LEADS360

11.4 Leads360 Release Notes

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.

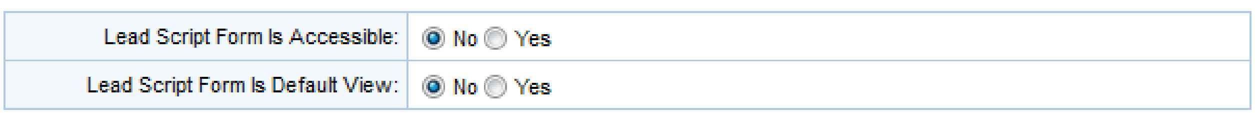
- Administrators can Add/Modify/Delete/View Scripts and add data to scripts
- Users can only view scripts and add data to scripts for leads which they own
- Power Users can only view scripts and add data to scripts for any lead
- Group Managers can only view scripts and add data to scripts for leads 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

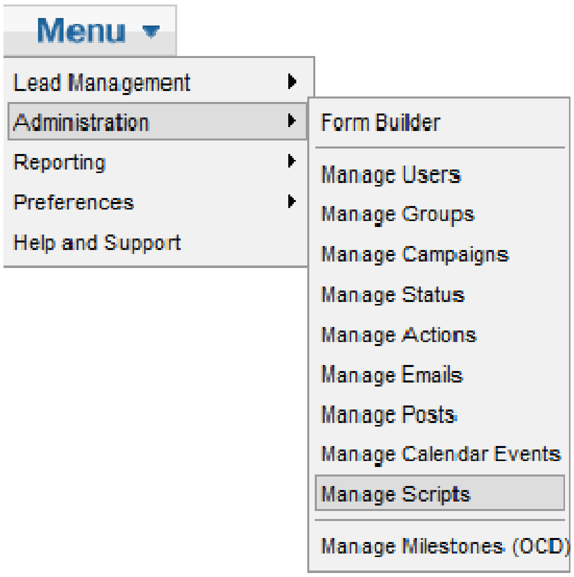
There are no client settings for using the User Scripting feature. There is a setting that can be applied at the group or user level. The user and group setting are configured on user and group settings page respectively. Click the **Settings** link in the **Options** column on either the **Manage Groups**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



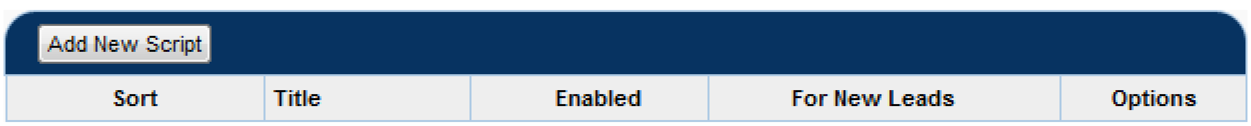
- **Lead Script Form is Accessible** – Click yes to make the script view of the Add/Edit Lead page accessible to the group or user
- **Lead Form is Default View** – Click yes to make the Script view the default view of the Add/Edit lead page for the group or user

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.

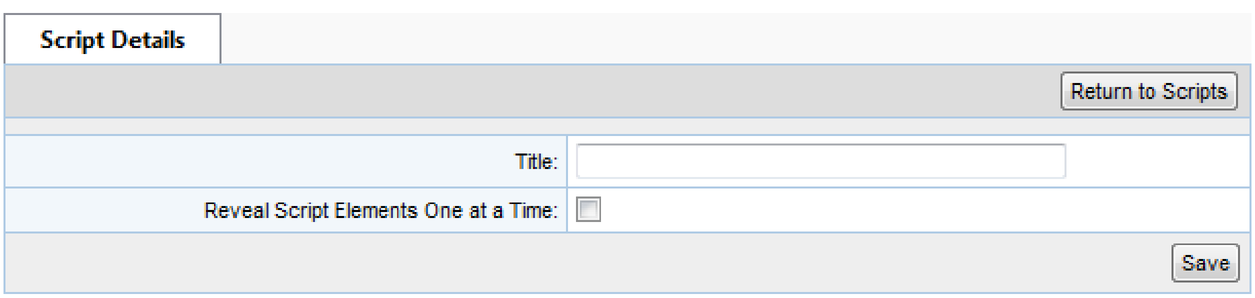


The **Manage Scripts** page will load with no scripts. The **Manage Scripts** page will be explained in greater detail in a later section of this document.



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

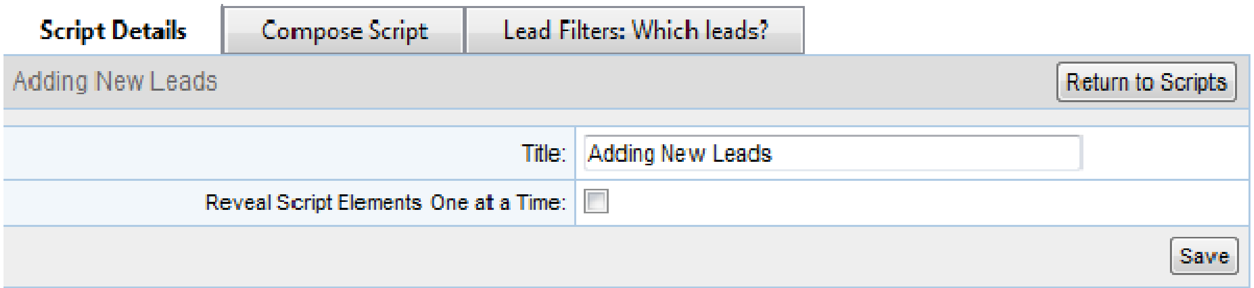
The **Add/Edit Script** page will load.



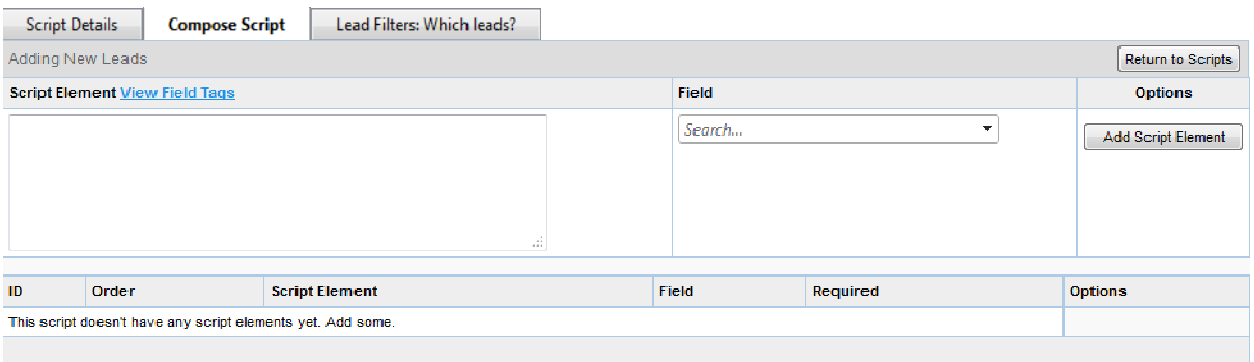
Give the script a **Title** and click the **Save** button.

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.

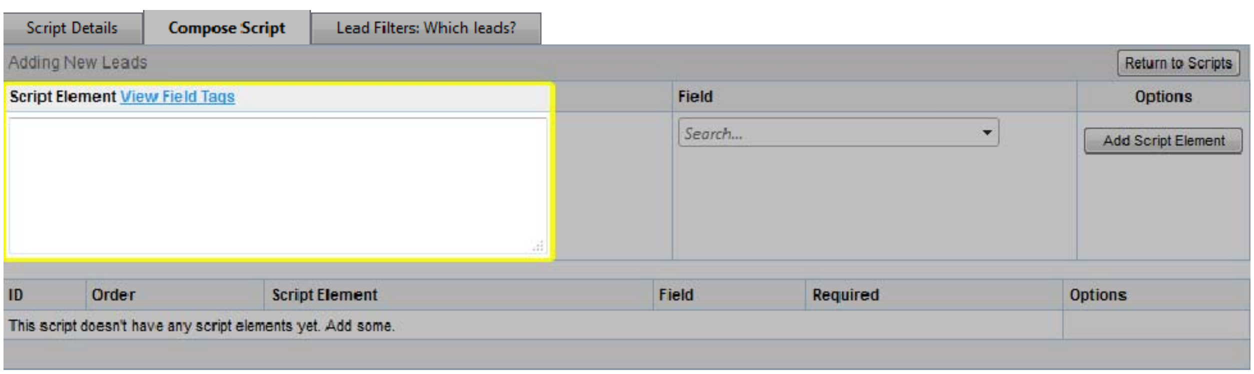
After saving the script, the **Compose Script** tab and the **Lead Filters: Which leads?** tabs will become visible. This script will be the one that is used for adding new leads. As such, there will be no lead data to filter on, so no filters will be applied to this script.



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

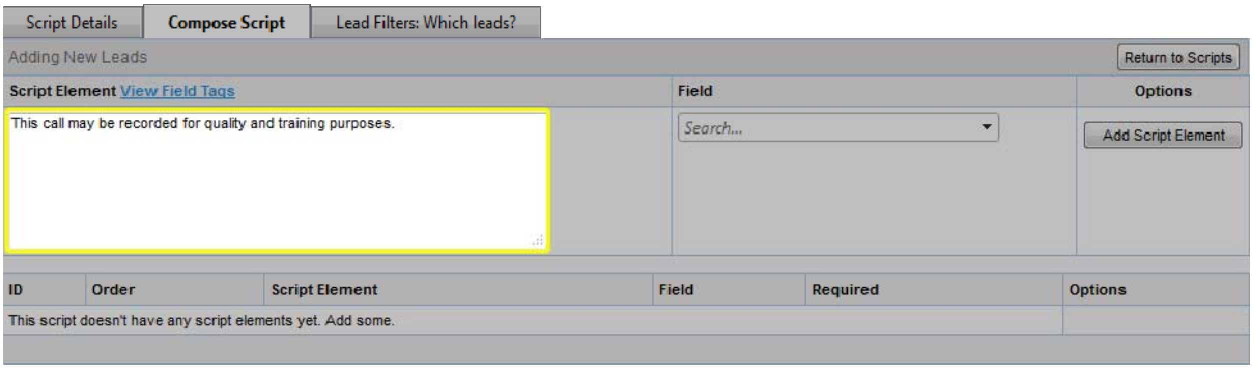


Adding Script Elements



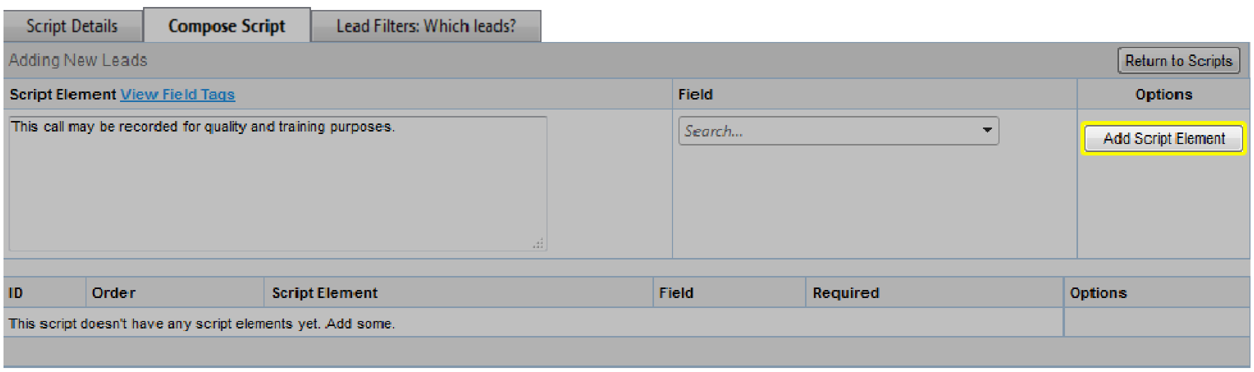
In the left hand column, labeled **Script Element**, enter the text that you would like to appear on the script. Choose a corresponding field that should be populated after the script element is read. Note that Script Elements can be added to the script without associating a field.

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.

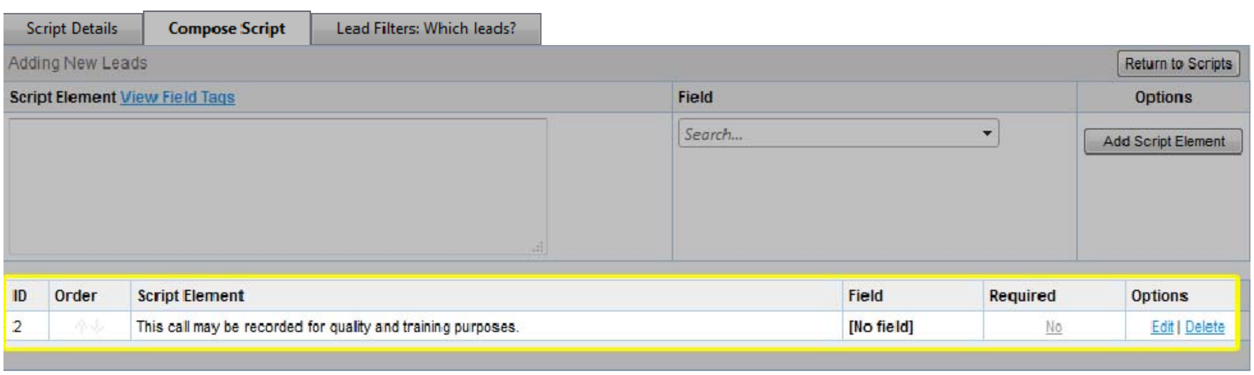


The first **Script Element** added to this script does not have a field associated with it. It is a statement that must be read to the lead indicating that the call may be recorded.

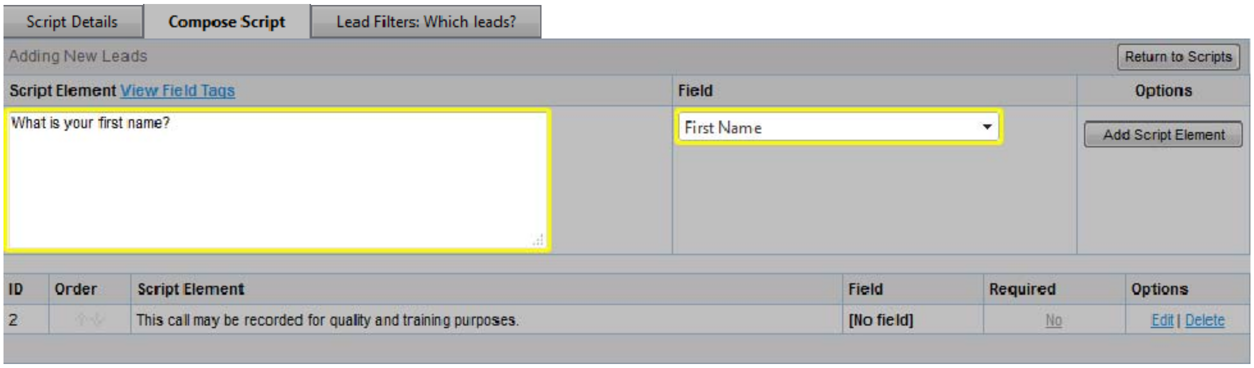
Once the **Script Element** has been typed in, click the **Add Script Element** button to add the **Script Element** to the script.



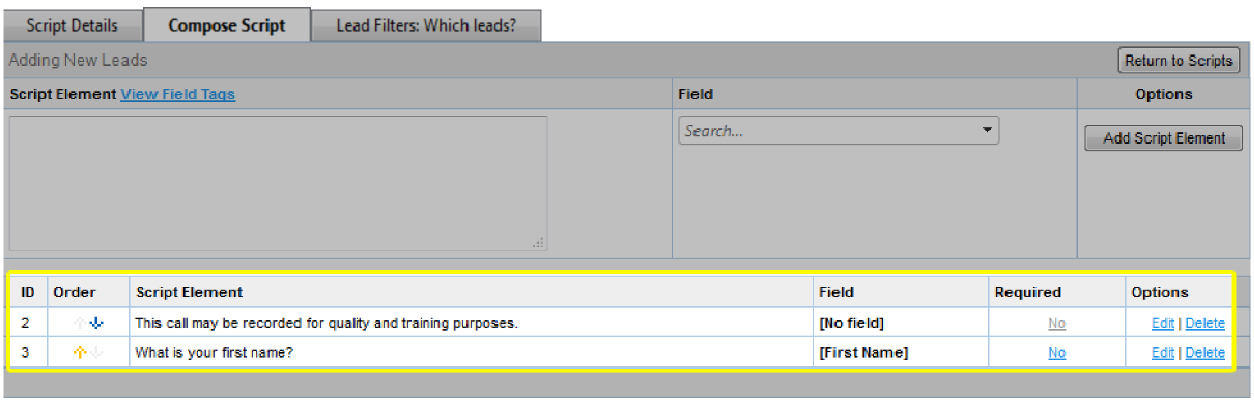
The **Script Element** appears in the bottom half of the form



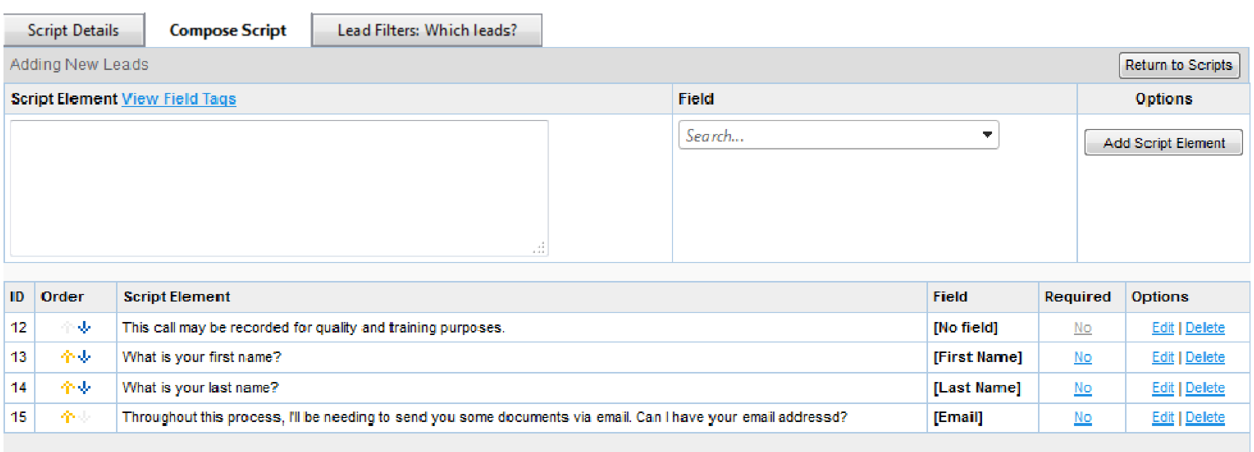
Follow the same steps to adding a Script Element that has a field associated with it but also select a field from the **Field** dropdown. The example below asks for the lead for their first name. The **First Name** field is associated with the **Script Element**.



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



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



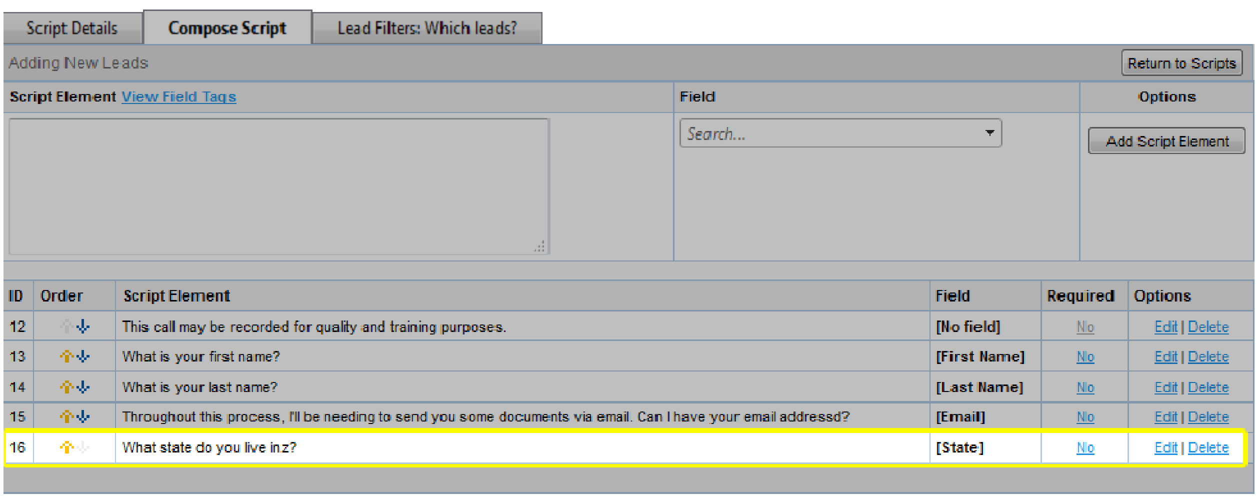
The bottom half of the **Compose Script** tab has the following functionalities:

- 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**

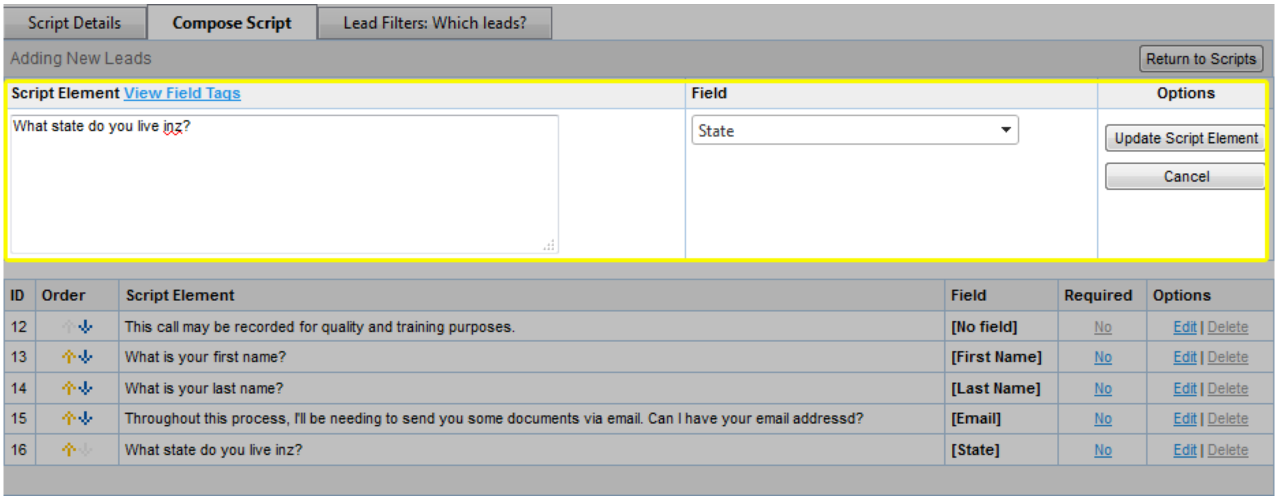
Editing a Script Element

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**.



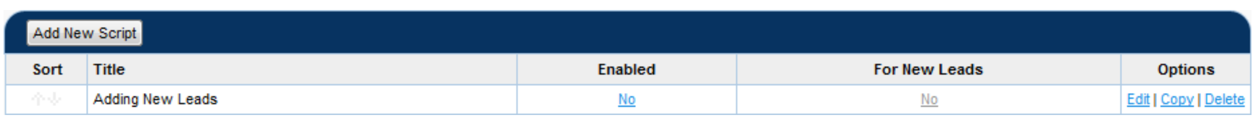
The **Script Element** will load in the top half of the form for editing.



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

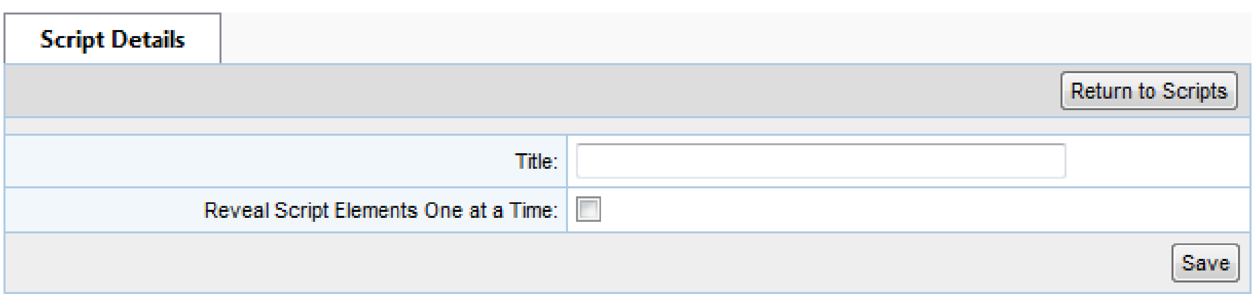
When the Script is complete, click the **Return to Scripts** button.

Creating a Script with Filters

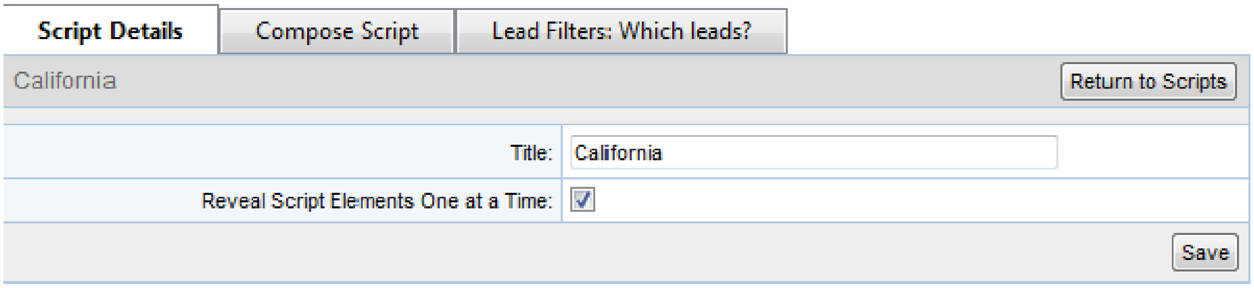


Click the **Add New Script** button to add a script.

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

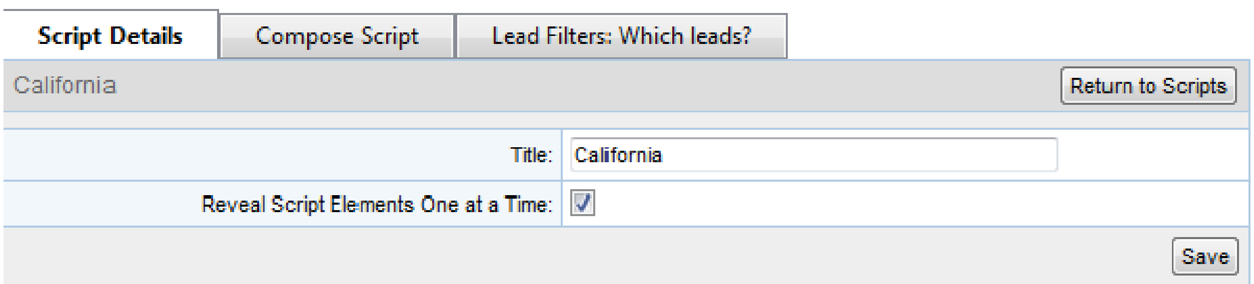


Give the script a **Title** and click the **Save** button.

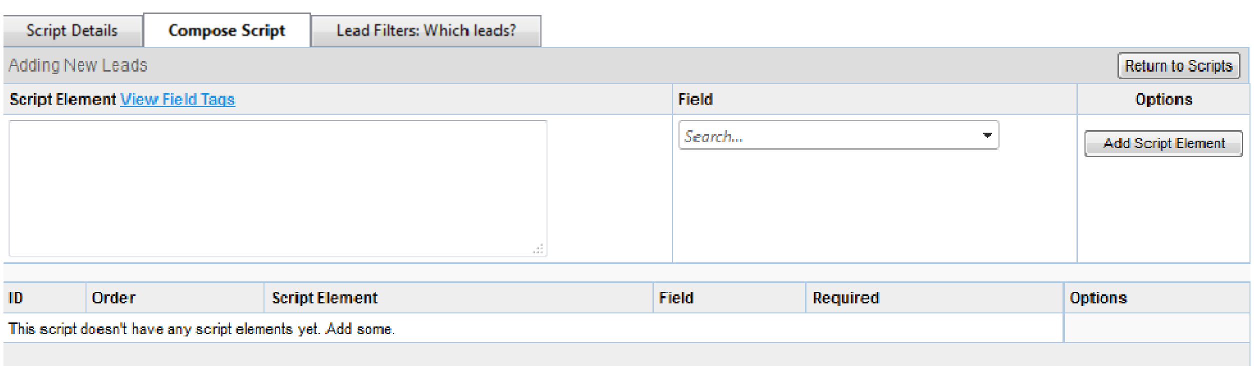


Reveal Script Elements One at a Time - Scripts are made up of a series of questions and/or statements. By default the full script will display to users. It will appear as a list of questions and statements. Clicking the **Reveal Script Elements One at a Time** checkbox will make it so questions and statements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

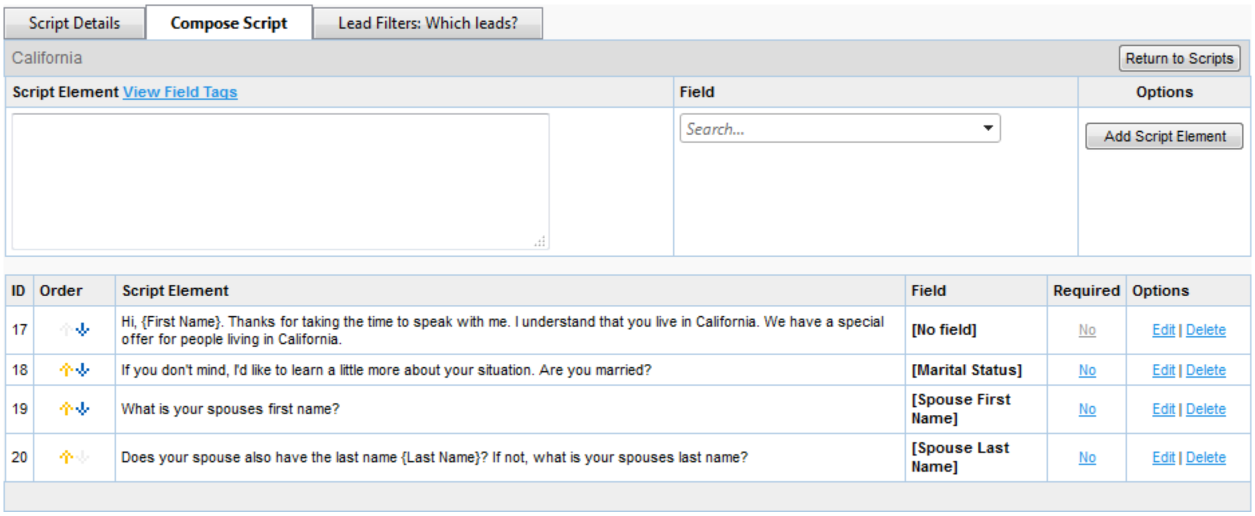


Click the **Compose Script** tab to compose the script. The Compose Script tab will load with no script elements.

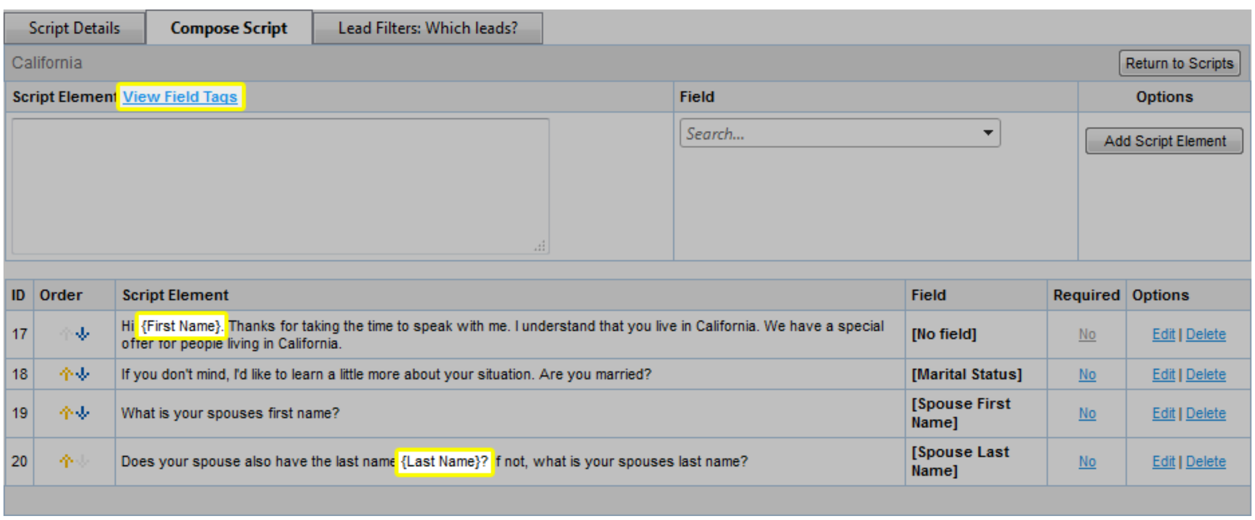


If necessary, review the steps above in the **Adding Script Elements** section of this document.

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



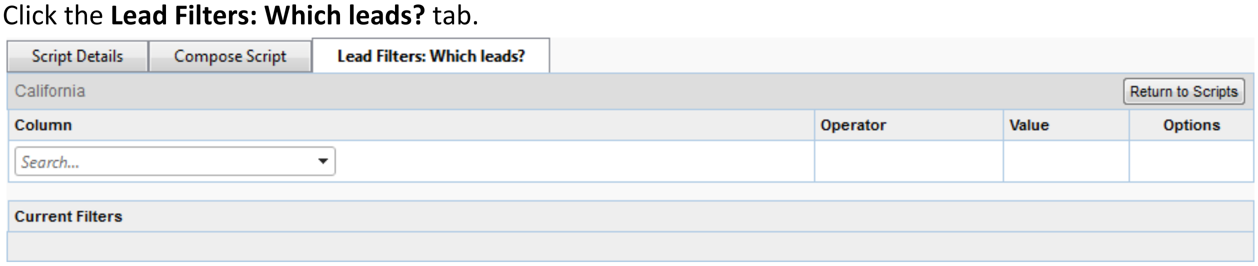
Note that two of the **Script Elements** in this script use field tags.



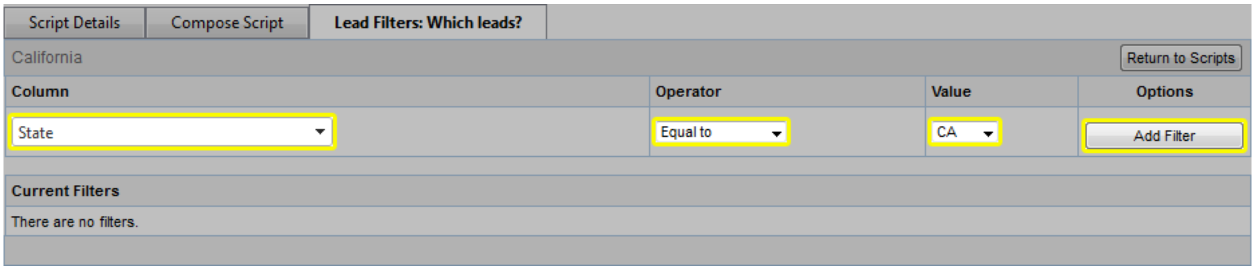
Adding Filters to a Script

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

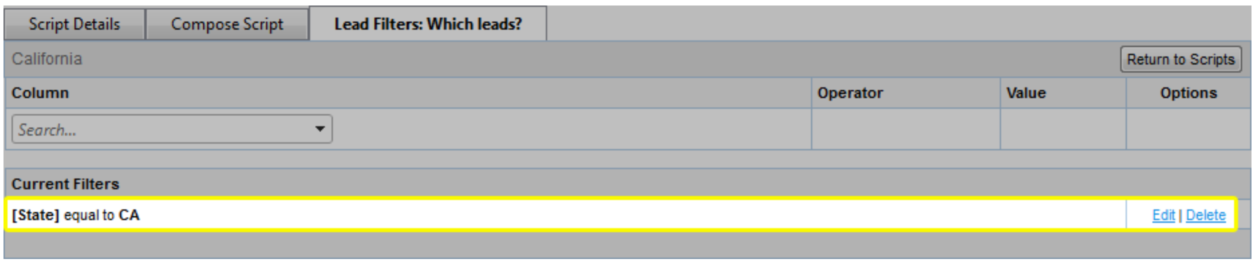
Click the **Lead Filters: Which leads?** tab.



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



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

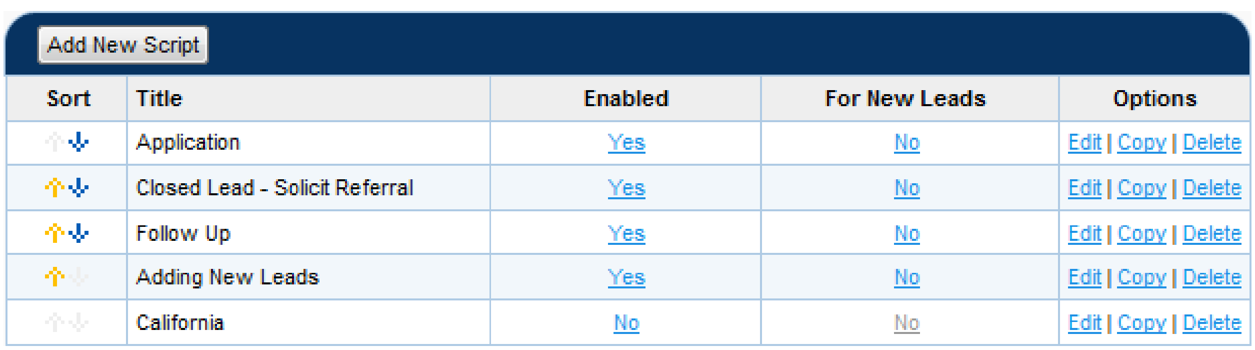


With this filter added this script can only be served to leads where the **State** value equals **CA**.

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	Yes	No	Edit | Copy | Delete
	Closed Lead - Solicit Referral	Yes	No	Edit | Copy | Delete
	Follow Up	Yes	No	Edit | Copy | Delete
	Adding New Leads	Yes	No	Edit | Copy | Delete
	California	No	No	Edit | Copy | Delete

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.

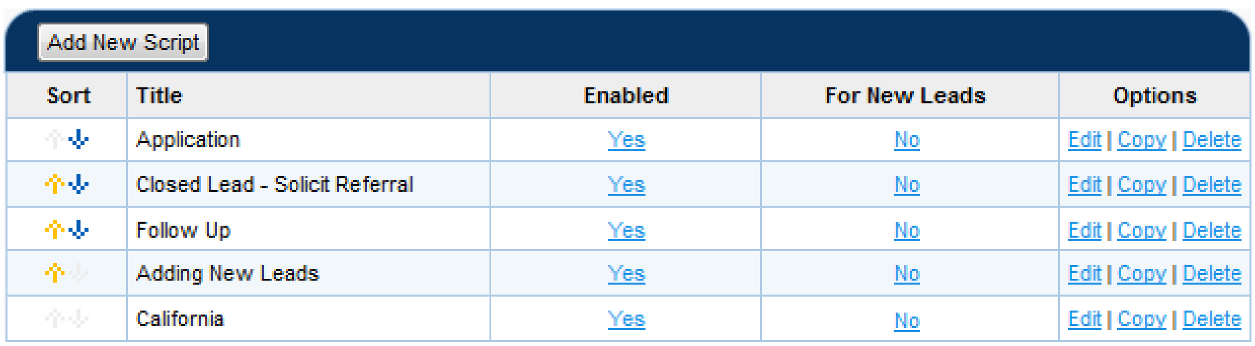
Enabled

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 an non-editable value of **No** in the **Enabled** column, it is because the script does not contain any **Script Elements**.

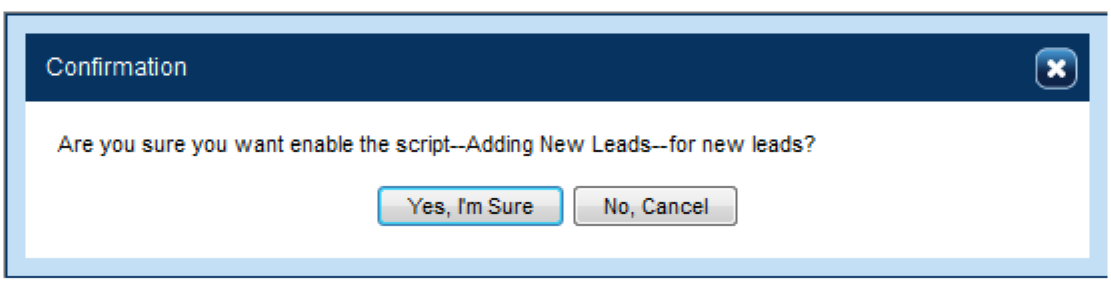
For New Leads

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.



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)	Yes	Yes	Edit | Copy | Delete
	Application	Yes	No	Edit | Copy | Delete
	Closed Lead - Solicit Referral	Yes	No	Edit | Copy | Delete
	Follow Up	Yes	No	Edit | Copy | Delete
	California	Yes	No	Edit | Copy | Delete

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

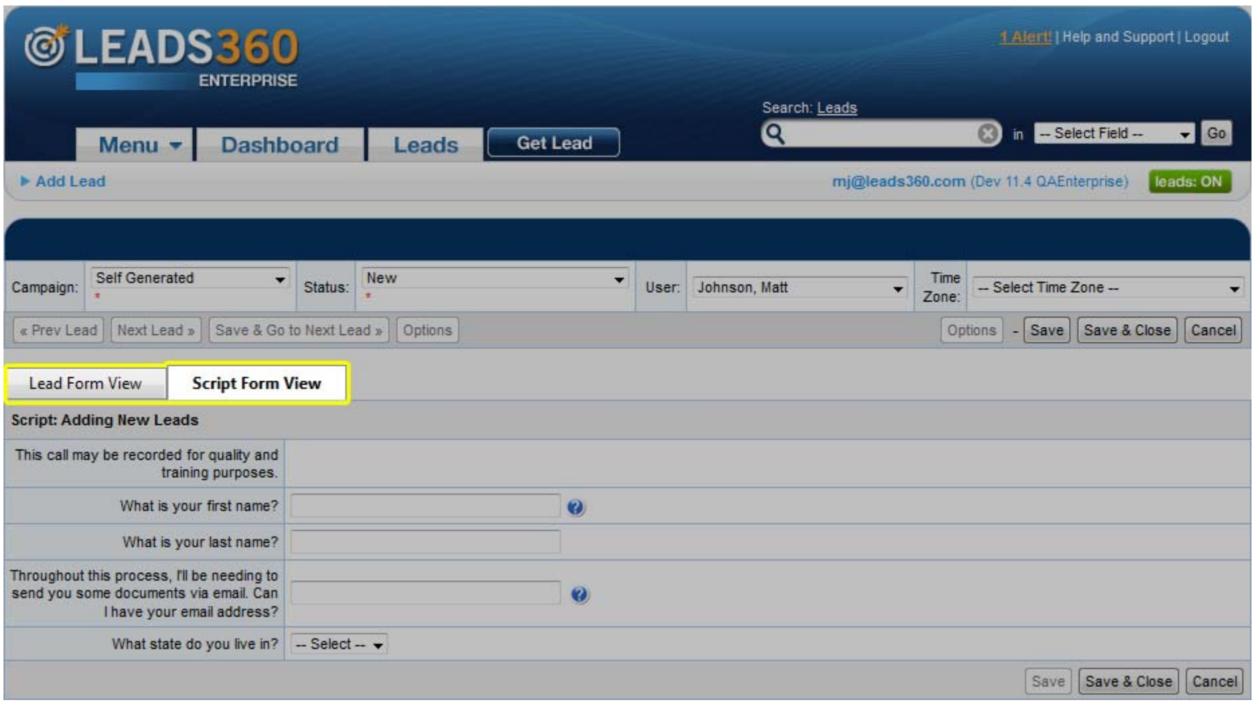
Users will see the scripting feature on the Add/Edit Lead page. A script is usually a subset of lead form fields with addition additional verbiage. An administrator can set for groups and/or users that the script view is visible and if it is the default view.

Settings

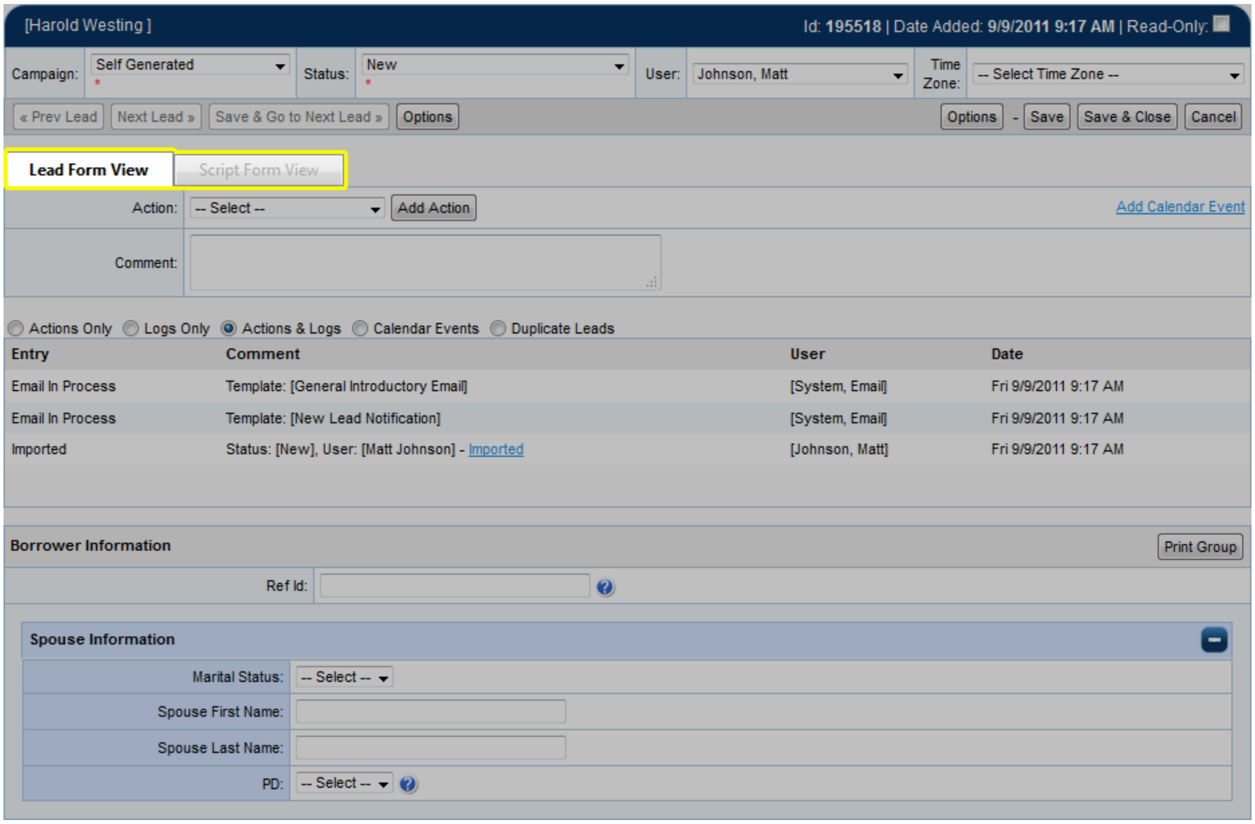
There are no user settings for the User Scripting feature.

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 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.



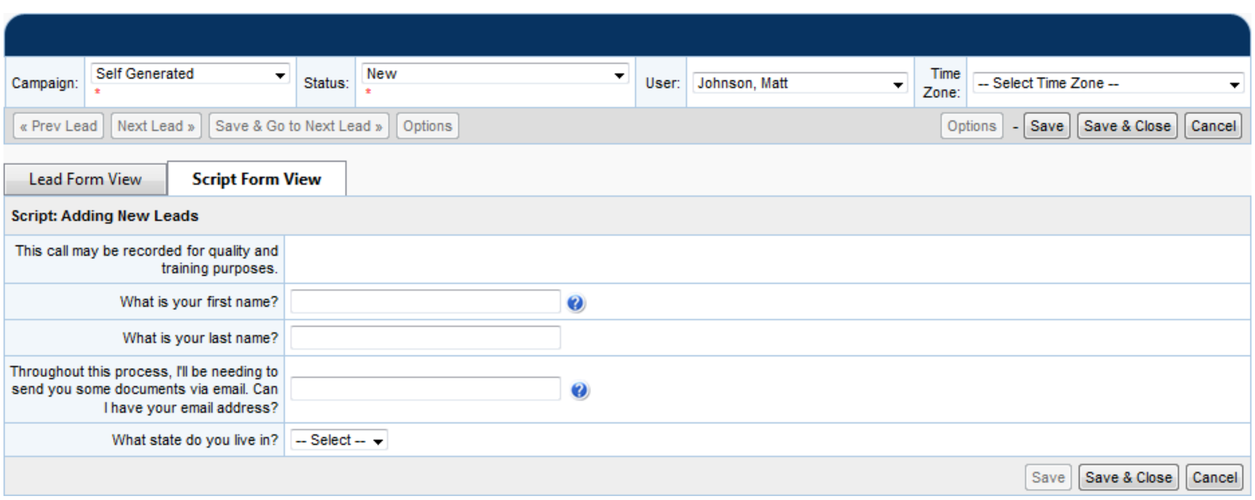
Using Script View on the Add/Edit Lead Page

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.

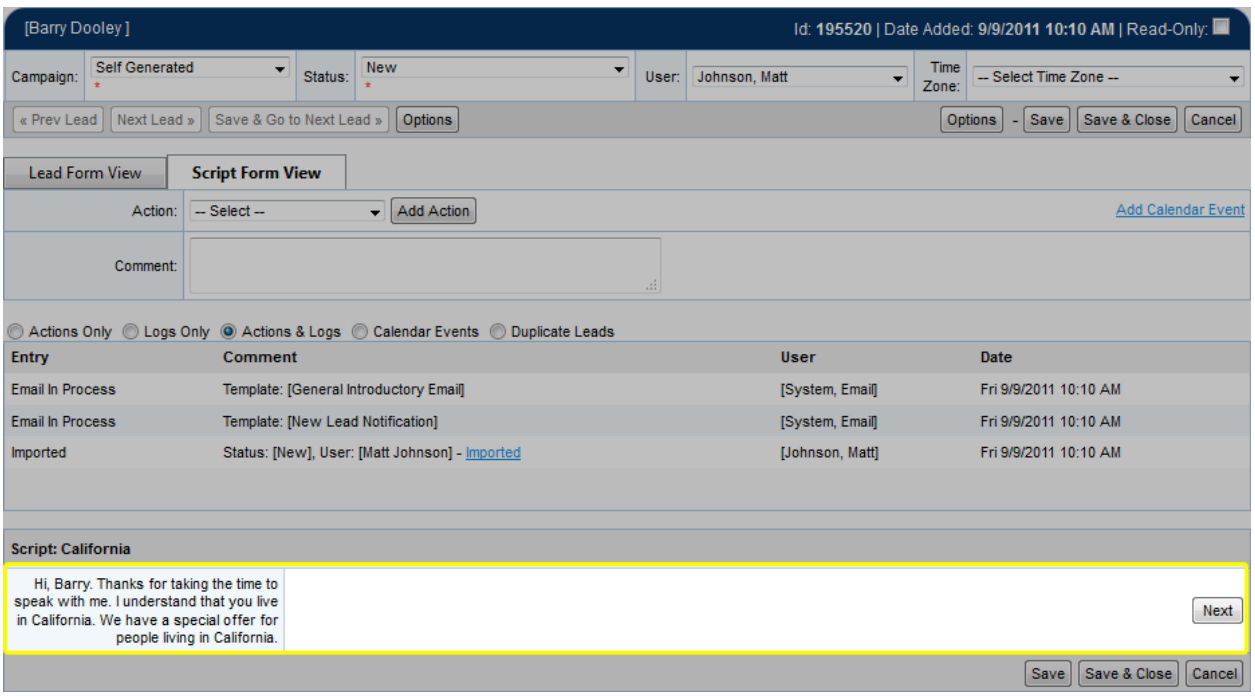


Working the lead from Script View consists of reading the questions and populating fields. It is recommended practice to answer the questions in order and not to save the script until all the questions have been answered. This is because the answer to one question can qualify the lead to be served a 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.

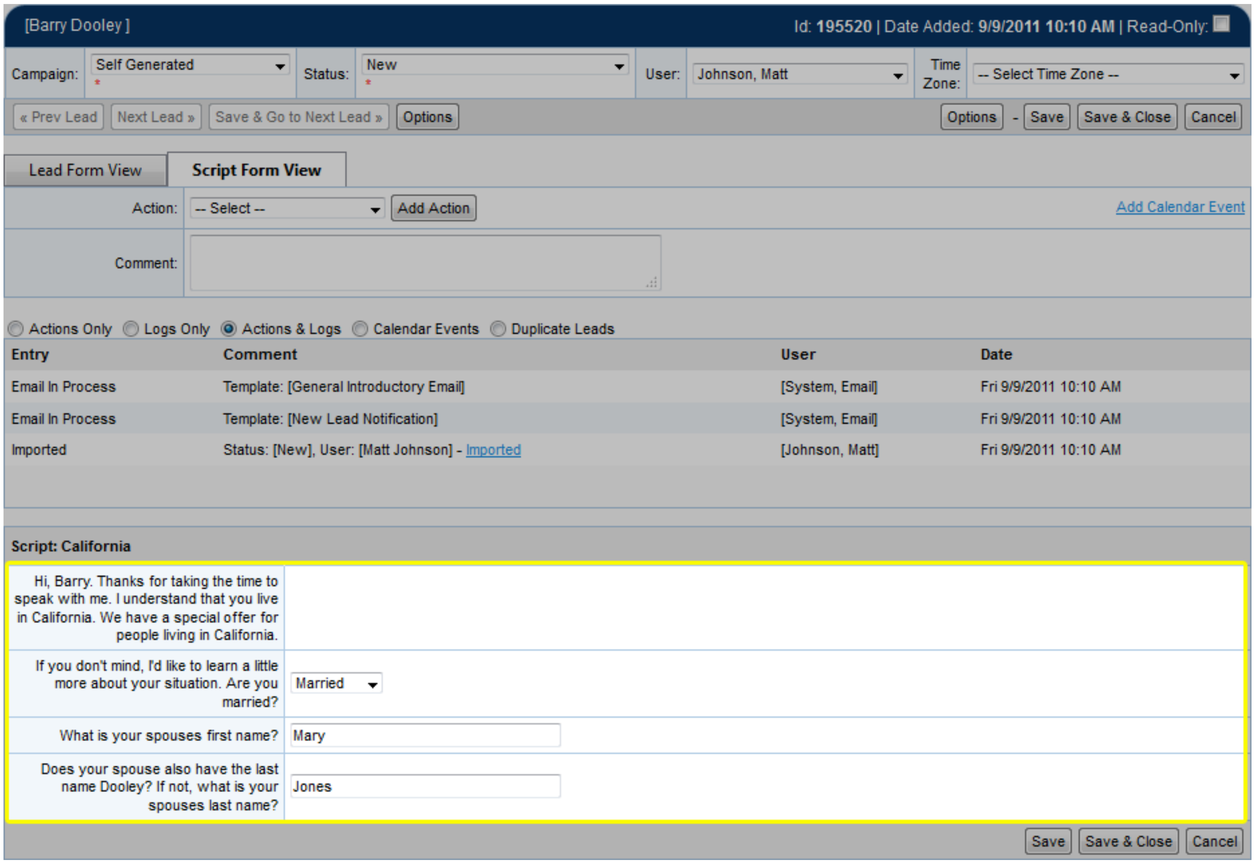
Once the script is saved the Actions/Logs section of the form will load. The workflow for taking actions on leads is the same when working leads in script view. Depending on the lead data a new script may appear. If no script is eligible to be served to the lead given the lead data, the **Add/Edit Lead**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



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.

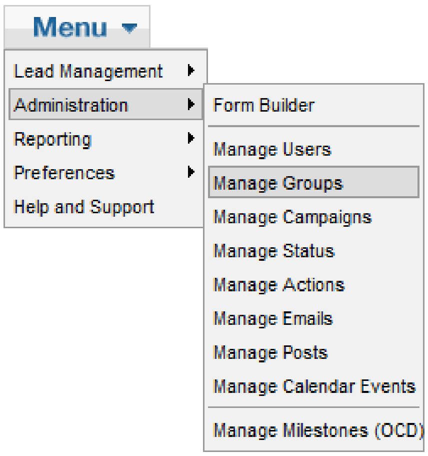


When the script is completed the script should be saved and an action should be taken as needed.

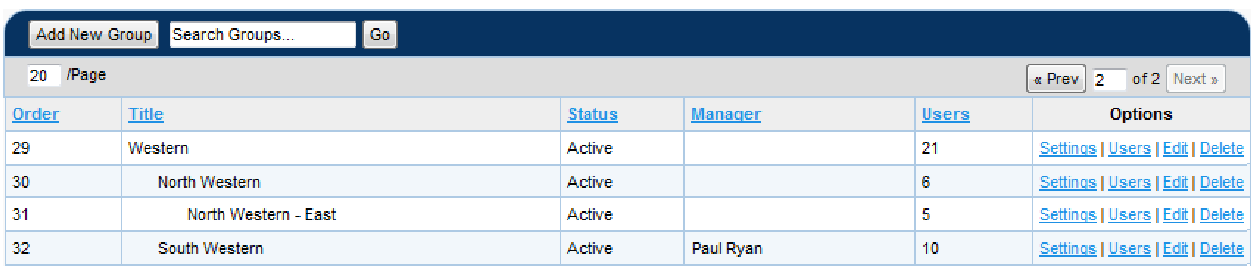
Multiple Managers per Group

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



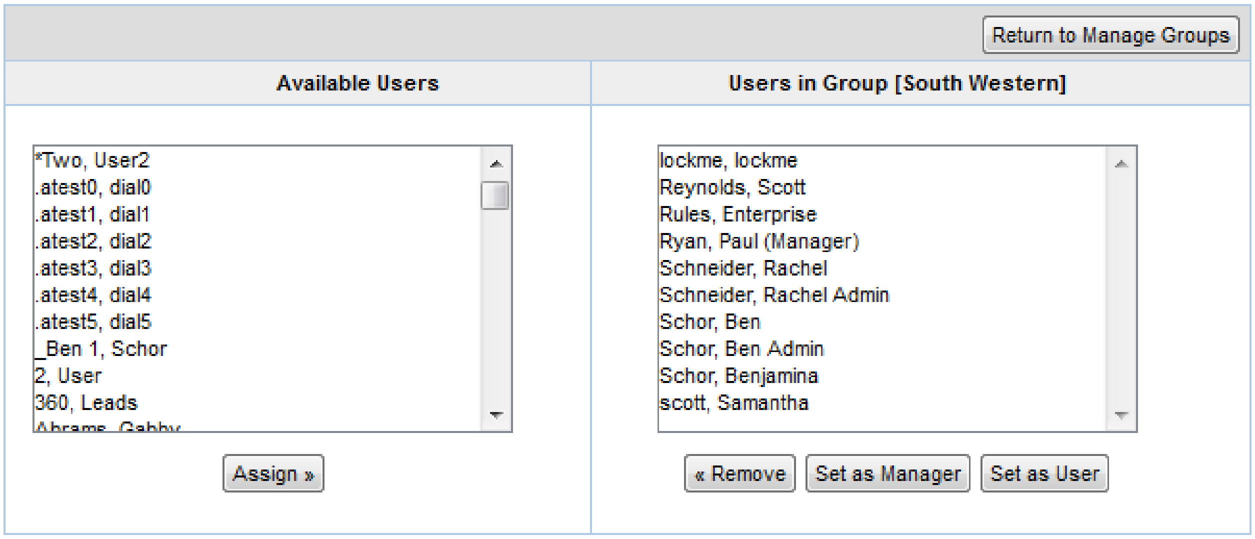
In the **Options** column click the **Users** link associated with the group you want to give multiple managers.



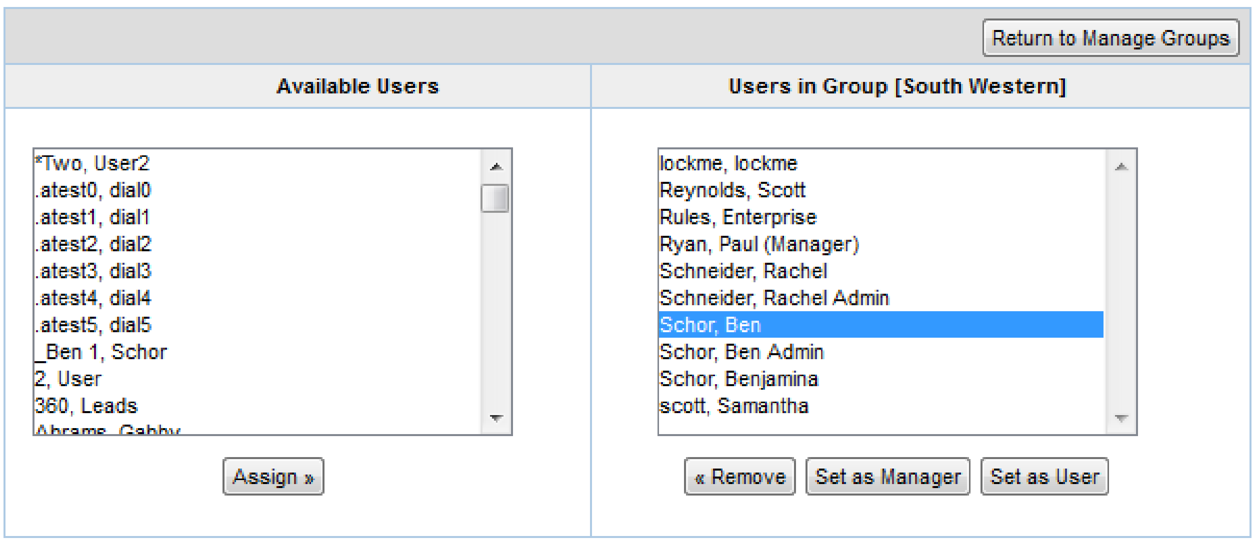
Order	Title	Status	Manager	Users	Options
29	Western	Active		21	Settings | Users | Edit | Delete
30	North Western	Active		6	Settings | Users | Edit | Delete
31	North Western - East	Active		5	Settings | Users | Edit | Delete
32	South Western	Active	Paul Ryan	10	Settings | Users | Edit | Delete

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

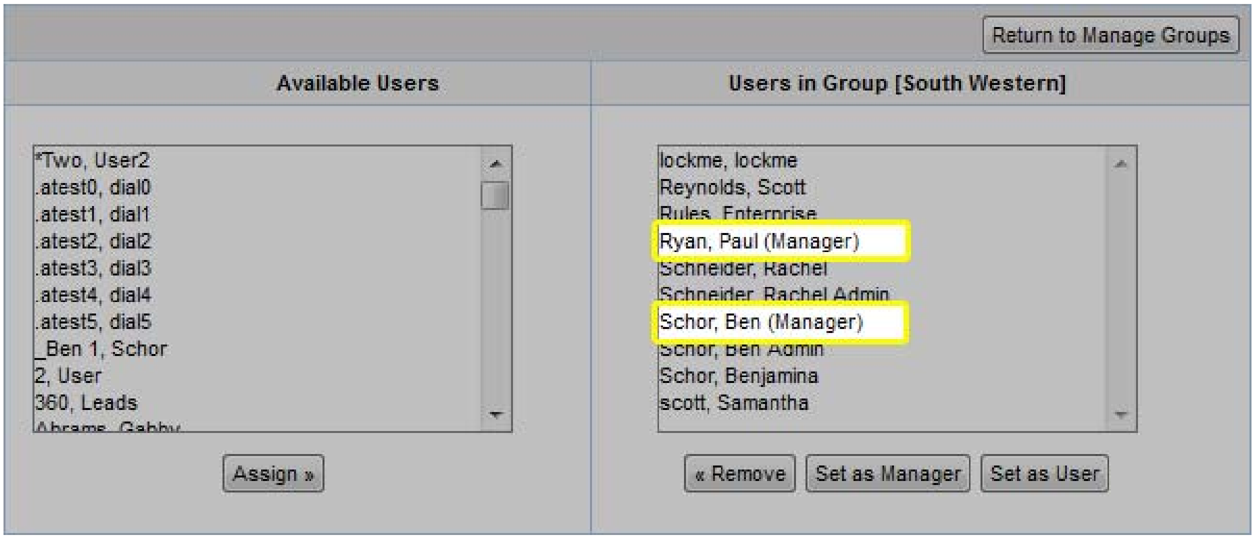
In this example, the **Group Manager** is **Ryan, Paul**.



Click to select the name of another Manager.

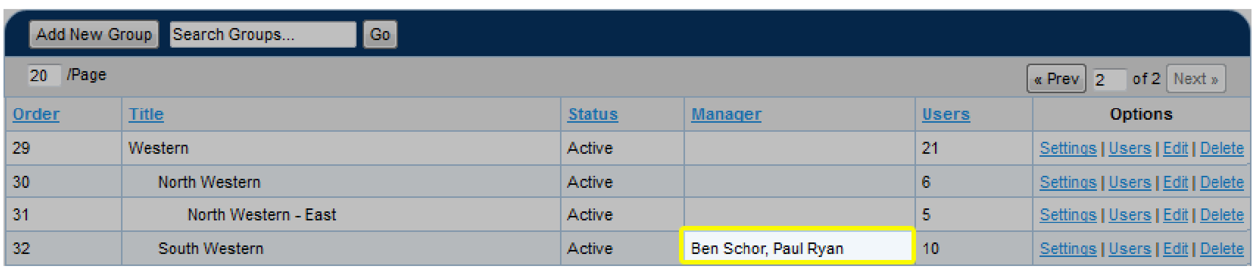


Click the **Set as Manager** button and both users will be Group Managers with full **Group Manager** privileges.



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.



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.

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) 333-1715	$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		New	Lisimba	Metzger		(347) 746-4178	(999) 500-5746	$802,000.00	FHA	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	$268,000.00	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) 628-4746	$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) 404-2547	(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		

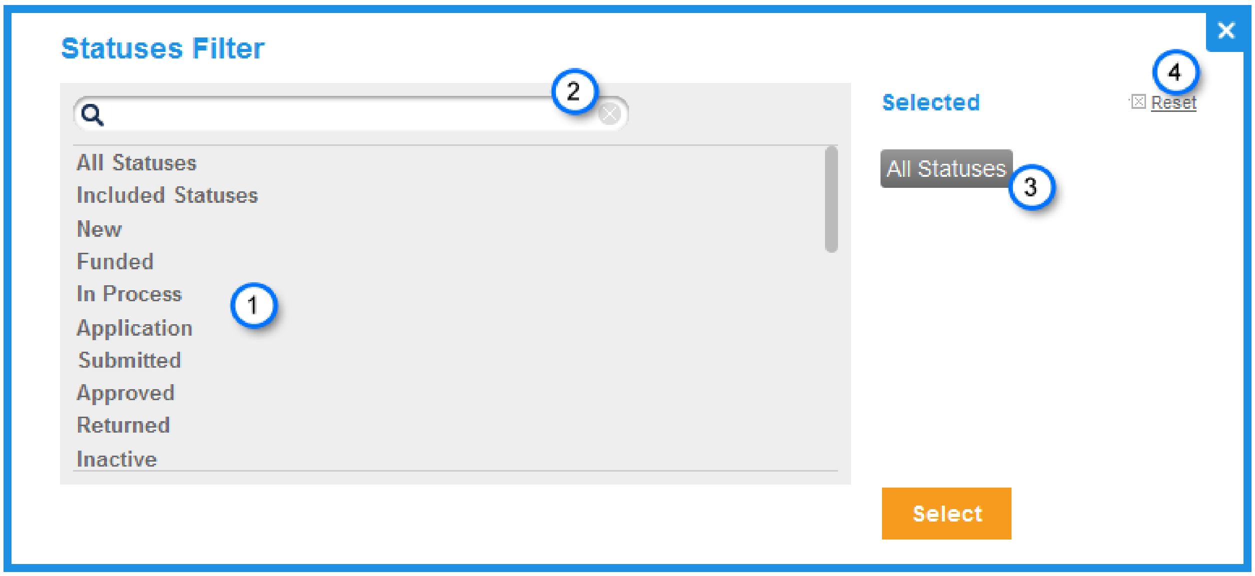
The filter bar displays what filters are currently applied to the leads. In the example above, the status filter has multiple items selected. As such, it displays: "**Included Statuses**" The Groups, Users, and Campaigns filters are all set to include **All**.

Setting Filters: Statuses, Groups, Users, Campaigns

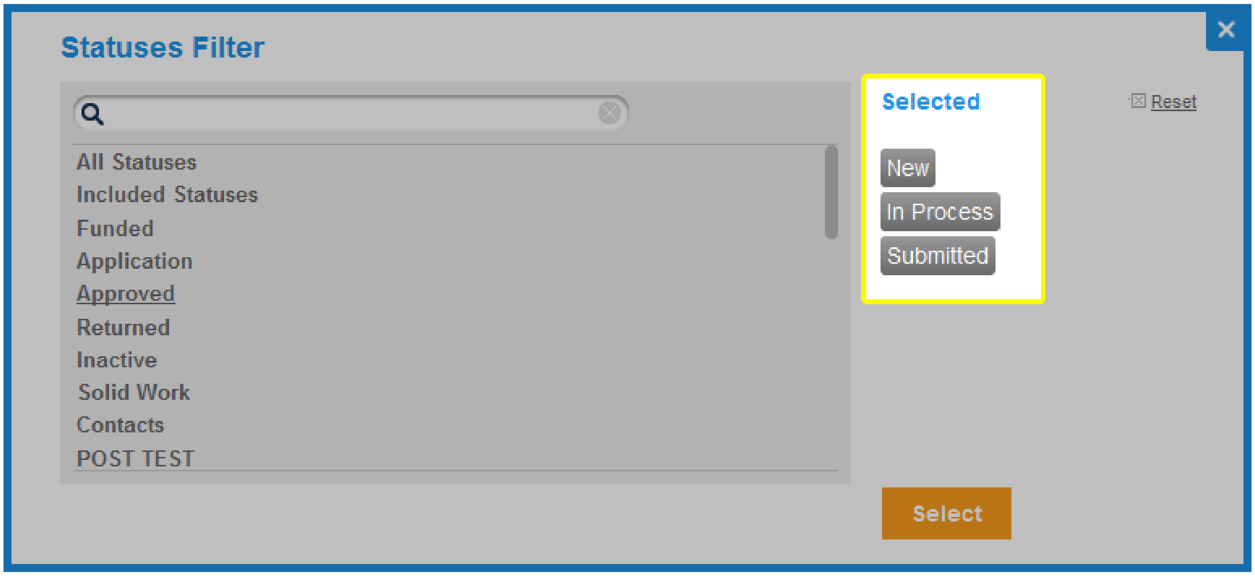
Setting filters on **Statuses**, **Groups**, **Users**, and **Campaigns** is done by the same process which will be demonstrated in the next series of steps. Setting a Date Range filter is done on a different interface, so it will be demonstrated separately.

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

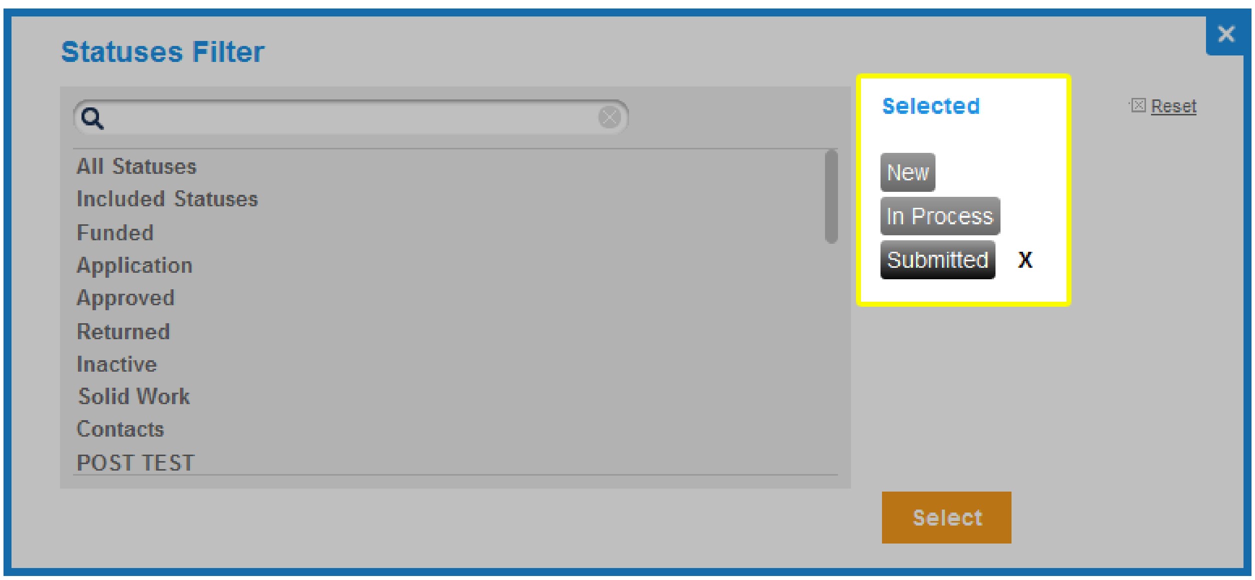
When clicking the **Status** link on the filter bar the popup loads as seen here



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

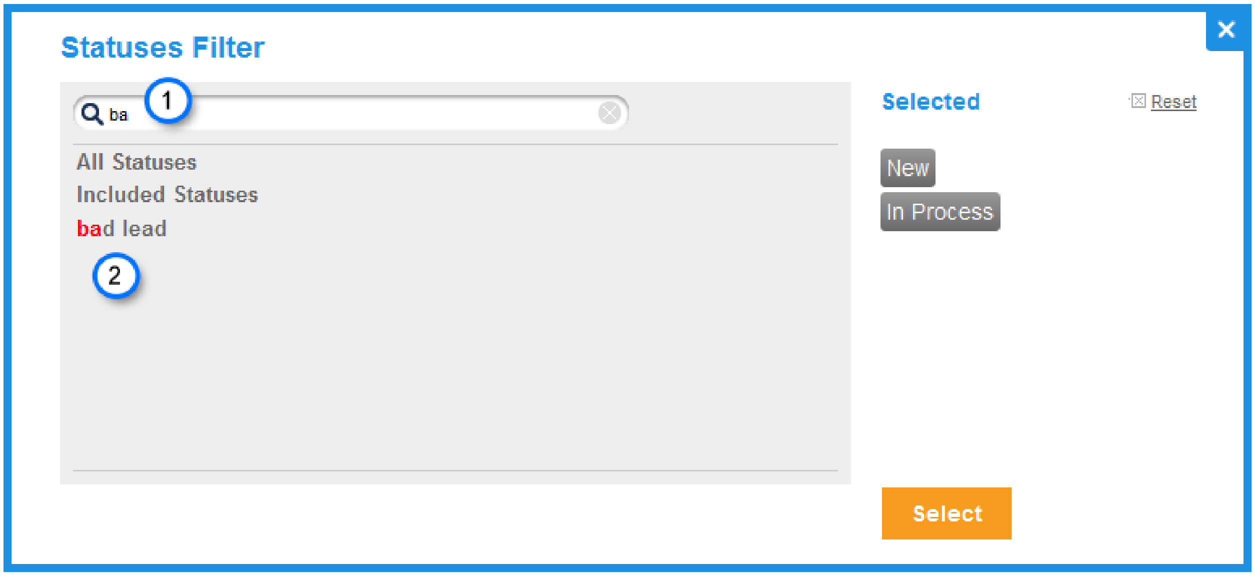


After clicking several statuses they appear here in the **Selected** list

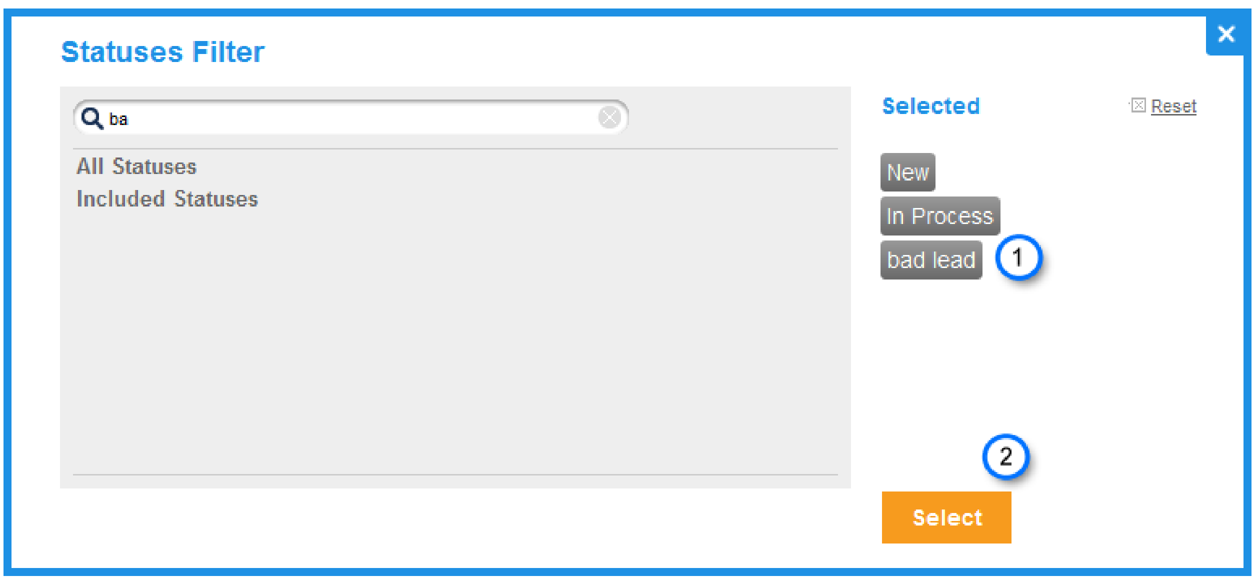


Mousing over a selected value reveals an X. Click the value to remove it from the list of selected values.

Using the Search field



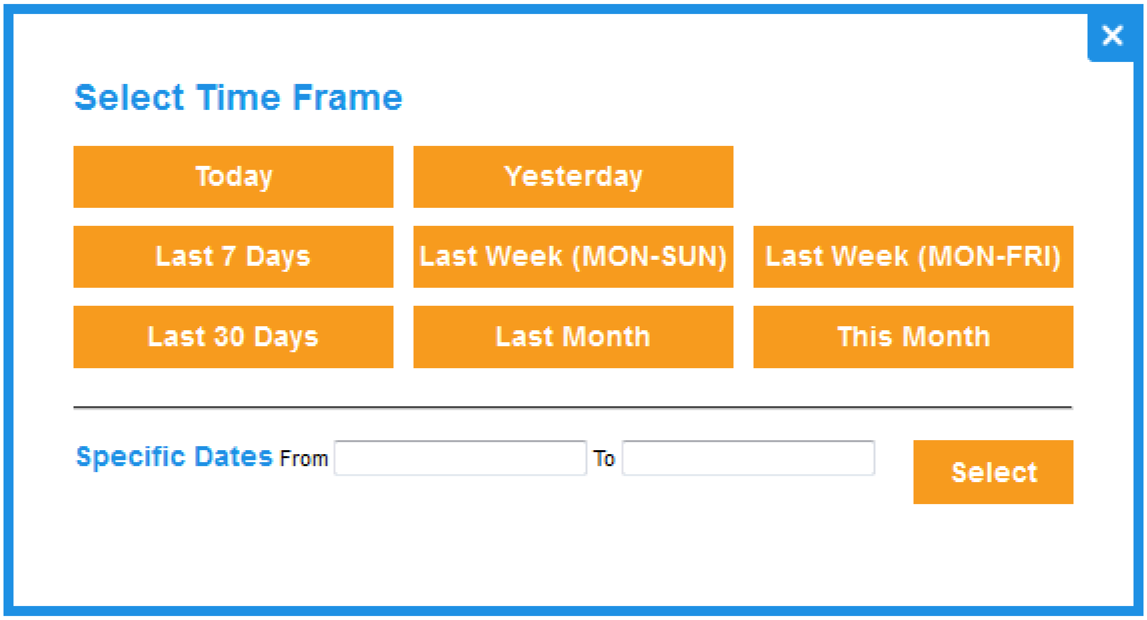
1. Find a value by typing in the search filed
2. Results are returned in real time based on the text appearing in the search field. Click the value to add it to the Selected column



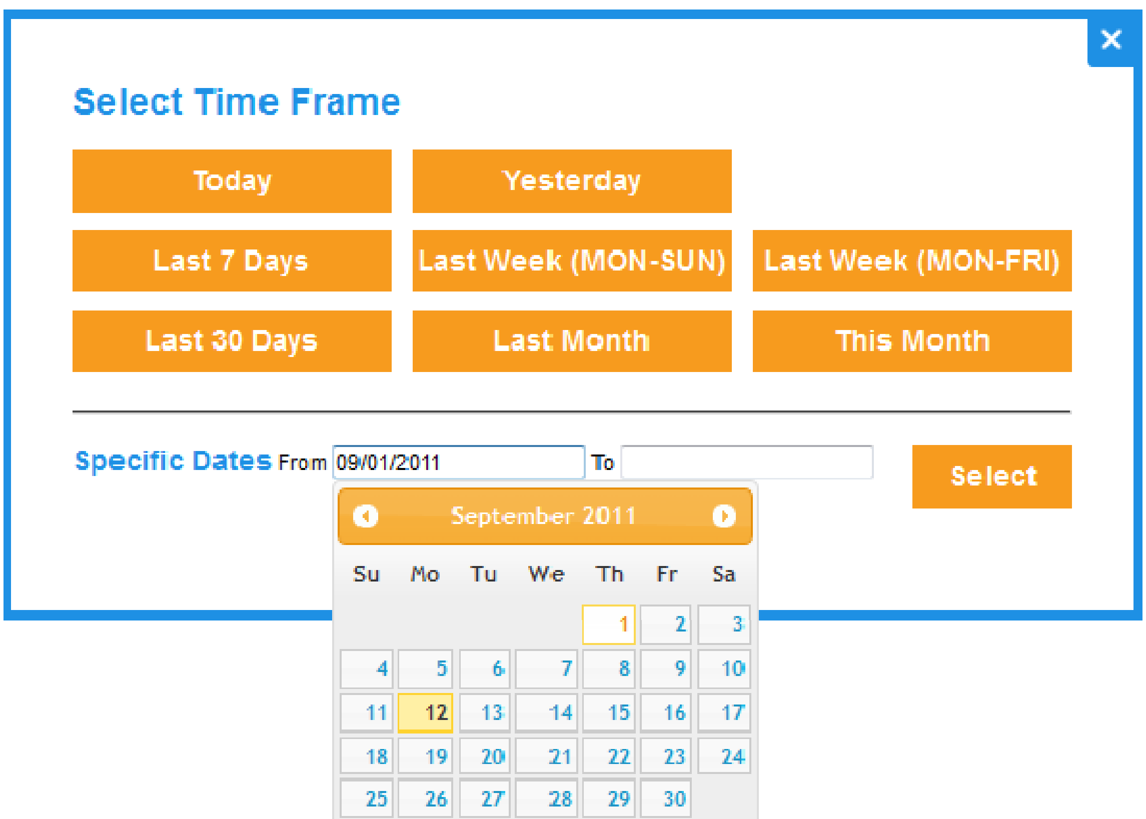
1. The desired set of statuses have been added to the **Selected** list
2. Click the select button to add the filter

Setting Filters: Time Frame

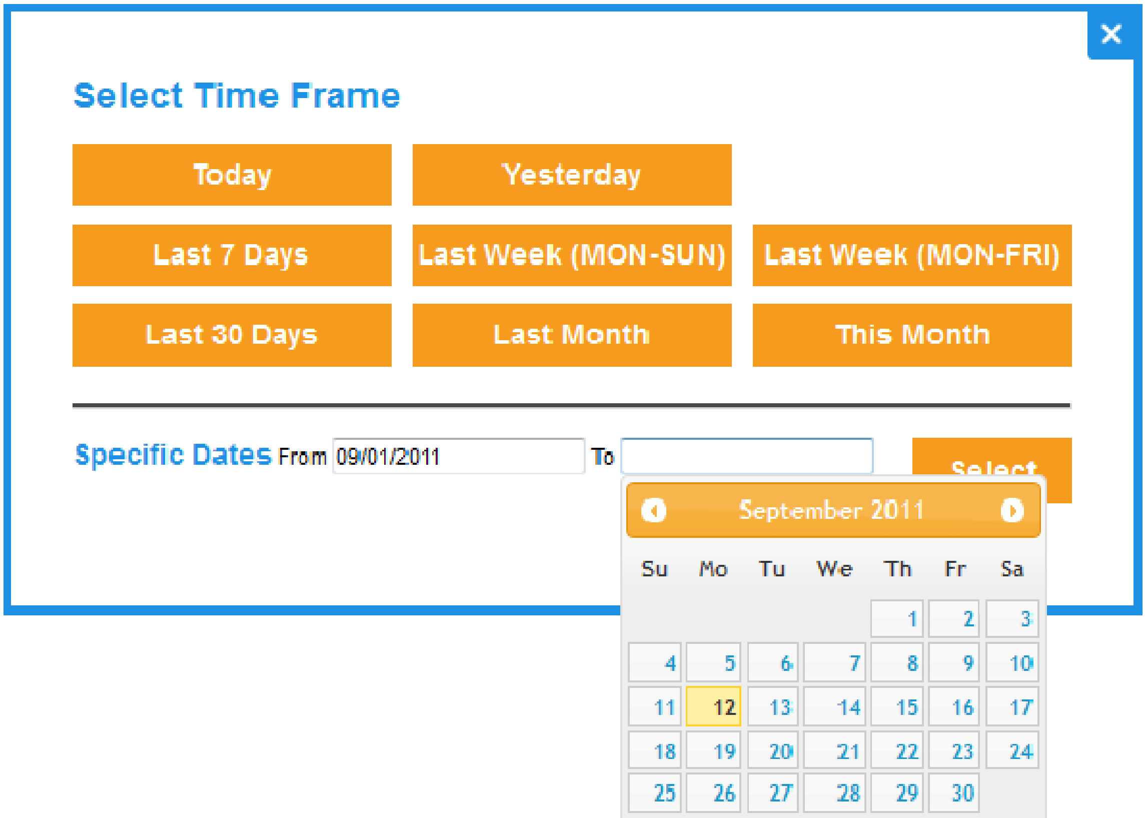
Click the date range in the filter bar to set the date range filter



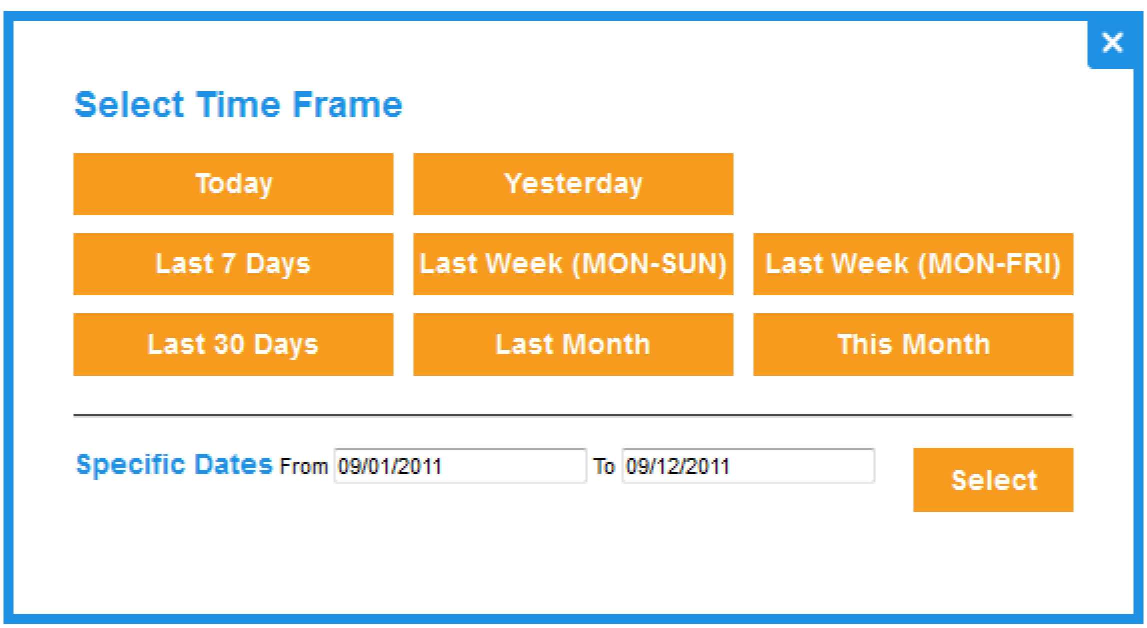
Clicking one of the preset date ranges will filter by that time frame.



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.

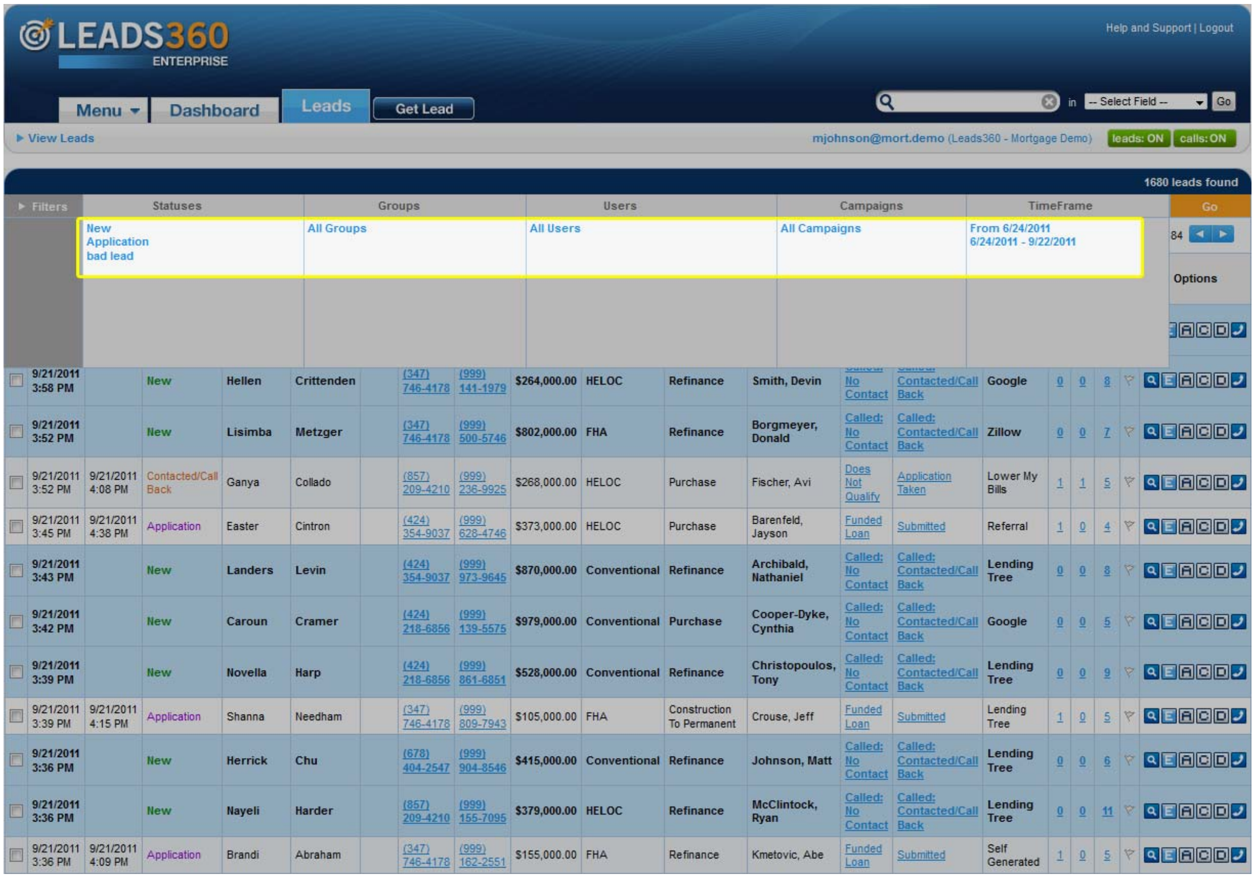


Click in the **To** field to set the end of the date range.



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

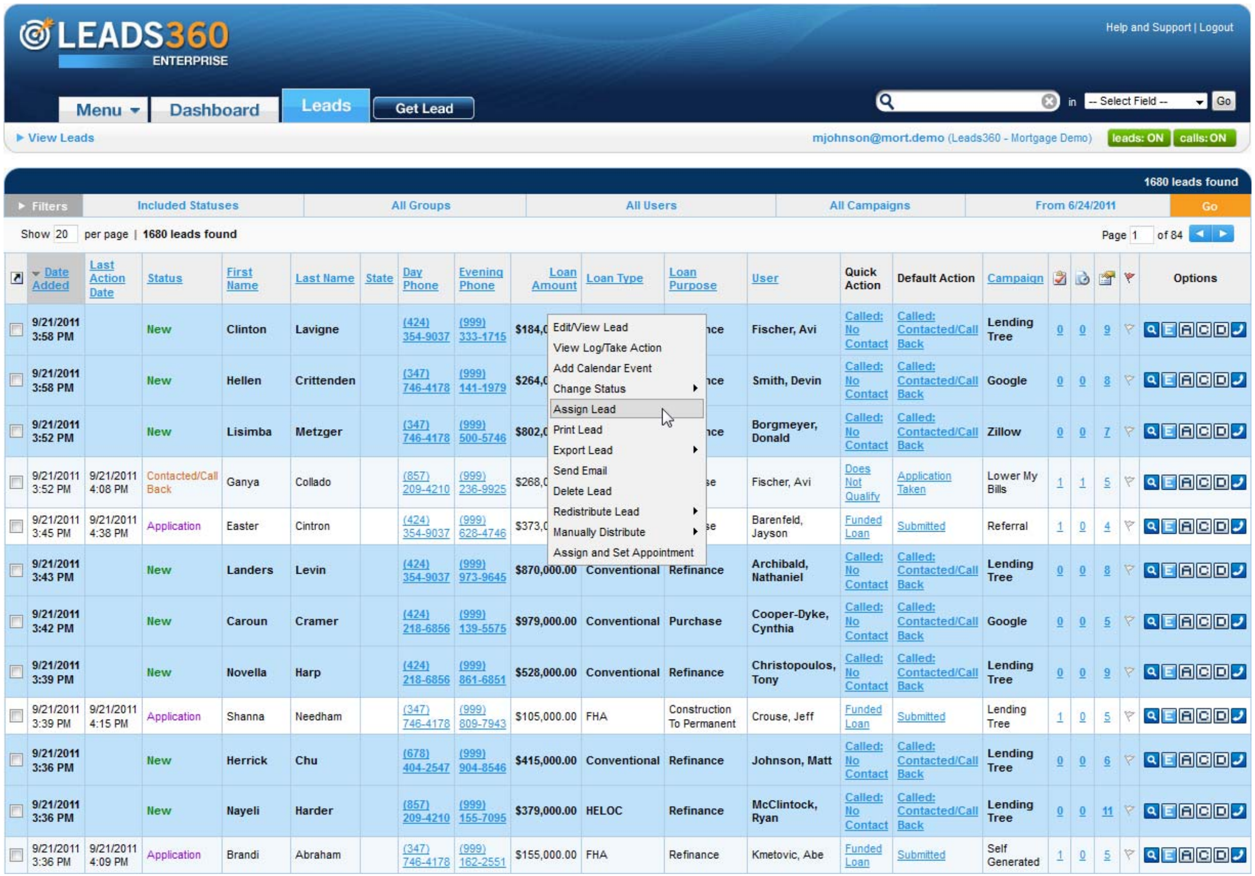
When the filters are set, they appear in the expanded filter bar.



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

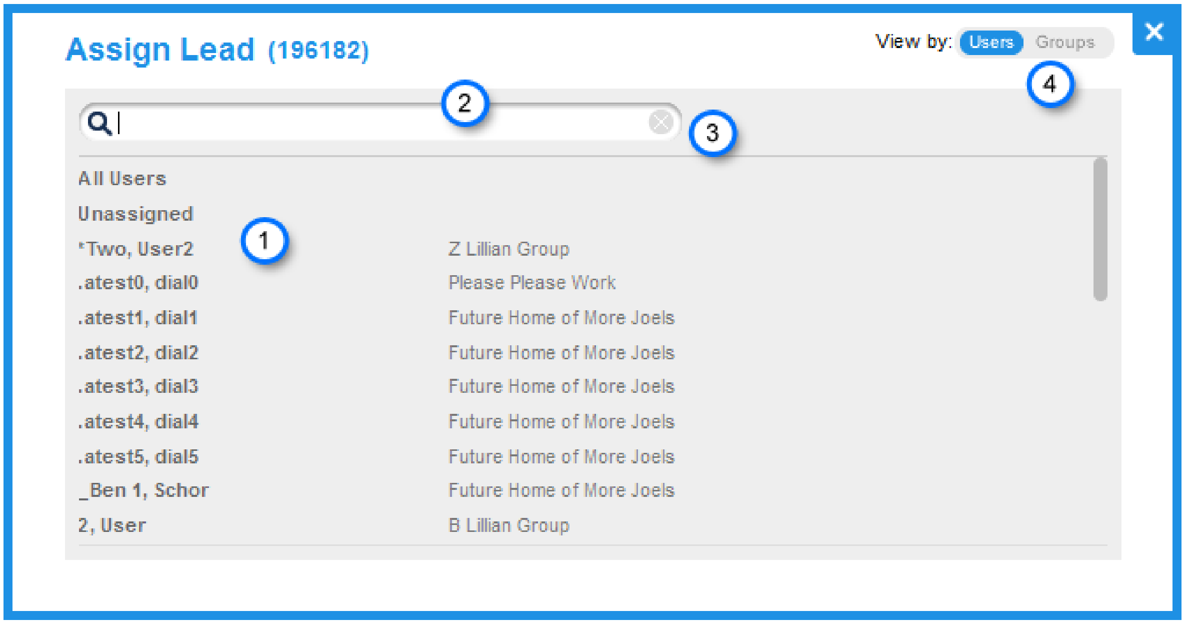
Assign Lead Interface

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**.



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**

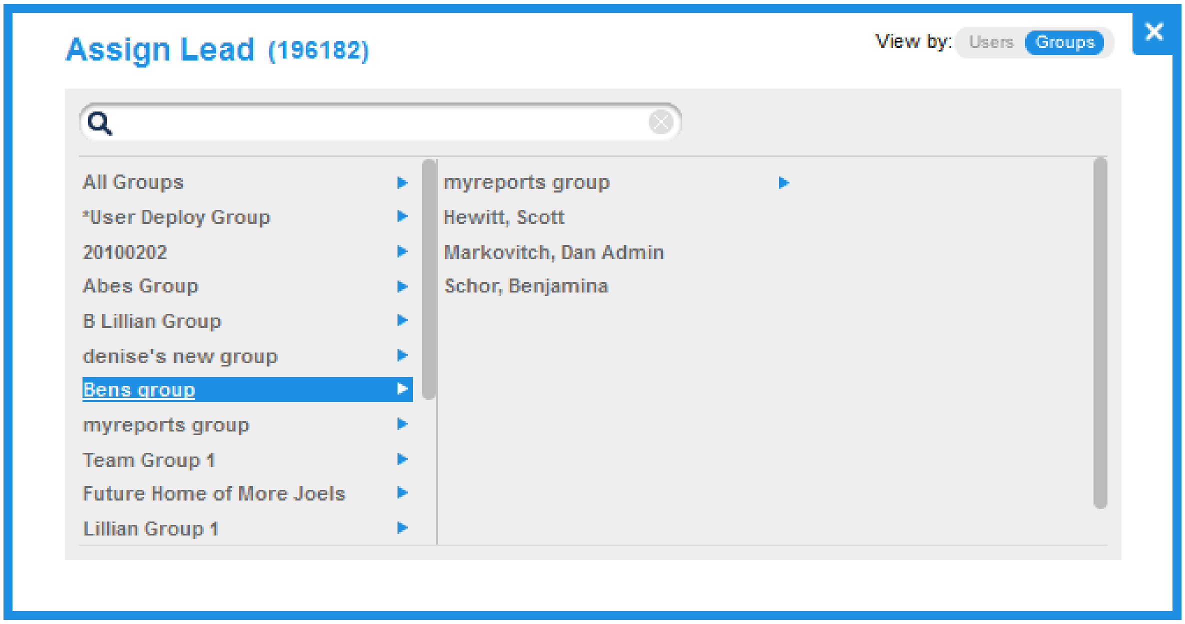
Lead Assignment Popup – User Search

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

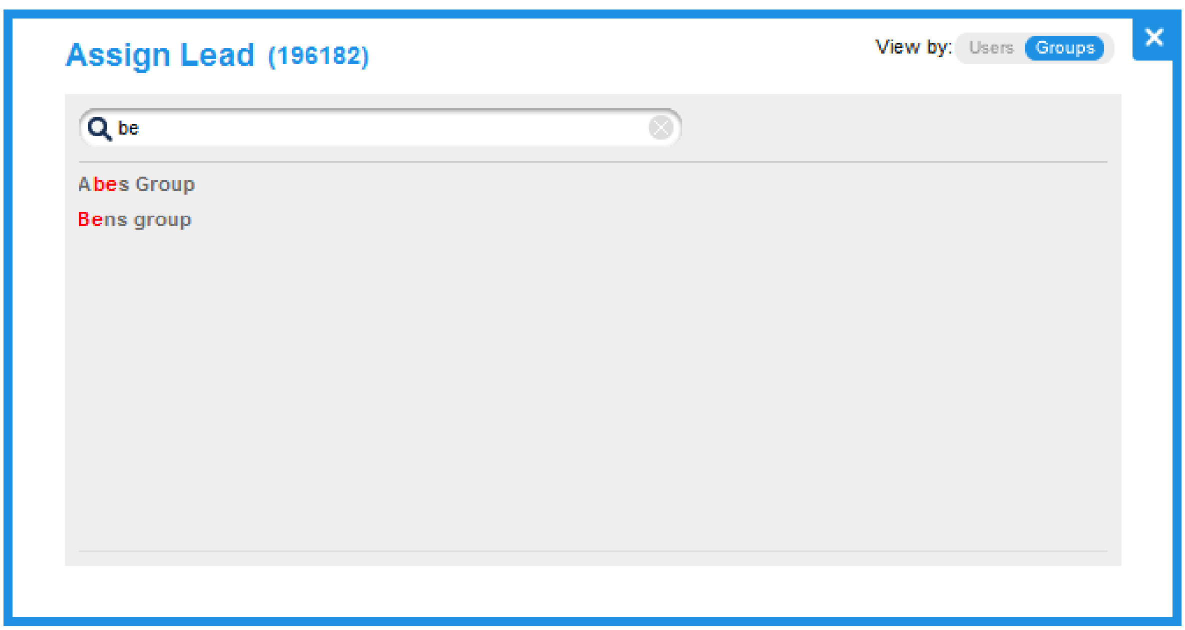
When the **Groups** button is selected the **Groups** are listed.

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.