Instant Leads Software

SOFTWARE USER GUIDE



Instant Leads Generator version10.1 User Guide

Generate, Distribute and Manage Leads Automatically.

Date: 4th January 2013

Instant Leads Generator Copyright © 2013 Instant Leads Software All Rights Reserved.



The information in this document is subject to change without notice. Companies, names, and data used in examples herein are fictitious unless otherwise noted.

No part of this document may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into a language or computer language, in any form by any means, electronic, mechanical, optical, chemical, manual, or otherwise, for any purpose,

Instant Leads Software

Instant Leads Generator 10.1.1 User Guide of 96

INSTANT LEADS GENERATOR SOFTWARE LICENSE AGREEMENT

IMPORTANT:

PLEASE READ THIS AGREEMENT CAREFULLY BEFORE CONTINUING WITH THE INSTALLATION PROCESS OF THE SOFTWARE ("THE SOFTWARE").

BY INSTALLING THIS SOFTWARE YOU AGREE TO BE BOUND BY THE TERMS OF THIS AGREEMENT. IF YOU DO NOT AGREE TO THE TERMS OF THIS AGREEMENT, THEN DO NOT INSTALL IT!

1. License:

If you have purchased a license to the Software, or have received a trial version Instant Leads Software grants you a non-exclusive right and license to use the Software and the related documentation (the "Documentation") as set forth in this Agreement. You may install the Software on a single server. You may also access the Software using any computer so long as only one copy is used at a time.

You may make a single copy of the Software for backup and archival purposes only provided that any copy must contain all proprietary notices included in the original. You may use the Documentation to assist in your use of the Software. If you download the Software without physical delivery of Documentation, you may review the Documentation online, but you may not make further copies of the Documentation. You own the media on which the Software is installed, but not the Software itself or any copy of it. This license is not a sale of the original or any copy of the Software.

If you have obtained an evaluation copy of the Software, and have not purchased a license to the Software, Instant Leads Software grants you a non-exclusive license to use the Software free of charge for the purpose of evaluating whether you wish to purchase an ongoing license for the Software.

PLEASE NOTE:

Instant Leads Software disclaims all liability and responsibility for any loss of data or other information which may occur as a result of using evaluation or licensed versions of the software.

2. Term of Agreement:

If you have purchased a license to the Software, this Agreement and license are effective from the time you download the Software. You may terminate this Agreement at any time by destroying all copies of the Software. This Agreement will terminate immediately and without further notice if you fail to comply with any provision of this Agreement. All obligations of confidentiality and restrictions on use, and all other provisions that may reasonably be interpreted to survive termination of this Agreement, will survive termination of this Agreement for any reason. Upon termination, you agree to destroy all copies of the Software. If you have obtained an evaluation copy of the Software, and have not purchased a license to the Software, this Agreement and license is also effective from the time you download the Software.

3. License to Use Content:

All graphics, artwork, icons, media and other files contained in the Software, including without limitation Sample Sites, Templates, Sample Content and Extras (collectively, the "Content"), are copyrighted material owned by Instant Leads Software or its licensors.

Instant Leads Generator

Copyright 2013

Page 3 of 96

4. Copying, Transferring or Modifying Software:

The Software contains copyrighted material, trade secrets and other proprietary intellectual property. You may not permit other individuals to install the Software except under the terms listed above. You may not rent, lease, distribute or lend the Software, and you may not sell to others the right to install the Software on any computer. You may not remove any proprietary notices or labels on the Software.

You may not copy, transfer, transmit, sublicense or assign this license or the Software except as expressly permitted in this Agreement. You agree that the terms of this paragraph apply to the Software or any portion thereof, whether owned by Instant Leads Software or Instant Leads Software's licensors.

5. Limited Warranty:

If you have purchased a license to the Software, and if the Software is delivered using a computer storage media such as a CD ROM or diskette, Instant Leads Software warrants that the media on which the Software is furnished will be free from defects in materials and workmanship under normal use for ninety (90) days from the date you received the Software.

This warranty is limited to you and is not transferable. This warranty does not cover damage caused by improper use or neglect. Instant Leads Software's entire liability and your exclusive remedy shall be, at Instant Leads Software' option:

(i) to replace the defective media;

(ii) to advise you how to achieve substantially the same functionality with the Software as described in the Documentation through a procedure different from that set forth in the Documentation; or
 (iii) to refund the license fee you paid for the Software. If you have obtained an evaluation copy of the Software, and have not purchased a license to the Software, Instant Leads Software makes no warranties of any kind with respect to the media (if any) on which the Software is furnished, and such media is provided "as is" and without warranties of any kind.

6. Warranty Disclaimers:

THE SOFTWARE, THE DOCUMENTATION AND (EXCEPT AS PROVIDED IN SECTION 5) THE MEDIA UPON WHICH THE SOFTWARE IS RECORDED (IF ANY) ARE PROVIDED "AS IS" AND WITHOUT WARRANTIES OF ANY KIND, EXPRESS, STATUTORY OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT. THE ENTIRE RISK AS TO THE QUALITY AND PERFORMANCE OF THE SOFTWARE AND THE DOCUMENTATION IS WITH YOU. SHOULD THE SOFTWARE OR THE DOCUMENTATION PROVE DEFECTIVE, YOU (AND NOT INSTANT LEADS SOFTWARE OR ITS DISTRIBUTORS, LICENSORS OR DEALERS) ASSUME THE ENTIRE COST OF ALL NECESSARY SERVICING OR REPAIR.

Instant Leads Software DOES NOT WARRANT THAT THE FUNCTIONS CONTAINED IN THE SOFTWARE WILL MEET YOUR REQUIREMENTS OR OPERATE IN THE COMBINATION THAT YOU MAY SELECT FOR USE, THAT THE OPERATION OF THE SOFTWARE WILL BE UNINTERRUPTED OR ERROR FREE, OR THAT DEFECTS IN THE SOFTWARE WILL BE CORRECTED. NO ORAL OR WRITTEN STATEMENT BY INSTANT LEADS SOFTWARE OR BY A REPRESENTATIVE OF INSTANT LEADS SOFTWARE SHALL CREATE A WARRANTY OR INCREASE THE SCOPE OF THIS WARRANTY.

INSTANT LEADS SOFTWARE DOES NOT WARRANT THE SOFTWARE AGAINST INFRINGEMENT OR THE LIKE WITH RESPECT TO ANY COPYRIGHT, PATENT, TRADE SECRET, TRADEMARK OR OTHER PROPRIETARY RIGHT OF ANY THIRD PARTY AND DOES NOT WARRANT THAT THE SOFTWARE DOES NOT INCLUDE ANY VIRUS, SOFTWARE ROUTINE OR OTHER SOFTWARE DESIGNATED TO PERMIT UNAUTHORIZED ACCESS, TO DISABLE, ERASE OR OTHERWISE HARM SOFTWARE, HARDWARE OR DATA, OR TO PERFORM ANY OTHER SUCH ACTIONS.

Instant Leads Generator 10.1.1 User Guide of 96

Copyright 2013

Page 4

Notwithstanding the above, you may have certain warranty rights which vary from location to location and which cannot be disclaimed by contract. Any warranties that by law survive the foregoing disclaimers shall terminate ninety (90) days from the date you received the Software as shown by your receipt. Some geographic regions do not allow limitations on how long an implied warranty lasts, so the foregoing limitation may not apply to you if prohibited by law.

7. Limitation of Liability:

YOUR SOLE REMEDIES AND INSTANT LEADS SOFTWARE'S ENTIRE LIABILITY ARE SET FORTH ABOVE. IN NO EVENT WILL INSTANT LEADS SOFTWARE OR ITS DISTRIBUTORS OR DEALERS BE LIABLE FOR DIRECT, INDIRECT, INCIDENTAL OR CONSEQUENTIAL DAMAGES RESULTING FROM THE USE OF THE SOFTWARE, THE INABILITY TO USE THE SOFTWARE, OR ANY DEFECT IN THE SOFTWARE, INCLUDING ANY LOST PROFITS, EVEN IF THEY HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGE. IN NO EVENT WILL INSTANT LEADS SOFTWARE'S TOTAL LIABILITY TO YOU FOR ALL DAMAGES, LOSSES, AND CAUSES OF ACTION (WHETHER IN CONTRACT, TORT, INCLUDING NEGLIGENCE, OR OTHERWISE) EXCEED THE AMOUNT YOU PAID FOR THE SOFTWARE. SOME JURISDICTIONS DO NOT ALLOW THE EXCLUSION OR LIMITATION OF RELIEF, INCIDENTAL OR CONSEQUENTIAL DAMAGES, SO THE ABOVE LIMITATION OR EXCLUSION MAY NOT APPLY TO YOU.

You agree that Instant Leads Software and its distributors and dealers will not be liable for defense or indemnity with respect to any claim against you by any third party arising from your possession or use of the Software or the Documentation.

8. High Risk Activities:

The Software is not fault-tolerant and is not designed, manufactured or intended for use or resale as online control equipment in hazardous environments requiring fail-safe performance, such as in the operation of aircraft navigation, air traffic control, nuclear facilities, communication systems, direct life support machines, or weapons systems, in which the failure of the Software could lead directly to death, personal injury, or severe physical or environmental damage. Instant Leads Software and its suppliers specifically disclaim any express or implied warranty of fitness for any high risk uses listed above.

9. Governing Law and Interpretation:

This Agreement shall be interpreted under and governed by the laws of Ireland. If any provision of this Agreement is held illegal or unenforceable by a court or tribunal of competent jurisdiction, the remaining provisions of this Agreement shall remain in effect, and the invalid provision deemed modified to the least degree necessary to remedy such invalidity.

10. Entire Agreement:

This Agreement is the complete agreement between Instant Leads Software and you, and supersedes all prior agreements, oral or written, with respect to the subject matter hereof.

If you have any questions concerning this Agreement, you may write to Instant Leads Software as follows: Instant Leads Software, 44 Northumberland Road, Ballsbridge, Dublin 4, Ireland.

Instant-Leads.com

Table of Contents

1	AB	OUT THIS GUIDE	
2	NA	VIGATION AND THE MENU SYSTEM	
	2.1	Menu System	
	2.2	NAVIGATION METHOD 1	
	2.3	NAVIGATION METHOD 2	
3	тн	EMES & HELP	
e			14
	3.1	THEMES AND LAYOUTS	14
	3.2	SYSTEM-WIDE HELP	14
4	ТН	E ADMIN DASHBOARD	
	4.1	Login as Admin	15
5	SVS	STEM SETTINGS - INITIAL SETUP OF YOUR SYSTEM	16
5	51		
	5.1	SYSTEM SETUP	
	5.2	COMPANY NAME AND SYSTEM EMAIL	
	5.3	ENABLE AUTORESPONSE	
	5.4	ENABLE SELLING TO SAME COMPANY	
	5.5	AUTO APPROVE AFFILIATE CREATED CAMPAIGNS	
	5.6	ALLOW MULTIPLE SELL TIMES	
	5.7	ENABLE AUTO-ASSIGN LEAD CAMPAIGNS TO BUYERS	
	5.8	LEAD DELIVERY METHOD	
	5.9	BLOCK DUPLICATE EMAIL ADDRESSES	
	5.10	REMIND ME OF THE # OF UNSOLD LEADS (EVERY 1-12 HOURS)	
	5.11	CURRENCY	
	5.12	SYSTEM TIME ZONE	
	5.13	BUYER'S DOCUMENT STORAGE LIMIT	
	5.14	ENABLE BUYER REPORTS	
	5.15		
	J.10	SISTEM TEMPLATES	
	J.1/ 5 10	EDIT COUNTRIES	
	J.18	EDIT COMPANIES	
	5 20		
	5.20		

0 0	CAMPAIGNS CONTROL PANEL	
6.1	ADMIN CAMPAIGN	
6.2	AFFILIATE CAMPAIGN	27
6.3	BANNED KEYWORDS	
6.4	CAMPAIGN SETTINGS	
6.5	CATEGORIES	
6.6	Predefined Fields	
6.7	PRICING SCHEDULES	
7 C	CAMPAIGN SETTINGS PAGE	
7.1	Export Leads	
7.2	Predefined Fields	
7.3	SETTINGS	
7.4	DELETE & DELETE LEADS	
7.5	Assign Buyer	
7.6	LOCK / UNLOCK CAMPAIGN	
7.7	IMPORT AS LIVE	
7.8	ASSIGN AFFILIATE	
8 L	LEADS CONTROL PANEL	
8.1	AGED LEADS	
8.1 8.2	Aged Leads	
8.1 8.2 8.3	Aged Leads Live Leads Unsold Leads	
8.18.28.38.4	Aged Leads Live Leads Unsold Leads Pending Refunds	
8.18.28.38.48.5	Aged Leads Live Leads Unsold Leads Pending Refunds Import Leads	
 8.1 8.2 8.3 8.4 8.5 9 U 	Aged Leads Live Leads Unsold Leads Pending Refunds Import Leads	
8.1 8.2 8.3 8.4 8.5 9 U 9.1	Aged Leads Live Leads Unsold Leads Pending Refunds Import Leads JSERS CONTROL PANEL Signup Fields.	
8.1 8.2 8.3 8.4 8.5 9 U 9.1 9.2	AGED LEADS Live Leads Unsold Leads Pending Refunds Import Leads JSERS CONTROL PANEL Signup Fields Buyer Payments	
8.1 8.2 8.3 8.4 8.5 9 U 9.1 9.2 9.3	AGED LEADS LIVE LEADS UNSOLD LEADS PENDING REFUNDS IMPORT LEADS JSERS CONTROL PANEL SIGNUP FIELDS BUYER PAYMENTS BUYER ACCOUNTS	
8.1 8.2 8.3 8.4 8.5 9 U 9.1 9.2 9.3 9.4	AGED LEADS LIVE LEADS UNSOLD LEADS PENDING REFUNDS IMPORT LEADS JSERS CONTROL PANEL SIGNUP FIELDS BUYER PAYMENTS BUYER ACCOUNTS BUYER ACCOUNT BUTTONS	
8.1 8.2 8.3 8.4 8.5 9 U 9.1 9.2 9.3 9.4 10	AGED LEADS LIVE LEADS UNSOLD LEADS PENDING REFUNDS IMPORT LEADS JSERS CONTROL PANEL JSERS CONTROL PANEL BUYER PAYMENTS BUYER PAYMENTS BUYER ACCOUNTS BUYER ACCOUNT BUTTONS BUYER BACK OFFICE	
8.1 8.2 8.3 8.4 8.5 9 U 9.1 9.2 9.3 9.4 10	AGED LEADS LIVE LEADS UNSOLD LEADS PENDING REFUNDS IMPORT LEADS JSERS CONTROL PANEL JSERS CONTROL PANEL BUYER PAYMENTS BUYER PAYMENTS BUYER ACCOUNTS BUYER ACCOUNTS BUYER BACK OFFICE 1 BUYERS DASHBOARD	
8.1 8.2 8.3 8.4 8.5 9 U 9.1 9.2 9.3 9.4 10 10.1 10.2	AGED LEADS LIVE LEADS UNSOLD LEADS PENDING REFUNDS IMPORT LEADS JSERS CONTROL PANEL SIGNUP FIELDS BUYER PAYMENTS BUYER ACCOUNTS BUYER ACCOUNTS BUYER ACCOUNT BUTTONS BUYER BACK OFFICE 1 BUYERS DASHBOARD 2 MY CAMPAIGNS	
8.1 8.2 8.3 8.4 8.5 9 U 9.1 9.2 9.3 9.4 10 10.1 10.2 10.3	Aged Leads Live Leads Unsold Leads Pending Refunds Import Leads JSERS CONTROL PANEL Signup Fields Buyer Payments Buyer Accounts Buyer Account Buttons Buyer Back OFFICE 1 Buyers Dashboard 2 My Campaigns 3 Select Filters Page	37 38 38 39 39 40 41 41 41 41 42 43 43 43 45 45 45 46 47

Instant	Leads Generator 10.1.1 User GuideCopyright 2013	Page 8
15 F	REPORTS CONTROL PANEL	
14.2	SETTING UP PRICING SCHEDULES	
14.1	PRICING SCHEDULES & SEARCHABLE CATEGORIES	
17 (
14 4	HERRY PICKER SYSTEM	76
13.1	CREATING & INTEGRATING A LEAD FORM TO YOUR WEB PAGE	
13 F	UTTING YOUR CAMPAIGN LIVE	
12.15	IF/AND STATEMENTS	
12.14	CREATING ADDITIONAL CUSTOM QUESTIONS	
12.13	TEXT BOX EXACT MATCH	
12.12	Min – Minimum Selection Length	
12.11	MAX – MAXIMUM SELECTION LENGTH	
12.10	Answer Fields	
12.9	QUESTION FIELDS	
12.8	CUSTOM QUESTIONS	
12.7	EXACT MATCH ZIP CODES	
12.6	Predefined Fields	64
12.5	MAXIMUM LEAD COST	
12.5	MINIMUM LEAD COST	
12.2	LEAD PRICE	
12.1	CAMPAION NAME	
10.1	CAMDAICN NAME	67
12 (CAMPAIGN SETUP	
11.3	HOW TO CREATE A CAMPAIGN	61
11.2	MY CAMPAIGNS	
11.1	AFFILIATE DASHBOARD	
11 A	FFILIATE BACK OFFICE	
10.11	EDIT PROFILE	
10.10	My Documents	
10.9	My Reports	
10.8	REVIEW PAYMENTS	
10.7	SEARCH FOR LEADS	
10.6	LEAD DETAILS PAGE	
10.5	MY LEADS	

15.	1 CAMPAIGN REPORTS	
15.2	2 AFFILIATE REPORTS	
15.	3 BUYER REPORTS	
16	EMAIL CONTROL PANEL	
16.	1 TEMPLATES	
16.	2 EMAIL USERS	
1 A	APPENDIX A – INSTALLING THE SOFTWARE	
1.1	Step 1	
1.2	STEP 2	
1.3	STEP 3	
1.4	STEP 4	
1.5	STEP 5	
1.6	STEP 6	
1.7	Step 7	
2 A	APPENDIX B – UPGRADING FROM A PREVIOUS VERSION	
21	STEP 1	87
2.1	STEP 2	
2.3	STEP 3	
2.4	STEP 4	
2.5	STEP 5	
2.6	STEP 6	
2.7	Step 7	
2.8	STEP 8	
2.9	STEP 9	
2.10	0 Step 10	
2.1	1 Step 11	
2.12	2 Step 12	
2.1	3 STEP 13	
2.14	4 Step 14	
2.1	5 STEP 15	
2.1	6 Step 16	
2.1	7 Step 17	
2.1	8 Step 18	
2.1	9 Step 19	

Instant Leads Generator

Copyright 2013

Page 9 of 96

2.2	20 Step 20	
2.2	21 UPGRADE ERROR MESSAGES	
3 A	APPENDIX C – HTTP POSTING LEADS INTO YOU	R SYSTEM95
3.1	UNDERSTANDING FIELD NAMES & CODES	
3.2	2 Unique Campaign Identifier	
3.3	B POSTING EXAMPLE	
3.4	TESTING YOUR POSTING	

1 About This Guide ○ Price ○ Refunds ○ Campaign Name Status Acti 2012-05-28 35.00 33551 Irish Life Assurance - New frank fears odaly@amotts.ie 12:13:04 2012-05-27 33489 Over 50 Life Assurance gerard Griffin geveness@gmail.com 35.00 18:18:00 2012-05-27 35.00 33390 Over 50 Life Assurance kieran sullivan k jdench @live.ie 00:18:04 2012-05-25 15:42:30 33230 Over 50 Life Assurance svekennedy@eircom.net 35.00 sue kennedy -33213 Inight -Lead Ageing Report 111 33198 Ove. 33069 Ove . ew Les 32994 Irish . 32832 Inish \$2962 (right

Congratulations on purchasing Instant Leads Generator! You are now in possession of one of the most advanced lead generation and lead distribution systems available.

Your software is both flexible and highly adaptable for almost every industry and it provides you with everything you need to generate and distribute leads automatically.

It can help small lead companies grow into very large ones, as well as enabling any business with a sales team to grow rapidly.

Note: In this user manual "buyers" and "lead recipients" mean exactly the same thing and are often used interchangeably. Likewise, affiliates and lead vendors also have the same meaning.

Instant Leads Generator

2 Navigation and the Menu System

2.1 Menu System

The menu system in Instant Leads Generator is designed to allow you to quickly move to any area of the software as quickly as possible. It is also set out in a logical manner so that you can easily find what you are looking for. The menu bar is located near at the top of every page in the admin panel as well as in the affiliate and buyer back offices of the system.

There are two methods by which you can quickly navigate to any part of the software.

2.2 Navigation Method 1

To do anything related to users simply click the "Users" icon in the Dashboard and you will enter the Users Control Panel. Here you can click on a number of other icons that will in turn give you access to all your user options.



To go to the Campaigns Control Panel simply click the "Campaigns" icon in the Dashboard. Each of the other icons (Leads, System Settings, Reports and Email System) will likewise bring you to each of the individual control panels and their sub-sections.

Instant Leads Generator 10.1.1 User GuideCopyright 2013Page 12of 96

2.3 Navigation Method 2

The second way of navigating the system is to use the drop downs in the menu bar which look like this:



In the beginning while you are getting familiar with the software it's usually best to use the icons (navigation method 1) to navigate your way around the system.

Then once you have reached a good understanding of the system you may find that the dropdowns (method 2) are the quickest method of navigation.

3 Themes & Help

3.1 Themes and Layouts

On the right hand side of every page you will find a sidebar that can be opened and closed by clicking it's Open Sidebar/Close Sidebar link.

You can use this sidebar to set your preferred system theme and page size. However, you will have more screen space available to you by closing this sidebar when it's not required.



3.2 System-wide Help

Instant Leads Generator provides help and assistance on every page of the software.

If ever you get confused and are not sure what something does, you can find out quickly by clicking it's help icon which looks like this:

Instant Leads	Generator	10.1.1	User	Guide
of 96				

4 The Admin Dashboard

4.1 Login as Admin

Whenever you login as the administrator (admin) you will arrive at the Admin Dashboard which looks like this:

stant Leads Gen	erator					Welcome to your Admin Panel	🖋 Settings 🛛 🧟 Admin Profile 🕑 Log
shboard Users	: 🗸 Campaigns	✓ Leads ✓	System Settings 🗸	Reports	Email System 🗸		
ashboard							
Velcome to Generate & Distril	Instant Lea	ads Gener Autopilot!	rator 10.0				C
Users Campaign Statist	ics	2: 2012-09-26	is System	Settings	Reports	Email System	
Campaign Name	Leads Sold	Refunded 🏠	Refund Rate	Profit	9420	٨	Profit Per Month
Irish Life Assurance	3523	734	21%	35320	6730		Business Insurance - Ireland Income Protection - Feb 2009
Irish Life Assurance - New	1597	407	25%	22945	5384		 Irish Life Assurance Over 50 Life Assurance Irish Life Assurance - New
Over 50 Life Assurance	535	171	32%	10405	4038		
Income Protection - Feb 2009	376	46	12%	2870	2692		
Business Insurance - Ireland	60	0	0%	900	1346		
	es			4 Next Last	0		

The Admin Dashboard can take you to every part of your system instantly. It also displays lots of useful information about your lead campaigns, leads delivered, sales, buyers and affiliates over the past 30 days.

It gives you an illuminating snapshot of your entire business whenever you login to the system.

5 System Settings - Initial Setup of Your System

The first thing that you will need to do on logging into your Admin Dashboard is go to System Setup in the System Settings menu.

5.1 System Setup

System Setup provides you with several options for customising how your instant leads generator system operates.

Campaigns ~ tup or aspects of you Leads Factory info@leadsfac of of of of of of of of of of	Leads ~	Sys Ed Ed Ed Sy Sy Sy Up	tern Settin it Admin Pr it Compani it Countrie stern Setur stern Tern load Files	gs > f rofile es s o olates	Reports	Emai
tup or aspects of yo Leads Factory info@leadsfac of of of of of of of of of of of of of	our softwar / ctory.net	Ed Ed Ed Sy Up	it Admin Pr it Compani it Countrie stem Setuj stem Temj Ioad Files	ofile es s o plates		
tup r aspects of yo Leads Factory info@leadsfac of of of of Bound-Robin	our softwar / ctory.net	e. Sy Up	it Compani it Countrie stem Setuj stem Temj Iload Files	es s o olates		
Leads Factory Info@leadsfac	our softwar / ctory.net	e. Sy Sy Up	it Countrie stem Setuı stem Temı Iload Files	s p plates		
r aspects of yo Leads Factory info@leadsfac	/	e. Sy Sy Up	stem Setuj stem Temj Iload Files	o olates		
Leads Factory info@leadsfac	/ ctory.net	Sy	stem Temj	plates		
info@leadsfac	ctory.net	Up	stem Temp	olates		
 ✓ ✓ ✓ ✓ ✓ Bound-Robin 		Up	load Files			
 ✓ ✓ ✓ Round-Robin 						
 ✓ ✓ Round-Robin 						
Sound-Robin						
Round-Robir						
Round-Robin						
1 counter cobil	n		•			
30			days			
1						
NZD						
Pacific Ocea	an	•	Pacific/Au	ickland	-	
25						
S ROI						
🗹 Lead Agein	ng					
Refunds						
Lead Delive						
	ery					
	25 ROI Lead Ageir Refunds	25 ✓ ROI ✓ Lead Ageing ✓ Refunds	25 ✔ ROI ✔ Lead Ageing	25 V ROI Lead Ageing	25 ▼ ROI ▼ Lead Ageing ▼ a set of the se	25 ▼ ROI ▼ Lead Ageing ▼ Refunds

Instant Leads Generator 10.1.1 User Guide of 96

5.2 Company Name and System Email

You will need to enter your company name into the box provided as well as the e-mail address you wish to use for sending automated messages to your lead buyers and affiliates.

5.3 Enable Autoresponse

You also have the option of enabling or disabling the auto responder. The auto responder system is responsible for automatically e-mailing leads to your lead buyers/sales team whenever a new lead is delivered into their account.

The autoresponder also automatically sends an e-mail to buyers when their funding level is getting low, reminding them to top up their account with funds. The autoresponder also can automatically send an e-mail message from a buyer's e-mail address directly to the lead themselves when the lead submits their details in a lead capture form on a website that is linked to the system.

5.4 Enable Selling to Same Company

When this option is checked, the system will be able to sell the same lead to more than one buyer/recipient in the same company. This option is used in association with the company's list which will be described shortly.

5.5 Auto Approve Affiliate Created Campaigns

When you select this option, whenever an affiliate creates a campaign it is automatically approved and admin does not need to approve it first before offering the campaign to buyers.

Instant Leads Generator

5.6 Allow Multiple Sell Times

This option allows you to sell each lead as many times as you wish. When this option is unselected, each lead will only be sold once, on an exclusive basis. In most cases you will wish to leave this option checked. This is because each affiliate account that has created campaigns can be set by admin to sell its leads anywhere from 1 to multiple times.

5.7 Enable Auto-assign Lead Campaigns to Buyers

When this option is checked, any new campaign that is created will be automatically assigned to every buyer/recipient account. They can then subscribe to those campaigns if they wish to do so.

It is wise to uncheck this option, if you wish only certain types of campaigns to be available to certain types of recipient. For example, you may wish insurance lead recipients to only be able to subscribe to insurance campaigns.

This is particularly the case if you have many types of campaigns, and many types of buyers. With a single instant leads generator system you can generate and distribute as many types of leads as you wish to as many types of buyer as you wish.

For example, you can generate and sell mortgage leads to mortgage lead buyers, insurance leads to insurance lead buyers, home improvement leads to home improvement lead buyers etc.

It looks a lot more professional if each buyer type only sees campaigns that directly relate to their type of business. Therefore, in most cases you will wish to uncheck this option.

5.8 Lead Delivery Method

With Instant Leads Generator there are four main methods by which live leads can be delivered to buyer accounts.

These live lead distribution methods are as follows:

- 1) Round-Robin
- 2) Round-Robin and Ping-Post
- 3) Ping-Post
- 4) Ping-Tree Bidding

When **Round-Robin** is enabled live leads are delivered in an equal round-robin fashion.

When **Round-Robin and Ping-Post** is enabled live leads are normally delivered in an equal round-robin fashion. However, if any lead cannot be delivered to a buyer (due to it not matching any of the filters set by the buyers) partial details of the lead will be pinged out by email to all the buyers subscribed to the campaign. The first buyer to click the "Buy this Lead" link in that email will be the successful purchaser. Any fields that should have their data hidden in the ping-post email (until after purchase) can be entered into the campaign's pricing schedule.

When **Ping-Post** is enabled, each and every live lead that enters the system will be pinged out by email to all the buyers subscribed to the campaign. Again, only partial details of the lead will be visible until after the successful buyer clicks the "Buy this Lead" link in that email. Again, any fields that should have their data hidden in the ping-post email (until after purchase) can be entered into the campaign's pricing schedule.

When the **Ping-Tree Bidding** option is enabled, your system can work as a bidding system where the highest bidder always receives their live leads first until their daily quota is reached or their account runs out of funds.

Your Bid	Position	Top Bid Leads	Actions	11-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1			
EUR55	1	EUR55 10	Unsubscribe	Select Filters	Bid	Export Leads	Delivery Method
EUR61	1	EUR61 1000	Unsubscribe	Select Filters	Bid	Export Leads	Delivery Method

Your buyers can make a bid on their My Campaigns page and see their position in relation to the highest bidder. They then have the option to increase their bid.

5.9 Block Duplicate Email Addresses

To block leads who try to submit their details to the same campaign more than once, you can enter the number of days that you wish to block them for. Then whenever a lead tries to submit their details into the same lead capture form again, their submission will not enter the system and a warning message will be displayed to them.

This can be used to prevent people from "spamming" the system and to ensure that the same lead is never distributed to several buyers without good reason. This feature can be switched off by entering -1 into the "days" box.

5.10 Remind me of the # of unsold leads (Every 1-12 hours)

This sets how often you would like the system to automatically e-mail admin with details of how many leads in the system remain unsold. To use this feature, you will also need to set up a cron job in your hosting control panel.

5.11 Currency

This is where you enter the currency that you wish to set for your entire system. It is important to enter the currency in the international currency format rather than entering a currency symbol. For example, if you wish to set the system to US dollars you would enter it as USD instead of \$. Likewise, if you are selling your leads in Euro you would not enter the symbol € but rather enter it in the international format as EUR.

5.12 System Time Zone

This is where you select the local time zone for your system, so that all parts of the software operate according to that time zone. For example, if you are located in the United States, but you are generating leads in Australia then you will wish to select Sydney (or some other Australian city).

This will enable your lead buyers to see the local time at which each one of their leads was generated, rather than seeing a US time and having to calculate the time difference.

Therefore, you should always set your system time zone according to where most of your lead recipients are geographically located.

5.13 Buyer's Document Storage Limit

Buyers and sales agents can store and attach documents to each of the leads in their account. By entering a value (in MB) in the space provided you can limit the amount of storage space allocated to each of your buyers or sales agents.

5.14 Enable Buyer Reports

You can enable or disable the display of the various reports that your buyers and sales agents have access to. When you disable all of these reports by unchecking them all then the My Reports menu option will disappear from all buyer and sales agent accounts. Once you have completed making the selections on the system setup page, just click "Save Configuration". However, you can return here again whenever you like to change your setup.

Instant Leads Generator

5.15 Footer Text

You can change the text and links that exist at the bottom of every page of the software by editing the footer.php file which is located in the software's main folder.

5.16 System Templates

Instant Leads Generator has a number of templates controlling various areas of the system.

admin.itt

The admin.itt template file controls the menu options in the control panel. You can add or remove links in your admin panel by editing this file.

help.itt

Normally, you will not need to edit this template, as is controls



the various help pop-ups that are available throughout the system whenever you click on one of the blue help buttons (? symbols).

email.itt

This template file controls the text in the autoresponse email messages that the system sends out for you automatically. You will need to change such things as your company name and address and any URLs that you need in those autoresponse messages.

user.itt

This file should not be edited.

terms.itt

This is where you can enter your terms and conditions of business. Whatever you enter in this template will appear on the buyer and affiliate registration forms. These forms can be accessed at the login page before you login to the system, as well as in "Create New Buyer" and "Create New Affiliate" in the admin panel.

default.itt

This file should not be edited.

customer.itt

This template controls the menu options that appear in the buyer accounts.

affiliate.itt

This template controls the menu options that appear in the affiliate accounts.

script.itt

This file should not be edited.

5.17 Edit Countries

<i>c</i> .		ten liet e	
	Jun		The Count
		Search:	
	ID 🔺	Country (Double-click to Edit) 🗘	بريم والعرب والإطلا
	1	Afghanistan	throughou
	2	Albania	
	3	Algeria	
	4	American Samoa	
	5	Andorra	
	8	Angola	However.
	7	Anguila	,
	8	Antarcica	huningga li
	10	Amgus ano Barouda	business i
	11	Arcentina Arcentina	
	12	Amenia	countries i
	13	Aruba	ee antinee i
	14	Ashmore and Cartier Islands	a
	15	Atlantic Ocean	then you c
	16	Australia	,
	17	Austria	odd/romov
	18	Azerbaijan	add/remov
	19	Bahamas	
	20	Bahrain	here so the
Showin		0 of 267 entries First Previous 1 2 3 4 5 Next Last	
Add Cou	intry 📵	elete Country	drondown

The Country file is used throughout the software.

However, if your business limits the countries it deals with then you can add/remove countries here so that the country dropdown box is not

excessively long.

Instant Leads Generator

5.18 Edit Companies

In most cases you will only need one company name in the entire system. <u>This is where you</u> <u>enter your own company name</u>. Then, when buyers sign up for an account they will select your company name by default (on the buyer account signup form).



Please Note:

If you are selling each lead more than one time and to several people in the same company, then you could add their company name on this page.

Then when they are creating a buyer account for themselves, they would select their company name (which would appear in the company drop down on the signup form).

Again, you only need to enter other company names on this page if you are selling each lead <u>more than one time</u> and if you are selling these leads to several people in the same company. It ensures that no two buyers in the same company ever received the same lead.

5.19 Upload Files

Upload File	This is where you can upload your logo to the images folder so that it shows up in the software's header bar.
Upload Files transparent background	For best results your logo should be uploaded as a PNG file with a with maximum dimensions of 184 pixels x 45 pixels.

5.20 Edit Admin Profile

This page is mostly used to change your password and email address. All fields can be edited except your username, which is unchangeable.

6 Campaigns Control Panel

The Campaigns Control Panel is where you have access to every element of your campaigns. You can create and edit campaigns, assign them to buyers, get affiliates and lead vendors to post leads into those campaigns, setup live lead delivery and also the cherry picker system.



6.1 Admin Campaign

If you are generating your own leads then you should create your campaigns in your own affiliate account. This means that you will always need at least one affiliate account for your own inhouse use.

However, if you are going to have several affiliates or lead vendors generating leads for you, then you need to create an "Admin Campaign" here in the Campaigns Control Panel (not in the affiliate account itself).

As admin, you can create Admin Campaigns in the Campaigns Control Panel by clicking the "Admin Campaigns" icon as shown below.

Instant Leads Generator 10.1.1 User Guide of 96



The campaign setup procedure is identical to the method used to create an affiliate campaign which is described in the section Campaign Setup further on in this document.

Once you have created an Admin Campaign <u>you must then assign* it</u> to every affiliate who will be generating leads for the campaign. Each affiliate can then login to their account and "grab" their unique lead capture form code which they can place on their websites.

Note: You can assign an Admin Campaign to multiple affiliates in Campaign Settings in the admin panel by clicking the Admin Campaign's "Assign Affiliate" button.



6.2 Affiliate Campaign

If you are generating your own leads then you should create your campaigns in your own affiliate account. This means that <u>you will always need at least one affiliate account for your own in-house use</u>. You can see all your affiliate accounts by clicking the Affiliate Campaign icon. Here you can login to any affiliate account and create new campaigns.

Affiliate accounts are explained in detail below in the section named Affiliate Back Office.

Instant Leads Generator

6.3 Banned Keywords

The banned keywords filter system allows you to stop leads being sold to your recipients if those leads contain any text that you have entered on the Banned Keywords page.

-			
Ba	anne	ed Keywords 👔	
			Search:
	ID 🔺	Keyword (Double-click to Edit)	≎ Status
	23	αab	Active
	25	shit	Disabled
	28	fuck	Disabled
	31	gmail.com	Active
howin	ng 1 to 4	of 4 entries	First Previous 1 Next L
ld Key	word 0	elete Keyword	

For example it lets you ban swear words and email addresses from certain unwanted domains or from specific IP addresses.

Many people also enter fake phone numbers like 0000000, 1111111, 123-123-1234 and such, so placing these and other obvious fake words and numbers should stop most leads from being automatically delivered to your lead recipients.

6.4 Campaign Settings

The campaign settings page allows you to see every campaign that admin and your affiliates have created. You can choose which predefined fields appear in the buyer's Lead Details page and you can also set a thank you page that appears on form submission.

Each campaign can be assigned a category and a pricing schedule (if you are using the Cherry Picker system). On this page you can also delete campaigns, as well as deleting and exporting leads between selected dates.

Instant Leads Gene	erator			Wel	come to your A	lmin Pane	و هر	Gettings 🖉 A	Admin Profile 🔱 Log
Dashboard Users	 Campaigns - L 	eads 🗸 System S	ettings v Reports	Email System v					lemo
Campaig	gn Settings	2							C
Between DATE1 and DA	ATE2 Date 1:	Date 2:							
] = = = = [
User	Name		Description	Co	ost (EUR) Acti	ve Leads	Buyers	Required da	y Action
admin	ADMIN CAMPAIGN	ITEST	ADMIN CAMPAIGN TE	ST 0.	30 No	0	0	0	Predefined Fields Settings Delete Assign Affiliate
artificialplants	Artificial Plants Irel	land	Artificial Plants Ireland	10	0.00 Yes	1	1	50	

You can also import leads from a csv file and sell them as though they were live or make them available for purchase through the cherry picker system.

You can also assign each campaign to specific buyers and assign admin campaigns to specific affiliates (or lead vendors) who can generate leads for those campaigns. Each of these areas is explained in detail below in the section named Campaign Settings.

6.5 Categories

Categories are used in conjunction with pricing schedules and you only need to setup categories and pricing schedules if you are using the Cherry Picker system (Search for Leads).

You associate a pricing schedule and the searchable category for any campaign in the admin panel, by going to Campaign Settings, and clicking the "Settings" button for the campaign and selecting the pricing schedule and category from the dropdowns.

Your lead buyers can then select a lead category that they wish to search for leads in. Examples of categories would be such verticals as mortgage, insurance, pay-day loans, home repair etc.

Instant Leads Generator

Categories are explained in detail in the section named Cherry Picker System below.

6.6 Predefined Fields

This is where you create predefined fields for your campaigns. You can add, delete and edit your predefined fields on this page. Any of these predefined fields can be used in each of your campaign's lead capture forms.

Pr	edefined Fields 🛛	0
		Search:
-	Name (Double-click to Edit)	Description (Double-click to Edit)
	Age	Age
	Nationality	Nationality
Showin	g 1 to 2 of 2 entries	
Add Field	d Delete Field	

However, you can also create custom questions on any campaign's setup page. As explained later in this document custom questions allow <u>far greater flexibility</u> than predefined fields and can incorporate such things as exact match filter functionality. In most cases it's a lot better to use custom questions instead of predefined fields.

However, predefined fields						
can also have their data						
hidden in the Cherry Picker	٥	Campaign	\$ Email	٢	Address	\$
(search for leads) system		Irish Life Assurance - New	(HIDDEN)		(HIDDEN)	
until after a lead has been		Irish Life Assurance - New	(HIDDEN)		(HIDDEN)	
purchased (see across).		Irish Life Assurance - New	(HIDDEN)		(HIDDEN)	

They can also be hidden in the Ping-Post emails until after a lead has been purchased.

Therefore, it's a good idea to make sure that any field data that should remain hidden in the cherry picker system and ping-post emails (until after a lead is purchased) is created as a predefined field. Then when you create a pricing schedule you can select that it's field data remains hidden until after purchase.

Note: You only need to setup a pricing schedule (and associate that schedule with a campaign on the campaign's "settings" page) if you are selling leads using the cherry picker system and/or selling leads using Ping-Post.

It is not necessary to create a pricing schedule if you are selling leads live to your buyers by the Round-Robin lead distribution method. However, a pricing schedule is required if you wish to sell leads using the Cherry Picker system, or sell leads by Ping-Post (where you wish to hide certain field data until after a lead has been purchased).

In a pricing schedule you can do such things as decreasing the price of each lead as it ages or depending on the number of times it has been sold. Data from certain fields can also be hidden on the results page until a lead is purchased.

rice sci	hedule:	? Se	ell Multiple Times								
		S	ell Multiple Time	:8							
escript	ion	?			4						
fective	:	20	09-11-30								
xpire:		20	20-10-30								
Start Poi	nt:	2 1									
	Field Name 🝸		Description 7	Price/Pct. 7	Calc/Days 🝸	X Sold	7 Pct. 7	Aging	7 Field Cost 7	Hide Result	Active
		🔻	First Time Sold	28.00	0		•	۲	•		٢
	Additional Field	•	2 days old	9.00	2			S			S
3	Additional Field	-	5 days old	14.00	5	•	Ξ	S	Θ	Θ	S
3	Additional Field	-	7 days old	19.00	7	•	Ξ	S	Θ	Θ	S
3	Additional Field	-	8 days old	20.00	8	•	Ξ	S		Θ	۷
3	Additional Field	•	10 days old	23.00	10			۷	Ξ		۷
3	Lead Master - Zip	-		0.00	0	•			•	۷	S
	Lead Master - Email	•		0.00	0					S	≤
						-	0	0	-		

Here is a screenshot of a typical pricing schedule:

Pricing schedules are explained in detail below in the section Cherry Picker System.

Instant Leads Generator

7 Campaign Settings Page

The campaign settings page allows you to see every campaign that admin and your affiliates have created. You can choose which predefined fields appear in the buyer's Lead Details page and you can also set a thank you page that appears on form submission.

Each campaign can be assigned a category and a pricing schedule (if you are using the Cherry Picker system or delivering leads by Ping-Post).

On this page you can also delete campaigns, as well as deleting and exporting leads between selected dates. You can also import leads from a csv file and sell them as though they were live or make them available for purchase through the cherry picker system.

You can also assign each campaign to specific buyers and assign an admin campaign to specific affiliates who can generate leads for that campaign.

Export Leads **Predefined Fields** Settings Delete **Delete Leads** Assign Buyer Unlock Import as Live Export Leads Predefined Fields Settings Live Only Delete **Delete Leads** Assign Buyer Lock Import as Live

Now, let's go though each button one by one:

7.1 Export Leads

When you click this button you can export every lead in the campaign as a csv file. You also export the leads between selected dates using the date pickers at the top of the page.

7.2 Predefined Fields

This button allows you to choose which predefined fields should appear in the buyer's Lead Details page. Even though you select certain predefined fields when you create a new campaign, it is also possible to hide some of these fields from being displayed on the Lead Details page in buyer accounts.

7.3 Settings

The settings button allows you to enter a success/failure page (commonly known as a thank you page) that the lead should be diverted to as soon as they have filled out and submitted the campaign's lead capture form. Please remember to include http:// in the URL of the thank you page.

You can also select a pricing schedule and searchable category that should be associated with the campaign (if you are selling it's leads through the Cherry Picker system (buyer's search for leads facility).

7.4 Delete & Delete Leads

These buttons allow you to delete a campaign or it's leads.

7.5 Assign Buyer

This allows you to assign a campaign to specific buyers who will then be able to see the campaign and subscribe to it on their My Campaigns page.

Instant Leads Generator

They will also be able to setup their filters, delivery schedule and their autoresponse email. Later you can come back here and click the Assign Buyers button again and unselect those buyers from whom you wish to hide the campaign.

shboard	Users 🗸	Campaigns 🗸	Leads v	System Settings 🗸	Reports	Email System	$^{\mathcal{P}}$ live search demo	
Selec	t Buy	/ers wh	o Can	Subscribe	to this	s Camp	aign 🛛	
lser Name		F	ull Name		Loc	k Country	Company	
actionline		N	lark Kenned	ly	9	Ireland	Leads Fact	ory
🎸 ainederha	ederham Aine Derham					Ireland	Leads Fact	огу
aktivcalls		s	Silviu Badelita			Romania	Leads Fact	ory
alannah		A	lannah Petti	igrew	•	Ireland	Leads Fact	ory
anexatele	services	N	Mark Renfroe			Mexico	Leads Fact	ory
🖌 anthonyci	urran	A	Anthony Curran			Ireland	Leads Fact	ory
🎸 anthonyci	urran2	Anthony Curran			2	Ireland	Leads Fact	ory
atentoser	vices	ces Olend King				Nicaragua	Leads Fact	ory
austinbol	ger	A	Austin Bolger			Ireland	Leads Fact	ory
					0			

So long as they remain subscribed to the campaign they will still receive leads according to the settings on their filters page, but they will be unable to see the campaign on their My Filters page until you reassign the campaign to them again.

Finally, when you select the Lock option for a buyer, a blue "Locked" button will appear on their My Campaigns page preventing them from opening or changing their Filters page.

Description	Cost(EUR) Leads	Actions			
Irish Life Assurance	35.00	10	Unsubscribe	Select Filters	Export Leads	Delivery Method
Irish Life Assurance - New Campaign	35.00	1000	Unsubscribe	Locked	Export Leads	Delivery Method
Life Assurance - BetterQuotes.ie	35.00	10	Unsubscribe	Select Filters	Export Leads	Delivery Method
Over 50 Life Assurance	35.00	20	Unsubscribe	Select Filters	Export Leads	Delivery Method
Over 50s Life Cover - BetterQuotes.ie	35.00	10	Unsubscribe	Select Filters	Export Leads	Delivery Method
Instant Leads Generator 10.1.1 Use of 96	er Guide		Соруг	right 2013		Page 34

7.6 Lock / Unlock Campaign

The campaign's Lock/Unlock button (on the Campaign Settings page) allows you to lock or unlock each campaign preventing or allowing it to be edited.

7.7 Import as Live

Impo	rt Leads
Import Type	Search and selling 💌
Enter the order	ir Search and selling SV file will appear here.
Email	Live selling
First Name	2 💌
Last Name	3 💌
Address	4 💌
City	5 💌
Zip	6 💌
State	7 💌
Country	10 💌
Phone	11 💌
Fax	12 💌
County	13 💌
Phone	14 💌
Mobile Phone	15 💌
Age	16 💌
Gender	17 💌
Do You Smoke?	18 💌
Life Assurance Required	19 💌
Serious Illness Cover	20 💌
Terms & Conditions	21 -
CSV File	Choose File No file chosen
Import Leads	

You can use the Import as Live button to import a csv file containing leads and sell them immediately as though they were live, or you can make them available for Cherry Picking on the buyer's search for leads page.

When you select "Live selling" then a box will appear where you can enter the price that you would like to sell the live leads for.

As soon as the leads have been imported they will be delivered instantly into the buyer accounts; according to each buyer's filter settings, their leads per day and their funding levels.

However, if "Search and selling" has been selected, then the leads will immediately enter the cherry picker system instead.

Great care must be taken to correctly map each field in the csv file to its equivalent fieldname on this page. The numbers that you select in the dropdown next to each fieldname should mirror the column number that contains that data in the csv file.

Instant Leads Generator

For example in the screenshot email addresses would need to be in the first column of the csv file, while first names would be in the 2^{nd} column etc.

It's also important not to have any column headers in the csv file, so that the very first record in the file actually contains the first lead itself.

7.8 Assign Affiliate

Whenever you create an Admin Campaign you must then <u>assign</u> that campaign to every affiliate who will be promoting that campaign. Each affiliate can then login to their account and "grab" their unique lead capture form code which they can place on their websites.



Note: You can assign an Admin Campaign to multiple affiliates in Campaign Settings in the admin panel by clicking the Admin Campaign's "Assign Affiliate" button as shown above.
8 Leads Control Panel

There are a number of ways that you can view the leads that each buyer has received. You can see them when you login to any buyer account by going to their My Leads page as well as viewing them on the Buyer Payments page (User Accounts|Buyer Payments).

On the other hand, the Leads Control Panel allows you view every lead in the system as well as deleting them and exporting them (can also be done on the Campaign Settings page).

8.1 Aged Leads

The Aged Leads list displays all the leads from every campaign that have been sold/distributed to buyers through the Cherry Picker system.

Ag	jed Le	ad List 👔									0
ate 1		Date 2:									
	·	buto El									
									Search:		
	Lead ID 💠	Name 🗘	User 🗘	Referer	Campaign 🗘	Email 🗘	Date 👻	Refunded 🗘	Purchased By	Sales 🗘	Times Sold
	A0039556	Bill Gates	irishlifeassurance	Link Open	Irish Life Assurance - New	bill@ms.zz	2012-09-18 19:51:14	Users	Users	0.00	1
	A0038082	Cherine Morrell	bestmortgage	Link Open	Best Mortgage Brokers April2009	cherine.morrell@nielsen.com	2012-06-20 16:15:57		Users	30.00	3
	A0033982	Robert Kee	irishlifeassurance	Link Open	Irish Life Assurance - New	fkeegreenfield@hotmail.com	2012-05-31 11:58:44		Users	35.00	1
	A0032496	Arshad Ali Arshad Ali	irishlifeassurance	Link Open	Irish Life Assurance	info_arshad@yahoo.com	2012-05-12 23:40:41		Users	35.00	1
	A0029354	Bernadette Geraghty	irishlifeassurance	Link Open	Irish Life Assurance	murrayhg@hotmail.com	2012-02-17 19:27:08		Users	35.00	1
	A0027735	Sian Williams	irishlifeassurance	Link Open	Irish Life Assurance	sianshere@gmail.com	2012-01-15 23:05:24		Users	0.00	1
	A0027103	john ellis	irishlifeassurance	Link Open	Irish Life Assurance	johnwhellis@gmail.com	2011-12-16 21:02:55		Users	35.00	1
	A0026618	Karol Skowronski	bestmortgage	Link Open	Best Mortgage Brokers April2009	karol.skowronski@o2.ie	2011-11-26 11:37:50		Users	30.00	1
	A0026234	brian Fennelly	irishlifeassurance	Link Open	Irish Life Assurance	bfennelly78@gmail.com	2011-11-12 15:04:04		Users	35.00	1
	A0025704	Melissa Golden	irishlifeassurance	Link Open	Irish Life Assurance	savoy@falcontravelshop.ie	2011-10-18 13:56:12		Users	30.00	1
	A0025231	malachy gorman	bestmortgage	Link Open	Best Mortgage Brokers April2009	malachygorman@hotmail.com	2011-09-29 16:31:31		Users	30.00	1
	A0024955	Conor Kelly	irishlifeassurance	Link Open	Irish Life Assurance	conor.kelly@stryker.com	2011-09-15 21:49:12		Users	35.00	1
	A0022522	Brian Keegan	irishlifeassurance	Link Open	Irish Life Assurance	brian.keegan@xerox.com	2011-05-30 10:20:01	Users	Users	35.00	1
	A0022335	Alan Jones	irishlifeassurance	Link Open	Irish Life Assurance	alanjones08@eircom.net	2011-05-23 15:58:29		Users	0.00	1
	A0022327	Annette Martin	irishlifeassurance	Link Open	Irish Life Assurance	amartin@muh.ie	2011-05-23 14:29:49		Users	30.00	1
	A0020746	Dermot Smollen	irishlifeassurance	Link Open	Irish Life Assurance	dermotsmollen@hotmail.com	2011-03-29 19:20:35		Users	30.00	1
	A0020588	brian murphy	irishlifeassurance	Link Open	Irish Life Assurance	murphyclann@hotmail.com	2011-03-23 23:13:43		Users	35.00	1
	A0020416	Amanda Comaskey Comaskey	irishlifeassurance	Link Open	Irish Life Assurance	info@pikerslodge.com	2011-03-16 21:12:46		Users	0.00	1
	A0020415	Amanda Comaskey Comaskey	irishlifeassurance	Link Open	Irish Life Assurance	info@pikerslodge.com	2011-03-16 21:12:10		Users	35.00	1
	A0020357	CIARA MCKEEVER	irishlifeassurance	Link Open	Irish Life Assurance	ciaram@cbm.ie	2011-03-15 12:39:42		Users	35.00	1
Showing		29 entries									Next Last
Export L	eads Delet	e Leads									

It also shows the number of times each lead has been sold and at what price. Specific leads can be found using the Search box and the date pickers.

Instant Leads Generator

8.2 Live Leads

The Live Leads list displays all the leads from every campaign that have been sold/distributed to buyers live. It also shows the number of times each lead has been sold and at what price.

	Date 2:									
									Search:	
Lead ID	O Name 🔇	User 🗘	Referer	Campaign 🗘	Email 🗘	Date 💌	Refunded \$	Purchased By	Sales 🗘	Times Sold
A0039574	Luke Pettigrew	irishlifeassurance	Link Open	Irish Life Assurance - New	mikepettigrew@leadsfactory.net	2012-09-21 11:39:37		Users	0.00	1
A0039573	Michael Pettigrew	irishlifeassurance	Link Open	Irish Life Assurance - New	mikepettigrew@leadsfactory.net	2012-09-21 11:30:45		Users	35.00	1
A0039572	JM Vera	irishlifeassurance	Link Open	Irish Life Assurance - New	jmv_922@yahoo.com	2012-09-19 20:48:01		Users	0.00	1
A0039571	JM Vera	irishlifeassurance	Link Open	Irish Life Assurance - New	jmv_922@yahoo.com	2012-09-19 20:29:20		Users	35.00	1
A0039570	Jan Michaels	irishlifeassurance	Link Open	Irish Life Assurance - New	jmv_922@yahoo.com	2012-09-19 16:25:39		Users	35.00	1
A0039569	Jan Michaels	irishlifeassurance	Link Open	Irish Life Assurance - New	jmv_922@yahoo.com	2012-09-19 18:24:40		Users	35.00	1
A0039568	Jan Michaels	irishlifeassurance	Link Open	Irish Life Assurance - New	jmv_922@yahoo.com	2012-09-19 16:23:40		Users	35.00	1
A0039567	Jan Michaels	irishlifeassurance	Link Open	Irish Life Assurance - New	jmv_922@yshco.com	2012-09-19 16:20:49		Users	35.00	1
A0039566	Lorraine Mary	irishlifeassurance	Link Open	Irish Life Assurance - New	info@corporate-plants.com	2012-09-18 23:01:10		Users	35.00	1
A0039565	Lorraine Hogan	irishlifeassurance	Link Open	Irish Life Assurance - New	info@corporate-plants.com	2012-09-18 22:53:33		Users	35.00	1
A0039564	Bill Gates	irishlifeassurance	Link Open	Irish Life Assurance - New	bill@ms.zz	2012-09-18 20:29:44		Users	35.00	1
A0039563	Bill Gates	irishlifeassurance	Link Open	Irish Life Assurance - New	bill@ms.zz	2012-09-18 20:27:53		Users	35.00	1
A0039562	Bill Gates	irishlifeassurance	Link Open	Irish Life Assurance - New	bill@ms.zz	2012-09-18 20:26:37		Users	35.00	1
A0039533	Helen Pettigrew	irishlifeassurance	Link Open	Irish Life Assurance - New	mikepettigrew@leadsfactory.net	2012-09-18 17:58:18		Users	35.00	1
A0039532	Alannah Pettigrew	irishlifeassurance	Link Open	Irish Life Assurance - New	mikepettigrew@leadsfactory.net	2012-09-18 17:45:33		Users	35.00	1
A0039531	Luke Pettigrew	irishlifeassurance	Link Open	Irish Life Assurance - New	mikepettigrew@leadsfactory.net	2012-09-18 17:44:14		Users	35.00	1
A0039530	Pettigrew Michael	irishlifeassurance	Link Open	Irish Life Assurance - New	info@corporate-services-group.net	2012-09-18 17:39:17		Users	35.00	1
A0039529	Kit Vera	irishlifeassurance	Link Open	Irish Life Assurance - New	JM@jm.com	2012-09-13 23:29:30		Users	35.00	1
A0039523	Luke Pettigrew	irishlifeassurance	Link Open	Irish Life Assurance - New	info@corporate-services-group.net	2012-09-13 12:34:28		Users	40.00	1
A0039522	Michael Pettigrew	irishlifeassurance	Link Open	Irish Life Assurance - New	info@corporate-services-group.net	2012-09-13 12:33:02		Users	0.00	1

Export Leads Delete Leads

Specific leads can be found using the Search box and the date pickers.

8.3 Unsold Leads

te 1	:	Date 2:					
						Search:	
1	Lead ID 🗘	Name 🗘	User 🗘	Referer	Campaign 🗘	Email 🗘	Date
1	A0039677	Rupie Pettigrew	irishlifeassurance	Link Open	Irish Life Assurance - New	mikepettigrew@leadsfactory.net	2012-10-03 21:09
1	A0039640	Mark Twain	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:59
1	A0039637	Edz Baselonia	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-28 17:32:
1	A0039636	Cheryl Celo	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:31:
	A0039635	Cheryl Celo	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:27:
]	A0039634	Cheryl Celo	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:24
]	A0039633	Cheryl Celo	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:23
1	A0039632	Armando Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:22
1	A0039631	Armando Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:19
]	A0039630	Mark Depliyan	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:12
1	A0039625	Jestoni Belaragreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-28 18:14
]	A0039624	Jestoni Belaragreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-28 18:03
]	A0039623	Jestoni Belaragreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 16:02
]	A0039622	Jestoni Belaragreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:59
]	A0039621	Jestoni Belaraqreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-28 15:57
]	A0039620	Jestoni Belaragreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:55
	A0039619	Arman Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-28 15:45
	A0039618	Arman Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:29
	A0039617	Arman Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:25
]	A0039616	Arman Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:19

The Unsold Leads list displays leads from every campaign that have not yet been sold and that are available to purchase through the cherry picker system.

Specific leads can be found using the Search box and the date pickers.

Instant Leads Generator 10.1.1 User Guide of 96

8.4 Pending Refunds

On this page you can see all the lead refund requests made by your buyers today or between selected dates and which have not yet been processed by admin.

ate 1: 2012-01-01	Date 2: 2012-10-08	Refund for specific buye	r:
Lead ID	≎ Name	Refunded	▼ Date
L037860	Pascal Curran	Users	2012-06-26 06:30:40
L039435	Pascal Curran	Users	2012-06-26 06:28:57
L021164	Mark Kennedy	Users	2012-09-24 12:12:18
L039116	John Butler	Users	2012-06-25 18:30:40
L039257	John Butler	Users	2012-06-25 18:04:58
L036221	Eamonn Freeman	Users	2012-08-06 12:34:35
L037540	Eamonn Freeman	Users	2012-08-06 14:14:41
L038009	Eamonn Freeman	Users	2012-07-25 12:44:02
L038150	Eamonn Freeman	Users	2012-07-25 12:38:08
L038165	Eamonn Freeman	Users	2012-07-25 12:48:45
L039199	Eamonn Freeman	Users	2012-07-24 22:29:48
L039207	Eamonn Freeman	Users	2012-07-24 18:04:23
L039282	Eamonn Freeman	Users	2012-07-24 18:04:23
L039292	Eamonn Freeman	Users	2012-07-24 22:29:48
L039521	Eamonn Freeman	Users	2012-09-13 11:10:32
L039556	Eamonn Freeman	Users	2012-10-05 18:41:48
L022522	Eamonn Freeman	Users	2012-10-05 11:28:21
L039211	Conor McAleese	Users	2012-08-25 14:11:40
L029096	Anthony Curran	Users	2012-07-25 18:05:45
L036804	Anthony Curran	Users	2012-06-26 07:11:02

By clicking the Users link you can see which buyers have returned the lead and you can then either approve or deny the refund requests. You can also leave a note that the buyer can read.

8.5 Import Leads

You can use the Import as Live button to import a csv file containing leads and sell them immediately as though they were live, or you can make them available for Cherry Picking on the buyer's search for leads page. This is explained in detail in section 7.7 above.

Instant Leads Generator

9 Users Control Panel

There are three types of users: admin, buyers and affiliates.

Buyer accounts (lead recipients) and admin accounts can be created at the login page as well as by selecting "Create New Buyer" or "Create New Affiliate" from the Users dropdown in the admin panel menu.



To access all of your user accounts simply click "Users" in the menu and you will arrive in the Users Control Panel page shown below.

9.1 Signup Fields

By clicking this icon you can add any additional fields you may wish to appear in the buyer and affiliate signup forms such as credit card details etc.

Add Fields to User Registration Form 👔											
		Search:									
 Name (Double-click to Edit) 	Description (Double-click to Edit)	\$ Show									
tests	tests	Yes									
howing 1 to 1 of 1 entries		First Previous 1 Next									

9.2 Buyer Payments

By clicking this button you can see a list of every payment made by each of your buyers as well as the credits admin has applied to their account.

					Search:	
Lead ID 🗘	Lead Name 🗘	Buyer Name 🗘	Campaign 🗘	Date 🔻	Price 🗘	Type 🗘
L039678	Rupie Pettigrew	Eamonn Freeman	Irish Life Assurance - New	2012-10-03 16:33:06	35.00	Lead
L039674	Santa Claus	Eamonn Freeman	Irish Life Assurance - New	2012-10-03 14:30:50	35.00	Lead
L018912	Barry Williamson	Eamonn Freeman	Irish Life Assurance	2012-10-03 14:04:28	35.00	Lead
L019128	brendan love	Eamonn Freeman	Irish Life Assurance	2012-10-03 14:04:28	35.00	Lead
L039673	Luke Pettigrew	Eamonn Freeman	Irish Life Assurance - New	2012-10-03 13:53:04	35.00	Lead
L039672	Michael Pettigrew	Eamonn Freeman	Irish Life Assurance - New	2012-10-03 13:48:50	35.00	Lead
		Eamonn Freeman		2012-10-02 18:18:28	1.00	Paypal Credit
L026618	Karol Skowronski	Eamonn Freeman	Best Mortgage Brokers April2009	2012-10-01 17:08:43	30.00	Lead
L025231	malachy gorman	Eamonn Freeman	Best Mortgage Brokers April2009	2012-10-01 17:08:43	30.00	Lead
L039671	Jason Bourne	Eamonn Freeman	Irish Life Assurance - New	2012-10-01 16:11:08	35.00	Lead
L017917	bridie bishop	Eamonn Freeman	Irish Life Assurance	2012-09-30 15:57:46	35.00	Lead
L026234	brian Fennelly	Eamonn Freeman	Irish Life Assurance	2012-09-30 15:55:10	35.00	Lead
L020588	brian murphy	Eamonn Freeman	Irish Life Assurance	2012-09-30 15:49:47	35.00	Lead
L022522	Brian Keegan	Eamonn Freeman	Irish Life Assurance	2012-09-30 15:48:50	35.00	Lead
L019683	bernadette bustin	Eamonn Freeman	Irish Life Assurance	2012-09-30 14:56:34	0.00	Lead
L039556	Bill Gates	Eamonn Freeman	Irish Life Assurance - New	2012-09-30 14:56:34	0.00	Lead
L020415	Amanda Comaskey Comaskey	Eamonn Freeman	Irish Life Assurance	2012-09-29 11:44:04	35.00	Lead
L032496	Arshad Ali Arshad Ali	Eamonn Freeman	Irish Life Assurance	2012-09-27 14:13:18	35.00	Lead
L039670	Alfie3 Pettigrew	Eamonn Freeman	Irish Life Assurance - New	2012-09-27 13:33:18	35.00	Lead
L039669	Alfie2 Pettigrew	Eamonn Freeman	Irish Life Assurance - New	2012-09-27 13:31:38	53.38	Lead
Showing 1 to 20 of 13,891	entries			First	Previous 1 2 3	4 5 Next Last

You can also see their account balance and every lead they have received as well as which leads have been refund.

Instant Leads Generator

9.3 Buyer Accounts

Buyer Accounts is a complete list of all your buyer accounts and their balances. You can credit buyers, set their ratios, low fund warning flag threshold and login to their account. You can also see the number of leads delivered to each buyer today, the number of refunds and the profit made from each buyer. You can delete, pause and unpause accounts and reset passwords

Buyer	Ac	counts	?									0
										Sea	rch:	
User		Real Name 🗘	Ratio 🗘	Balance 🗘	Delivered 🗘	Refunded 🗘	Profit 🗘	Status 🗘	Settings	Account	Password	Login
actionline	Q	Mark Kennedy	1	352.00	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
adminmandofina	incial	Majella Coady	1	0	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
ainederham	Q	Aine Derham	1	140.00	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
aktivcalls	0	Silviu Badelita	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
alannah	Q	Alannah Pettigrew	1	879.70	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
anexateleservice	s 🔍	Mark Renfroe	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
anthonycurran	0	Anthony Curran	1	560.00	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
anthonycurran2	0	Anthony Curran	1	320.00	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
atentoservices	0	Olend King	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
austinbolger	0	Austin Bolger	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
barrychrome	0	Barry Sheridan	1	10	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
bheffernan	0	Brian Heffernan	1	0	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
billyredmond	0	Billy Redmond	1	960.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
blueocean	0	Janet Hawley	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
brendanallister	0	Brendan Allister	1	0.00			0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
brendankelly	0	Brendan Kelly	1	60.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
callnovo	0	Jadkie Xu	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
CareyCorbett	0	Tommy Corbett	1	0.00			0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
cathairyan	0	Cathal Ryan	0	0	0	0	0.00	Unpause Paused Until 2012-09-30	Credit & Ratio	Delete	ResetPass	AutoLogin
ciaranbrady	0	John Brady Insurances Ltd	1	0.00			0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
showing 1 to 2												Next Last

9.4 Buyer Account Buttons

					Search:	
Profit	\$ Status	٥	Settings	Account	Password	Login
0.00	Account Activ		Credit & Ratio	Delete	ResetPass	AutoLogin
0.00	Account Activ		Credit & Ratio	Delete	ResetPass	AutoLogin
0.00	Unpause Paused Until 2012-10-19		Credit & Ratio	Delete	ResetPass	AutoLogin
0.00	Unpause		Credit & Ratio	Delete	ResetPass	AutoLogin

Account Active/Pause

You can use this button to un-pause any buyer account that is currently paused as well as pausing any account that is currently active.

Credit & Ratio Button

You can use this button to credit a buyer account, set their ratio (explained below) and set a low warning flag that will appear in Buyer Accounts whenever their funding level drops below the threshold you have set here.

By setting each buyer's ratio you can sell the same type of lead at different rates to different buyers. For most buyers you should set their ratio to 1.0 which means that they will pay your full price for any specific lead campaign. However, if you wish to give a buyer a discounted rate so that they only pay 80% of the regular lead price then you would set that buyer's ratio to 0.80

For example:

If you normally sell life insurance leads to buyers at a rate of \$40 and you set most of your buyer's ratios to 1.0 then each of those buyers will pay \$40 for their leads. However, if you have a buyer whose ratio is set to 0.8 then they will get their leads for \$40. X 0.80 = \$32.

Instant Leads Generator

Delete Button

By clicking this button you can delete a buyer account.

ResetPass

This button allows you to reset a buyer's password. A new password will be automatically emailed to the buyer who can then change the password again if they wish to, in their profile.

AutoLogin

You can click this button to login to any buyer account. When you wish to leave the buyer account and go back to the admin panel you can click the logout button in the buyer account.

10 Buyer Back Office

There are three types of users: admin, buyers and affiliates. Buyer accounts (lead recipients) and affiliate accounts can be created at the login page as well as by selecting "Create New Buyer" or "Create New Affiliate" from the Users dropdown in the admin panel menu.

10.1 Buyers Dashboard

		senerato							yar condor
shboar	d M	ly Campaig	jns N	ly Leads	Search for Leads	Review Payments	My Reports	My Documents	Edit P
ate 1:			Dat	e 2:					
		Denerat				Lor	d Delivery		
Lead L	envery	кероп			206	Lea			
Dat		Delivered	Refunded	Refund%	164	British British	efunded		
Mar 2	2011	79	17	22%	123				
Apr 2	011	67	28	42%	02	$- \frown$			
May 2	2011	76	36	47%	02	\sim			
Jun 2	2011	76	28	37%	41	\sim			
Aug 2	2011	91	32	35%	0				
Sep 2	2011	95	31	33%	MA	MJJASO	ONDJF		
Oct 2	011	77	25	32%					
Nov 2	011	103	26	25%					
Dec 2	2011	62	24	39%					
Jan 2	2012	170	60	35%					
Feb 2	012	206	85	41%					
Showing	^{13 te} Firs	t Previous	1 2	3 Next Last					
Showing Accoul Balance: ? Add Account	^{13 te} Firs nt Cont EUR2,06 Funds is active.	t Previous trol 6.00 Rem 2	ind me whe EUR100 se Until:	a Next Last	below: minder		Storage	s Space Used:	
Showing Accoult Balance: Add Account	^{13 to} Firs nt Cont EUR2,06 Funds is active.	trol 6.00 Rem 2 . Paus	ind me whe EUR100 se Until:	Next Lest	below: minder	Dures (fail)	Storage	s Space Used: 3/2	5МВ
Showing Accourt Relance: Add Account Results	13 to Firs nt Cont EUR2,06 Funds is active.	trol 6.00 Rem 2 [. Paus	ind me whe EUR100 se Until:	n my credit is b Save Rer M Septem	below: minder	Pause Until) Cra	storage	s Space Used: 3/2: ments V Orice	5MB
Showing Accoul Balance: 2 Add Account 2 Paus	13 te Firs nt Cont EUR2,06 Funds is active.	trol 6.00 Rem 2 Paus	ind me whee EUR100 se Until:	n my credit is b Save Ren M Septem	below: minder aber • D 26 • (Pause Until Cre Doc	Storage	a Space Used: 3/2 iments V Dele	5MB te Docume
Showing Accoul Balance: Add Account Paus	13 te Firs nt Cont EUR2,06 Funds is active. e Account	t Previous trol 6.00 Rem 2 2	ind me whe EUR100 se Until: r 2012	a Next Last an my credit is b Save Ref M Septem C Lead	below: minder aber • D 26 • (Pause Until Cro Doc	storage sated Before: current Type: Docu	a Space Used: 3/2 ments Dele	5MB te Docume
Showing Accoult Balance: Add Account ? Paus	13 te Firs nt Cont EUR2,06 Funds is active. e Account	t Previous trol 66.00 Rem 27 0 Paus 7 7 0 Date 2012	ind me whe EUR100 se Until: r 2012	a Next Last in my credit is b Cave Ref M Septem C Lead Marga	oblow: minder iber v D 26 v (Name aret Gillick	Pause Until Crr Doc Reminder margaret	sated Before: current Type: Docu	s Space Used: 3/21 ments V Dete Action	5MB te Docume
Showing Accourt Balance: Account Account	13 to First Int Cont EUR2,06 Funds is active. e Account Type S S	t Previous trol 6.00 Rem ?? . Paus . Paus	ind me whe EUR100 se Until: 2012 • 2-09-12 2-09-19	Next Last In my credit is b Save Ref Image: Save Ref M Septem Lead Image: Click t Click t	below: minder ber v D 26 v (Name aret Gillick to edit	Pause Until Cro Doc Reminder margaret Test	storage eated Before: cument Type: Docu Status New 2	2 Space Used: 92 92 92 94 94 95 95 95 95 95 95 95 95 95 95	5MB te Docume
Account Account Account Paus	13 to First Int Cont EUR2,06 Funds is active. a Account Type S S S S	trol 6.00 Rem 72 73 73 74 74 74 74 74 74 74 74 74 74 74 74 74	ind me whee EUR100 ise Until: r 2012 • 2-09-12 2-09-19 2-09-26	A Next Last In my credit is b Sove Real Lead Marga Click t CLAIF	below: minder ber v D 26 v (Name aret Gillok to edit RE HARRINGTON	Pause Until Cre Doc Cre Doc Cre Doc Cre Doc Cre Doc Cre Doc Cre Doc Cre Doc Cre Doc Cre Doc	storage sated Before: uument Type: Docu Status New New of Cold	Space Used: 3/2 ments Cele Action View Let View Let View Let	5MB te Docume Id Id
Showing Account Balance: ? Add Account ? Paus	13 to First Int Cont EUR2,06 Funds is active. e Account Type S S S	t Previous trol 6.00 Rem ?? ? ? ?? ? ? ?? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ?	ind me whee EUR100 se Until: 2012 • 2-09-12 2-09-19 2-09-26 2-09-25	Next Lest Next Lest Seve Rei Seve Rei Marg Click CLAIF Bill G	below: minder ber T D 26 T (Name aret Gillick to edit RE HARRINGTON iates	Pause Until Cro Doc V Reminder mangaret Test Call again to result quote Call Bill Gates	storage sated Before: uument Type: Docu Status New of Cold of Hot	Space Used: 3/2 ments Control	5MB te Documer d d d d d d d d d d d d d d d d d d d
Showing Account ? Add Account Account ? Paus	13 to First Int Confidence of the confidence of	t Previous trol 6.00 Rem 0 0 Rem	ind me whee EUR100 ae Until: / 2012 • 2-09-12 2-09-26 2-09-25 2-09-19	Next Lest Next Lest Next Lest Seve Reg Seve Reg Lead Mage Click CLAF Shill G Adam	below: minder ber T D 26 T (Name aret Gillick RE HARRINGTON iates to edit Re HARRINGTON	Pause Until Cre Doc Doc Doc Doc Doc Doc Doc Doc Doc Doc	storage sated Before: uument Type: Status New of Cold Hot Hot	s Space Used: 3/2 ments Dele C Action View Let View Let View Let View Let View Let View Let View Let View Let View Let	5MB te Document a a a a a a a a a a a a a a a a a a a

When you login to a buyer account you immediately arrive in the Buyer Dashboard.

It displays reports as well as any reminders that the buyer has created.

The buyer can add funds to their account (using their PayPal account or credit card), pause their account, pause it until a certain date and they can also set an automated reminder that will be emailed to them whenever their funding level goes below the threshold that they set.

Instant Leads Generator

Copyright 2013

Page 45 of 96

The buyer can also see the document storage space they have already used and delete old documents, emails and notes to make more storage space available to them.

10.2 My Campaigns

The My Campaigns page is the page where your buyers/sales agents can view the campaigns that have been assigned to them. They can subscribe or unsubscribe to any of the campaigns on this page.

ato 1:								
dive Compaigne	Date 2.							
lser	Name	Description	Cost(EUR)	Leads	s Actions			
ishlifeassurance	Irish Life Assurance	Irish Life Assurance	35.00	10	Unsubscribe	Select Filters	Export Leads	Delivery Methor
ishlifeassurance	Irish Life Assurance - New	Irish Life Assurance - New Campaign	35.00	100	Unsubscribe	Select Filters	Export Leads	Delivery Method
ishlifeassurance	Life Assurance - BetterQuotes.ie	Life Assurance - BetterQuotes.ie	35.00	10	Unsubscribe	Select Filters	Export Leads	Delivery Method
ishlifeassurance	Over 50 Life Assurance	Over 50 Life Assurance	35.00	20	Unsubscribe	Select Filters	Export Leads	Delivery Method
ishlifeassurance	Over 50s Life Cover - BetterQuotes.ie	Over 50s Life Cover - BetterQuotes.ie	35.00	10	Unsubscribe	Select Filters	Export Leads	Delivery Method
vailable Campaigr	15 🕜							
ser	Name	Description			Cos	t (EUR)	Leads	Actions
dundancvinsuran	ce Redundancy Insura	nce 2 Redundancy In:	surance 2				0	Subscribe

By clicking the Select Filters button they can also set the maximum number of leads they would like to receive each day, set their lead filters, their lead delivery schedule and the autoresponse email message that goes out to each lead that is delivered live into their account.

Buyers can also have their leads posted automatically (by http/xml/soap posting) to a third party system (for example an external CRM or lead tracking system).

They can set their posting details by clicking the Delivery Method button. The can also export all their leads, or leads delivered to them between selected dates. These are saved as a csv file when the Export Leads button is clicked.

10.3 Select Filters Page

The filters page allows you to set the filters, delivery schedule, leads per day and autoresponse email message for each buyer.



Once you have set these, it is possible to hide this page entirely so that your buyers cannot see or change their filters page. This is an excellent security measure that ensures that your lead buyers don't change the filter settings you have made for them.

You can hide the Select Filters page from any buyer by going to Campaign Settings in the admin panel and clicking the campaign's Assign Buyer button and selecting Lock for the buyer that you wish to prevent from opening their filters page.

Instant Leads Generator

On the page that opens you can unselect the buyer from whom you wish to hide the campaign and filters page.

Instant Lead	ds Genera	tor			Welcome to	your Adr	nin Panel	🔑 Settings	Admin Profile	ن Log
Dashboard	Users v	Campaigns 🗸	Leads ~	System Settings 🗸	Reports	Emai	il System 🗸	[,] ^Ω live se	arch demo	
Sele	ct Bu	yers wh	o Can	Subscribe	e to th	nis C	ampa	aign	?	0
User Name		F	ull Name			Lock	Country		Company	
actionlin	e	N	lark Kenned	ly		Θ	Ireland		Leads Factory	
🥑 ainederh	nam	ļ	ine Derham	I			Ireland		Leads Factory	
aktivcalls	S	S	Silviu Badelit	а		Θ	Romania		Leads Factory	
😑 alannah		ł	lannah Petti	igrew		Θ	Ireland		Leads Factory	
😑 anexatel	eservices	I	lark Renfroe	•		Ξ	Mexico		Leads Factory	
🥑 anthonyo	curran	Ļ	nthony Curr	an		≤	Ireland		Leads Factory	
🥑 anthonyo	curran2	Ļ	anthony Curr	an		≤	Ireland		Leads Factory	
😑 atentose	ervices	c)lend King			Θ	Nicaragua		Leads Factory	
😑 austinbo	olger	Ļ	ustin Bolge	r		Θ	Ireland		Leads Factory	
e barrychro	ome	E	Barry Sherida	an		Θ	Ireland		Leads Factory	
of bheffern	an	E	Brian Heffern	an		Θ	Ireland		Leads Factory	
						0				

So long as they remain locked they will not be able to open their filters page, until you unlock them again.

Here are a number of campaigns, one of which shows a filters page that has been locked:

Description	Cost(EUR) Leads Actions							
Irish Life Assurance	35.00	10	Unsubscribe	Select Filters	Export Leads	Delivery Method		
Irish Life Assurance - New Campaign	35.00	1000	Unsubscribe	Locked	Export Leads	Delivery Method		
Life Assurance - BetterQuotes.ie	35.00	10	Unsubscribe	Select Filters	Export Leads	Delivery Method		
Over 50 Life Assurance	35.00	20	Unsubscribe	Select Filters	Export Leads	Delivery Method		
Over 50s Life Cover - BetterQuotes.ie	35.00	10	Unsubscribe	Select Filters	Export Leads	Delivery Method		

Instant Leads Generator 10.1.1 User Guide of 96

10.4 HTTP/XML/Soap Posting Leads to External Systems

Lead buyers can quickly and easily setup a posting so that live leads arriving into their account can also be posted on automatically to a third party system (for example a lead tracking or CRM system). Setting up an http post is very easy and is completed as follows:

Instant Lead	ls Generator				Welcome to your B	uyer Control Panel	🖋 My Leads 🛕 My Profile 🔱	Logout
Dashboard	My Campaigns	My Leads	Search for Leads	Review Payments	My Reports	My Documents	Edit Profile	
-							P live search demo	
Setu	n HTTP F	Post					Close Sidebar	
5000	P	?					THEME SWITCHER	0
Delivery Method	: HTTP •	•					Black Rose Theme	
URL (enter url f data post);	or http://stgse	cure.autousa.c	om/ausapo				Apple Dia Theme	
Email:	email						Blueherry Theme	
First Name:	name1							
Last Name:	name2						CHANGE LAYOUT WIDTH	
County	country						What width would you like the page	to
Phone	phone1						have?	
Mobile Phone	phone2						Switch to 100% width	
Age	age						Switch to 90% width	
Gender	gender						Switch to 75% width	
Do You Smoke?	smoker						Switch to 980px width	
Life Assurance Required	life_insura	nce_amt					Switch to 1280px width	
Serious Illness	serious_ill	ness_amt					Switch to 1400px width	
Terms & Conditions	terms						Switch to 1600px width	
Conductor	Vendor	ID=90013						
							Sidebar Functionality:	
Custom HTTP P Fields:	OST						This sidebar is used to switch	
							between the different themes	
					11		which control the look and feel of	of
	I						the system.	
	ľ						You can also change the page	
							width to suit your web browser a	and
							screen resolution.	
							You can open and close the	
							sidebar whenever you need by	
XML Data:							clicking the Open Sidebar/Close	e
							Sidebar icon or button.	
Rem Obser					11			
Save Changes								

In the buyer back office go to My Campaigns, and click the "Delivery Method" button of the campaign for which you wish to setup the posting. On the page that opens (see above) you need to select the Delivery Method from the dropdown and then enter the full URL to which the leads

Instant Leads Generator

should be posted. In each of the fields under the URL box you need to enter the equivalent field name used in the remote system to which you are posting the leads.

If you wish to transfer specific data to the remote system along with every lead (for example your vendor reference number etc) you can do so using the "Custom HTTP Post Fields" box. This is useful if the system that you are posting to needs a unique identifier sent along with every lead.

For example if the remote system uses a field name "Vendor_ID" and if your actual supplier ID is "90013"; then you could enter these values in the "Custom HTTP Post Fields" box. The effect would be that your unique vendor/supplier ID is sent with every lead, so that the remote system knows who sent it. Please examine the above image for clarification. You can add as many of these custom http post fields as you need, each separated by a comma.

Transferring XML Data:

If you need to post xml data to the remote system then you need to use the "XML Data" box at the bottom of the page as well as the campaign's field name boxes at the top of the page.



The following screenshot illustrates the method to be used:

Instant Leads Generator 10.1.1 User Guide of 96

You need to enter into the "XML Data" box the xml field names used by the remote system as well as entering these same field names into the field name boxes at the top of the page.

Here is the format you need to use to input these fieldname values correctly: <field1>value1</field1>

For example: <gender>Male</gender> (Note: this is static data)

Here is the format <u>to include the actual lead data</u> itself: <field_name><==(Your custom field name)==></field_name>

For example: <FN><==FIRST_NAME==></FN>

Setting up an xml posting can appear daunting at first, but its quite straight forwards. The xml posting format will vary from system to system. Therefore, when you are setting up an xml posting to a 3rd party, they must provide you with the exact instructions to post into their system.

Here is a sample xml posting format:

<?xml version="1.0"?> <?ADF version="1.0"?> <adf><prospect> <id sequence="1" source="Provider">800</id> <requestdate>2012-06-06T07:50:53-05:00</requestdate>

<vehicle interest="buy" status="new"> <year>2012</year> <make>MERCEDES-BENZ</make> <model>E-Class</model> <trim>E320 Rwd 4dr Sedan (3.2L 6cyl 5A)</trim> </vehicle>

<customer> <contact> <name part="first">John</name> <name part="last">Doe</name>

Instant Leads Generator

<email>valid@email.com</email>

<phone time="nopreference" type="voice">908-676-2365</phone>
<address><street line="1">7820 Baymeadows Rd. E</street><city>Beverly
Hills</city><regioncode>CA</regioncode><postalcode>90210</postalcode><country>USA</country></address
></contact><timeframe><description>Month</description></timeframe><comments>ADDITIONAL INFO:
Additional comments</comments></customer><vendor><id
source="AutoNation">122044</id><vendorname>DealerDirect</vendorname></vendor><provider><id
source="Program Code">320</id>

10.5 My Leads

The My Leads page allows a buyer to see a complete list of the leads they have received. They can also set the status of each lead to New, Cold, Warm, Hot, or Won.

Instan	t Leads	Generator										Welcome to your	Buyer Control Par
Statistic	<u>s s</u>	elect Campaigns	My Leads	Search for Leads	Review Payments	Edit Profile							
L	eads	s List											
										s	earch Name/Em	ail:	
		Campaign			Name		Email	Date		Price 🗘	Refunds	≎ Status ≎	Action 🗘
	37326	Irish Life Assurance - N	lew		margare	t quirke	quirkyfla@gmail.com	2012-08-18 00:54:27		35.0000		New 💌	View Lead
	37274	Irish Life Assurance - N	lew		brid cool	ke	bridcooke@hotmail.com	2012-06-17 20:38:22		35.0000		New	View Lead
	37246	Irish Life Assurance - N	lew		john coo	ney	jmmcconey@gmail.com	2012-06-17 18:22:33		35.0000		New	View Lead
-	37159	Irish Life Assurance - N	lew		Frank Mu	ullen	Lowryp@eircom.net	2012-08-17 11:23:16		35.0000		New 📼	View Lead
	36956	Irish Life Assurance - N	lew		Ann Wal		eugenewall@gaelic.ie	2012-08-18 15:48:50		35.0000		New 📼	View Lead
	36798	Over 50 Life Assurance	•		kevin co	urtney	ka@courtneyins.ie	2012-06-15 15:37:04		35.0000	Approved		
	36759	Irish Life Assurance - N	lew		Fiacra B	racken	fiacra_bracken@hotmail.com	2012-06-15 10:18:05		35.0000	Approved		
1	36753	Over 50 Life Assurance			Gerald C	Cullen	cullen.gerald0@gmail.com	2012-08-15 09:41:22		35.0000		Warm	View Lead
	30044	Irish Life Assurance - N	lew		Ned Sim	15	ndel1080@gmail.com	2012-06-14 18:47:19		35.0000	Approved		
	36647	Irish Life Assurance - N	lew		George I	McElligott	gmoelligott1@yahoo.co.uk	2012-08-14 18:49:38		35.0000		Cold 💌	View Lead
	36646	Over 50 Life Assurance			WILLIAM	I CONNOLLY	mary@cawleysfurniture.ie	2012-08-14 18:48:24		35.0000		Hot 📼	View Lead
	36642	Irish Life Assurance - N	lew		Andrew 3	Salm	upwood@eircom.net	2012-08-14 18:44:44		35.0000		Won 💌	View Lead
	36569	Over 50 Life Assurance	2		Kay Du F	Plessis	office@lpc.ie	2012-06-14 10:01:59		35.0000	Approved		
	36438	Irish Life Assurance - N	lew		patrick o	ollins	thesteeples51@hotmail.com	2012-06-13 17:39:31		35.0000	Approved		
	36593	Irish Life Assurance - N	lew		Pauline	Forde	fordepauline@gmail.com	2012-08-14 13:48:39		35.0000		Cold 💌	View Lead
	38574	Over 50 Life Assurance			Mary He	aphy	tipwex@eircom.net	2012-08-14 10:38:58		35.0000		Hot 💌	View Lead
	36470	Irish Life Assurance - N	lew		Laura Co	ogha	robcon1234@hotmail.com	2012-06-13 21:05:38		35.0000	Approved		
	36408	Irish Life Assurance - N	lew		Gerard C	Sondon	ger.condon@britvic.com	2012-08-13 14:08:03		35.0000	Approved		
	38513	Irish Life Assurance - N	lew		gemma	o'byme	gemmaob75@hotmail.com	2012-06-14 01:31:28		35.0000		Won 💌	View Lead
8	36465	Over 50 Life Assurance			william t	bambrick	lorrainebambrick@hotmail.com	2012-06-13 20:35:55		35.0000		Won 💌	View Lead
Showi	ng 41 to 6	60 of 1,918 entries							e.	< First <	Previous 1	2 3 4 5 Ne	kt > Last >>

They can also select certain leads, apply for a refund and view the status of their lead refund requests. Buyers can also quickly search for and find any lead in their account and open the Leads Details page of each lead by clicking its View button.

10.6 Lead Details Page

The Lead Details page displays complete details of the lead itself.

Buyers can add their own notes to each lead, as well as creating reminders and attaching documents. They can also use this page to email the lead directly.

9111P	Irish	Life Assurance - New					
nail: ¹ Address: ate/Time: efer ID: ddress:	imu jmv_ 188. 2013 http: 201	jaret Guiick 922@yahoo.com 141.99.20 -06-18 23:04:27 //www.bestinsurancequotes.ie/instant-life-insurance-quote Joea Coult Kevee Backl.imacick.	s2.html?le1&a				
ounty - Limerick	20,1						
- hone - 🚯 061 4	17403						
obile Phone -	087 6789398						
ge - 50-60 years							
ender - Female							
o You Smoke?	- Yes						
fe Assurance I	Required - 50000	D					
erious Illness (Cover-0						
erms & Conditi	ons - I have read	and agree to the Terms & Conditions					
ead Value (if it o	closes): 500	Save Value					
lotes and Em	nails		Attach	n Docum	ients	205	
lotes and En	nails		Attach	n Docum	nents Date	File Size	File Name
lotes and En	Date 2012-09-05	Note/Subject sent follow up email	Attach	Type	Date 2012-08-31 13:30:02	File Size	File Name
lotes and En	Date 2012-09-05 11:44:17 2012-09-05 11:43:43	Note/Subject sent follow up email Quote sent. Waiting to hear back from her	Attach	Type	Date 2012-08-31 13:30:02 2012-08-31 11:44:54	File Size 51KB 2004KB	File Name Iogo.png Design Changes still Pending 26th July 2012.doo
lotes and En	Date 2012-09-05 11:44:17 2012-09-05 11:43:43 2012-09-05 11:43:17	Note/Subject sent follow up email Quote sent. Waiting to hear back from her Insurance Quote	Attach	Type	Date 2012-08-31 13:30:02 2012-08-31 11:44:54 2012-08-31 11:45:22	File Size 51KB 2004KB 29KB	File Name File Name Iogo.png Design Changes still Pending 28th July 2012.doc Proposed New Features for Instant Leads Software - Copy.doc
Type Type Image: Showing 1 to 3	Date 202-09-05 11:42:17 2012-09-05 11:43:43 2012-09-05 11:43:17 of 3 entries	Note/Subject sent follow up email Quote sent. Waiting to hear back from her Insurance Quote	Attach	Type Type Type Type Type Type Type Type	Date 2012-08-31 13:30:02 2012-08-31 11:44:54 2012-08-31 11:45:22 of 3 entries	File Size 51KB 2004KB 29KB	Image: Second system File Name Iogo.png Design Changes still Pending 26th July 2012.doc Proposed New Features for Instant Leads Software - Copy doc
Intersection of the second sec	Date 2012-09-05 11:44:17 2012-09-05 11:43:43 2012-09-05 11:43:47 2012-09-05 11:43:47 of 3 entries	Note/Subject sent follow up email Quote sent. Waiting to hear back from her Insurance Quote	Attach	Type Type Type Type Type Type Type Type	Date 2012-08-31 13:30:02 2012-08-31 11:44:54 2012-08-31 11:45:22 of 3 entries	File Size 51KB 2004KB 29KB	File Name File Name Iogo.png Design Changes still Pending 28th July 2012.doc Propase New Features for Instant Leads Software - Copy doc
lotes and En Type	Date 2012-09-05 11:44:17 2012-09-05 11:43:43 2012-09-05 11:43:17 of 3 entries	Note/Subject sent follow up email Quote sent. Waiting to hear back from her Insurance Quote Send Email Add Note Delete Note/Email	Attach	Type Type Type Type Type Type Type Type	Date 2012-08-31 13:30.02 2012-08-31 11:44:54 2012:08-31 11:45:22 of 3 entries	File Size 51KB 2004KB 29KB	File Name Iogo.png Design Changes still Pending 28th July 2012.doc Proposed New Features for Instant Leads Software - Copy.doc
Iotes and En Type I / / Showing 1 to 3	Date 2012-09-05 11:44:17 2012-09-05 11:43:43 2012-09-05 11:43:43 2012-09-05 11:43:17 of 3 entries Date	Note/Subject sent follow up email Quote sent. Waiting to hear back from her Insurance Quote Send Email Add Note Delete Note/Email	Attach	Type Ty	Date 2012-08-31 13:30:02 2012-08-31 11:44:54 2012-08-31 11:45:22 of 3 entries	File Size 51KB 2004KB 29KB	File Name File Name logo.png Design Changes still Pending 20th July 2012.doc Proposed New Features for Instant Leads Software - Copy.doc

10.7 Search for Leads

Buyers can use the Search for Leads (Cherry Picker) system to find and purchase aged leads that are unsold, or that have not yet been sold the maximum number of times set for that particular lead type. Leads that have just been purchased will immediately appear at the top of the leads list on the My Leads page.

Data from certain fields can be hidden on the results page until a lead is purchased. A full description of how to setup and use the Search for Leads system is given in the Pricing Schedules section of this user manual.

nsura	nce 💌												
											s	earch:	
	First Name 🗘	Last Name 🗘	Campaign 🗘	Email 🗘	Address 🗘	City 🗘	Zip 🗘	State 🗘	Phone 🗘	Price 🗘	Lead Age 🔺	Times Sold 🗘	View Details
	Rupie	Pettigrew	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	1	0	View
	Mary	Gallagher	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	114	0	View
	Robert	Kee	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	126	0	View
	Anne Marie	Devlin	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	126	0	View
			Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	138	0	View
	Claire	Cosgrove	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	140	0	View
	Itzwmuqu	Itzwmuqu	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	150	0	View
	Arun kumar		Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	150	0	View
	Gary	Martin	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	151	0	View
	Ciaran	Beirne	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	152	0	View
	patrick	kearney	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	152	0	View
	peter	ahearn	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	157	0	View
	mjrnbovuuh	mjrnbovuuh	Life Assurance - BetterQuotes.ie	(HIDDEN)	(HIDDEN)					35.00	158	0	View
	iqnInbbvek	iqnInbbvek	Life Assurance - BetterQuotes.ie	(HIDDEN)	(HIDDEN)					35.00	159	0	View
	bpoesedjbq	bpoesedjbq	Life Assurance - BetterQuotes.ie	(HIDDEN)	(HIDDEN)					35.00	161	0	View
	Fergal	Connellan	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	181	0	View
	Lisa	Mc Cabe	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	182	0	View
	afaf	adfa	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	183	0	View
	180	180	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	183	0	View
	qnzsiogmvk	qnzsiogmvk	Life Assurance - BetterQuotes.ie	(HIDDEN)	(HIDDEN)					35.00	193	0	View

Here is a screenshot of the search for leads system page:

Buy Leads

10.8 Review Payments

Buyers can use this page to view all their Credit Card and PayPal payments, as well as any credits that admin has made to their account.

ate 1:	Date 2:		
Date	▼ Amour		Туре
012-10-02 18:18:28	1.00		Paypal Credit
012-09-26 08:35:09	2000.0	1	Admin Credit
012-09-21 06:48:34	1000.0)	Admin Credit
2012-09-21 06:29:15	-145.00		Admin Credit
2012-09-21 06:28:44	75.00		Admin Credit
2012-08-31 12:54:35	1.00		Paypal Credit
2012-06-22 13:44:29	700.00		Admin Credit
2012-06-14 18:44:36	700.00		Admin Credit
2012-06-01 10:28:34	700.00		Admin Credit
2012-05-24 16:16:30	700.00		Admin Credit
2012-05-17 22:59:55	700.00		Admin Credit
2012-05-09 17:20:20	600.00		Admin Credit
2012-05-02 15:23:53	600.00		Admin Credit
2012-04-25 14:23:53	600.00		Admin Credit
2012-04-18 19:29:31	600.00		Admin Credit
2012-04-11 16:20:23	600.00		Admin Credit
2012-04-04 14:35:03	600.00		Admin Credit
2012-03-27 18:21:54	600.00		Admin Credit
2012-03-20 22:14:07	600.00		Admin Credit
2012-03-12 17:47:18	600.00		Admin Credit

Export Leads

10.9 My Reports

Buyers and Sales Agents have access to a variety of useful reports (if admin grants then such permission on the System Setup page in the admin panel).

hin	I color i di color Color di color di c		4.5 1.0 1.0 1.0 1.0 1.0 1.0 1.0 1.0	2005 Indetox Sales In Calegon a likey a Samy + Bad a Nak			
~~~		25 05		a tod ab touthd brites lidde ad			
Delivery	Lead Ageing	Pipeline	ROI	Refunds			
Status	Leads Delivered	Sales Value	Percentage			Sales Pipeline	
Status New	Leads Delivered	Sales Value 49000	Percentage 89%			Sales Pipeline New - 1179 Warm - 116	
Status New Warm Hot	Leads Delivered	Sales Value 49000 8700 24722	Percentage 89% 9% 2%		9% ^{2%}	Sales Pipeline New - 1179 Warm - 116 Hot - 25	
Status New Warm Hot	Leads Delivered 1179 116 25 Total Sales Pipeline:	Sales Value           49000           8700           24722           82422	Percentage 89% 9% 2%		99%2%	Sales Pipeline New - 1179 Warm - 116 Hot - 25	

These reports include a Lead Delivery Report, a Lead Ageing Report, a Sales Pipeline Report, a Return on Investment Report and a Refunds Report.

These reports allow the user to monitor their success, ensure that they don't overlook any important sales opportunities and keep their refund requests to a minimum.

### 10.10 My Documents

Admin only allocates a certain amount of document storage space to each buyer account (set in System Setup). If a buyer were to upload the same documents again and again and attach these to different leads it could be a waste of their document storage space. Therefore, buyers can save storage space by uploading frequently used documents to their My Documents page.

By default, the maximum file size that can be uploaded is 2MB, but this can easily be changed by increasing the value for "upload_max_filesize" in your server's php.ini file.

				Sto	orage Sp	ace Use	d: ] 6	/25ME
Attach	Documer	nts	205	W	X	٦		and the second
	Туре	Date	Fil	e Size		File	Name	
		No Records	No	Records		No F	Records	
Showir	ng 0 to 0 of	0 entries						
		82%						
		0070			Uplo	ad Files	Delete	Files

When attaching a document to a lead or an email, the buyer has the option

of uploading the document from their computer's hard drive or from their My Documents page.

## 10.11 Edit Profile

		?
User Name:		dearnann (Franzisan)
Password (optional):	?	
Re-Enter Password (optional):	?	
Email:	?	mikepettigrew@leadsfactory.net
2nd Email (optional):	?	info@corporate-plants.com
First Name:	?	Eamonn
Last Name:	?	Firelettiati
		Waterford
Address:	7	Waterford
Address: City:	2	Waterford Waterford
Address: City: State/Province:	? ? ?	Waterford Waterford Waterford
Address: City: State/Province: Postal/ZIP Code:	? ? ?	Waterford Waterford Waterford Waterford
Address: City: State/Province: Postal/ZIP Code: Phone:	7 7 7 7	Waterford Waterford Waterford Waterford
Address: City: State/Province: Postal/ZIP Code: Phone: Fax:	2 2 2 2 7	Waterford Waterford Waterford Waterford 66840100
Address: City: State/Province: Postal/ZIP Code: Phone: Fax: Country:	7 7 7 7 7 7	Waterford Waterford Waterford Waterford 05840100 Ireland

This is where each buyer can change their login password and contact details, as well as the email addresses to which lead alert emails should be sent.

Buyers may enter up to two email addresses on this page.

The first email address (which is mandatory) is the one that will used when sending automated emails to the leads that are delivered live into their account.

**Instant Leads Generator** 

Copyright 2013

Page 57 of 96

## 11 Affiliate Back Office

Admin can view all the affiliate accounts by clicking the "Affiliate Accounts" icon in the Users Control panel.



Here you can see a complete list of all your affiliate accounts.

Affilia	te	Accounts	?							C
									Search:	
User	•	Real Name	🗘 Ratio	Salance	\$ Sell Times	\$	Action	Action	Action	Action
alannahbuyer	0	Alannah Pettigrew	1	0.00	7		Invoice	Delete	ResetPass	AutoLogin
artificialplants	0	Tony Mulville	1	0.00	1		Invoice	Delete	ResetPass	AutoLogin
australian	0	Mike Pettigrew	1	0.00	1		Invoice	Delete	ResetPass	AutoLogin
bestmortgage	0	Mike Pettigrew	1	8630.00	3		Invoice	Delete	ResetPass	AutoLogin
bestmortgagebro	kers2	Mike Pettigrew	1	0.00	1		Invoice	Delete	ResetPass	AutoLogin
business	0	Mike Pettigrew	1	6115.00	1		Invoice	Delete	ResetPass	AutoLogin
china	0	Mike Pettigrew	1	0.60	1		Invoice	Delete	ResetPass	AutoLogin
debt	0	Mike Pettigrew	1	39805.00	1		Invoice	Delete	ResetPass	AutoLogin
debttest	0	Mike Pettigrew	1	12015.90	1		Invoice	Delete	ResetPass	AutoLogin
freecalloenter	0	Mike Pettigrew	1	34.00	1		Invoice	Delete	ResetPass	AutoLogin
home	Q	Mike Pettigrew	1	1420.00	1		Invoice	Delete	ResetPass	AutoLogin
income	Q	Mike Pettigrew	1	840.00	1		Invoice	Delete	ResetPass	AutoLogin
incomeprotectfel	b 🔾	Mike Pettigrew	1	18915.00	1		Invoice	Delete	ResetPass	AutoLogin
instantleads	Q	Mike Pettigrew	1	9.00	1		Invoice	Delete	ResetPass	AutoLogin
insurance	0	Insurance Leads	1	3555.61	1		Invoice	Delete	ResetPass	AutoLogin
invoicediscounti	ng Q	Mike Pettigrew	1	0.00	1		Invoice	Delete	ResetPass	AutoLogin
irish	0	Mike Pettigrew	1	7562.00	1		Invoice	Delete	ResetPass	AutoLogin
irishlifeassurance	0	Mike Pettigrew	1	1505.00	1		Invoice	Delete	ResetPass	AutoLogin
irishlifeinsurance	20	Mike Pettigrew	1	2460.00	1		Invoice	Delete	ResetPass	AutoLogin
irishmortgage	Q	IrishMortgage Mortgage	1	24560.00	1		Invoice	Delete	ResetPass	AutoLogin
howing 1 to 2	0 of 3	3 entries	·			_			First Previous	2 Next Las

Instant Leads Generator 10.1.1 User Guide of 96

You can set the ratio (what percentage of a lead's selling price that they should be paid) for each affiliate, credit their account (whenever you pay them), delete accounts, reset passwords and login to any affiliate account.

You can also set the maximum number of times that each lead generated by them should be sold. You can do this by clicking the affiliate's "Invoice" button and entering the sell times

For example:

If you set the sell times to 3 then every lead generated by that affiliate will be sold a maximum of 3 times. To sell an affiliate's leads on an exclusive basis you would set their sell times to 1.

### 11.1 Affiliate Dashboard

When you login to an affiliate campaign you will arrive in the Affiliate Dashboard.

The table shows a complete list of every lead that the affiliate has generated. It also displays a record of which leads have been returned by buyers for refund and that have been approved by admin. Those leads that admin has approved for refund show a commission earned of "zero".

						Se	earch:
Lead ID 🗘	Referer ID 🗘	Generated 💌	Category 🗘	Lead Sales 🗘	Sell Times 🗘	Refund Times 🗘	Commision Earned
L039629	Link Open	2012-09-26 17:01:44	Insurance	35.00	1	0	35.00
L039628	Link Open	2012-09-26 16:43:29	Insurance	35.00	1	0	35.00
L039627	Link Open	2012-09-26 16:27:35	Insurance	35.00	1	0	35.00
L039626	Link Open	2012-09-26 16:18:23	Insurance	35.00	1	0	35.00
L039625	Link Open	2012-09-26 16:14:32	Insurance	0.00	0	0	0.00
L039624	Link Open	2012-09-26 16:03:59	Insurance	0.00	0	0	0.00
L039623	Link Open	2012-09-26 16:02:25	Insurance	0.00	0	0	0.00
L039622	Link Open	2012-09-26 15:59:45	Insurance	0.00	0	0	0.00
L039621	Link Open	2012-09-26 15:57:35	Insurance	0.00	0	0	0.00
L039620	Link Open	2012-09-26 15:55:04	Insurance	0.00	0	0	0.00
L039619	Link Open	2012-09-26 15:45:07	Insurance	0.00	0	0	0.00
L039618	Link Open	2012-09-26 15:29:18	Insurance	0.00	0	0	0.00
L039617	Link Open	2012-09-26 15:25:36	Insurance	0.00	0	0	0.00
L039616	Link Open	2012-09-26 15:19:12	Insurance	0.00	0	0	0.00
L039615	Link Open	2012-09-26 15:13:17	Insurance	0.00	0	0	0.00
L039614	Link Open	2012-09-26 15:07:18	Insurance	0.00	0	0	0.00
L039613	Link Open	2012-09-26 15:05:16	Insurance	0.00	0	0	0.00
L039612	Link Open	2012-09-26 14:46:59	Insurance	35.00	1	0	35.00
L039611	Link Open	2012-09-26 14:41:03	Insurance	35.00	1	0	35.00
L039610	Link Open	2012-09-26 13:18:01	Insurance	35.00	1	0	35.00
Showing 1 to 20	of 10,432 entries						1 2 3 4 5 Next Last

**Instant Leads Generator** 

Likewise each lead that the affiliate has generated and that has been sold (and not refunded) shows the commission owed to the affiliate for that lead sale.

Affiliates can also see the total amount of commission earned by them and that is payable to them. This figure can be reset by admin every time admin makes a payment to the affiliate. Admin can do this by going to "Affiliate Accounts" in the Users Control panel and clicking the affiliate's "Invoice" button and entering a figure in the "Amount" box.

### 11.2 My Campaigns

The affiliate's My Campaigns page displays a list of every campaign created by the affiliate. This page is also used to create new campaigns, edit existing ones, create complex pricing models and automatically generate lead capture forms.

Statistics	My Campaigns	Edit Profile								
Can	npaign Set	ttings								¢
Active Camp	aigns 🔽									
Active Camp Name	aigns ?		Description	Active	Total Leads Generated	Total Profit	Actions			
Active Camp Name Irish Life As	oaigns 7 surance		Description Irish Life Assurance	Active Active	Total Leads Generated 13047	Total Profit 521880	Actions	Edit) (	IF/AND statements	Show
Active Camp Name Irish Life As Irish Life As	oaigns 7 surance surance - New		Description Irish Life Assurance Irish Life Assurance - New Campaign	Active Active Active	Total Leads Generated 13047 1712	Total Profit 521880 68480	Actions Delete Delete	Edit (	IF/AND statements	Show Show
Active Camp Name Irish Life As Irish Life As Life Assura	surance surance - New nce - BetterQuotes.ie		Description Irish Life Assurance Irish Life Assurance - New Campaign Life Assurance - BetterQuotes ie	Active Active Active Active	Total Leads Generated           13047           1712           283	Total Profit           521880           68480           11320	Actions Delete Delete Delete	Edit Edit Edit	IF/AND statements IF/AND statements IF/AND statements	Show Show Show
Active Camp Name Irish Life As Irish Life As Life Assura Over 50 Life	surance surance - New nce - BetterQuotes.ie Assurance		Description Irish Life Assurance Irish Life Assurance - New Campaign Life Assurance - BetterQuotes ie Over 50 Life Assurance	Active Active Active Active Active	Total Leads Generated           13047           1712           283           1705	Total Profit           521880           68480           11320           68200	Actions Delete Delete Delete	Edit Edit Edit	F/AND statements F/AND statements IF/AND statements IF/AND statements	Show Show Show Show

### 11.3 How to Create a Campaign

There are two methods which you can use to create a campaign.

**Affiliate Campaigns:** If you are generating your own leads then you would create your campaigns here in your own affiliate account. This means that <u>you will always need at least one affiliate account for your own in-house use</u>. You can create a new campaign by clicking the "Create New Campaign" button.

Admin Campaigns: If you are going to have several affiliates or lead vendors generating leads for you, then you need to create an "Admin Campaign" in the Campaigns Control Panel (not in the affiliate account itself). As admin, you can create Admin Campaigns in the Campaigns Control Panel by clicking the "Admin Campaigns" icon.



The campaign setup procedure is identical to the method used to create an affiliate campaign which is described in detail below in the section Campaign Setup.

Once you have created an Admin Campaign <u>you must then assign* it</u> to every affiliate who will be generating leads for the campaign. Each affiliate can then login to their account and "grab" their unique lead capture form code which they can place on their websites.

**Note:** You can assign an Admin Campaign to multiple affiliates in Campaign Settings in the admin panel by clicking the Admin Campaign's "Assign Affiliate" button as shown here.



**Instant Leads Generator** 

## 12 Campaign Setup

Setting up a new campaign is very straight forwards and once you are familiar with the process it is possible to setup new campaigns and put them live in only a few minutes. When you click the Create New Campaign the Campaign Setup page will open. This is shown below:

Instant Lea	ads Ger	nerato	or	Welcome to your Affiliate Control Panel	🔑 Settings	🙎 My account	😃 Logout
Statistics	My Ca	mpaig	ns Edit Profile		[₽] live sea	rch demo	
Can	npai	gn	Setup	AMPAIGN 7			0
Campaign Nar Campaign Des	me scription	?	Irish Life Assurance - N Irish Life Assurance - N	lew New Campaign			
Activate Cam Lead Price	paign	?	<b>⋖</b> 40.00				
Minimum Leac Maximum Lea	d Cost Id Cost	?	30.00 50.00				

### 12.1 Campaign Name

The Campaign Name is not just for you to remember what the campaign is about, but also for your affiliates, buyers and sales agents. Therefore, when selecting a name it would be best to use a name that accurately describes the nature of the campaign.

Here is an example of a well chosen campaign name: Mortgage Quote 1 - Live Leads

### 12.2 Activate Campaign

The Activate campaign setting is used to let the system know when you are finished creating the campaigns and you are ready to send the campaign to the admin for review/approval.

Activate Campaign

 $\checkmark$ 

?

### 12.3 Lead Price

The Lead Price allows you to set the basic starting price a lead should cost. This is not necessarily the price you lead will sell for as there are many other factors that can change this price, some set on this page and some set in other areas of the system.

Lead Price	?	40.00	
------------	---	-------	--

### 12.4 Minimum Lead Cost

This is the Minimum Lead Cost that the software should sell leads from this campaign for when sold live. The software can alter prices many ways depending on other factors you set on this page and in other areas of the software, yet you can rest assured that the price of leads sold from this campaign will never drop below the value you enter here.

Minimum Lead Cost	?	20.00
-------------------	---	-------

### 12.5 Maximum Lead Cost

This is the highest price that the software should ever sell leads from this campaign for when sold live. You can be certain that the price of leads sold from this campaign will never go above the value you enter here.

**Instant Leads Generator** 

### 12.6 Predefined Fields

This is where you select which predefined fields you would like to use in your campaign.

Predefined fields are useful for collecting basic data like name, address, phone number etc and you can select here which predefined fields you would like to use in your campaign.

Predefined Fields	?	
Email		≤
First Name		≤
L aat Nama		<b>S</b>
Last Name		<b>S</b>
Address		9
City		~
State/Province		
Postal/ZIP Code		
Exact Match Zip		
Country		
Phone		
Phone		
Fax		ā .
Age		
Nationality		

Predefined fields <u>can also have their</u> <u>data hidden in the Cherry Picker</u> (search for leads system) and in Ping-Post emails until after a lead has been purchased as this screenshot from the buyer's Search for Leads page shows.

٥	Campaign	٥	Email	٥	Address	\$
	Irish Life Assurance - New		(HIDDEN)		(HIDDEN)	
	Irish Life Assurance - New		(HIDDEN)		(HIDDEN)	
	Irish Life Assurance - New		(HIDDEN)		(HIDDEN)	

Although predefined fields are useful for gathering basic information and data that should be hidden until after a lead has been purchased, *Custom Questions allow FAR greater flexibility* than predefined fields and can incorporate such things as exact match filter functionality.

In most cases it's MUCH better to use custom questions instead of predefined fields.

There is one exception and this is the Exact Match Zip field.

### 12.7 Exact Match Zip Codes

Underneath Postal/ZIP Code there is a checkbox named "Exact Match Zip.

This allows your buyers and sales agents to have the ability to filter the leads that they want to receive by zip codes.

You need to check both boxes: "Postal/ZIP code" and "Exact Match Zip" in order for the zip code exact match filtration to work. You cannot check the box on the exact match zip only.

Postal/ZIP Code Exact Match Zip

On the buyer's filter page, a text box for zip code will appear. The buyer must enter the zip codes that he/she wishes to receive their leads from. The buyer can enter as many zip codes as he/she wants. Each zip code must be separated by a comma.

The following is an example: 1324, qdf 35e, 325 535, dDf998, 89098,34344

As you can see, the buyer can enter zip codes that include upper case and lower case letters (eg: UK postcodes), and numbers (eg: US zip codes) and these can include spaces if necessary.

The software is not case sensitive for zip codes and will ignore spaces. This means that zip code TUD 345 is the same with tud 345 and TUD345.

Also, a buyer can get a specific range of zip codes if they choose to do so. For example they could receive leads from all zip codes that start with 11 if they enter 11*** etc

If the buyer would like to receive all leads zip codes, they just have to leave the textbox blank.

### 12.8 Custom Questions

As mentioned above *custom questions are far more flexible* than predefined fields (with the exception of exact match zip codes) as they allow a much greater degree of control and flexibility.

Enter the questions you become available. If you	wish to I leave th	ask the user here. If you need more space, save the campaign without activating it, e answers box blank, a text field will be created. Otherwise, add an answer on eac	and more fields will h line.
Question 0	?	County	
		Answers 0	
		Antrim	
		Armagh	
		Carlow	
		Cavan	~
		Clare	- 11
Min 0	?		
Max 0	?		
Exact Match 0	?		
Is multiple checkboxes 0	?	•	
Text Box Exact Match 0	?		

### 12.9 Question Fields

You need to enter the exact question that you want to add to your lead capture form.

Question 1	?	

## 12.10 Answer Fields

In this larger field there are 3 ways to create and price an answer:

#### Creating a Text Box:

To create a text box on the lead capture form you can simply leave the answers field blank.

Instant Leads Generator 10.1.1 User Guide	Copyright 2013	Page 66
of 96		

Creating a Dropdown: To create a dropdown box with a selection of answers to choose from then simply enter the answers one per line. Remember to hit the enter key after each questions.	Credit Ratin	g Excellent Credit Good Credit Average Credit Bad Credit
<ul> <li>For example, you might have 4 answers as follows:</li> <li>Excellent Credit</li> <li>Good Credit</li> <li>Average Credit</li> <li>Bad Credit</li> </ul>		
<u>Creating a Checkbox:</u> To create a list of checkboxes follow the instructions above but also remember to check the "Is Multiple Checkboxes" field.	Credit Rating	g Excellent Credit Good Credit Average Credit Bad Credit
<i>Exact Match</i> The Exact Match function allows you to create powerful buyer	filters. Exac	t Match 0 🔽 🕑

When you select the exact match checkbox the question changes from a standard question into one that allows leads to be filtered and distributed to buyers based on the selections the lead makes on the lead capture form.

The lead capture form itself does not change in appearance. However, when a buyer subscribes to receive lead from a campaign that includes exact match questions they will be able to view the exact match questions you have created and then select the answers that they want to receive.

	Age	20-30 years
Here is what this looks like on a buyer's Select		30-40 years
Filters page (where the custom guestion is "Age"):		40-50 years
		🎽 50-60 years
		60-70 years
		70+ years
	Save Filters	

**Instant Leads Generator** 

So let's have a look at setting up a basic example:

Question: What is your current credit rating?

Answers:

- Poor
- Fair
- Good
- Excellent

On the buyer's Select Filters page they could make selections to receive leads who have only answered Good or Excellent. Or if they prefer they could select every answer, providing they are happy to receive leads containing any of these answers.

**Note:** This feature can be a great one or it can cause you a lot of problems. If correctly set up then it is an awesome feature that most lead sellers simply don't offer their clients. If incorrectly used (for example if you make several questions exact matched) then it could mean that your clients become too fussy and only choose to buy very specific selections of leads. The end result is that you may generate 100 leads and only sell 3 of them! So please be very thoughtful when deciding which questions to make exact match. We recommend that you limit this to one or two questions.

### 12.11 Max – Maximum Selection Length

The Maximum Selection Length function allows you to limit the	Max 1	?	25
amount of answers that a lead can select in a list of checkboxes,	or the number of	charac	cters
that the lead can enter into a text box.			

If the user selects too many answers in a checkbox list and then clicks submit, a pop up box will explain how to correct the error so they can submit the form correctly.

### 12.12 Min – Minimum Selection Length

The Minimum Selection Length function allows you to ensure Min 1 1 10 that each lead selects at least a certain number of answers in a list of checkboxes, or that they enter at least a certain number of characters into a text box.

If the user does not select enough answers in a checkbox list or enters too few in a text box and then clicks submit, a pop up box will explain how to correct the error so they can submit the form correctly.

### 12.13 Text Box Exact Match

When you select this option the exact match question will be created, but instead of displaying it as a dropdown or checkbox, it will appear

Text Box Exact 👔 🥑

on the lead capture form as text box where the user can enter text. It is not case sensitive and leads will be distributed to buyers whenever text entered on the lead capture form matches a buyer filter.

### 12.14 Creating Additional Custom Questions

Whenever you create a new campaign only four custom questions will appear on the Campaign Setup page. However, when you save the campaign and reopen it by clicking its edit button you will find that another four blank custom questions will appear at the bottom of the page.

Actions			
Delete	Edit	IF/AND statements	Show
Delete	Edit	IF/AND statements	Show
Delete	Edit	IF/AND statements	Show
Delete	Edit	IF/AND statements	Show
Delete	Edit	IF/AND statements	Show

By repeating this process of adding custom questions, saving the campaign and editing it again, you can add as many custom questions as you wish to any campaign.

**Instant Leads Generator** 

Note: IF/AND Statements only Applies to Leads Delivered Live.

#### WARNING:

Please use this feature with caution as its complex and easy to make mistakes!

In most cases, you should just set a price per lead at the top of the Campaign's "Edit Campaign" page and then use buyer ratios to vary the price for each buyer.

The IF/AND Statement system is complex and allows you to price leads based on the choices the lead makes when filling out the lead capture form.

It allows you to increase or decrease the price of leads depending on what combination of selections the lead makes.

When you open the IF/AND Statements page your software automatically predefines the questions you have already created. You can then create statements about these questions that the software will use to further price *live leads* the moment a lead arrives into your system.



The following image gives some examples of how to create IF/AND Statements:



In the above example there are 3 statements created to alter the prices of the leads:

### Statement 1: (1:1 and 1:2) and (2:5 or 2:2) =+10

This statement asserts that if the lead selects answer 1 AND answer 2 of question 1 plus also selects answer 2 OR answer 5 of question 2 then add \$10 to the base price of the lead.

### Statement 2: (1:3 or 1:2) and (2:2 and 2:1) =+25

This statement asserts that if the lead selects answer 3 OR answer 2 of question 1 PLUS also selects answer 2 OR answer 1 of question 2 then add \$25 to the base price of the lead.

### Statement 3: (1:1 and 1:2) and (2:2 or 2:3) =-5

This statement asserts that if the lead selects answer 1 OR answer 2 of question 1 OR selects answer 2 OR answer 3 of question 2 then subtract \$5 to the base price of the lead.

**Instant Leads Generator** 

Here is Another Example:

1:2=+2 would mean that if the lead selects answer 2 in the first question, then the lead price would be increased by \$2

1:3=+5 would mean that if the lead selects answer 3 in the first question, then the lead price would be increased by \$5

2:5=-7 would mean that if the lead selects answer 5 in the second question, then the lead price would be decreased by \$7

# **Note:** These are before any buyer/affiliate ratio is applied. The buyer/affiliate ratios that you have set will ultimately affect the final price buyers pay, and how much commission an affiliate is credited by.

### Another Example:

(1:1 and 4:1) = +20 In this case if the lead selects answer 1 from question 1, and also selects answer 1 from question 4, then the lead price will be increased by \$20.

When using these pricing statements, please be careful to create statements that don't conflict. If you create a statement, and then further down the page create another statement that conflicts the first one ....then the first one will dominate while the second one will be ignored.

In most cases, most users of the software just set a price per lead at the top of the "Edit Campaign" page. Of course, if you need to change the price of the lead based on the actually data that leads enter, you will indeed need to use the Statements boxes as described above.

### Please Note:

This feature works very well, yet we have always kept the feature in BETA status due to many customers creating statements that are so complex that they end up making mistakes. When mistakes are made it can be very time consuming. Therefore, tech support is not available for this feature. However, if you use the examples given above and test your selections by buying leads and carefully checking the pricing models you create then you can experience a whole new dimension to lead pricing limited only by your imagination!

Instant Leads Generator 10.1.1 User Guide of 96
### 13 Putting your Campaign Live

As soon as you have completed the setup of your campaign you need to test it by pasting the lead capture form into a live web page.

#### 13.1 Creating & Integrating a Lead Form to your Web Page

Once you have fully completed creating your campaign, you can click the campaign's "show"

Back

Forward

#### How To Make This Lead Capture Page Work

#### Congratulations! You have completed your Lead Capture Page.

You may save this file (File Save As) and edit it to suit your web interface. A basic stylesheet is included in the header of this file, which you may either merge into your existing stylesheet or edit in place to customize the look of the page to suit where it will be placed on your website.

Before using your template you need to replace the following text in the source code http://www.yourdomain.com/software_directory/ with your domain URL and software directory location for the form to correctly post to your software from anywhere on the internet.

If you dont already have a page in mind then we have almost 30 pre-built example pages that you can edit and insert the code into. <u>Click Here To Start Download</u>.

	Reload
Email:	Save as Print
First Name:	Translate to English
Last Name:	View page source
	view page into
	Inspect element
Address:	
County	
Phone	
Mobile Phone	
Age	•
Gender	<b>v</b>
Do You Smoke?	<b>v</b>
Life Assurance Required	•
Serious Illness Cover	•
Term of Insurance	•
Terms & Conditions	I have read and agree to the Terms & Conditions
Submit	

button.

When you do this your new lead capture form will open, which may look something like this.

You now need to right click anywhere on the form and select "View page source" or "View source".

When you do this you will see the page code and can copy and paste it into your html editor or web design program.

You can then remove any unwanted text from the top portion of the form.

**Instant Leads Generator** 

Copyright 2013

Page 73 of 96

You can also format the form to suit the look and feel of the web page into which you will be pasting it.

#### VITAL:

Before you can paste the form into your web page you need to make one tiny change to it.

You need to search for the following line: <form method="post" action="http://www.yourdomain.com/software_directory/addlead.php" name="data_form" id="data_form">

You now need to replace <a href="http://www.yourdomain.com/software_directory">http://www.yourdomain.com/software_directory</a> with the actual URL of your own system.

Once you have done this you can paste the completed form into your web page and can start sending test leads into the system, which will be delivered automatically and instantly to your lead buyers (providing you have set their filters correctly and funded their accounts).

#### Please Note:

In addition to making sure that you point the live form to the URL of your addlead.php file as mentioned above there is something else you need to know.

The actual form code itself starts here:

```
<form method="post"
action="http://www.yourdomain.com/software_directory/addlead.php"
name="data_form" id="data_form">
```

and ends here:

```
<!-- <input type="hidden" name="ans" value="Array"> -->
</form>
```

This is the only part of the code that that you need to paste into your lead capture page for your form to appear in it.

```
Instant Leads Generator 10.1.1 User Guide of 96
```

However, you must also paste the following code between the <head> and </head> tags at the top of every web page that will use the form:

```
<script type="text/javascript">
  max = new Array();
  min = new Array();
  answer = new Array();
</script>
<style>
table.formbox {
      padding: 0px;
      width: 90%;
}
table.formbox td.header {
      font-weight: bold;
      padding: 5px;
}
table.formbox td.label {
      vertical-align: top;
      text-align: right;
      width: 60%;
}
table.formbox td.control {
      vertical-align: top;
}
table.formbox td.caption {
      padding: 1em;
      color: #000044;
      font-size: 60%;
}
</style>
```

This code is very important and always appears at the top of any form that the software creates for you when you click the campaign's "show" button.

**Instant Leads Generator** 

# 14 Cherry Picker System

Buyers can use the Search for Leads (Cherry Picker) system to find and purchase aged leads that are unsold, or that have not yet been sold the maximum number of times set for that particular lead type.

Leads that have just been purchased will immediately appear at the top of the leads list on the My Leads page. Data from certain fields can be hidden on the results page until a lead is purchased.

	earch for	Leads											0
Insura	nce 🔻												
											s	Search:	
	First Name 🗘	Last Name 🗘	Campaign 🗘	Email 🗘	Address \$	City 🗘	Zip 🗘	State 🗘	Phone 🗘	Price 🗘	Lead Age 🔺	Times Sold 💲	View Details
	Rupie	Pettigrew	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	1	0	View
	Mary	Gallagher	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	114	0	View
	Robert	Kee	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	128	0	View
	Anne Marie	Devlin	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	128	0	View
			Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	138	0	View
	Claire	Cosgrove	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	140	0	View
	Itzwmuqu	Itzwmuqu	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	150	0	View
	Arun kumar		Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	150	0	View
	Gary	Martin	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	151	0	View
	Ciaran	Beirne	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	152	0	View
	patrick	kearney	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	152	0	View
	peter	ahearn	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)					35.00	157	0	View
	mjrnbovuuh	mjrnbovuuh	Life Assurance - BetterQuotes.ie	(HIDDEN)	(HIDDEN)					35.00	158	0	View
	iqnInbbvek	iqnInbbvek	Life Assurance - BetterQuotes.ie	(HIDDEN)	(HIDDEN)					35.00	159	0	View
	bpoesedjbq	bpoesedjbq	Life Assurance - BetterQuotes.ie	(HIDDEN)	(HIDDEN)					35.00	161	0	View
	Fergal	Connellan	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	181	0	View
	Lisa	Mc Cabe	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	182	0	View
	afaf	adfa	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	183	0	View
	180	180	Irish Life Assurance	(HIDDEN)	(HIDDEN)					35.00	183	0	View
	qnzsiogmvk	qnzsiogmvk	Life Assurance - BetterQuotes.ie	(HIDDEN)	(HIDDEN)					35.00	193	0	View
Showin	g 1 to 20 of 202 e	ntries								I	First Previou	s 1 2 3 4	5 Next Last

Here is a screenshot of the buyer's Search for Leads page:

There are a few steps you need to take to setup the Cherry Picking system and these are described in detail below.

Instant Leads Generator 10.1.1 User Guide of 96

### 14.1 Pricing Schedules & Searchable Categories

To setup the Search for Leads (Cherry Picker system) you firstly need to setup a pricing schedule, which you then associate with a campaign.

You also need to create a category for the campaign such as "Insurance" and also associate it with the same campaign. You can setup or edit pricing schedules and categories in the Campaigns Control Panel.

You associate the pricing schedule and the searchable category for any campaign in the admin panel, by going to Campaign Settings, and clicking the "Settings" button for the campaign and selecting the pricing schedule and category from the dropdowns.

Here is what it looks like:

Dashboard	Users 🗸	Campaigns 🗸	Leads 🗸	System Settings v	Reports	Email System 🗸	
Cam	npaigr	n Setting	S Camp Sell A	paign Price Schedule As Aged Using This Price	Schedule:	Cherry Picker - Life	
			Mark Send	Leads Searchable Via Th Successful Lead To This	is Category:	Insurance http://www.bestinsurancequotes.ie/th	

Once you do this, any buyer who is subscribed to this campaign will be able to search for, find and buy aged/unsold leads on their Search for Leads page. However, please note that the buyer can only search for leads in the campaigns that they are subscribed to, and other campaigns that they are not subscribed to will remain invisible to them.

**Instant Leads Generator** 

#### 14.2 Setting up Pricing Schedules

Pricing schedules are only used when selling aged leads and they are unnecessary for leads that are being sold live to buyers. You can setup or edit pricing schedules by going to Pricing Schedules from the Campaigns Control Panel.



Here is a screenshot of a typical pricing schedule:

Price ee	bedule:		all Multiple Times								
nee se	neuure.		all Multiple Time		]						
escrip	tion	2	eri Murcipie iime								
ffective	:	2	009-11-30								
xpire:		2	020-10-30								
tart Po	int:	2 1									
	Field Name 🛛		Description 7	Price/Pct. 7	Calc/Days 7	X Sold	? Pct. ?	Aging	7 Field Cost 7	Hide Result	Active
		· · · · ·	First Time Sold	28.00	0	<b>S</b>	Θ	۲	Θ		₹
9	Additional Field	•	2 days old	9.00	2		Θ	۲	Θ		<b>S</b>
)	Additional Field	•	5 days old	14.00	5	•		<b>S</b>	Θ		
9	Additional Field	•	7 days old	19.00	7	•		<b>S</b>	Θ	Θ	
9	Additional Field	•	8 days old	20.00	8	•	Θ	<b>S</b>	Θ	Θ	
9	Additional Field	•	10 days old	23.00	10	•	Ξ	3	•	Θ	≤
)	Lead Master - Zip	•		0.00	0	9	Θ	Θ	Θ	<b>S</b>	<b>S</b>
)	Lead Master - Email	•		0.00	0		Θ		9	<b>S</b>	≤
						- 0				≤	<

Instant Leads Generator 10.1.1 User Guide of 96

In the above example, aged leads being sold through the cherry picker system would receive their leads for \$28 for the first 24 hours.

- On the 2nd day the price is reduced by \$9, so the cost would be \$19
- Then, on the 5th day the price drops even further by \$14, so the cost would be \$14
- On the 7th day the price drops again, this time by \$19, so the cost would be \$9
- Then, on the 8th day the price drops even further by \$20, so the cost would be \$8
- Finally on the 10th day the price drops by a further \$23 so the lead price will stay at \$5

Underneath the main statements, you see 3 more selections; Leads Master – Zip, Leads Master – Email, and Leads Master – Last Name.

Also, you will notice that it's possible to hide any of these predefined fields (eg: zip, email address, lastname etc) until the buyer has actually bought the lead. You do this by checking the "Hide Result" box for the field you wish to hide as shown above.

Once you have completed creating your pricing schedule and category and assigned these to the campaign as described above your buyers should be able to search for their leads according to the pricing schedule you have set up.

### **15 Reports Control Panel**

As admin you have access to a variety of useful reports on all your campaigns, buyers, and affiliates. These reports gives in-depth understanding about each of your campaigns, affiliates, lead buyers and sales agents. You will always know exactly what profits you are making from each of them and which ones are causing you problems.

Instantly spot those that are less than ideal and always be aware of which ones are sending back too many leads for refund. These reports will also enable you to instantly spot problematic lead sources and help you to fine tune every aspect of your business for maximum profitability.

Every report is fully customizable, so that you always know exactly whats happening with every lead buyer, sales agent, campaign and affiliate.

#### 15.1 Campaign Reports

The campaign reports will give you a detailed view on exactly how each of your campaigns is performing.

You can view all your campaigns between specific dates as well as detailed reports on a specific campaign. See tables and charts that include complete details of leads sold, refunded, refund rates and profits.

Irish Life Assuran	oe	7507		1328		1896	78245
atistics by M	Iont	h					
Date	\$	Leads Sold	٥	Refunded <	>	Refund Rate 🗘	Profit
Dec 2010		8		0	Τ	0%	170
Jan 2011		632		81		1396	8970
Feb 2011		559		61		1196	3530
Mar 2011		505		54		1196	4410
Apr 2011		423		71		1796	3510
May 2011		420		60		1496	4500
Jun 2011		402		108		28%	5770
Jul 2011		334		61		1896	3840
Aug 2011		365		53		1596	4115
Sep 2011		404		57		1496	4640
Oct 2011		325		48		15%	3245
Nov 2011		421		81		19%	4695
owing 1 to 12 of 2	3 ent	ries			Ċ		



Instant Leads Generator 10.1.1 User Guide of 96

#### 15.2 Affiliate Reports

The affiliate report will shows you exactly how each of your affiliates is performing.

You can view the performance of all your affiliates between specific dates as well as detailed reports on each individual affiliate.

See tables and charts that include full details of leads sold, refunded,





refund rates and earnings. Instantly spot those affiliates that are generating poor quality leads.

#### 15.3 Buyer Reports

The buyer report gives you detailed information on every one of your buyers. See at a glance

who your best buyers are and those who are losing you money.

You can also view the performance of specific buyers and between specific dates. Detailed reports include full details of the number of leads sold to each buyer, the

Buyer Name 🗘	Leads Sold 🗘	Refunded 🗘	Refund Rate 🗘	Profit 🔻	
Eamonn Freeman	1866	708	38%	35035	
Paul Fitzpatrick	379	137	38%	8345	
Ollie Moran	342	151	44%	7640	
Pascal Curran	292	94	3296	7480	
Aine Derham	299	111	3796	7330	
Eamonn Freeman	387	128	35%	5790	
Anthony Curran	228	103	45%	5000	
Richard Barr	235	110	4796	4910	
PJ Farrell	2168	0	0.96	4600	
John Butler	147	55	3796	3680	
Dave Croucher	109	42	39%	2680	
David Walsh	78	16	2196	2400	
Showing 1 to 12 of 55 entr	ies			5 Next Last	



number refunded, the refund rates and the profits the buyer is making for you.

Lead Buyer Statistics

**Instant Leads Generator** 

## 16 Email Control Panel

The Email Control Panel allows you to email a message all your buyers and/or affiliates in one go. You can also edit the autoresponder email messages that the system sends to users automatically.



#### 16.1 Templates

This allows you to edit the text in the autoresponse email messages that the system sends out for you automatically. You will need to change such things as your company name and address and any URLs that you need in those autoresponse messages.



Instant Leads Generator 10.1.1 User Guide of 96

### 16.2 Email Users

The Email Users facility allows you to email a message all your buyers and/or affiliates in one go. You simply select those users you wish to send the message to, enter the text of the email and click the Send Email button.



shboard	Users v Campaigns v	Leads v Syste	em Settings v Reports	Email System 🗸	$^{\mathcal{P}}$ live search demo	
<b>Emai</b>	il Users 🛛					0
🖻 Who joine	ed between				and	
🔍 Who earn	ed 🔘 MORE 🔘 LESS tha	an EUR	between		and	
🔊 Top 10 Ea	arners between				and	
∂ All Affiliate ∂ DO NOT i	es nclude Affiliates					
ustomers						
🖻 Who joine	ed between				and	
🔍 Who sper	nt 🔘 MORE 🔘 LESS than	EUR	between		and	
🔍 Top Set N	lumber of spenders betwee	n			and	
<ul> <li>All Custor</li> <li>DO NOT i</li> <li>det Email Addre</li> </ul>	mers nclude Customers					
All Custor DO NOT i Bet Email Addre mail Form	mers nclude Customers					
All Custor DO NOT i Set Email Addre mail Form o:	mers nclude Customers					
<ul> <li>All Custor</li> <li>DO NOT i</li> <li>Bet Email Addre</li> <li>mail Form</li> <li>o:</li> <li>ubject:</li> </ul>	mers nclude Customers	antLeads				
<ul> <li>All Custor</li> <li>DO NOT i</li> <li>Bet Email Addree</li> <li>mail Form</li> <li>o:</li> <li>ubject:</li> <li>essage:</li> </ul>	New message from Insta B New message from Insta New message from Insta I I I I I I I I I I I I I I I I I I I	ant Leads ▲ 원   = = = = 	■ Styles • Forma   葉 年 (*   • ) (*   •   Ⅲ Ⅲ   — 2 Ⅲ   ▲ ☞   ¶ № 〒 믂	t ▼ Font family ≥ ∰ ① 墜 ③ ① ×₂ ײ   Ω ② ■	Font size     Font size	<u>-</u> - <u>•</u> -

**Instant Leads Generator** 

Copyright 2013

Page 83 of 96

## 1 Appendix A – Installing the Software

Instant Leads Generator can be installed on most modern Unix/Linux servers running PHP 5 and above with MySQL 5 and above.

When you purchase Instant Leads Generator the software will be installed for you at no cost. It is well worth availing of this free installation service as it can save you time and minimises your need for tech support. We offer a 24 hour turn around time on all new software installations (except at weekends).

However, if you wish to install the system yourself you are welcome to do so. To do this correctly, you will need some basic understanding of installing scripts and databases as well as using FTP.

The following are the steps required to install Instant Leads Generator on your server.

#### 1.1 Step 1

First download and unzip the latest version.

#### 1.2 Step 2

Upload the contents of the unzipped folder to a folder that is in the root of your domain. For example www.domain_name.com/leads/ is fine, but www.domain_name.com/directory/leads/ will not allow the software to function correctly.

For the purposes of this installation example we will be using a folder named "leads".

Instant Leads Generator 10.1.1 User Guide	Copyright 2013	Page 84
of 96		

#### 1.3 Step 3

Next use your FTP client to set the permissions of the files in your "leads" folder as follows: The /templates folder, the /images folder and the /client_documents folder (and any files inside these folders) must all have their permissions set to 777.

#### 1.4 Step 4

Once you have completed this, go to your web servers control panel and create a new database and a new MySQL user account, and assign ALL permissions to it.

#### 1.5 Step 5

Next go to PHPMyAdmin and import the database file named "database.sql" in your software's Sql folder.

#### 1.6 Step 6

Next you need to edit the config.php file which is found in your software's inc folder. You can edit this file using notepad. To do this, right click the config.php file and select "Open with", and select Notepad. Next, substitute the correct values for your MySQL database into the following sections and save the file: YOUR_DATABASE_NAME YOUR_DATABASE_USERNAME YOUR_DATABASE_PASSWORD http://DOMAIN_NAME/SOFTWARE_DIRECTORY/ PAYPAL_EMAIL_ADDRESS

**Instant Leads Generator** 

### 1.7 Step 7

Upload the edited config.php file by FTP to the "inc" folder of your new installation.

#### **CONGRATULATIONS!**

You have now successfully installed the latest version of Instant Leads Generator and you can login by going to the URL of the login page.

In our example above it is http://www.domain_name.com/leads/

## 2 Appendix B – Upgrading from a Previous Version

The following is a description of the process for upgrading from earlier versions of Instant Leads Generator. There are several ways in which this can be achieved, but we have found that the following method if followed to the letter will be the quickest and most problem free method.

Please follow the steps below to upgrade your current version.

#### 2.1 Step 1

First download and unzip the latest version of the software.

#### 2.2 Step 2

Upload the contents of the unzipped folder to a brand new folder named "upgrade" that is in the root of your domain, for example <u>www.domain_name.com/upgrade/</u> is fine, but <u>www.domain_name.com/directory/uprgade/</u> will not allow the software to function correctly.

#### 2.3 Step 3

Next use your FTP client to set the permissions of the files in your "upgrade" folder as follows: The /templates folder, the /images folder and the /client_documents folder (and any files inside these folders) need to be set to 777.

**Instant Leads Generator** 

### 2.4 Step 4

Next, download from your old installation the following files: config.php from your software's "inc"folder email.itt from your "templates" folder logo.gif from your "images" folder.

#### 2.5 Step 5

Once you have completed this, go to your web servers control panel and create a NEW database and a NEW MySQL user account, and assign ALL permissions to it.

#### 2.6 Step 6

Next edit the config.php file you downloaded in step 4 above using notepad. To do this, right click the config.php file and select "Open with", and select Notepad.

In Notepad substitute the correct values for your NEW MySQL database into the following sections:

YOUR_DATABASE_NAME YOUR_DATABASE_USERNAME YOUR_DATABASE_PASSWORD http://DOMAIN_NAME/upgrade/ PAYPAL_EMAIL_ADDRESS

#### 2.7 Step 7

- Upload the edited config.php file by FTP to the "inc" folder of your new installation.
- Upload your original email.itt files (which you downloaded in step 4 above) to the "templates" folder in your new installation.
- Upload your logo to the "images" folder, but this time it should be uploaded as a PNG file with a transparent background with maximum dimensions of 184 pixels x 45 pixels.

#### 2.8 Step 8

Next, <u>take a full backup of your original database</u> (you should backup you database at least once a week anyway to avoid data loss and this should already be a familiar process to you). To do this please use the following settings and save the file as: full_original_database

SQL options
Add custom comment into header (\n splits lines):
Enclose export in a transaction
<ul> <li>Disable foreign key checks</li> </ul>
SQL export compatibility: NONE
┌ 🖉 Structure
Add DROP TABLE
Add IF NOT EXISTS
Add AUTO_INCREMENT value
Add into comments:
Creation/Update/Check dates
☑ Relations
MIME type
┌ 🔽 Data
Complete inserts
Extended inserts
Maximal length of created query: 50000
Use delayed inserts
Use hexadecimal for binary fields
Export type: INSERT

**Instant Leads Generator** 

Page 89 of 96

#### 2.9 Step 9

Next, using the same settings shown above, export the table named custom_fields and save this file as: custom_fields. You then need to save each of the tables for the days of the week (if they exist in your database): monday, tuesday, wednesday, thursday, friday, saturday and sunday.

#### 2.10 Step 10

Next, you need to export <u>only the data</u> from each of the tables of your original database, one by one using the settings shown below. Please make sure that you name each file with the same name as the table itself, but with the suffix "data_only" added to the name.



For example you should save the data from the table named "account" as account_data_only

The data from the table named "account_affiliate" as account_affiliate_data_only

The data from the table named "account_customer" as account_customer_data_only

You need to follow this same process for each and every table in your database, <u>except for the</u> <u>"custom fields" table</u> (you have

Instant Leads Generator 10.1.1 User Guide of 96

already saved this table along with its data in step 9 above).

#### 2.11 Step 11

Next go to the new database you created in step 5 above. Import the file named "database" (which is in your software's Sql folder) into the new database.

#### 2.12 Step 12

You now need to export the structure and relations (no data) of the database and name it structure_and_relations using these settings:



**Instant Leads Generator** 

Page 91 of 96

#### 2.13 Step 13

Now, delete all the tables and data from the database

#### 2.14 Step 14

Import the file named structure_and_relations into your database

#### 2.15 Step 15

Next, delete the table named "custom_fields" and also each of the day of the week tables: monday, tuesday, wednesday, thursday, friday, saturday and sunday

### 2.16 Step 16

Import the table named "custom_fields" which you created in step 9 above and then each of the day of the week tables: monday, tuesday, wednesday, thursday, friday, saturday and sunday

#### 2.17 Step 17

Next, go to each table in turn and import the data from the original database into it. In each case you must import the data from the table of the same name.

For example you would import into the table named "account" the file named account_data_only.

For the table named "account_affiliate" you need to import the file named account_affiliate_data_only.

You repeat this process for every table in your new database (for which a "data_only" file exists).

#### 2.18 Step 18

Now, login as admin and open this file: synch_ts.php

For example if your software folder's location is: <u>www.domain.com/upgrade/</u> then you will need to open this URL: <u>www.domain.com/upgrade/synch_ts.php</u>

Once you have done this, you need to go to your System Setup page and make any necessary modifications to those settings and click the "Save Configuration" button.

#### 2.19 Step 19

If you are upgrading from a version that is older than version 9v71 (which includes the lead delivery scheduling feature) you need to complete an additional step to ensure that this scheduling feature works correctly. If you do not complete this step then delivery scheduling will not take place and live leads will not be delivered into buyer accounts that are subscribed to campaigns.

**Instant Leads Generator** 

To ensure that delivery scheduling works correctly, you need to login to each of your buyer accounts and click the Edit Settings button for each campaign they are subscribed to.

You need to copy any autoresponse email message they have set on this page and you also need to make a note of each of their filter settings and their leads per day. Next you need to unsubscribe them from the campaign.

Next you need to subscribe them again to the campaign and you will notice that the buyer is now scheduled to receive live leads on every day of the week and every time of day. You should change these settings if required, remembering to enter their leads per day once again, any autoresponse email and also their filters.

### 2.20 Step 20

Edit an existing campaign's lead capture form so that it points to the upgrade software install folder, and test by creating a few live test leads. Providing live leads are sold and distributed to buyers correctly, you can rename your original software folder to "archive".

You can now rename your "upgrade" folder to the same name as your original software folder, remembering to also update the database and URL settings in your config.php file again to reflect that folder name change.

You have now upgraded to the latest version and can avail of all its new features and advantages!

#### 2.21 Upgrade Error Messages

Should you have any problems with the upgrade (which is possible depending on what version you are upgrading from), a slightly different upgrade procedure may be required. However, our tech support staff are available for complete the upgrade process for you, although there is a charge for using this service.

# 3 Appendix C – HTTP Posting Leads into Your System

Although many users post leads into their system using lead capture forms, it is also possible for affiliates and lead vendors to post lead data directly into your system using http post.

HTTP posts can at first appear quite complex, but are really quite straight forwards to setup.

The following is a detailed description of how this can be achieved:

#### 3.1 Understanding Field Names & Codes

Firstly, examine the code of your lead capture form, and you will see your predefined field names and custom question field names. You will also notice that each custom question field has a code beside it, such as ans_0[], ans_1[], ans_2[] etc.

ans_0[], ans_1[], ans_2[] etc represent answers to the custom questions you created when creating your campaign.

#### 3.2 Unique Campaign Identifier

Please also note that every lead campaign has a unique identifier number, and you can see this highlighted in green below. You can find this identifier at the end of your lead capture form code, just above the </form> tag.

**Instant Leads Generator** 

In the posting example below, the code at the bottom of the form and the campaign's unique identifier number would look something like the following:

<input type="hidden" name="campaign" value="10"><input type="hidden" name="cvfid" value="3a3ac65b4dbe4db9e6967d71dbc83152"><input type="hidden" name="campaign" value="0">

### 3.3 Posting Example

The following is a typical posting into a campaign with unique identifier "10".

Please also note the parts highlighted in blue – these are some typical custom questions that might be created in a campaign):

http://www.yourdomainname.com/yoursoftwarefolder/addlead.php?cl&campaign=10&email=john @johndoe.com&name1=John&name2=Doe&address=The Coach House, Newlands Cross West,&ans_0[]=County Tipperary&ans_1[]=800-930-8104&ans_2[]=800-930-8105&ans_3[]=selfemployed&ans_4[]=call evenings only

#### 3.4 Testing Your Posting

To test your post to ensure that it is correct, just copy your post text (like the above) and enter it onto your web browser's address bar and hit enter. This will allow you to test to ensure that the lead data is entering your system correctly.

Please Note:

When you are considering asking 3rd party lead vendors to post data directly into your live system, please start by testing in the manner described above. Once you are confident that it is working fine, just give the above description to your vendor, so they will understand the syntax that your system uses and understands. You will also need to give them every field name exactly as it appears on your campaign's lead capture form.

Instant Leads Generator 10.1.1 User Guide of 96