Instant Leads Generator version10.1

User Guide

Generate, Distribute and Manage Leads Automatically.

Date: 4th January 2013

Instant Leads Generator

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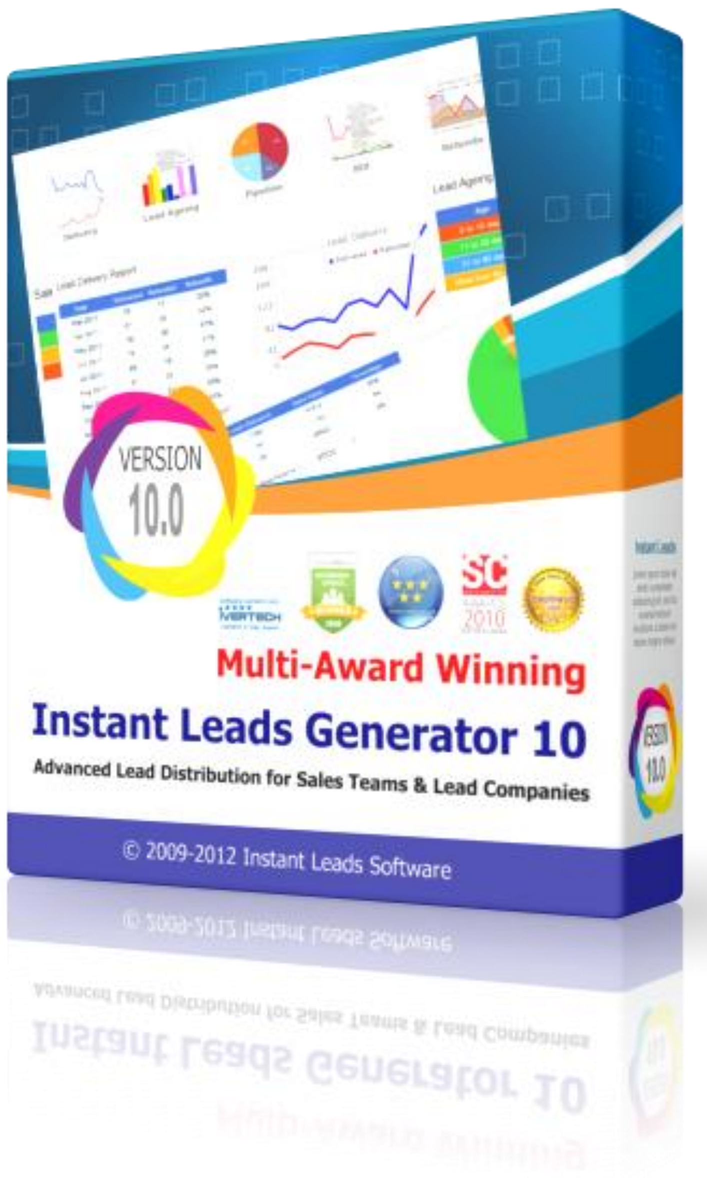

Instant Leads Software

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Instant-Leads.com

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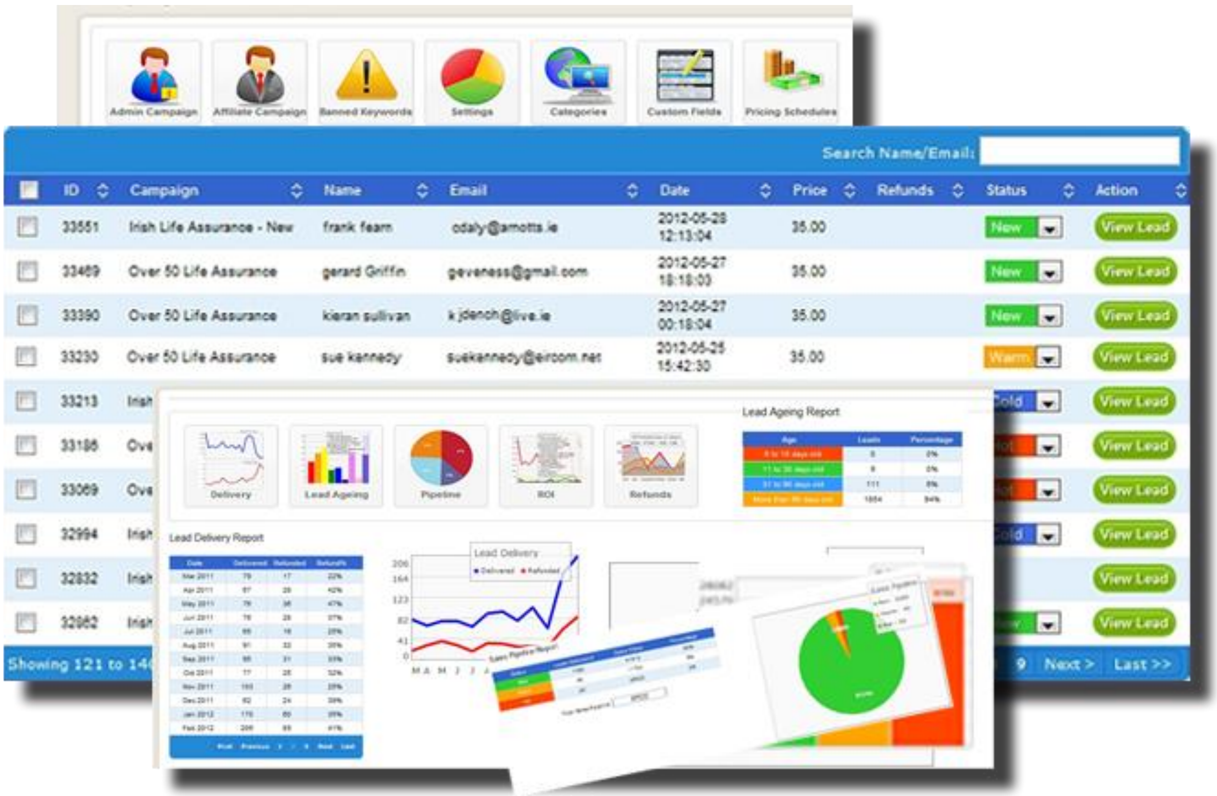
1 About This Guide



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.

2 Navigation and the Menu System

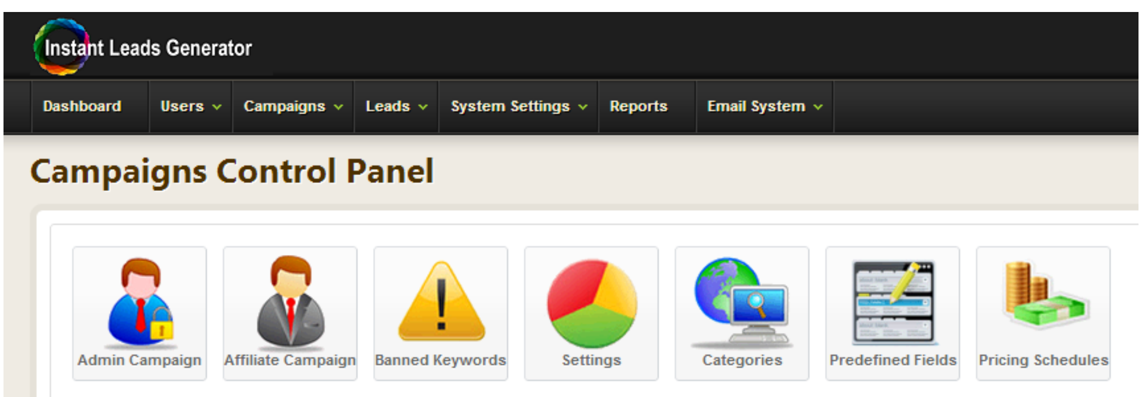
2.1 Menu System

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

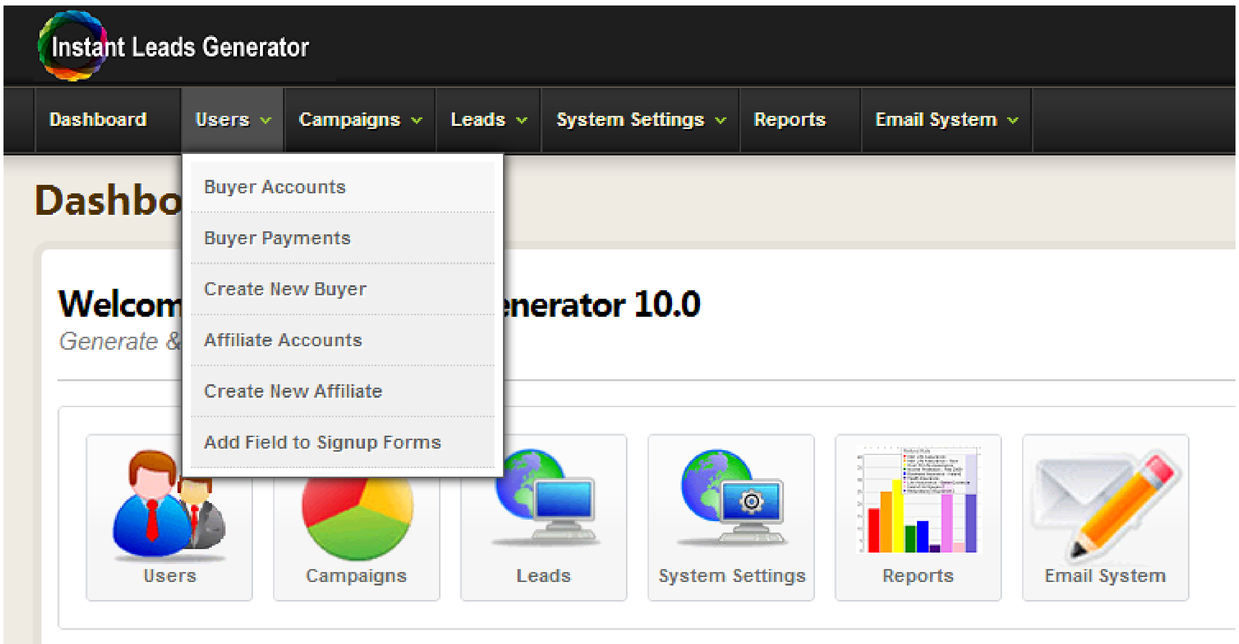
To do anything related to users simply click the “Users” icon in the Dashboard and you will enter the Users Control Panel. Here you can click on a number of other icons that will in turn give you access to all your user options.



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.

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:

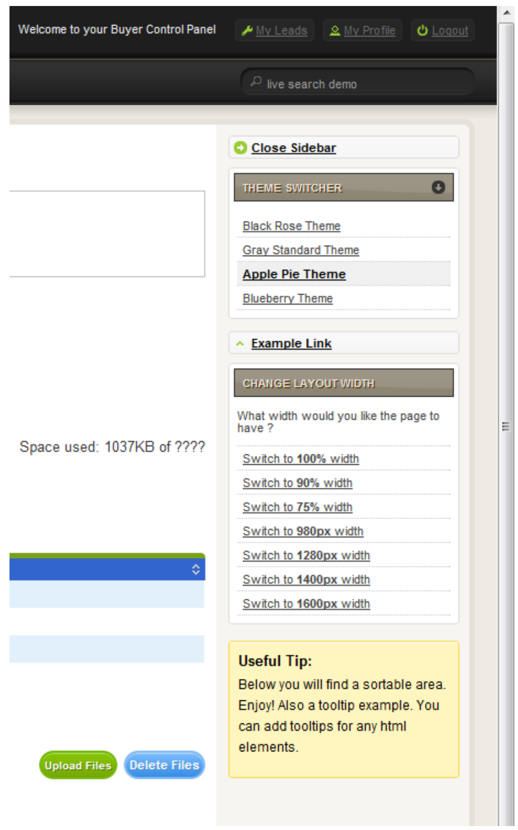


In the beginning while you are getting familiar with the software it's usually best to use the icons (navigation method 1) to navigate your way around the system.

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:

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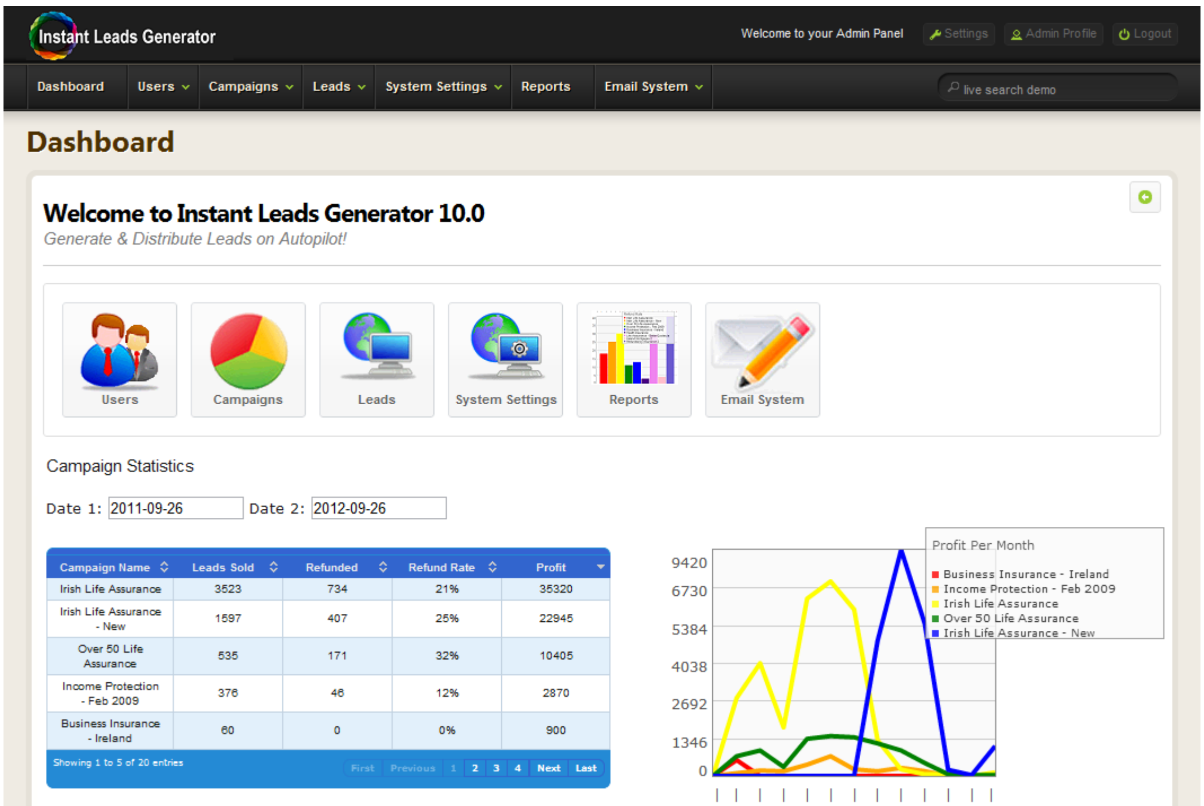
4 The Admin Dashboard

4.1 Login as Admin

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



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.

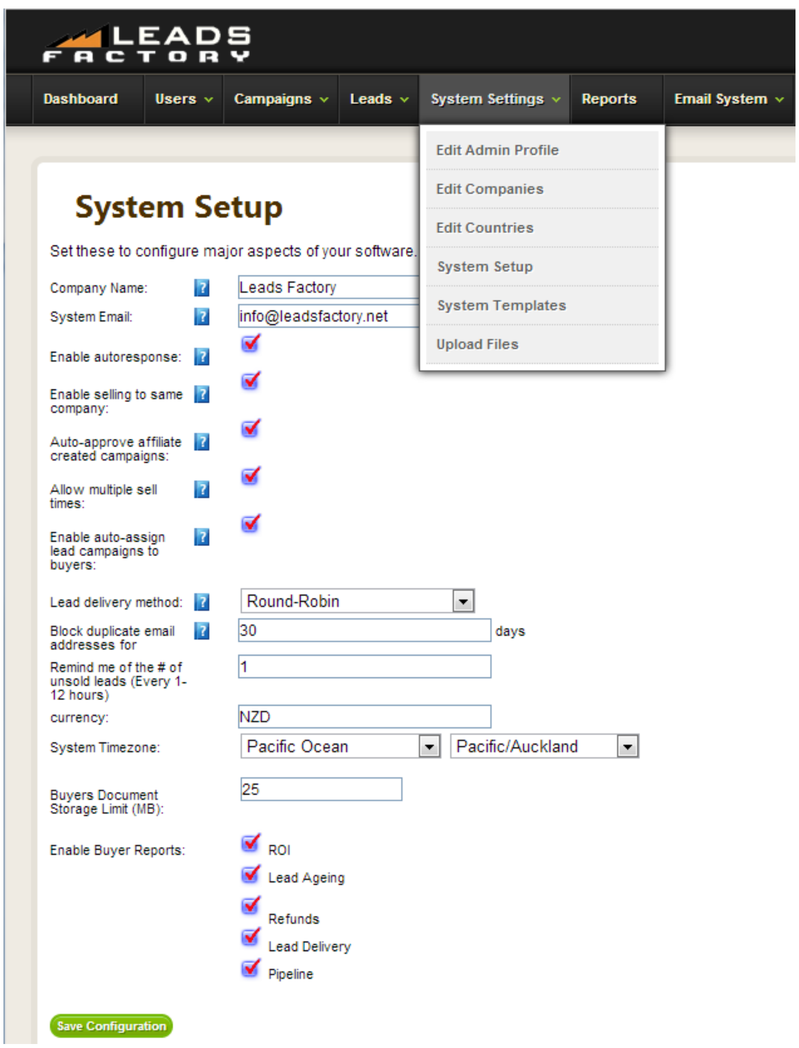
It gives you an illuminating snapshot of your entire business whenever you login to the system.

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.



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.

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				
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

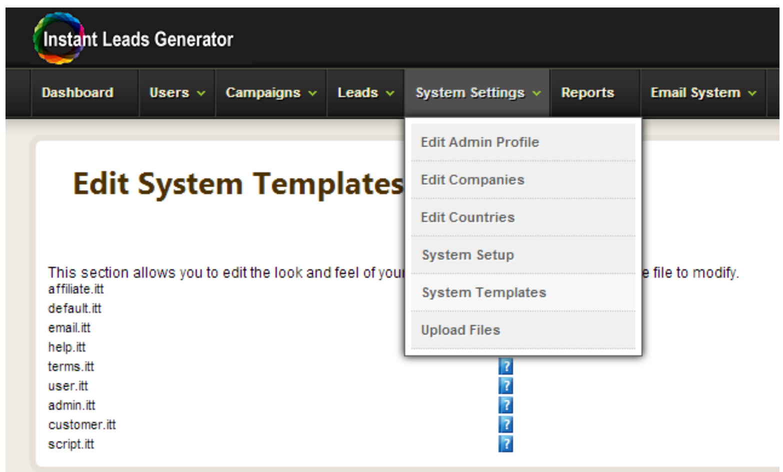
You can enable or disable the display of the various reports that your buyers and sales agents have access to. When you disable all of these reports by unchecking them all then the My Reports menu option will disappear from all buyer and sales agent accounts. Once you have completed making the selections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

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.

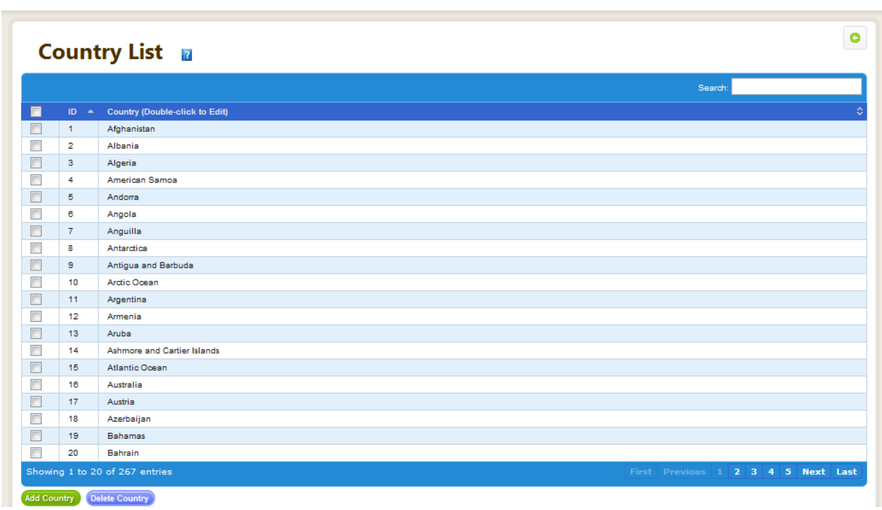
affiliate.itt

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

script.itt

This file should not be edited.

5.17 Edit Countries

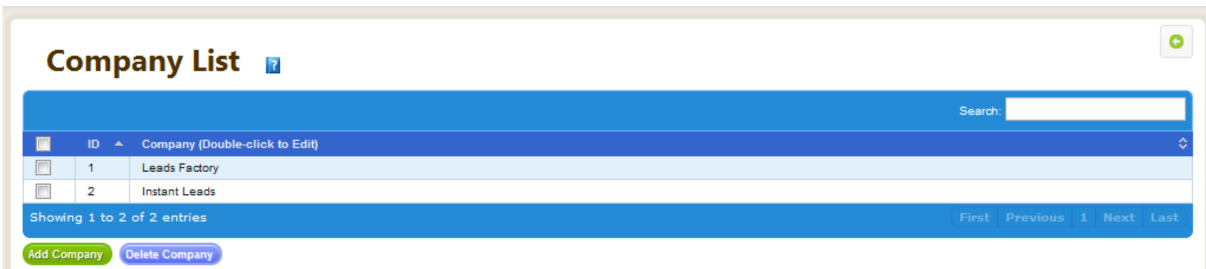


The Country file is used throughout the software.

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.

5.18 Edit Companies

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



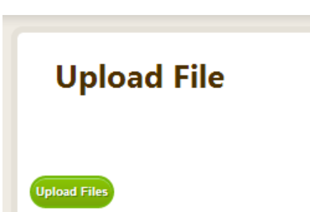
Please Note:

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 more than one time *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



This is where you can upload your logo to the images folder so that it shows up in the software's header bar.

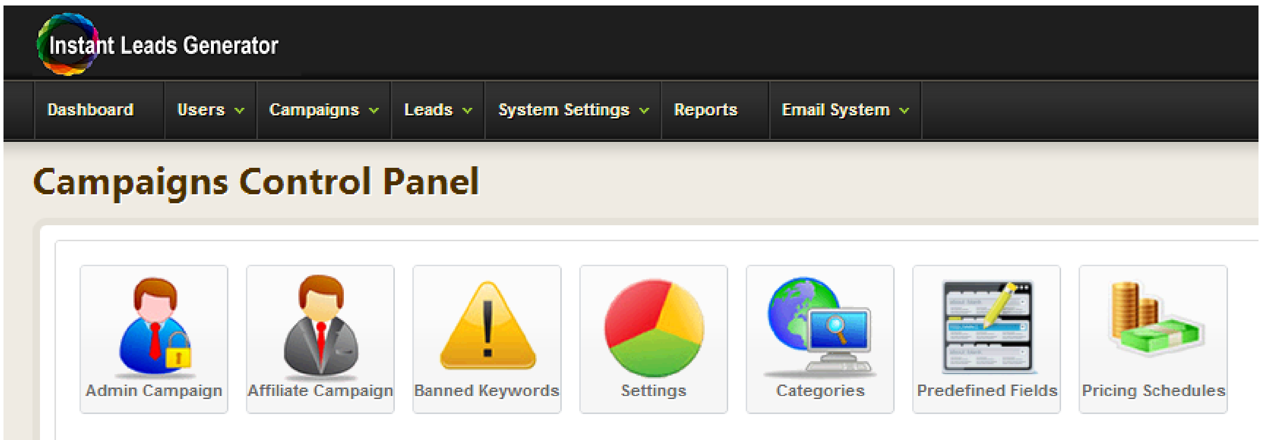
For best results your logo should be uploaded as a PNG file with a transparent background with maximum dimensions of 184 pixels x 45 pixels.

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.

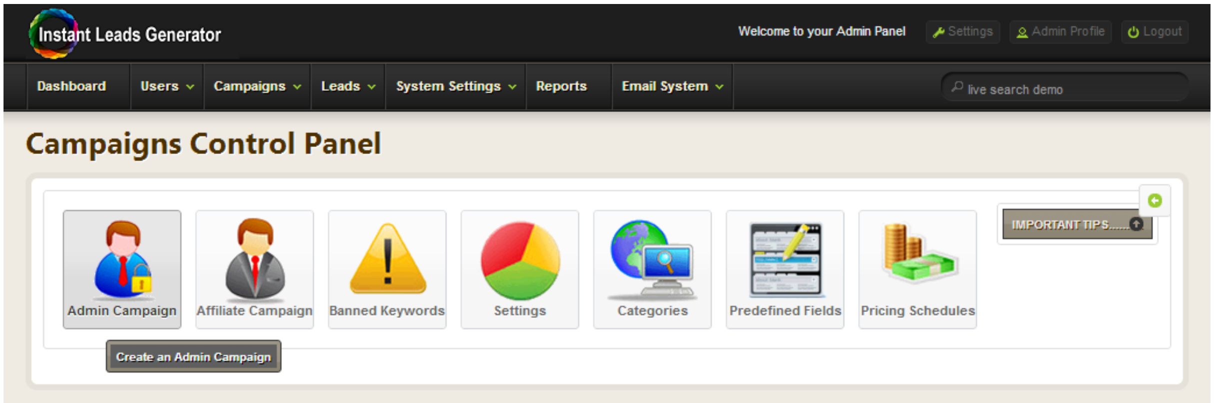


6.1 Admin Campaign

If you are generating your own leads then you should create your campaigns in your own affiliate account. This means that <u>you will always need at least one affiliate account for your own in-house use</u>.

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).

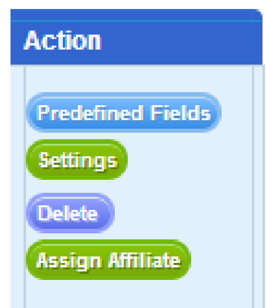
As admin, you can create Admin Campaigns in the Campaigns Control Panel by clicking the "Admin Campaigns" icon as shown below.



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.



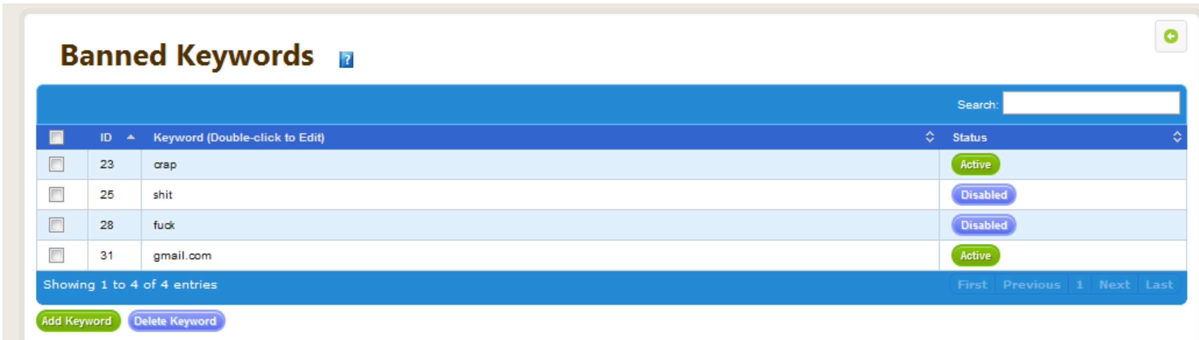
6.2 Affiliate Campaign

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.

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.



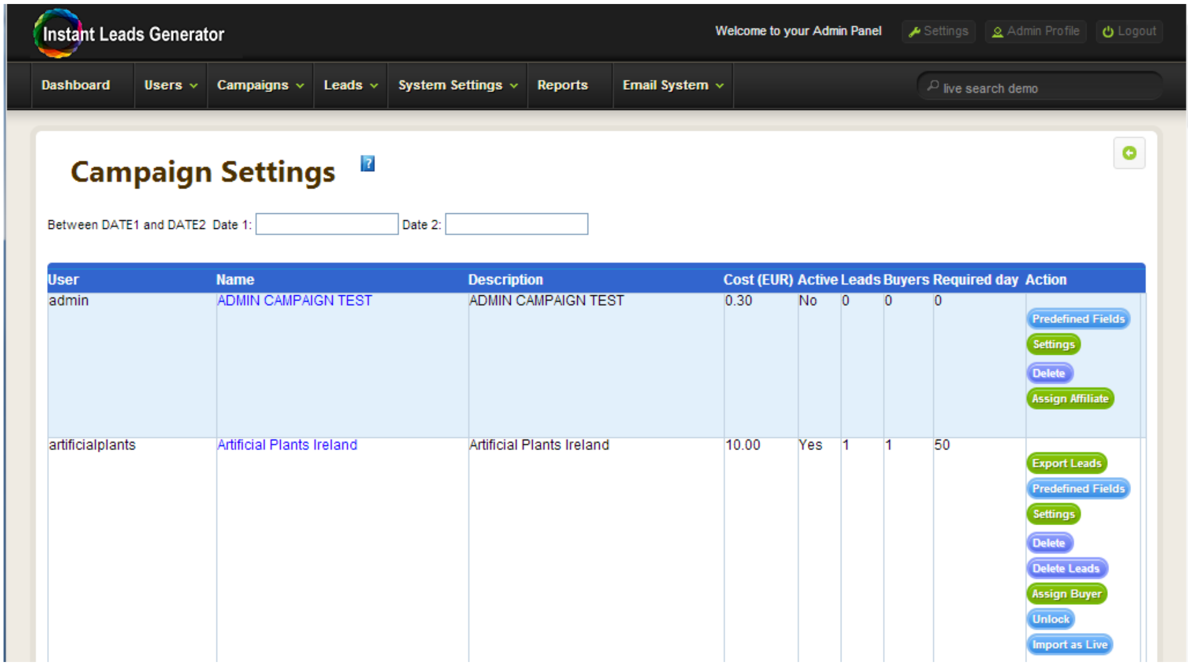
For example it lets you ban swear words and email addresses from certain unwanted domains or from specific IP addresses.

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.



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).

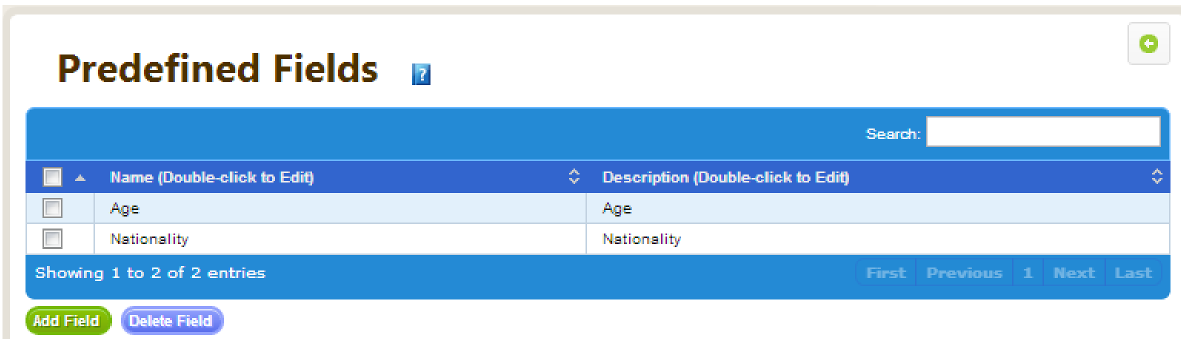
You associate a pricing schedule and the searchable category for any campaign in the admin panel, by going to Campaign Settings, and clicking the “Settings” button for the campaign and selecting the pricing schedule and category from the dropdowns.

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.

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

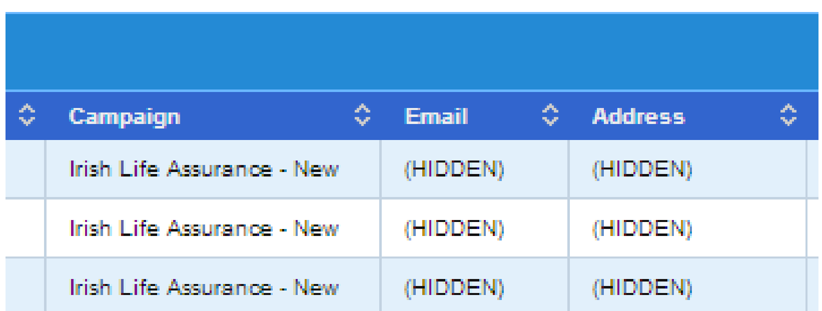
6.6 Predefined Fields

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.



However, you can also create custom questions on any campaign's setup page. As explained later in this document custom questions allow far greater flexibility 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 (search for leads) system until after a lead has been purchased (see across).



	Campaign	Email	Address
	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)
	Irish Life Assurance - New	(HIDDEN)	(HIDDEN)
	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.

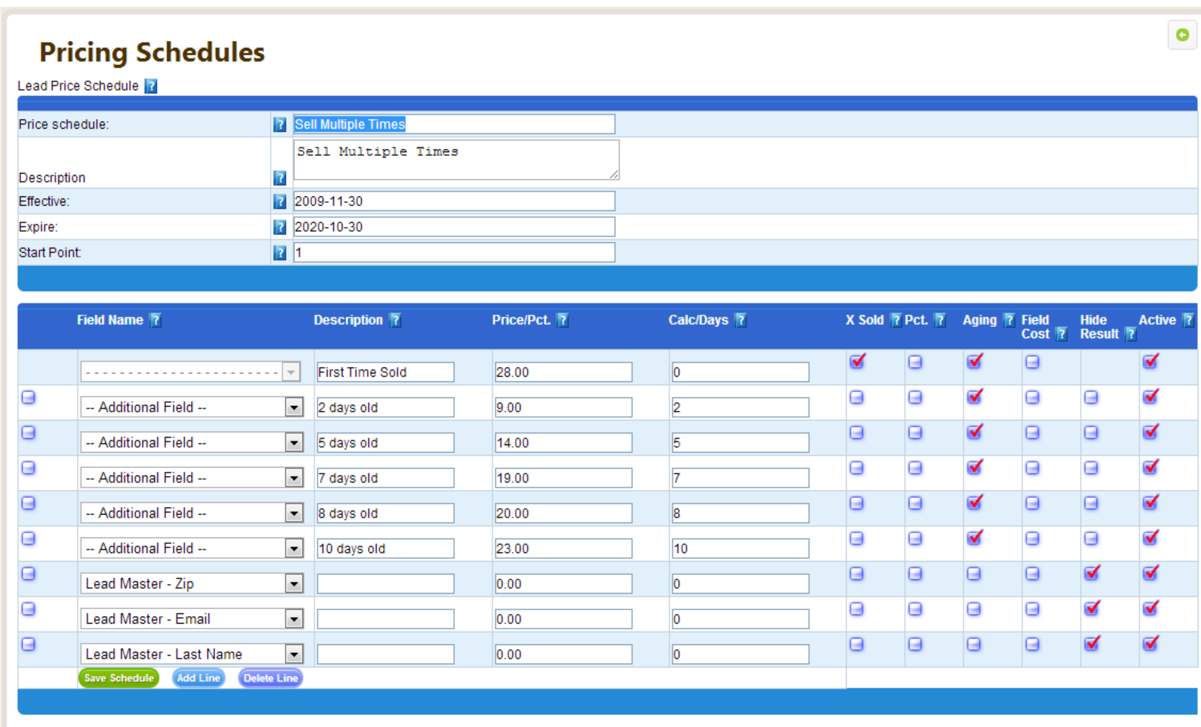
6.7 Pricing Schedules

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).

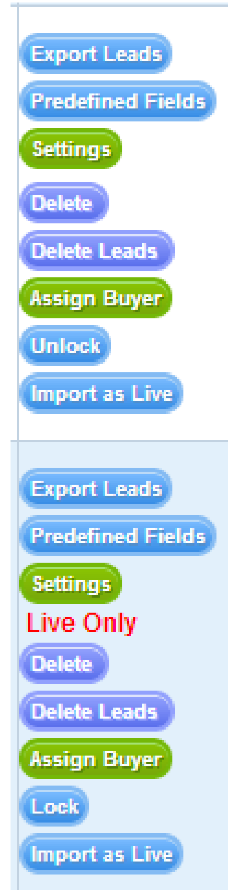
In a pricing schedule you can do such things as decreasing the price of each lead as it ages or depending on the number of times it has been sold. Data from certain fields can also be hidden on the results page until a lead is purchased.

Here is a screenshot of a typical pricing schedule:



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

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.

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).

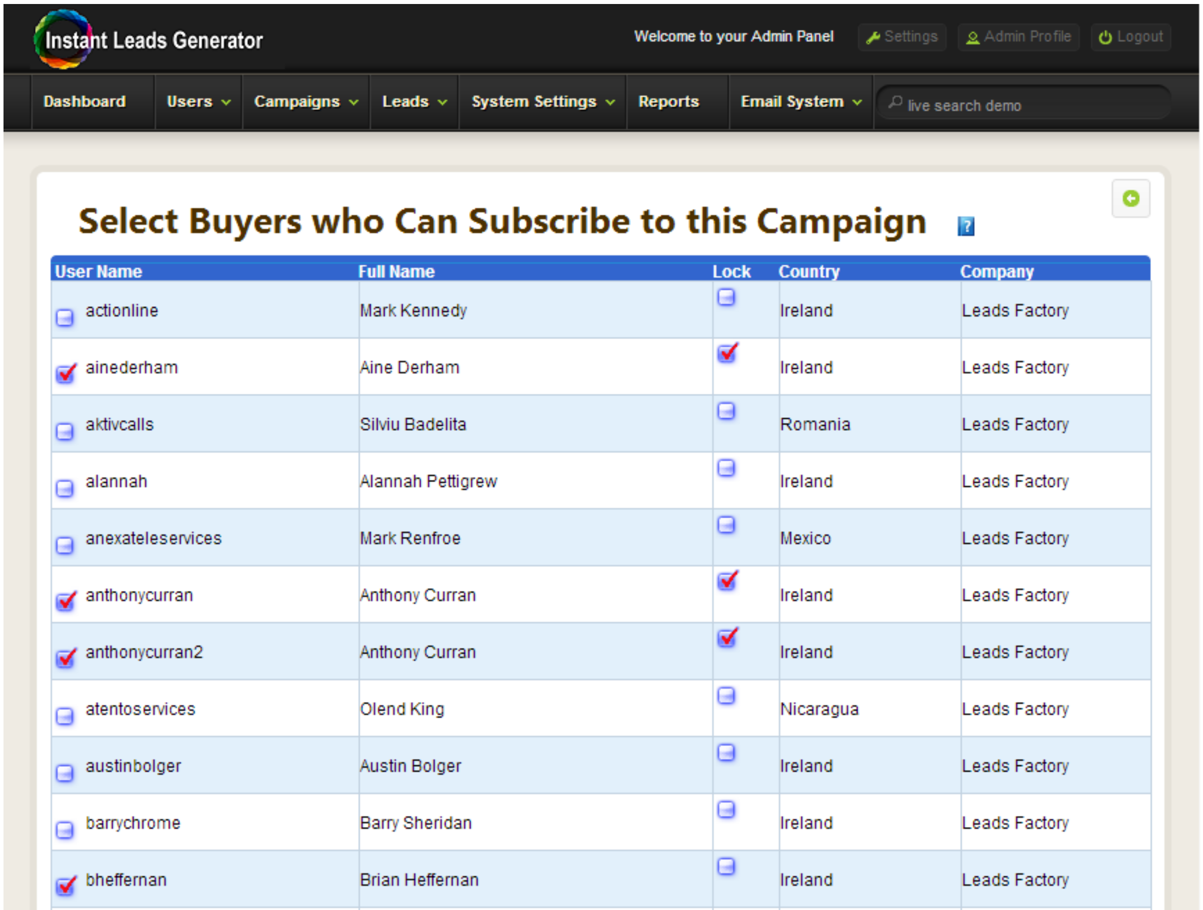
7.4 Delete & Delete Leads

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.

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.



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

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

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.

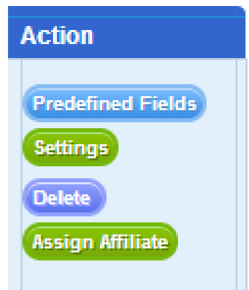
Great care must be taken to correctly map each field in the csv file to its equivalent fieldname on this page. The numbers that you select in the dropdown next to each fieldname should mirror the column number that contains that data in the csv file.

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 2nd 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 assign 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.

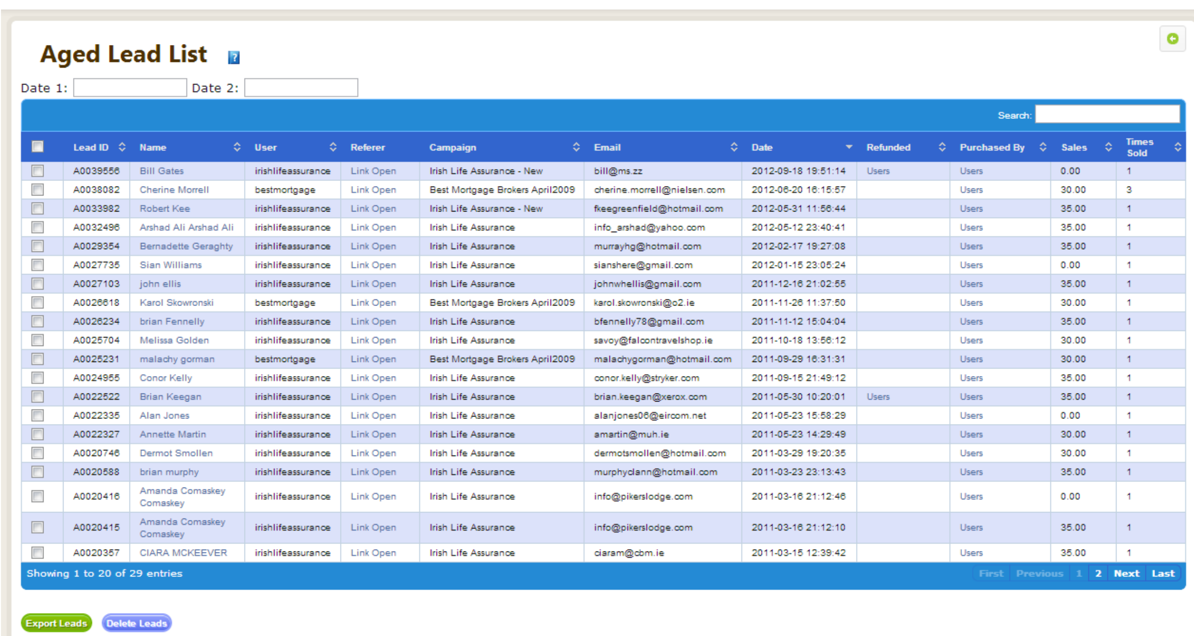
8 Leads Control Panel

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.



Aged Lead List

Date 1: Date 2:

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 11:56:44		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	alanjones06@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 1 to 20 of 29 entries

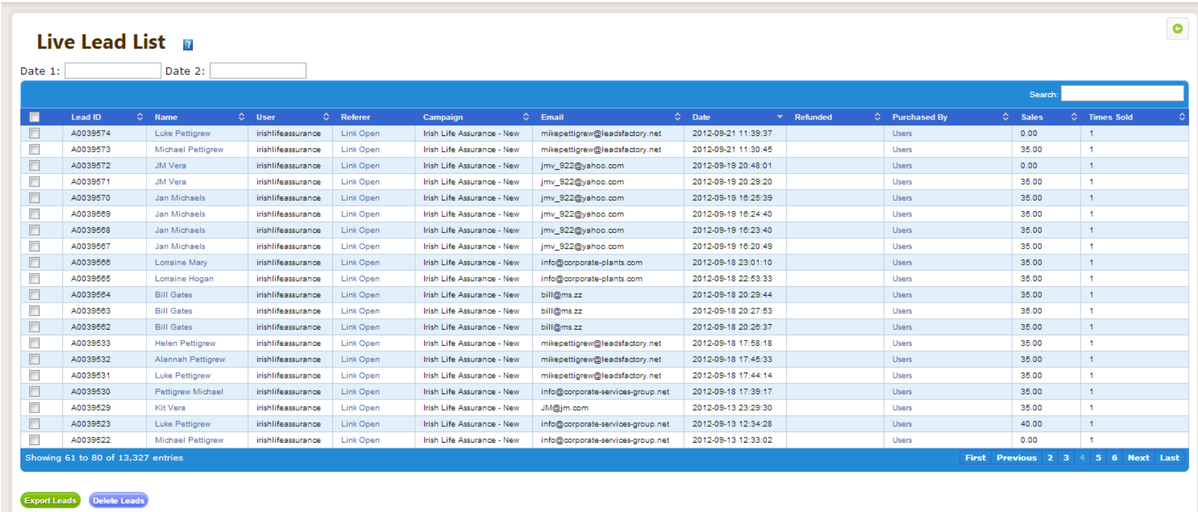
First Previous 1 2 Next Last

Export Leads Delete 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.

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.



Live Lead List

Date 1: Date 2:

Search:

Lead ID	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 16:24:40		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@yahoo.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

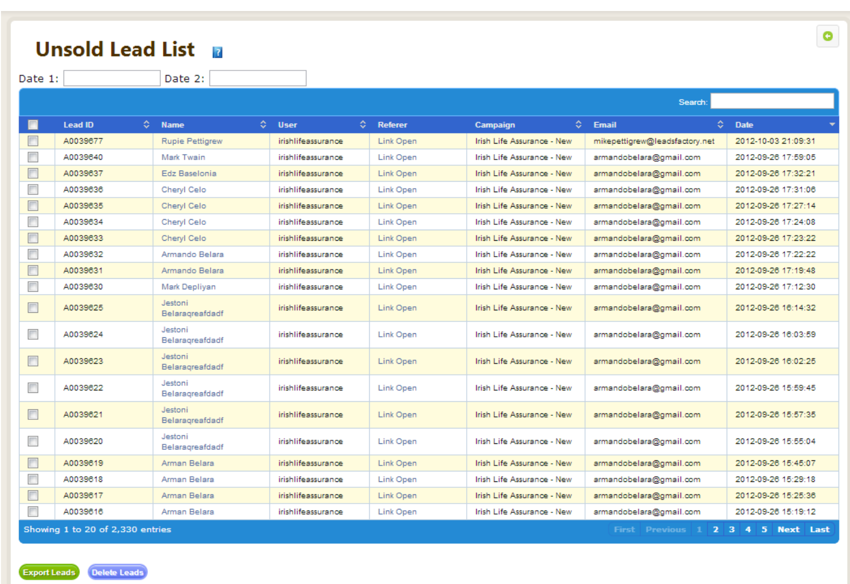
Showing 61 to 80 of 13,327 entries

First Previous 2 3 4 5 6 Next Last

Export Leads Delete Leads

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

8.3 Unsold Leads



Unsold Lead List

Date 1: Date 2:

Search:

Lead ID	Name	User	Referer	Campaign	Email	Date
A0039677	Rupie Pettigrew	irishlifeassurance	Link Open	Irish Life Assurance - New	mikepettigrew@leadsfactory.net	2012-10-03 21:09:31
A0039640	Mark Twain	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:59:05
A0039637	Edz Baselonia	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:32:21
A0039636	Cheryl Celo	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:31:06
A0039635	Cheryl Celo	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:27:14
A0039634	Cheryl Celo	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:24:08
A0039633	Cheryl Celo	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:23:22
A0039632	Armando Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:22:22
A0039631	Armando Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:19:48
A0039630	Mark Depliyan	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 17:12:30
A0039625	Jestoni Belaraqreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 16:14:32
A0039624	Jestoni Belaraqreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 16:03:59
A0039623	Jestoni Belaraqreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 16:02:25
A0039622	Jestoni Belaraqreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:59:45
A0039621	Jestoni Belaraqreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:57:35
A0039620	Jestoni Belaraqreafdadf	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:55:04
A0039619	Arman Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:45:07
A0039618	Arman Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:29:18
A0039617	Arman Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:25:36
A0039616	Arman Belara	irishlifeassurance	Link Open	Irish Life Assurance - New	armandobelara@gmail.com	2012-09-26 15:19:12

Showing 1 to 20 of 2,330 entries

First Previous 1 2 3 4 5 Next Last

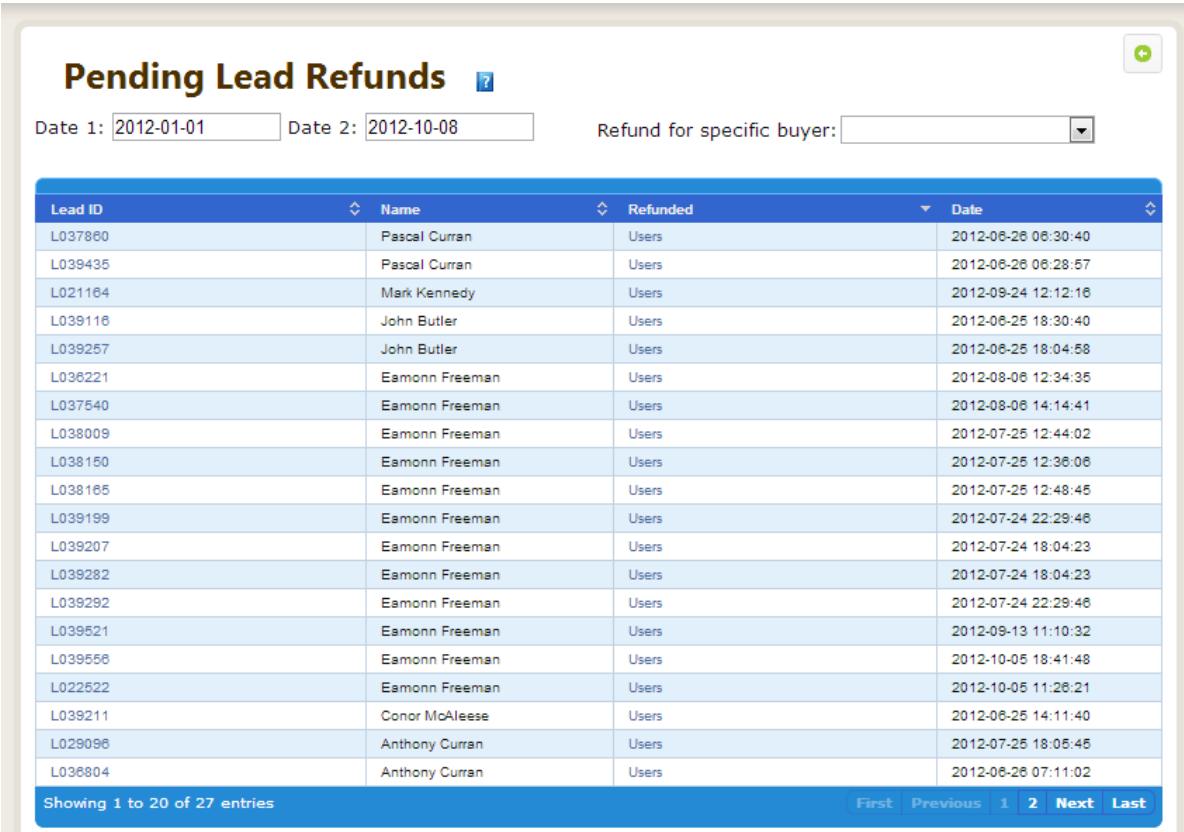
Export Leads Delete Leads

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.

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.



Pending Lead Refunds

Date 1: 2012-01-01 Date 2: 2012-10-08 Refund for specific buyer:

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 12:12:16
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 12:36:06
L038165	Eamonn Freeman	Users	2012-07-25 12:48:45
L039199	Eamonn Freeman	Users	2012-07-24 22:29:46
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 22:29:46
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 11:26:21
L039211	Conor McAleese	Users	2012-06-25 14:11:40
L029096	Anthony Curran	Users	2012-07-25 18:05:45
L036804	Anthony Curran	Users	2012-06-26 07:11:02

Showing 1 to 20 of 27 entries First Previous 1 2 Next Last

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.

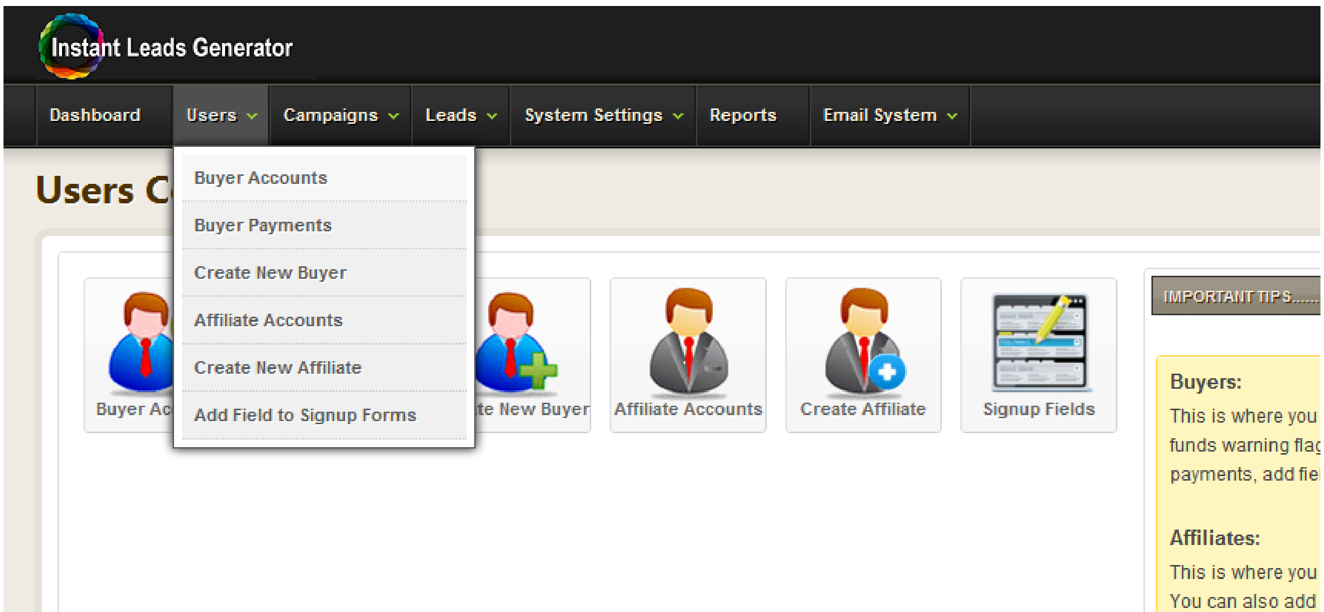
8.5 Import Leads

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.

9 Users Control Panel

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

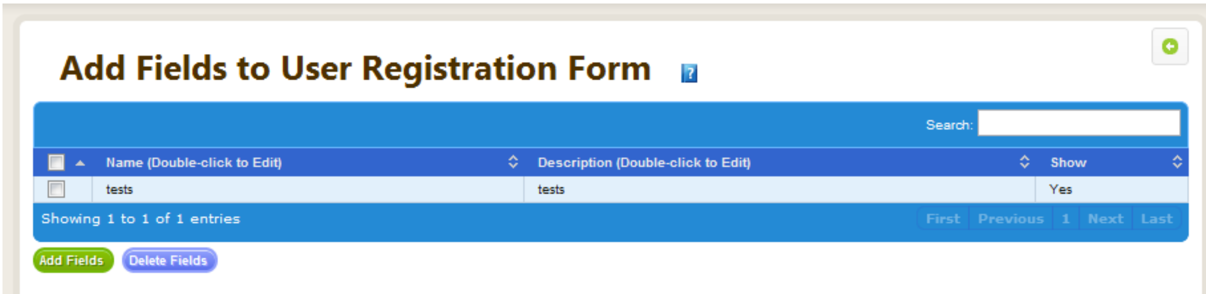
Buyer accounts (lead recipients) and admin accounts can be created at the login page as well as by selecting “Create New Buyer” or “Create New Affiliate” from the Users dropdown in the admin panel menu.



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.

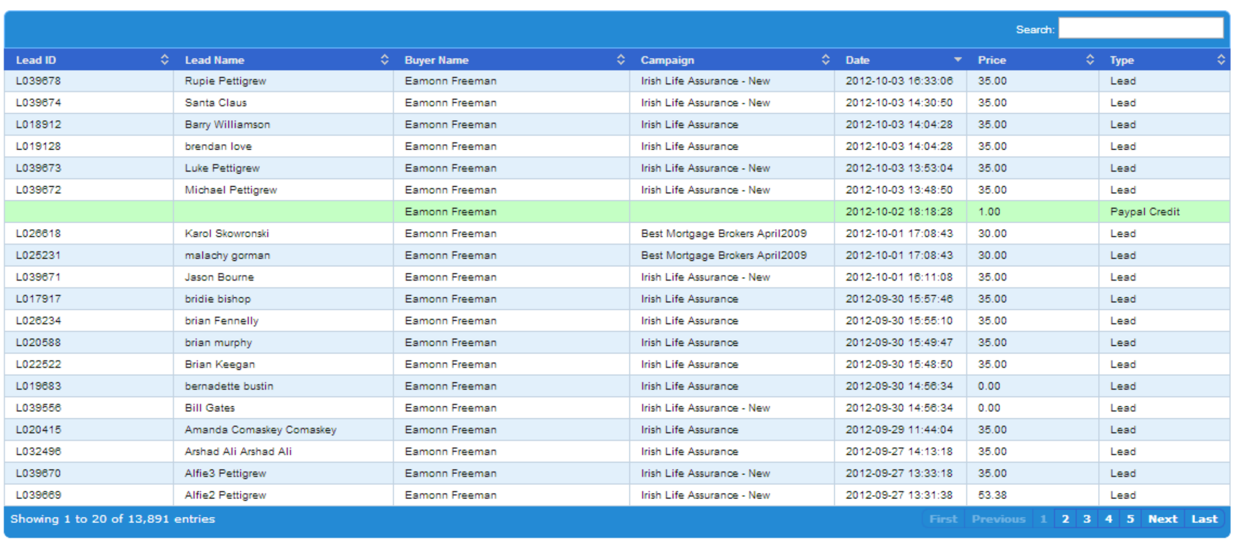
9.1 Signup Fields

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.



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

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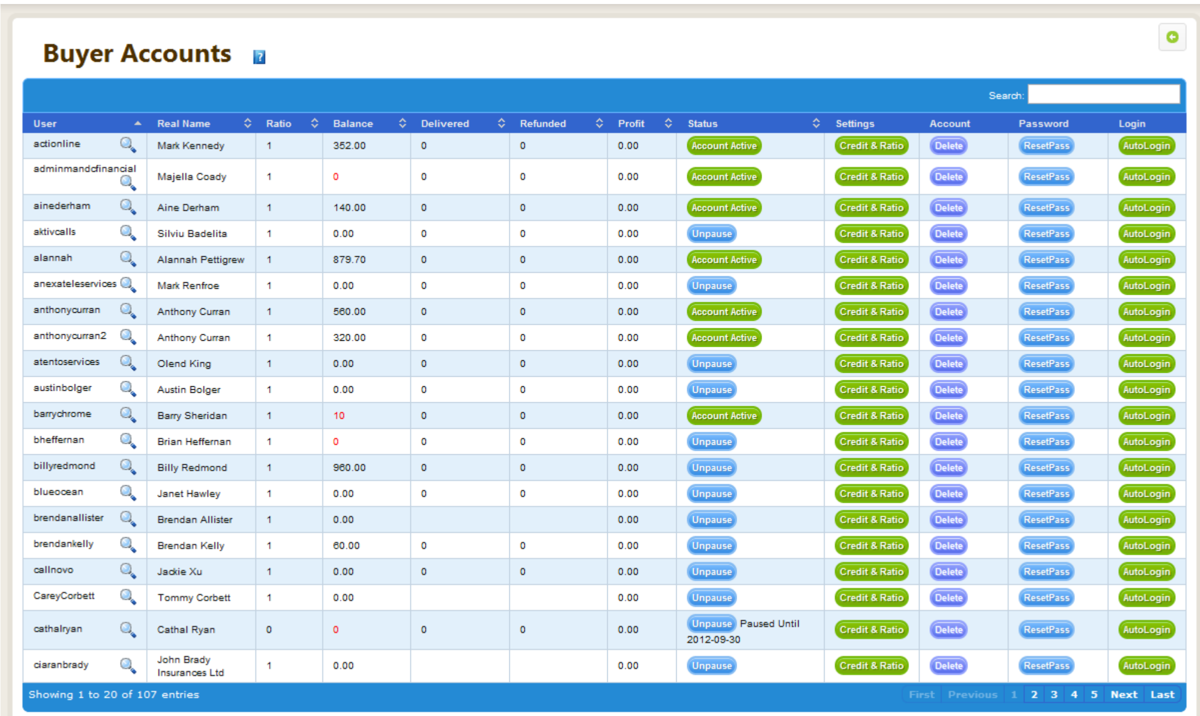
You can also see their account balance and every lead they have received as well as which leads have been refund.

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 Accounts

Search:

User	Real Name	Ratio	Balance	Delivered	Refunded	Profit	Status	Settings	Account	Password	Login
actionline	Mark Kennedy	1	352.00	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
adminmandcfinancial	Majella Coady	1	0	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
ainederham	Aine Derham	1	140.00	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
aktivcalls	Silviu Badelita	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
alannah	Alannah Pettigrew	1	879.70	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
anexateleservices	Mark Renfroe	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
anthonycurran	Anthony Curran	1	560.00	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
anthonycurran2	Anthony Curran	1	320.00	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
atentoservices	Olend King	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
austinbolger	Austin Bolger	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
barrychrome	Barry Sheridan	1	10	0	0	0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
bheffernan	Brian Heffernan	1	0	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
billyredmond	Billy Redmond	1	960.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
blueocean	Janet Hawley	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
brendanallister	Brendan Allister	1	0.00			0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
brendankelly	Brendan Kelly	1	60.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
callnovo	Jackie Xu	1	0.00	0	0	0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
CareyCorbett	Tommy Corbett	1	0.00			0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin
cathalryan	Cathal Ryan	0	0	0	0	0.00	Unpause Paused Until 2012-09-30	Credit & Ratio	Delete	ResetPass	AutoLogin
ciaranbrady	John Brady Insurances Ltd	1	0.00			0.00	Unpause	Credit & Ratio	Delete	ResetPass	AutoLogin

Showing 1 to 20 of 107 entries

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9.4 Buyer Account Buttons

Search:

Profit	Status	Settings	Account	Password	Login
0.00	Account Active	Credit & Ratio	Delete	ResetPass	AutoLogin
0.00	Account Active	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.

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.

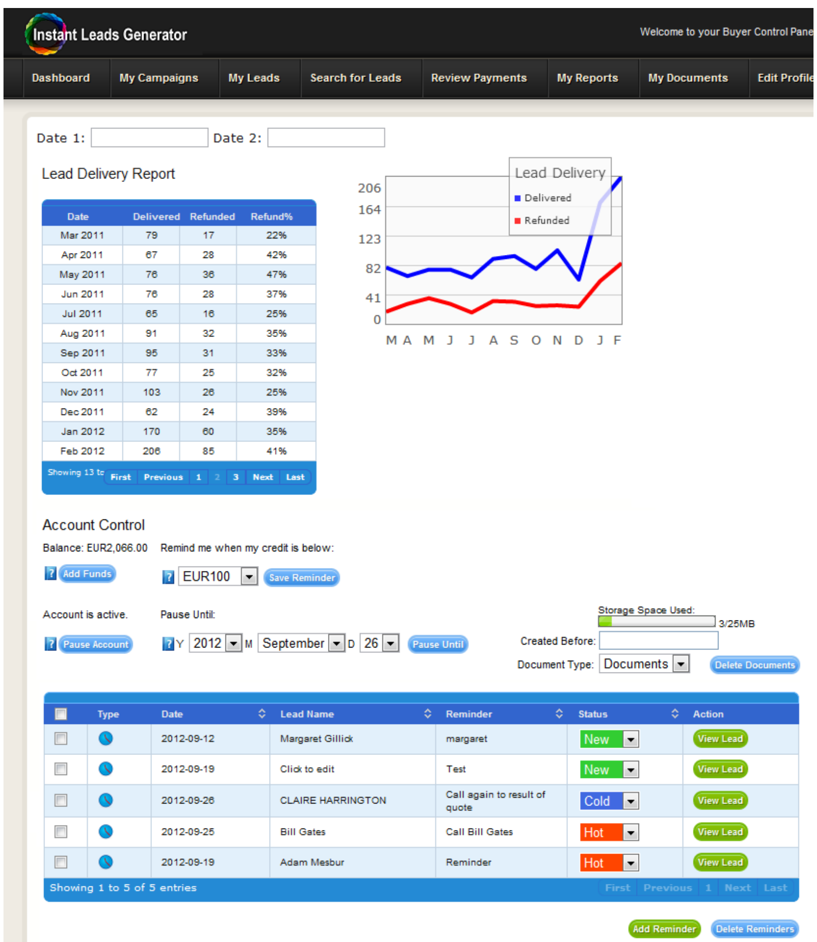
AutoLogin

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



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

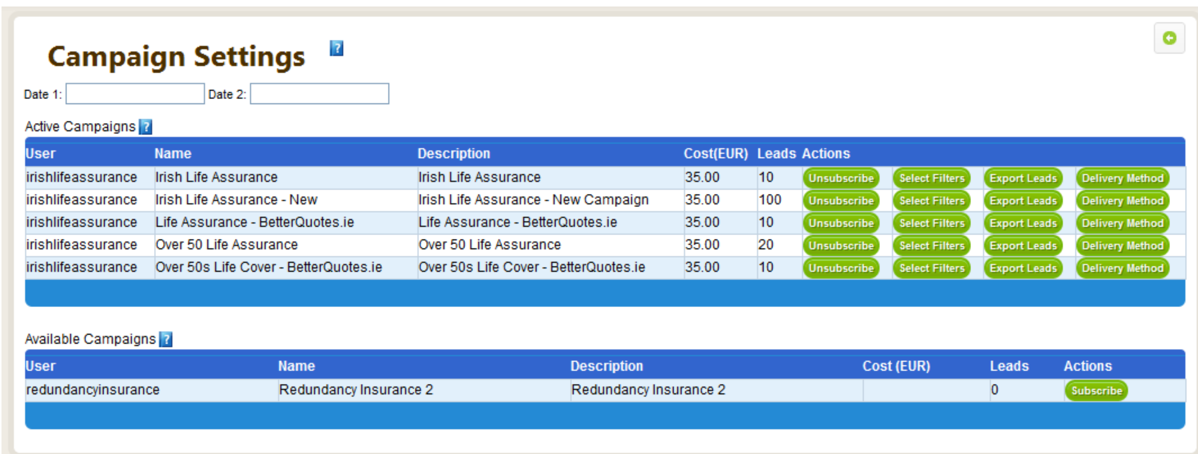
It displays reports as well as any reminders that the buyer has created.

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.

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.



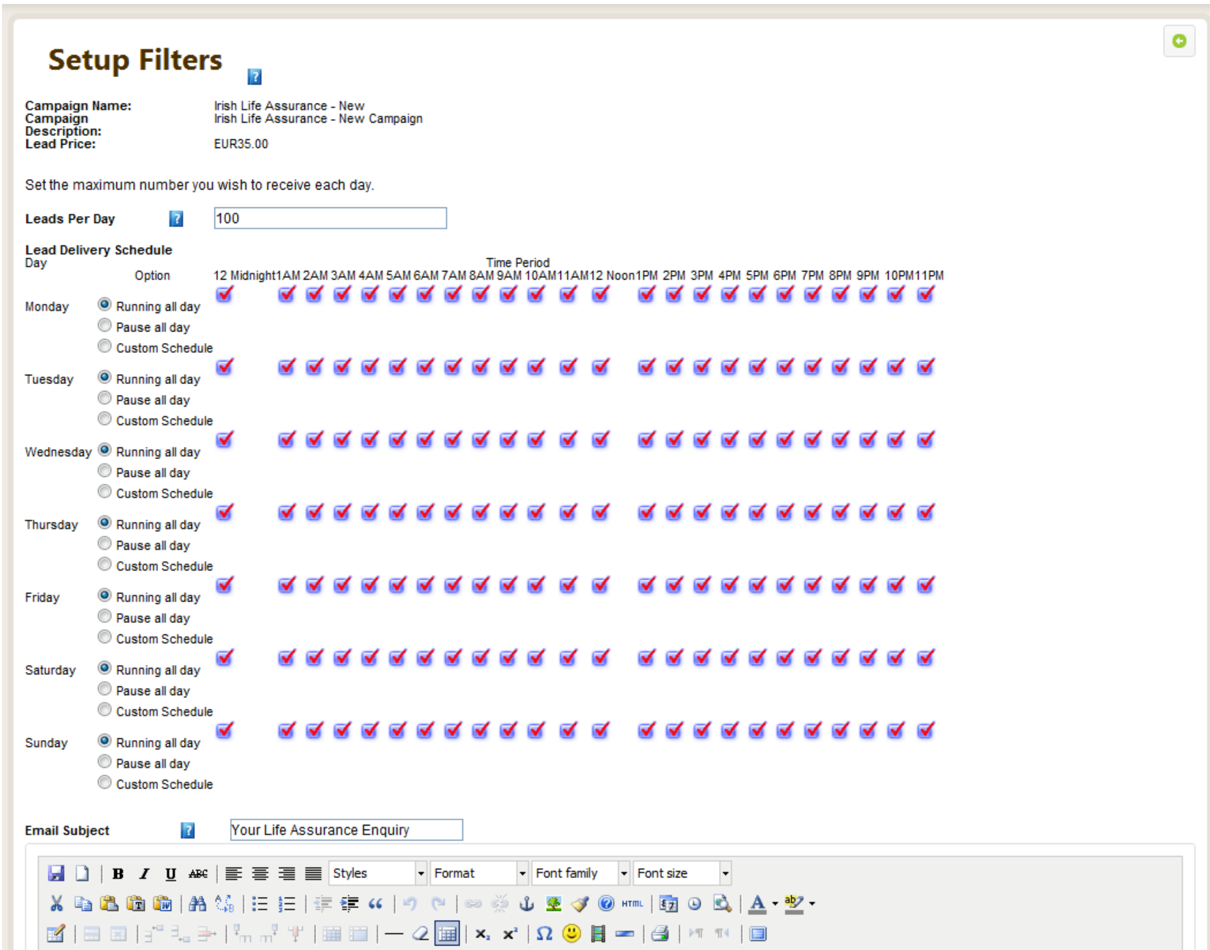
By clicking the Select Filters button they can also set the maximum number of leads they would like to receive each day, set their lead filters, their lead delivery schedule and the autoresponse email message that goes out to each lead that is delivered live into their account.

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

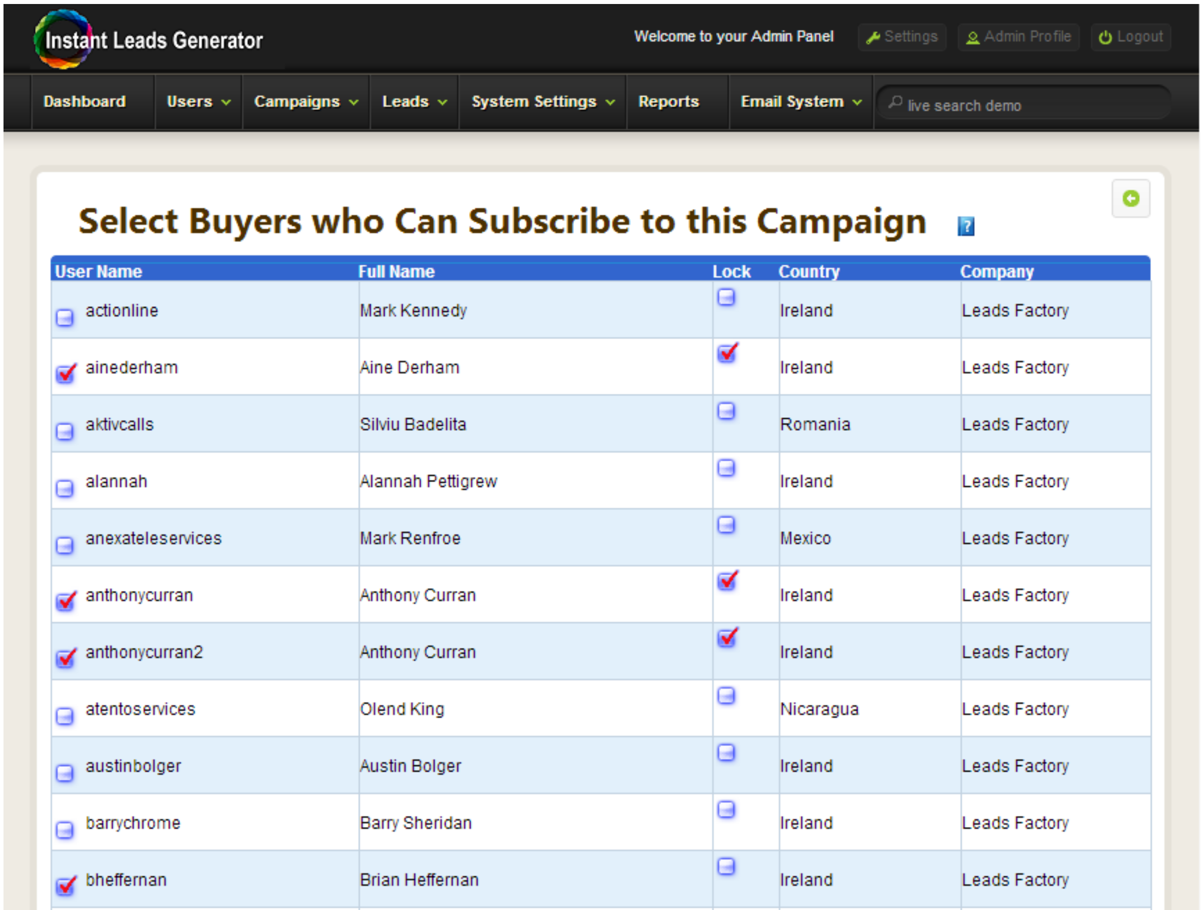
The filters page allows you to set the filters, delivery schedule, leads per day and autoresponse email message for each buyer.



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.

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



User Name	Full Name	Lock	Country	Company
actionline	Mark Kennedy		Ireland	Leads Factory
ainederham	Aine Derham	✓	Ireland	Leads Factory
aktivcalls	Silviu Badelita		Romania	Leads Factory
alannah	Alannah Pettigrew		Ireland	Leads Factory
anexateleservices	Mark Renfroe		Mexico	Leads Factory
anthonycurran	Anthony Curran	✓	Ireland	Leads Factory
anthonycurran2	Anthony Curran	✓	Ireland	Leads Factory
atentoservices	Olend King		Nicaragua	Leads Factory
austinbolger	Austin Bolger		Ireland	Leads Factory
barrychrome	Barry Sheridan		Ireland	Leads Factory
bheffernan	Brian Heffernan		Ireland	Leads Factory

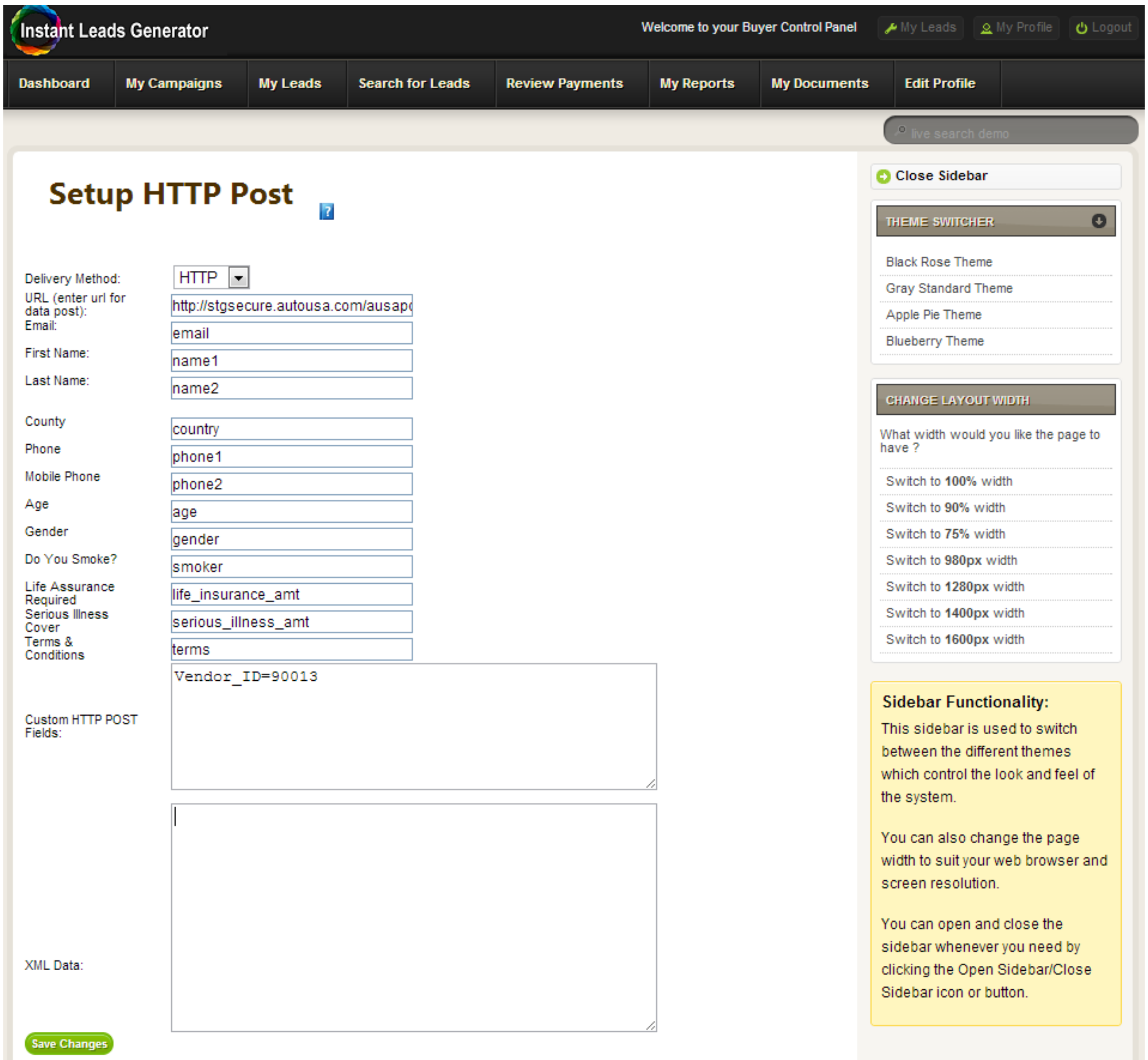
So long as they remain locked they will not be able to open their filters page, until you unlock them again.

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

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:



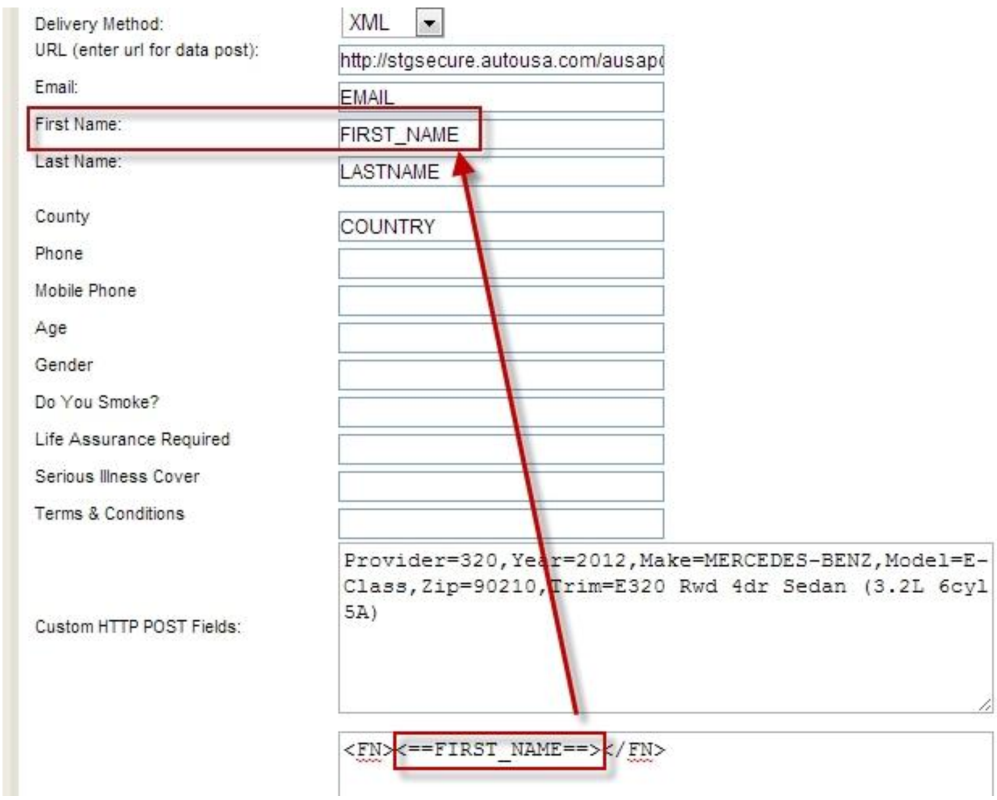
In the buyer back office go to My Campaigns, and click the "Delivery Method" button of the campaign for which you wish to setup the posting. On the page that opens (see above) you need to select the Delivery Method from the dropdown and then enter the full URL to which the leads should be posted. In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



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 <u>static data</u>)

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.

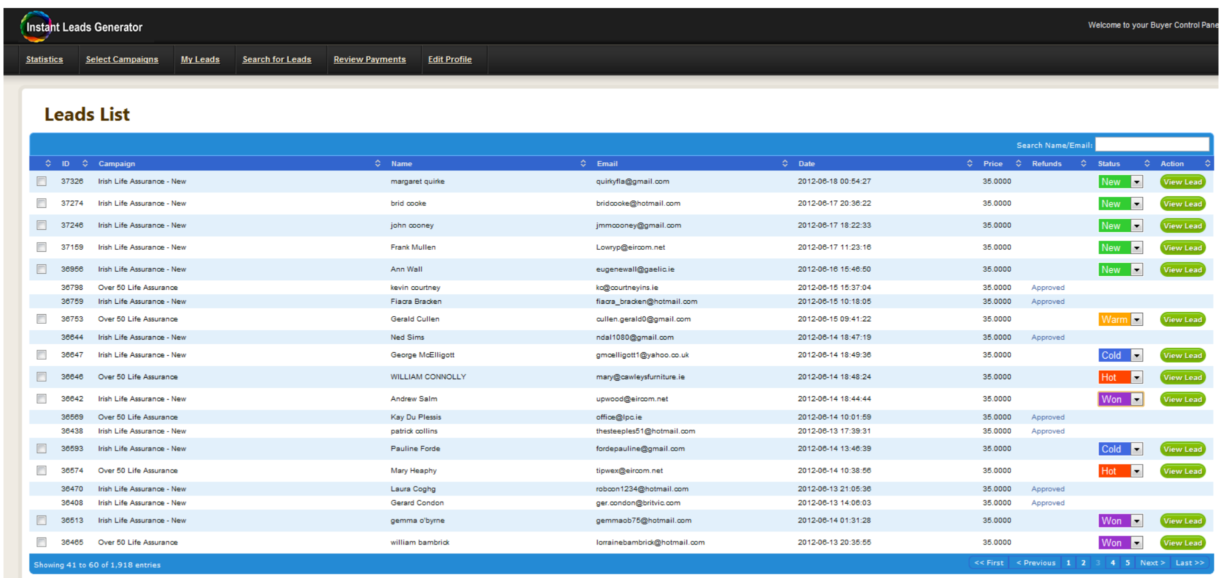
Here is a sample xml posting format:

```
<?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>
```

<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><name part="full">National Consumer Solutions</name>
<service>NCSN</service></provider></prospect></adf>

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.

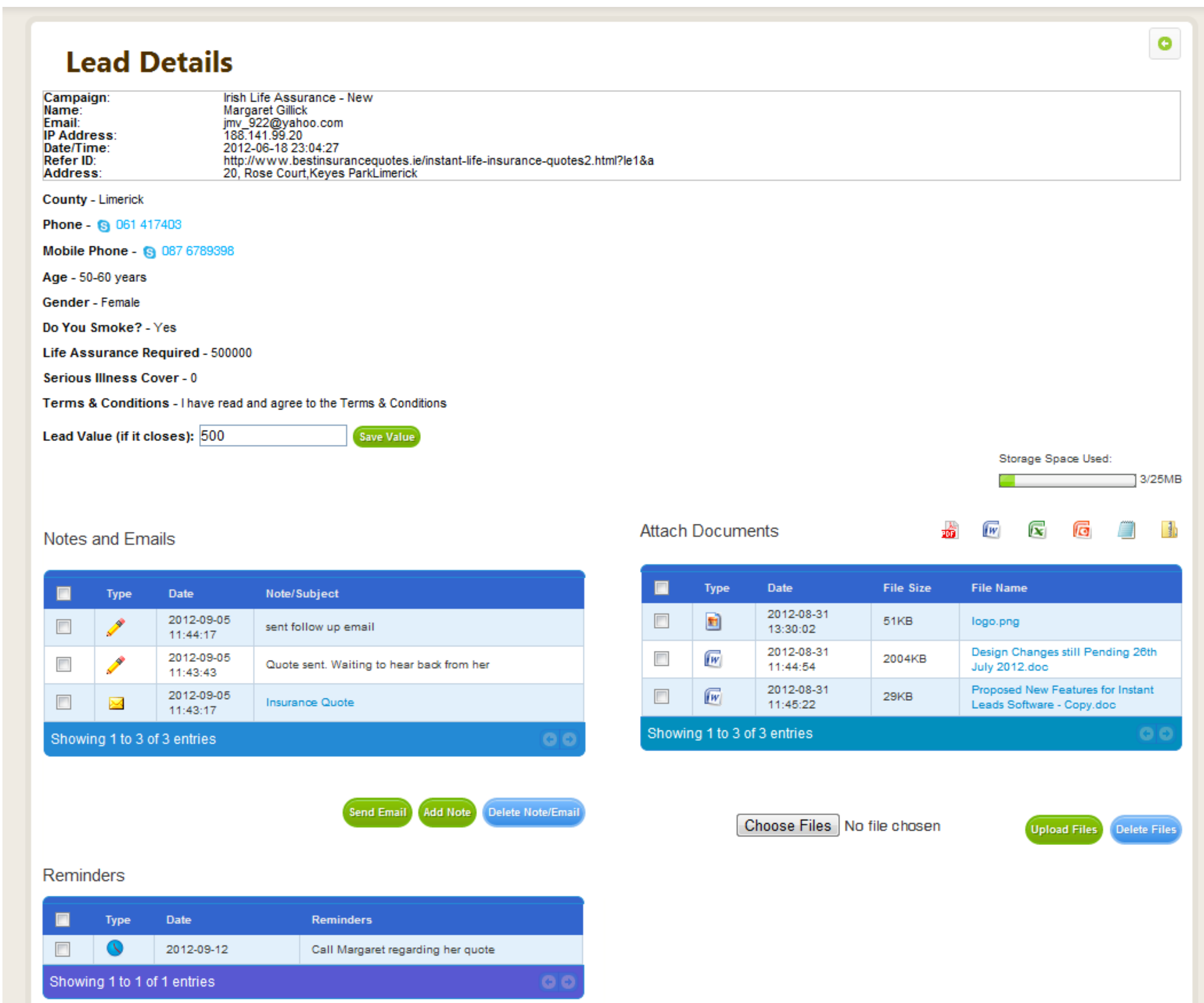


They can also select certain leads, apply for a refund and view the status of their lead refund requests. Buyers can also quickly search for and find any lead in their account and open the Leads Details page of each lead by clicking its View button.

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.

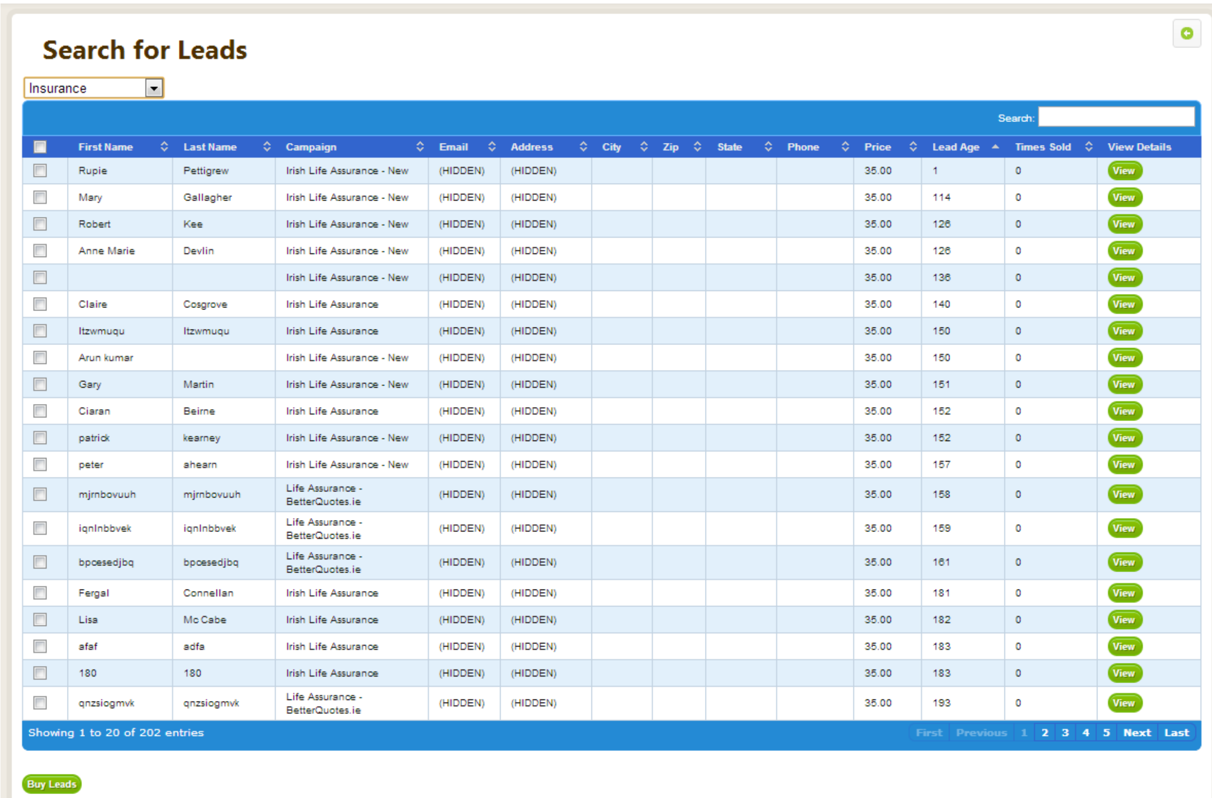


10.7 Search for Leads

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.

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


Search for Leads

Insurance

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	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	136	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
iqnlnbbvek	iqnlnbbvek	Life Assurance - BetterQuotes.ie	(HIDDEN)	(HIDDEN)					35.00	159	0	View
bpcesedjbq	bpcesedjbq	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

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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.

Payments

Date 1: Date 2:

Date	Amount	Type
2012-10-02 18:18:28	1.00	Paypal Credit
2012-09-26 08:35:09	2000.00	Admin Credit
2012-09-21 06:48:34	1000.00	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

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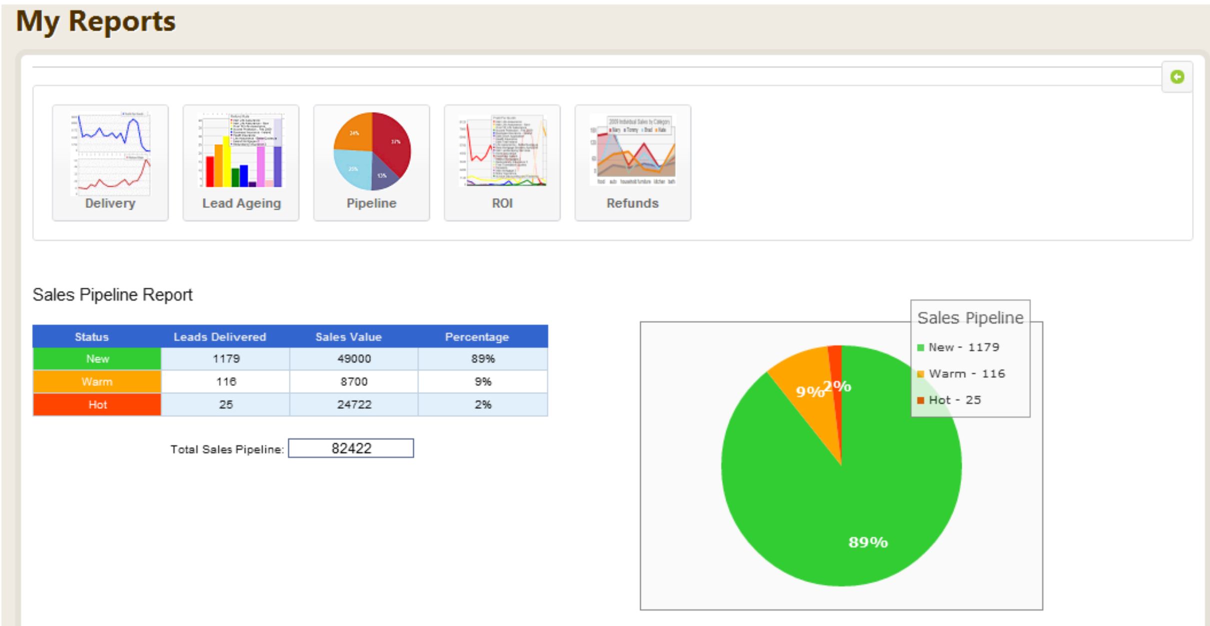
Export Leads

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).



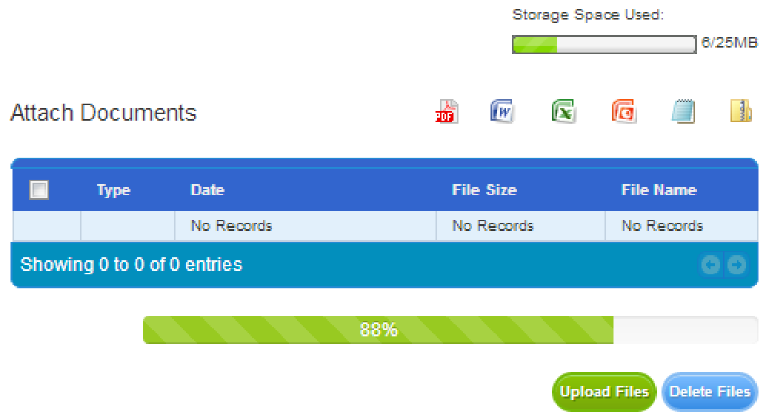
These reports include a Lead Delivery Report, a Lead Ageing Report, a Sales Pipeline Report, a Return on Investment Report and a Refunds Report.

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

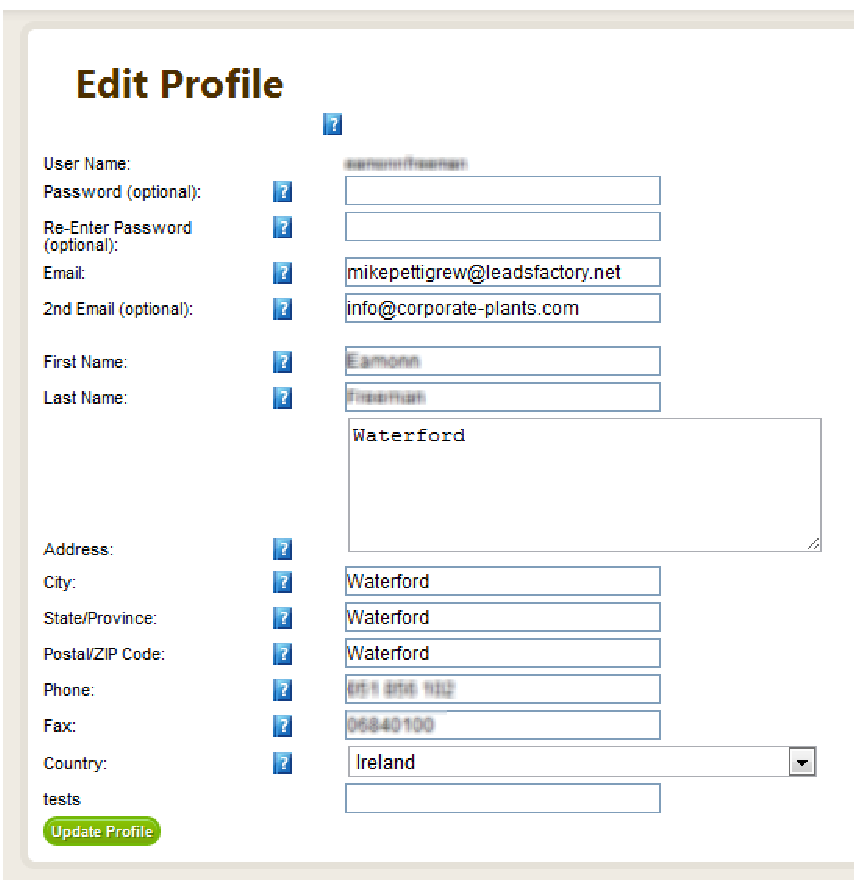
Admin only allocates a certain amount of document storage space to each buyer account (set in System Setup). If a buyer were to upload the same documents again and again and attach these to different leads it could be a waste of their document storage space. Therefore, buyers can save storage space by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



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



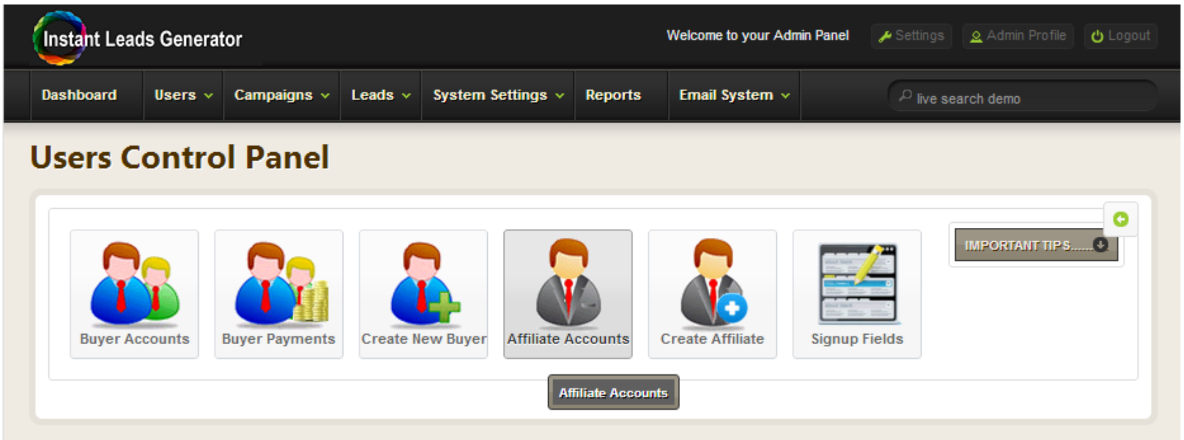
This is where each buyer can change their login password and contact details, as well as the email addresses to which lead alert emails should be sent.

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

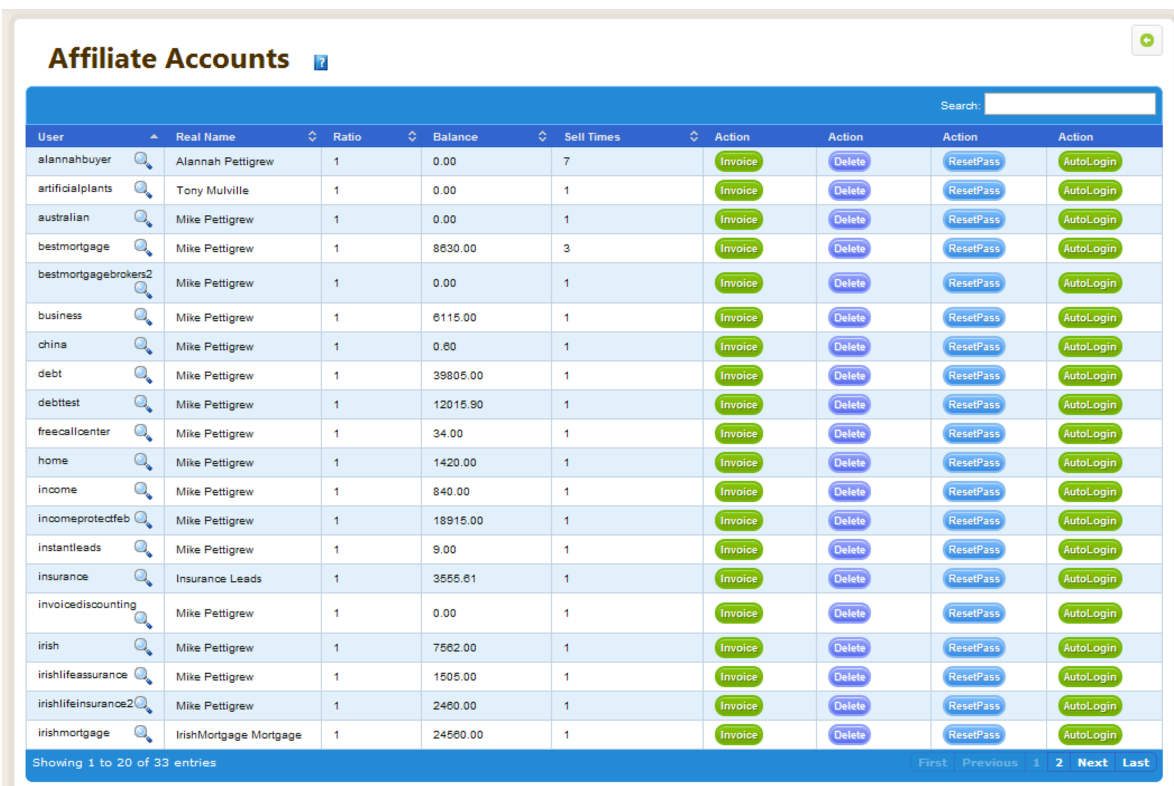
The first email address (which is mandatory) is the one that will used when sending automated emails to the leads that are delivered live into their account.

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.



User	Real Name	Ratio	Balance	Sell Times	Action	Action	Action	Action
alannahbuyer	Alannah Pettigrew	1	0.00	7	Invoice	Delete	ResetPass	AutoLogin
artificialplants	Tony Mulville	1	0.00	1	Invoice	Delete	ResetPass	AutoLogin
australian	Mike Pettigrew	1	0.00	1	Invoice	Delete	ResetPass	AutoLogin
bestmortgage	Mike Pettigrew	1	8630.00	3	Invoice	Delete	ResetPass	AutoLogin
bestmortgagebrokers2	Mike Pettigrew	1	0.00	1	Invoice	Delete	ResetPass	AutoLogin
business	Mike Pettigrew	1	6115.00	1	Invoice	Delete	ResetPass	AutoLogin
china	Mike Pettigrew	1	0.60	1	Invoice	Delete	ResetPass	AutoLogin
debt	Mike Pettigrew	1	39805.00	1	Invoice	Delete	ResetPass	AutoLogin
debttest	Mike Pettigrew	1	12015.90	1	Invoice	Delete	ResetPass	AutoLogin
freecallcenter	Mike Pettigrew	1	34.00	1	Invoice	Delete	ResetPass	AutoLogin
home	Mike Pettigrew	1	1420.00	1	Invoice	Delete	ResetPass	AutoLogin
income	Mike Pettigrew	1	840.00	1	Invoice	Delete	ResetPass	AutoLogin
incomeprotectfeb	Mike Pettigrew	1	18915.00	1	Invoice	Delete	ResetPass	AutoLogin
instantleads	Mike Pettigrew	1	9.00	1	Invoice	Delete	ResetPass	AutoLogin
insurance	Insurance Leads	1	3555.61	1	Invoice	Delete	ResetPass	AutoLogin
invoicediscounting	Mike Pettigrew	1	0.00	1	Invoice	Delete	ResetPass	AutoLogin
irish	Mike Pettigrew	1	7562.00	1	Invoice	Delete	ResetPass	AutoLogin
irishlifeassurance	Mike Pettigrew	1	1505.00	1	Invoice	Delete	ResetPass	AutoLogin
irishlifeinsurance2	Mike Pettigrew	1	2460.00	1	Invoice	Delete	ResetPass	AutoLogin
irishmortgage	IrishMortgage Mortgage	1	24560.00	1	Invoice	Delete	ResetPass	AutoLogin

Showing 1 to 20 of 33 entries First Previous 1 2 Next Last

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".

Search:

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

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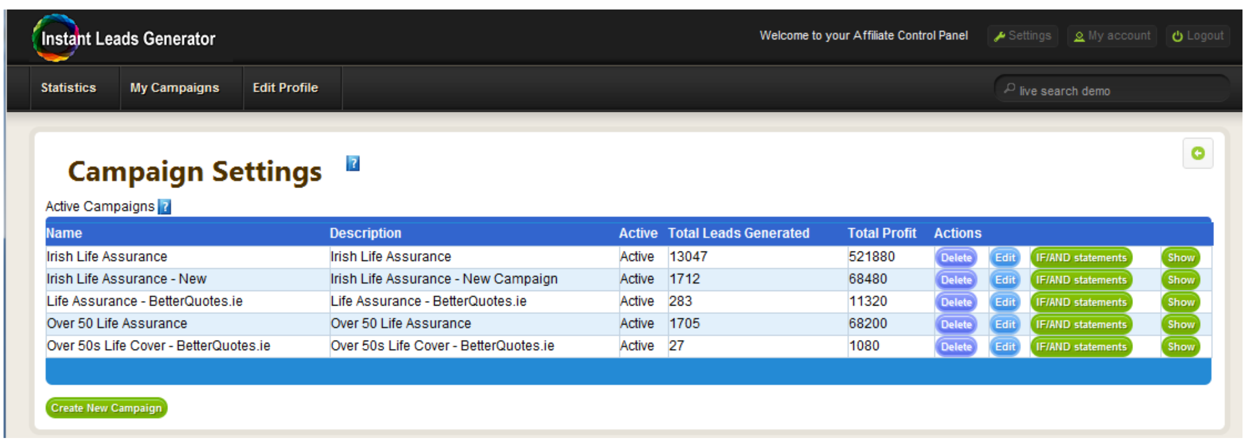
Likewise each lead that the affiliate has generated and that has been sold (and not refunded) shows the commission owed to the affiliate for that lead sale.

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.



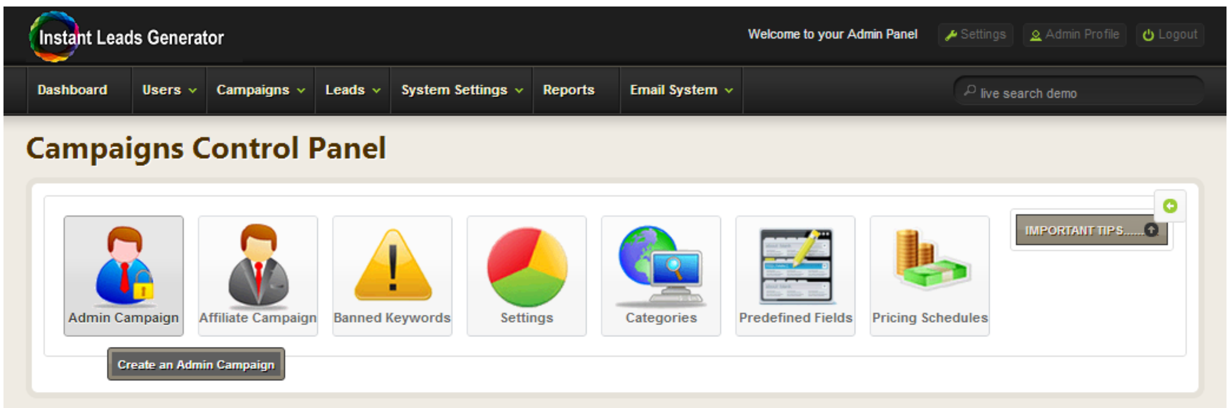
Name	Description	Active	Total Leads Generated	Total Profit	Actions			
Irish Life Assurance	Irish Life Assurance	Active	13047	521880	Delete	Edit	IF/AND statements	Show
Irish Life Assurance - New	Irish Life Assurance - New Campaign	Active	1712	68480	Delete	Edit	IF/AND statements	Show
Life Assurance - BetterQuotes.ie	Life Assurance - BetterQuotes.ie	Active	283	11320	Delete	Edit	IF/AND statements	Show
Over 50 Life Assurance	Over 50 Life Assurance	Active	1705	68200	Delete	Edit	IF/AND statements	Show
Over 50s Life Cover - BetterQuotes.ie	Over 50s Life Cover - BetterQuotes.ie	Active	27	1080	Delete	Edit	IF/AND statements	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 you will always need at least one affiliate account for your own in-house use. 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.



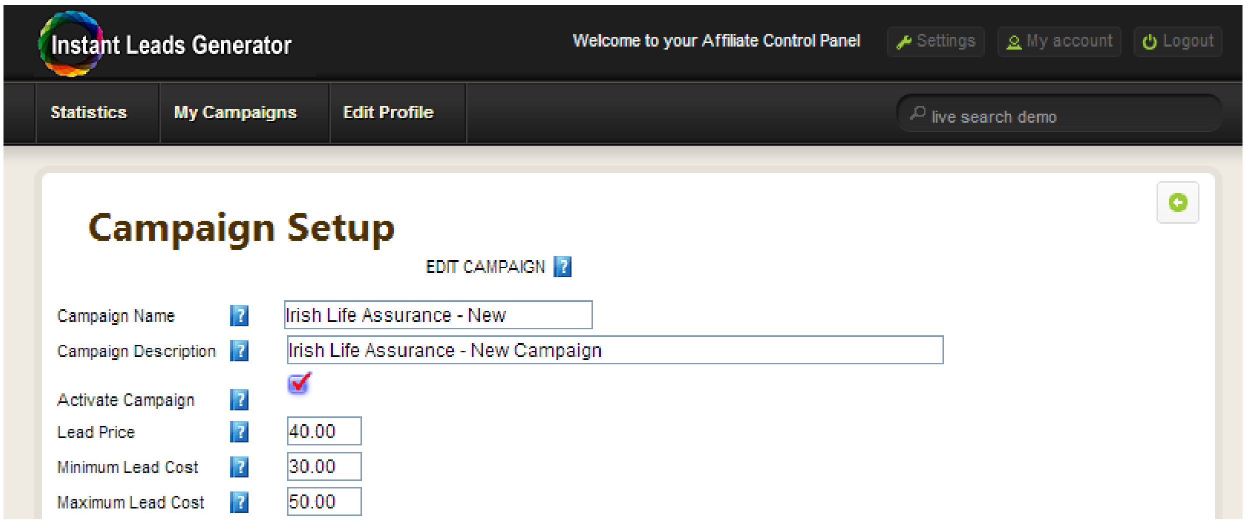
The campaign setup procedure is identical to the method used to create an affiliate campaign which is described in detail below in the section Campaign Setup.

Once you have created an Admin Campaign you must then assign* it 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.

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:



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.

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.

12.4 Minimum Lead Cost

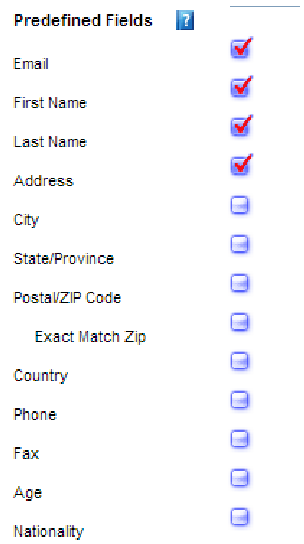
This is the Minimum Lead Cost that the software should sell leads from this campaign for when sold live. The software can alter prices many ways depending on other factors you set on this page and in other areas of the software, yet you can rest assured that the price of leads sold from this campaign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

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.

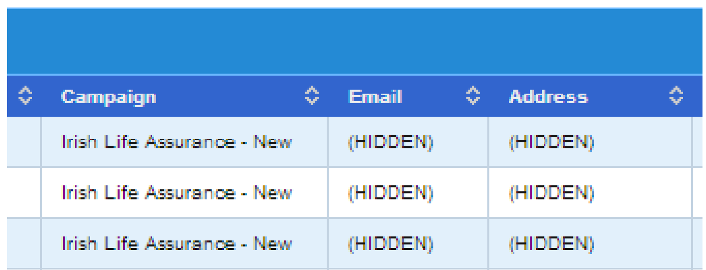
12.6 Predefined Fields

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 can also have their data hidden in the Cherry Picker (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.



Campaign	Email	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.

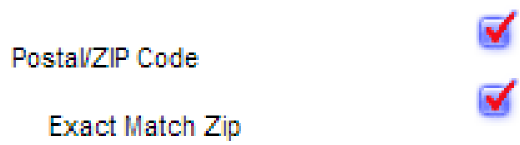
There is one exception and this is *the Exact Match Zip* field.

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.



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.

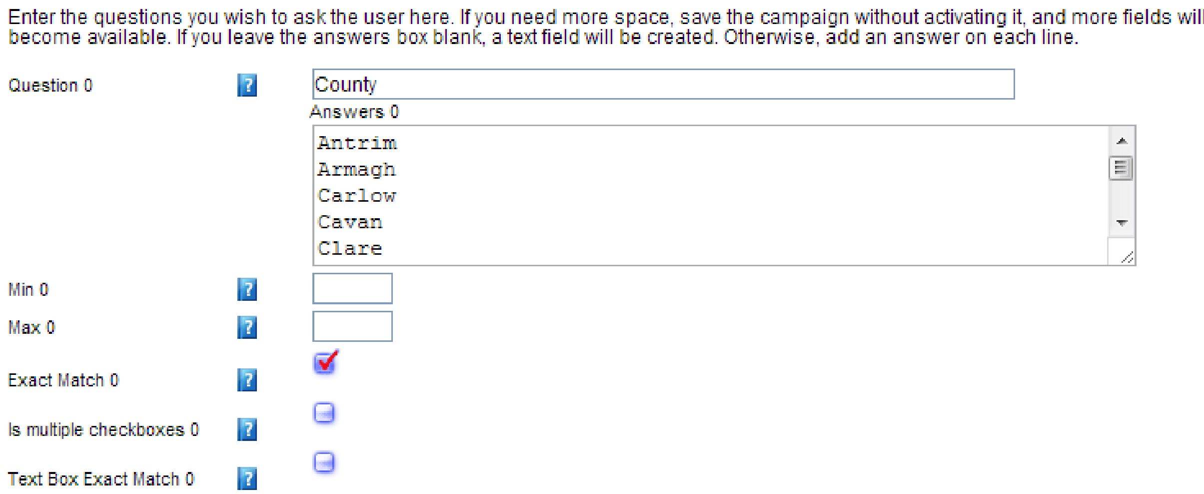
The software is not case sensitive for zip codes and will ignore spaces. This means that zip code TUD 345 is the same with tud 345 and TUD345.

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.



12.9 Question Fields

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

12.10 Answer Fields

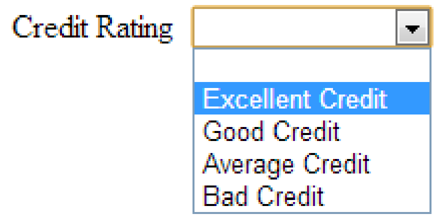
In this larger field there are 3 ways to create and price an answer:

<u>Creating a Text Box:</u>

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

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.

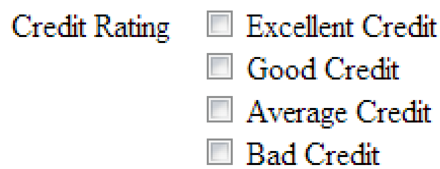


For example, you might have 4 answers as follows:

- Excellent Credit
- Good Credit
- Average Credit
- Bad Credit

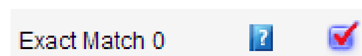
Creating a Checkbox:

To create a list of checkboxes follow the instructions above but also remember to check the "Is Multiple Checkboxes" field.



Exact Match

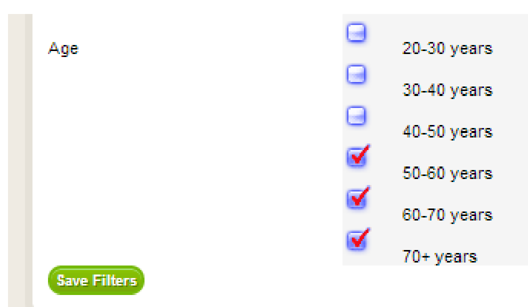
The Exact Match function allows you to create powerful buyer filters.



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.

Here is what this looks like on a buyer's Select Filters page (where the custom question is "Age"):



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

Question: What is your current credit rating?

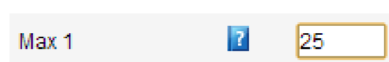
Answers:

- 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.

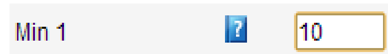
12.11 Max – Maximum Selection Length



The Maximum Selection Length function allows you to limit the amount of answers that a lead can select in a list of checkboxes, or the number of characters 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.

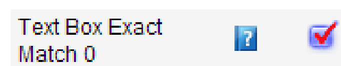
12.12 Min – Minimum Selection Length



The Minimum Selection Length function allows you to ensure 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.

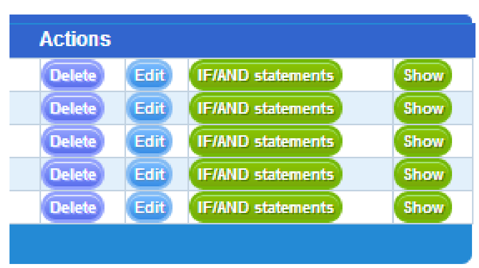
If the user does not select enough answers in a checkbox list or enters too few in a text box and then clicks submit, a pop up box will explain how to correct the error so they can submit the form correctly.

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 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.

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.

12.15 IF/AND Statements

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

WARNING:

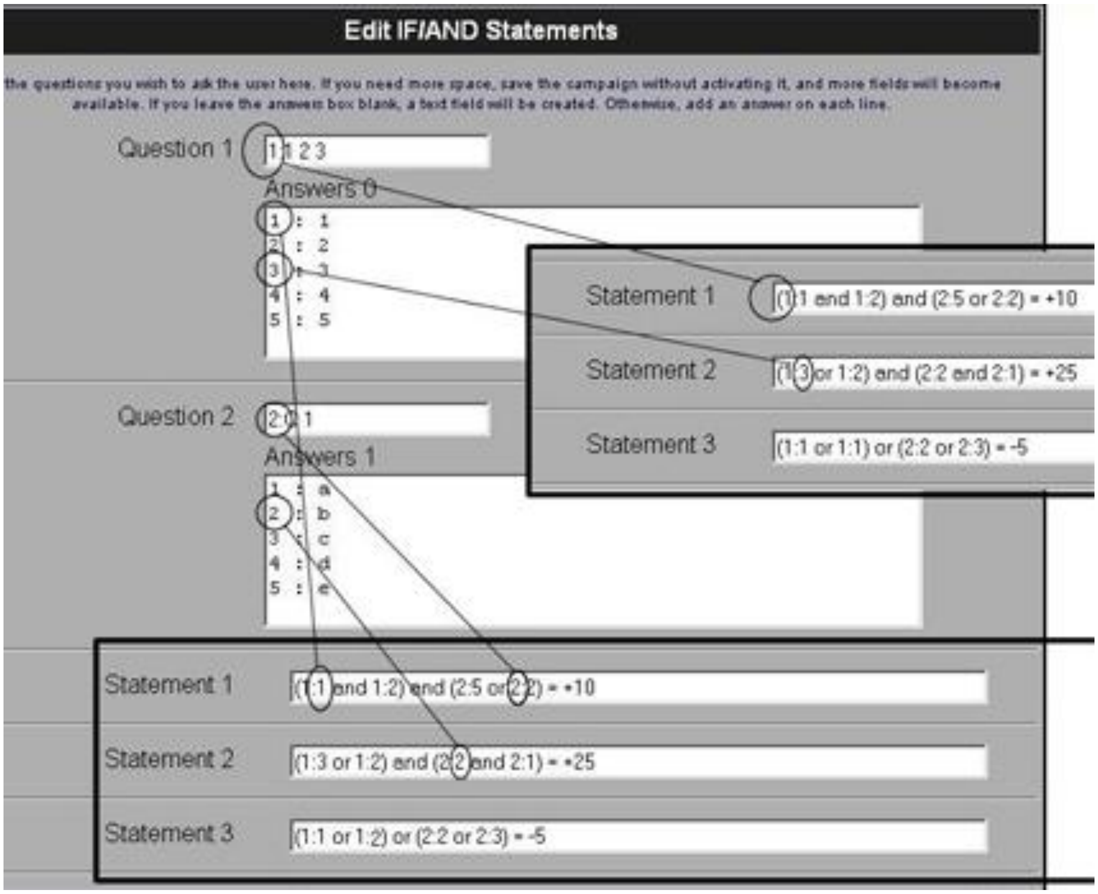
Please use this feature with caution as its complex and easy to make mistakes! In most cases, you should just set a price per lead at the top of the Campaign's "Edit Campaign" page and then use buyer ratios to vary the price for each buyer.

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:

<u>Statement 1:</u> (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.

<u>Statement 2:</u> (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.

<u>Statement 3:</u> (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.

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:

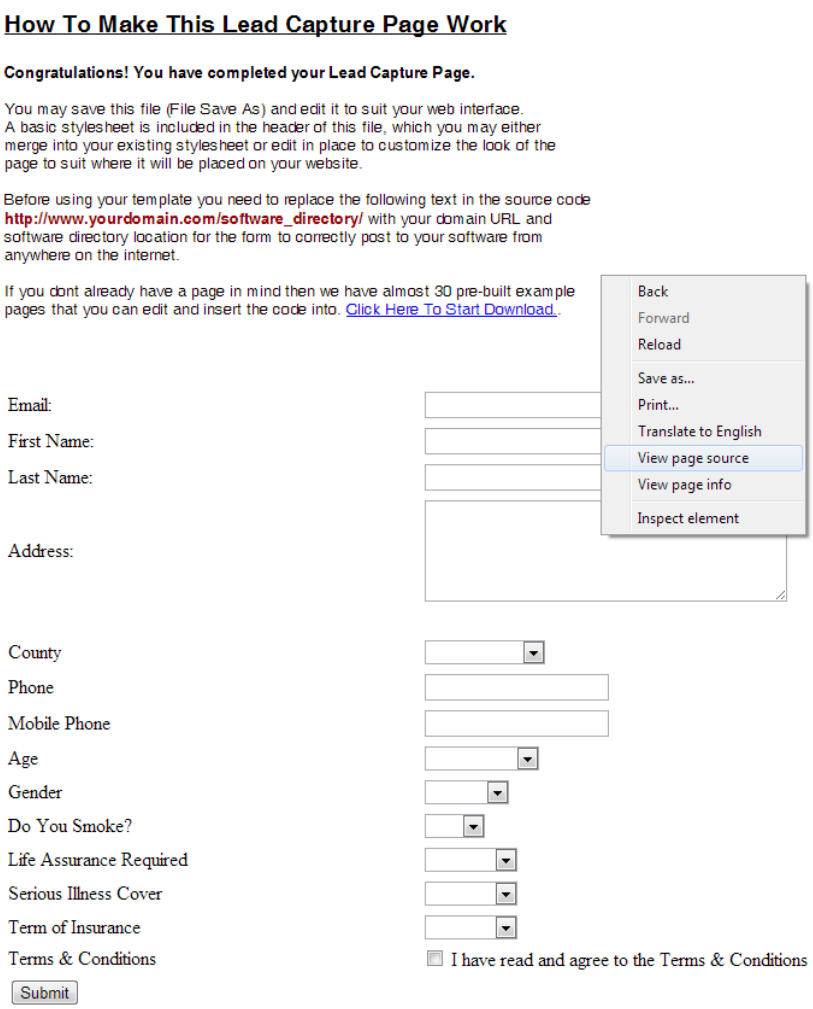
This feature works very well, yet we have always kept the feature in BETA status due to many customers creating statements that are so complex that they end up making mistakes. When mistakes are made it can be very time consuming. Therefore, tech support is not available for this feature. However, if 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!

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" button.



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. Click Here To Start Download.

Back
Forward
Reload
Save as...
Print...
Translate to English
View page source
View page info
Inspect element

Email:
First Name:
Last Name:
Address:
County
Phone
Mobile Phone
Age
Gender
Do You Smoke?
Life Assurance Required
Serious Illness Cover
Term of Insurance
Terms & Conditions — I have read and agree to the Terms & Conditions
Submit

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.

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 `http://www.yourdomain.com/software_directory` 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"> -->
</table>
</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.

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.

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.

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


Search for Leads

Insurance

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	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	136	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
	iqnlnbbvek	iqnlnbbvek	Life Assurance - BetterQuotes.ie	(HIDDEN)	(HIDDEN)					35.00	159	0	View
	bpcesedjbq	bpcesedjbq	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

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First Previous 1 2 3 4 5 Next Last

Buy Leads

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

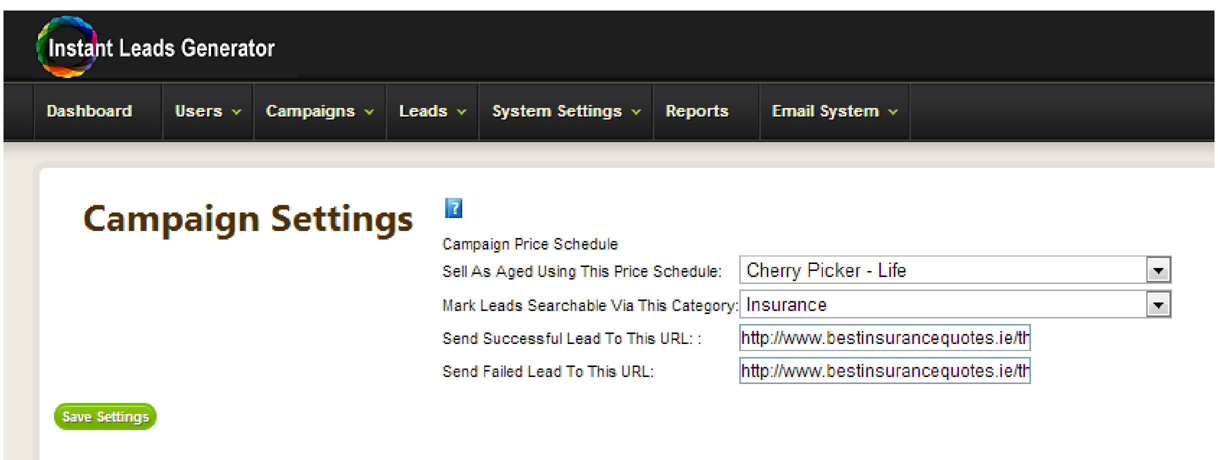
14.1 Pricing Schedules & Searchable Categories

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.

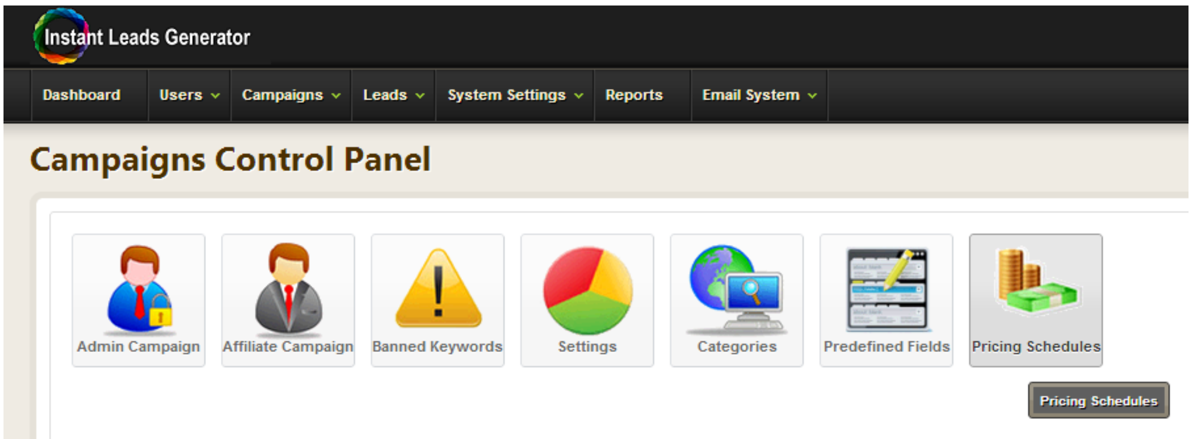
Here is what it looks like:



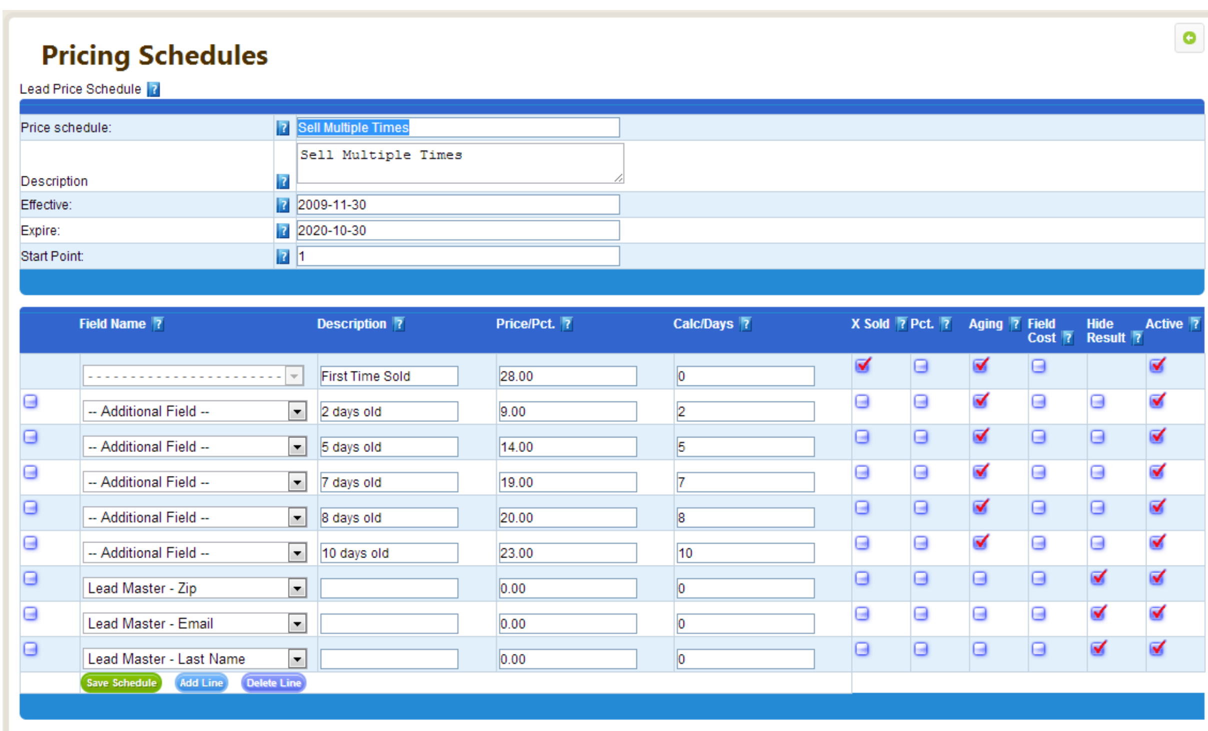
Once you do this, any buyer who is subscribed to this campaign will be able to search for, find and buy aged/unsold leads on their Search for Leads page. However, please note that the buyer can only search for leads in the campaigns that they are subscribed to, and other campaigns that they are not subscribed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

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:



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.

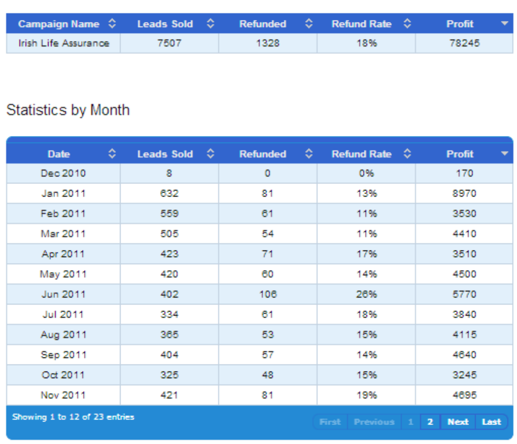
Instantly spot those that are less than ideal and always be aware of which ones are sending back too many leads for refund. These reports will also enable you to instantly spot problematic lead sources and help you to fine tune every aspect of your business for maximum profitability.

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.

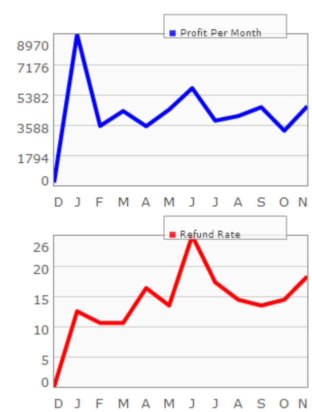


Campaign Name	Leads Sold	Refunded	Refund Rate	Profit
Irish Life Assurance	7507	1328	18%	78245

Statistics by Month

Date	Leads Sold	Refunded	Refund Rate	Profit
Dec 2010	8	0	0%	170
Jan 2011	632	81	13%	8970
Feb 2011	559	61	11%	3530
Mar 2011	505	54	11%	4410
Apr 2011	423	71	17%	3510
May 2011	420	60	14%	4500
Jun 2011	402	106	26%	5770
Jul 2011	334	61	18%	3840
Aug 2011	365	53	15%	4115
Sep 2011	404	57	14%	4640
Oct 2011	325	48	15%	3245
Nov 2011	421	81	19%	4695

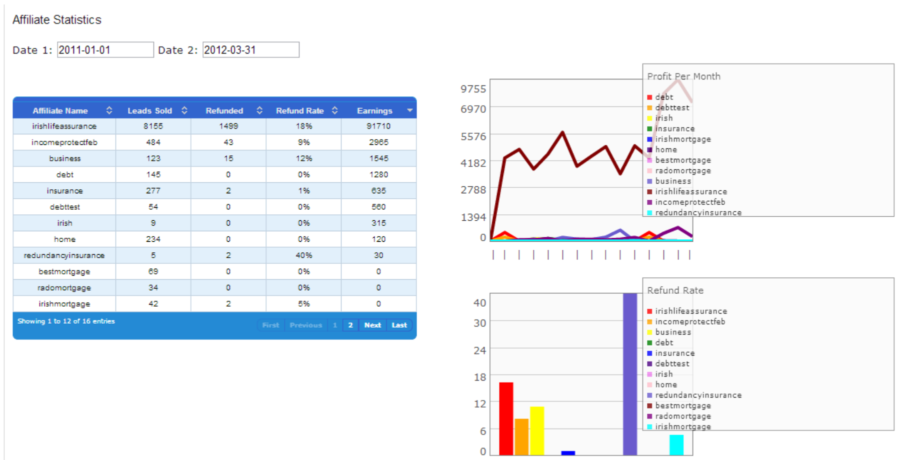
Showing 1 to 12 of 23 entries First Previous 1 2 Next Last



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.



Affiliate Statistics

Date 1: 2011-01-01 Date 2: 2012-03-31

Affiliate Name	Leads Sold	Refunded	Refund Rate	Earnings
irishlifeassurance	8155	1499	18%	91710
incomeprotectfeb	484	43	9%	2965
business	123	15	12%	1545
debt	145	0	0%	1280
insurance	277	2	1%	635
debttest	54	0	0%	560
irish	9	0	0%	315
home	234	0	0%	120
redundancyinsurance	5	2	40%	30
bestmortgage	69	0	0%	0
radomortgage	34	0	0%	0
irishmortgage	42	2	5%	0

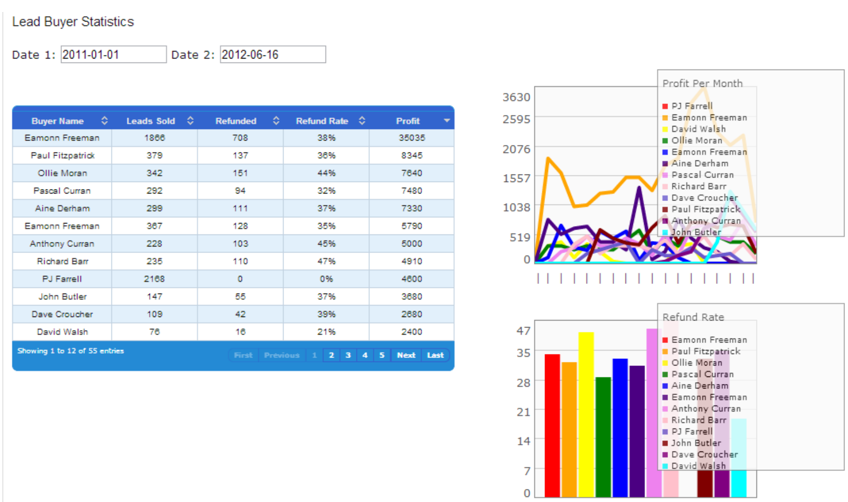
Showing 1 to 12 of 16 entries First Previous 1 2 Next Last

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



Lead Buyer Statistics

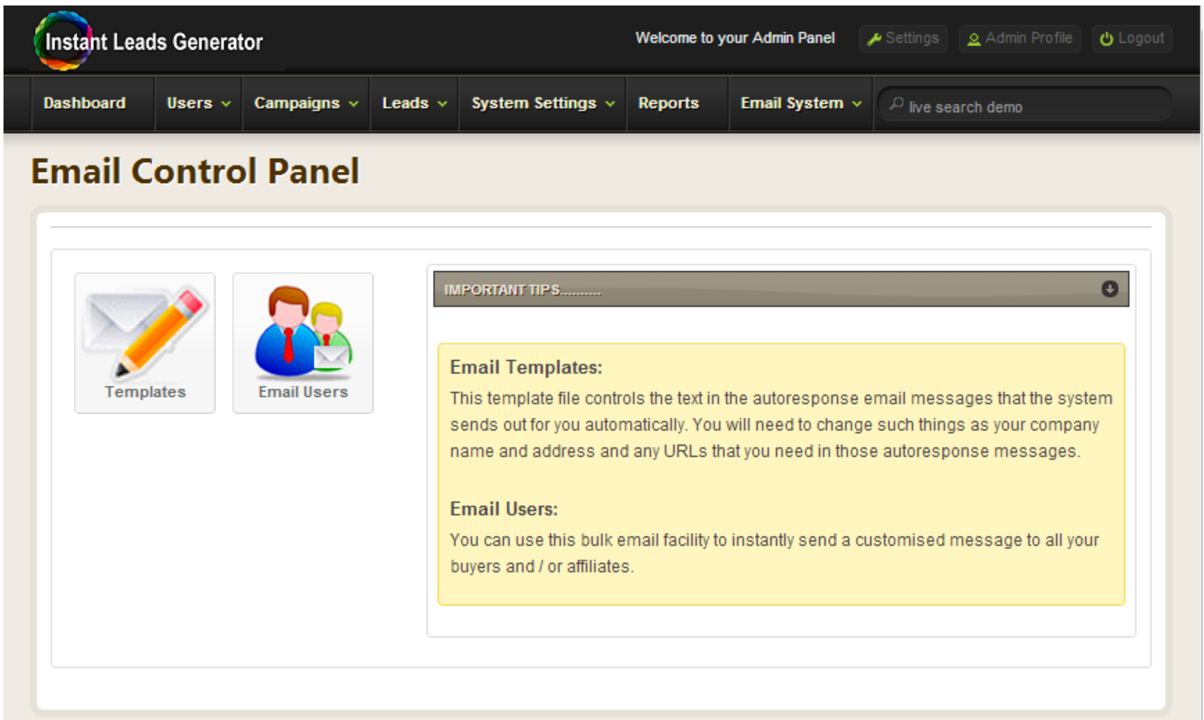
Date 1: 2011-01-01 Date 2: 2012-06-16

Buyer Name	Leads Sold	Refunded	Refund Rate	Profit
Eamonn Freeman	1866	708	38%	35035
Paul Fitzpatrick	379	137	36%	8345
Ollie Moran	342	151	44%	7640
Pascal Curran	292	94	32%	7480
Aine Derham	299	111	37%	7330
Eamonn Freeman	367	128	35%	5790
Anthony Curran	228	103	45%	5000
Richard Barr	235	110	47%	4910
PJ Farrell	2168	0	0%	4600
John Butler	147	55	37%	3680
Dave Croucher	109	42	39%	2680
David Walsh	76	16	21%	2400

Showing 1 to 12 of 55 entries First Previous 1 2 3 4 5 Next Last

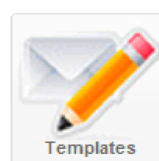
16 Email Control Panel

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.



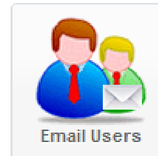
16.1 Templates

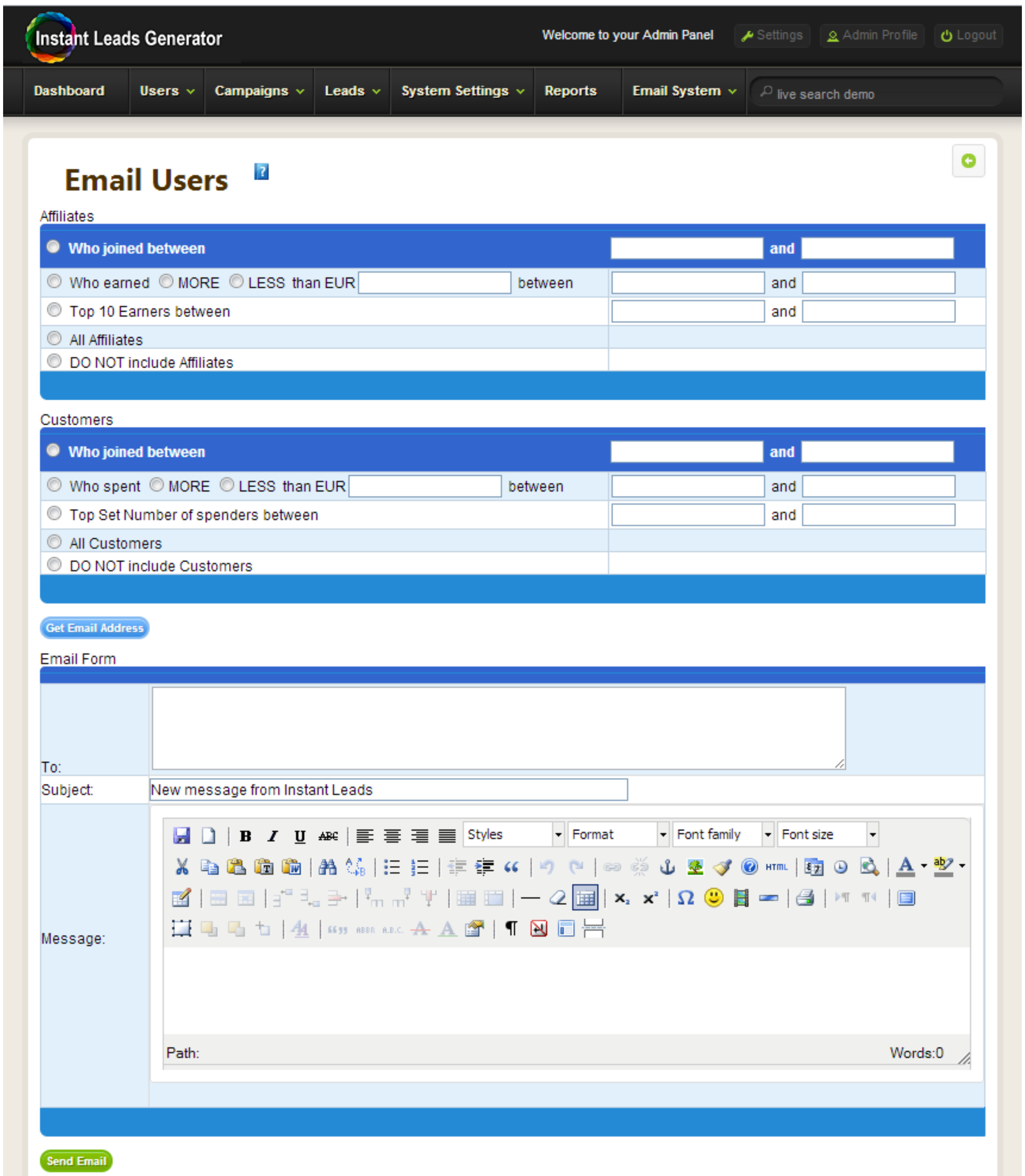
This allows you to edit the text in the autoresponse email messages that the system sends out for you automatically. You will need to change such things as your company name and address and any URLs that you need in those autoresponse messages.



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.





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”.

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

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 www.domain_name.com/upgrade/ is fine, but www.domain_name.com/directory/uprgade/ will not allow the software to function correrctly.

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.

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:

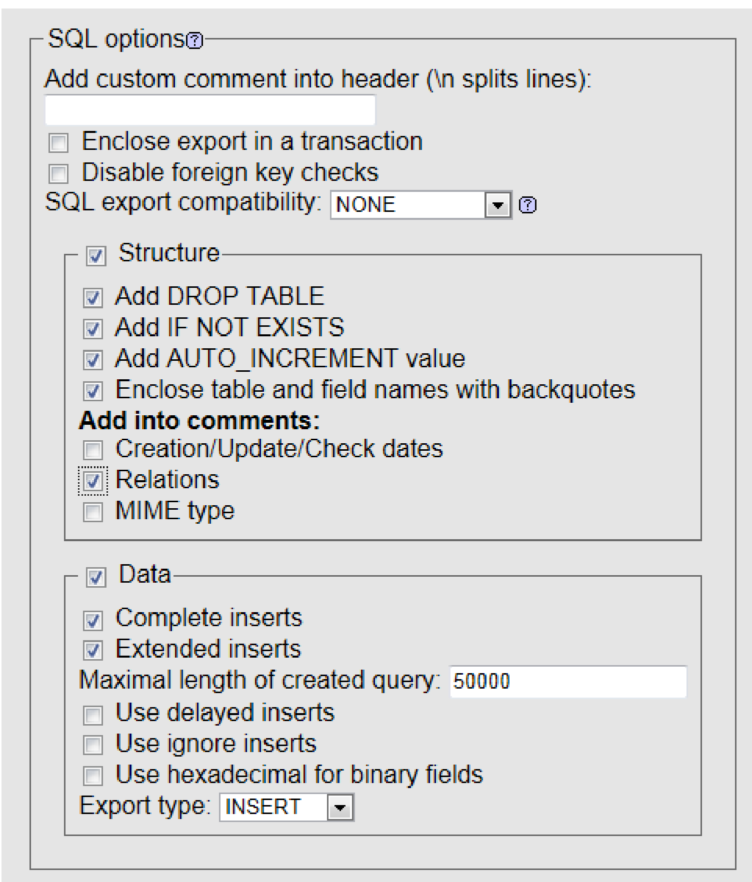
YOUR_DATABASE_NAME
YOUR_DATABASE_USERNAME
YOUR_DATABASE_PASSWORD
http://DOMAIN_NAME/upgrade/
PAYPAL_EMAIL_ADDRESS

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, take a full backup of your original database (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

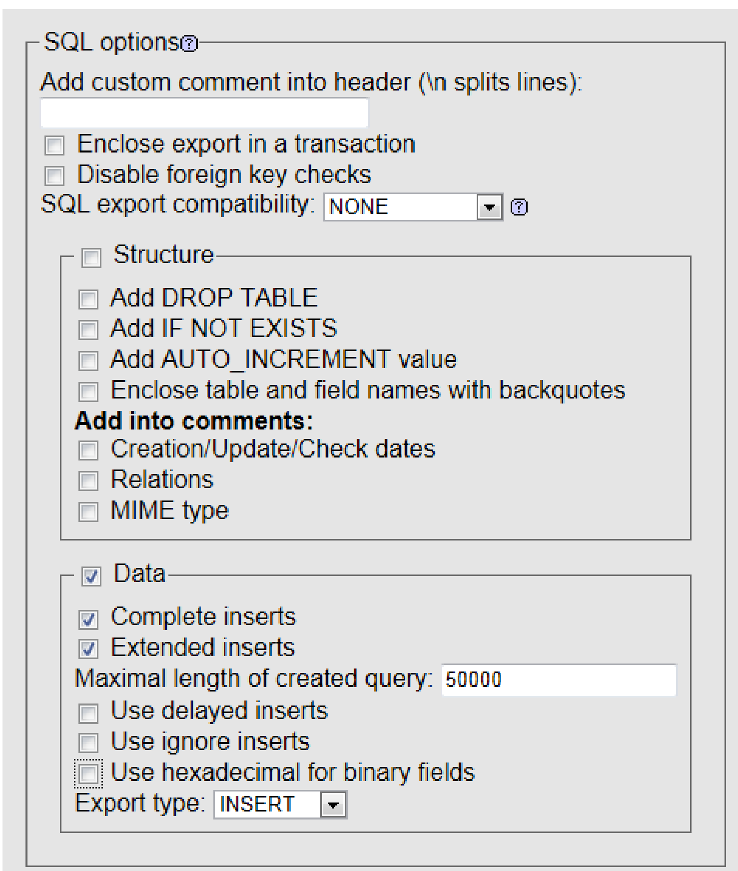


2.9 Step 9

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 only the data 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

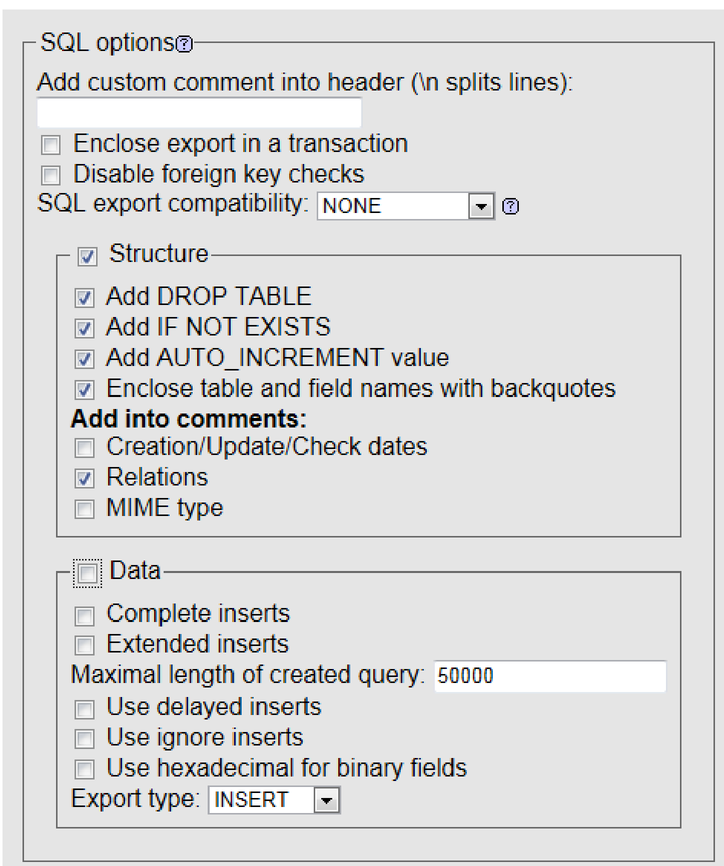
You need to follow this same process for each and every table in your database, except for the "custom_fields" table (you have already saved this table along with its data in step 9 above).

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:



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: www.domain.com/upgrade/ then you will need to open this URL: www.domain.com/upgrade/synch_ts.php

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.

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.

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="exact" 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[]=self-employed&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. <u>You will also need to give them every field name</u> exactly as it appears on your campaign's lead capture form.