

# VENTURES LENDING TECHNOLOGIES

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Leads module

# Overview

Home Loans **Leads** Tasks Contacts Companies Reports & Letters

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

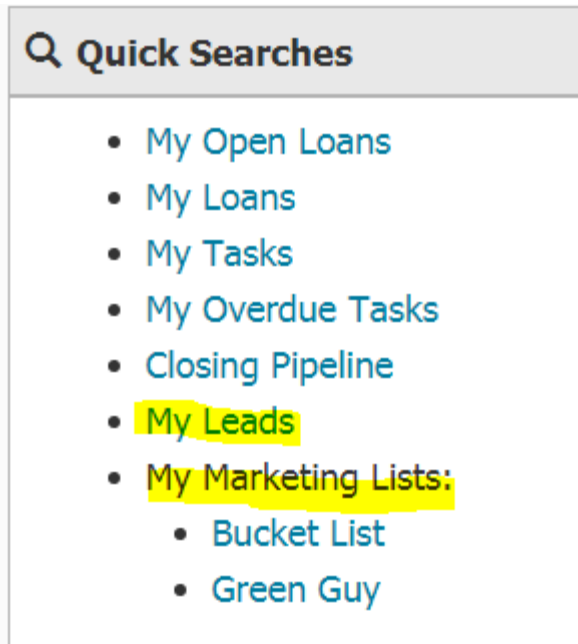
- Track potential leads (prospective loan, personnel, referrals);
- Have a better management of Contacts by adding/editing Role types;
- Record Notes / Tasks against Contacts; and
- Create/Manage marketing lists and exporting the data for integration with vendors such as mailchimp

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.

The screenshot shows the Ventures+ interface with the 'Leads' tab selected. The header bar includes navigation links: Home, Loans, Leads (highlighted), Tasks, Contacts, Companies, Reports & Letters, Payments, Utilities, and Links. Below the header, there is a search bar with a '+ Add' button, two dropdown menus for '- All Statuses -' and '- All Lead Owners -', and a search input field with a placeholder text: 'Search Name, Company Name, Phone, E-mail, Referral Contact, Referral Type, Business Advisor, Lead Owner, Status'. To the right of the search bar are icons for search, close, and settings. Below the search bar is a table with the following columns: Name, Company Name, Phone, E-mail, Referral Contact, Referral Type, Business Advisor, Lead Owner, Status, and Added ↓.

Name	Company Name	Phone	E-mail	Referral Contact	Referral Type	Business Advisor	Lead Owner	Status	Added ↓
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- 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

**Ventures+**  
Grow your portfolio.

Home Loans **Leads** Tasks Contacts Companies Reports & Letters Payments Utilities Links

**Bright Tea** Save ↔ →

Type: Commercial2 • Status: Lead: Phone Call 10%  
Lead > General

**General**

First\*  Last\*   
 Middle  E-mail   
 Job Title  Nickname   
 Company  Spouse   
 Convert to a loan ➔ Convert

**Phone**

Business  Mobile

**Business Address**

Street   
 City  State   
 Zip  County

**Prospective Loan**

Loan Type  Lead Status   
 Amount  Loan Purpose   
 Startup Business ☐ Yes ☐ No ☒ Not Set Business Entry Type

**Personnel**

Lead Owner  Business Advisor

**Referral Sources**

+ Add ⌵

Contact	Type	159 Required	Fees	Paid
<input checked="" type="checkbox"/> Bruno Mars	Banker		\$0	

Save ↔ →

**Notes Tasks**

+ Add + Add Task List - All Statuses - - All Due Dates - - All Types - Search Task, Completed By, Assig Q × ⚙

Done	Task	Comple...	Completed By	Due †	Assigned
<input checked="" type="checkbox"/>	Document & Task Checklists : Business Tax Return - Most Recent	2/4/2019	mvoigt	2/4/2019	Miriam Voigt
<input type="checkbox"/>	Document & Task Checklists : Business Tax Return - Last Year			2/4/2019	Miriam Voigt
<input type="checkbox"/>	Document & Task Checklists : Personal Financial Statement			2/4/2019	Miriam Voigt
<input type="checkbox"/>	Document & Task Checklists : Personal Tax Return - Most Recent			2/4/2019	Miriam Voigt
<input type="checkbox"/>	Document & Task Checklists : Personal Tax Return - Last Year			2/4/2019	Miriam Voigt

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

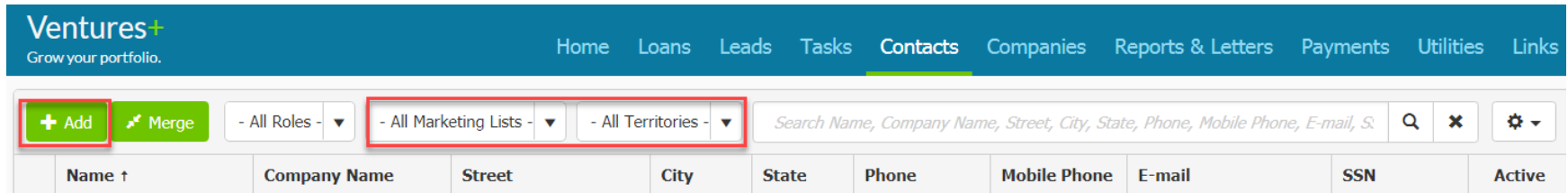
- **Business Address**
- **Amount of loan**
- **Lead Status** – *very important*
- **Referral Sources**

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



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Home Loans Leads Tasks **Contacts** Companies Reports & Letters Payments Utilities Links

+ Add Merge - All Roles - - All Marketing Lists - - All Territories - Search Name, Company Name, Street, City, State, Phone, Mobile Phone, E-mail, S. Q X Settings

Name ↑	Company Name	Street	City	State	Phone	Mobile Phone	E-mail	SSN	Active
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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.

**Edit Contact**

General Associated Companies Associated Loans **Notes** Tasks

First\* Whitey Last\* Suits  
Middle  
E-mail test@testdemositetest.com  
Job Title - Not Set - Nickname  
Date of Birth MM/DD/YYYY Anniversary Date MM/DD/YYYY  
☐ Active  
Mark inactive to remove from system dropdowns.  
Roles\* Lender Contact X  
Phone  
Business Phone Mobile Phone  
Fax Phone  
Business Address  
Street  
City State - Not Set -  
Zip County - Not Set -  
Marketing  
List Select multiple Select the marketing lists you want to associate with the contact.  
Territory Select multiple Select the marketing territories you want to associate with the contact.  
Additional Information  
Miscellaneous information on this contact  
Delete Save Cancel

# Companies tab

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

Ventures+

Grow your portfolio.

Home

Loans

Leads

Tasks

Contacts

Companies

Reports & Letters

Payments

Utilities

Links

+ Add

✕ Merge

- All Roles - ▼

Search Company, Street 1, City, State, Phone, Tax ID

Q

✕





⚙ ▼

Company ↑	Street 1	City	State	Role	Phone	Tax ID	Contacts	Active
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# 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.

<div><div><div><div></div><div></div></div><div>+ Add</div></div><div><div>- All Categories -</div><div>▼</div></div><div>lead</div></div>					
		Report ↑	Description	Category	System
☆		<a href="#">Lead Tracking: Loans converted from Leads</a>	Report showing all Loan...		✓
☆		<a href="#">Lead Tracking: Leads</a>	Report showing all Lead...		✓
☆		<a href="#">Lead Tracking: Marketing Reports</a>	Report for Marketing Te...		✓
☆		<a href="#">Lead Tracking: Referral Source Leaderboard</a>	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 Stati

Q

×

⚙

▼

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.

Main Menu

Administration	Disabled	▼
Leads	Enabled	▼

Leads

Delete Lead	Enabled	▼
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CRM Contacts

Contact Notes/Tasks Seen Only by Owner	Enabled	▼
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# 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:

The screenshot shows the 'Edit Loan Sub-Status' form. The 'Sub-Status\*' field contains 'Phone Call 10%'. The 'Sub-Status of\*' dropdown menu is open, showing 'Lead' as the selected option. The 'Description' field is empty. The 'Active' checkbox is checked and circled in red. The 'System Controlled' checkbox is unchecked. The 'Save' button is green and the 'Cancel' button is white.

**Loan Sub-Statuses**  
Maintain loan sub-statuses.

**Edit Loan Sub-Status**

Sub-Status\* Phone Call 10%

Sub-Status of\* Lead

Description

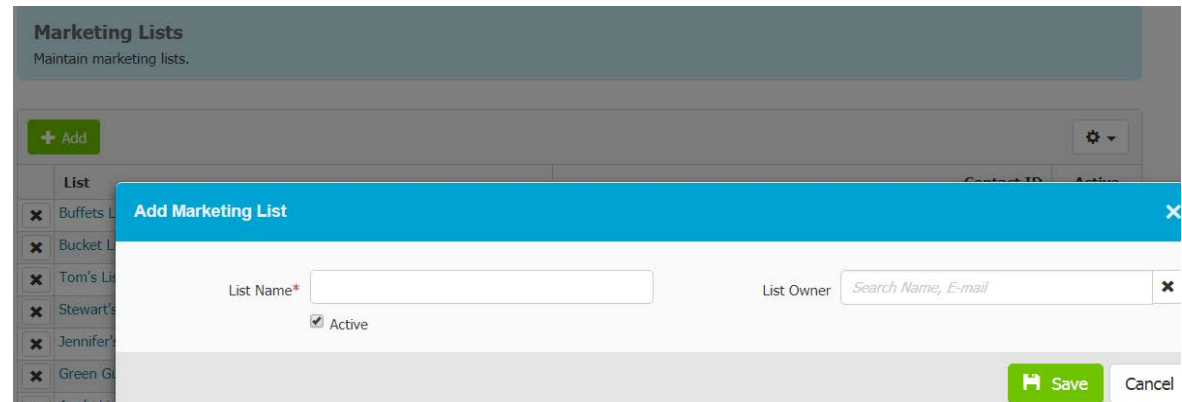
☒ Active ☐ System Controlled

Save Cancel

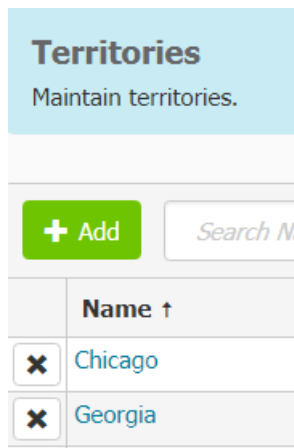
# Administration > Reference

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

- Marketing Lists
- Sales Territories



The screenshot shows the 'Marketing Lists' section of a software interface. At the top, there's a header 'Marketing Lists' with the subtitle 'Maintain marketing lists.' Below this is a '+ Add' button and a settings icon. A modal window titled 'Add Marketing List' is open, featuring a 'List Name\*' text input field, a 'List Owner' dropdown menu with the placeholder 'Search Name, E-mail', and an 'Active' checkbox. At the bottom of the modal are 'Save' and 'Cancel' buttons. In the background, a table of existing lists is visible, including 'Buffets L', 'Bucket L', 'Tom's Li', 'Stewart's', 'Jennifer', 'Green G', and 'Anna Li'.



The screenshot shows the 'Territories' section of a software interface. At the top, there's a header 'Territories' with the subtitle 'Maintain territories.' Below this is a '+ Add' button and a search input field with the placeholder 'Search N'. A table of territories is displayed with a 'Name ↑' header. The table contains two entries: 'Chicago' and 'Georgia', each with a delete icon (an 'x' in a square) to its left.

Interested in adding this module to your Ventures platform? Please reach out to [info@venturesgo.com](mailto:info@venturesgo.com).

Thank you.