once you have completed all required fields, press the **Save** button. The Survey will be created in the iLead Machine database and you will be returned to the **Manage Surveys** page.

If you press **Cancel**, any information you entered will not be saved and you will be returned to the **Manage Surveys** page without the Survey being created.

EDITING A SURVEY

Clicking on the Edit link in the Surveys table on the **Surveys** page navigates to the **Edit Survey** page for the Survey in that row.

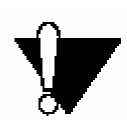
From here you can change any information (with the exception of the Survey ID, which is a read-only field) for this Survey. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and you will be returned to the **Manage Surveys** page.

You can also add questions to a survey, which will be covered in the next section.

If you press **Cancel**, any changes you made will not be saved and you will be returned to the **Manage Surveys** page without the Survey being modified.

DELETING A SURVEY

Clicking on the Delete link in the Surveys table on the **Manage Surveys** page deletes the Survey in that row. You will be prompted with a confirmation page to verify that you wish to delete this Survey.



WARNING: If you delete a Survey currently associated with a Survey or survey, it will no longer be displayed on that survey form.

If you wish to delete the Survey press the **Save** button. The Survey will be deleted from the iLead Machine database and you will be returned to the **Manage Surveys** page.

If you press **Cancel** you will be returned to the **Manage Surveys** page without the Survey being deleted.

Now that you have created your first survey you will add questions and answers to that survey. You will also learn to rank questions and answers on a survey and map the questions from a survey to a lead.

ADDING QUESTIONS

On the **Edit Survey** page, press the **Add Question** button. This opens the **Add Survey Question** pop-up window.

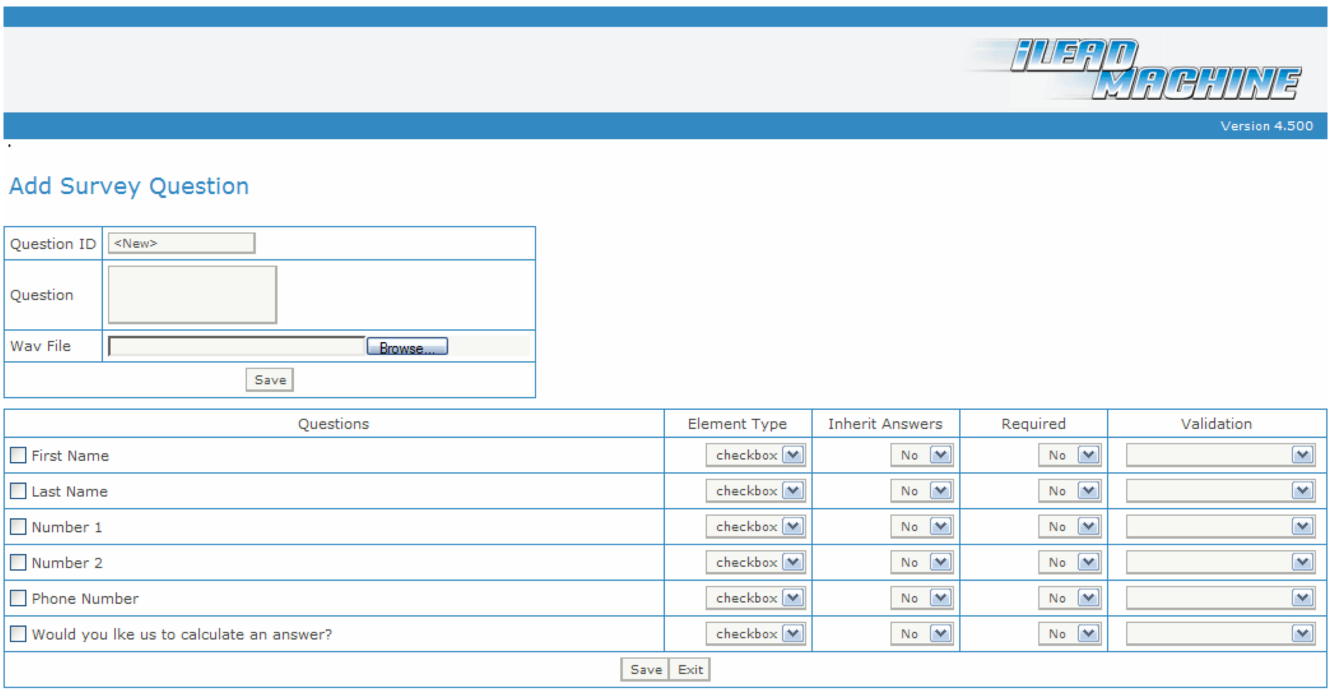


Figure 46 - Add Survey Question

The top area of the window enables you to create additional questions. The process for this is the same as creating new questions in your library (see section above). The main area of the page includes a list of all questions currently in the Question library that have not already been added to this survey.

You can add multiple questions to this survey by selecting the checkbox to the left of each question in your library. For each question selected, you can change the following properties (for this survey)

- Element Type – use the drop-down list box to select the format for this question on the survey. See Question Types below for more information on the options available.
- Inherit Answers – use the drop-down list box to indicate whether any answers associated with that question should be added to the survey as well. If you have followed the process above, you will most likely want to select **Yes**

- Required – use the drop-down list box to indicate whether answering this question is a requirement for submitting the survey and creating a lead. Required question are marked with a red asterisk on the survey form.
- Validation – use the drop-down list box to select a form of validation for a text field answer to this question. Options include:
  - Numeric – the answer to this question must include only digits 0 through 9
  - Phone Number – the answer to this question must include only digits 0 through 9 and must be 10 characters long
  - Zip Code – the answer to this question must include only digits 0 through 9 and must be 5 characters long
  - Email Address – the answer to this question must be in the format of a@b.c
  - Date – the answer to this question must be in the format of mm/dd/yyyy
  - Time – the answer to this question must be in the format of hh:mm:ss with am or pm
  - Social Security Number - the answer to this question must include only digits 0 through 9 and must be 9 characters long
  - Value Greater 50000 – the answer to this question must include only digits 0 through 9 and must be greater than 50000
  - Value Greater 2 – the answer to this question must include only digits 0 through 9 and must be greater than 2
  - Credit Card Number - the answer to this question must include only digits 0 through 9 and must be 16 characters long
  - Credit Card Exp Date – the answer to this question must be in the format of mm/yyyy

Questions are added in alphabetical order (within the group) by default. Later questions will be added to the end of the survey. Each question is displayed with the associated answers to the right. Required questions are indicated by a (Required Question) text in red below the Question name.

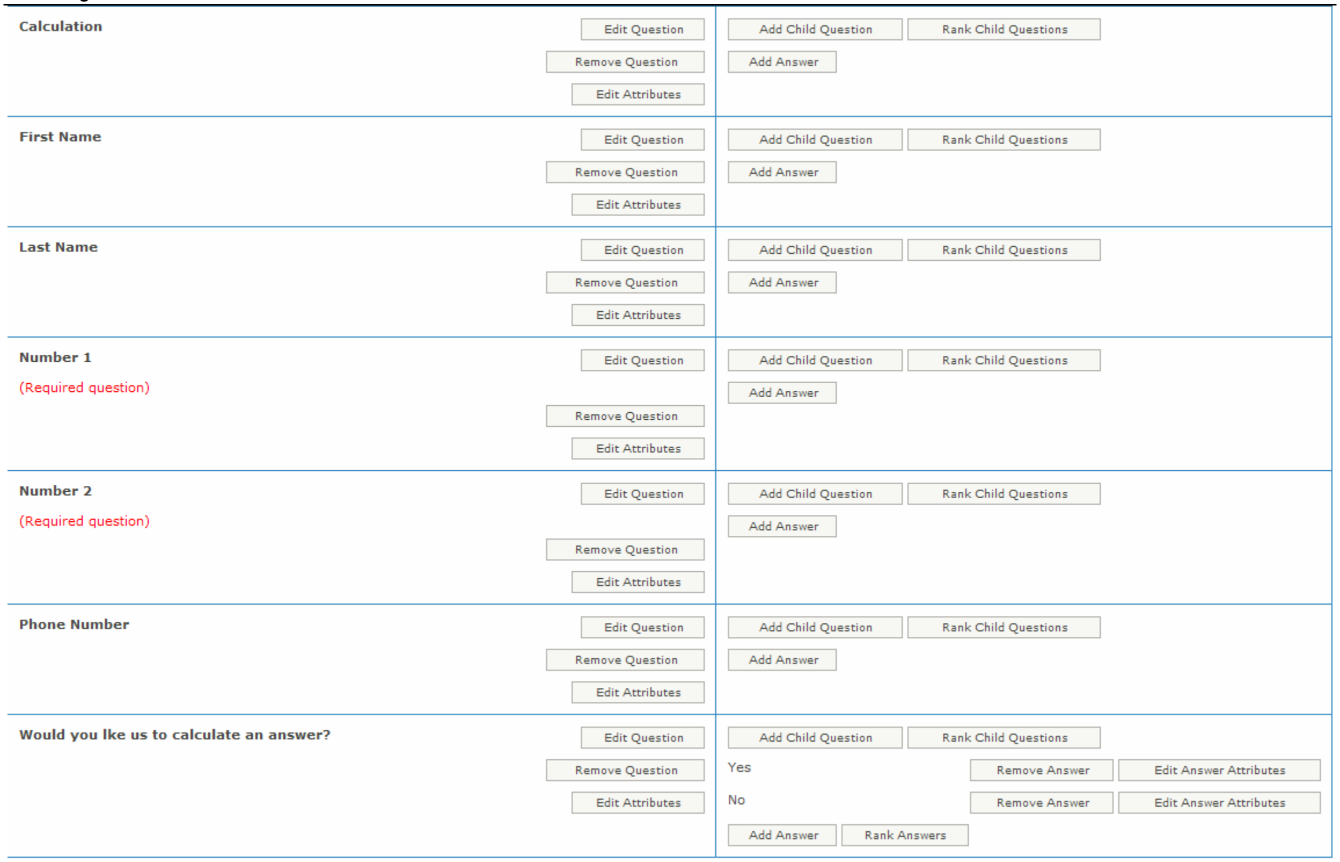


Figure 47 - Survey Questions

EDITING A QUESTION

Pressing the **Edit Question** button opens the **Edit Survey Question** page for that question.

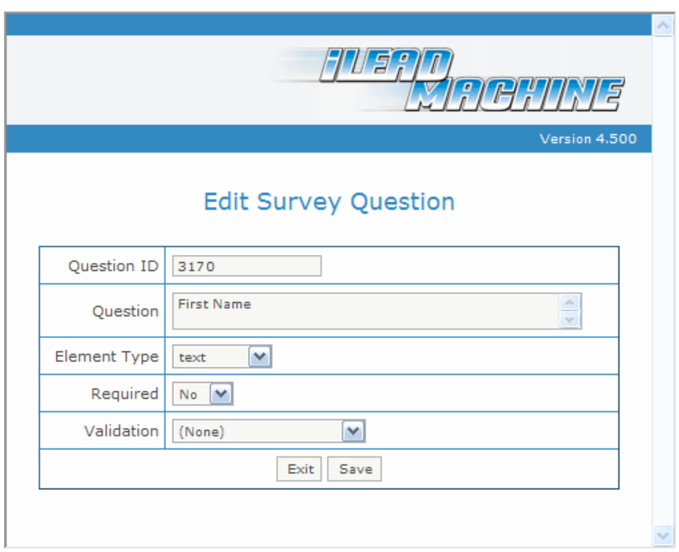


Figure 48 - Editing Question Properties

From here you can change any information for this question on this survey.. Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and the pop-up window will be closed.

If you press **Cancel**, any changes you made will not be saved and the pop-up window will be closed.

EDITING QUESTION ATTRIBUTES

Pressing the **Edit Attributes** button opens the **Edit Question Attributes** page for that question.

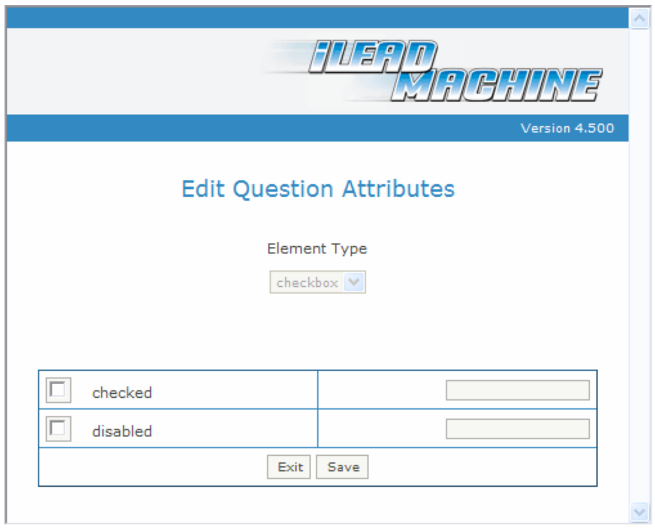


Figure 49 - Question Attributes

From here you can change attributes for this question. The attributes that you can modify depend on the type of question (e.g. checkbox, text, select). Once you have made all changes, press the **Save** button. The changes will be saved in the iLead Machine database and the pop-up window will be closed.

If you press **Cancel**, any changes you made will not be saved and the pop-up window will be closed.

REMOVING A QUESTION

Pressing the **Remove Question** button removes the Question from this survey. You will be prompted with a confirmation page to verify that you wish to remove this Question.

If you wish to remove the Question press the **Save** button. The Question will be removed from this survey and the **Edit Survey** page will be refreshed.

If you press **Cancel** you will be returned to the **Edit Survey** page without the Question being removed.

Question Types

The iLead Machine allows you to add a variety of questions to a survey form. These include the following:

Checkbox

Checkbox questions are displayed with each answer attached next to a checkbox that can be selected by the consumer. The answers are displayed in separate rows and the order can be changed by ranking the answers (see below). More than one answer can be selected for a checkbox question.

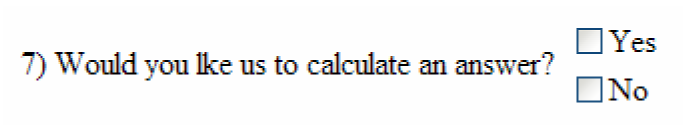


Figure 50 - Sample Checkbox Question

File

File questions allow the user to browse to a file location on their computer and upload the file. This is a future feature of the iLead Machine.

Hidden

Hidden questions are not displayed on the survey form to the consumer. These are used to add questions that should be stored on the "back-end" of the lead, such as calculations.

Label

Label questions are used for column headings or section dividers. These are questions with no answer values or answer fields attached.

Password

Password questions are used for entering data that should not be displayed on the screen, such as a password. While the consumer enters their answer, each character is masked.

Figure 51 - Sample Password Question

RADIO

Radio questions are displayed with each answer attached next to a radio button that can be selected by the consumer. The answers are displayed in separate rows and the order can be changed by ranking the answers (see below). Only one answer can be selected for a radio question.

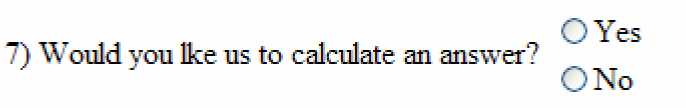


Figure 52 - Sample Radio Question

SELECT

Select questions are displayed with each answer listed in a list box. The answers are displayed in separate rows and the order can be changed by ranking the answers (see below).

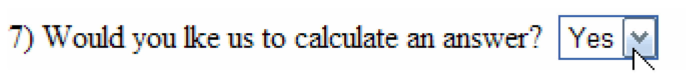


Figure 53 - Sample Select Question

By editing the attributes of a Select Question, you can make change the display from a drop-down list box to an order list box. This is done by selecting the “Multiple” attribute in the **Edit Question Attributes** pop-up window.

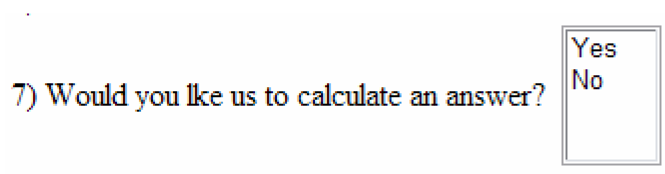


Figure 54 - Sample Order List Box Question

TEXT

Text questions are displayed with a text field next to the question. You can attach multiple text fields to a single text question by adding multiple answers to that question. Normally you will want to have the answer for a text question “Not Visible” (set at the time you add the answer to the question).

Figure 55 - Sample Text Question

TEXT AREA

Text area questions are displayed with a large text area field next to the question. You can attach multiple text fields to a single text area question by adding multiple answers to that question. Normally you will want to have the answer for a text area question "Not Visible" (set at the time you add the answer to the question).

Figure 56 - Sample Text Area Question

CHILD QUESTIONS

Child questions are displayed indented below a parent question. This is used often if you have a question that is a follow up to a previous question. Child questions and their answers are added by pressing the **Add Child Question** button to the right of a Question. Child questions follow the same procedures as normal (parent) Survey Questions.

ADDING ANSWERS

While careful planning of your survey will give you the ability to inherit answers for all of the questions that you add to your survey, you may need to add additional answers at a later time. Press the **Add Answer** button to the right of a question to open the **Add Answer** pop-up window.

Figure 57 - Add Answer

This process is the same as adding an answer to a question on the **Edit Survey Question** page. Answers may be ranked by pressing the **Rank Answers** button. This process is detailed below in the **Ranking Questions** section.

Answer attributes may be set by pressing the **Edit Answer Attributes** button. Setting answer attributes is the same process as setting Question attributes, however, answer attributes will always supersede any question attributes that may be set.

RANKING QUESTIONS

Ranking questions on your survey allows you not only to change the order of the questions as they appear on the survey form, but also to split your survey into multiple pages or multiple columns. Pressing the **Rank Questions** button opens the **Rank Questions** pop-up window.

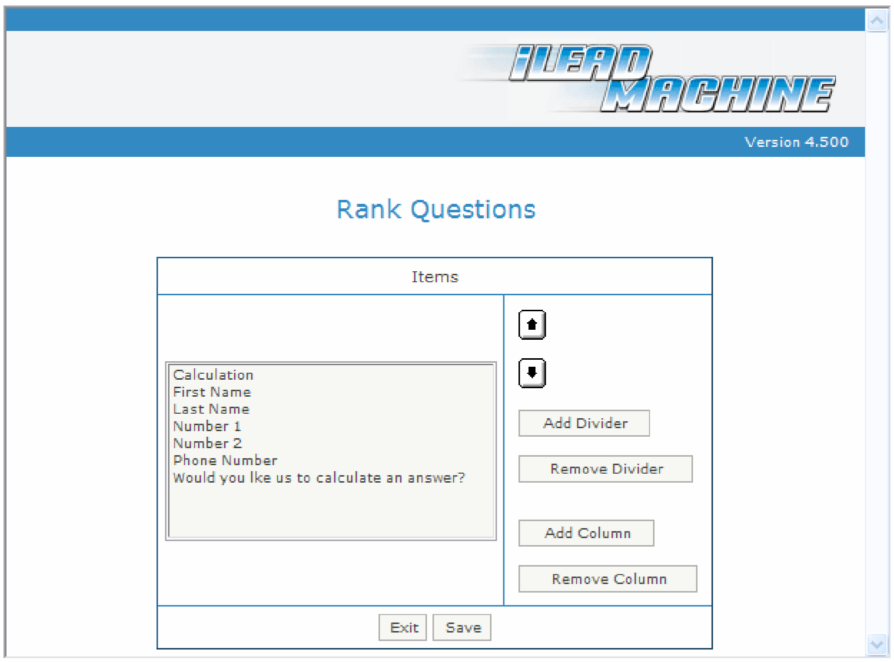


Figure 58 - Ranking Questions

To change the ranking of a question, select it from the Order List Box and press the up or down arrow button to move it in the list.

Press the **Add Divider** button to add a page divider in between two questions. This will be displayed as ---- PD ---- and represents a page break in the survey. In place of the **Submit** button, a **Next** button will be displayed. You may remove the page break by selecting the ---- PD --- and pressing the **Remove Divider** button.

NOTE: All required questions on a page must be completed before moving to the next page of a survey.

Press the **Add Column** button to signify a column break between two questions. This will be displayed as ---- Column ---- and represents a column break in the survey. You may remove the column break by selecting the ---- Column --- and pressing the **Remove Column** button.

When you have finished ranking the questions, press the **Save** button. The ranking will be saved and the **Edit Survey** page will be refreshed.

If you press **Cancel** you will be returned to the **Edit Survey** page without the ranking being saved.

MAPPING QUESTIONS

Pressing the **Map Questions** button opens the **Map Questions** pop-up window.

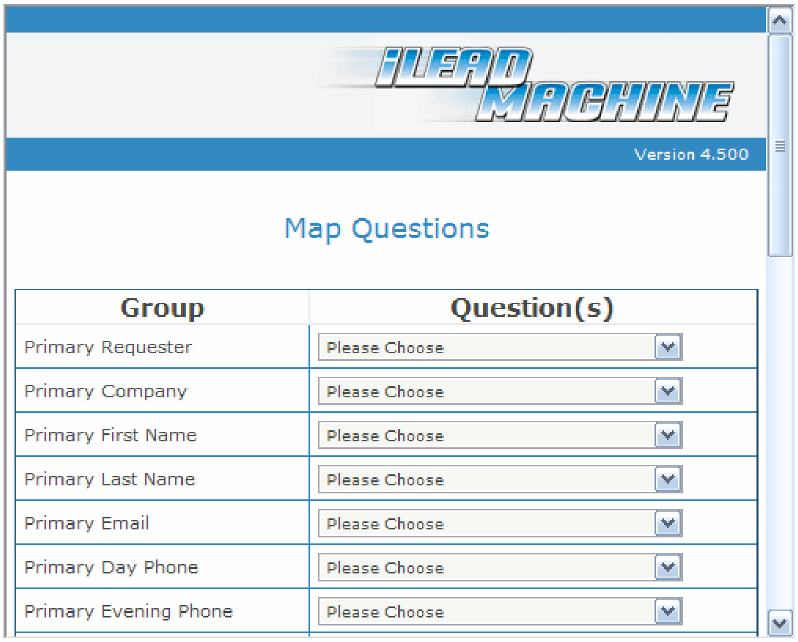


Figure 59 - Mapping Questions

Mapping questions allows you to identify specific question on your survey with a specific "purpose". Most of this is for a future feature of the iLead Machine. There are three cases in which you will want to map questions on your survey.

- Primary Requester – use the drop-down list box to select a question to represent the "Requester" of the lead. This is displayed in both the Administrative Portal and the Affiliate Portal when viewing the table of leads.
- Primary Email – use the drop-down list box to select a question to represent the Email address for the lead applicant. Any emails that may be sent to the lead requester (consumer) will be sent to this email address.
- Public Questions – use the list order box at the bottom of the **Map Questions** pop-up window to select all questions that will be displayed when the Affiliate views the lead.

When you have finished mapping the questions, press the **Save** button. The mapping will be saved and the **Edit Survey** page will be refreshed.

If you press **Cancel** you will be returned to the **Edit Survey** page without the mapping being saved.

VIEWING A SURVEY

Clicking on the View link in the Surveys table on the **Manage Surveys** page opens the survey in a new browser window.

The version of the survey that will be displayed is identical to the one that will be viewed by the consumer. The default URL for a survey is:

[domain]/survey/survey.aspx?iSurveyid=[survey ID]

Example:

http://demo.ileadmachine.promero.com/survey/survey.aspx?iSurveyid=208

PREVIEWING AND PUBLISHING A SURVEY

Changes you make to your survey form are not done in a "live" manner. This would cause issues if you made changes to a survey form as consumers were viewing it. Any changes you make must be published.

Press the **Publish** button on the **Edit Survey** page to publish your survey. Publishing the survey pushes any changes you have made to be viewable by consumers. It also saves the HTML code of the survey page so that it loads faster for the consumer.

As you make more changes to your survey, you may want to preview those changes before publishing the survey. Press the **Preview** button the **Edit Survey** page to open a preview copy of the survey in a new browser window.

Review and Exercises

Now that you have finished this chapter, you should be able to:

- ✓ Create and understand Answers and Answer Types
- ✓ Create Questions and Associate Answers
- ✓ Create and modify Survey properties
- ✓ Add questions to Surveys and understand the various Question types
- ✓ Map questions and answers to leads

Exercises:

1. Create a set of answers in your library
2. Create a set of questions and associate answers with them
3. Create a survey
4. Add questions and answers to your survey

Chapter 6: Filters and Leads

This chapter covers the creation of filters. Filters are used to attribute incoming leads to Publishers and to assign leads to Affiliates. Before adding a filter to a Publisher or an Affiliate, it is useful to write out the filter on paper as an expression.

Also covered in this chapter is the procedure for purchasing lead allotments for an Affiliate and tracking Monthly Payments.

Objectives

After completing this chapter you will be able to:

- ✓ Create Publisher filters
- ✓ Create Affiliate filters
- ✓ Purchase Lead Allotments
- ✓ Track Monthly Payments

Publisher Filters

Publisher filters are used to determine which publisher should be credited with a lead. This is generally done based on either a parameter added to the end of the URL of the survey or by an entire URL string. It is also possible to credit an entire survey to a single publisher.

ADDING PUBLISHER FILTERS

Press the Supplemental Page button on the **Edit Publisher** page. This opens the **Edit Filter** pop-up window.

Figure 60 - Add Filter (Publisher)

Press the **Insert** button to add a new line into the Publisher Filter above the current line. Press the **Add** button to add an additional line beneath the last line of the Filter. Each expression line includes the following options:

- NOT – select this checkbox if you are going to place a “NOT” in the filter expression for this line. (e.g. Parameter NOT “internal”)
- (- use the drop-down list box to add 1 to 4 open parentheses to your filter expression before this line. This is used for grouping.
- Criteria – use the drop-down list box to select the filter criteria for this line of the expression. Choices include:
  - New Parameter – displays a text field for entering a new parameter. This parameter is then available from the drop-down list box when you set criteria to Existing Parameter
  - Existing Parameter – displays a second drop-down list box allowing you to select a parameter for this line of the filter expression. An additional

    drop-down list box is then displayed for the operator, and then a text field for the value of this parameter. Operators include:
        - <= - less than or equal to the value supplied
        - < - less than the value supplied
        - = - equal to the value supplied
        - >= - greater than or equal to the value supplied
        - > - greater than the value supplied
        - In – in a list of specified values. These values must be entered between single quotes and separated by commas
        - Like – similar to the specified value, usually with a wildcard character of % (e.g. like publisher%)
    - New Referrer – displays a text field for entering a new referring URL. This referrer is then available from the drop-down list box when you set criteria to Existing Referrer.
    - Existing Referrer – displays a second drop-down list box allowing you to select a referrer for this line of the filter expression.
    - Survey – displays a second drop-down list box allowing you to select a survey for this line of the filter expression.
-) - use the drop-down list box to add 1 to 4 open parentheses to your filter expression before this line. This is used for grouping.
- And/Or – adds an AND or OR to the end of this line of the expression

The number of open and closed parentheses of your filter must match and there must be an AND or OR between each line of your filter expression.

An example publisher filter is shown below for agentFirstName=John and either kw=one or kw=publisherone.

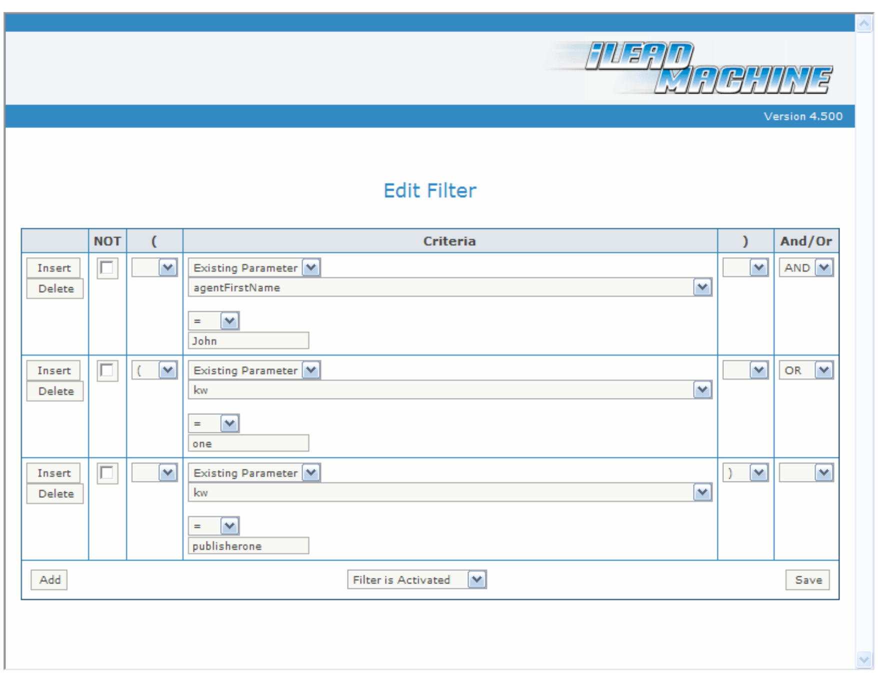


Figure 61 - Sample Publisher Filter

Notice the parentheses grouping the second and third “OR” terms. Without the parentheses, the filter would actually be Agent First Name= John AND kw=one, OR kw=publisherone. The difference is in the grouping and can be important as the iLead Machine assigns credit for referring the lead.

When you have finished building the filter you must set the last drop-down list box to “Filter is Activated”. If the filter is not activated, no leads will be credited to this publisher.

After activating the filter, press the **Save** button. The filter will be saved and the **Edit Filter** page will be closed.

If you press **Cancel** the **Edit Filter** page will be closed without the filter being saved.

ADDING SURVEY ASSIGNMENTS

The last step in crediting a publisher with a lead is to assign that survey to the Publisher. Press the **Add Surveys** button on the **Edit Publisher** page. This opens the **Publisher Survey** pop-up window.

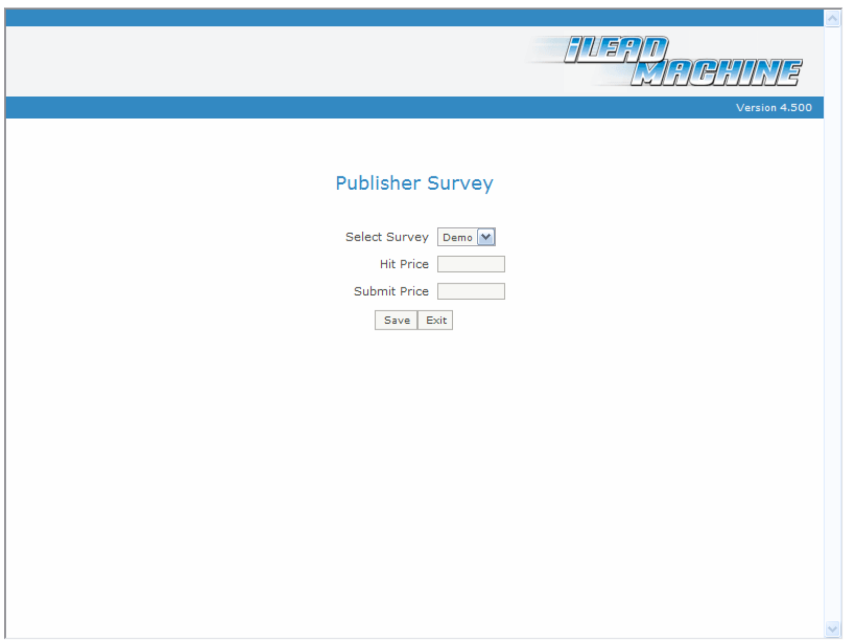


Figure 62 - Publisher Survey

Select a survey from the drop-down list box. For that survey you can set the following payout parameters:

- Hit Price – enter the price you have agreed to pay this publisher for each survey “hit” they refer. A survey hit is generated each time the survey page is opened.
- Submit Price – enter the price you have agreed to pay this publisher for each survey submission they refer. A survey submission is generated each time a consumer completes and submits a survey.

Affiliate Filters

Affiliate filters are used to determine which Affiliate should receive a given lead. Lead distribution will be covered in the next section. Affiliate filters generally are based on answers to one or more questions on a survey, but can also be based on lead types or lead categories.

ADDING AFFILIATE FILTERS

Press the Supplemental Page button on the **Edit Affiliate** page. This opens the **Edit Filter** pop-up window.

Figure 63 - Add Filter (Affiliate)

Press the **Insert** button to add a new line into the Affiliate Filter above the current line. Press the **Add** button to add an additional line beneath the last line of the Filter. Each expression line includes the following options:

- NOT – select this checkbox if you are going to place a "NOT" in the filter expression for this line. (e.g. Parameter NOT "internal")
- (- use the drop-down list box to add 1 to 4 open parentheses to your filter expression before this line. This is used for grouping.
- Criteria – use the drop-down list box to select the filter criteria for this line of the expression. Choices include:
  - Lead Type – displays a second drop-down list box allowing you to select an existing Lead Type.
  - Lead Category – displays a second drop-down list box allowing you to select an existing Lead Category.

    - Survey: [surveyname] – displays a second drop-down list box allowing you to select a Survey Question for the displayed survey. An additional drop-down list box is then displayed for the operator, and then a text field for the answer to this question. Operators include:
        - <= - less than or equal to the value supplied
        - < - less than the value supplied
        - = - equal to the value supplied
        - >= - greater than or equal to the value supplied
        - > - greater than the value supplied
        - In – in a list of specified values. These values must be entered between single quotes and separated by commas
        - Like – similar to the specified value, usually with a wildcard character of % (e.g. like Affiliate%)
-) - use the drop-down list box to add 1 to 4 open parentheses to your filter expression before this line. This is used for grouping.
- And/Or – adds an AND or OR to the end of this line of the expression

The number of open and closed parentheses of your filter must match and there must be an AND or OR between each line of your filter expression.

An example Affiliate filter is shown below for “Calculation” greater than 10 OR Phone Number like 954% (in the 954 area code).

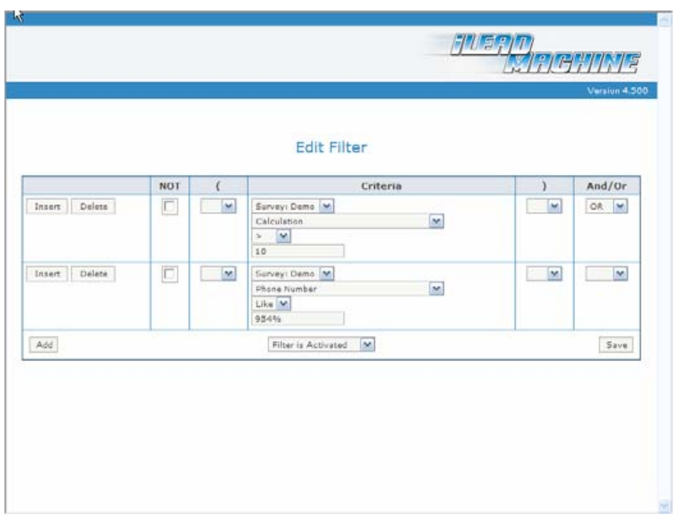


Figure 64 - Sample Affiliate Filter

When you have finished building the filter you must set the last drop-down list box to “Filter is Activated”. If the filter is not activated, no leads will be assigned to this Affiliate.

After activating the filter, press the **Save** button. The filter will be saved and the **Edit Filter** page will be closed.

If you press **Cancel** the **Edit Filter** page will be closed without the filter being saved.

Lead Purchasing and Payments

Depending on the Affiliate Type, you will either need to purchase an allotment of leads or enter a payment made by the Affiliate to reconcile the money that you are owed. These operations are performed through the **Edit Affiliate** page.

On the **Edit Affiliate** page, press the **Leads** Supplemental Page Button. This opens the **Affiliate Lead** pop-up window.

On this page you can perform the following accounting operations:

- Credit – allows you to credit a specific lead back to an Affiliate. It is not advised that you credit leads back in this manner, but rather that you use the Return Leads process covered in a later section.
- Allotment Purchase – allows you to make a purchase of leads for an Affiliate. This will be covered below.
- Monthly Payment – allows you to record a payment for leads received by an Affiliate in a specified date range. This will be covered below.
- Refund Allotment – allows you to refund remaining leads purchased by an Affiliate. It is not advised that you refund leads in this manner.

Allotment Purchase

Select "Allotment Purchase" from the drop-down list box and press the **Manage** button.

Figure 65 - Purchase Allotment

The following must be specified:

- Allotment Amount – enter the number of leads to be purchased by the Affiliate
- Allotment Price – enter the price the Affiliate has paid for this allotment of leads. This will be used to calculate the Lead Price on later reports for this Affiliate.

After entering the data, press the **Purchase Allotment** button. The leads will be added to the Affiliate's Lead Allotment.

MONTHLY PAYMENT

Select "Monthly Payment" from the drop-down list box and press the **Manage** button.

Figure 66 - Monthly Payment

The following must be specified:

- Begin date – enter the start date for the date range for which the Affiliate has made a payment. You can use the Calendar tool or enter the date manually in the mm/dd/yyyy format.
- End date – enter the end date for the date range for which the Affiliate has made a payment. You can use the Calendar tool or enter the date manually in the mm/dd/yyyy format.
- Price – enter the price the Affiliate has paid for lead received during this date range.

After entering the data, press the **Monthly Payment** button. The payment will be added to the transaction history of this Affiliate.

Review and Exercises

Now that you have finished this chapter, you should be able to:

- ✓ Create Publisher filters
- ✓ Create Affiliate filters
- ✓ Purchase Lead Allotments
- ✓ Track Monthly Payments

Exercises:

1. Create a filter for an existing Publisher
2. Create a filter for an existing Affiliate
3. Purchase an Allotment for an Affiliate of type “Pay in Advance – Renew Allotment”
4. Track a Payment for an Affiliate of type “Monthly Payment”

Chapter 7: Leads

This chapter covers the Lead Assignment process. You will learn about Hot Transfer leads, Exclusive leads and Standard Leads. You will also learn how an affiliate can view his leads, request returns, and request promotion fulfillment. Finally, you will learn how an Administrator can process these lead return requests and promotion fulfillments.

Objectives

After completing this chapter you will be able to:

- ✓ Find a lead in the iLead Machine
- ✓ Distinguish between Standard, Exclusive, and Hot Transfer leads
- ✓ View a lead in the Affiliate Portal
- ✓ Complete the Lead Return process
- ✓ Complete the Promotion Fulfillment process

The Lead Assignment Process

When a consumer completes an iLead Machine survey, a new Lead is created. This lead then moves through the Lead Assignment Process. The hierarchy for assigning leads is shown below:

- Internal Affiliates
- Hot Transfer
- Exclusive Leads
- Standard Leads

Internal affiliates are generally members of your organization who wish to be copied on all leads for internal auditing. You should remember from the section on Affiliates that an internal user is assigned every lead matching his filter. This lead assignment does not count against the Bid Count, or the maximum number of times the lead may be assigned from a survey.

Once all Internal Affiliates have received the lead, the next check is for Affiliates who accept Hot Transfer Leads.

HOT TRANSFER LEADS

A Hot Transfer lead is one that includes a customer transferred live on the phone to the Affiliate at the same time that the lead is sent. Hot Transfer leads are generally entered by a Call Center agent. As you would not want your consumer to be presented with a Hot Transfer lead screen, the URL for the survey must contain an extra parameter. For example, the survey URL http://demo.ileadmachine.promero.com/survey/survey.aspx?iSurveyid=208 will generate a normal lead, but http://demo.ileadmachine.promero.com/survey/survey.aspx?iSurveyid=208**&bHotTransfer=1** will generate a Hot Transfer lead.

If the extra parameter (bHotTransfer=1) is recognized on the survey hit, then the submission process is altered. The iLead Machine will search for any Affiliates who accept Hot Transfer leads (i.e. have the Hot Transfer drop-down list box set to “True”). If any are found, an additional screen is displayed based on the survey settings.

If you selected “True” for the Auto Assign Hot Transfer drop-down list box (when building your survey), the lead will be sent to the next Affiliate in the queue and a confirmation screen will be displayed.

Figure 67 - Auto Assign Hot Transfer

The Affiliate’s name and Company are displayed, along with the phone number to which the agent should transfer the call. The lead information is displayed as well so that the agent can pass any of this along when they introduce the call. All lead information will be included in the lead email and Affiliate Portal site.

If you selected “False” for the Auto Assign Hot Transfer drop-down list box (when building your survey), the lead will not be automatically assigned and sent to the Affiliate. Instead, the agent will be presented with the same information, but will have to disposition the lead based on the result of the call.

The three options are:

- Transferred – selecting the Transferred Radio Button assigns the lead to the Affiliate displayed
- No Answer – selecting the No Answer Radio Button indicates that this Affiliate did not answer the call. If there is another Affiliate accepting Hot Transfer leads (with a filter that matches this lead), that Affiliate’s information will be displayed and the process can be repeated. If there is no other Affiliate that can accept this lead, the lead will be sent to the first Affiliate in rotation (with a matching filter) that did not answer the call.

- Rejected – selecting the Rejected Radio Button indicates that this Affiliate rejected this lead (for whatever reason). The lead will be assigned as a Standard lead to the next affiliate in rotation.

NOTE: Affiliates may be configured to accept Hot Transfer leads or Standard leads, but not both. An Affiliate configured to accept Hot Transfer leads will never be assigned a lead that did not originate from a survey URL with the bHotTransfer parameter.

Standard and Exclusive Leads

If there are no Affiliates accepting Hot Transfer leads (with a filter that matches this lead), or if the bHotTransfer parameter is not included in the survey URL, the iLead Machine will find all Affiliates that have a filter that matches the lead. The list will be ordered based on the date of the last lead assignment (creating a round-robin rotation).

Any Affiliates configured to accept Exclusive Leads (i.e. have the Exclusive Leads drop-down list box set to “True”) will be ranked above those Affiliates who are not. This is to give those Affiliates who have contracted for Exclusive Leads first priority (since they cannot be assigned a lead once it has been assigned to another affiliate).

Viewing and Editing Leads

Now that you have leads generated by your survey, you can view the details of those leads in the Administrative Portal site. If you know the Lead ID, you can search for it individually. Otherwise you can sort through a list of Available or Used Leads.

Finding a Lead

Often, you will know the Lead ID for a specific Lead and wish to view or edit the information associated with that lead. You can use the **Find Lead** page to locate the lead.

The **Find Lead** page is accessed through the *Leads>Find Lead menu* from the Navigation Bar.

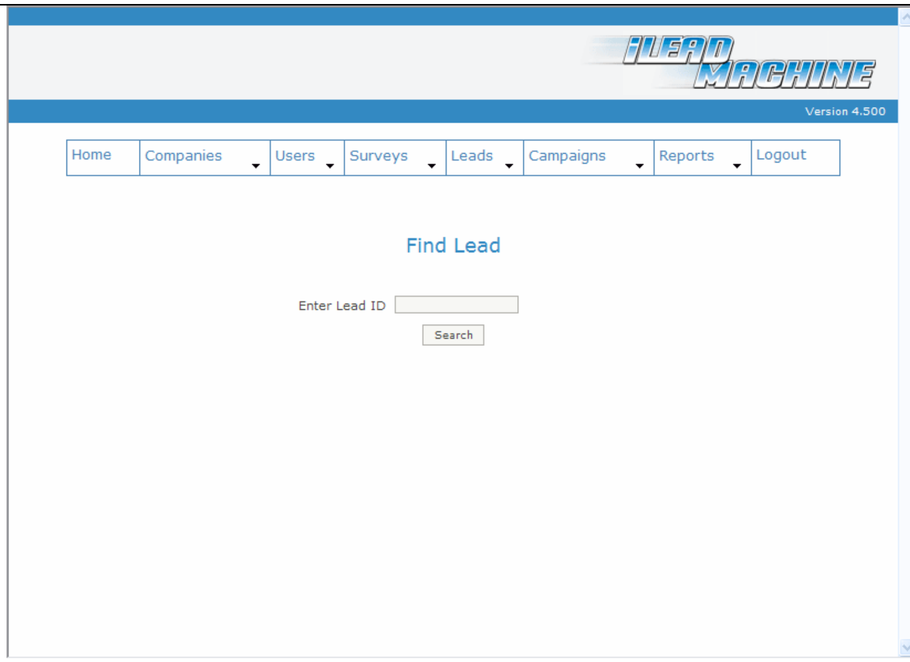


Figure 68 - Find Lead

Enter the Lead ID in the text field and press the **Search** button. The **Edit Lead** page will be displayed with the lead details for that lead. The **Edit Lead** page is covered in the next section.

AVAILABLE AND USED LEADS

Leads fall into one of two categories: Available and Used. Available leads are those leads that have been assigned fewer times than the Bid Count on the survey from which they were generated. Used leads are those leads that have been assigned the maximum number of times (equal to the Bid Count on the survey from which they were assigned). You can view the table of leads under from the appropriate **Manage Leads** page. For this example, we will look at Available Leads as the functionality is the same.

MANAGING AVAILABLE LEADS

The **Manage Available Leads** page is accessed through the *Leads>Manage Available Leads menu* from the Navigation Bar.

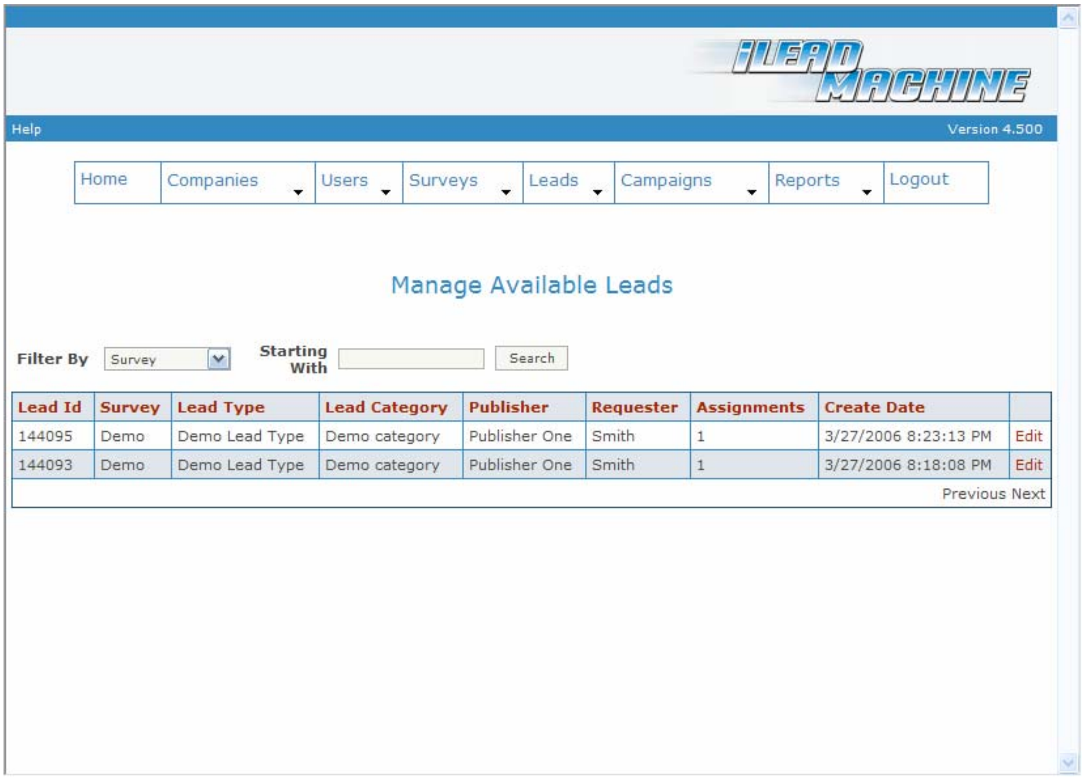


Figure 69 - Manage Available Leads

The **Manage Available Leads** page displays the following information for each lead in the table:

- Lead ID – the ID for this Lead. Each Lead in the iLead Machine is assigned a unique Lead ID. This is not company-specific so you will see gaps in the Lead ID numbers.
- Survey – the Survey from which this lead was generated
- Lead Type – the Lead Type with which this Lead is associated. The Lead Type will determine valid Lead Dispositions, Return Reasons, and Promotions.
- Lead Category – the Lead Category with which this Lead is associated.
- Publisher – if the lead was referred by a Publisher (based on filter), the Publisher Name will be displayed
- Requester – displays the answer to the Survey Question that was mapped to “Primary Requester” on the **Map Questions** page.
- Assignments – displays the number of times this Lead has been assigned to Affiliates.
- Create Date – displays the date and time at which this Lead was submitted.

EDITING A LEAD

Clicking on the Edit link in the Leads table on the **Manage Available Leads** page navigates to the **Edit Lead** page for the lead in that row. Each Question and Answer for this Lead are displayed.

Figure 70 - Edit Lead

CAUTION: As an Administrator, you can change the answer to any Survey Question for this lead. While this will not send a new email to any Affiliates who have been assigned the lead, it will alter the Lead in the database and in the Affiliate Portal site.

ASSIGNING LEADS

Any Affiliates who have been assigned this lead will be displayed, and you can manually assign this lead to another Affiliate by pressing the **Assign** button. This opens the **Assign Affiliate** page.

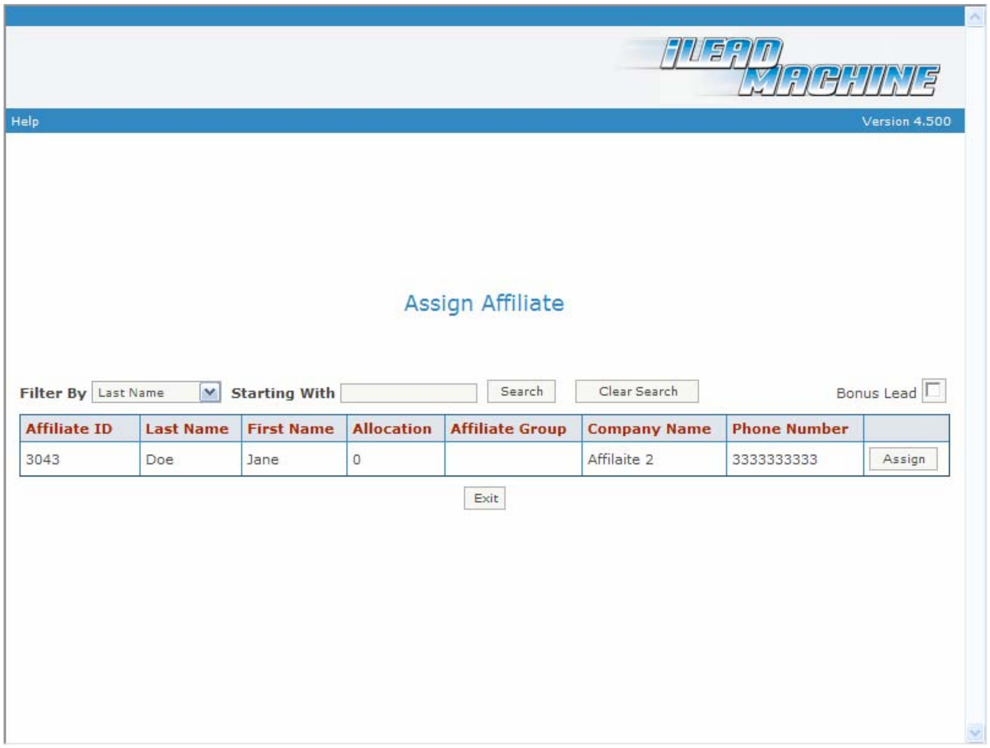


Figure 71 - Assign Affiliate

All Affiliates that do not currently have this lead assigned to them will be displayed. Pressing the **Assign** button will assign this lead to the affiliate in that row. You can assign a lead in this manner up to or above the Bid Count for the lead.

Selecting the Bonus Lead checkbox will assign the lead without debiting the Affiliate's Lead Allocation.

Lead Delivery

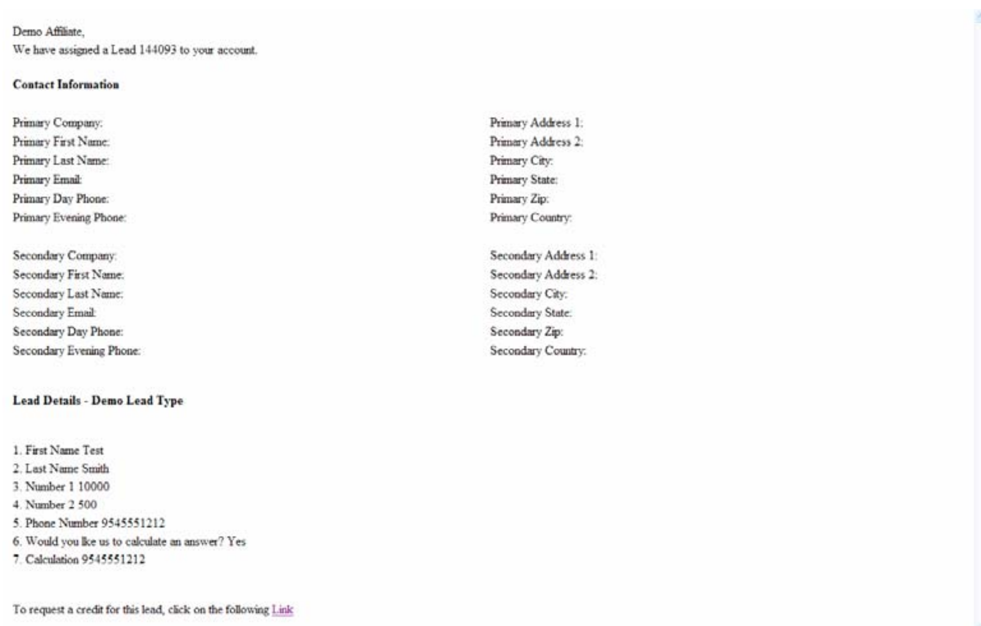
All Leads assigned to an Affiliate can be viewed in the Affiliate Portal site. In addition, the Affiliate can receive the lead in one of three email formats.

LEAD EMAILS

There are three types of email Leads available to an Affiliate. These are set by selecting "True" on the appropriate drop-down list box on the **Edit Affiliate** page. If more than one list box is set to "True" then the Affiliate will receive more than one email for each Lead assigned.

LEAD INFO

The Lead Info email is sent to the Affiliate when the Lead is assigned. This email has a subject line of "Affiliate Program – Assigned Leads" and the body of the email contains all mapped questions from the survey as well as the Lead ID.



Demo Affiliate,
We have assigned a Lead 144093 to your account.

Contact Information

Primary Company:
Primary First Name:
Primary Last Name:
Primary Email:
Primary Day Phone:
Primary Evening Phone:

Primary Address 1:
Primary Address 2:
Primary City:
Primary State:
Primary Zip:
Primary Country:

Secondary Company:
Secondary First Name:
Secondary Last Name:
Secondary Email:
Secondary Day Phone:
Secondary Evening Phone:

Secondary Address 1:
Secondary Address 2:
Secondary City:
Secondary State:
Secondary Zip:
Secondary Country:

Lead Details - Demo Lead Type

1. First Name Test
2. Last Name Smith
3. Number 1 10000
4. Number 2 500
5. Phone Number 9545551212
6. Would you lke us to calculate an answer? Yes
7. Calculation 9545551212

To request a credit for this lead, click on the following Link

Figure 72 - Lead Info Email

LEAD LINK

The Lead Link email is sent to the Affiliate when the Lead is assigned. This email has a subject line of "Affiliate Program – Assigned Leads" but the body of the email only includes a notification that a lead has been assigned and a link to the Affiliate Portal site.

LEAD ATTACHMENT

The Lead Attachment email is sent to the Affiliate when the Lead is assigned. This email has a subject line of "Affilate Program – Assigned Leads" but the body of the email only includes a notification that a lead has been assigned and is attached to the email. The attachment is an .xls (Microsoft Excel ®) file with each question in a separate column. Only one lead is attached per email.

THE AFFILIATE PORTAL

Affiliates can best view their leads in the Affiliate Portal site. Through the portal site, the Affiliate can then track the disposition of the lead, request a return credit for the lead, or request a promotion fulfillment.

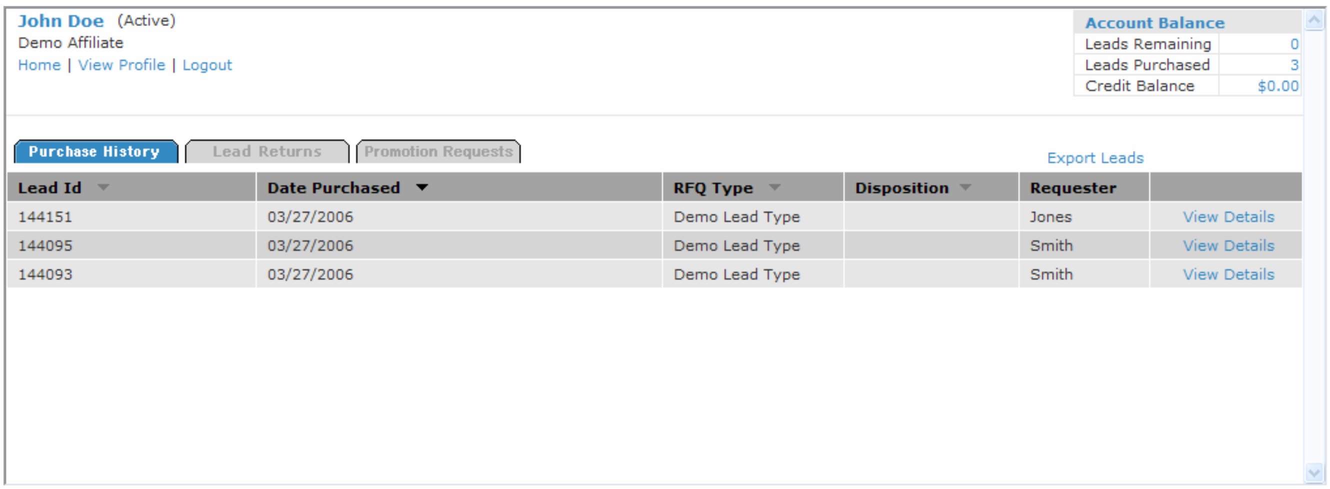


Figure 73 - Affiliate Portal Site

The Home Page of the Affiliate Portal site contains the following information for each Lead:

- Lead ID – the ID for this Lead.
- Date Purchased – the date on which this Lead was assigned to the Affiliate
- RFQ Type – the Lead Type with which this Lead is associated. The Lead Type will determine valid Lead Dispositions, Return Reasons, and Promotions.
- Disposition – the current Lead Disposition, set by the Affiliate.
- Requester – displays the answer to the Survey Question that was mapped to "Primary Requester" on the **Map Questions** page.

Clicking on the View Details link in the Leads table navigates to the **Lead Details** page for the lead in that row. Each Question and Answer for this Lead are displayed.

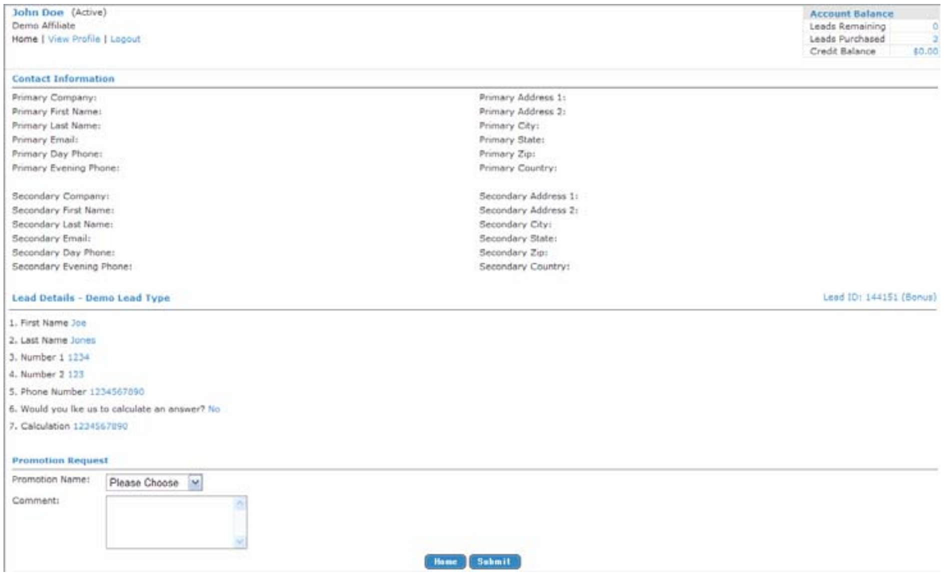


Figure 74 - Lead Details (Affiliate Portal)

At the bottom of the **Lead Details** page, the Affiliate can set a disposition by selecting from the drop-down list box. He can also enter notes to be saved with this Lead.

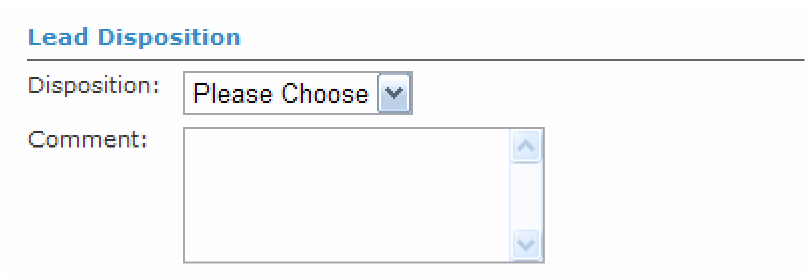


Figure 75 - Lead Dispositions

Once the Affiliate has selected a disposition for the Lead, he must press the **Save** button to save the settings.

Lead Returns

Sometimes an Affiliate will want to return a Lead for credit. Based on the Lead Type, you can control the valid Return reasons that may be selected by the Affiliate.

REQUEST A RETURN CREDIT

To request a return credit for a Lead, the Affiliate must log into the Affiliate Portal site and go to the **Lead Details** page for the Lead they want to return. If there are valid reasons for returning the lead, the Affiliate can select from the drop-down list box of Return Reasons. Some Return Reasons will also require a comment.

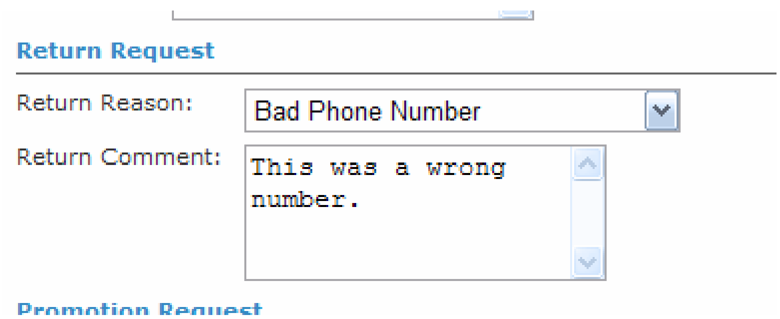
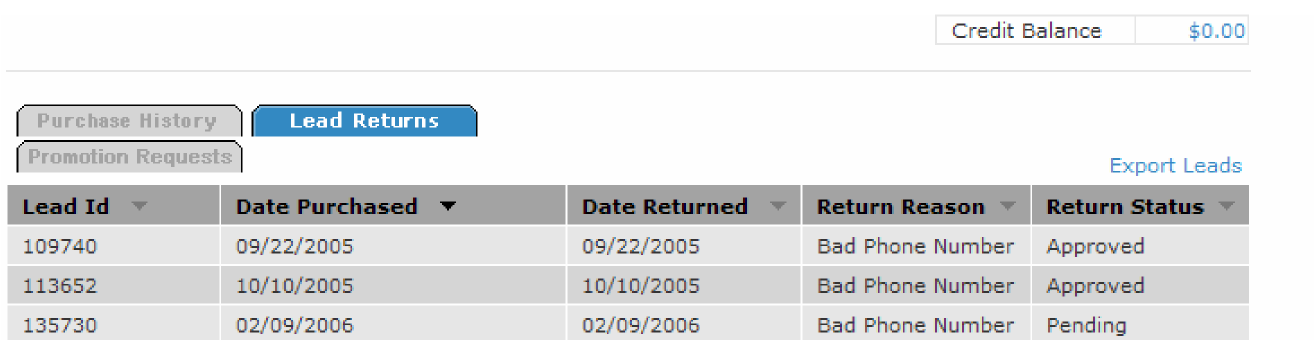


Figure 76 - Requesting a Return

Once the Affiliate has selected a Return Reason for the Lead, he must press the **Save** button to submit the request. The Return Request is then listed on the **Lead Returns** page of the Affiliate Portal site.



Lead Id	Date Purchased	Date Returned	Return Reason	Return Status
109740	09/22/2005	09/22/2005	Bad Phone Number	Approved
113652	10/10/2005	10/10/2005	Bad Phone Number	Approved
135730	02/09/2006	02/09/2006	Bad Phone Number	Pending

Figure 77 - Lead Returns

Requesting a return for a lead sends an email to the administrator of the iLead Machine for your company.

PROCESSING A RETURN REQUEST

You must now review the return request and either approve or decline it. If the request is approved, the lead will be credited back to the Affiliate's allotment. If it is declined, the Lead remains in the Affiliate's Portal site.

The **Manage Returned Leads** page is accessed through the *Leads>Manage Returned Leads menu* from the Navigation Bar.

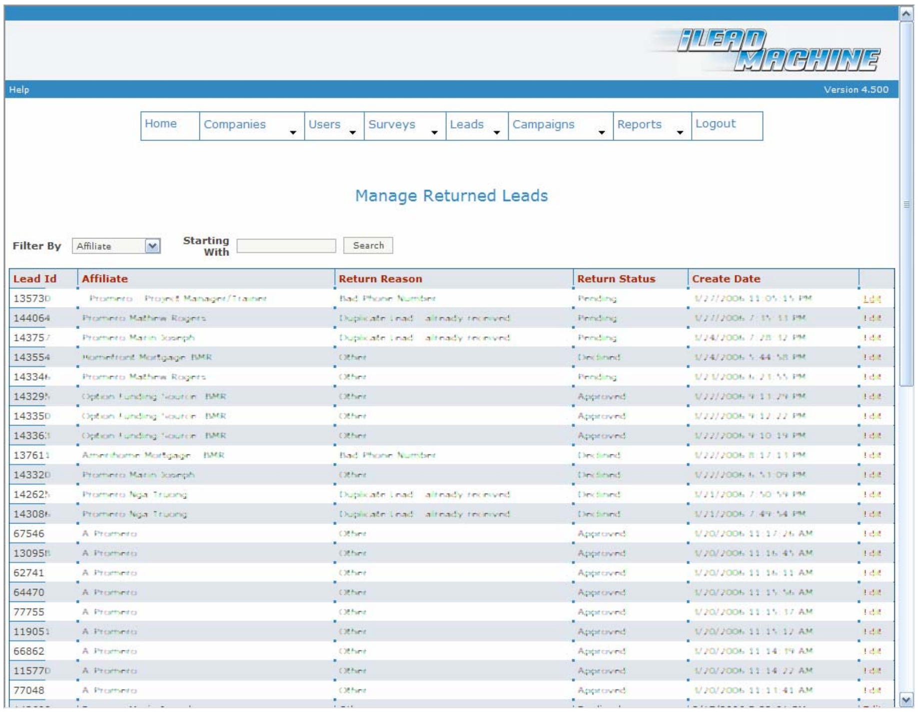


Figure 78 - Manage Returned Leads

Clicking on the Edit link in the Leads table on the **Manage Returned Leads** page navigates to the **Edit Returned Leads** page for the lead in that row.

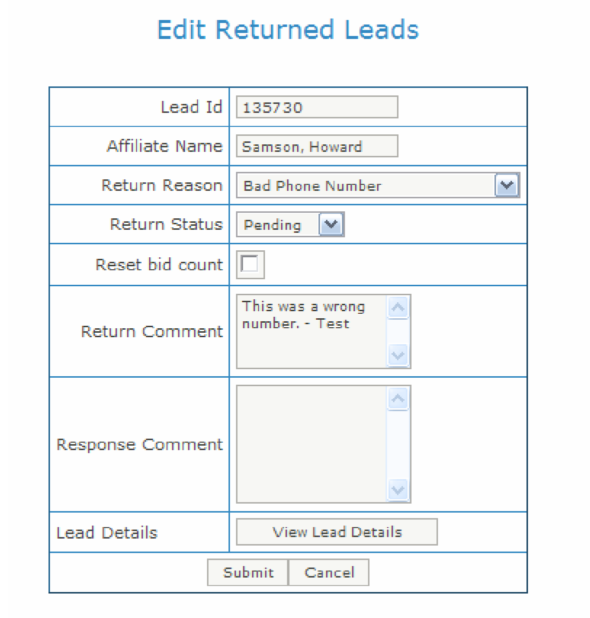


Figure 79 - Edit Returned Leads

The information supplied by the Affiliate in the Return Request is displayed. Pressing the **View Lead Details** button opens a read-only pop-up window displaying the Lead details. You can either approve or decline the Return Request by making the appropriate selection from the **Return Status** drop-down list box.

When you have finished reviewing the lead, press the **Submit** button. The request will be approved or declined and you will be returned to the **Manage Returned Leads** page.

If you press **Cancel** you will be returned to the **Manage Returned Leads** page without the Return Request being processed.

Promotions

You may run special promotions to increase traffic for a lead campaign. In these cases, an Affiliate will need to request a Promotion Fulfillment for a customer.

REQUESTING A PROMOTION FULFILLMENT

To request a Promotion Fulfillment for a Lead, the Affiliate must log into the Affiliate Portal site and go to the **Lead Details** page for the Lead they want to return. If there are valid promotions associated with the lead, the Affiliate can select from the drop-down list box of Promotions.

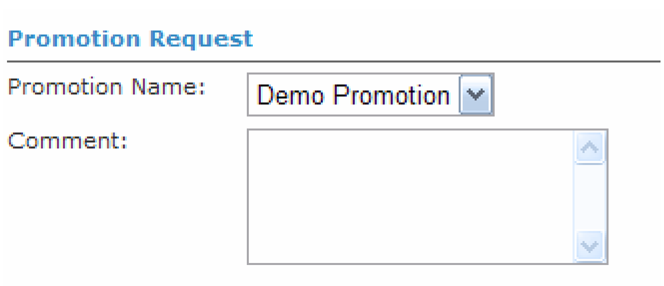


Figure 80 - Requesting a Promotion Fulfillment

Once the Affiliate has selected a Promotion for the Lead, he must press the **Save** button to submit the request. The Promotion request is then listed on the **Promotion Requests** page of the Affiliate Portal site.

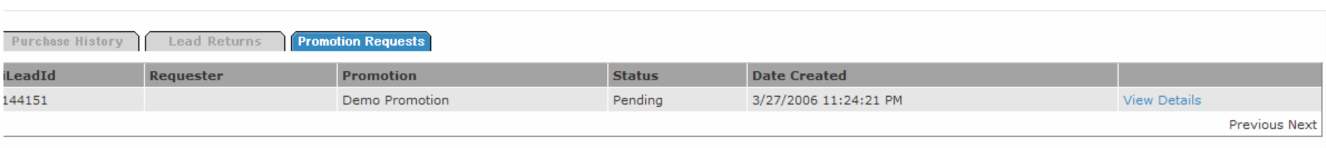


Figure 81 – Promotion Requests

Requesting a Promotion Fulfillment for a lead sends an email to the administrator of the iLead Machine for your company.

FULFILLING A PROMOTION

You must now review the Promotion request and either approve or decline it.

The **Unfulfilled Promotions** page is accessed through the *Leads>Promotions>Unfulfilled Promotions* menu from the Navigation Bar.

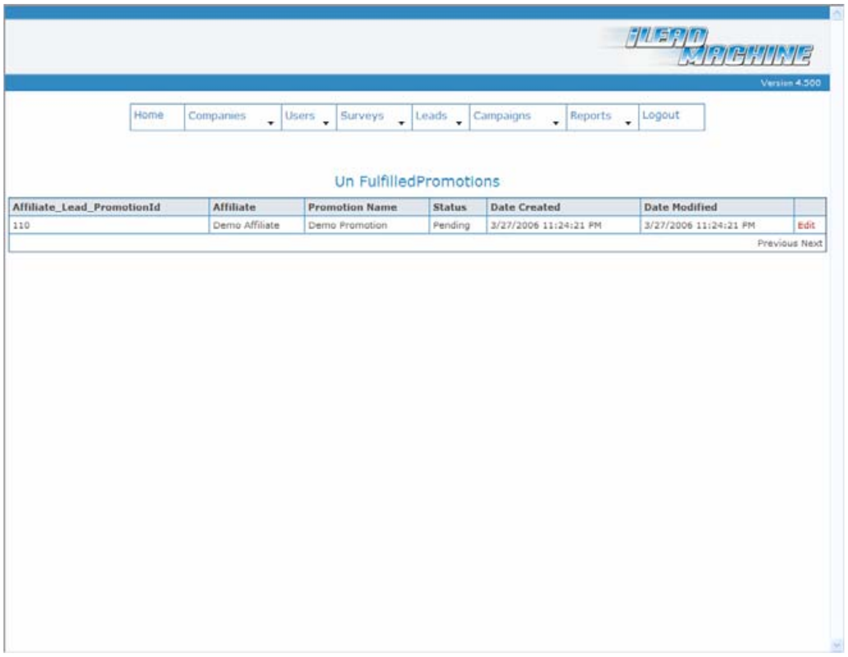


Figure 82 - Unfulfilled Promotions

Clicking on the Edit link in the Leads table on the **Manage Unfulfilled Promotions** page navigates to the **Process Promotions** page for the request in that row.

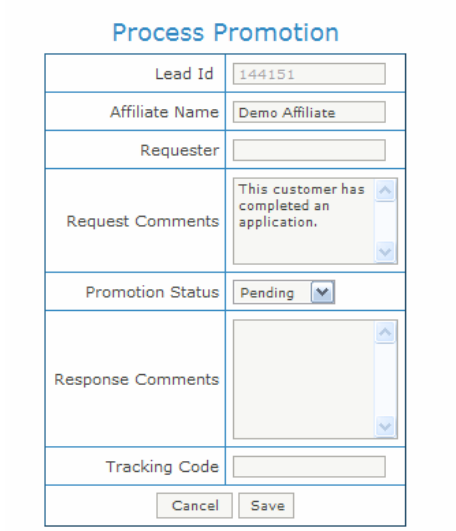


Figure 83 – Process Promotions

The information supplied by the Affiliate in the Promotions Request is displayed. You can either approve or decline the Return Request by making the appropriate selection from the **Promotion Status** drop-down list box.

You can also enter a Tracking Code if the Promotion includes shipping a product to the customer.

When you have finished reviewing the request, press the **Submit** button. The request will be approved or declined and you will be returned to the **Unfulfilled Promotions** page. The Promotion that you just processed will not be displayed here, as it has been processed. It can be found on the **Fulfilled Promotions** page, accessed through the *Leads>Promotions>Fulfilled Promotions* menu from the Navigation Bar.

If you press **Cancel** you will be returned to the **Unfulfilled Promotions** page without the Promotion being processed.

Review and Exercises

Now that you have finished this chapter, you should be able to:

- ✓ Find a lead in the iLead Machine
- ✓ Distinguish between Standard, Exclusive, and Hot Transfer leads
- ✓ View a lead in the Affiliate Portal
- ✓ Complete the Lead Return process
- ✓ Complete the Promotion Fulfillment process

Exercises:

1. Generate a Hot Transfer lead
2. Generate a standard lead
3. Request a return on a lead through the Affiliate Portal site
4. Approve the return request from the exercise above
5. Request a Promotion Fulfillment through the Affiliate Portal site
6. Fulfill the Promotion from the exercise above

Chapter 8: Reports

This chapter covers the Reports available in the iLead Machine Administrative Portal site. Three types of reports will be covered in this section: Affiliate Reports, Publisher Reports, and Lead Reports

Objectives

After completing this chapter you will be able to:

- ✓ Run Affiliate Reports
- ✓ Run Publisher Reports
- ✓ Run Lead Reports

Affiliate Reports

The iLead Machine offers two Affiliate reports. These reports focus on information directly about your Affiliates and their current lead status.

AFFILIATE REPORT

The Affiliate Report contains data on the number of leads selected Affiliates have received. This data can be filtered by Lead Type, Lead Category, and Survey.

The **Affiliate Report** page is accessed through the *Reports>Affiliate Reports>Affiliate Report* menu from the Navigation Bar.

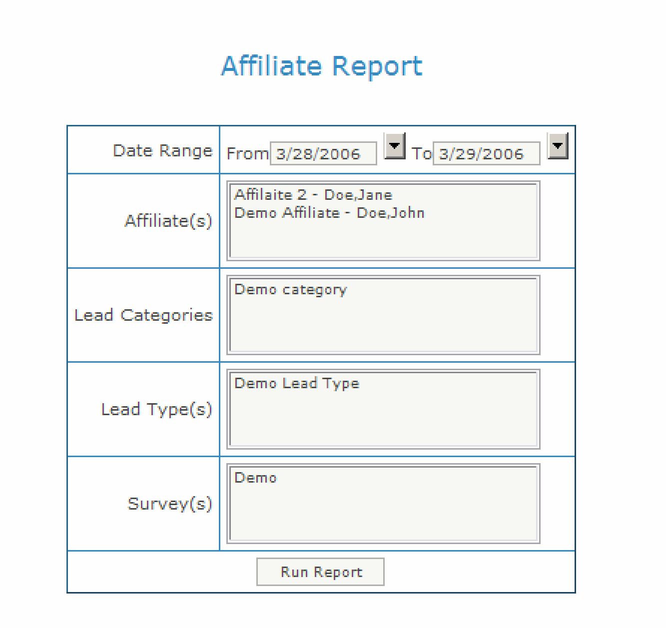


Figure 84 - Affiliate Report Options

The following parameters can be specified for running the Affiliate Report:

- Date Range – the date range during which the number of leads per affiliate should be reported. The default start date is the previous date and the default end date is the current date. You can use the Calendar tool or enter the date manually in the mm/dd/yyyy format.
- Affiliate(s) – use the list order box to select the Affiliate or Affiliates to include in this report.
- Lead Categories – use the list order box to select the Lead Category or Categories to include in this report.
- Lead Type(s) – use the list order box to select the Lead Type or Types to include in this report.
- Survey(s) – use the list order box to select the Survey or Surveys to include in this report.

Once you have selected your criteria, press the **Run Report** button. You will be prompted to open or save the report in Microsoft Excel ® (.xls) format. Each unique set of Affiliate-Lead Category-Lead Type-Survey will display on a separate row.

Affiliate Report
03/01/2006 to 3/29/2006

FirstName	LastName	CompanyName	LeadCategoryName	LeadTypeName	SurveyName	Leads Assigned	Bonus Leads
John	Doe	Demo Affiliate	Demo category	Demo Lead Type	Demo	2	
Jane	Jones	Demo Affiliate	Demo category	Demo Lead Type	Demo	1	

Figure 85 - Affiliate Report (Sample)

AFFILIATE STATEMENT

The Affiliate Statement contains data on each lead assigned to your Affiliates within a selected date range.

The **Affiliate Statement** page is accessed through the *Reports>Affiliate Reports>Affiliate Statement menu* from the Navigation Bar.

Figure 86 - Affiliate Statement Options

The following parameters can be specified for running the Affiliate Statement

- Date Range – the date range during which the number of leads per affiliate should be reported. The default start date is the previous date and the default end date is the current date. You can use the Calendar tool or enter the date manually in the mm/dd/yyyy format.

Once you have selected your criteria, press the **Run Export** button. You will be prompted to open or save the report in Microsoft Excel ® (.xls) format. Each lead assignment will display on a separate row.

Affiliate Statement Report
Date Range: From Date 3/1/2006 To Date 3/29/2006

Lead ID Number	Lead Create Date	Lead Type	Lead Category	Affiliate Type	Company Name	Email	Publisher	Source	Lead 'Sell' Price	Bonus Lead
Lead ID 144093	3/27/2006 20:18	Demo Lead Type	Demo category	Pay Monthly	Demo Affiliate	publisher@publisher.com	Publisher One		50	
Lead ID 144095	3/27/2006 20:23	Demo Lead Type	Demo category	Pay Monthly	Demo Affiliate	publisher@publisher.com	Publisher One		50	
								Total:	100	

Figure 87 - Affiliate Statement (Sample)

Publisher Reports

The iLead Machine offers two Publisher reports. These reports focus on information directly about your Publishers and the leads they have referred. Both reports are accessed through the **Publisher Reports** page. The **Publisher Reports** page is accessed through the *Reports>Publisher Reports>Publisher Reports menu* from the Navigation Bar.

Figure 88 - Publisher Reports Options

Publisher Lead Report

The Publisher Lead Report contains data on each lead referred by your Publishers within a selected date range.

The following parameters can be specified for running the Publisher Lead Report:

- Date Range – the date range during which the number of leads per affiliate should be reported. The default start date is the previous date and the default end date is the current date. You can use the Calendar tool or enter the date manually in the mm/dd/yyyy format.
- Report – to run the Publisher Lead Report, select “Publisher Lead Report” from the drop-down list box.
- Publisher(s) - use the list order box to select the Publisher or Publishers to include in this report.

NOTE: Orphaned Leads are leads that have not been credited to a Publisher (based on the Filters you have set up for your Publishers). “Orphaned” is a selectable option when running Publisher Reports.

Once you have selected your criteria, press the **Run Report** button. You will be prompted to open or save the report in Microsoft Excel ® (.xls) format. The data for each Publisher and Survey on each date in the date range will be displayed on a separate row.

Publisher Lead Report
03/01/2006 to 3/29/2006

Date	Publisher Name	Survey Name	Hit Count	Submit Count	Lead Count	Hit Price	Lead Price	Total Price	Bonus Leads	Assigned Leads	Credited Leads	Unique Assigned Leads	Revenue Generated	Revenue Credited	Total Revenue
3/26/2006 0:00		Demo	1	0	0	0	0	0	0	0	0	0	0	0	0
3/27/2006 0:00		Demo	4	1	1	0	0	0	2	0	0	1	0	0	0
3/27/2006 0:00	Publisher One	Demo	2	2	2	0	0	0	0	2	0	2	100	0	100

Figure 89 - Publisher Lead Report (Sample)

PUBLISHER LEAD SUMMARY REPORT

The Publisher Lead Report contains data on each lead referred by your Publishers within a selected date range. This is identical to the Publisher Lead Report, except that the totals for each Publisher and Survey will be consolidated for the entire date range, rather than a separate row for each date.

The following parameters can be specified for running the Publisher Lead Summary Report

- Date Range – the date range during which the number of leads per affiliate should be reported. The default start date is the previous date and the default end date is the current date. You can use the Calendar tool or enter the date manually in the mm/dd/yyyy format.
- Report – to run the Publisher Lead Summary Report, select "Publisher Lead Summary Report" from the drop-down list box.
- Publisher(s) - use the list order box to select the Publisher or Publishers to include in this report.

NOTE: Orphaned Leads are leads that have not been credited to a Publisher (based on the Filters you have set up for your Publishers). "Orphaned" is a selectable option when running Publisher Reports.

Once you have selected your criteria, press the **Run Report** button. You will be prompted to open or save the report in Microsoft Excel ® (.xls) format. The data for each Publisher and Survey will be displayed on a separate row.

Publisher Lead Summary Report
03/01/2006 to 3/29/2006

Publisher Name	Survey Name	Hit Count	Lead Count	Hit Price	Lead Price	Total Price	Bonus Leads	Assigned Leads	Credited Leads	Unique Assigned Leads	Revenue Generated	Revenue Credited	Total Revenue
	Demo	5	1	0	0	0	2	0	0	1	0	0	0
Publisher One	Demo	2	2	0	0	0	0	2	0	2	100	0	100

Figure 90 - Publisher Lead Summary Report (Sample)

Lead Reports

The iLead Machine offers three Lead reports. These reports focus on specific information about leads in the iLead Machine and lead allocations for your Affiliates.

LEAD REPORT

The Lead Report contains data on each lead submitted into the iLead Machine within a selected date range.

The **Lead Report** page is accessed through the *Reports>Lead Reports>Lead Report* menu from the Navigation Bar.

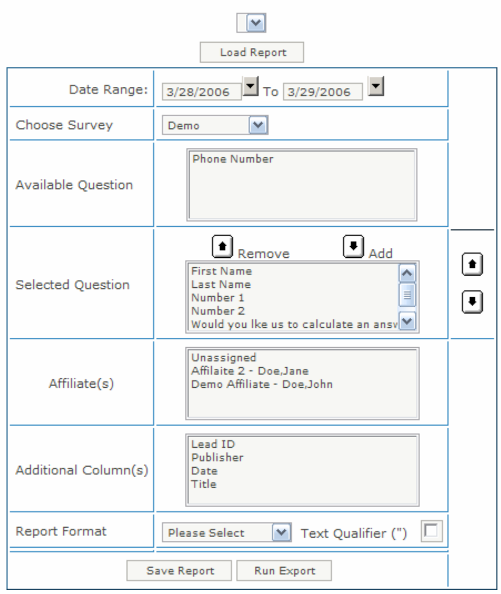


Figure 91 - Lead Report Options

The following parameters can be specified for running the Lead Report:

- Date Range – the date range during which leads should be reported. The default start date is the previous date and the default end date is the current date. You can use the Calendar tool or enter the date manually in the mm/dd/yyyy format.
- Choose Survey – use the drop-down list box to select the Survey for which the Lead Report should be run. Only a single survey may be selected
- Available Question – after selecting a Survey, the questions that appeared on that survey during the selected date range will be listed. Use the list order box to select the Questions you wish to include in the report and press the **Add** button to add them to the **Selected Question** list order box below
- Selected Question – displays the questions you wish to include on the Lead report. The order of the questions (columns) can be changed by selecting a question from the list order box and using the Up and Down arrow buttons to change the ranking.
- Affiliate(s) – use the list order box to select the Affiliate or Affiliates whose leads should

be displayed on the report.

NOTE: Unassigned Leads are leads that have not been assigned to an Affiliate (based on the Filters you have set up for your Affiliates). “Unassigned” is a selectable option when running the Lead Report.

- Additional Columns – use the list order box to select additional columns that should be displayed on the report. Options include:
  - Lead ID – adds the Lead ID in a column for each row on the report
  - Publisher – adds the Publisher (if applicable) in a column for each row on the report
  - Date – adds the Date and Time at which the lead was submitted in a column for each row on the report
  - Title – adds a Title and Date and Time the Report was run to the top of the Report.
- Report Format – use the drop-down list box to select the format you would like the Lead Report to be displayed. Options include:
  - Excel – exports the report in Microsoft Excel ® (.xls) format
  - Delimited Text – displays an additional drop-down list box to identify the delimiting character for the export. Options include:
    - Comma
    - Tab
    - Semicolon
    - Carat
  - Fixed Length Text – this is a future feature of the iLead Machine

NOTE: The “Text Qualifier” checkbox will place quotations around each answer when exporting the report. This is recommended as it will prevent any special characters (such as apostrophes) from causing formatting issues.

Once you have selected your criteria, press the **Run Export** button. You will be prompted to open or save the report in the selected format. Each lead will display on a separate row.

	Lead Report					
	03/01/2006 to 3/29/2006					
First Name	Last Name	Number 1	Number 2	Lead ID	Publisher	Date
Test	Smith	10000	500	144093	Publisher One	3/27/2006 20:18
John	Smith	5000	500	144095	Publisher One	3/27/2006 20:23
Joe	Jones	1234	123	144151		3/27/2006 22:47

Figure 92 - Lead Report (Sample)

NOTE: If you find that you are going to run the same Lead Report many times in your normal business operations, press the **Save Report** button. You will be prompted for a name for this report and the criteria (other than the date range) will be saved. However, only you will be able to access this saved report. Any other Administrator for your company will need to create their own saved versions of the Lead Report.

Lead Distribution Report

The Lead Distribution Report contains data on each assignment made by the iLead Machine to a selected Affiliate during a specified date range.

The **Lead Distribution** page is accessed through the *Reports>Lead Reports>Lead Distribution Report* menu from the Navigation Bar.

Figure 93 - Lead Distribution Report Options

The following parameters can be specified for running the Lead Distribution Report:

- Date Range – the date range during which leads should be reported. The default start date is the previous date and the default end date is the current date. You can use the Calendar tool or enter the date manually in the mm/dd/yyyy format.
- Affiliate – use the drop-down list box to select the Affiliate whose lead assignments should be displayed on the report.

Once you have selected your criteria, press the **Run Export** button. You will be prompted to open or save the report in Microsoft Excel ® (.xls) format.

	Lead Distribution Report			
Affiliate Name			Demo Affiliate	
Affiliate Username			demo@demo.com	
Contact Person			John Doe	
	1234 Main Street Anywhere, FL 33333			
Date	Description	Leads	Disposition	Comment
3/27/2006 19:00	Lead Purchase	50		
3/27/2006 20:18	Assign Lead (Lead 144093)	-1		
3/27/2006 20:23	Assign Lead (Lead 144095)	-1		
3/27/2006 22:49	Assign Bonus Leads (Lead 144151)	0		
	Lead Balance	48		

Figure 94 - Lead Distribution Report (Sample)

LEAD INVENTORY REPORT

The Lead Inventory Report contains data on the current Lead Allocation for all of your Affiliates that are of Affiliate Type "Pay in Advance – Renew Allotment".

The **Lead Inventory** page is accessed through the *Reports>Lead Reports>Lead Inventory Report* menu from the Navigation Bar.

Figure 95 - Lead Inventory Report Options

The following parameters can be specified for running the Lead Inventory Report:

- Date Range – the date range during which leads should be reported. The default start date is the previous date and the default end date is the current date. You can use the Calendar tool or enter the date manually in the mm/dd/yyyy format.
- Affiliate – use the list order box to select the Affiliate or Affiliates whose lead allotment inventory should be displayed on the report.

Once you have selected your criteria, press the **Run Export** button. You will be prompted to open or save the report in Microsoft Excel ® (.xls) format.

Lead Inventory Report
3/29/2006 23:10

Affiliate	Purchase Date	Last Purchase	Leads Debited	Leads Credited	Bonus Leads	Leads Due
Demo Affiliate	3/29/2006 23:06	50	2	0	2	50
Affilaite 2			0	0	0	0

Figure 96 - Lead Inventory Report (Sample)

Supply and Demand Reports

The iLead Machine offers three Supply and Demand reports. These reports focus on the leads already in the system or demand for leads by affiliates based on a specific survey question. These reports are accessed through the **Supply/Demand Reports** page. The **Supply/Demand Reports** page is accessed through the *Reports>Lead Reports>Supply/Demand Reports menu* from the Navigation Bar.

Figure 97 - Supply/Demand Reports Options

MARKET DEMAND REPORT

The Market Demand Report displays the total number of Leads you could distribute to your Affiliates based on the answers to a single Survey Question on a Single Survey. Only questions with selectable answers can be used for this report (e.g. checkbox, radio, select).

Once you have selected your criteria, press the **Run Report** button. You will be prompted to open or save the report in Microsoft Excel ® (.xls) format.

Report Date		Survey	Question	
	3/29/2006	Demo	Would you lke us to calculate an answer?	
Survey Answer		Total	Total Affiliates	
Yes		25		2
No		5		1

Figure 98 - Market Demand Report (Sample)

AFFILIATE DEMAND REPORT

The Affiliate Demand Report displays the number of Leads you could distribute to each Affiliate based on the answers to a single Survey Question on a Single Survey. Also displayed are the time and date of the last assignment to that Affiliate and the valid answers (based on the Affiliate's filter) for leads they will accept.

Once you have selected your criteria, press the **Run Report** button. You will be prompted to open or save the report in Microsoft Excel ® (.xls) format.

Affiliate Demand Report

Report Date	Survey	Question
3/29/2006	Demo	Would you lke us to calculate an answer?

Company Name	Lead Allocation	Last Assign Date	Included Answers	Status	Max Leads	Max Lead Days	Allotment Purchase Date
Demo Affiliate	50	3/29/2006 22:49	No	Active			3/29/2006 21:06
Affiliate 2	20	3/28/2006 21:00	Yes	Active	2	1	3/27/2006 9:06

Figure 99 - Affiliate Demand Report (Sample)

MARKET SUPPLY REPORT

The Market Supply Report displays the number of Available Leads in the iLead Machine based on the answers to a single Survey Question on a Single Survey. This can be used to target new Affiliates with criteria that matches the leads you have been able to generate.

Once you have selected your criteria, press the **Run Report** button. You will be prompted to open or save the report in Microsoft Excel ® (.xls) format.

Market Supply Report

Report Date	Survey	Question
3/29/2006	Demo	Would you lke us to calculate an answer?

SurveyAnswer	
No	1
Yes	2

Figure 100 - Market Supply Report (Sample)

Review and Exercises

Now that you have finished this chapter, you should be able to:

- ✓ Run Affiliate Reports
- ✓ Run Publisher Reports
- ✓ Run Lead Reports

Exercises:

There are no exercises for this section as you will have almost no lead data at this time to display on reports.