Leads360 LeadManager Release Notes – June 2009

LeadManager Interface Updates
You'll notice some changes to the look and feel of the LeadManager interface. We've taken the opportunity to update the design and improve the user experience. **Don't panic!** While the design of the appearance of LeadManager has changed, the way you work your leads hasn't. Here's an overview of the changes.

Cross Browser Optimized
Finally the LeadManager is optimized for the following browsers:

- Internet Explorer 7
- Internet Explorer 8
- FireFox
- Google Chrome

Colors and Layout
We've changed the design and style elements within the LeadManager to provide a more consistent user experience. We've updated the screen layout and font to provide you with more viewing space to see lead information.

Navigation

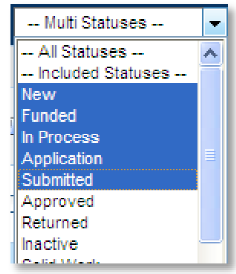

We've moved all navigation from the left-side menu to the new tabs at the top of each page to maximize your viewable content area.

1. **Menu Tab** – Contains all menu options that used to be in the left hand menu navigation
2. **Leads Tab** – Click here to see all your leads on the View Leads page
3. **Dashboard Tab** – Click here to go to your dashboard

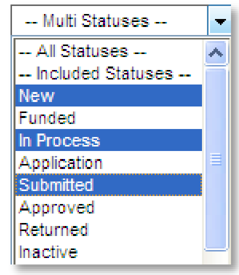
View Leads Page
In addition to new colors and layout, we've added some exciting new features to improve your efficiency!

Multi-Select Filters
Now you can filter your leads with multiple selections within each filter. The original filters only provided sorting by one user, group, campaign, and status at a time. Now you can select multiple options to further filter your leads.

Select multiple options by dragging your cursor within the filter dropdown (when selecting items which are next to each other in dropdown).

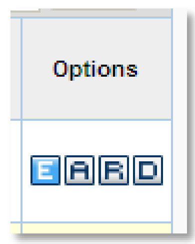


Select multiple options by using the Ctrl key (when selecting items which are separated in the dropdown).



Updated Options (E.A.R.D)
You'll notice that the Edit and Delete buttons under the options column have been replaced with four letter icons, E, A, R, D. We have updated the options to include the most common tasks you'll perform on the View Leads page.

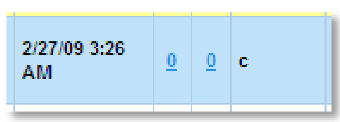
- **E** is for Edit – Click this button to edit a lead
- **A** is for Action – Click this button to take an action or view previous actions
- **R** is for Reminder – Click this button to set or view a reminder on a lead
- **D** is for Delete – Click this button to delete a lead



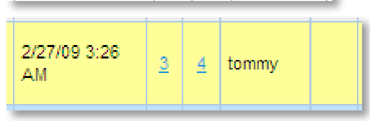
If you're ever unsure of the icons meaning, just mouse over it and a tool tip will be displayed.

New Highlight Colors
In keeping with the LeadManager's new style and colors, the lead highlight colors have been updated.

New leads are highlighted in blue

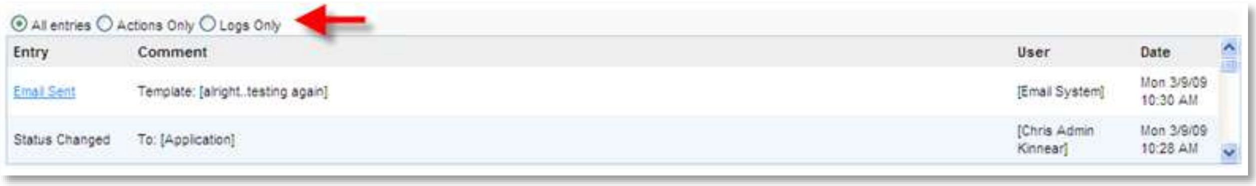


Flagged leads are highlighted in yellow



Edit Lead Page
The Edit Lead page has been updated to improve usability and efficiency.

Log Entry Window
The log entry window has been updated to allow you to filter by all entries, actions only or logs only. Just click the radio buttons to change your view.



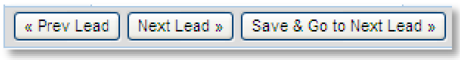
New Tab Layout

There's no longer any need to scroll to the right when viewing your tabs on the Edit lead page.

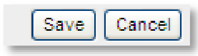
New and Updated Buttons

We've taken this opportunity to provide you with more efficient interactions on the Edit Lead page.

Save & Go to Next Lead – Click this button to save your updates before moving onto your next lead



Save – We've replaced the Apply button with a Save button. Clicking this button saves your updates but keeps you on the Edit Lead page



Save & Close – Click this button to Save and return to the View Leads page

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Email Updates

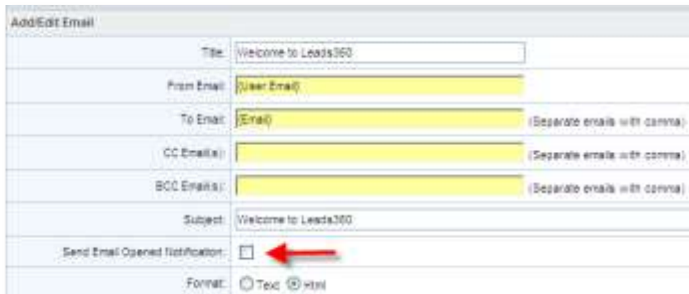
In addition to the design updates, we've also made some improvements to LeadManager email functionality.

Email Open Notifications Update

While the Email Open Notification has been valuable, it proved to be overwhelming as a global setting since it was triggered by every email template. Now you can activate this function for individual email templates, ensuring your focusing on your most important notifications.

This function is available as a check box on the Compose Email page.

Email Open Notification only works with HTML email templates and is disabled when you select the Text radio button.



User Email Validation

Leads360 continues to focus on providing excellent email services and reducing Spam complaints and bounce backs for our users. Some users employ dummy email addresses for user accounts which inadvertently increases bounce back rates when assignment and notification emails are sent to these addresses. In order to protect our users, we've introduced a new user email validation process.
Each time a new user is added to the system or a user's email address is updated, an email will be automatically sent to that address to confirm that the address is legitimate. Clicking a link within the email verifies that email address is indeed valid and may receive emails and notifications. Until the address is verified, no emails will be sent to that address (although the login and account will remain active).

You can view the status of a user's email address (Verified or Unverified) from the Manage Users page under the email status column.

Receiving Leads		Status	Email Status
Off	Enabled	Active	Verified
On	Enabled	Active	Unverified

If the status is Unverified, you may click the link to send a new verification email to the email address.

The user clicks on the link in the verification email to activate email notifications from the LeadManager.

Subject: Please confirm your email address with Leads360

Dear John

A Leads360 LeadManager user account has been created for you. In order to begin receiving new lead notifications and other important LeadManager emails you need to confirm your email address. Please click the link below to complete the email confirmation process.

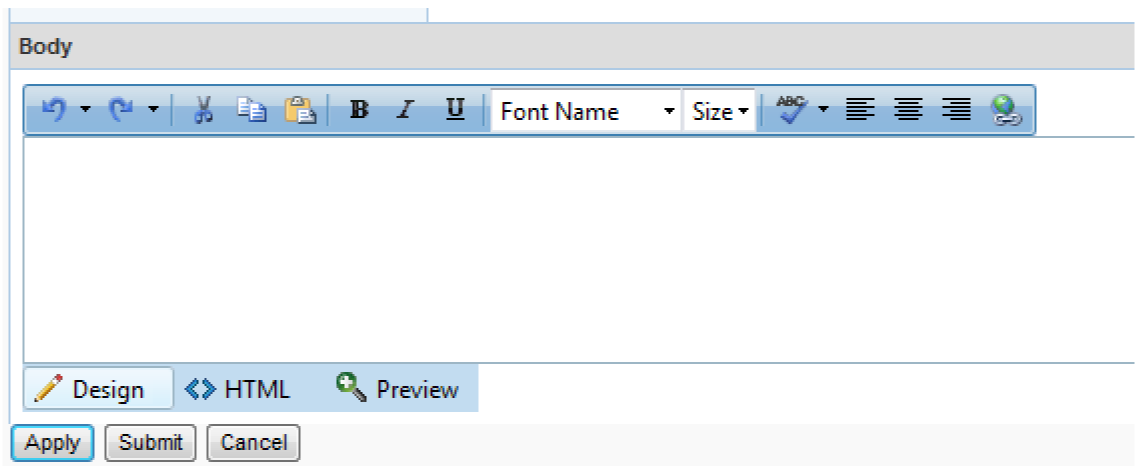
http://lm.leads360.com/Web/AgentEmailVerification.aspx?guid=1234

Sincerely,

Lead360, Inc.

New Email Editor

We've added a new email editor that is significantly easier to use. You can now edit in both HTML and Design mode and see a preview in full HTML.



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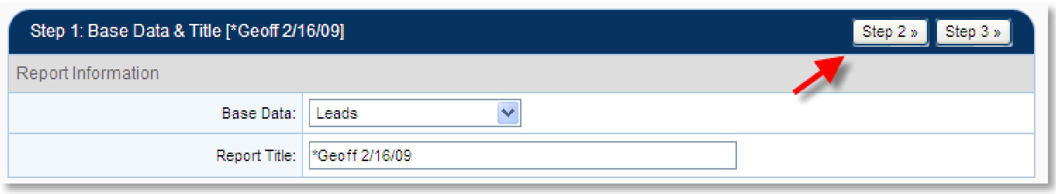
Reports Update

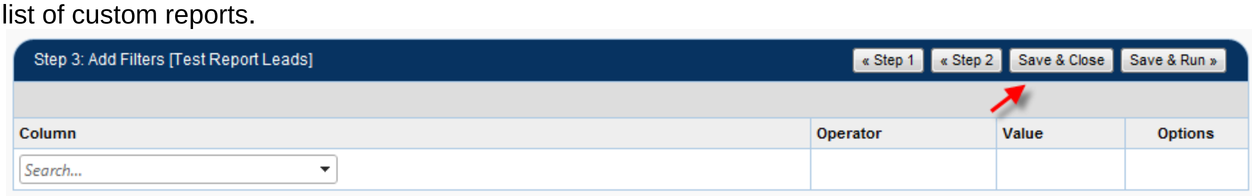
Based on your feedback, we've made small but significant changes to the reports interface making them much easier to use.

Editing Custom Reports

Now you can skip a step when editing custom reports. Just click the appropriate button to navigate between the 3 steps of building a custom report.

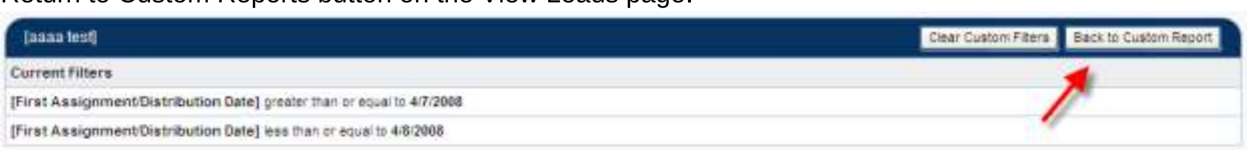


We have also re-named the "Save" button to "Save and Close" which saves the report and returns to the list of custom reports.



Manage These Leads/Back to Custom Report Function

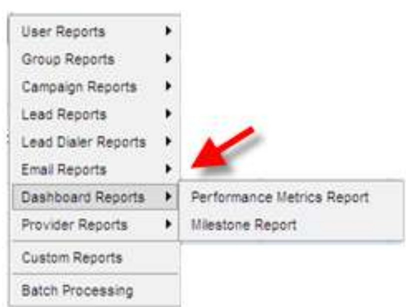
We've greatly improved the value of custom reports for lead management! Previously, using the Manage These Leads button within a custom report loaded the leads into the View Leads page, but didn't allow you to easily return to the report. Now, you can get right back into the original report by clicking the Return to Custom Reports button on the View Leads page.



Performance Metrics and Milestones Reports

The same Performance and Milestone metrics available on the dashboard have been added to the Reports menu where they may be exported to Excel.

To access these reports, click the Menu tab → Dashboard Reports and select Performance Metrics report or Milestone Report.

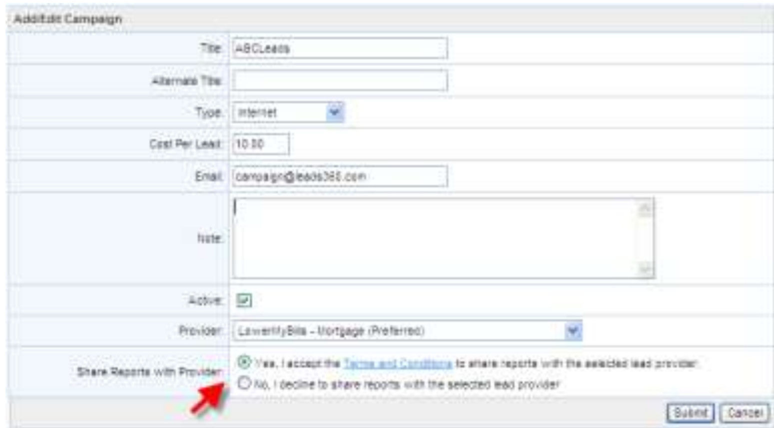


Provider Reports

You can now choose to share lead metrics and milestone metrics for a campaign with the respective lead provider. If you choose to share this data, a weekly email with the metric reports will be sent to the respective provider. The data emailed to providers will also be available to you in Lead Metrics and Milestone Metrics available in Provider Reports section.

To share the metrics for a new campaign, click the Menu tab → Administration and select Manage Campaigns. Click Add New Campaign.

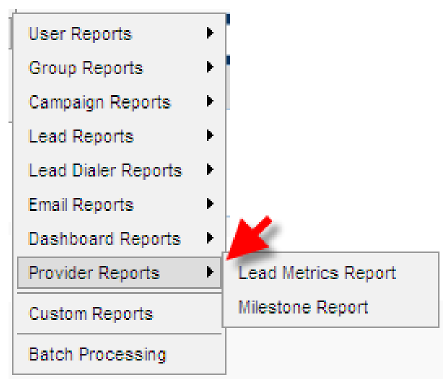
In Add/Edit Campaign page, select the provider. Only if Leads360 has an agreement with the provider, you will see two options to share reports with the provider.



The share report selection made for one campaign will automatically apply to all campaigns with the same lead provider.

To change the share reports selection for an existing campaign click Edit

To access these reports, click the Menu tab → Provider Reports and select Lead Metrics report or Milestone Report.



Distribution Log Report

In addition to the custom and canned report updates, the distribution logs (available within the Lead Distribution page) have been updated to support export to text and Excel files. You'll also notice a new Program column to indicate which distribution logs you're viewing.