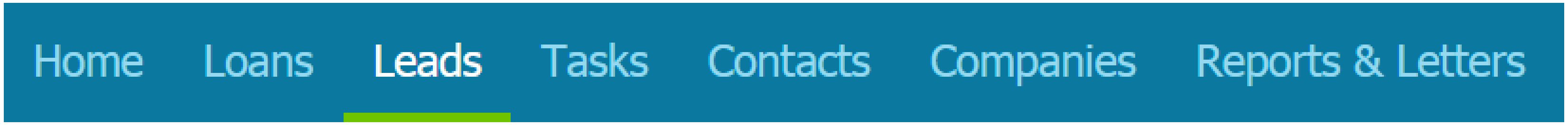
VENTURES LENDING TECHNOLOGIES

Leads module

Overview



The **Leads** module was created for organizations that want to:

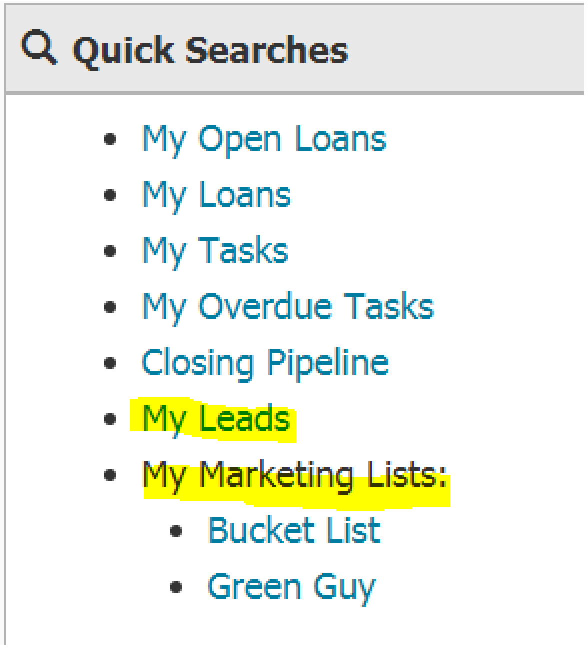
- Track potential leads (prospective loan, personnel, referrals);
- Have a better management of Contacts by adding/editing Role types;
- Record Notes / Tasks against Contacts; and
- Create/Manage marketing lists and exporting the data for integration with vendors such as mailchimp

The following pages will highlight some useful tools included with this module.

Home Page

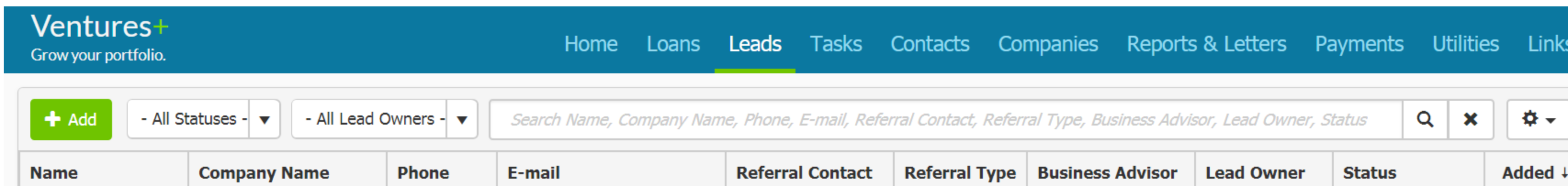
Once the module is activated the following become active on the Home page **Quick Searches** widget:

- **My Leads** hyperlink to direct LO/BDO's to the **Leads** tab and display list of Leads they've created
- **My Marketing Lists** *may* appear if your organization has set up Lists for marketing purposes via the Administration menu



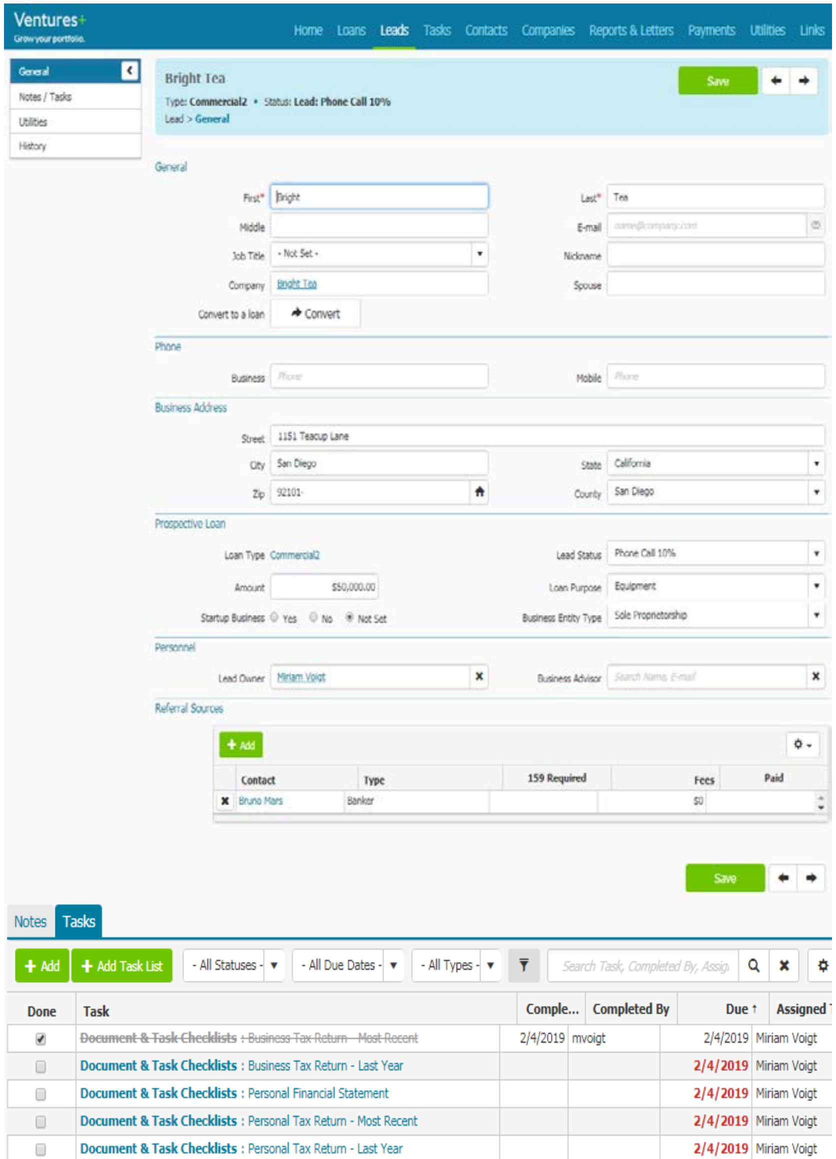
Leads tab

The **Leads** tab will display all Leads created. If accessing the tab from the Home page hyperlink, the table will be filtered for the LO/BDO and only show his/her contacts.



- Sub-status' for this module are user-defined within the **Administration** menu
- To create a **Lead** click on the **Add** button
- Only 3 fields are required to create a Lead: First Name, Last Name & Loan Type

Leads page



After the Lead has been created there are some fields for data entry such as:

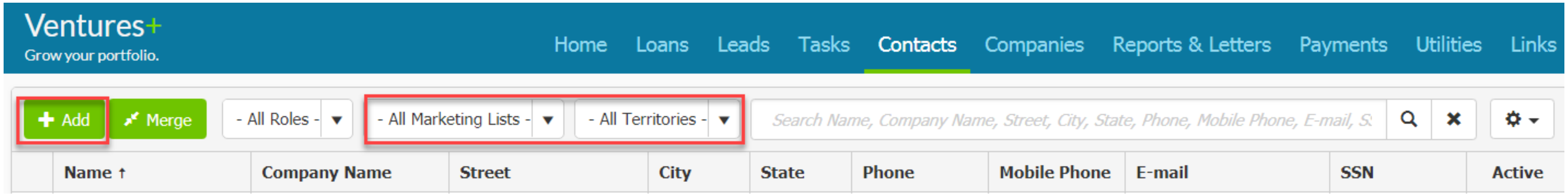
- **Business Address**
- **Amount** of loan
- **Lead Status** – *very important*
- **Referral Sources**

When the Lead is ready to become a Loan click on the **Convert** button to transfer the Lead to your Loans table.

Tips:

- Use **Notes** to track Lead specific *weekly* notes. Create a pipeline report against the Note Type for efficient pipeline meetings.
- Use **Task List** to add Lead related checklist items.

Contacts tab



The Leads module activates the ability to **Add** Contacts directly to your database without associating them to a loan. You can also filter the Contact table by using the **Roles** drop-down, **Marketing List** (new) and **Territories** (new).

Contact vCard

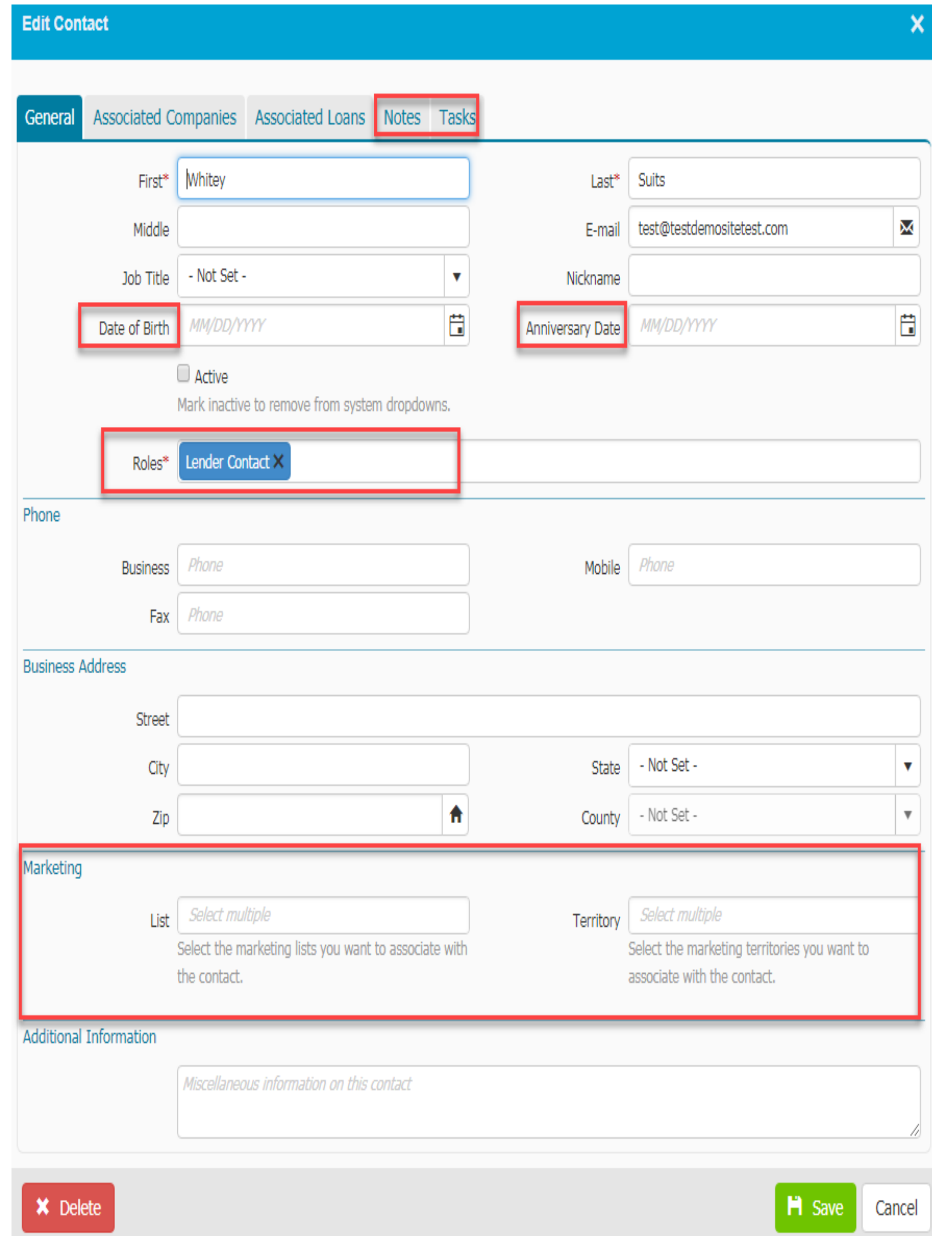
The Leads module contact vCard has had enhancements made to accommodate marketing-type e-blasts for B-days or wedding anniversaries:

- Date of Birth
- Anniversary Date

Multiple **Roles** can be added to a contact. NOTE: You can only select Roles from the list of available options.

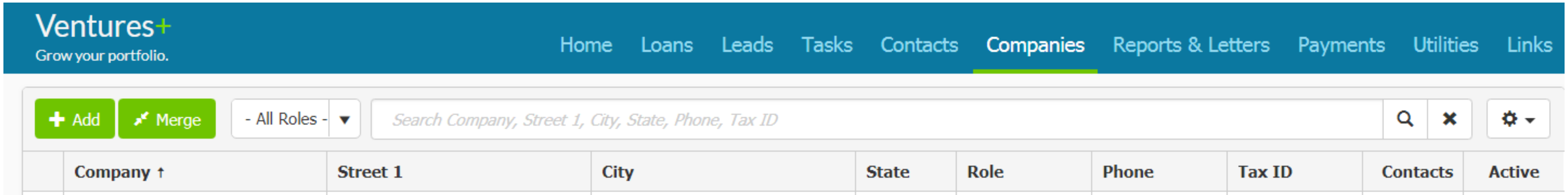
The **Marketing** section options are defined within the Administration menu.

Lastly, **Notes** & **Tasks** have been added to track *contact specific* Notes and Tasks assigned. Note: Administrator can adjust Permissions settings restricting who can view Notes/Tasks entered against a contact.



Companies tab

The Leads module activates the ability to **Add** Companies directly to your database without associating them to a loan.



Reports

There are currently 4 system based reports that allow you to view different aspects of the Leads table:

- **Loans converted from Leads**: View the loans that started as a Lead and were converted to a Loan
- **Leads**: View all loans in your Leads table with an *option* to input Loan Created date as a parameter.
- **Marketing Reports**: View loans where the Marketing List or Territory fields have a selection entered.
- **Referral Source Leaderboard**: View *Leads* that have had an entry made in the Referral table.

+ Add | - All Categories - ▼ | lead

		Report ↑	Description	Category	System
☆		Lead Tracking: Loans converted from Leads	Report showing all Loan...		✔
☆		Lead Tracking: Leads	Report showing all Lead...		✔
☆		Lead Tracking: Marketing Reports	Report for Marketing Te...		✔
☆		Lead Tracking: Referral Source Leaderboard	Leads (Loan Status = Le...		✔

Reports – Tip

Create a Lead Pipeline report based on **Notes**. Each site can customize (via Administration menu) the **Type** drop-down within Notes. The snapshot below is based on the **Type** = **Weekly LO Status**.

Details | Fields | Filters | Results | Favorites

Refresh | Search Log #, Loan Type, Loan Sub Status, Reference Name, Collateral Type, Loan Officer, Weekly LO Status, Weekly LO Statu

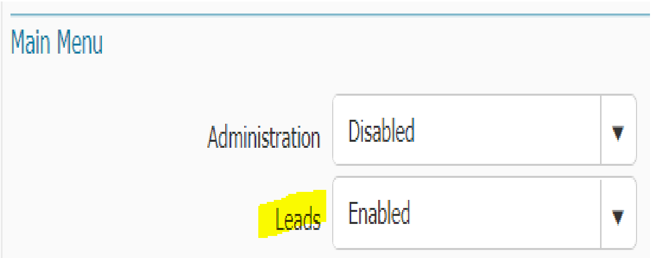
Drag a column header and drop it here to group by that column

Log #	Loan Type	Loan Sub Status	Refe... Name	Collate... Type	Loan Officer	Weekly LO Status	Weekly LO Status AddedOnDate
2018100301	504	New	Test Le...		Denise Marti...	Met with client at coffee sh...	02/13/2019
2018092003	Other	Lost - Changed Stra...	Hoffma...		Warren Buffet	Spoke to client and he's no...	02/13/2019
2018103101	7A	Phone Call 10%	Nivea ...		Jennifer Mae...	Initial phone call with clien...	02/13/2019

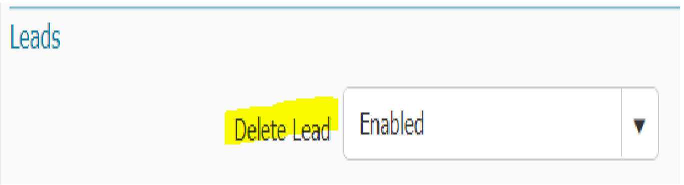
Administration > Permission settings

Site Administrators have access to further customize the following information for Leads after the module has been activated on the site:

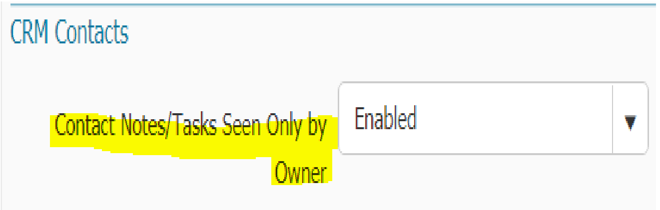
- User Access > Permissions > Menu Item tab: Either **Enable** or **Disable** the Leads tab from the Permission view.



- User Access > Permissions > Action tab: Select whether the Permission view has the ability to **Delete** a Lead.

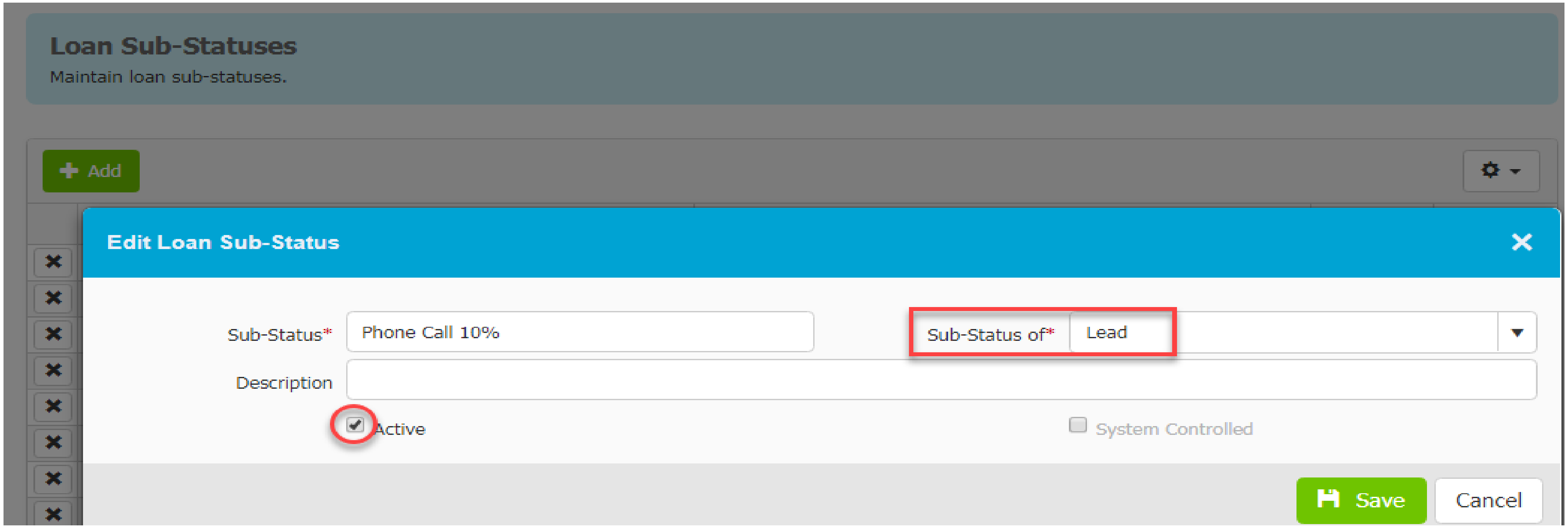


- User Access > Permissions > Data Filter tab: Select whether the *Contact* Notes/Tasks can be seen only by the owner.



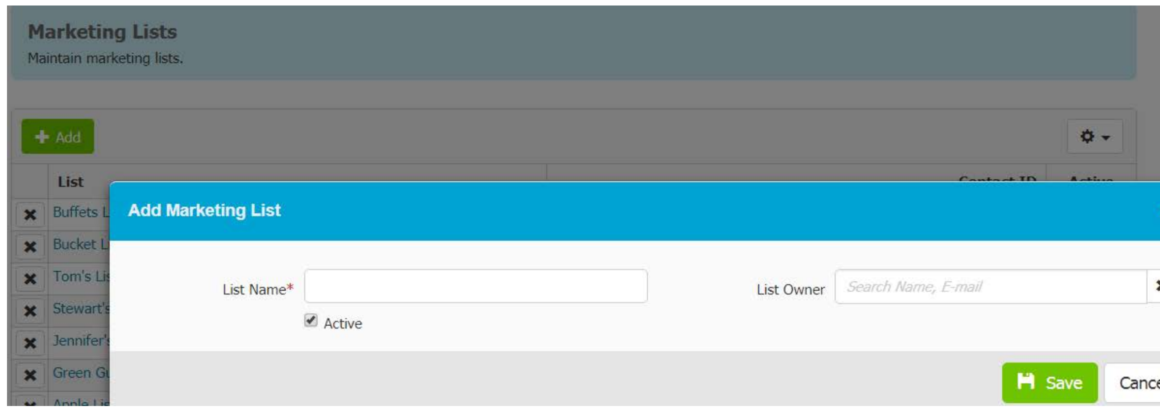
Administration > Reference

Setting the Lead Sub-Status' for your Leads is important. Within the Administration > Reference > Loan > Sub-Statuses menu set the Sub-statuses for your Leads. Example below:

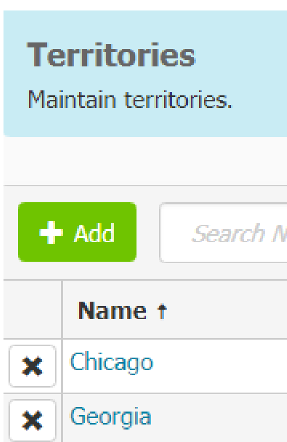


Administration > Reference

Create and/or edit the following lists within the **Reference** menu:



- Marketing Lists
- Sales Territories



Interested in adding this module to your Ventures platform? Please reach out to info@venturesgo.com.

Thank you.