

LEADS360

# 11.4 Leads360 Release Notes

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## User Scripting

### Overview

User Scripting is enabled at the client level. By Default it will be turned on for all enterprise clients

User Scripting has no new **Client Settings**. There are changes to the both the **Groups Settings** page and the **User Settings** page (SettingsManager.aspx) for administrators only.

Users having different roles in Leads360 will have access to different user script features.

- Administrators can Add/Modify/Delete/View Scripts and add data to scripts
- Users can only view scripts and add data to scripts for leads which they own
- Power Users can only view scripts and add data to scripts for any lead
- Group Managers can only view scripts and add data to scripts for leads they own, or are owned by a member of the group they manage

From a user perspective, user scripts are functionally another way to add data to a lead record.

### User Scripting - Administrator

#### Settings

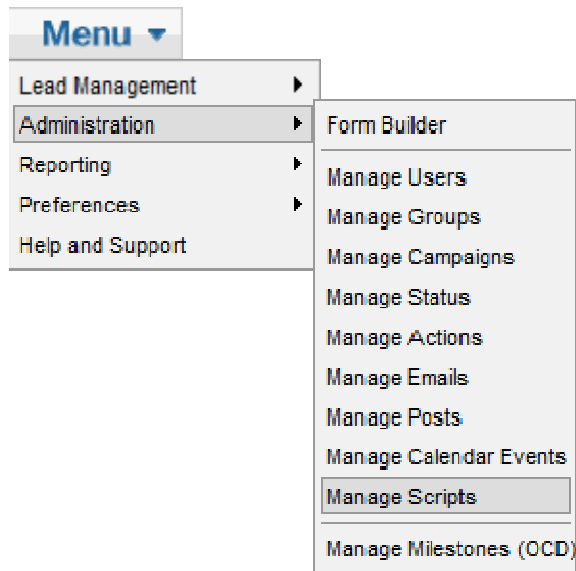
There are no client settings for using the User Scripting feature. There is a setting that can be applied at the group or user level. The user and group setting are configured on user and group settings page respectively. Click the **Settings** link in the **Options** column on either the **Manage Groups** page or the **Manage Users** page.

Lead Script Form Is Accessible:	<input checked="" type="radio"/> No <input type="radio"/> Yes
Lead Script Form Is Default View:	<input checked="" type="radio"/> No <input type="radio"/> Yes

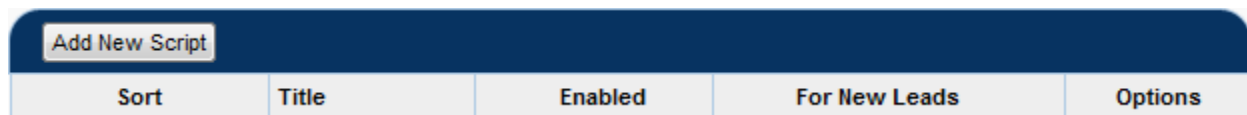
- **Lead Script Form is Accessible** – Click yes to make the script view of the Add/Edit Lead page accessible to the group or user
- **Lead Form is Default View** – Click yes to make the Script view the default view of the Add/Edit lead page for the group or user

## Creating a Script to be used for Adding New Leads (No Filters – For Adding Leads)

First, navigate to the **Manage Scripts** page by clicking **Manage Scripts** on the **Administration** submenu.



The **Manage Scripts** page will load with no scripts. The **Manage Scripts** page will be explained in greater detail in a later section of this document.



Click the **Add New Script** button to add a script.

The **Add/Edit Script** page will load.

The image shows the 'Script Details' form. It includes a 'Return to Scripts' button in the top right. The form has a 'Title:' label followed by a text input field. Below that is a checkbox labeled 'Reveal Script Elements One at a Time:'. A 'Save' button is located in the bottom right corner.

Give the script a **Title** and click the **Save** button.

**Reveal Script Elements One at a Time** - Scripts are made up of a series of questions and/or statements. By default the full script will display to users. It will appear as a list of questions and statements. Clicking the **Reveal Script Elements One at a Time** checkbox will make it so questions and statements appear only one at a time. When this option is selected, a user clicks the next button to reveal the next script element.

After saving the script, the **Compose Script** tab and the **Lead Filters: Which leads?** tabs will become visible. This script will be the one that is used for adding new leads. As such, there will be no lead data to filter on, so no filters will be applied to this script.

The screenshot shows the 'Adding New Leads' form with the 'Script Details' tab selected. The title field contains 'Adding New Leads'. Below the title, there is a checkbox labeled 'Reveal Script Elements One at a Time' which is currently unchecked. At the bottom right of the form, there is a 'Save' button.

Click the **Compose Script** tab to compose the script. The Compose Script tab will load with no script elements.

The screenshot shows the 'Adding New Leads' form with the 'Compose Script' tab selected. The 'Script Element' field is empty. To the right, there is a 'Field' dropdown menu with 'Search...' selected. An 'Add Script Element' button is located to the right of the dropdown. Below the form, there is a table with the following structure:

ID	Order	Script Element	Field	Required	Options
This script doesn't have any script elements yet. Add some.					

### Adding Script Elements

The screenshot shows the 'Adding New Leads' form with the 'Compose Script' tab selected. The 'Script Element' field is highlighted with a yellow border, indicating it is the active input area for adding a new script element. The 'Field' dropdown menu is still set to 'Search...'. An 'Add Script Element' button is visible to the right. Below the form, there is a table with the following structure:

ID	Order	Script Element	Field	Required	Options
This script doesn't have any script elements yet. Add some.					

In the left hand column, labeled **Script Element**, enter the text that you would like to appear on the script. Choose a corresponding field that should be populated after the script element is read. Note that Script Elements can be added to the script without associating a field.

Note that you can use **Field Tags** in **Script Elements**. The script being created in this example is for brand new, unsaved leads. This is the lead form as it would appear when clicking **Add New Lead** on the **Lead Management** submenu. In this case, the lead contains no data, so **Field Tags** should not be used here.

Script Details **Compose Script** Lead Filters: Which leads?

Adding New Leads Return to Scripts

Script Element	Field	Options
<div style="border: 2px solid yellow; padding: 5px;">This call may be recorded for quality and training purposes.</div>	Search...	Add Script Element

ID	Order	Script Element	Field	Required	Options
This script doesn't have any script elements yet. Add some.					

The first **Script Element** added to this script does not have a field associated with it. It is a statement that must be read to the lead indicating that the call may be recorded.

Once the **Script Element** has been typed in, click the **Add Script Element** button to add the **Script Element** to the script.

Script Details **Compose Script** Lead Filters: Which leads?

Adding New Leads Return to Scripts

Script Element	Field	Options
<div style="border: 2px solid yellow; padding: 5px;">This call may be recorded for quality and training purposes.</div>	Search...	Add Script Element

ID	Order	Script Element	Field	Required	Options
This script doesn't have any script elements yet. Add some.					

The **Script Element** appears in the bottom half of the form

Script Details **Compose Script** Lead Filters: Which leads?

Adding New Leads Return to Scripts

Script Element	Field	Options
<div style="border: 2px solid yellow; padding: 5px;">This call may be recorded for quality and training purposes.</div>	Search...	Add Script Element

ID	Order	Script Element	Field	Required	Options
2	↑↓	This call may be recorded for quality and training purposes.	[No field]	No	Edit   Delete

Follow the same steps to adding a Script Element that has a field associated with it but also select a field from the **Field** dropdown. The example below asks for the lead for their first name. The **First Name** field is associated with the **Script Element**.

Script Details | **Compose Script** | Lead Filters: Which leads?

Adding New Leads Return to Scripts

Script Element [View Field Tags](#) | Field | Options

What is your first name? | First Name | Add Script Element

ID	Order	Script Element	Field	Required	Options
2	↕	This call may be recorded for quality and training purposes.	[No field]	No	<a href="#">Edit</a>   <a href="#">Delete</a>

After clicking the **Add Script Element** button the script element appears in list below.

Script Details | **Compose Script** | Lead Filters: Which leads?

Adding New Leads Return to Scripts

Script Element [View Field Tags](#) | Field | Options

Search... | Add Script Element

ID	Order	Script Element	Field	Required	Options
2	↕	This call may be recorded for quality and training purposes.	[No field]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
3	↕	What is your first name?	[First Name]	No	<a href="#">Edit</a>   <a href="#">Delete</a>

Follow these steps to add all of the **Script Elements** to your script.

Script Details | **Compose Script** | Lead Filters: Which leads?

Adding New Leads Return to Scripts

Script Element [View Field Tags](#) | Field | Options

Search... | Add Script Element

ID	Order	Script Element	Field	Required	Options
12	↕	This call may be recorded for quality and training purposes.	[No field]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
13	↕	What is your first name?	[First Name]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
14	↕	What is your last name?	[Last Name]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
15	↕	Throughout this process, I'll be needing to send you some documents via email. Can I have your email address?	[Email]	No	<a href="#">Edit</a>   <a href="#">Delete</a>

The bottom half of the **Compose Script** tab has the following functionalities:

- Click the arrows in the **Order** column to reorder the **Script Elements**.
- All **Script Elements** are not required by default. Click the **No** value in the **Required** column to require that the field be populated in order for the **User Script** to be saved. It is not possible to require a **Script Element** that does not have an associated field. Note that the **Required** setting on the **Add/Edit Lead** page in script view is different from the required setting that appears on the **Add/Edit Lead** page in normal view.
  - Making a field required on the **Add/Edit Lead** page in *normal view* is done on the **Form Builder**
  - Making a field required on the **Add/Edit Lead** page in *script view* is done here on the **Compose Script** tab of the **Add/Edit Script** page
- Click the **Edit** link in the **Options** column to edit the **Script Element**
- Click the **Delete** link in the **Options** column to delete the **Script Element**

### Editing a Script Element

**Script Elements** can be edited. It is possible to edit the **Script Element** text or the change the associated field.

Click the **Edit** link in the **Options** column to edit a **Script Element**.

Script Details
**Compose Script**
Lead Filters: Which leads?

Return to Scripts

Script Element [View Field Tags](#)

Field

Search...

Options

Add Script Element

ID	Order	Script Element	Field	Required	Options
12		This call may be recorded for quality and training purposes.	[No field]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
13		What is your first name?	[First Name]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
14		What is your last name?	[Last Name]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
15		Throughout this process, I'll be needing to send you some documents via email. Can I have your email address?	[Email]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
16		What state do you live in?	[State]	No	<a href="#">Edit</a>   <a href="#">Delete</a>

The **Script Element** will load in the top half of the form for editing.

Script Details		Compose Script	Lead Filters: Which leads?		
Adding New Leads			<a href="#">Return to Scripts</a>		
Script Element <a href="#">View Field Tags</a>		Field	Options		
<input type="text" value="What state do you live in?"/>		<input type="text" value="State"/>	<input type="button" value="Update Script Element"/> <input type="button" value="Cancel"/>		
ID	Order	Script Element	Field	Required	Options
12		This call may be recorded for quality and training purposes.	[No field]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
13		What is your first name?	[First Name]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
14		What is your last name?	[Last Name]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
15		Throughout this process, I'll be needing to send you some documents via email. Can I have your email address?	[Email]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
16		What state do you live in?	[State]	No	<a href="#">Edit</a>   <a href="#">Delete</a>

Make any needed changes and click the **Update Script Element** button. Click the **Cancel** button to abandon changes.

When the Script is complete, click the **Return to Scripts** button.

## Creating a Script with Filters

Add New Script				
Sort	Title	Enabled	For New Leads	Options
	Adding New Leads	No	No	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>

Click the **Add New Script** button to add a script.

The **Add/Edit Script** page will load.

Script Details	
<a href="#">Return to Scripts</a>	
Title:	<input type="text"/>
Reveal Script Elements One at a Time:	<input type="checkbox"/>
<input type="button" value="Save"/>	

Give the script a **Title** and click the **Save** button.

Script Details	Compose Script	Lead Filters: Which leads?
California		<a href="#">Return to Scripts</a>
Title: <input type="text" value="California"/>		
Reveal Script Elements One at a Time: <input checked="" type="checkbox"/>		
		<a href="#">Save</a>

**Reveal Script Elements One at a Time** - Scripts are made up of a series of questions and/or statements. By default the full script will display to users. It will appear as a list of questions and statements. Clicking the **Reveal Script Elements One at a Time** checkbox will make it so questions and statements appear only one at a time. When this option is selected, a user clicks the next button to reveal the next script element. *This setting is selected for this example.*

After saving the script, the **Compose Script** tab and the **Lead Filters: Which leads?** tabs will become visible.

Script Details	Compose Script	Lead Filters: Which leads?
California		<a href="#">Return to Scripts</a>
Title: <input type="text" value="California"/>		
Reveal Script Elements One at a Time: <input checked="" type="checkbox"/>		
		<a href="#">Save</a>

Click the **Compose Script** tab to compose the script. The Compose Script tab will load with no script elements.

Script Details	Compose Script	Lead Filters: Which leads?			
Adding New Leads		<a href="#">Return to Scripts</a>			
Script Element <a href="#">View Field Tags</a>	Field	Options			
<input type="text"/>	<input type="text" value="Search..."/>	<a href="#">Add Script Element</a>			
ID	Order	Script Element	Field	Required	Options
This script doesn't have any script elements yet. Add some.					

If necessary, review the steps above in the **Adding Script Elements** section of this document.

When the **Script Elements** are added, they are listed on the bottom half of the form.

Script Details		Compose Script		Lead Filters: Which leads?	
California					Return to Scripts
Script Element <a href="#">View Field Tags</a>			Field	Options	
<div style="border: 1px solid #ccc; height: 60px;"></div>			Search...	Add Script Element	
ID	Order	Script Element	Field	Required	Options
17	↕	Hi, {First Name}. Thanks for taking the time to speak with me. I understand that you live in California. We have a special offer for people living in California.	[No field]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
18	↕	If you don't mind, I'd like to learn a little more about your situation. Are you married?	[Marital Status]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
19	↕	What is your spouses first name?	[Spouse First Name]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
20	↕	Does your spouse also have the last name {Last Name}? If not, what is your spouses last name?	[Spouse Last Name]	No	<a href="#">Edit</a>   <a href="#">Delete</a>

Note that two of the **Script Elements** in this script use field tags.

Script Details		Compose Script		Lead Filters: Which leads?	
California					Return to Scripts
Script Element <a href="#">View Field Tags</a>			Field	Options	
<div style="border: 1px solid #ccc; height: 60px;"></div>			Search...	Add Script Element	
ID	Order	Script Element	Field	Required	Options
17	↕	Hi, {First Name}. Thanks for taking the time to speak with me. I understand that you live in California. We have a special offer for people living in California.	[No field]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
18	↕	If you don't mind, I'd like to learn a little more about your situation. Are you married?	[Marital Status]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
19	↕	What is your spouses first name?	[Spouse First Name]	No	<a href="#">Edit</a>   <a href="#">Delete</a>
20	↕	Does your spouse also have the last name {Last Name}? If not, what is your spouses last name?	[Spouse Last Name]	No	<a href="#">Edit</a>   <a href="#">Delete</a>

### Adding Filters to a Script

Without filters, any script could potentially be served to any lead. Filters are applied to target certain leads with appropriate scripts.

Click the **Lead Filters: Which leads?** tab.

Script Details		Compose Script		Lead Filters: Which leads?	
California					Return to Scripts
Column		Operator	Value	Options	
Search...					
Current Filters					

Create a filter by selecting a field from the **Column** dropdown, an **Operator** and a **Value**. Then click the **Add Filter** button.

Script Details	Compose Script	Lead Filters: Which leads?	
California			<a href="#">Return to Scripts</a>
Column	Operator	Value	Options
State	Equal to	CA	<a href="#">Add Filter</a>
Current Filters			
There are no filters.			

When the filter has been added it will appear in the list of **Current Filters** on the bottom of the form.

Script Details	Compose Script	Lead Filters: Which leads?	
California			<a href="#">Return to Scripts</a>
Column	Operator	Value	Options
Search...			
Current Filters			
[State] equal to CA			<a href="#">Edit</a>   <a href="#">Delete</a>

With this filter added this script can only be served to leads where the **State** value equals **CA**.

When the script is composed and filters have been applied, click the **Return to Scripts** button to reload the **Manage Scripts** page.

## Manage Scripts Pages

The **Manage Scripts** page has a few different tools for managing scripts.

Add New Script				
Sort	Title	Enabled	For New Leads	Options
↑↓	Application	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↑↓	Closed Lead - Solicit Referral	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↑↓	Follow Up	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↑↓	Adding New Leads	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↑↓	California	<a href="#">No</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>

### Script Sort Order

Click the arrows to reorder the scripts. The order of the scripts matters because a lead will only be served one script at a time. More than one script may be eligible to be served to a lead based on the script filters but only the lead with the highest priority.

### Title

The title of the script appears here.

### Enabled

When scripts are created, they are not enabled by default. Clicking the **No** in the **Enabled** column will toggle the value to **Yes**, enabling the script. Note that a script cannot be enabled if it do not contain at least one **Script Element**. If a script appears in this list but has a non-editable value of **No** in the **Enabled** column, it is because the script does not contain any **Script Elements**.

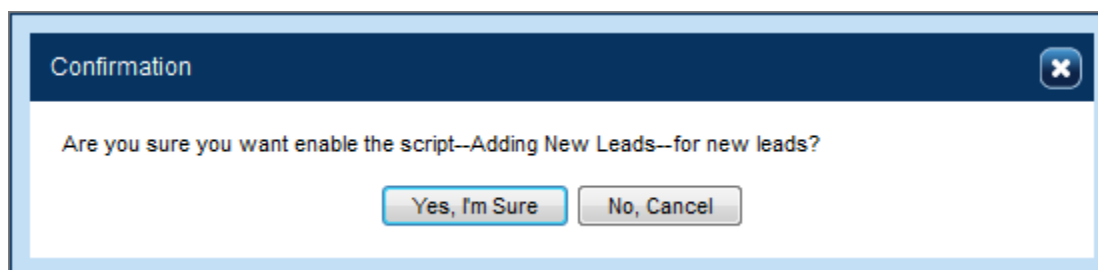
### For New Leads

Here “New” does not refer to the status “New.” Instead, “New” refers to the lead form when it contains no data, and has not been saved. “New” refers to the lead form as it appears when a user clicks **Add New Lead** on the **Lead Management** submenu.

Only one script can be designated as the script that should be used when adding a new lead to the system. The script that is for use with “New” leads will appear at the top of list of scripts. It will not be able to be re-ordered. Selecting a script to be used for “New” leads is done by clicking the **No** value in the **For New Leads** column. This will only be possible if the script is enabled.

Add New Script				
Sort	Title	Enabled	For New Leads	Options
↕	Application	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↕	Closed Lead - Solicit Referral	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↕	Follow Up	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↕	Adding New Leads	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↕	California	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>

Clicking the **No** value in the **For New Leads** column will pop an alert asking you to confirm that you want to use that script for “New” leads.



The script now appears at the top of the list. Once it is designated as the script that is **For New Leads** it cannot be disabled, copied or deleted. If click the Edit link to edit the script, the **Lead Filters: Which leads?** tab will not be accessible.

Add New Script				
Sort	Title	Enabled	For New Leads	Options
↕	Adding New Leads (for new leads)	<a href="#">Yes</a>	<a href="#">Yes</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↕	Application	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↕	Closed Lead - Solicit Referral	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↕	Follow Up	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>
↕	California	<a href="#">Yes</a>	<a href="#">No</a>	<a href="#">Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>

### *Options Column*

The Options column contains three links:

- Edit – Click this link to edit the script. This opens the Add/Edit Script page
- Copy – Click this link to create a copy of the script and open it in the Add/Edit Script page. The copy will have the name “Copy of {script name}”, but in every other way will be the same as the copied script
- Delete – Click this link to delete the script. You will be asked to confirm this action

## User Scripting – User

Users will see the scripting feature on the Add/Edit Lead page. A script is usually a subset of lead form fields with addition additional verbiage. An administrator can set for groups and/or users that the script view is visible and if it is the default view.

### Settings

There are no user settings for the User Scripting feature.

### Add/Edit Lead Page View Tabs

When user scripting is enabled tabs display at the top of the Add/Edit Lead page enabling the user to toggle back and forth between the two views; **Script View** and **Lead Form View**.

The screenshot displays the LEADS360 ENTERPRISE interface. At the top, there is a navigation bar with 'Menu', 'Dashboard', 'Leads', and 'Get Lead' buttons. A search bar is visible with the text 'Search: Leads'. Below the navigation bar, there are filters for Campaign (Self Generated), Status (New), User (Johnson, Matt), and Time Zone. The main content area shows two tabs: 'Lead Form View' and 'Script Form View', with the latter highlighted in yellow. The 'Script Form View' contains a script titled 'Adding New Leads' with the following text: 'This call may be recorded for quality and training purposes.' followed by input fields for 'What is your first name?', 'What is your last name?', and 'Throughout this process, I'll be needing to send you some documents via email. Can I have your email address?'. There is also a dropdown for 'What state do you live in?'. At the bottom right, there are 'Save', 'Save & Close', and 'Cancel' buttons.

The tabs that enable users to switch back and forth between the **Lead Form** view and the **Script View** are only visible if the administrator has enabled script view for the group and/or user. It is also possible for the administrator to stipulate that the **Add/Edit Lead** page loads in script view. If a script is not available for a given lead, the **Add/Edit Lead** page will load in **Lead Form View** and the **Script View** tab will be disabled.

[Harold Westing] Id: 195518 | Date Added: 9/9/2011 9:17 AM | Read-Only:

Campaign: Self Generated Status: New User: Johnson, Matt Time Zone: -- Select Time Zone --

« Prev Lead Next Lead » Save & Go to Next Lead » Options Options - Save Save & Close Cancel

**Lead Form View** Script Form View

Action: -- Select -- Add Action Add Calendar Event

Comment:

Actions Only
 Logs Only
 Actions & Logs
 Calendar Events
 Duplicate Leads

Entry	Comment	User	Date
Email In Process	Template: [General Introductory Email]	[System, Email]	Fri 9/9/2011 9:17 AM
Email In Process	Template: [New Lead Notification]	[System, Email]	Fri 9/9/2011 9:17 AM
Imported	Status: [New], User: [Matt Johnson] - <a href="#">Imported</a>	[Johnson, Matt]	Fri 9/9/2011 9:17 AM

Borrower Information Print Group

Ref Id:

**Spouse Information**

Marital Status: -- Select --

Spouse First Name:

Spouse Last Name:

PD: -- Select --

## Using Script View on the Add/Edit Lead Page

Scripts will appear in one of two ways:

- All **Script Elements** displayed at once
- **Script Elements** displayed one at a time

### *Script Elements Displayed All at Once*

This is an image of a lead being added with a script that displays all **Script Elements** at once. The Actions/Logs section of the lead form does not appear here because the script has not been saved yet.

Campaign: Self Generated Status: New User: Johnson, Matt Time Zone: -- Select Time Zone --

« Prev Lead Next Lead » Save & Go to Next Lead » Options Options - Save Save & Close Cancel

Lead Form View **Script Form View**

**Script: Adding New Leads**

This call may be recorded for quality and training purposes.

What is your first name?

What is your last name?

Throughout this process, I'll be needing to send you some documents via email. Can I have your email address?

What state do you live in? -- Select --

Save Save & Close Cancel

Working the lead from Script View consists of reading the questions and populating fields. It is recommended practice to answer the questions in order and not to save the script until all the questions have been answered. This is because the answer to one question can qualify the lead to be served a different script. In this example, the script being served is for adding new leads. Once the lead form is saved it will qualify for one of two different scripts based on whether the value in the **State** field is CA or something else.

Once the script is saved the Actions/Logs section of the form will load. The workflow for taking actions on leads is the same when working leads in script view. Depending on the lead data a new script may appear. If no script is eligible to be served to the lead given the lead data, the **Add/Edit Lead** page will reload in the **Lead Form View**.

### *Script Elements Displayed One at a Time*

This is an image of a lead being added with a script that reveals **Script Elements** one at a time. The Actions/Logs section of the lead form does appear here because the script has been saved.

The screenshot shows the Leads360 interface for a lead. At the top, there is a header with the user name [Barry Dooley] and lead information: Id: 195520 | Date Added: 9/9/2011 10:10 AM | Read-Only. Below the header, there are dropdown menus for Campaign (Self Generated), Status (New), User (Johnson, Matt), and Time Zone (Select Time Zone). There are also buttons for navigation: « Prev Lead, Next Lead », Save & Go to Next Lead, and Options. Below this, there are buttons for Options, Save, Save & Close, and Cancel. The main content area has two tabs: Lead Form View and Script Form View. The Script Form View is active, showing an Action dropdown (Select) and an Add Action button. Below that is a Comment text area. There are radio buttons for Actions Only, Logs Only, Actions & Logs (selected), Calendar Events, and Duplicate Leads. A table shows the lead's history:

Entry	Comment	User	Date
Email In Process	Template: [General Introductory Email]	[System, Email]	Fri 9/9/2011 10:10 AM
Email In Process	Template: [New Lead Notification]	[System, Email]	Fri 9/9/2011 10:10 AM
Imported	Status: [New], User: [Matt Johnson] - <a href="#">Imported</a>	[Johnson, Matt]	Fri 9/9/2011 10:10 AM

Below the table, there is a section for the script: Script: California. The script content is displayed in a text area: "Hi, Barry. Thanks for taking the time to speak with me. I understand that you live in California. We have a special offer for people living in California." A Next button is visible at the bottom right of the script area. At the bottom of the page, there are buttons for Save, Save & Close, and Cancel.

Working the lead in this view when Script Elements are revealed one at a time consists of reading the Script Elements, populating fields, and clicking the **Next** button to reveal the next script element. Continue through the questions until the last one is reached. When the last question is reached, the **Next** button will not appear.

[Barry Dooley] Id: 195520 | Date Added: 9/9/2011 10:10 AM | Read-Only:

Campaign:  Status:  User:  Time Zone:

« Prev Lead   Next Lead »   Save & Go to Next Lead »   Options   Options -   Save   Save & Close   Cancel

Lead Form View   **Script Form View**

Action:    Add Action   [Add Calendar Event](#)

Comment:

Actions Only  
 Logs Only  
 Actions & Logs  
 Calendar Events  
 Duplicate Leads

Entry	Comment	User	Date
Email In Process	Template: [General Introductory Email]	[System, Email]	Fri 9/9/2011 10:10 AM
Email In Process	Template: [New Lead Notification]	[System, Email]	Fri 9/9/2011 10:10 AM
Imported	Status: [New], User: [Matt Johnson] - <a href="#">Imported</a>	[Johnson, Matt]	Fri 9/9/2011 10:10 AM

**Script: California**

Hi, Barry. Thanks for taking the time to speak with me. I understand that you live in California. We have a special offer for people living in California.

If you don't mind, I'd like to learn a little more about your situation. Are you married?

What is your spouses first name?

Does your spouse also have the last name Dooley? If not, what is your spouses last name?

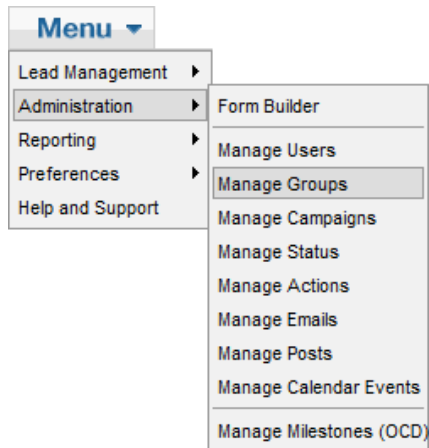
Save   Save & Close   Cancel

When the script is completed the script should be saved and an action should be taken as needed.

## Multiple Managers per Group

Prior to the 11.4 release, it has only been possible to have one manager in per group. As of the 11.4 release it is possible to give multiple users the role of Group Manager in a group.

Click **Manage Groups** on the **Administration** submenu



In the **Options** column click the **Users** link associated with the group you want to give multiple managers.

Order	Title	Status	Manager	Users	Options
29	Western	Active		21	<a href="#">Settings</a>   <a href="#">Users</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
30	North Western	Active		6	<a href="#">Settings</a>   <a href="#">Users</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
31	North Western - East	Active		5	<a href="#">Settings</a>   <a href="#">Users</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
32	South Western	Active	Paul Ryan	10	<a href="#">Settings</a>   <a href="#">Users</a>   <a href="#">Edit</a>   <a href="#">Delete</a>

Assigning the Manager role done by the same method it always has been.

In this example, the **Group Manager** is **Ryan, Paul**.

<a href="#">Return to Manage Groups</a>	
Available Users	Users in Group [South Western]
<div style="border: 1px solid gray; padding: 5px; min-height: 150px;">           *Two, User2            .atest0, dial0            .atest1, dial1            .atest2, dial2            .atest3, dial3            .atest4, dial4            .atest5, dial5            _Ben 1, Schor            2, User            360, Leads            Abrams, Gabby         </div> <div style="text-align: right; margin-top: 5px;"><a href="#">Assign »</a></div>	<div style="border: 1px solid gray; padding: 5px; min-height: 150px;">           lockme, lockme            Reynolds, Scott            Rules, Enterprise            Ryan, Paul (Manager)            Schneider, Rachel            Schneider, Rachel Admin            Schor, Ben            Schor, Ben Admin            Schor, Benjamina            scott, Samantha         </div> <div style="text-align: right; margin-top: 5px;"> <a href="#">« Remove</a>   <a href="#">Set as Manager</a>   <a href="#">Set as User</a> </div>

Click to select the name of another Manager.

<a href="#">Return to Manage Groups</a>	
Available Users	Users in Group [South Western]
<div style="border: 1px solid gray; padding: 5px; min-height: 150px;">           *Two, User2            .atest0, dial0            .atest1, dial1            .atest2, dial2            .atest3, dial3            .atest4, dial4            .atest5, dial5            _Ben 1, Schor            2, User            360, Leads            Abrams, Gabby         </div> <div style="text-align: right; margin-top: 5px;"><a href="#">Assign »</a></div>	<div style="border: 1px solid gray; padding: 5px; min-height: 150px;">           lockme, lockme            Reynolds, Scott            Rules, Enterprise            Ryan, Paul (Manager)            Schneider, Rachel            Schneider, Rachel Admin  <span style="background-color: #0070C0; color: white; padding: 2px;">Schor, Ben</span>            Schor, Ben Admin            Schor, Benjamina            scott, Samantha         </div> <div style="text-align: right; margin-top: 5px;"> <a href="#">« Remove</a>   <a href="#">Set as Manager</a>   <a href="#">Set as User</a> </div>

Click the **Set as Manager** button and both users will be Group Managers with full **Group Manager** privileges.

The screenshot shows a user management interface with two main columns: 'Available Users' and 'Users in Group [South Western]'. A 'Return to Manage Groups' button is in the top right. The 'Available Users' list includes entries like '\*Two, User2', '.atest0, dial0', and '\_Ben 1, Schor'. The 'Users in Group' list includes 'lockme, lockme', 'Reynolds, Scott', 'Ryan, Paul (Manager)', 'Schor, Ben (Manager)', and 'scott, Samantha'. The names 'Ryan, Paul (Manager)' and 'Schor, Ben (Manager)' are highlighted in yellow. Buttons for 'Assign', 'Remove', 'Set as Manager', and 'Set as User' are visible at the bottom of each column.

To revoke the Manager role, click to select the name and then click the **Set as User** button.

Both names will appear in the **Manager** column on the **Manage Groups** page.

Order	Title	Status	Manager	Users	Options
29	Western	Active		21	<a href="#">Settings</a>   <a href="#">Users</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
30	North Western	Active		6	<a href="#">Settings</a>   <a href="#">Users</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
31	North Western - East	Active		5	<a href="#">Settings</a>   <a href="#">Users</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
32	South Western	Active	Ben Schor, Paul Ryan	10	<a href="#">Settings</a>   <a href="#">Users</a>   <a href="#">Edit</a>   <a href="#">Delete</a>

## New filters on View Leads page

Prior to the 11.4 release, applying filters was done by selecting values from dropdown menus. For the 11.4 release, the **filters** on the **View Leads** page have been updated. The new interface makes it easier to apply filters, especially where there are many values to filter on and when filtering on multiple items.

The screenshot shows the LEADS360 ENTERPRISE interface. The top navigation bar includes 'Menu', 'Dashboard', and 'Leads' (selected), with a 'Get Lead' button. A search bar and a dropdown menu are also present. Below the navigation, the page title is 'View Leads' and the user is identified as 'mjohnson@mort.demo (Leads360 - Mortgage Demo)'. The status 'leads: ON calls: ON' is shown in the top right.

The main content area displays a table of leads. Above the table, a filter bar shows the following filters: 'Included Statuses', 'All Groups', 'All Users', 'All Campaigns', and 'From 6/24/2011'. The table has 1680 leads found and is on page 1 of 84. The table columns include: Date Added, Last Action Date, Status, First Name, Last Name, State, Day Phone, Evening Phone, Loan Amount, Loan Type, Loan Purpose, User, Quick Action, Default Action, Campaign, and Options.

Date Added	Last Action Date	Status	First Name	Last Name	State	Day Phone	Evening Phone	Loan Amount	Loan Type	Loan Purpose	User	Quick Action	Default Action	Campaign	Options
9/21/2011 3:58 PM		New	Clinton	Lavigne		(424) 354-9037	(999) 333-4715	\$184,000.00	HELOC	Refinance	Fischer, Avi	Called: No Contact	Called: Contacted/Call Back	Lending Tree	0 0 9
9/21/2011 3:58 PM		New	Hellen	Crittenden		(347) 746-4178	(999) 141-1979	\$264,000.00	HELOC	Refinance	Smith, Devin	Called: No Contact	Called: Contacted/Call Back	Google	0 0 8
9/21/2011 3:52 PM	9/21/2011 4:08 PM	Contacted/Call Back	Ganya	Collado		(857) 209-4210	(999) 236-9925	\$268,000.00	HELOC	Purchase	Fischer, Avi	Does Not Qualify	Application Taken	Lower My Bills	1 1 5
9/21/2011 3:45 PM	9/21/2011 4:38 PM	Application	Easter	Cintron		(424) 354-9037	(999) 828-4746	\$373,000.00	HELOC	Purchase	Barenfeld, Jayson	Funded Loan	Submitted	Referral	1 0 4
9/21/2011 3:43 PM		New	Landers	Levin		(424) 354-9037	(999) 973-9645	\$870,000.00	Conventional	Refinance	Archibald, Nathaniel	Called: No Contact	Called: Contacted/Call Back	Lending Tree	0 0 8
9/21/2011 3:42 PM		New	Caroun	Cramer		(424) 218-6856	(999) 139-5575	\$979,000.00	Conventional	Purchase	Cooper-Dyke, Cynthia	Called: No Contact	Called: Contacted/Call Back	Google	0 0 5
9/21/2011 3:39 PM		New	Novella	Harp		(424) 218-6856	(999) 861-6851	\$528,000.00	Conventional	Refinance	Christopoulos, Tony	Called: No Contact	Called: Contacted/Call Back	Lending Tree	0 0 9
9/21/2011 3:39 PM	9/21/2011 4:15 PM	Application	Shanna	Needham		(347) 746-4178	(999) 809-7943	\$105,000.00	FHA	Construction To Permanent	Crouse, Jeff	Funded Loan	Submitted	Lending Tree	1 0 5
9/21/2011 3:36 PM		New	Herrick	Chu		(678) 404-7547	(999) 904-8546	\$415,000.00	Conventional	Refinance	Johnson, Matt	Called: No Contact	Called: Contacted/Call Back	Lending Tree	0 0 6
9/21/2011 3:36 PM		New	Nayeli	Harder		(857) 209-4210	(999) 155-7095	\$379,000.00	HELOC	Refinance	McClintock, Ryan	Called: No Contact	Called: Contacted/Call Back	Lending Tree	0 0 11
9/21/2011 3:36 PM	9/21/2011 4:09 PM	Application	Brandi	Abraham		(347) 746-4178	(999) 162-2551	\$155,000.00	FHA	Refinance	Kmetovic, Abe	Funded Loan	Submitted	Self Generated	1 0 5

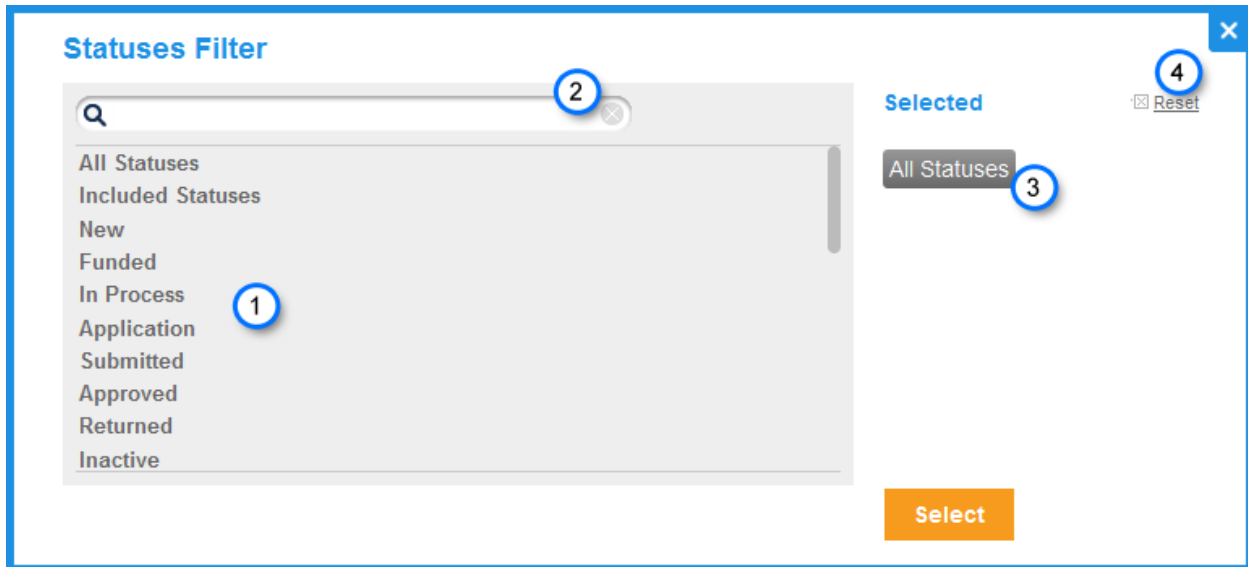
The filter bar displays what filters are currently applied to the leads. In the example above, the status filter has multiple items selected. As such, it displays: **"Included Statuses"** The Groups, Users, and Campaigns filters are all set to include **All**.

## Setting Filters: Statuses, Groups, Users, Campaigns

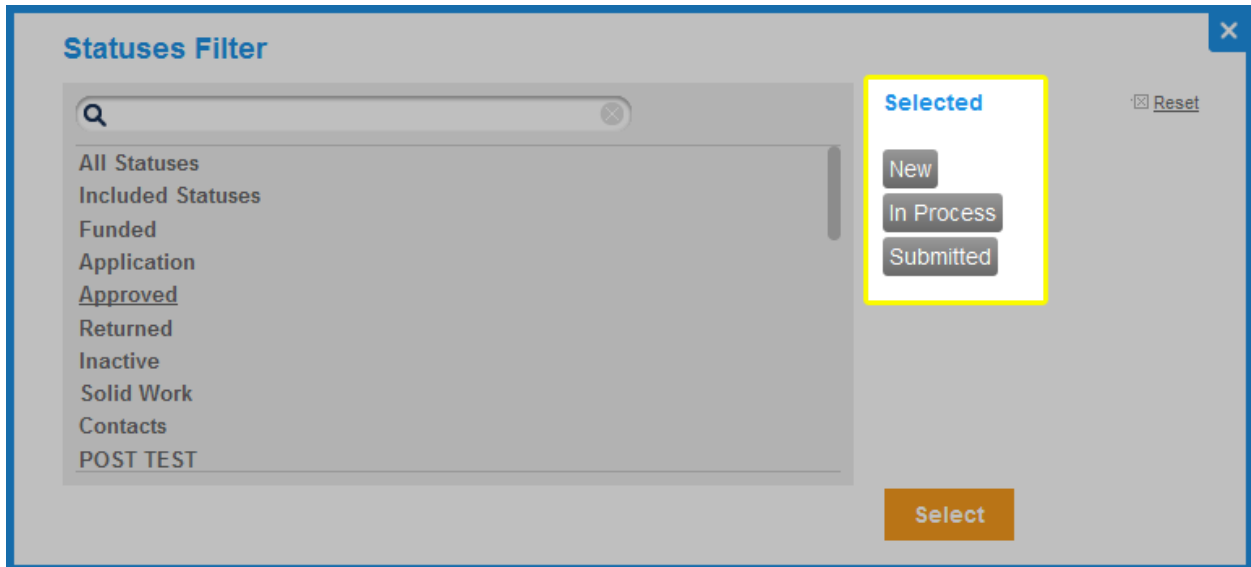
Setting filters on **Statuses**, **Groups**, **Users**, and **Campaigns** is done by the same process which will be demonstrated in the next series of steps. Setting a Date Range filter is done on a different interface, so it will be demonstrated separately.

To apply a filter, click a link in the filters bar to open the popup.

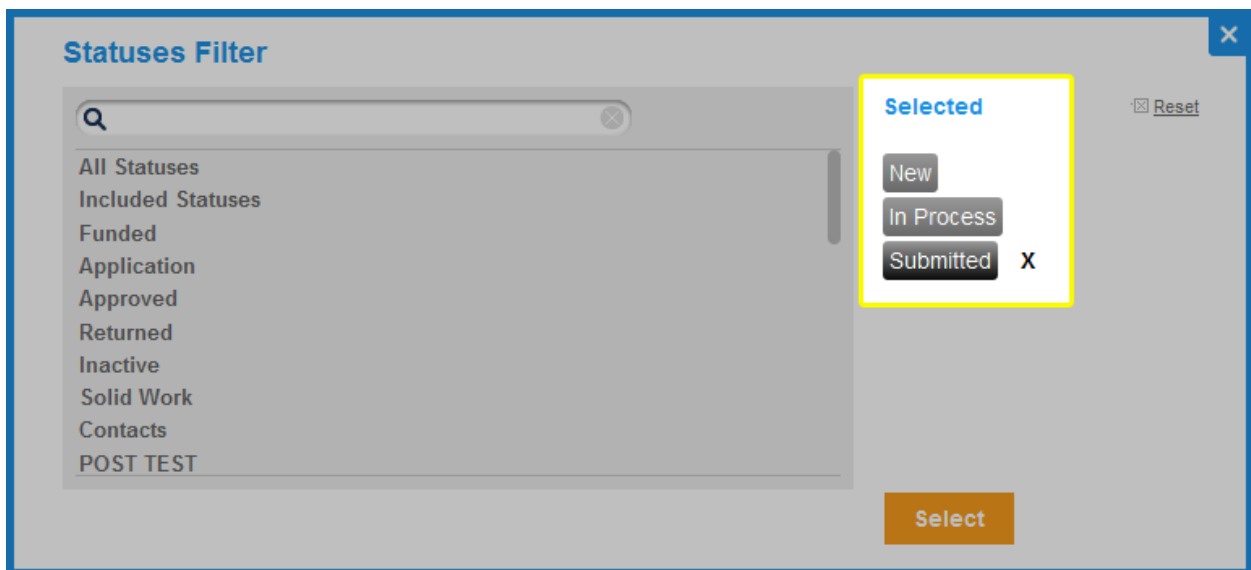
When clicking the **Status** link on the filter bar the popup loads as seen here



1. The list of possible values to filter on appears here. Click a value to filter on it
2. Type into this search field to find values more quickly. Results are returned in real time
3. Selected values appear in this list
4. Click the Reset link to clear the selected filters

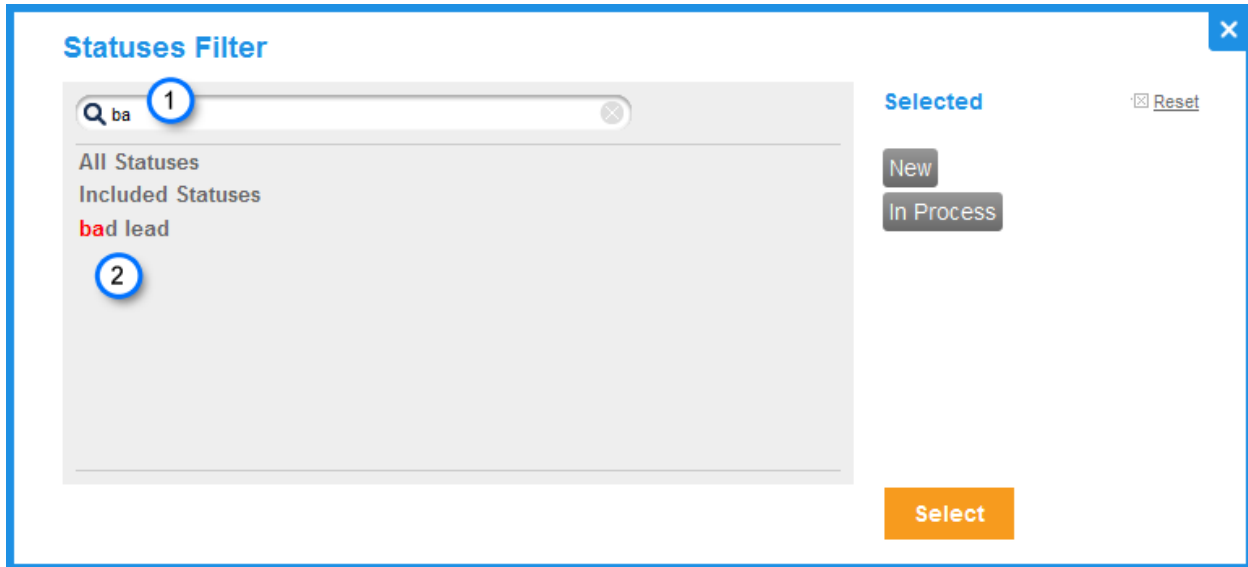


After clicking several statuses they appear here in the **Selected** list

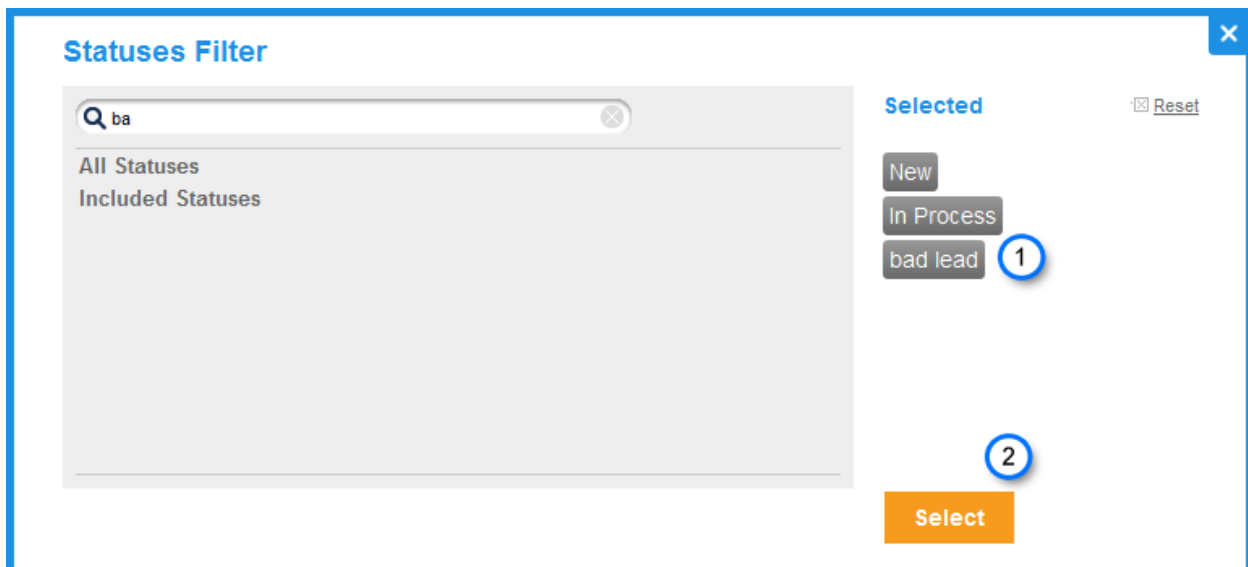


Mousing over a selected value reveals an X. Click the value to remove it from the list of selected values.

## Using the Search field



1. Find a value by typing in the search field
2. Results are returned in real time based on the text appearing in the search field. Click the value to add it to the Selected column



1. The desired set of statuses have been added to the **Selected** list
2. Click the select button to add the filter

## Setting Filters: Time Frame

Click the date range in the filter bar to set the date range filter

**Select Time Frame**

Today Yesterday

Last 7 Days Last Week (MON-SUN) Last Week (MON-FRI)

Last 30 Days Last Month This Month

Specific Dates From  To

Clicking one of the preset date ranges will filter by that time frame.

**Select Time Frame**

Today Yesterday

Last 7 Days Last Week (MON-SUN) Last Week (MON-FRI)

Last 30 Days Last Month This Month

Specific Dates From 09/01/2011 To

September 2011						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Alternatively, it is possible to click in the **Specific Dates** fields to select a date range that way. Click in the **From** field to set the beginning of the date range.

### Select Time Frame

Today

Yesterday

Last 7 Days

Last Week (MON-SUN)

Last Week (MON-FRI)

Last 30 Days

Last Month

This Month

---

**Specific Dates** From  To

Select

◀

September 2011

▶

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Click in the **To** field to set the end of the date range.

### Select Time Frame

Today

Yesterday

Last 7 Days

Last Week (MON-SUN)

Last Week (MON-FRI)

Last 30 Days

Last Month

This Month

---

**Specific Dates** From  To

Select

When the **Specific Dates** time frame has been set, clicking the **Select** button will set the filter.

When the filters are set, they appear in the expanded filter bar.

The screenshot shows the LEADS360 ENTERPRISE interface. At the top, there is a navigation bar with 'Menu', 'Dashboard', and 'Leads' tabs, along with a 'Get Lead' button. A search bar and a dropdown menu for 'Select Field' are also present. Below the navigation bar, there is a 'View Leads' link and a user profile for 'mjohnson@mort.demo (Leads360 - Mortgage Demo)'. The main area displays a filter bar with the following settings: 'New Application bad lead' (highlighted in yellow), 'All Groups', 'All Users', 'All Campaigns', and 'From 6/24/2011 6/24/2011 - 9/22/2011'. To the right of the filter bar, there is a 'Go' button and a '1680 leads found' indicator. Below the filter bar is a table of leads with columns for Date, Status, Name, Group, Phone, Amount, Loan Type, Refinance, Agent, Status, Campaign, and TimeFrame. The table contains 10 rows of lead data.

Date	Status	Name	Group	Phone	Amount	Loan Type	Refinance	Agent	Status	Campaign	TimeFrame
9/21/2011 3:58 PM	New	Hellen	Crittenden	(347) 746-4178 (999) 141-1979	\$264,000.00	HELOC	Refinance	Smith, Devin	No Contact	Google	0 0 8
9/21/2011 3:52 PM	New	Lisimba	Metzger	(347) 746-4178 (999) 500-5746	\$802,000.00	FHA	Refinance	Borgmeyer, Donald	Called: No Contact	Zillow	0 0 7
9/21/2011 3:52 PM	Contacted/Call Back	Ganya	Collado	(857) 209-4210 (999) 236-9925	\$268,000.00	HELOC	Purchase	Fischer, Avi	Does Not Qualify	Lower My Bills	1 1 5
9/21/2011 3:45 PM	Application	Easter	Cintron	(424) 354-9037 (999) 628-4746	\$373,000.00	HELOC	Purchase	Barenfeld, Jayson	Funded Loan	Referral	1 0 4
9/21/2011 3:43 PM	New	Landers	Levin	(424) 354-9037 (999) 973-9645	\$870,000.00	Conventional	Refinance	Archibald, Nathaniel	Called: No Contact	Lending Tree	0 0 8
9/21/2011 3:42 PM	New	Caroun	Cramer	(424) 218-6856 (999) 139-5575	\$979,000.00	Conventional	Purchase	Cooper-Dyke, Cynthia	Called: No Contact	Google	0 0 5
9/21/2011 3:39 PM	New	Novella	Harp	(424) 218-6856 (999) 861-6851	\$528,000.00	Conventional	Refinance	Christopoulos, Tony	Called: No Contact	Lending Tree	0 0 9
9/21/2011 3:39 PM	Application	Shanna	Needham	(347) 746-4178 (999) 809-7943	\$105,000.00	FHA	Construction To Permanent	Crouse, Jeff	Funded Loan	Lending Tree	1 0 5
9/21/2011 3:36 PM	New	Herrick	Chu	(678) 404-2547 (999) 904-8546	\$415,000.00	Conventional	Refinance	Johnson, Matt	Called: No Contact	Lending Tree	0 0 6
9/21/2011 3:36 PM	New	Nayeli	Harder	(857) 209-4210 (999) 155-7095	\$379,000.00	HELOC	Refinance	McClintock, Ryan	Called: No Contact	Lending Tree	0 0 11
9/21/2011 3:36 PM	Application	Brandi	Abraham	(347) 746-4178 (999) 162-2551	\$155,000.00	FHA	Refinance	Kmetovic, Abe	Funded Loan	Self Generated	1 0 5

Clicking the **Search** button on the **Filter** bar will reload the **View Leads** page will reload the page with leads filtered as specified.

## Assign Lead Interface

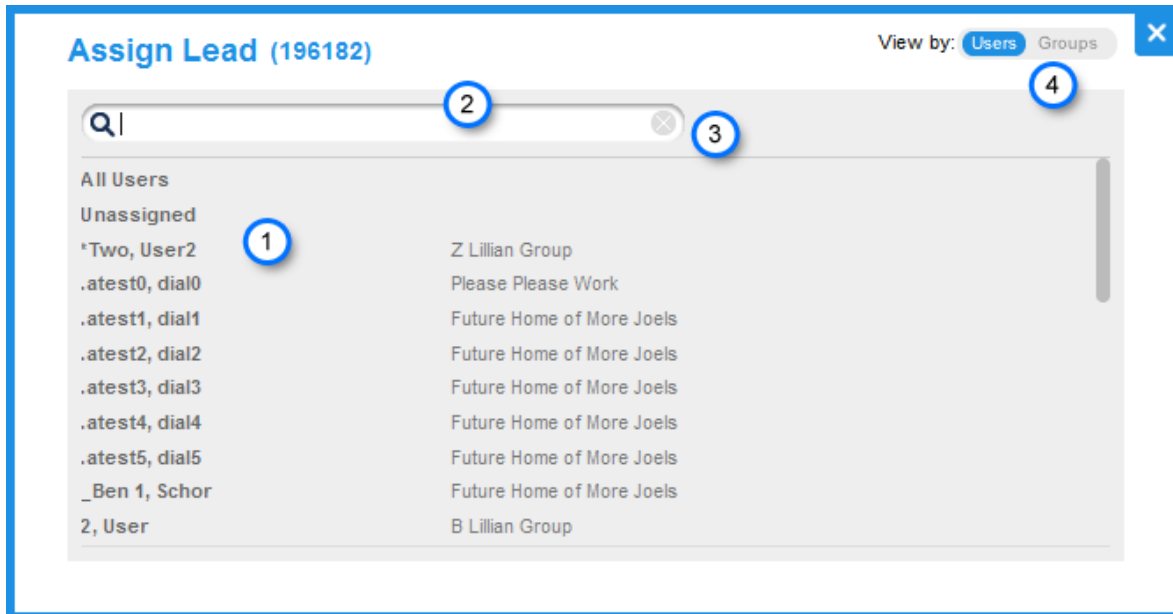
The process for assigning a lead has been improved to make it quicker and easier. On the View Leads page, right-click on the lead you want to assign and click **Assign Lead**.

The screenshot displays the LEADS360 ENTERPRISE interface. At the top, there's a navigation bar with 'Menu', 'Dashboard', and 'Leads' tabs, along with a 'Get Lead' button. Below this is a search bar and a 'View Leads' link. The main content area shows a table of leads with columns for Date Added, Last Action Date, Status, First Name, Last Name, State, Day Phone, Evening Phone, Loan Amount, Loan Type, Loan Purpose, User, Quick Action, Default Action, Campaign, and Options. A context menu is open over the lead for Lisimba Metzger, listing actions such as 'Edit/View Lead', 'View Log/Take Action', 'Add Calendar Event', 'Change Status', 'Assign Lead', 'Print Lead', 'Export Lead', 'Send Email', 'Delete Lead', 'Redistribute Lead', and 'Manually Distribute'. The 'Assign Lead' option is highlighted by the mouse cursor.

Date Added	Last Action Date	Status	First Name	Last Name	State	Day Phone	Evening Phone	Loan Amount	Loan Type	Loan Purpose	User	Quick Action	Default Action	Campaign	Options
9/21/2011 3:58 PM		New	Clinton	Lavigne		(424) 354-9037	(999) 333-1716	\$184,000	Conventional	Refinance	Fischer, Avi	Called: No Contact	Called: Contacted/Call Back	Lending Tree	0 0 9
9/21/2011 3:58 PM		New	Hellen	Crittenden		(347) 746-4178	(999) 141-1979	\$264,000	Conventional	Refinance	Smith, Devin	Called: No Contact	Called: Contacted/Call Back	Google	0 0 8
9/21/2011 3:52 PM		New	Lisimba	Metzger		(347) 746-4178	(999) 500-5746	\$802,000	Conventional	Refinance	Borgmeyer, Donald	Called: No Contact	Called: Contacted/Call Back	Zillow	0 0 7
9/21/2011 3:52 PM	9/21/2011 4:08 PM	Contacted/Call Back	Ganya	Collado		(857) 209-4210	(999) 236-9925	\$268,000	Conventional	Refinance	Fischer, Avi	Does Not Qualify	Application Taken	Lower My Bills	1 1 5
9/21/2011 3:45 PM	9/21/2011 4:38 PM	Application	Easter	Cintron		(424) 354-9037	(999) 328-4746	\$373,000	Conventional	Refinance	Barenfeld, Jayson	Funded Loan	Submitted	Referral	1 0 4
9/21/2011 3:43 PM		New	Landers	Levin		(424) 354-9037	(999) 973-9645	\$870,000.00	Conventional	Refinance	Archibald, Nathaniel	Called: No Contact	Called: Contacted/Call Back	Lending Tree	0 0 8
9/21/2011 3:42 PM		New	Caroun	Cramer		(424) 218-6856	(999) 139-5575	\$979,000.00	Conventional	Purchase	Cooper-Dyke, Cynthia	Called: No Contact	Called: Contacted/Call Back	Google	0 0 5
9/21/2011 3:39 PM		New	Novella	Harp		(424) 218-6856	(999) 861-6851	\$528,000.00	Conventional	Refinance	Christopoulos, Tony	Called: No Contact	Called: Contacted/Call Back	Lending Tree	0 0 9
9/21/2011 3:39 PM	9/21/2011 4:15 PM	Application	Shanna	Needham		(347) 746-4178	(999) 809-7943	\$105,000.00	FHA	Construction To Permanent	Crouse, Jeff	Funded Loan	Submitted	Lending Tree	1 0 5
9/21/2011 3:36 PM		New	Herrick	Chu		(678) 404-2547	(999) 904-9546	\$415,000.00	Conventional	Refinance	Johnson, Matt	Called: No Contact	Called: Contacted/Call Back	Lending Tree	0 0 6
9/21/2011 3:36 PM		New	Nayeli	Harder		(857) 209-4210	(999) 155-7095	\$379,000.00	HELOC	Refinance	McClintock, Ryan	Called: No Contact	Called: Contacted/Call Back	Lending Tree	0 0 11
9/21/2011 3:36 PM	9/21/2011 4:09 PM	Application	Brandi	Abraham		(347) 746-4178	(999) 162-2551	\$155,000.00	FHA	Refinance	Kmetovic, Abe	Funded Loan	Submitted	Self Generated	1 0 5

## Lead Assignment Popup - Users

The Lead Assignment popup will load. Clicking the name of a user will assign the lead to that user.



1. The list of users appears here. Clicking a users name closes the popup and assigns the lead.
2. Type characters into the search field to search for a user. Results are returned in real time as the field is updated
3. Click the X to clear the search field
4. The Assign Lead popup is displaying the list of **Users**. Clicking the **Groups** button will display the list of **Groups**

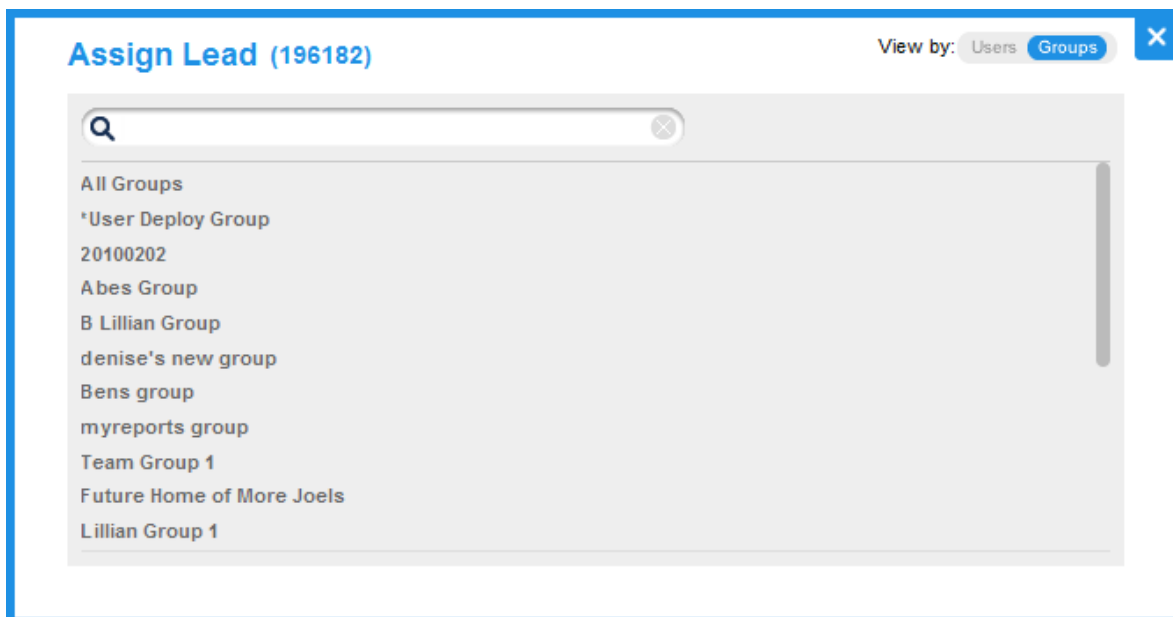
### Lead Assignment Popup – User Search

When characters are typed into the search field results are returned in real time. The text that is entered into the field is highlighted in each of the search results.

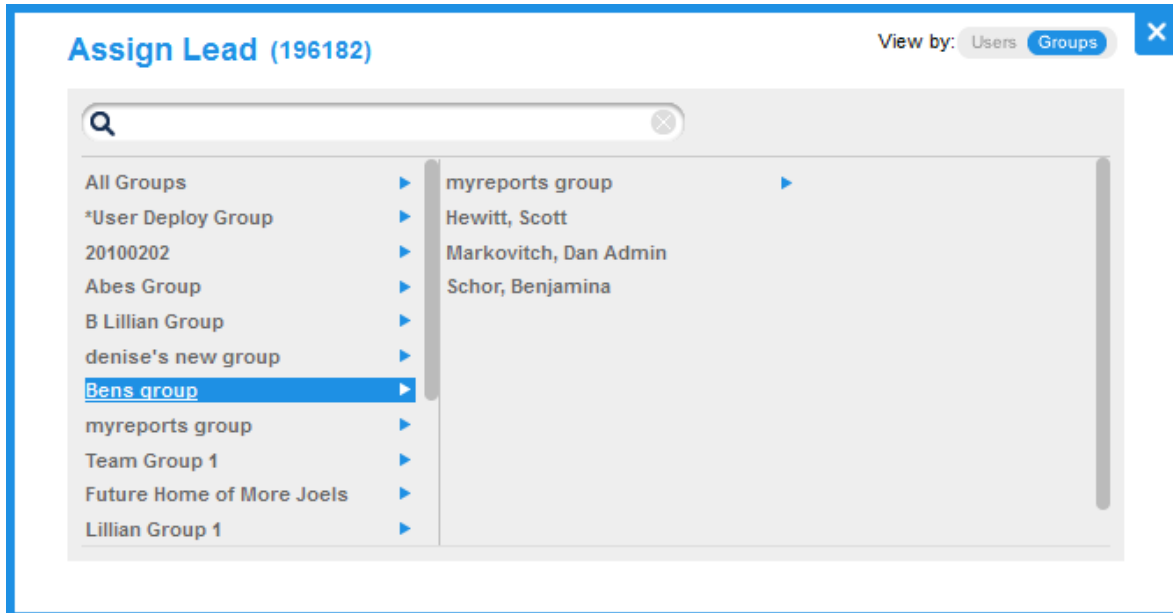


### Lead Assignment Popup – Groups

When the **Groups** button is selected the **Groups** are listed.

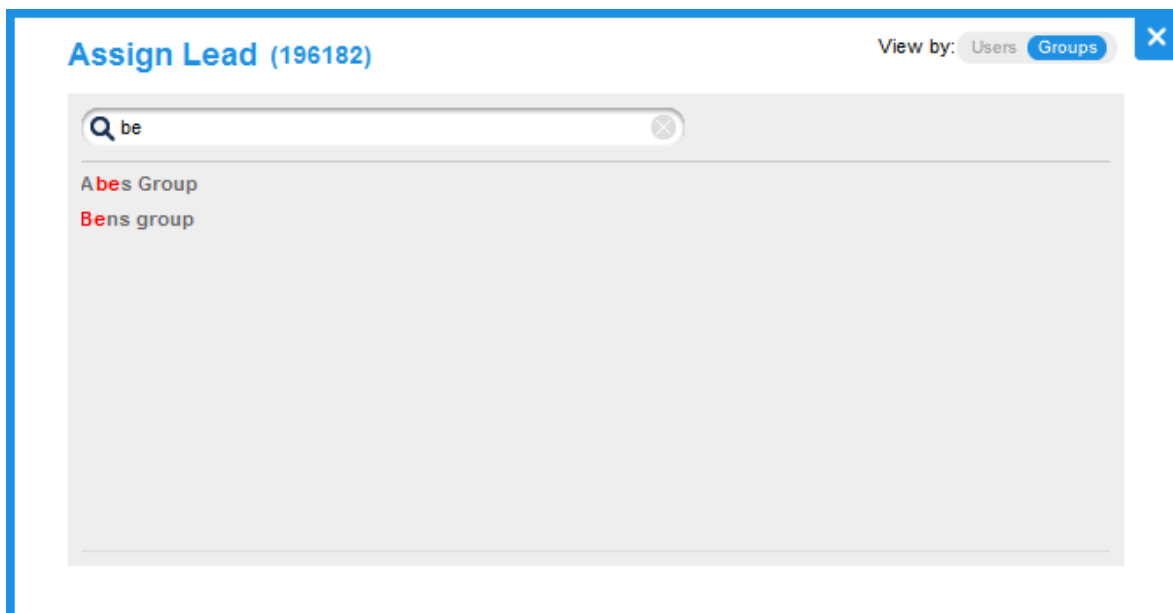


Clicking a group name will display the groups or subgroups users that are in that group.



#### Lead Assignment Popup – Group Search

When characters are typed into the search field results are returned in real time. The text that is entered into the field is highlighted in each of the search results.



If a **Group** contains one or more **Subgroups**, they will be listed in the column to the right of the **Groups** column and the **Users** will be displayed in the column to the right of the **Subgroup** column.

