

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

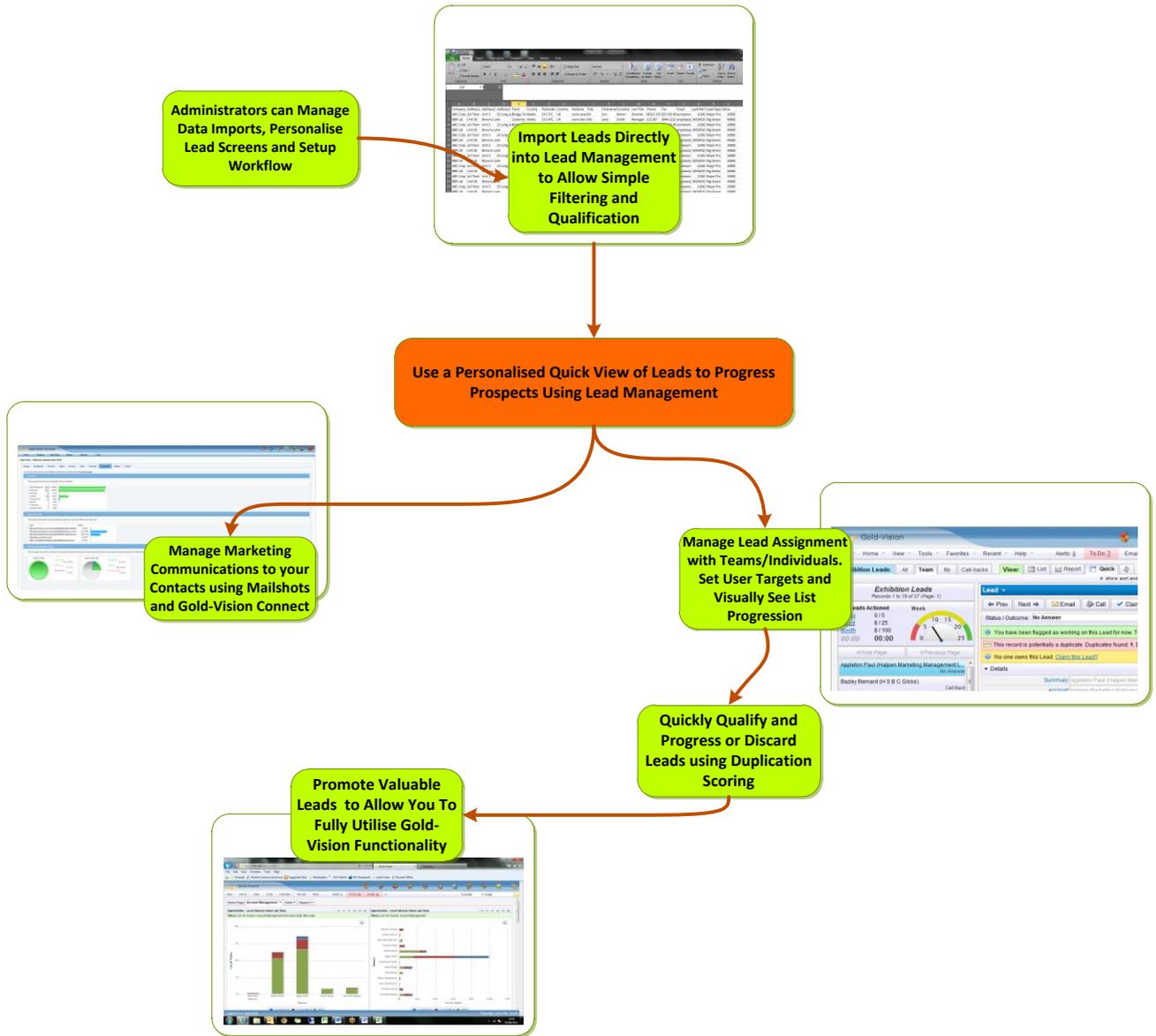
However, there is still an all-important link with your other data. Gold-Vision Lead Management runs de-duplication processes with the core CRM data and with data from other list sources, providing an additional level of control, without sacrificing the freedom to act. On the other hand, having the resource 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.

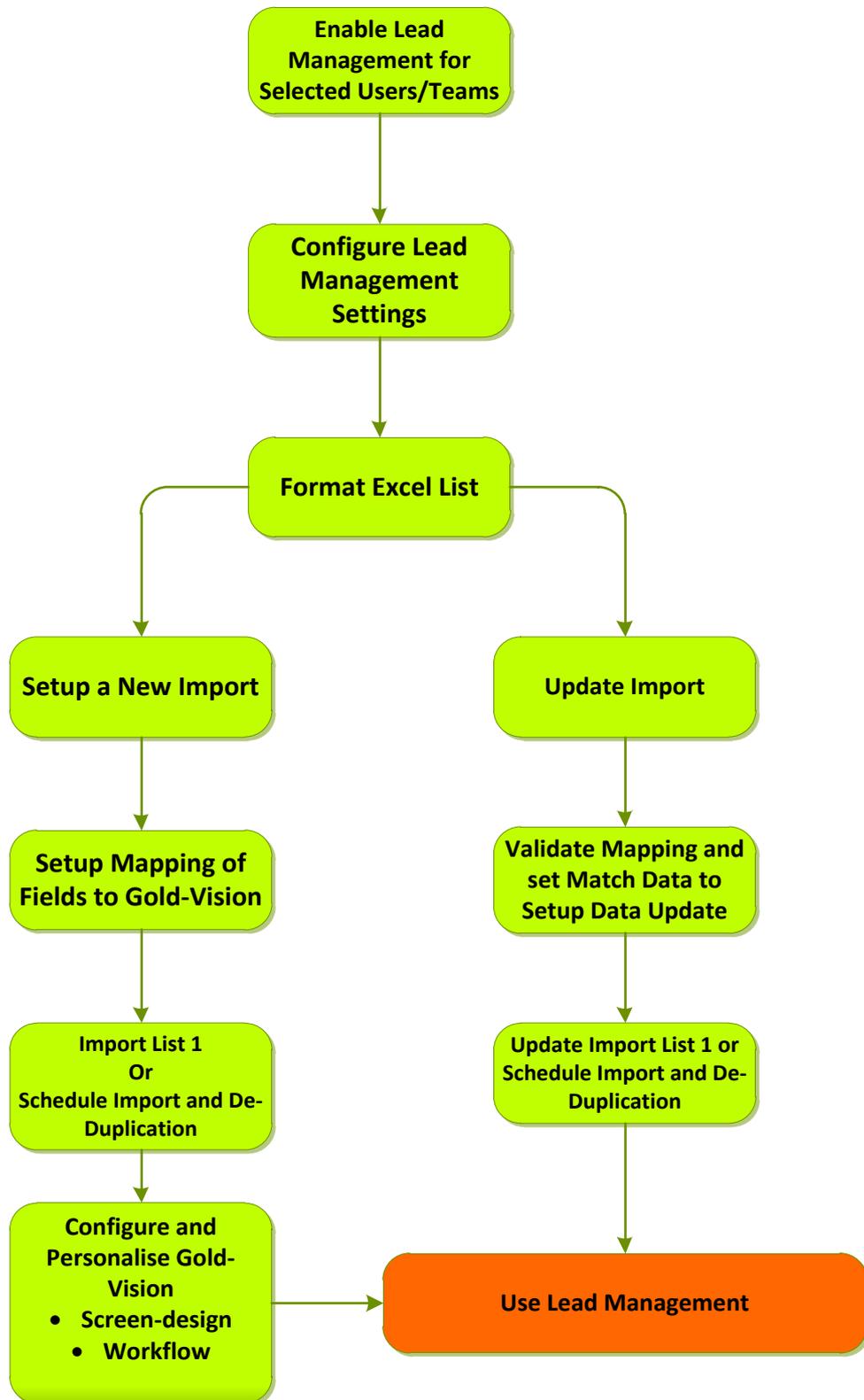
For data with a known provenance and quality, there is the same powerful integration with our Connect e-marketing solution for mailshots, and the response information is captured automatically in Lead Management. Of course, when a business relationship reaches the next stage, simply promote the record 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 licencing limits. When you are finished, click 'Save' to update the changes.

	Accounts	Contacts	Emails	Activities	Appointments	Profiles	Reports	Dashboards	Leads	Outlook Sync
Administrators (4)	<input checked="" type="checkbox"/> Access									
	<input checked="" type="checkbox"/> Edit									
	<input checked="" type="checkbox"/> Delete									

Enable Lead Management Services will need to be ticked
Data → Lead Management → Lead Management Settings (see below for more details on settings)



Licences

Access to Lead Management is on a licenced user basis. When enabling Lead Management users (see below) you should consider the number of licences available. This can be checked via: **Settings → Licencing**.

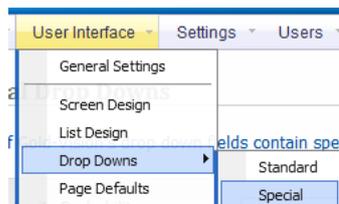
Please contact your account manager if additional licenses are required.

You can update existing users to allow access Lead Management.



Lead Management Outcomes

The drop down options for Lead Status/Outcomes can be adjusted via the menu



Edit – click on a dropdown and edit as required

New – a new outcome can be added

Delete – select an option and delete

Click **Save**

Special Drop Downs

A few of Gold-Vision's drop down fields contain special or restricted values. These can be configured

Lead Status/Outcomes One per line	No Answer Invalid Number Do Not Contact Wrong Contact Call Back Not Interested Duplicate? Call 1
---	---

Save

User Access Leads Setting: Specific Users will then need to be granted access to the Lead system via the Access Leads checkbox on the user screen.

User - Nikki Bugla

This is a Gold-Vision User. This user is a Configuration Manager. Configuration Managers can access the Gold-Vision Administration Console and make any system-wide changes they have access to as defined under the 'User Access Options' page.

First Name: Nikki	Middle Name:	
Last Name: Bugla	Email:	
Job Title:	Phone:	
Department:	Mobile:	
NT Account: esteiro\inkbugla	Simple View Menu: <input type="checkbox"/>	Show on User List: <input checked="" type="checkbox"/>
Primary Team: Management Team	Access Preferences: <input checked="" type="checkbox"/>	Show on AC Managers: <input checked="" type="checkbox"/>
User Level: Configuration Manager	Access Mobile: <input type="checkbox"/>	Show on Support List: <input checked="" type="checkbox"/>
External ID:	Access Leads: <input checked="" type="checkbox"/>	Mobile Password:

Team Leader: A Team Leader can assign Leads when a list is set to Team or Public.

Team Leaders can be set up via the **Users → Team Membership** menu.

Select **View team membership** as a list.

Team Memberships

Gold-Vision teams serve two purposes: Firstly they allow for users to be grouped together and secondly they are used for security purposes. When an account security group is set to 'Team' it can only be accessed by the account manager, the account manager's team plus any members/teams which have been given access through the memberships page. By adding a 'Secondary' membership for a user to another team the user will be entitled to access the 'Team' accounts owned by members of that team. For more information on security and teams, please contact support. **View team memberships as a list**

Drag and drop users to manage team memberships.

- Primary Membership - Secondary Membership - Gold-Vision Team - Gold-Tracker Team - Team Leader

Administrators Andy Calvert Tim Beresford Usmaan Raza (*)	Executive Charlie Shaw Steve Hampshire	Management Team Andrew Fiendley Mark Vernon Nikki Bugla (*) Charlie Shaw X	Technical Development Sean Anderson	Accounts
---	---	---	---	-----------------

Tick the **Team Leader** box.

Team Members

Team Name	User Name	Email Address	NT Account	Primary Team	Team Leader	Remove
southern sales				All	All	
Southern Sales	Tim Beresford	-	esteiro\tsberesford	✓	<input checked="" type="checkbox"/>	⊗
Southern Sales	Nikki Bugla	nkbugla@esteiro.co.uk	esteiro\inkbugla	✓	<input type="checkbox"/>	⊗
Southern Sales	John George	-	esteiro\jgeorge	✓	<input type="checkbox"/>	⊗
Southern Sales	Jiggy Keith	-	esteiro\jkeith	✓	<input type="checkbox"/>	⊗
Southern Sales	Alison Turney	-	esteiro\amturney	✓	<input checked="" type="checkbox"/>	⊗

Lead Management Settings

Data Documents LiveUpdate Help

- Database Details
- Merge
- Un-Delete
- Apply Script
- TPS Import
- Import
- Outlook
- Lead Management
 - Lead Management Settings
 - Deduplication Jobs

There are checkboxes to control the behaviour of Lead Management options.

Import Data Summary Style – chose the format of the Lead summary from the dropdown

Disable Timer – Tick to disable the timer on the Lead Management Screen.

Disable Timer Pause Button – Tick to disable the Timer Pause Button on the Lead Management Screen

Disable Free-Text on Status – Tick to prevent Users from entering free text on the Lead Outcome/Status

Lead Management

Enable Lead Management Services:

Import Data Summary Style: Firstname Lastname (Company Name) ▾

Disable Timer:

Disable Timer Pause Button:

Disable Free-Text on 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:

Maximum Single Deduplication Processes:

Deduplication Procedure Timeout (seconds):

Deduplication Poll Interval (seconds):

Maximum Asynchronous Records:

Reserved Threads:

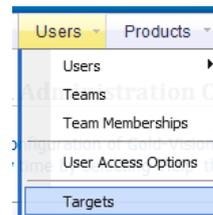
Disable Deduplication on Save:

Save

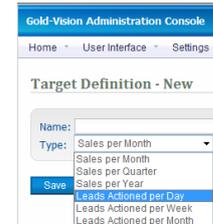
De-duplication Jobs Shows a list of imports and the status of the de duplication process.

Summary	Scheduled Start	Actual Start	Completed	Created	Status	Records	Select
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	<input type="checkbox"/>
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	<input type="checkbox"/>
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	<input type="checkbox"/>
Export F	24/05/2012 16:04:27	24/05/2012 16:04:27	24/05/2012 16:04:27	24/05/2012 15:39:22	Complete	719	<input type="checkbox"/>
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	<input type="checkbox"/>

Setting User Targets:



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



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 **not** 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)

	A	B	C	D	E	F	G	H	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	M	N	O	P	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.

Screen One:



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

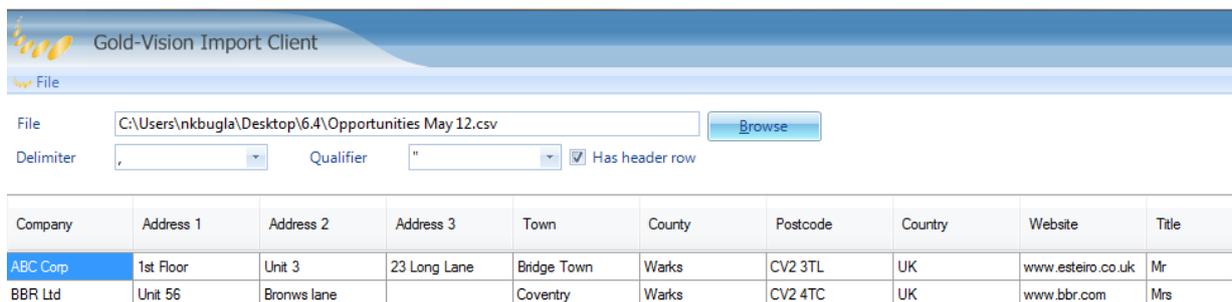
Screen Two:

Click **browse** and select your file.



Screen Three:

A preview of your file is displayed to allow you to check that the columns are correctly formatted.



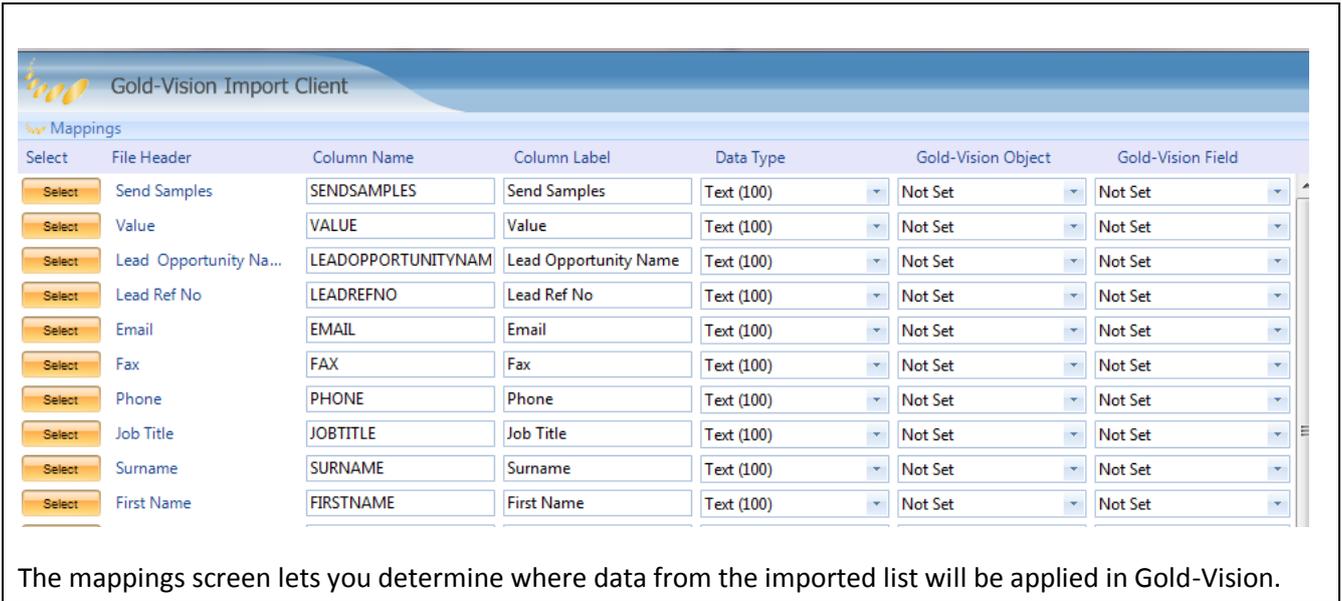
If the Data format looks correct click **Next** at the bottom of the screen.

Mapping

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

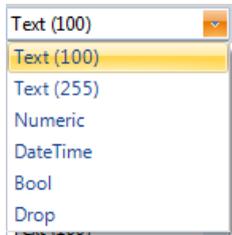
(The key difference between the Lead Management import and the standard Gold-Vision import is that there is an extra function to map the import fields to relevant Gold-Vision fields. This is required to allow an automated promote function.)

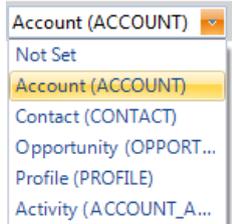
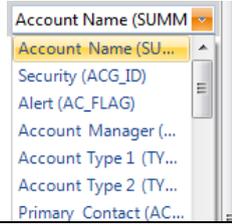
Screen Four: Setup Mappings



The screenshot shows the 'Mappings' screen in the Gold-Vision Import Client. It features a table with the following columns: Select, File Header, Column Name, Column Label, Data Type, Gold-Vision Object, and Gold-Vision Field. The table lists various fields from an imported file and maps them to Gold-Vision objects and fields. Each row has a 'Select' button on the left. The fields listed are: Send Samples, Value, Lead Opportunity Name, Lead Ref No, Email, Fax, Phone, Job Title, Surname, and First Name. The Gold-Vision Object and Field columns are currently set to 'Not Set'.

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

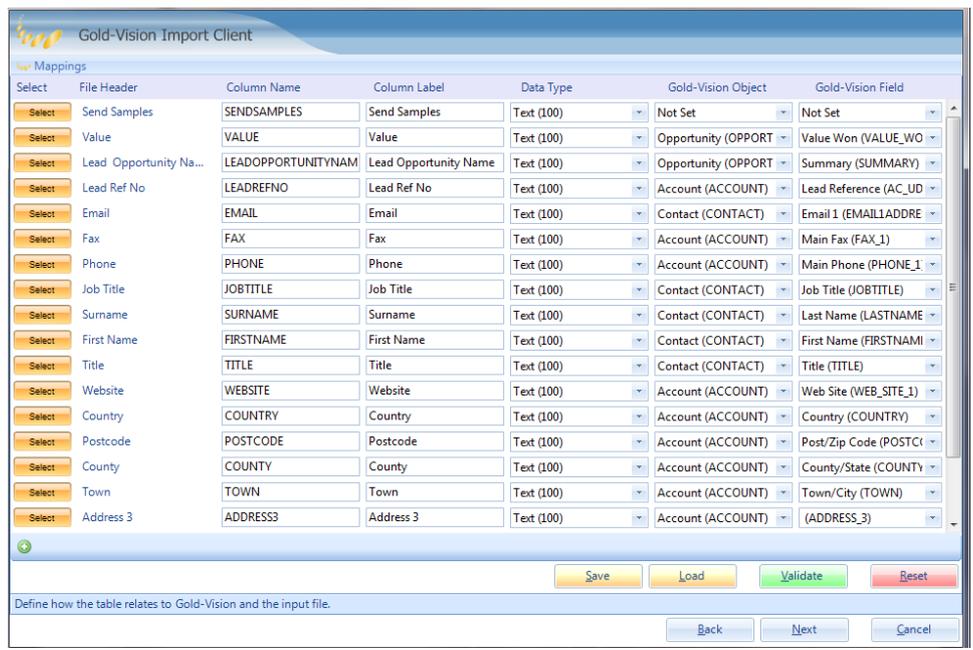
Select	Click Select to omit any fields from the import
File Header	This displays the column heading of the imported file
Column Name	This displays the Lead Management temporary file name – These can be edited and must be unique
Column Label	This is the label of the field you will see in the Lead Management screen. This can be edited if required.
<p>Data Type</p> <p>Select from the drop down eg Text, numeric, date</p> <p>Bool = checkbox, your data should be set to either True or False</p> <p>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.</p>	

<p>Gold-Vision Object</p> <p>Select the Gold-Vision object from the drop down</p>	
<p>Gold-Vision Field</p> <p>Select the relevant field from the drop down</p> <p>Any fields left as not set will be imported into the Lead Management system but will not be imported into Gold-Vision.</p>	

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

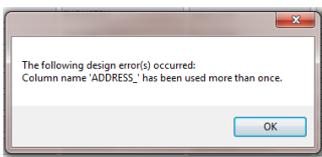


Select	File Header	Column Name	Column Label	Data Type	Gold-Vision Object	Gold-Vision Field
<input type="button" value="Select"/>	Send Samples	SENDSAMPLES	Send Samples	Text (100)	Not Set	Not Set
<input type="button" value="Select"/>	Value	VALUE	Value	Text (100)	Opportunity (OPPORT)	Value Won (VALUE_WO)
<input type="button" value="Select"/>	Lead Opportunity Na...	LEADOPPORTUNITYNAM	Lead Opportunity Name	Text (100)	Opportunity (OPPORT)	Summary (SUMMARY)
<input type="button" value="Select"/>	Lead Ref No	LEADREFNO	Lead Ref No	Text (100)	Account (ACCOUNT)	Lead Reference (AC_UD
<input type="button" value="Select"/>	Email	EMAIL	Email	Text (100)	Contact (CONTACT)	Email 1 (EMAILADDRE
<input type="button" value="Select"/>	Fax	FAX	Fax	Text (100)	Account (ACCOUNT)	Main Fax (FAX_1)
<input type="button" value="Select"/>	Phone	PHONE	Phone	Text (100)	Account (ACCOUNT)	Main Phone (PHONE_1
<input type="button" value="Select"/>	Job Title	JOBTITLE	Job Title	Text (100)	Contact (CONTACT)	Job Title (JOBTITLE)
<input type="button" value="Select"/>	Surname	SURNAME	Surname	Text (100)	Contact (CONTACT)	Last Name (LASTNAME
<input type="button" value="Select"/>	First Name	FIRSTNAME	First Name	Text (100)	Contact (CONTACT)	First Name (FIRSTNAMI
<input type="button" value="Select"/>	Title	TITLE	Title	Text (100)	Contact (CONTACT)	Title (TITLE)
<input type="button" value="Select"/>	Website	WEBSITE	Website	Text (100)	Account (ACCOUNT)	Web Site (WEB_SITE_1)
<input type="button" value="Select"/>	Country	COUNTRY	Country	Text (100)	Account (ACCOUNT)	Country (COUNTRY)
<input type="button" value="Select"/>	Postcode	POSTCODE	Postcode	Text (100)	Account (ACCOUNT)	Post/Zip Code (POSTC
<input type="button" value="Select"/>	County	COUNTY	County	Text (100)	Account (ACCOUNT)	County/State (COUNTY
<input type="button" value="Select"/>	Town	TOWN	Town	Text (100)	Account (ACCOUNT)	Town/City (TOWN)
<input type="button" value="Select"/>	Address 3	ADDRESS3	Address 3	Text (100)	Account (ACCOUNT)	(ADDRESS_3)

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.



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

Screen Six – Import List:

Click **Next** to move to the Summary screen.

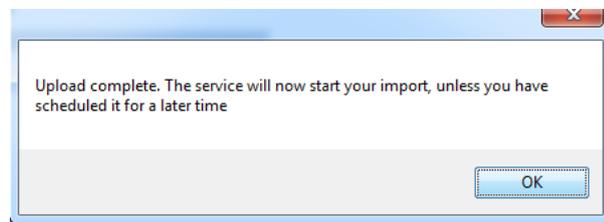
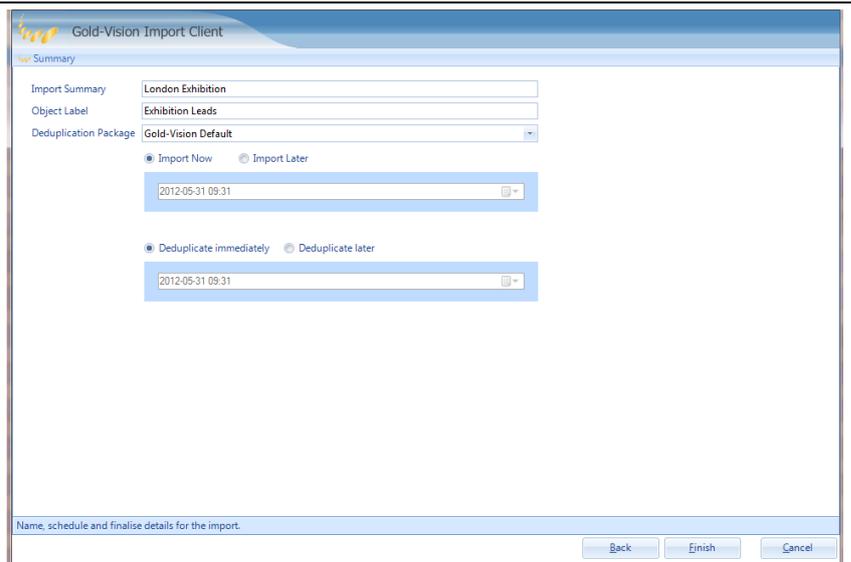
Import Summary – Allows you to uniquely name your import eg Internetworld 2012 List or Technology For Marketing2012 List

Object label –This will identify the list and the screen which is created in Gold-Vision. (If you are updating a mapping this will be populated automatically)

Select to either **Import Now** or **Import Later**.

If you choose to Import Later you may also want to **Deduplicate Later**.

Click **Finish** to Run the import.



Screen Seven: Import Client - Lead Imports screen

Here you can follow the progress of your Import.

Summary	Start Date	Total Rows	Processed Rows	Status	Dedupe Status
LM Update List	12/06/201...	2	0	CompleteNoErrors	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	CompleteNoErrors	Complete
London Exhibition	31/05/201...	39	0	CompleteNoErrors	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.

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:

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

	A	B	C	D	E	F	G	H	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	<input type="text" value="U"/>
Insert Value	<input type="text" value="I"/>
Delete Value	<input type="text" value="D"/>

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

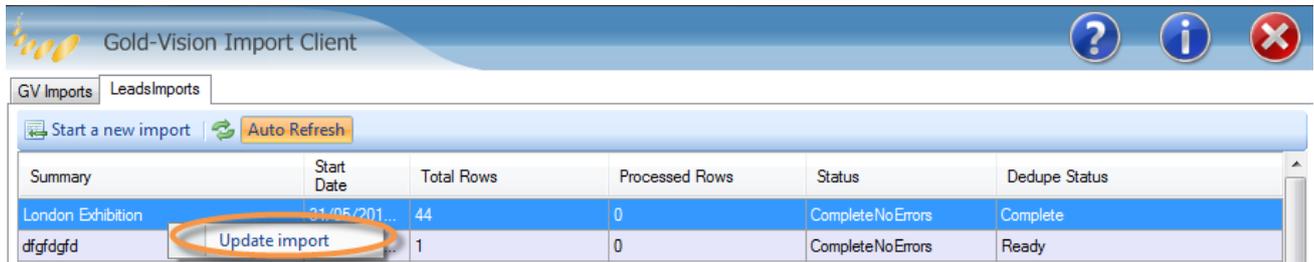
Step Three: During the mapping stage of the import ensure you select your Control Column before progressing.

	A	B	C	D	E	F	G	H	I	J	K	L	
1	Title	Firstname	Lastname	Job Title	Company	Town / city	Country	Company Phone	Direct Phone	Nur	Mobile Number	email	Control Column
2	Ms	Sheryl	Crow	Procurement Ma	Atlantic Group In	Atlantic City	USA	001 485 765 3300	001 485 765 3302			scrow@aggroup.i	
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	
4	Mr	Gary	Barlow	Operations Mana	GB Enterprises Lt	Berlin	Germany	0049 228 745 881	0049 228 745 881			garybarlow@gbe	U
5	Mr	Gloria	Estafan	Procurement Ma	GB Enterprises Lt	Berlin	Germany	0049 228 745 881	0049 228 745 881			gloriaestafan@g	U
6	Ms	Mariah	Carey	Operations Mana	Aspect Aviation	Liverpool	UK	0044 151 748 300	0044 151 748 303	0771 886 779		mcarey@pbclp.c	
7	Ms	Whitney	Houston	IT Director	PBC LLP.	Basildon	UK	0044 1268 364 900	0044 1268 364 900	07970 768 993			D
8	Ms	Janet	Jackson	IT Director	Apex Systems Ltc	Leeds	UK	0044 113 500 900	0044 113 500 900				U
9	Mr	Billy	Joel	Procurement Ma	GKM Transformat	Melton Mowbray	UK	0044 1664 870 970	0044 1664 870 974			bj@gkmtransforr	U
10	Mr	Robbie	Williams	Senior Operation	BBT Insurance Se	Birmingham	UK	0044 161 883567	0044 161 883567	07791 447 295		rw@bbt.com	U
11	Ms	Kylie	MIFALSEgue	Procurement Ma	BBT Insurance Se	Birmingham	UK	0044 161 883567	0044 161 883567	07791 876 556		kylie@bbt.com	U
12	Mrs	Kate	Bush	Managing Directc	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 original import by right clicking on the name of the import and selecting create new import from this.

Screen One – Update Import:



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.

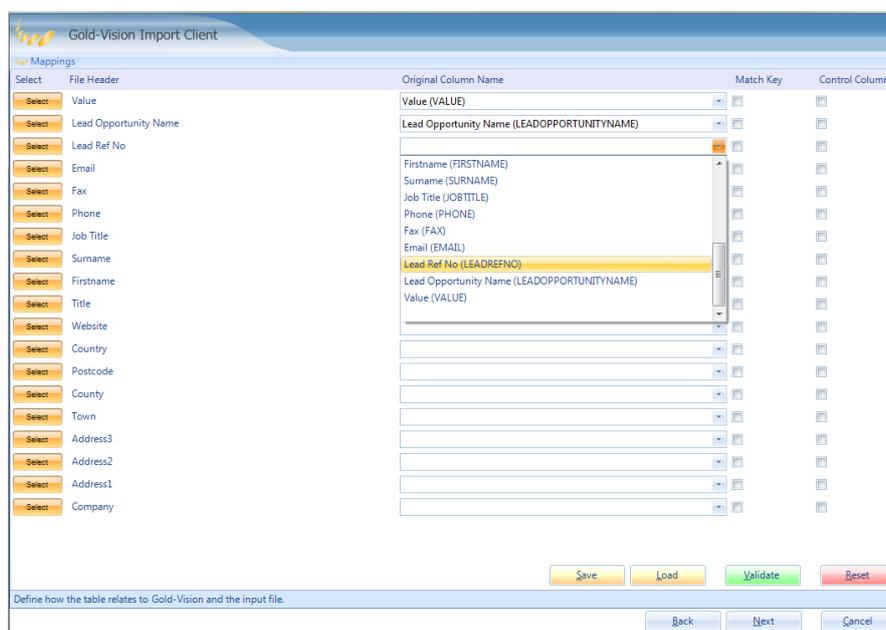
Screen Two:

Click **browse** and select your file.



Screen Three – Validate Mapping and Set Match Data:

Map the fields to the original columns as below



Or Click **Load** to use a previous map if your columns are exactly the same and in the same order.

The screenshot shows the 'Gold-Vision Import Client' interface. The 'Mappings' section is active, displaying a table with the following columns: 'Select', 'File Header', 'Original Column Name', 'Match Key', and 'Control Column'. The table lists various fields such as 'Value', 'Lead Opportunity Name', 'Lead Ref No', 'Email', 'Fax', 'Phone', 'Job Title', 'Surname', 'Firstname', 'Title', 'Website', 'Country', 'Postcode', 'County', 'Town', 'Address3', 'Address2', 'Address1', and 'Company'. Each row has a 'Select' button on the left, a dropdown menu for 'Original Column Name', a dropdown menu for 'Match Key', and a checkbox for 'Control Column'. At the bottom of the screen, there are buttons for 'Save', 'Load', 'Validate', and 'Reset'. The 'Load' button is circled in red. Below the buttons, there is a text prompt: 'Define how the table relates to Gold-Vision and the input file.' and navigation buttons for 'Back', 'Next', and 'Cancel'.

- **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

Screen Four – Import List:

Import Summary – Allows you to uniquely name your import eg Internetworld 2012 List or Technology For Marketing2012 List

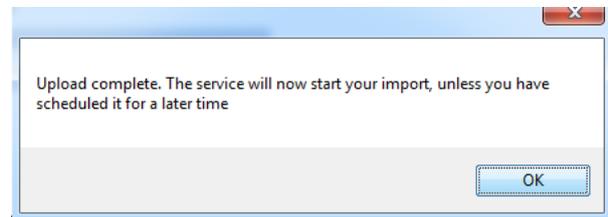
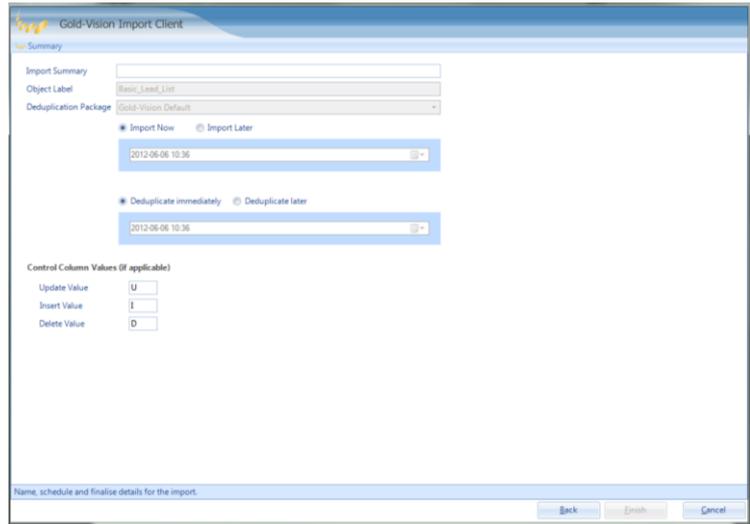
Object label – Will be set automatically on update imports.

Select to either **Import Now** or **Import Later**.

If you choose to Import Later you may also want to **Deduplicate Later**.

Control Values - If you have chosen different Control values in your spreadsheet these can be updated here before progressing

Click **Finish** to Run the import.

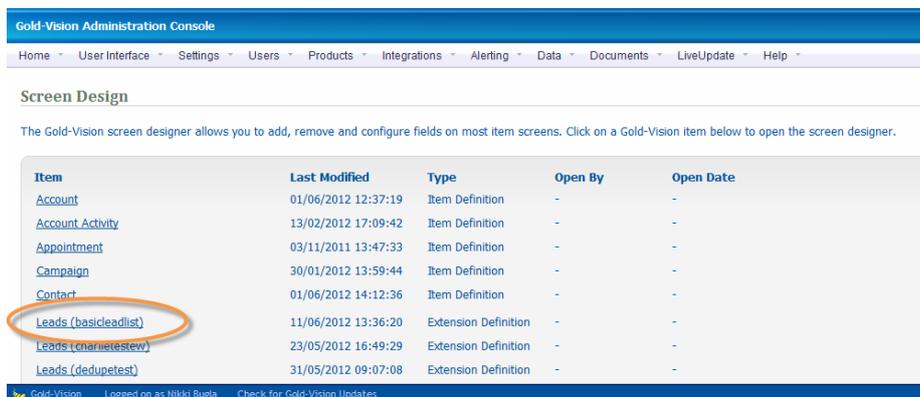


Gold-Vision Configuration - Lead Screen Design:

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**



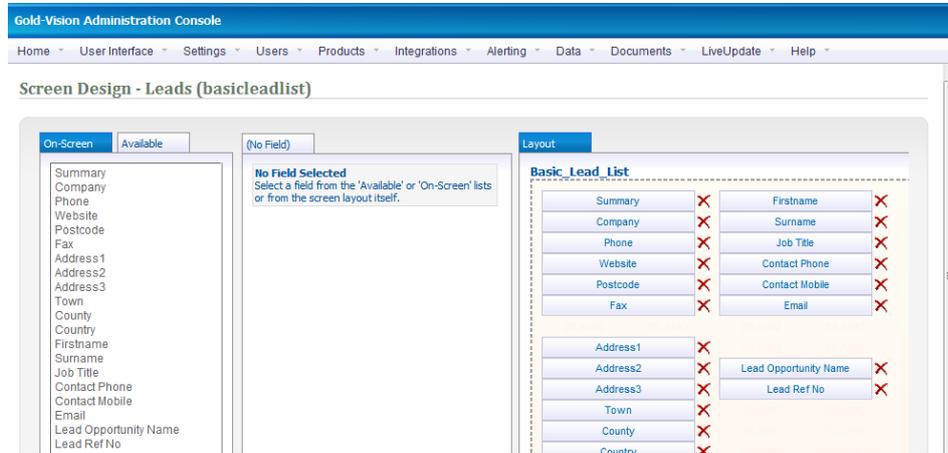
Item	Last Modified	Type	Open By	Open Date
Account	01/06/2012 12:37:19	Item Definition	-	-
Account Activity	13/02/2012 17:09:42	Item Definition	-	-
Appointment	03/11/2011 13:47:33	Item Definition	-	-
Campaign	30/01/2012 13:59:44	Item Definition	-	-
Contact	01/06/2012 14:12:36	Item Definition	-	-
Leads (basicleadlist)	11/06/2012 13:36:20	Extension Definition	-	-
Leads (charleestew)	23/05/2012 16:49:29	Extension Definition	-	-
Leads (dedupetest)	31/05/2012 09:07:08	Extension Definition	-	-

Each imported list has its own associated screen design, which will be used whenever data from that list is actioned.

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)**

Configure Alert - Demo Lead Creation Alert

Alert Type: Opportunity 'On-Save' - Created by Eddie White on 22/05/2012. Last updated by Eddie White on 22/05/2012.

Alert Text: Demo Lead Creation Alert - This is displayed to user when alert fires.

Notes: Opportunity

Alert Conditions - What causes this alert to 'fire'?

These conditions will be evaluated when these items are created or updated: Opportunity

Trigger will fire when the item is created

Trigger when update is from a particular source: updatesource_leadmanagement

Alert Actions - What to do when alert conditions are met?

Send an Email: Email Object Owner | Test Opportunity Alert Template

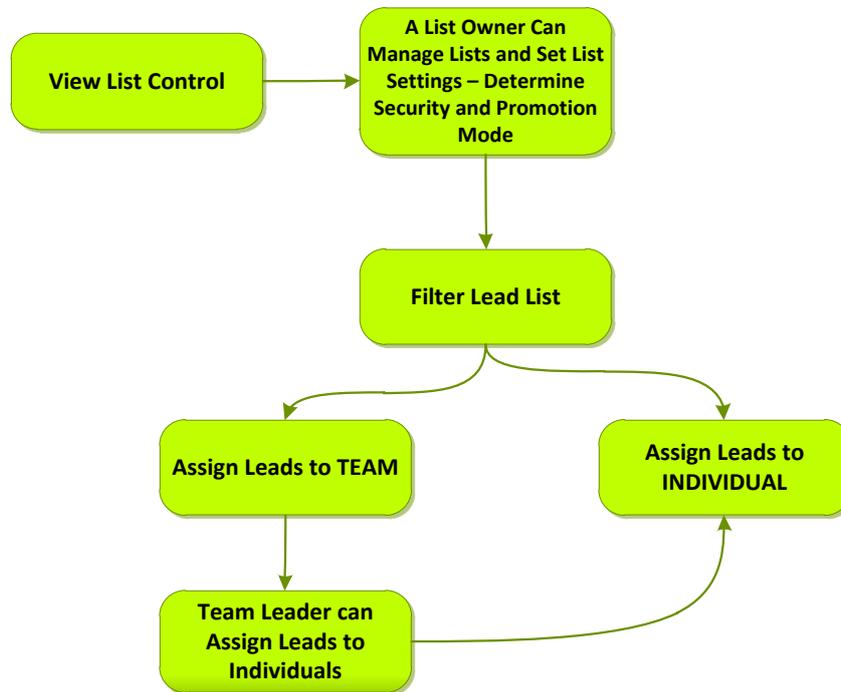
Create a new Activity: [Configure and manage data settings](#)

Set fields in the record: [Configure and manage data settings](#)

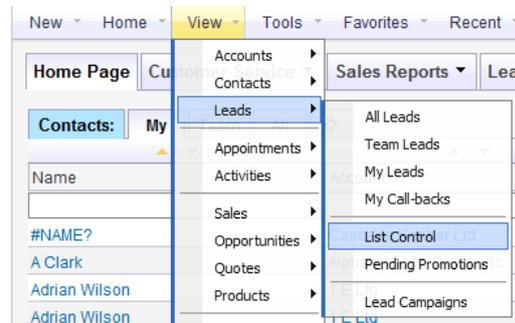
Deactivate Save Close This alert will fire when the conditions are met.

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.



The list of imported lists will be displayed.

Summary	View Leads	Manage List	Owner	Created Date	Total Records	Status
Exhibition Leads	View Leads (44)	Manage List	Nikki Bugla	31/05/2012 09:35:02	44	Open
Export A	View Leads (1044)	Manage List	Nikki Bugla	25/05/2012 14:20:23	1044	Open
Leads F	View Leads (43)	Manage List	Nikki Bugla	25/05/2012 11:18:18	43	Open
charlie-test-EW3	View Leads (1)	Manage List	Eddie White	23/05/2012 16:49:29	1	Open

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

Lead Management Edit Undo Close

Summary: LM Exhibition List

Total Leads: 18

Total Promoted: 0 (0 %)

Total Claimed: 0 (0 %)

List Owner: Jiggy Keith

List Status: Open (Leads Editable)

Access Mode: Private (User-Level)

Promotion Mode: Anyone

Assign Leads Assign

Summary	Record Team C	Record Owner	Status	Callback date	Discarded	Promoted
Billy Idol (Atlantic Gr...	-	-	-	-	No	No
Billy Joel (GKM Tran...	-	-	-	-	-	-
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.

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

Open - Leads are visible to Lead Management Users

Closed – Leads are hidden.

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 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)

Anyone by default

Use this to determine whether any User can promote Leads (to Gold-Vision) or whether they require approval by the list owner.

Lists can be **deleted** by the List Owner or the System Administrator

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**

- Select Assign to User
- Select the user from the dropdown

You can either

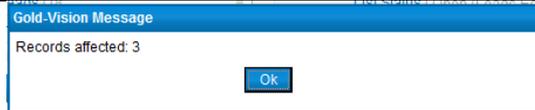
- assign **all** the records
- or assign a certain number or percentage of records

This method can also be used to **re assign** Leads

Force Overwrite – This will replace the owner if

leads are re-assigned

Click **Go**



You will now see the Record Owner and the Record Team Owner for each Lead. The Lead Management record will indicate how many Leads have been claimed/assigned.

Lead Management Edit Undo Close

Summary: LM Exhibition List

Total Leads: 18

Total Promoted: 0 (0 %)

Total Claimed: 3 (16 %)

List Owner: Jiggy Keith

List Status: Open (Leads Editable)

Access Mode: Private (User-Level)

Promotion Mode: Anyone

Assign Leads Assign

Summary	Record Team	Record Owne	Country	Callback date	Discarded	Promoted
			usa	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

You may wish to filter the list by a region/town and then assign the Leads to a particular team:

Change a column heading to Town and enter a Town

Click **Assign**

Assign Leads Assign

Summary	Record Team	Record Owne	Town / city	Callback date	Discarded	Promoted
			birm liverpool	Select a date...	No	No
Robbie Williams (...	-	-	Birmingham	-	-	-
Kylie MIFALSEgue...	-	-	Birmingham	-	-	-
Kate Bush (BBT In...	-	-	Birmingham	-	-	-
Joe Jackson (Asp...	-	-	Liverpool	-	-	-
Mariah Carey (Asp...	-	-	Liverpool	-	-	-

Select **Assign to a Team**

Select a Team from the dropdown (teams are set up in the Admin Console)

If you wish to assign to individual members of the team (rather than make the Leads available to any member of the team) tick **Assign to Individuals**

Gold-Vision Message

Using this control you can assign up to the following number of filtered records: 5

Assign to a Use Assign to a Team

Assign to: No-one (Remove Team) Assign to Individuals

Assign to Administrators

Force o

50 Records

Go Cancel

Select Assign All records or a certain number or percent
 Click **Go**
 Leads will be assigned to the members of the team.

Gold-Vision Message

Using this control you can assign up to the following number of filtered records: 5

Assign to a User Assign to a Team

Assign to: Northern Sales Assign to Individuals

Assign All 5 Records Assign First: 50 Records
 Force overwrite/replace existing owners?

Go **Cancel**

Assign Leads Assign

Summary	Record Team	Record Owne	Town / city	Callback date	Discarded	Promoted
			birm liverpool	Select a date...	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 member 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

Summary	Record Team	Record Owne	Town / city	Callback date	Discarded	Promoted
			bour welwyn	Select a date...	No	No
Cliff Richard (Avria...	Southern Sales	-	Bournemouth	-	-	-
Elvis Presley (Avri...	Southern Sales	-	Bournemouth	-	-	-
Mike Oldfield (TSK...	Southern Sales	-	Welwyn Garden ...	-	-	-
David Bowie (TSK...	Southern Sales	-	Welwyn Garden ...	-	-	-

List Owner

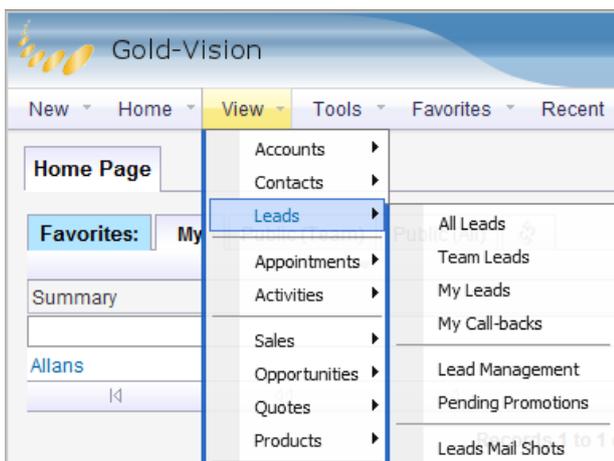
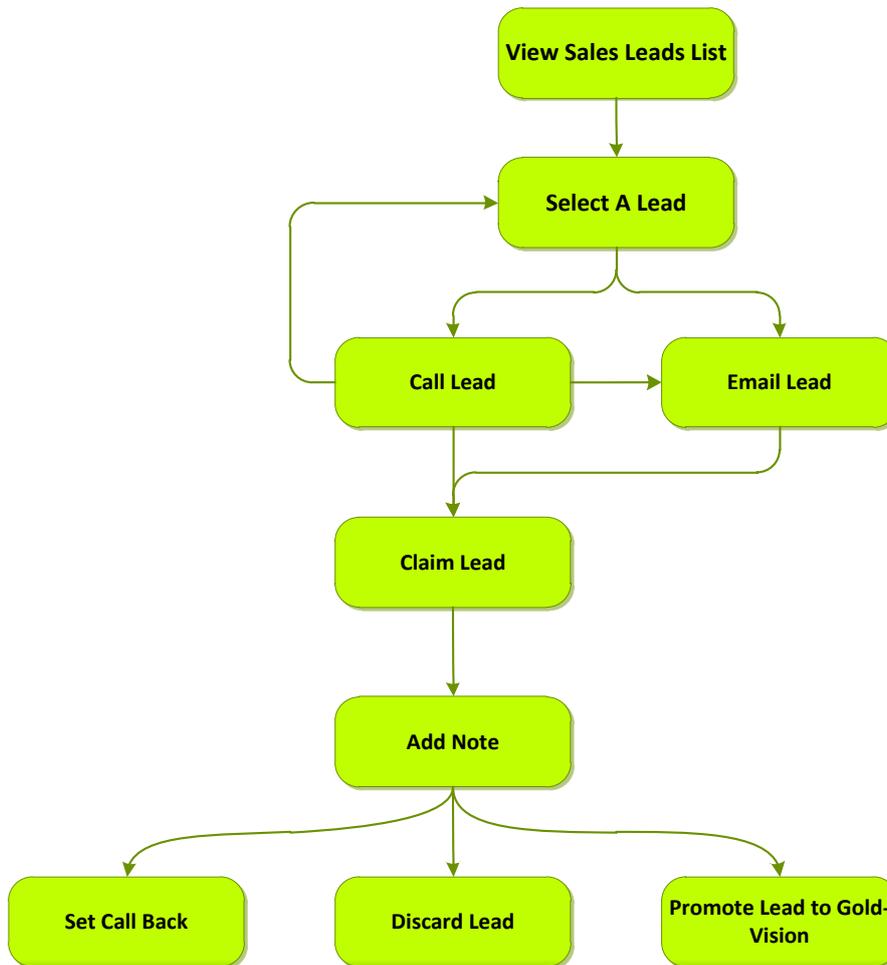
A list owner (and a Gold-Vision system administrator) can change the settings of the list (Owner, Status, Access Mode and Promotion Mode) and assign ANY Leads.

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



- **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 → Leads → 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.

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

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)

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.

Previous/Next - These allow the user to move forward and backward through individual records. When the end of a page is reached the next page will open automatically.

Email - Click to open a new email to the Lead. If the record does not contain an email address, this will be inactive.

Call - Click to dial the number for the Lead (requires phone system integration - if there is more than one number it will pick a number in the following order –contact phone, main phone, mobile, . If all phone number fields are blank the tab will be inactive)

Call Back - Allows the user to save a date and time to call the Lead back. This will make the Lead appear under the 'Call-backs' tab

Promote - Displays the promotion control.

Discard – If no longer wish to be the owner of the Lead this action removes ownership of the Lead as well as flags it as "discarded".

Delete - Deletes the record completely.

Status / Outcome. This allows the user to quickly 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**.

Find other Contacts search for any other contacts at this organisation. If any matches are found the following control will be shown, which is similar in function to the duplicates list. This allows the user to quickly see who else might be known or being spoken to at the current organisation by other users.

[Find other Contacts at Atlantic Group Inc.](#)

Gold-Vision Message					
Potential Colleagues					
Filter: <input checked="" type="checkbox"/> Gold-Vision Contact <input checked="" type="checkbox"/> Same List <input checked="" type="checkbox"/> Other List <input checked="" type="checkbox"/> No Access					
Source	Name	Company	Job Title	Status	Owner
	Sheryl Crow	Atlantic Group Inc.	Procurement Manager	Not Set	None (Claim Discard)
	Tovah Wilcox	Atlantic Group Inc.	IT Director	Not Set	None (Claim Discard)

Source of the other Contacts

- Gold-Vision Contact** – this indicates potential duplicates in your main Gold-Vision
- 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

Unclaimed Leads can be claimed by clicking this link
 A note is added as confirmation that the Lead has been claimed.

No-one owns this Lead. [Claim this Lead?](#)

Gold-Vision Message

Claim this Lead? You will become the owner.

~~~ 03/04/2012 14:11 - Nikki Bugla ~~~ Lead claimed by Nikki Bugla

If Leads are owned by another User, this will be displayed and you will not have access to the above tabs.

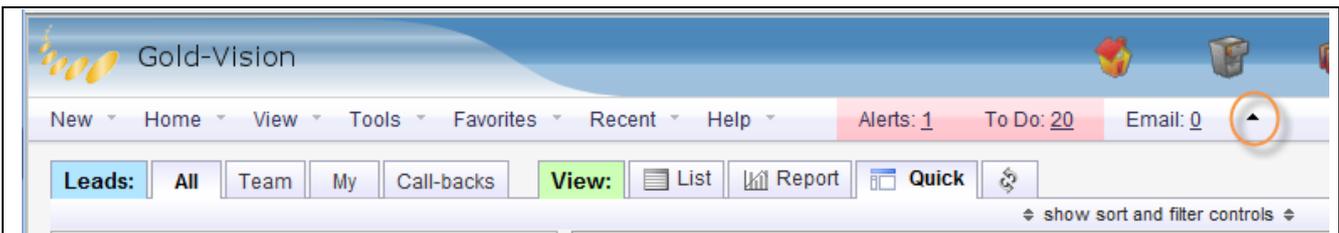
Lead ▾

← Prev    Next →

Status / Outcome:  [Find other Contacts](#)

✗ This record is owned by someone else: [Tim Beresford](#)

## List Tabs



### 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)

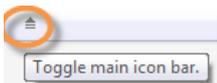
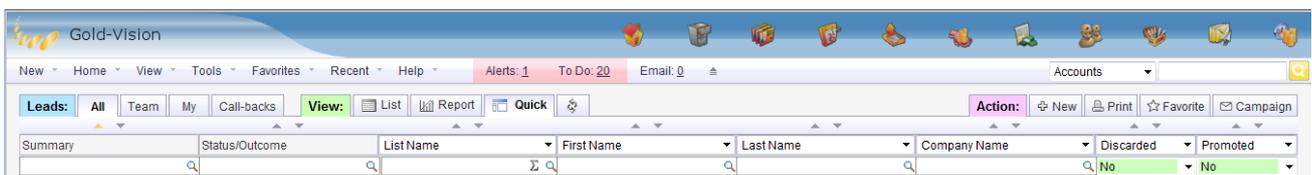
### View:

**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



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



Click again to reinstate the Icons



**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:

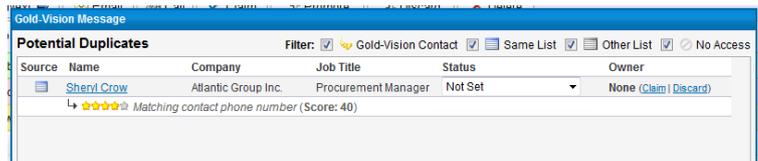
**Gold-Vision Contact** – this indicates potential duplicates in your main Gold-Vision database

**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

Click on the Gold-Vision Contact record to review further details. Actual duplicates can then be discarded or deleted.

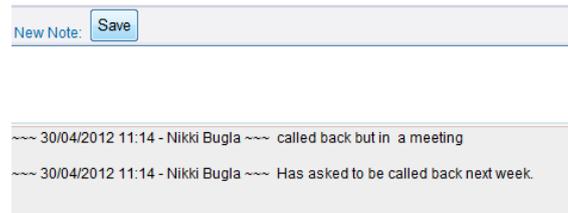


See **Appendix B** for full details

Other fields on the screen are configurable in the Administration Console.

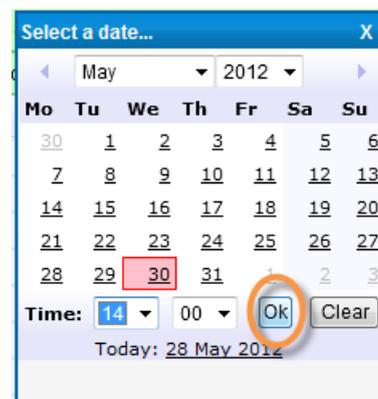
**Notes** Add a new note and click **Save**. Notes can be viewed as a list.

When records are promoted to Gold-Vision the Notes will also be imported.



**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.



The **Call-backs** tab shows a list of your Call-backs.

When you have made the call click **Remove Call-Back** to remove from your list of call backs.

### 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)

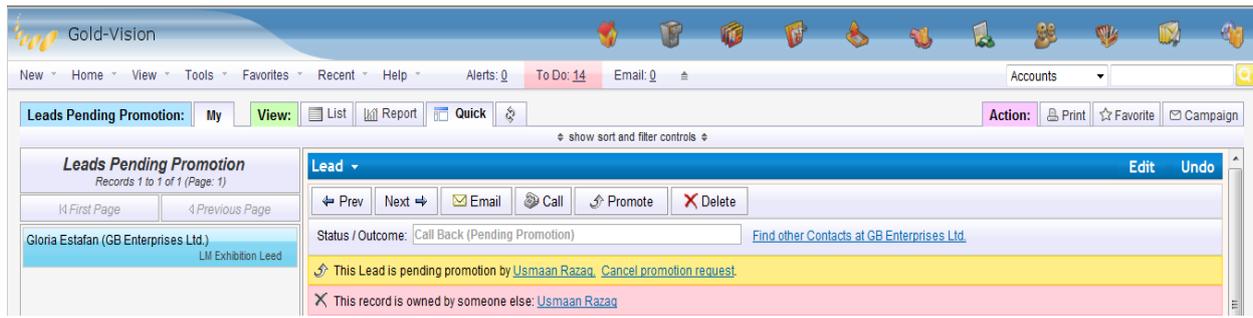
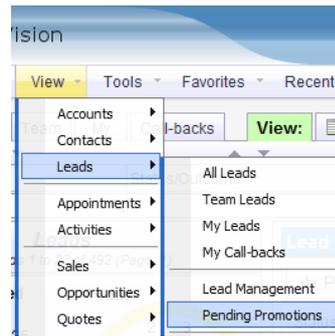
Click **Promote** on the Lead record

The Lead Record is updated to show it is pending promotion.

Click Cancel if you no longer wish this record to be promoted.

This record will appear on the **Pending Promotions** list for the List Owner to promote

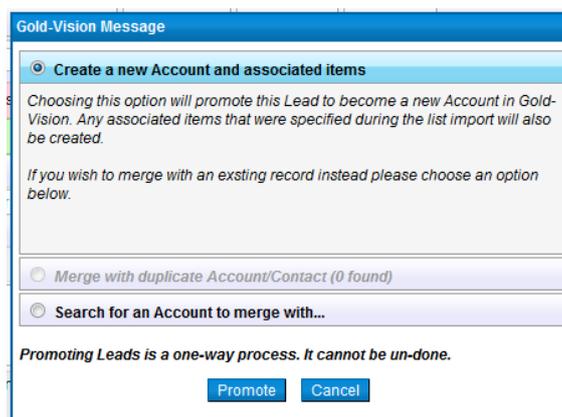
The **List Owner** can then Promote or Cancel the promotion request, see below.



## 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.

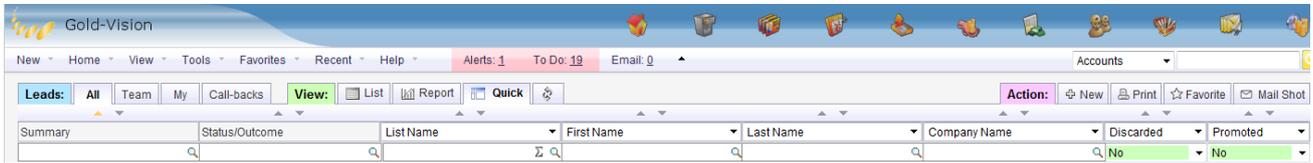


Once a Lead has been promoted it is no longer editable within the Lead system, however, a link to the promoted Account is displayed. Contacts will be created and Notes will be copied in the Account record



## Searching for Leads

The standard Gold-Vision column heading and search facility are available.



If you are working on a small screen you may find that the search and filter controls are hidden. Click the link to show the column headings to enable you to search for Leads.



You can also view the Leads in a List View by clicking the List Tab

A screenshot of the Gold-Vision software interface showing a list view of leads. The 'View:' section has the 'List' tab selected and circled in red. The table below shows a list of leads with columns for 'Summary', 'Status', 'Industry', 'Duplicate Score', 'Lastname', 'Job Title', 'Discarded', and 'Promoted'. The 'Promoted' column has a dropdown menu set to 'All', which is also circled in red.

| Summary                             | Status        | Industry      | Duplicate Score | Lastname | Job Title           | Discarded | Promoted |
|-------------------------------------|---------------|---------------|-----------------|----------|---------------------|-----------|----------|
| Billy Idol (Atlantic Group Inc.)    | -             | -             | 40              | Idol     | CEO                 | -         | -        |
| Billy Joel (GKM Transformatio...    | -             | -             | 0               | Joel     | Procurement Manager | -         | ✓        |
| Cliff Richard (Avian Logistics ...) | -             | -             | 0               | Richard  | IT Director         | -         | -        |
| David Bowie (TSK Informatics)       | Send Brochure | Retail        | 40              | Bowie    | IT Director         | -         | ✓        |
| Gary Barlow (GB Enterprises L...    | -             | -             | 0               | Barlow   | Operations Manager  | -         | -        |
| Gloria Estafan (GB Enterprise...    | Call Back     | -             | 0               | Estafan  | Procurement Manager | -         | -        |
| Janet Jackson (Apex Systems ...)    | Send Proposal | Manufacturing | 0               | Jackson  | IT Director         | -         | ✓        |

Viewing Promoted Leads

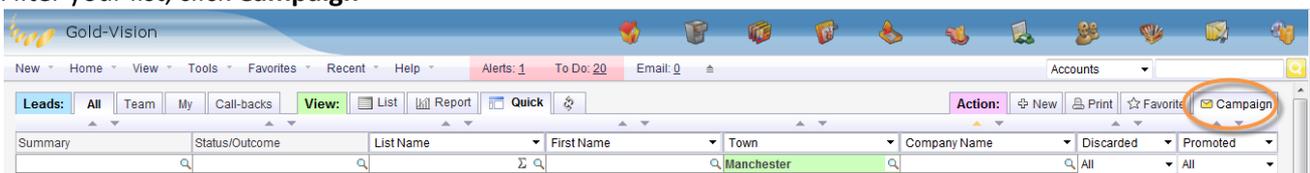
## Lead Campaigns

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**



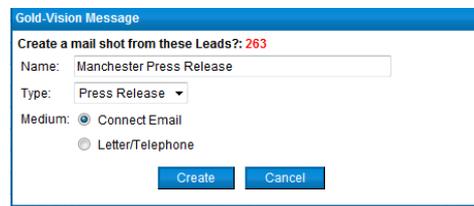
### Option 1- Connect Mailshot

Enter a name for your mailshot

Select a Type

Select Connect Email

Click Create



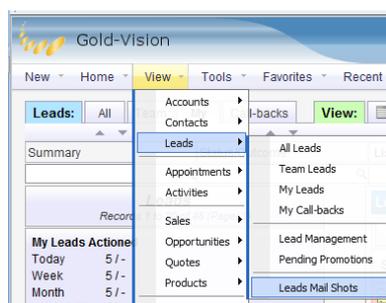
This will upload the recipients to Connect and create a new mail shot.

(Please note: You must have an active Connect account and user access to Gold-Vision Campaigns.)

**View → Leads → 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.



| Summary                  | Medium / Status    | Type          | Source List | Recipients | Sent | Bounced | Opened | Clicked |
|--------------------------|--------------------|---------------|-------------|------------|------|---------|--------|---------|
| Manchester Press Release | Connect - Complete | Press Release | Mixed       | 263        | 0    | 0       | 0      | 0       |
| Nikki Mailshot           | Connect - Complete | Telemarketing | Mixed       | 17552      | 0    | 0       | 0      | 0       |

## Option 2 - Telephone Campaign

Filter your list, click **Campaign**

Enter a name for your mailshot

Select a Type

Select Letter/Telephone

Click Create

**Gold-Vision Message**

Create a Campaign from these Leads?: 4

Name:

Type:

Medium:  Connect Email  
 Letter/Telephone

**Gold-Vision Message**

Your Campaign has been created.

## Working on the Telephone Campaign

View → Leads → Leads Campaigns

| Summary                     | Medium / Status             | Type               | Source List | Recipients | Sent | Bounced | Opened | Clicked |
|-----------------------------|-----------------------------|--------------------|-------------|------------|------|---------|--------|---------|
| Telesales - Birmingham Area | Letter/Phone                | Telesales          | Mixed       |            | 4    | -       | -      | -       |
| Nikki Test                  | Letter/Phone                | Account management | Mixed       |            | 15   | -       | -      | -       |
| test                        | Telesales - Birmingham Area | Account management | Mixed       |            | 15   | -       | -      | -       |
| Berlin Press Release        | Connect - Complete          | Press Release      | Mixed       |            | 2    | 0       | 0      | 0       |

**Telesales - Birmingham Area**

Records 1 to 4 of 4 (Page: 1)

**My Leads Actioned**

|       |         |
|-------|---------|
| Today | 0 / 5   |
| Week  | 0 / 25  |
| Month | 1 / 100 |

00:00 05:13

1/4 First Page 4/4 Previous Page

**Danni Minogue (BBT Insurance Services)**

**Kate Bush (BBT Insurance Services)**

**Kate Minogue (BBT Insurance Services)**

**Lead**

← Prev Next → Email Call Call Back Promote Delete

Status / Outcome: (Pending Promotion) Find other Contacts at BBT Insurance Services

This Lead is pending promotion by you. [Cancel promotion request.](#)

✓ You are the owner of this record. Assigned by: Jigy Keith

**Details**

|                      |                                        |
|----------------------|----------------------------------------|
| Summary              | Danni Minogue (BBT Insurance Services) |
| Company              | BBT Insurance Services                 |
| Company Phone Number | 0044 161 883567                        |
| Web Domain           |                                        |

### Option 3 - Word Mail Merge

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

Filter your list and click **Campaign**

Enter a name

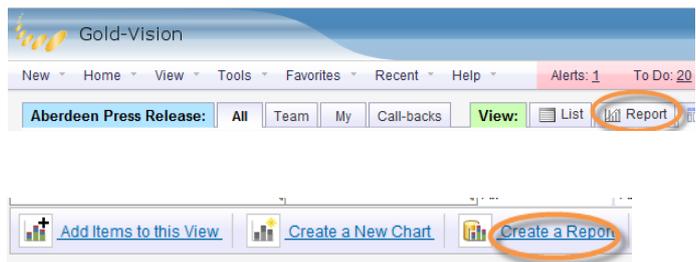
Select a Type

Select Letter/Template

Click Create

**View → Leads → Leads Campaigns**

Select your Mailshot, select the Report Tab, click Create a Report.



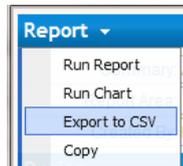
Enter a name for the **Report**, click OK

Edit the the report record to include the fields you require, click save.

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.



## Glossary

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|                        |                                                                                                                                                                                                                                                                                                                                                                              |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.<br><br>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

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## 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 (<http://en.wikipedia.org/wiki/Soundex>).

## 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:

| <b>Company Name</b>          | <b>Town</b>        |
|------------------------------|--------------------|
| <i>Gold-Vision</i>           | <i>West Haddon</i> |
| <i>Gold Vision (Esteiro)</i> | <i>West Haddon</i> |

#### 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:

| <b>Company Name</b>        | <b>Town</b>        |
|----------------------------|--------------------|
| <i>Esteiro Gold-Vision</i> | <i>West Haddon</i> |
| <i>Gold-Vision</i>         | <i>West Haddon</i> |

#### 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:

| <b>Company Name</b>          | <b>Postcode</b> |
|------------------------------|-----------------|
| <i>Gold-Vision</i>           | <i>NN6 7NY</i>  |
| <i>Gold Vision (Esteiro)</i> | <i>NN67NY</i>   |

#### 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:

| <b>Company Name</b>        | <b>Postcode</b> |
|----------------------------|-----------------|
| <i>Esteiro Gold-Vision</i> | <i>NN6 7NY</i>  |
| <i>Gold-Vision</i>         | <i>NN67NY</i>   |

### 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:

| <b>Contact Phone</b>      | <b>Contact Mobile</b> | <b>Company Phone</b> |
|---------------------------|-----------------------|----------------------|
| <i>+44 (0)1788 123456</i> | <i>07224 325898</i>   | <i>01788 511110</i>  |
| <i>01788 123456</i>       | <i>07456 481354</i>   | <i>01788 515423</i>  |

| <b>Contact Phone</b>      | <b>Contact Mobile</b> | <b>Company Phone</b> |
|---------------------------|-----------------------|----------------------|
| <i>+44 (0)1788 123456</i> | <i>07224 325898</i>   | <i>01788 511110</i>  |
| <i>+44 (0)7224325898</i>  | <i>07456 481354</i>   | <i>01788 515423</i>  |

An example where duplicates would not be flagged:

| <b>Contact Phone</b> | <b>Contact Mobile</b> | <b>Company Phone</b> |
|----------------------|-----------------------|----------------------|
| <i>01788 511110</i>  | <i>07224 325898</i>   | <i>01788 511110</i>  |
| <i>01788 123456</i>  | <i>01788 511110</i>   | <i>01788 511110</i>  |

### 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