Lead Management User Guide

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Introduction

The Lead Management module provides an ideal environment for working on data outside of the main Gold-Vision system. For example you may wish to keep a number of lists for marketing and lead generation purposes. However, this data may not be in a state of accuracy, structure or completion where it can simply be loaded into the full CRM environment without compromising the existing data, and potentially triggering duplicate alerts. Typically, this data may have come from a source (e.g. web enquiry form, exhibition list etc) where that data may be incomplete and requiring qualification prior to inclusion in to Gold-Vision

However, there is still an all-important link with your other data. Gold-Vision Lead Management runs deduplication processes with the core CRM data and with data from other list sources, providing an additional level of control, without sacrificing the freedom to act. On the other hand, having the resource available to improve this data is simply not an option.

Sales & marketing management can enjoy powerful functionality to filter the list data and assign to sales individuals or teams, and then easily monitor progress against target. In fact the users can instantly see their own performance against target.

For data with a known provenance and quality, there is the same powerful integration with our Connect e-marketing solution for mailshots, and the response information is captured automatically in Lead Management. Of course, when a business relationship reaches the next stage, simply promote the record into the full CRM environment and use the system to automatically create appropriate CRM records and structures.

In summary, Gold-Vision Lead Management provides great new options for working with your information to generate business quickly and effectively:

- Import volumes of data and keep your Gold-Vision database unaffected
- Lead records can be Contact focused and do not necessarily require Company information.
- Powerful De-Duplication scoring applied on import to assist with lead qualification

- Leads can be divided up between different teams or individual users to be worked on using the assign process.

- Efficiently qualify Leads and either discard or progress
- Simple, effective interface to allow for quick processing of the Leads
- Set Lead progression targets by Team or User
- Send Mailshots to your Lead prospects or filter Leads to send more direct mailings
- Promote valuable Leads to Gold-Vision keeping required notes and data captured

- Opportunities, Activities and other follow-up items can also be created automatically as part of the 'promote to Gold-Vision' process.

- Fully utilise Gold-Vision functionality for promoted Leads



Lead Management Configuration and Import Process



Admin Console - Lead Management Set-up

Prior to using Lead Management for the first time, the Gold-Vision Administrator will need to perform some administration steps using the Gold-Vision Administration Console.

Please note: you may need a new Licence Key to access Lead Management in Gold-Vision once you have completed the set as below.

User Access Options: Users who require access to Lead Management will need to be added to a Team which has been given permission to access the Leads area of the system

User Access Options Use this screen to customise Gold-Vision access by Team. You can configure which areas of the product users have access to, including edit and deletion rights. Please note that cl licencing limits. When you are finished, click 'Save' to update the changes. Gold-Tracker 🧧 🦲 Gold-Vision 🏻 🎒 Admin Console Contacts Accounts Emails Activities Appointments Profiles Reports Dashboards Leads 📥 Outlook Sync Administrators (4) V Access Access ✓ Access V Access ✓ Access Access Access V Access ✓ Access Access ✓ Edit ✓ Edit 🗸 Edit ✓ Edit ✓ Edit 🔽 Edit Edit ✓ Edit ✓ Edit Delete 🔽 Delete Delete V Delete Delete Delete ✓ Delete ✓ Delete Delete Enable Lead Management Services will need to be ticked Gold-Vision Administration Console Home * User Interface * Settings * Users * Products Data \rightarrow Lead Management \rightarrow Lead Management Settings (see below for more details on settings) Lead Management Enable Lead Management Services: Licences **Gold-Vision Licencing** Access to Lead Management is on a licenced user basis. 3BA038F4-A256-4843-BCF5-F781F535367B Customer Kev: When enabling Lead Management users (see below) you Customer Key: Expires on 31/07/2012 should consider the number of licences available. This can be checked via: Settings \rightarrow Licencing. The current user usage and limits are shown below: Mail-Tracker Users: 0 / 0 Please contact your account manager if additional Gold-Tracker Users: 2 / 0 Gold-Vision Users: 12 / 40 licenses are required. Total Users: 14 / 40 (Mobile Enabled: 1 / 40) You can update existing users to allow access Lead (Leads Enabled: 13 / 15) Management. Lead Management Outcomes User Interface Settings Users General Settings The drop down options for Lead Status/Outcomes can be Screen Design adjusted via the menu List Design elds contain spe Drop Downs Standard Page Defaults Special

v-bd-e--



There are checkboxes to control the behaviour of Lead Management options.	Lead Management
Import Data Summary Style – chose the format of the Lead summary from the dropdown	Enable Lead Management Services:
Disable Timer – Tick to disable the timer on the Lead Management Screen.	Import Data Summary Style: Firstname Lastname (Company Name) Disable Timer:
Disable Timer Pause Button – Tick to disable the Timer Pause Button on the Lead Management Screen	Disable Timer Pause Button:
Disable Free-Text on Status – Tick to prevent Users from entering free text on the Lead Outcome/Status	Firstname Lastname (Company Name) Company Name (Firstname Lastname) Firstname Lastname (Company Name) Company Name (Lastname, Firstname) Lastname, Firstname (Company Name)
The settings shown in the lower portion of the screen are used for resource control of the de-duplication process. Please ONLY update as directed by Gold- Vision Support.	Default Deduplication Package: Gold-Vision Default Maximum Bulk Deduplication Processes: 1 Maximum Single Deduplication Processes: 10 Deduplication Procedure Timeout (seconds): 60 Deduplication Poll Interval (seconds): 30 Maximum Asynchronous Records: 10 Disable Deduplication on Save:
	Save

	n Console								
me 🔹 User Interface	 Settings - Users - Pr 	oducts - Integrations - Al	erting 🛀 Data 🐇 Documents	S * LiveUpdate * Help *					
eduplication Job	S			Refresh	Select All	Deselect All	Re-Queue	Hold	
A . T	A V	A . T	▲ ▼	▲ ▼	*	•	A V		
Summary	Scheduled Start	Actual Start	Completed	Created	Status	Records	;	Select	
	Q Select a date	Select a date	Select a date		All All	-	Σ	2	Q
Export A	25/05/2012 14:20:23	25/05/2012 14:20:24	25/05/2012 14:20:25	25/05/2012 14:20:23	Complete		1044		
Leads F	25/05/2012 11:18:18	25/05/2012 11:18:18	25/05/2012 11:18:19	25/05/2012 11:18:18	Complete		43		
Export F	24/05/2012 15:39:22	24/05/2012 15:39:22	24/05/2012 15:39:28	24/05/2012 15:39:22	Complete		719		
Export F	24/05/2012 16:04:27	24/05/2012 16:04:27	24/05/2012 16:04:27	24/05/ 24/05/2012 15:39:22	Complete		719		
charlie-test-EW3	23/05/2012 16:49:29	23/05/2012 16:49:29	23/05/2012 16:49:29	23/05/2012 16:49:29	Complete		1		

The Targets screen in the Users menu can be used to define User targets for the number of Leads actioned by day/week/month.

User Access Options

 Gold-Vision Administration Console

 Home *
 User Interface *
 Settings *

Target Definition - New

Type: Sales per Month Sales per Month Sales per Quarter Save Sales per Year Leads Actioned pe

Leads Actioned per Day Leads Actioned per Week Leads Actioned per Month

Targets

Importing data into Lead Management

Downloading and using the Data Import Tool

The data import tool can be downloaded from the Gold-Vision Administration Console by accessing the Data Menu Option. Please see the Data Import Guide for further detailed instructions on how to download.

A new version of the standard Gold-Vision import tool (V5.0.5.12 or greater) supports Lead imports.

If you already have previously installed the Data Import Tool, this will automatically be updated to show the additional 'Lead Management' tab if you have access rights to Lead Management.

(If the tool does not update automatically it can be re-downloaded via the Data menu in the Gold-Vision Administration Console)

De-Duplication

Lead Management has some advanced de-duplication facilities, and checks incoming data for duplication within the imported list, between imports and in Gold-Vision.

This does mean that an imported list is not available to be worked on until the de- duplication process is complete. The Lead list will become visible in Lead Management when the de-duplication process is complete.

Import and de-duplication can be scheduled to run out-of-hours, or run immediately.

The performance will be dependent upon server specification, the size of the Lead list and the size of existing data. As a rule of thumb, we would suggest that larger lists should be scheduled to be de-duplicated and imported out of business hours to ensure there is little impact on user access.

When duplicates are found, two fields are calculated.

Duplicate Score – The maximum score of all the rules which have returned duplicates

Duplicate Count – The number of Contact records of which the item is a duplicate. This is <u>not</u> the number of duplicates in total (i.e. where two separate rules have indicated the same Contact record is a duplicate, this will contribute to the Duplicate Count as a single duplicate). See Appendix B for duplicate rules.

Please see Appendix A and B for examples of de-duplication scoring.

Format List

The Gold-Vision Lead Management facility can be used to import a wide variety of different List formats. For example you might have a list with just Company name, Contact name and email address, or alternatively you may have full Company and Contact details.

Firstly, decide which fields in the imported list will subsequently be linked to fields in the Gold-Vision Account, Contact & Opportunity records etc.

It's advisable to check the following:

- There are no duplicate column headings within your source data
- Columns you do not want to import have been deleted from your source data
- The file should be saved as a CSV file before commencing
- The data is in an acceptable format for initial insertion into Lead Management
- Please ensure that any fields required for use with lead management are included as a column during import. For instance, if a field will be required to enter data into in Lead Management ensure you have included a blank column in your spread-sheet as the field will be created on import.

(See examples below of Company and Contact data)

	А	В	С	D	E	F	G	Н	I. I.
1	Company	Address1	Address2	Address3	Town	County	Postcode	Country	Website
2	ABC Corp.	1st Floor	Unit 3	23 Long Lane	Bridge Town	Warks	CV2 3TL	UK	www.esteiro.co.uk
3	BBR Ltd	Unit 56	Browns Lane		Coventry	Warks	CV2 4TC	UK	www.bbr.com
4									

J	K	L	М	N	0	Р	Q	R	S
Title	Firstname	Surname	Job Title	Phone	Fax	Email	Lead Ref No	Lead Opportunity Name	Value
Mr	Jim	Brown	Director	00121 333	023 333 455	someoone@anyco.com	12342	Major Project	100
Mrs	Jane	Smith	Manager	123 567	0044 1223	anyplace@me.co.uk	34534535	Big Green House	456

At a later stage you can decide which fields need to be in the Gold-Vision destination record. For instance you may want specific fields imported into Lead Management which are not then used in the Gold-Vision Account record.

The Lead Management system can create some or all of:

- An Account (Company) record
- A Contact Record
- An Opportunity e.g. a sales opportunity
- An Account Activity e.g. a follow up call
- A Profile associated with the Company and Contact e.g. a product of interest

Please ensure that you have included all fields required in your lead management screen as a column in your spreadsheet.

Starting a new Import

Files can be imported into Lead Management in separated text formats such as CSV or tab delimited.

Lead imports are performed in a similar way to standard Gold-Vision imports.

Start the Gold-Vision Import tool, connect to Gold-Vision and switch to the Lead Imports tab.

ne:					
Gold-Vision Impo	rt Client			? (i	
GV Imports LeadsImports					
🙀 Start a new import 🔀 Auto	Refresh				
Summary	Start Date	Total Rows	Processed Rows	Status	^

Click Start a new import to start the Import process - this will take you to the screen below

Screen Two:	
Click browse a	ind select your file.
	Gold-Vision Import Client
	w File
	File Browse
	Delimiter , 🔹 Qualifier " 🐨 🗹 Has header row

review	of your file	is displayed	l to allow y	ou to chec	k that the	e columns a	re correctl	y formatted.	
1000	Gold-Vision Imp	oort Client							
File									
ap the									
File	C:\Users\nkbugla	A\Desktop\6.4\Oppo	ortunities May 12.cs	/		<u>B</u> rowse			
Delimiter	,	 Qualifie 	r "	▼ Has	header row				
Company	Address 1	Address 2	Address 3	Town	County	Postcode	Country	Website	Title
ABC Com	1st Floor	Linit 3	23 Long Lane	Bidge Town	Warke	CV2 3TI	LIK	www.esteiro.co.uk	Mr
NDC COIP		Descus	20 cong cano	Covertry	Warke	CV2 4TC	UK	www.bbr.com	Mrs

Mapping

Please setup mapping using the screen below, the table below provides a detailed overview of each column.

(The key difference between the Lead Management import and the standard Gold-Vision import is that there is an extra function to map the import fields to relevant Gold-Vision fields. This is required to allow an automated promote function.)

Screen Four: Setup Mappings

4000	Gold-Vision Import	Client							
Mappi	ngs								
Select	File Header	Column Name	Column Label	Data Type		Gold-Vision Object		Gold-Vision Field	
Select	Send Samples	SENDSAMPLES	Send Samples	Text (100)	•	Not Set	-	Not Set	٦,
Select	Value	VALUE	Value	Text (100)	•	Not Set	•	Not Set	-
Select	Lead Opportunity Na	LEADOPPORTUNITYNAM	Lead Opportunity Name	Text (100)	•	Not Set	•	Not Set	-
Select	Lead Ref No	LEADREFNO	Lead Ref No	Text (100)	•	Not Set	•	Not Set	-
Select	Email	EMAIL	Email	Text (100)	-	Not Set	-	Not Set	-
Select	Fax	FAX	Fax	Text (100)	•	Not Set	•	Not Set	-
Select	Phone	PHONE	Phone	Text (100)	•	Not Set	•	Not Set	
Select	Job Title	JOBTITLE	Job Title	Text (100)		Not Set	•	Not Set	
Select	Surname	SURNAME	Surname	Text (100)	+	Not Set	+	Not Set	-
Select	First Name	FIRSTNAME	First Name	Text (100)	•	Not Set	-	Not Set	

The mappings screen lets you determine where data from the imported list will be applied in Gold-Vision.

Select	Click Select to omit any fields from the import				
File Header	This displays the column heading of the imported file				
Column Name	This displays the Lead Management temporary file name – These can be edited and must be unique				
Column Label	This is the label of the field you will see in the Lead Management screen. This can be edited if required.				
 Data Type Select from the drop down eg Text, numeric, date Bool = checkbox, your data should be set to either True or False Drop = contents of a drop down field, please note if you would like a drop down field to be populated your drop down options should exist in Gold-Vision. 	Text (100) Text (100) Text (255) Numeric DateTime Bool Drop				

Cold Vision Object	
Gold-Vision Object	Account (ACCOUNT)
	Not Set
	Account (ACCOUNT)
Select the Gold-Vision object from the drop	Contact (CONTACT)
, down	Opportunity (OPPORT
	Profile (PROFILE)
	Activity (ACCOUNT_A
	norse
Gold-Vision Field	Account Name (SUMM 🚾
	Account Name (SU
Select the relevant field from the drop down	Security (ACG_ID)
A mushing laft an mat ant will be immented	Alert (AC_FLAG)
Any fields left as not set will be imported	Account Manager (
into the Lead Management system but will	Account Type 1 (TY
not be imported into Gold-Vision	Account Type 2 (TY
	Primary Contact (AC

In this example the Lead Opportunity Name field is being mapped to an Opportunity.

Screen Five: Completed Mapping

A completed mapping is shown below. The completed mapping should always include some elements of an Account (Company) record, and a Contact will nearly always be present

Select	File Header	Column Name	Column Label	Data Type		Gold-Vision Object	Gold-Vision Field
Select	Send Samples	SENDSAMPLES	Send Samples	Text (100)	*	Not Set 👻	Not Set
Select	Value	VALUE	Value	Text (100)	*	Opportunity (OPPORT -	Value Won (VALUE_WO 🔻
Select	Lead Opportunity Na	LEADOPPORTUNITYNAM	Lead Opportunity Name	Text (100)	*	Opportunity (OPPORT 🔹	Summary (SUMMARY)
Select	Lead Ref No	LEADREFNO	Lead Ref No	Text (100)	•	Account (ACCOUNT)	Lead Reference (AC_UD 🔻
Select	Email	EMAIL	Email	Text (100)	•	Contact (CONTACT)	Email 1 (EMAIL1ADDRE 💌
Select	Fax	FAX	Fax	Text (100)	•	Account (ACCOUNT)	Main Fax (FAX_1)
Select	Phone	PHONE	Phone	Text (100)	•	Account (ACCOUNT)	Main Phone (PHONE_1) *
Select	Job Title	JOBTITLE	Job Title	Text (100)	*	Contact (CONTACT)	Job Title (JOBTITLE)
Select	Surname	SURNAME	Surname	Text (100)	•	Contact (CONTACT)	Last Name (LASTNAME 👻
Select	First Name	FIRSTNAME	First Name	Text (100)	*	Contact (CONTACT)	First Name (FIRSTNAMI 👻
Select	Title	TITLE	Title	Text (100)		Contact (CONTACT) 🔹	Title (TITLE)
Select	Website	WEBSITE	Website	Text (100)	•	Account (ACCOUNT)	Web Site (WEB_SITE_1) 🔹
Select	Country	COUNTRY	Country	Text (100)	*	Account (ACCOUNT)	Country (COUNTRY)
Select	Postcode	POSTCODE	Postcode	Text (100)	•	Account (ACCOUNT)	Post/Zip Code (POSTC(~
Select	County	COUNTY	County	Text (100)	*	Account (ACCOUNT)	County/State (COUNTY -
Select	Town	TOWN	Town	Text (100)	•	Account (ACCOUNT) -	Town/City (TOWN)
Select	Address 3	ADDRESS3	Address 3	Text (100)	•	Account (ACCOUNT)	(ADDRESS_3)
0							
				Sav	e	Load Va	lidate Reset

Save Allows you to Save your mapping for use with a similar list in future

Load Allows you to Load previously saved mappings

Validate Checks that all Column names are unique and checks that a Gold-Vision field has not been mapped twice. If the validation fails you will receive the following error.

The following design error(s) occurred: Column name 'ADDRESS_' has been used more than once.
ОК

Reset – Resets the fields to not set and allows you to start again.

<u> Screen Six – Import List:</u>	Sold-V	ision Import Client			
	Summary				
Click Next to move to the Sun	nmary Import Summary	London Exhibition			
screen	Object Label	Exhibition Leads			
Sereem	beaupireation rac	Import Now Import La	ater		
In the set Commence Allower		2012-05-31 09:31			
Import Summary – Allows yo	u to				
uniquely name your import e	g l	 Deduplicate immediately 	Deduplicate later		
Internetworld 2012 List or		2012-05-31 09:31			
Technology For Marketing201	L2 List				
Object label - This will identif	v the				
list and the series which is an					
list and the screen which is ch	ealed				
in Gold-Vision. (If you are upo	dating				
a mapping this will be popula	ited				
automatically)	Name, schedule and f	inalise details for the import.			
				<u>B</u> ack <u>F</u> inish <u>C</u> a	ancel
Select to either Import Now of	or				
Import Later.					
If a share to be set to be		Upload complete.	The service will now start you	ur import, unless you have	
If you choose to import Later	you	scheduled it for a	later time		
may also want to Deduplicate	e Later.				
				ОК	
		L			
Click Finish to Run the import					
•					
Screen Seven: Import Client -	Lead Imports scree	<u>n</u>			
	¢ , , , ,				
Here you can follow the prog	ress of your Import.				
Gold-Vision Import Client				- 2 1 6	
Gold Vision Import Circlin					
GV Imports LeadsImports					
🐺 Start a new import 🛛 🥩 Auto Refresh					
Summany Start	Total Rowa	Processed Powe	Status	Dedune Statue	~
Date		FIDCESSED NOWS			
LM Update List 12/06/	/201 2	0	Complete No Errors	Ready	
test 3 31/05/	/201 2	0	CompleteWithErrors	Ready	
Test 2 31/05/	/201 44	0	CompleteNoErrors	Ready	
Test 1 31/05/	/201 39	0	Complete No Errors	Complete	

If your import status reads "CompleteWithErrors" please contact Gold-Vision Support who will direct you to downloading your import log file to understand the errors you are receiving.

31/05/201..

London Exhibition

Complete No Errors

Updating an Import

If you have been provided with Lead data in a file format which is identical to that used previously, you will be able to re-use the Lead Data Definition set up previously. This means that you can save time by avoiding the need to Map fields and re-design the Lead Management Screen.

Having an Identical Lead Data File Format means:

- a) File header row contains exactly the same column names
- b) The order of the column names (left to right) are **exactly** the same

	А	В	С	D	E	F	G	Н	I. I.
1	Company	Address1	Address2	Address3	Town	County	Postcode	Country	Website
2	ABC Corp.	1st Floor	Unit 3	23 Long Lane	Bridge Town	Warks	CV2 3TL	UK	www.esteiro.co.uk
3	BBR Ltd	Unit 56	Browns Lane		Coventry	Warks	CV2 4TC	UK	www.bbr.com
4									
5									

Using a Control Column

A control column can be added to your updated data to select the update type on import. However, this is **optional**. By default the following values can be used although this can be changed and updated to use your specific values during the update import process.

Step One: Add a column to your data called "Control"

Control Column Values (if applicable)						
Update Value	U					
Insert Value	Ι					
Delete Value	D					

Step Two: Enter the values U, I or D in each row to specify the update type

Step Three: During the mapping stage of the import ensure you select your Control Column before progressing.

		В	С									
	Title	Firstname	Lastname	Job Title	Company	Town / city	Country	Company Phone	Direct Phone Nur	Mobile Number	email	Control Column
	Ms	Sheryl	Crow	Procurement Ma	Atlantic Group In	Atlantic City	USA	001 485 765 3300	001 485 765 3302		scrow@aggroup.	U
3	Sir	Cliff	Richard	IT Director	Avrian Logistics L	Bournemouth	UK	0044 1202 776 880	0044 1202 776 887	07856 774 556	cr@avlogistics.co	U
	Mr	Gary	Barlow	Operations Mana	GB Enterprises Lt	Berlin	Germany	0049 228 745 881	0049 228 745 881		garybarlow@gbe	U
	Mr	Gloria	Estafan	Procurement Ma	GB Enterprises Lt	Berlin	Germany	0049 228 745 881	0049 228 745 881		gloriaestafan@gl	U
	Ms	Mariah	Carey	Operations Mana	Aspect Aviation	Liverpool	UK	0044 151 748 300	0044 151 748 303	0771 886 779	mcarey@pbcllp.c	1
	Ms	Whitney	Houston	IT Director	PBC LLP.	Basildon	UK	0044 1268 364 900	0044 1268 364 908	07970 768 993		D
	Ms	Janet	Jackson	IT Director	Apex Systems Ltd	Leeds	UK	0044 113 500 900	0044 113 500 900			U
	Mr	Billy	Joel	Procurement Ma	GKM Transformat	Melton Mowbray	UK	0044 1664 870 970	0044 1664 870 974		bj@gkmtransforr	U
	Mr	Robbie	Williams	Senior Operation	BBT Insurance Se	Birmingham	UK	0044 161 883567	0044 161 883567	07791 447 295	rw@bbt.com	U
	Ms	Kylie	MiFALSEgue	Procurement Ma	BBT Insurance Se	Birmingham	UK	0044 161 883567	0044 161 883567	07791 876 556	kylie@bbt.com	U
	Mrs	Kate	Bush	Managing Directo	BBT Insurance Se	Birmingham	UK	0044 161 883567	0044 161 883567		kate@bbt.com	U
13	Ms	Toyah	Wilcox	IT Director	Atlantic Group In	Atlantic City	USA	001 485 765 3300	001 485 765 3305			U

If you do not wish to use a control column continue with the following steps.

If you have more data from the same source or in the same format you can use the <u>original</u> import by right clicking on the name of the import and selecting create new import from this.

Screen One – Upda	te Import:								
Gold-Vision I	mport Client				?	i	8		
GV Imports LeadsImports	GV Imports LeadsImports								
🐺 Start a new import 🛛 🤹	Auto Refresh								
Summary	Start Date	Total Rows	Processed Rows	Status	Dedupe Status		^		
London Exhibition	31/05/201	44		CompleteNoErrors	Complete				
dfgfdgfd	pdate import	1	0	Complete No Errors	Ready				

If you have more data from the same source or in the same format you can use the original import by right clicking on the name of the import and selecting create new import from this.

Click browse and select your file.								
	Gold-Vision Import Client							
	in File							
	File		<u>B</u> rowse	•				
	Delimiter , 🗾 Qu	alifier 🔹 🔻 🗸 Has header r	row					
с т і								
Screen Three -	- validate Mapping and Set N	latch Data:						
Map the fields	to the original columns as be	low						
	6							
	4							
	Gold-Vision Import Client							
	Mappings Select File Header	Original Column Name	Match Key	Control Column				
	Select Value	Value (VALUE)	- D					
	Select Lead Opportunity Name	Lead Opportunity Name (LEADOPPORTUNITYNAME)	•					
	Select Lead Opportunity Name Select Lead Ref No	Lead Opportunity Name (LEADOPPORTUNITYNAME)						
	Seect Lead Opportunity Name Select Lead Ref No Select Email	Lead Opportunity Name (LEADOPPORTUNITYNAME) Firstname (FIRSTNAME)						
	Select Lead Opportunity Name Salect Lead Ref No Select Email Select Fax	Lead Opportunity Name (LEADOPPORTUNITYNAME) Firstname (FIRSTNAME) Sumame (SURNAME) In The (VIRTUE 0)						
	Seisci Lead Opportunity Name Seisci Lead Ref No Seisci Email Seisci Fax	Lead Opportunity Name (LEADOPPORTUNITYNAME) Firstname (FIRSTNAME) Sumame (SURNAME) Job Title (JOBTTLE) Phone (PHONE)						
	Select Lead Opportunity Name Select Lead Ref No Select Email Select Fax Select Phone Select Job Title	Lead Opportunity Name (LEADOPPORTUNITYNAME) Firstname (TRSTNAME) Sumame (SURNAME) Job Title (JOBTILE) Phone (PHONE) Fax (FAX)						
	Select Lead Opportunity Name Select Email Select Fax Select Phone Select Job Title Select Sumame	Lead Opportunity Name (LEADOPPORTUNITYNAME) Firstname (TRSTNAME) Sumame (SURNAME) Job Title (OBTITLE) Phone (PHONE) Fax (FAX) Email (EMAIL)						
	Seice Lead Opportunity Name Seice Email Seice Fax Seice Phone Seice Job Tite Seice Eirstname Seice Eirstname	Lead Opportunity Name (LEADOPPORTUNITYNAME) Firstname (FIRSTNAME) Sumame (SURNAME) Sol Title (UOBTITLE) Phone (PHONE) Fax (FAX) Email (EMAIL) Lead Berk No. (LEADREFNO) Lead Opportunity Name (LEADOPPORTUNITYNAME)						
	Search Lead Opportunity Name Search Lead Opportunity Name Email Search Fax Search Phone Search Job Title Search Firstname Search Title	Lead Opportunity Name (LEADOPPORTUNITYNAME) Firstname (FIRSTNAME) Sumame (SURNAME) Job Title (IOBTITLE) Phone (PHONE) Fax (FAX) Email (EMAIL) Lead Ref No (LEADREFNO) Lead Opportunity Name (LEADOPPORTUNITYNAME) Value (VALUE)						
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Seet Town Seet Address3 Seet Address2 Seet Address1 Seet Company	
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Save Load Validate	
Save Load Validate	
	<u>R</u> eset
Define how the table relates to Gold-Vision and the input file.	

• Match Key – Ensure that you have selected a single match key to use when updating your initial list. This match key will be used to match against existing data. This match key will be used to update your existing data.

(If a match key is used in conjunction with a control column the control column will state the update type eg Update, insert or delete).

• **Control Column** – If you have chosen to include a control column in your spreadsheet ensure you select the field before progressing.

Click Next to continue

<u>Screen Four – Import List:</u>	4				
· · · · ·	Gold-Vision	Import Client			
	Summary				
Import Summary – Allows you to	Import Summary				
	Object Label Deduction Package				
uniquely name your import eg	o coopie constrained and	Import New Import Later			
Internetworld 2012 List or Technology			-		
		2012-06-06 10:36			
For Marketing2012 List					
-		Deduplicate immediately O Deduplicate later			
		2012-06-06 10:36			
Object label – Will be set automatically					
, , , , , , , , , , , , , , , , , , ,	Control Column Values	(if applicable)			
on update imports.	Insert Value	I			
	Delete Value	D			
Solact to oithor Import Now or Import					
Select to either import now of import					
Later.					
If you choose to Import Later you may					
	Name, schedule and finalise	details for the import			
also want to Deduplicate Later.		ancianta nen sine mogeante.		Back Einish Cano	cel
-					_
Control Values - If you have chosen					
different Control values in your		Unload consults. The ending			
spreadsheet these can be undated here		opioad complete. The service	will now start your impor	t, uniess you nave	
spreadsheet these can be updated here		scheduled it for a later time			
before progressing					
				······	
Click Finish to Run the import				OK	-
chek i mon to kun the import.					ŀ

Gold-Vision Configuration - Lead Screen Design:

When a list is imported using the above process a default screen layout is generated.

It is then possible to use the Gold-Vision Administration Console Screen Design facility to customise the layout of the Lead screen.

In the admin console, select: User Interface -> Screen Design

Home - User Interface - Settin	gs ⊤ Users ⊤ Products ⊤ Integr	ations - Alerting - (Data 🕆 Documei	nts - LiveUpdate - Help -	
Screen Design					
The Cold Vision erroon designer all	aver you to add, comove and configure	fields on most item sere	ang. Click on a Co	id Vicion item below to open the c	araan dagianar
The Gold-Vision screen designer all	ows you to add, remove and configure	neids on most item scre	ens. Click on a Go	d-vision item below to open the s	creen designer.
Item	Last Modified	Туре	Open By	Open Date	
Account	01/06/2012 12:37:19	Item Definition	-	-	
Account Activity	13/02/2012 17:09:42	Item Definition	-	-	
Appointment	03/11/2011 13:47:33	Item Definition	-	-	
Campaign	30/01/2012 13:59:44	Item Definition	-	-	
Contact	01/06/2012 14:12:36	Item Definition	-	-	
Leads (basicleadlist)	11/06/2012 13:36:20	Extension Definition	-	-	
Leads (cnariletestew)	23/05/2012 16:49:29	Extension Definition	-	-	
Leads (dedupetest)	31/05/2012 09:07:08	Extension Definition	-	-	
Gold-Vision Logged on as Nikki Bug	la Check for Gold-Vision Updates				

Click on the link name to access the Gold-Vision screen designer.

From the screen designer you will be able to do the following:

- Select additional fields to be visible on the screen. (These can be selected from the "Available" tab. A list of available fields can be found in APPENDIX C.)
- Make fields mandatory



(Please note that Lead Management does not have User Defined fields which can be re-named as in other standard sections of Gold-Vision. If you have a field you would like to import please ensure this exists as a column in your source file).

Gold-Vision Configuration – Alert and Workflow Setup

Set Up Alert Workflow: After the Lead has been promoted into Gold-Vision you may wish to create a workflow to manage the follow up steps. e.g. Send an email to a designated user, create a follow up activity and set the opportunity source.

Assuming that promoting the Lead has created a new Opportunity, the workflow below can be used to create follow up actions:

Select: Alerting → Configure Alerting → New → On Save Alert → Opportunity

Set Conditions: Created & Update Source =' updatesource_Leadmanagement'

Set Actions:

- Send an Email
- Create a New Activity
- Modify field Values for Item (Set source Dropdown = Lead Management)

	Solo Donio Doug of Cattoll Alert		
ert Type:	Opportunity 'On-Save' - Created by Eddie Wi	hite on 22/05/2012. Last updated by Eddie White on 22/05/2012.	
ert Text:	Demo Lead Creation Alert	- This is displayed to user when alert fires.	
tes:	Opportunity]	
		Alert Conditions - What causes	s this alert to `fire`?
<i>These c</i> Trigger Trigger	onditions will be evalua ted when th ese items a will fire when the item screated when update is from a particular source	re created or updated: Opportunity	
		Alert Actions - What to do when a	slert conditions are met?
Send an	Email	Alert Actions - What to do when a Email Object Owner -	alert conditions are met?
Send an Create a	Email a new Activity	Alert Actions - What to do when a Email Object Owner Configure and manage data settings	alert conditions are met? Test Opportunity Alert Template
Send an Create a Set field	Email a new Activity is in the record	Alert Actions - What to do when a Email Object Owner Configure and manage data settings Configure and manage data settings	alert conditions are met? Test Opportunity Alert Template
Send an Create a Set field	Email new Activity s in the record	Alert Actions - What to do when a Email Object Owner Configure and manage data settings Configure and manage data settings	alert conditions are met? Test Opportunity Alert Template

For more information on Alerting/Workflow please see your Account Manager or the Gold-Vision Administration Console Guide.

Assigning Leads for Lead Progression



View → Leads → List Control - view the imported lists, manage the list, make it available and assign Leads.

New - Home -	View -	Tools -	Favorites Recent
Home Page Cu	Acco Cont	acts	Sales Reports
Contacts: My	Lead	is 🕨	All Leads Team Leads
Name	Activ	rities 🔸	My Leads
#NAME?	Sales	s → ortunities →	DascList Controlar Ltd
A Clark	Quot	tes 🕨	Pending Promotions
Adrian Wilson	Prod	ucts 🕨	Lead Campaigns
Adrian Wilson			11110

The list of imported lists will be displayed.

Gold-Vision			🍼 🗊	6	🕹 🔨		3	V		
New - Home - View - Tools	Favorites - Recent - Help -	Alerts: <u>1</u> To Do: <u>20</u>	Email: 0 ≜				Accounts	•		Sec. 1
List Control: All View:	🛛 List 🕼 Report 🛄 Calendar 👌	8						Action	: 🐣 Print	☆ Favorite
A 7	A	A	A	A . V	🔺 🔻		A 7			Ψ
Summary	View Leads	Manage List	Owner	-	Created Date	-	Total Records	-	Status	•
	<u>ر</u> ۵		٩	ΣQ	Select a date			Σ۹	Open	-
Exhibition Leads	View Leads (44)	Manage List	Q Nikki Bugla	ΣQ	Select a date 31/05/2012 09:35:02			Σ Q 44	Open V	-
Exhibition Leads Export A	View Leads (44) View Leads (1044)	Manage List	Q Nikki Bugla Nikki Bugla	Σ۹	Select a date 31/05/2012 09:35:02 25/05/2012 14:20:23			Σ Q 44 1044	Open	×
Exhibition Leads Export A Leads F	View Leads (44) View Leads (1044) View Leads (43)	Manage List Manage List Manage List	Q Nikki Bugla Nikki Bugla Nikki Bugla	Σα	Select a date 31/05/2012 09:35:02 25/05/2012 14:20:23 25/05/2012 11:18:18			Σ Q 44 1044 43	Open V	•

Each Lead import is managed independently by clicking the Manage List link from the list

Lead Management	t v							Edit	Un	do	Clo	se
Summar	y: LM Exhibition List				List O	wner:	Jiqqy Kei	th				4
Total Lead	s: 18	<u>۵</u>			List St	atus:	Open (L	eads E	Editable)	Ŧ	j
Total Promote	d: 0 (0 %)	۵		/	Access N	lode:	Private (User-L	_evel)		Ŧ]
Total Claime	d:0 (0 %)	<u>۵</u>		Pro	motion N	lode:	Anyone				Ŧ]
Assign Leads 👻											Assi	gr
▲ ▼		A V		A 1	r		A . Y					r
Summary 🔻	Record Team C 🔻	Record Owner	▼ Sta	tus	•	Callb	ack date	•	Discar	ded F	romot	ed
٩	ΣΩ	Σ	: Q		Q	Selec	t a date	. •	No	-	٥V	•
Billy Idol (Atlantic Gr	-	-	-			-			-		-	
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Cliff Richard (Avrian	-	-	-			-			-		-	
David Bowie (TSK I	-	-	-			-			-		-	
Elvis Presley (Avrian	-	-	-			-			-		-	
Gary Barlow (GB En	-	-	-			-			-		-	
Gloria Estafan (GB	-	-	-			-			-		-	
Janet Jackson (Ape	-	-	-			-			-		-	

List Control - Lead Management Settings

List Owner By default this is the user who imported the data, although ownership can be changed to another user by clicking Edit and using the lookup user icon.	Edit Undo Close List Owner. Nikki Bugla List Status: Open (Leads Editable) Lookup user
Editing is restricted to the Owner of the list (and a Gold-Vision System Administrator) who will have overall control of the list.	
List Status - Open by default	Save Undo Close
Open - Leads are visible to Lead Management Users Closed – Leads are hidden.	List Owner: Nikki Buqla Q List Status: Open (Leads Editable) Access Mode: Open (Leads Editable) Closed (Leads Hidden) Promotion Mode: Approval Required (by List Owner) \checkmark
Access Mode (Public/Team/Private) –	
 Private - by default. Similar to the main Gold- Vision Account security. Public - all users can see all Leads. Private - users can only see Leads which have 	Save Undo Close List Owner: Nikki Buqla Q List Status: Open (Leads Editable) ✓ Access Mode: Public (Free-for-All) ✓ Promotion Mode: Public (Free-for-All) ✓ Private (User-Level) ✓
been allocated to them.	
Team - users can only see Leads which have been allocated to the Team to which they belong	

Promotion Mode - (Anyone/Approval Required)	Save Undo Close
nequiled)	List Owner: Nikki Buqla
Anyone by default	List Status: Open (Leads Editable)
	Access Mode: Public (Free-for-All)
Use this to determine whether any User can promote Leads (to Gold-Vision) or whether they require approval by the list owner.	Promotion Mode: Approval Required (by List Owner) Anyone Approval Required (by List Owner)
Lists can be deleted by the List Owner or the System Administrator	Print Summary: Delete Total Leads: Close tal Promoted:

Assigning Options - Assign to an Individual

You may wish to filter Leads. For example you may want to assign all leads from a particular country to an individual user.

Change the column heading to **Country** and enter (for example) USA.

Click Assign



eads are re-assigned Click Go You will now see the Record ecord will indicate how ma	Owner and the Record ny Leads have been clai	Team Owner for each Lead.	ok The Lead Management
Lead Manageme	ent 👻	Edit	Undo Close
Summa	ry: LM Exhibition List	List Owner: Jiggy Keith	Q
Total Lead	ls: 18 🔴	List Status: Open (Lea	ds Editable) 🔻
Total Promote	ed: 0 (0 %)	Access Mode: Private (Us	ser-Level)
Total Claime	ed: 3 (16 %)	Promotion Mode: Anyone	-
Assign Leads 👻			Assign
▲ ▼	A V A V		A V A V
Summary -	Record Team Record Owner	Country - Callback date	 Discarded Promoted
Q	Σ۹	E Q <mark>usa Q</mark> Select a date	📑 No 🔻 No 🔻
Billy Idol (Atlantic	Southern Sales Alison Turney	USA -	
Sheryl Crow (Atlan	Southern Sales Alison Turney	USA -	
Toyah Wilcox (Atla	Southern Sales Alison Turney	USA -	

Assigning Options - Assign to a Team

	nn neading	to	lown and er	iter a Town						
ick Assign										
A	Assign Leads	•							Ass	ign
	A V		A V	A V	<u> </u>	•	A V		• •	•
	Summary	-	Record Team 🔻	Record Owner	Town / city	/ •	Callback date	 Disca 	rded Prom	oted
		Q	Σ۹	ΣΟ	birm liverp	ool 🔍	Select a date	🧧 No	▼ No	•
F	Robbie Williams	(·		-	Birmingha	m	-	-	-	
ŀ	(ylie MiFALSEgu	e ·		-	Birmingha	m	-	-	-	
K	(ate Bush (BBT	n ·		-	Birmingha	m	-	-	-	
J	oe Jackson (As	p •	-	-	Liverpool		-	-	-	
N	lariah Carey (As	p •		-	Liverpool		-	-	-	_
elect Assign t elect a Team f n the Admin Co f you wish to a eam (rather th	o a Team from the dr onsole) ssign to inc an make th	opc livio ne L	lown (teams dual membe eads availab	are set up rs of the ole to any		old-Vision sing this c cords: 5 Assign Assign to: Assign Assign	Message control you can assi to a Use @sisi No-one (Remove T Administrators Northern Sales Southern Sales	gn up to the f ign to a Team Team) - (eam) st ers	Assign to In	iber of filtered dividuals ds v

Select Assign All records of percent Click Go	r a certain num	iber or	Gold-Vision Message Using this control you can assign up to the following number of filtered records: 5 Assign to a User				
Leads will be assigned to t	he members o	f the team.	Assi Assi F	gn to: Northern Sales ssign All 5 Records C orce overwrite/replace e	Cancel	cords	
Assign Leads 👻						Assign	
A . Y	A 7	A 7	• •	A 1		A ¥	
Summary 💌	Record Team 🔻	Record Owner 💌	Town / city	 Callback d 	date 🔻 Discarded	Promoted	
٩	Σ۹	Σ۹	birm liverpoo	I 🔍 Select a da	ate 📑 No 🛛 🔻	No 🔻	
Robbie Williams (Northern Sales	Charlie Shaw	Birmingham	-	-	-	
Kylie MiFALSEgue	Northern Sales	Eddie White	Birmingham	-	-	-	
Kate Bush (BBT In	Northern Sales	Mark Vernon	Birmingham	-	-	-	
Joe Jackson (Asp	Northern Sales	Sam Berey	Liverpool	-	-	-	
Mariah Carey (Asp	Northern Sales	Simon Lang	Liverpool	-	-	-	
If the records are not assigned to individuals, (i.e the box is not ticked) they will be available to any men of that team to work on. The Access Mode will need to be set to Team for users to be able to see these Leads Assign Leads - Assign							
	A	A V	<u> </u>		• • •	▲ ▼	
Summary	Record Team 🔻	Record Owner	Town / city	 Callback (date 🔻 Discarded	Promoted	
Q		Σ۹	bourn/welwy	n 🔍 Select a da	ate 🤗 No 🔫	No 🔻	
Cliff Richard (Avria	Southern Sales	-	Bournemouth	1 -	-	-	
Elvis Presley (Avri	Southern Sales	-	Bournemouth	1 -	-	-	
David Bowie (TSK	Southern Sales	-	Welwyn Gard	len	-	-	

List Owner

A list owner (and a Gold-Vision system administrator) can change the settings of the list (Owner, Status, Access Mode and Promotion Mode) and assign ANY Leads.

If Promotion Mode is set to Approval Required only the List Owner can promote to Gold-Vision

Team Leader

A Team Leader can assign Leads for their Team but cannot change the settings (unless they are also the List Owner). Please note if anyone assigns Leads outside of their security remit they may lose assignment rights.

Managing your Sales Leads



Gold-V	ision	
New - Home -	View Tools F	avorites 🔹 Recent
Home Page	Accounts Contacts	
Favorites: My	Appointments	All Leads Team Leads
Summary	Activities Sales	My Leads My Call-backs
Allans	Opportunities Quotes Products	Lead Management Pending Promotions

- All, Team, My Leads Takes the user to the respective tab of the general Leads view.
- Call-backs Takes the user to the call-backs tab where they can see their scheduled call-backs. This process is described below.
- Lead Management Takes the user to a list of Lead imports where individual lists can be viewed and managed
- Pending Promotions Lists any Lead promotions that are pending if the system has been configured where promotions have to be completed by a different user than the record owner.
- Leads Mail Shots Shows any Lead-based mail shots that have been sent through Connect.

Viewing Leads - all Leads

View \rightarrow Leads \rightarrow All Leads.

The Leads 'quick access' screen is displayed by default when you access a list of Leads or can be accessed by clicking the 'Quick' tab at the top of the list under the 'View' tab-group. The Lead screen is split into two main areas – see screenshot below.

LM Exhibition Leed: All Team My Ca	III-backs View: List	Report 🛅 Quick 💩			Action: 🕀 島 🏠			
		show sort and filter controls \$						
LM Exhibition Leed Records 1 to 17 of 17 (Page; 1)	Lead 🗸				Edit Undo 🔶			
My Leads Actioned Today	🗢 Prev 🛛 Next 🔿 🖂 Ema	ail 🕘 Call 🗸 Claim 🕜 Prom	ote 🔍 📎	Discard X Delete				
Today 0/5 Week 0/25 2 3	Status / Outcome: Not Set		Find	d other Contacts at Atlantic Group Inc.				
Month 0/100 0 5	You have been flagged as work	ting on this Lead for now. To keep or prom	te it please <u>c</u>	laim this Lead.				
14 Eirst Parie	His record is potentially a dupl	This record is potentially a duplicate. Duplicates found: 1. Duplicate Score: 40. <u>Review potential duplicates</u> .						
Pilly Idel (Atlantic Crown Inc.)	No-one owns this Lead. Claim	this Lead?						
	✓ Details							
Billy Joel (GKM Transformation Ltd)	Summary:	Billy Idol (Atlantic Group Inc.)	A					
	Company:	Atlantic Group Inc.						
Cliff Richard (Avrian Logistics Ltd.)	Company Phone Number:	001 485 765 3300	<i>></i>					
David Bowie (TSK Informatics)	Web Domain:		<u>©</u>					
	Postcode:			email: bi@ag.co.uk				
Gary Barlow (GB Enterprises Ltd.)	Firstname:	Billy		Lastname: Idol				
·	Direct Phone Number:	001 485 765 3302	I	Mobile Number: 001 7786 998 7687	a			
Gloria Estafan (GB Enterprises Ltd.)	Industry:			Number Of Users:				
Janet Jackson (Aney Systems Ltd.)	Created Date:							
Next Page ▷	Decision:				-			

Actioned Lead Performance - A summary of Lead performance in terms of number of Leads 'actioned' by the user against their 'target' as defined under the Admin Console. (Please see Lead management setup guide to see how to set user targets). (Actioned Leads are Leads where the outcome has been updated or a note has been added)

Timers- if the Lead belongs to the current user

	Le Records 1 to :	ads 18 of 493 (Page: 1)
My Leads A Today Week Month 00:08 II	ctioned 1/5 20/25 20/100 01:15	Today

Timer on the **left** is the amount of time spent on this Lead in the current session

Timer on the **right** is the total time spent on this Lead in total. (This can be disabled in the Admin Console)

N First Page	
Billy Idol (Atlantic Group Ir	nc.)
Billy Joel (GKM Transforn	nation Ltd)
Cliff Richard (Avrian Logis	stics Ltd.)
David Bowie (TSK Inform	atics)
Gary Barlow (GB Enterpri	ses Ltd.)
Gloria Estafan (GB Enterj	prises Ltd.)
lanet lackeon (Anex Svet	tame I trl)
Next	! Page ▷

Lead List Preview - Leads themselves along with paging controls to move forward or backward through the list.

Leads in **GREEN** are Leads where you are the owner of the Lead.

	Edit Undo
🗢 Prev Next 🔿 🖂 Email 🚳 Call 🗸 Claim 🗇 Promote	ℑ Discard X Delete
Status / Outcome: Not Set	Find other Contacts at Atlantic Group Inc.
() You have been flagged as working on this Lead for now. To keep or promote it plea	se claim this Lead.
This record is potentially a duplicate. Duplicates found: 1. Duplicate Score: 40. Review	ew potential duplicates.
No-one owns this Lead. <u>Claim this Lead?</u>	
✓ Details	
Summary; Billy Idol (Atlantic Group Inc.)	
Company: Atlantic Group Inc.	
Company Phone Number: 001 485 765 3300	Þ
Web Domain:	Þ
Postcode:	email:bi@ag.co.uk
Direct Phone Number: 001 485 765 3302	Mobile Number 001 7786 998 7687
Industry:	Number Of Users:
Created Date:	
Decision:	
inactive. Call - Click to dial the number for the Lead (requires number it will pick a number in the following order – number fields are blank the tab will be inactive)	phone system integration - if there is more than one -contact phone, main phone, mobile, . If all phone
Call Back - Allows the user to save a date and time to under the 'Call-backs' tab	call the Lead back. This will make the Lead appear
Promote - Displays the promotion control.	
Discard – If no linger wish to be the owner of the Lea flags it as "discarded".	ad this action removes ownership of the Lead as well as
Delete - Deletes the record completely.	
Status / Outcome, This allows the way to guiddly	
record the current state or stage of the relationship. Options can be selected from a list (configured in the Admin Console) and will save automatically, but may be manually overtyped if set up to allow users to do so. Click in the outcome field, overtype and select Save Status.	Lead ▼ ↓ Prev Next ↓ Email ② Call ✔ Claim ③ Discard ✗ D Status / Outcome: Do Not Contact - Not interested ⑧ You have been Hide ⑧ No-one ownst Invalid Number ▷ Do Not Contact Do Not Contact ♥ Details Do Not Contact □ Call Back E

Gold-Visi	ion Message				
Potent	ial Colleagues	Filt	er: 📝 🦤 Gold-Vision Cor	ntact 📝 📃 Same List 🛽	🛛 🗐 Other List 👿 ⊘ No Access
Source	Name	Company	Job Title	Status	Owner
	Sheryl Crow	Atlantic Group Inc.	Procurement Manager	Not Set	None (Claim Discard)
	Toyah Wilcox	Atlantic Group Inc.	IT Director	Not Set	None (<u>Claim</u> <u>Discard</u>)
Source of Gold-Vi Same lis Other L No acce Unclain this link A note i Lead ha	of the other Conta ision Contact – th st – identifies pot ist – identifies po ess – identifies po ned Leads can be is added as confirmed. Is been claimed.	acts is indicates potent ential duplicates in tential duplicates tential duplicates claimed by clickin mation that the	tial duplicates in you n the same importe in any imported list in a list which you d g @ No-one owns thi Gold-Vision Message Claim this Lead? You will ~~~ 03/04/2012 14:1	ur main Gold-Vision d list o not have access to s Lead. <u>Claim this Lead?</u> become the owner. OK Cancel 1 - Nikki Bugla ~~~ Lead cla) aimed by Nikki Bugla
If Leads	are owned by an	other User, this w	ill be displayed and	you will not have ac	cess to the above tabs.
Lead 👻					
🗣 Prev	Next ⇒				
Status / Ou	tcome: Not Set		Find other Contacts		
× This red	cord is owned by someone else:	Tim Beresford			

List Tabs

Gold-Vision		V	ŋ
New * Home * View * Tools * Favorites * Recent * Help * Alerts: <u>1</u> To Do: <u>20</u>	Email:	0	
Leads: All Team My Call-backs View: List M Report 🔂 Quick 🔅			
¢ sho	w sort and filte	er controls 🗢	

Leads:

All Leads you are allowed to see. Leads can be made private when imported which will only be visible by the Lead owner.

Team - Leads owned by the team you are a member of

My - Leads owned by you

Call Backs – Leads you have set a Call-Back for (see below for more details about Call-backs)

View:

List - standard Gold-Vision list view

Report – create and view charts and reports

Quick – default view of Leads as above

Show sort and filter controls – Depending on the size of your screen you may not be able to see the column heading, clicking this will show the column heading to enable you to search for Leads

hoo Gold	l-Vision						%	Ŷ	Ø	Ø	\$	~		2	• ع	*		4
New - Home	e view T	ools 🔹 Favorites	* Recent	Help	Alerts: <u>1</u>	To Do: <u>20</u>	Email: <u>0</u>	≜						Accourt	its ·	-		Q
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Summary		Status/Outcome		List Name	-	First Name		-	Last Name	9	•	Company Na	ne	-	Discarde	ed 🔻	Promoted	•
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9____

Toggle main icon bar. Clicking this icon removes the Gold-Vision Icon Bar; this will allow you to view a larger Lead record on the screen.





New – Create a New Lead

Print – Print the current Lead

Favorite – create a Favorite list of Leads by filtering from the list view.

Mail Shot – If you are a Gold-Vision User and have access to creating Campaigns you will see this tab. You can upload the filtered list of Leads to Connect (you will need to be a Connect User) or create a telephone or letter Lead Campaign.

Duplicates

When Leads are first imported, and as changes are made in the system, Gold-Vision will automatically compare all Lead records for duplicates. Gold-Vision will search all imported Lead lists as well as main Account/Contact records for duplicate matches. If any duplicates are found then a red notification bar will be displayed against the record with a link to review the potential duplicates.

Duplicates are listed and scored based on specific rules, examples of these can be found in Appendix A and B. Records that the user has access to can be viewed, claimed or discarded according to the level of access and current ownership.

Duplicate Source: Gold-Vision Contact – this indicates potential duplicates in your main Gold- Vision database Same list – identifies potential duplicates in the same imported list Other List – identifies potential duplicates in any imported list No access – identifies potential duplicates in a list which you do not have access to	Gold/Vision Message Potential Duplicates Filter: Gold-Vision Contact © Other List © Other List
Click on the Gold-Vision Contact record to review further details. Actual duplicates can then be discarded or deleted.	
Other fields on the screen are configurable in	the Administration Console.
Notes Add a new note and click Save . Notes can be viewed as a list. When records are promoted to Gold-Vision the Notes will also be imported.	New Note: Save
Call Back If you are the owner of a Lead, the Call-back tab allows you to create a reminder to call the contact at a given date and time. Click on the tab and add the date and time for the call back. Click Ok.	Select a date X May 2012 Mo Tu We Th Fr Sa Su 30 1 2 3 4 5 6 Z 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 2 3 Time: 14 00 Ok Clear Today: 28 May 2012 14 14

The Call-backs tab shows a list of your Call- backs.	LM Exhibition Leed: All Team My Call-backs LM Exhibition Leed Records 1 to 2 of 2 (Page: 1) Lead Image: Comparison of the page Image: Comparison of the page My Leads Actioned Today Today 1 Today
When you have made the call click Remove Call-Back to remove from your list of call backs.	Lead ▼ Image: Prev Next Image: Prev Image: Status / Outcome: Call Back Image: Status / Outcome: Call Back Image: Vou are the owner of this record. Assigned by: Mark Vernon Image: Vou have set a call-back for: 02/05/2012 15:00. Remove call-back.

Promoting Leads

Leads can be promoted into the main Gold-Vision Account and Contact system by using the **Promote** control. There are two settings for this process –

- The List Owner needs to approve the promotion or
- Everyone can promote the record to Gold-Vision.

Option 1- Approval required (by the List Owner)

Click Promoto on the Load record	Gold-Vision Messa	age
	Promoting this Lea records. \Please note that the Continue to promo	ad will turn it into a Gold-Vision Account and potentially other his promotion will require approval by the list owner. bte Lead? Continue Cancel
The Lead Record is updated to show it is promotion.	pending	Lead → ← Prev Next → ⊠ Email
Click Cancel if you no longer wish this rec promoted.	ord to be:	Status / Outcome: Call 2 (Pending Promotion) This Lead is pending promotion by you. Cancel r You are the owner of this record. Assigned by: N

This record will appear on the Pending Promotions list for the List Owner to promote	lision View - Tools - Favorites - Recent
The List Owner can then Promote or Cancel the promotion request, see below.	Accounts Contacts Leads Appointments Activities Sales Opportunities Quotes Pending Promotions
Gold-Vision	
New * Home * View * Tools * Favorites * Recent * Help * Alerts: 0 To Do: 14 En	nail: 0_ ≜ Accounts ▼ O
Leads Pending Promotion: My View: List M Report Quick &	Action: APrint 公 Favorite Campaign
Leads Pending Promotion	Edit Undo 🔶
K First Page 4 Previous Page 4 Prev Next ⇒ ⊠ Email S Call S Pro	mote X Delete
Gloria Estafan (GB Enterprises Ltd.) LM Exhibition Leed 5 This Lead is pending promotion by Usmaan Razag, Cancer	Find other Contacts at GB Enterprises Ltd.
X This record is owned by someone else: Usmaan Razaq	

Option 2- Anyone can promote

When a user who has access clicks **Promote** they will be displayed the following three options.

- **Create New Account and Contact** Choosing this option creates a new Account (and Contact) in the main system. If configured this could then create a follow up activity or opportunity in Gold-Vision.
- **Merge with Duplicate** If potential Gold-Vision duplicates have been found the user may 'merge' their promotion with the existing item.
- Search and Merge This allows the user to manually search for an Account to merge with if one is known to exist.
- If Promotion mode is set to Approval Required, only the List Owner will have access to this.

Oreat	e a new Account and associated items
Choosing Vision. Ar be create f you wis below.	I this option will promote this Lead to become a new Account in Gold- ny associated items that were specified during the list import will also d. h to merge with an exsting record instead please choose an option
Merg	e with duplicate Account/Contact (0 found)
Sear	ch for an Account to merge with

Once a Lead has been promoted it is no longer editable within the Lead system, however, a link to the promoted Account is displayed Contacts will be created and Notes will be copied in the Account record

Lead 🗸	
← Prev Next →	
Status / Outcome: Duplicate? (Promoted)	Find other Contacts at A B Electrical & Security
	<u>cord.</u>
✓ You are the owner of this record. Assigned by: Mark Vernon	
✓ Details	

Searching for Leads

10 Gold-Vision							1	1	Ø				68	W	
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Lead Campaigns

Lead lists can be used for direct communications and either

- Uploaded to Gold-Vision Connect to be sent as a mailshot
- Used to create a telephone campaign
- Exported to Excel for use with Word Mail merge

You must have user access to Gold-Vision Campaigns to proceed.

Filter your list, click Campaign

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Option 1- Connect Mailshot



This will upload the recipients to Connect and create a new mail shot. (Please note: You must have an active Connect account and user access to Gold-Vision Campaigns.)

View \rightarrow Leads \rightarrow Leads Mailshots

The results of Connect mail shot opens, clicks and similar are automatically synchronised back to the Leads management system.

For more details please see the Gold-Vision Connect Tutorial.

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New - Home -	View Tools	Favorites * Recent
Leads: All	Accounts Contacts	I-backs View:
Summary	Leads 🔸	All Leads
	Appointments 🕨	Team Leads
	Activities 🕨	My Leads
Record	Sales 🕨	My Call-backs
My Leads Actione	Opportunities 🕨	Lead Management
Today 5/-	Quotes 🕨	Pending Promotions
Week 5/-	Products •	Leads Mail Shots

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Nikki Mailshot	Connect - Complete	Telemarketing	Mixed		17552		0	0	0	0

Ontion 2. Talankana Compaign	Gold-Vision Message
Option 2 - Telephone Campaign	Create a Campaign from these Leads?: 4
Filter your list, click Campaign	Name: Telesales - Birmingham Area
	Type: Telesales -
Enter a name for your mailshot	Medium: O Connect Email
Select a Type	Create Cancel
Select Letter/Telephone	
Click Create	Gold-Vision Message
	Your Campaign has been created.

Working on the Telephone Campaign

View \rightarrow Leads \rightarrow Leads Campaigns

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Option 3 - Word Mail Merge

Use the Gold-Vision reporting functionality to create a word mailmerge.

ilter your list and click Campaign		Gold-Vision Message			
Enter a name	Create a Name:	mail shot from these Leads?: 14 Aberdeen Press Release			
Select a Type	Type: Medium:	Account management Connect Email			
Select Letter/Template		Letter/Telephone Create Cancel			
Click Create					

View \rightarrow Leads \rightarrow Leads Campaigns	Gold-Vision
Select your Mailshot, select the Report Tab, click Create a Report.	New * Home * View * Tools * Favorites * Recent * Help * Alerts: 1 To Do: 20 Aberdeen Press Release: All Team My Call-backs View: Ist List Main Report
	Add Items to this View.
Enter a name for the Report , click OK Edit the the report record to include the fields you require, click save.	Gold-Vision Message Please enter a name for this report and choose an option below. Aberdeen Press Release Image: Save a new report for editing. Image: Run a one-time report without saving. Image: Ok Cancel
To run the report to CSV click Report → Export to CSV. This file can then be used for Word Mail Merge. See the Gold-Vision Campaigns Tutorial or Help Site for full details.	Run Report Run Chart Export to CSV Copy

Glossary

Lead	Contact information for a potential customer
Team Leader	User with access to allocating Leads to members of their team. More than one user can be a Team Leader
List status	Lists are either Open or Closed
Open list	Open lists – Leads are visible to users
Closed list	Closed lists - Leads are hidden
List owner	The user who imported the data, although this ownership can be changed to another user.
	If Promotion mode set to Approval Required, only the List Owner can promote leads
De-duplication process	Lead Management has some advanced de-duplication facilities, and checks incoming data for duplication within the imported list, between imports and in Gold-Vision. This does mean that an imported list is not available to be worked on until the de- duplication process is complete. The Leads will not be visible for use until the de-duplication process is complete.
Duplicate Leads	Gold-Vision will highlight potential duplicates with your Gold-Vision CRM and imported lists.
Promoting a Lead	The action of adding the Lead/contact to your Gold-Vision
Pending promotion	The list can be set up so that promotions need to be approved by the list owner
Claiming a Lead	If a Lead does not have an owner you can claim the Lead by clicking claim this Lead link in the Lead record
Discarding a Lead	If you no longer wish to deal with a Lead, you can discard it; this process removes you as the owner and flags the Lead as discarded. This Lead can then be claim by other users.

Appendices

Appendix A

- Similar company name and matching postcode. Score: 35
- Matching website. Score: 40
- Similar company name and similar contact name. Score: 35
- Matching contact phone number. Score: 40
- Matching contact email: Score: 50
- Similar company name and matching town. Score: 20
- Similar company name and phone number. Score: 30

The "stars" are linked at half a score per score of 5. So 50 = 5 stars, 10 = 1 star, 35 = 3.5 stars. Custom rules can be added to give higher than a score of 50 but the start score will still be 5. "Similar" means soundex (<u>http://en.wikipedia.org/wiki/Soundex</u>).

Appendix B

De-duplication Examples and Scoring

Web Domain

Score: High Level: Account Two records have the same website text once http://, https:// e.g. *"http://www.gold-vision.com"* is a duplicate of *"gold-vision.com"*.

Company Soundex & Town

Score: Low

Level: Account

Two records have the same Soundex of the Company name once spaces and non-alphabetical characters are removed and the same Town name.

e.g. The following records would be flagged as duplicates:

Company Name	Town
Gold-Vision	West Haddon
Gold Vision (Esteiro)	West Haddon

Company Longest Word & Town

Score: Low

Level: Account

Two records have the same Longest Word of the Company name and the same Town name.

e.g. The following records would be flagged as duplicates:

Company Name	Town
Esteiro Gold-Vision	West Haddon
Gold-Vision	West Haddon

Company Soundex & Postcode

Score: Low

Level: Account

Two records have the same Soundex of the Company name once spaces and non-alphabetical characters are removed and the same Postcode once spaces are removed.

e.g. The following records would be flagged as duplicates:

Company Name	Postcode
Gold-Vision	NN6 7NY
Gold Vision (Esteiro)	NN67NY

Company Longest Word & Postcode

Score: Low

Level: Account

Two records have the same Soundex of the Company name once spaces and non-alphabetical characters are removed and the same Postcode once spaces are removed.

e.g. The following records would be flagged as duplicates:

Company Name	Postcode
Esteiro Gold-Vision	NN6 7NY
Gold-Vision	NN67NY

E-mail Address

Score: High

Level: Contact

Two records have the same e-mail address. If the address in Gold-Vision contains the text " (duplicate e-mail)", this is removed before the comparison. Also, the e-mails are only compared if they are valid (i.e. contain "@").

e.g. "smanderson@gold-vision.com" matches "smanderson@gold-vision.com (duplicate e-mail)"

Contact Phones

Score: High

Level: Contact

Two records have the same phone number recorded as either the contact's main phone number or mobile phone number. A duplicate is not flagged if the number in question matches the Company phone number, as this is an indication that the number is repeated and it is assumed the contact records belong to the same company but are separate contacts.

Before the phone numbers are compared, spaces and non-numerical characters are removed. The last ten characters of the phone number are used for comparison.

e.g. Some examples of where duplicates would be flagged:			
Contact Phone	Contact Mobile	Company Phone	
+44 (0)1788 123456	07224 325898	01788 511110	
01788 123456	07456 481354	01788 515423	

Contact Phone	Contact Mobile	Company Phone
+44 (0)1788 123456	07224 325898	01788 511110
+44 (0)7224325898	07456 481354	01788 515423

An example where duplicates would not be flagged:

Contact Phone	Contact Mobile	Company Phone
01788 511110	07224 325898	01788 511110
01788 123456	01788 511110	01788 511110

Contact Soundex & Company Soundex

Score: Medium

Level: Contact

Two contact records have the same Contact First Name soundex, Contact Last Name soundex and Company name soundex. All the soundexes are based on the value with spaces and no alphabetical characters removed.

e.g. "Robert Edward Gray" at "Gold-Vision" is a duplicate of "Robert Gray" at "Gold Vision (Esteiro)"

Company Phone

Score: Low

Level: Company

Two contact records have the same Company Phone Number once spaces and non-numeric characters are removed. The comparison is performed on the last ten characters making up the phone number. e.g. "+44 (0)1788 511110" is a duplicate of "01788 511110".

Appendix C

Default imported fields

Onscreen by default

Summary Company Main Phone Website Post/Zip Code First Name Last Name Contact Phone Mobile Email

Available Fields

Title Job Title Address 1 Address 2 Address 3 Town/City County/State Country Main Fax Promoted Discarded Duplicate Score Duplicate Count Owner Created Date Created By Updated Date Updated By Assigned Date Assigned By Last Action Date Last Action By Assigned By