# 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

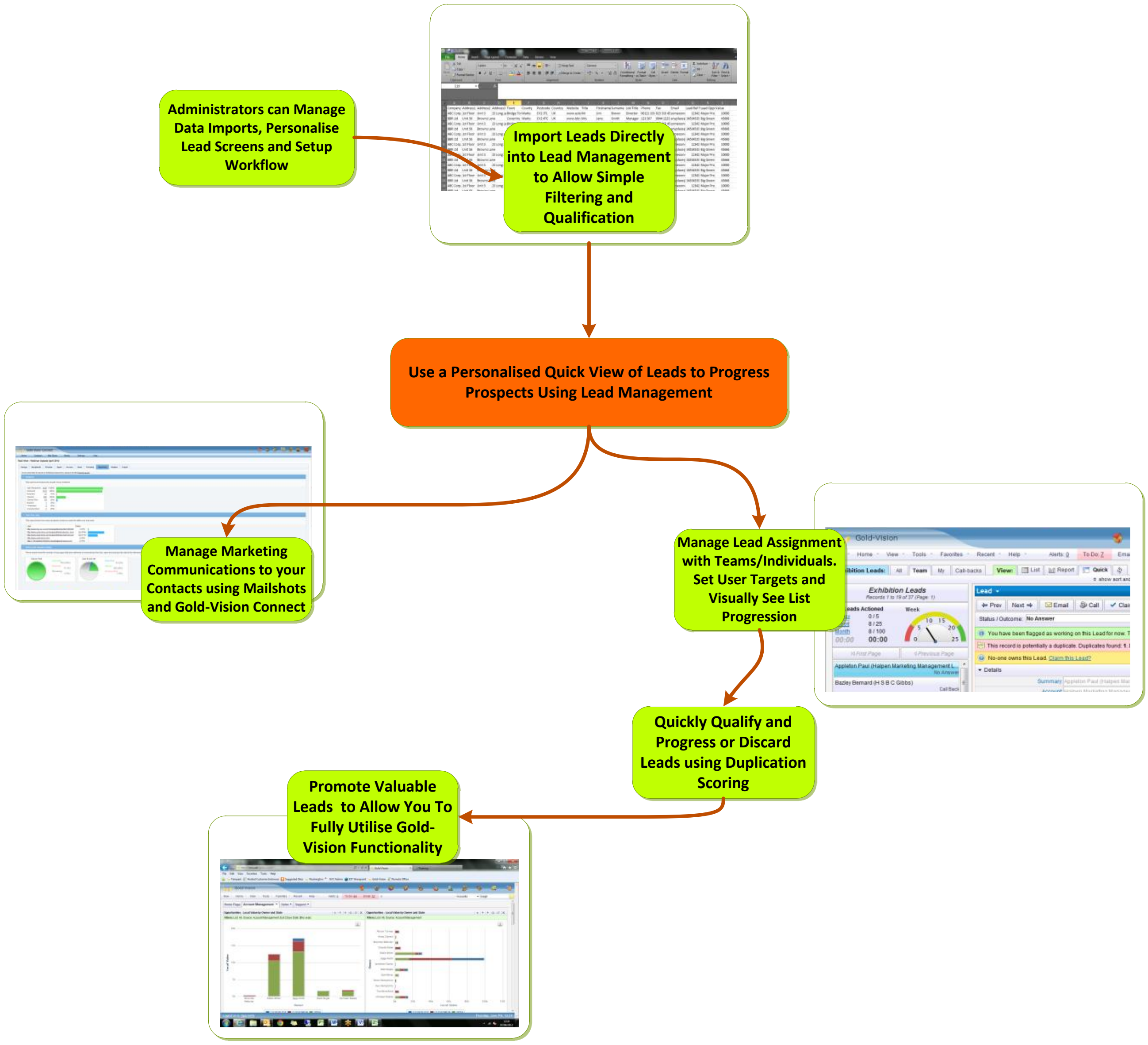
- Set Lead progression targets by Team or User

- Send Mailshots to your Lead prospects or filter Leads to send more direct mailings

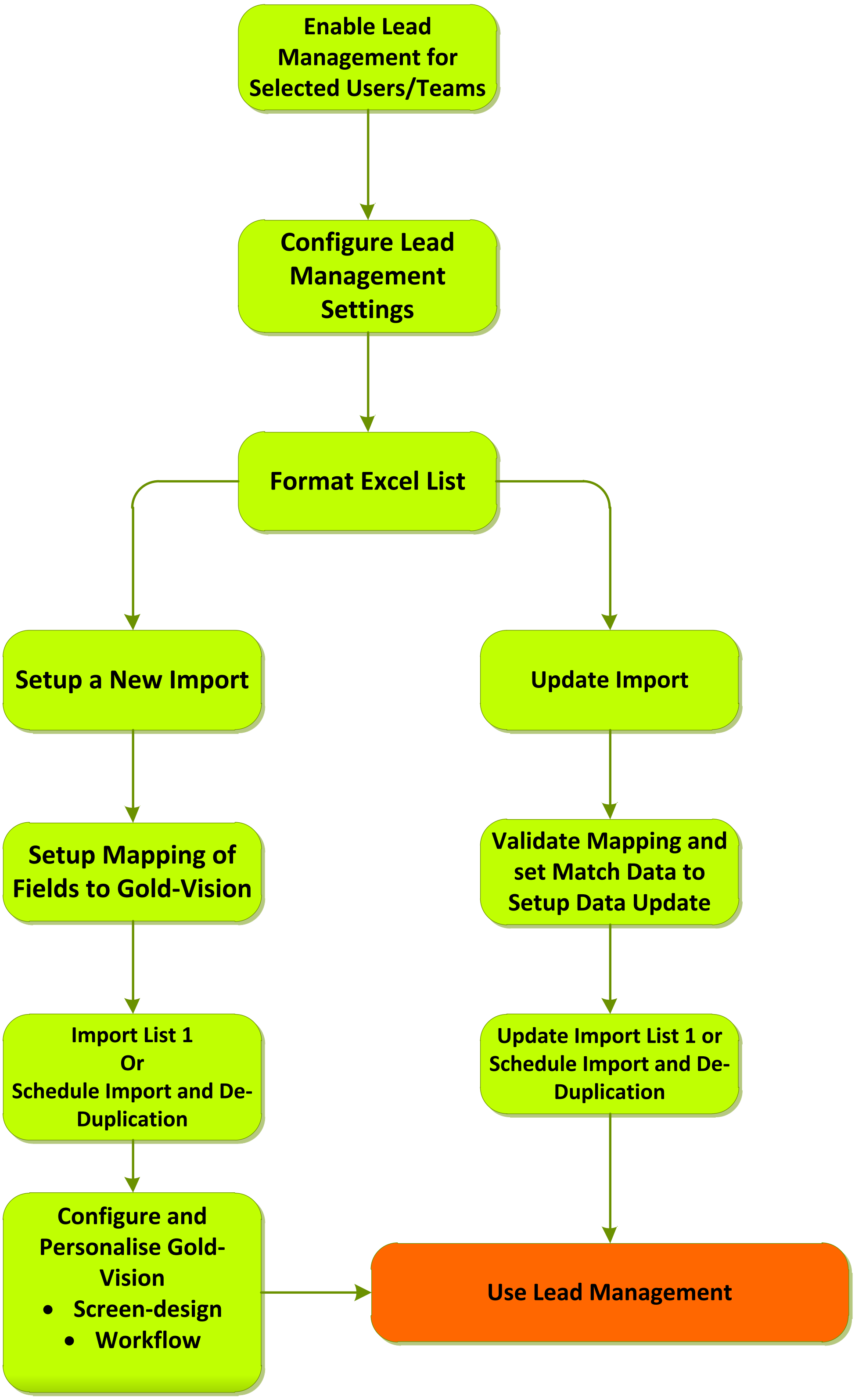
- Promote valuable Leads to Gold-Vision keeping required notes and data captured

- 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


Administrators can Manage Data Imports, Personalise Lead Screens and Setup Workflow
Import Leads Directly into Lead Management to Allow Simple Filtering and Qualification
Use a Personalised Quick View of Leads to Progress Prospects Using Lead Management
Manage Marketing Communications to your Contacts using Mailshots and Gold-Vision Connect
Manage Lead Assignment with Teams/Individuals. Set User Targets and Visually See List Progression
Quickly Qualify and Progress or Discard Leads using Duplication Scoring
Promote Valuable Leads to Allow You To Fully Utilise Gold-Vision Functionality

# Lead Management Configuration and Import Process

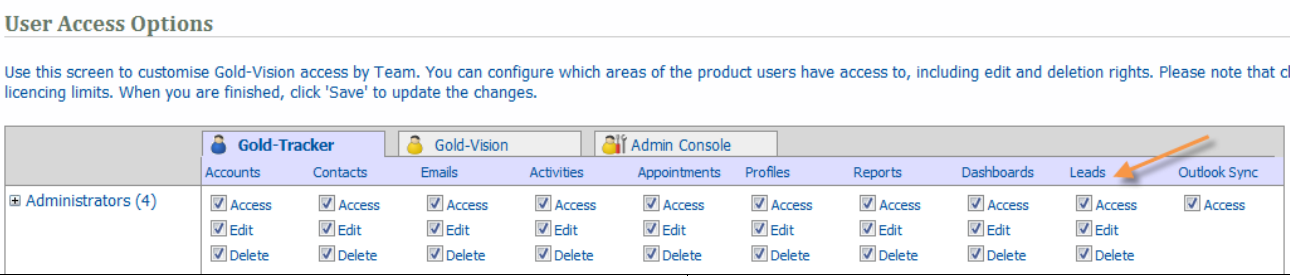


# Admin Console - Lead Management Set-up

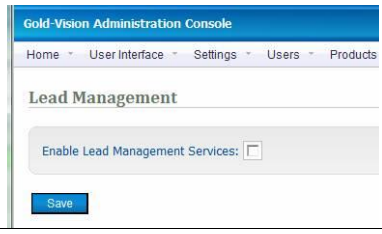
Prior to using Lead Management for the first time, the Gold-Vision Administrator will need to perform some administration steps using the Gold-Vision Administration Console.

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




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

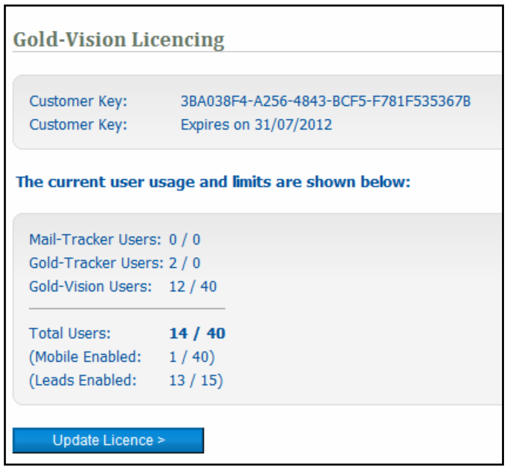



**Licences**

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**.

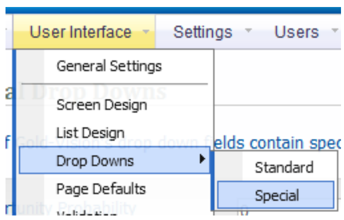
Please contact your account manager if additional licenses are required.

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

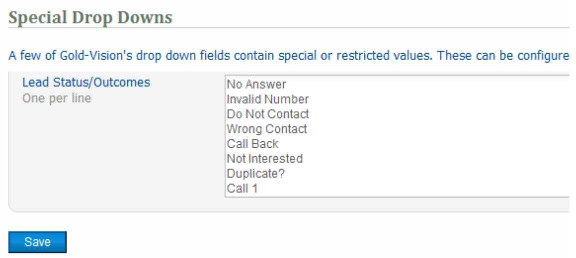


**Edit** – click on a dropdown and edit as required

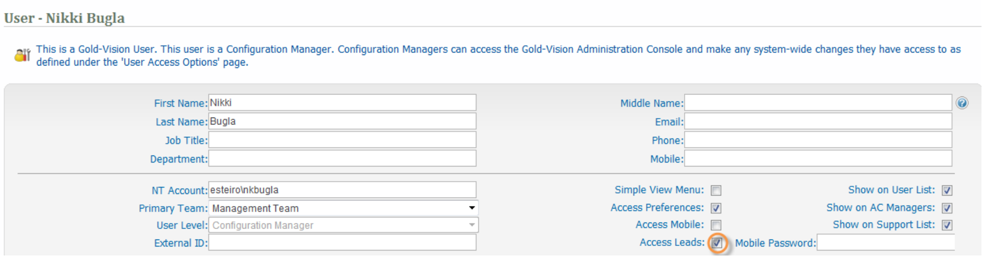
**New** – a new outcome can be added

**Delete** – select an option and delete

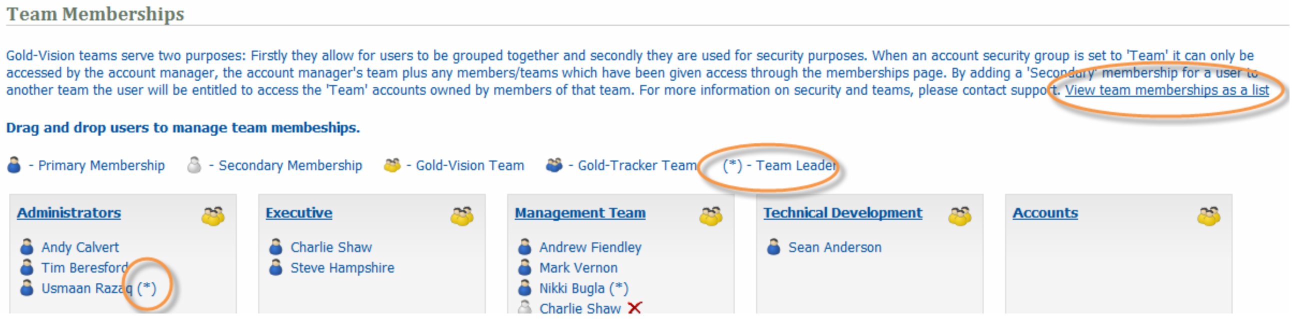
Click **Save**



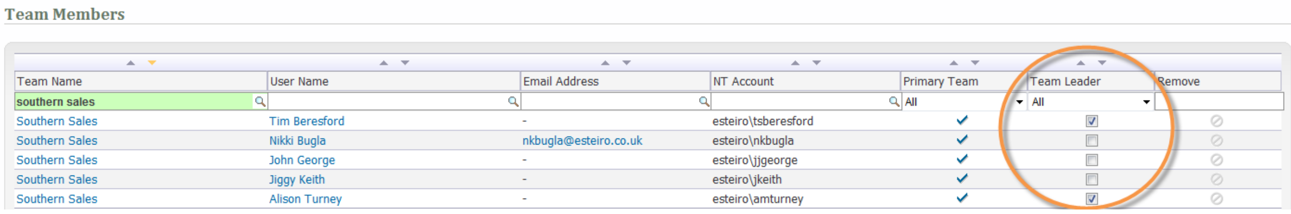

**User Access Leads Setting:** Specific Users will then need to be granted access to the Lead system via the Access Leads checkbox on the user screen.



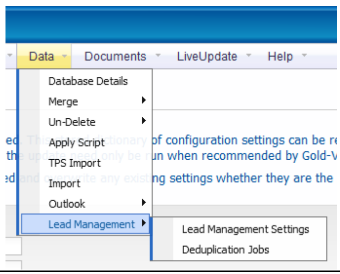

**Team Leader:** A Team Leader can assign Leads when a list is set to Team or Public.
Team Leaders can be set up via the ***Users → Team Membership*** menu.
Select **View team membership** as a list.




Tick the **Team Leader** box.




**Lead Management Settings**



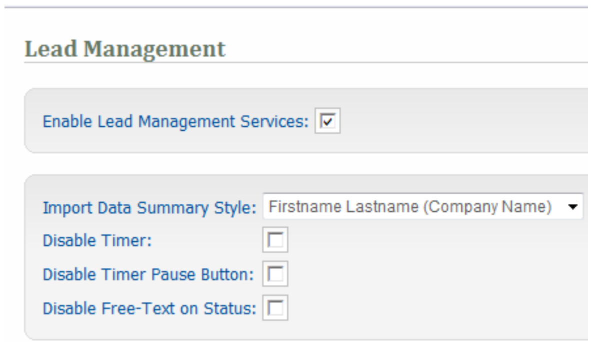
There are checkboxes to control the behaviour of Lead Management options.

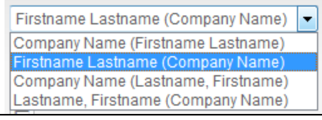
**Import Data Summary Style** – chose the format of the Lead summary from the dropdown

**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

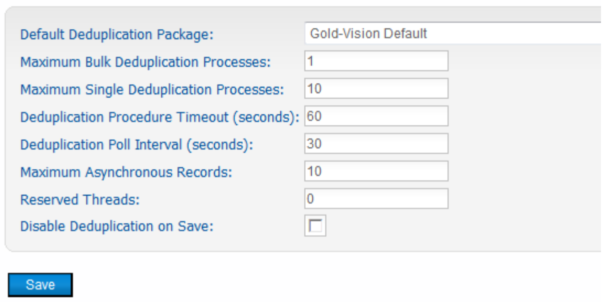
**Disable Free-Text on Status** – Tick to prevent Users from entering free text on the Lead Outcome/Status



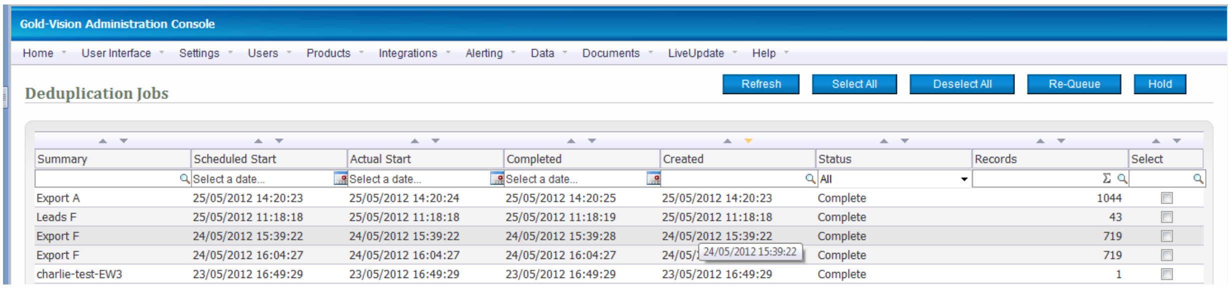




The settings shown in the lower portion of the screen are used for resource control of the de-duplication process.

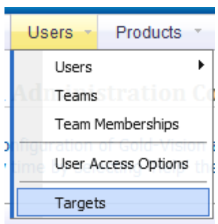
**Please ONLY update as directed by Gold-Vision Support.**



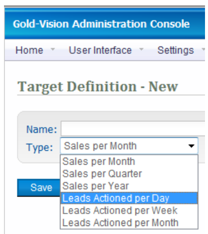

**De-duplication Jobs** Shows a list of imports and the status of the de duplication process.




**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)

| Company | Address1 | Address2 | Address3 | Town | County | Postcode | Country | Website |
|---|---|---|---|---|---|---|---|---|
| ABC Corp. | 1st Floor | Unit 3 | 23 Long Lane | Bridge Town | Warks | CV2 3TL | UK | www.esteiro.co.uk |
| BBR Ltd | Unit 56 | Browns Lane | | Coventry | Warks | CV2 4TC | UK | www.bbr.com |

| 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.

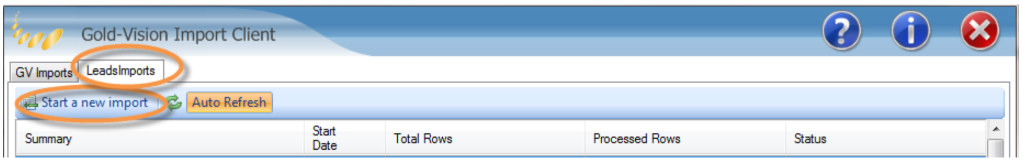
## Starting a new Import

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.

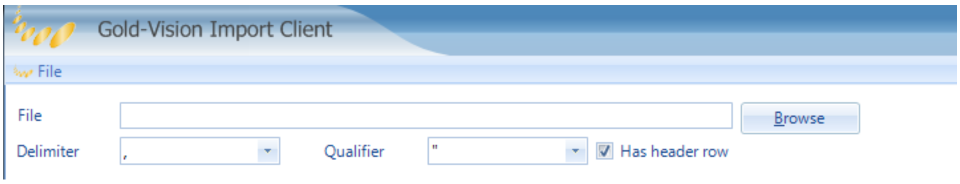
Screen One:




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

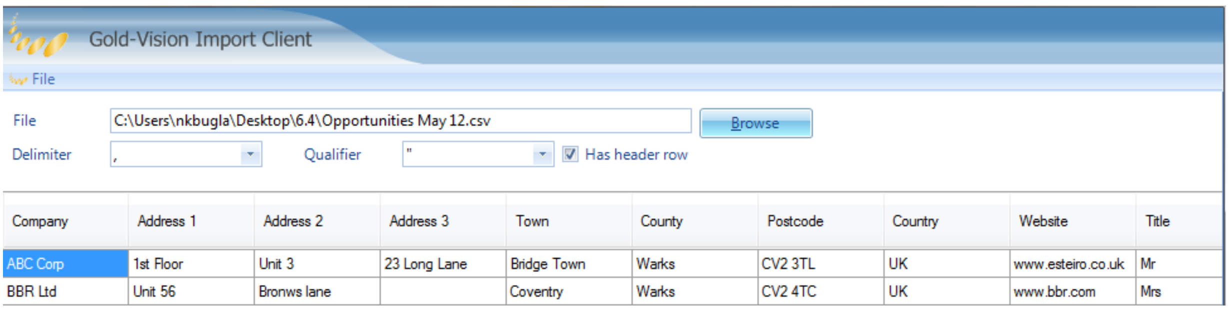
Screen Two:

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.



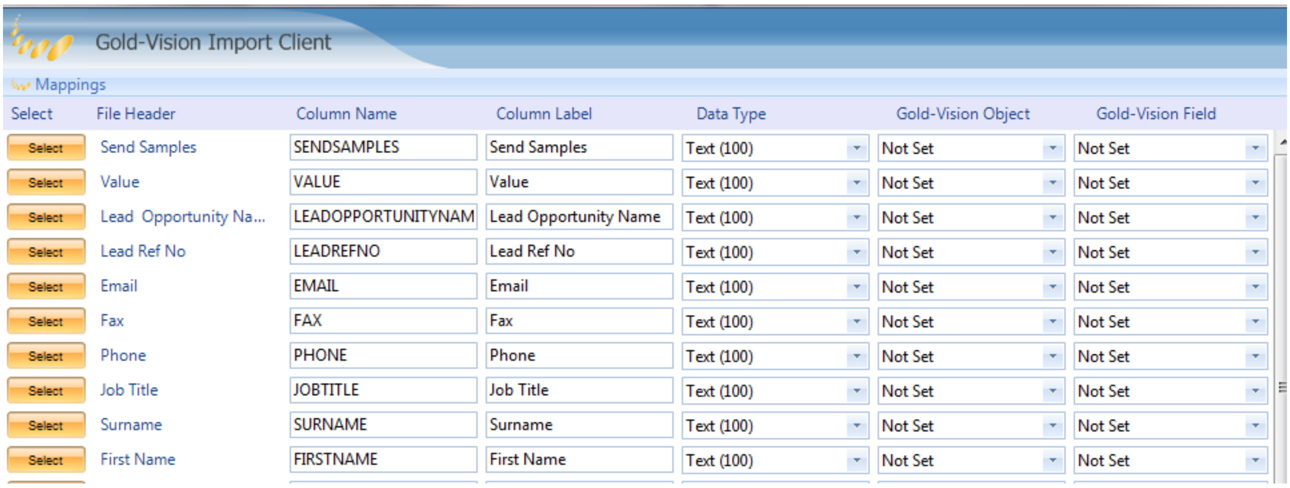

If the Data format looks correct click **Next** at the bottom of the screen.

# Mapping

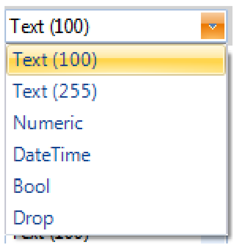
Please setup mapping using the screen below, the table below provides a detailed overview of each column.

(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.)

<u>Screen Four: Setup Mappings</u>

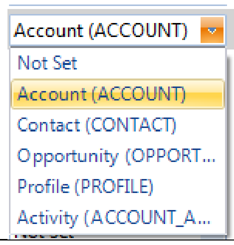



The mappings screen lets you determine where data from the imported list will be applied in Gold-Vision.

| | |
|---|---|
| **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**<br>Select from the drop down eg Text, numeric, date<br>**Bool** = checkbox, your data should be set to either True or False<br>**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. |  |

**Gold-Vision Object**

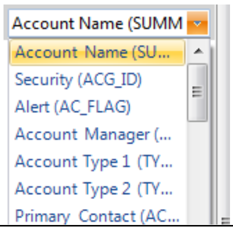
Select the Gold-Vision object from the drop down




**Gold-Vision Field**

Select the relevant field from the drop down

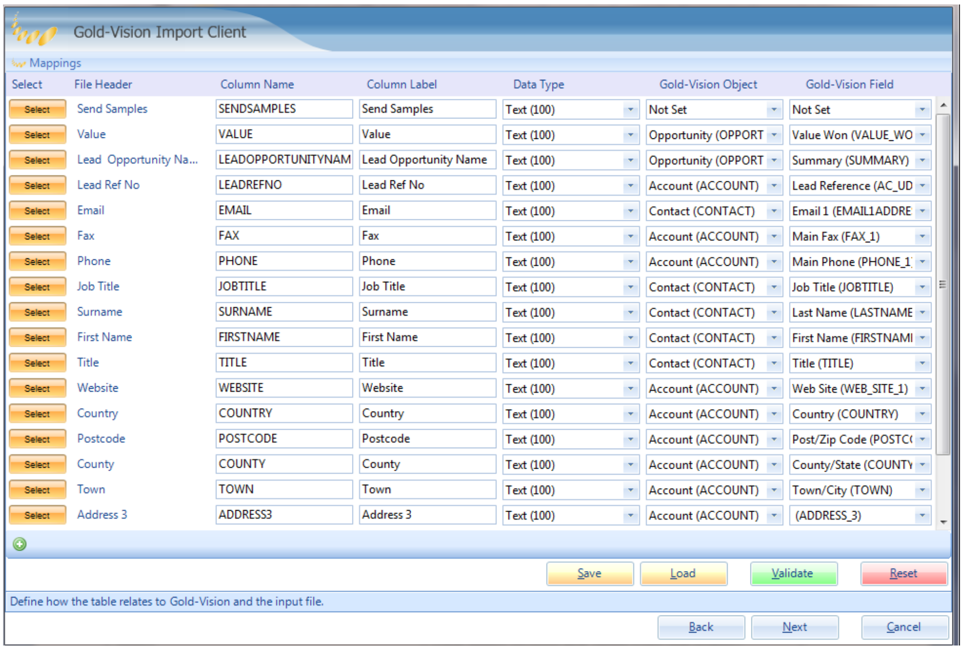
Any fields left as **not set** will be imported into the Lead Management system but will **not be imported into Gold-Vision.**




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

<u>Screen Five: Completed Mapping</u>

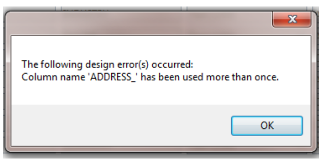
A completed mapping is shown below. The completed mapping should always include some elements of an Account (Company) record, and a Contact will nearly always be present




**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.

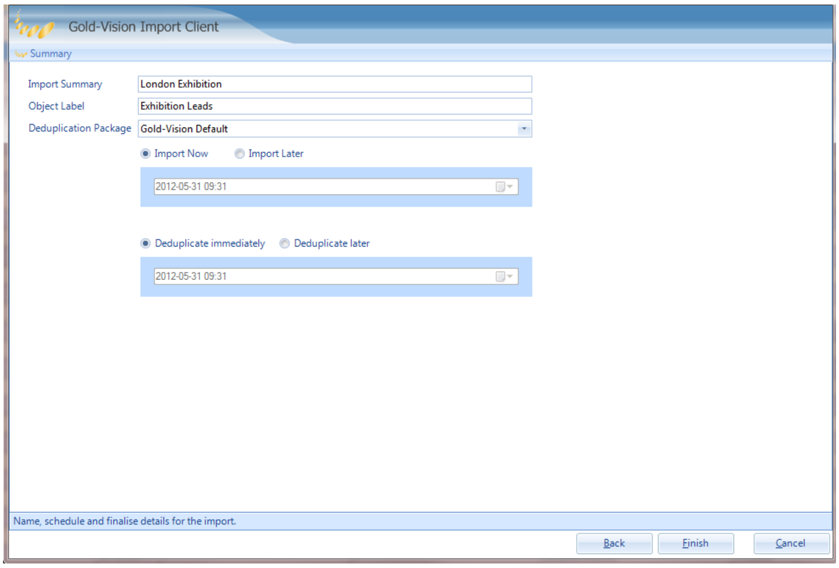
**Import Summary** – Allows you to uniquely name your import eg Internetworld 2012 List or Technology For Marketing2012 List

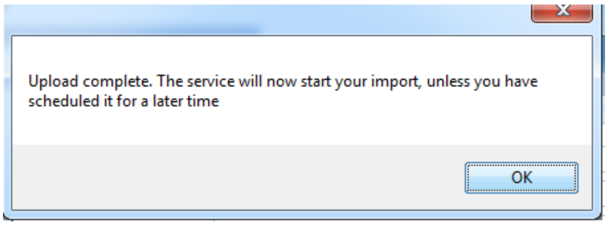
**Object label** –This will identify the list and the screen which is created in Gold-Vision. (If you are updating a mapping this will be populated automatically)

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

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

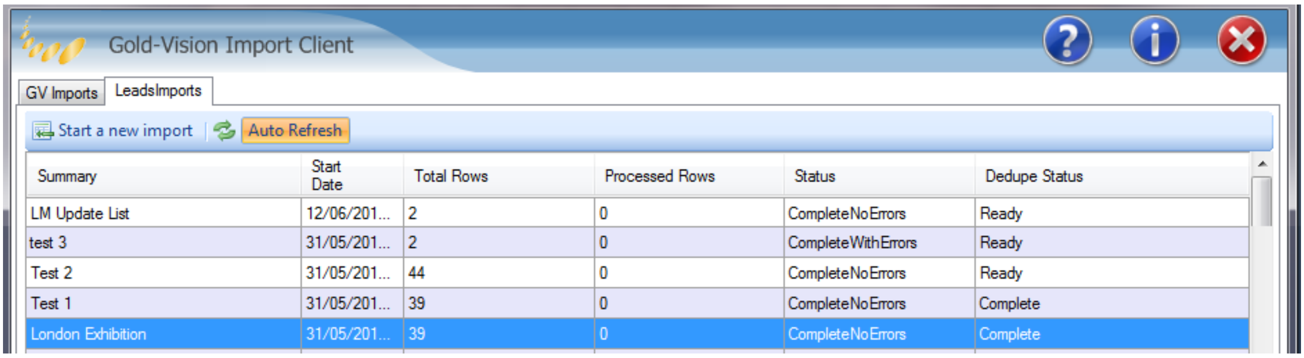
Click **Finish** to Run the import.




Screen Seven: Import Client - Lead Imports screen

Here you can follow the progress of your Import.




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:

a) File header row contains **exactly** the same column names
b) 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.

Control Column Values (if applicable)

| | |
|---|---|
| Update Value | U |
| Insert Value | I |
| Delete Value | D |

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

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

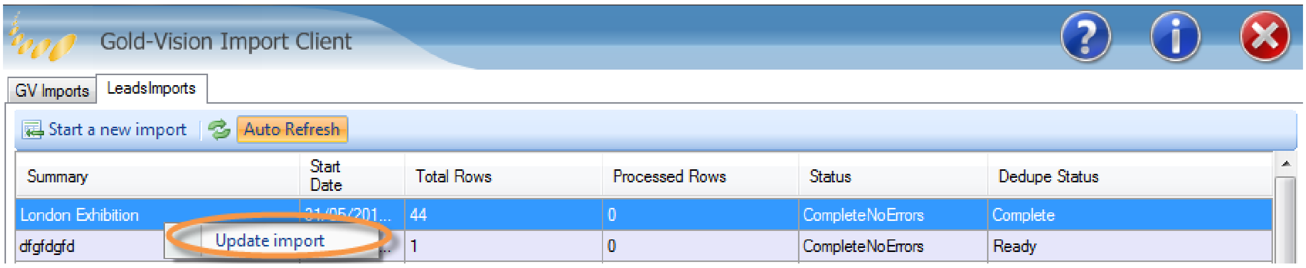
Step Three: During the mapping stage of the import ensure you select your Control Column before progressing.

| | 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. | U |
| 3 | Sir | Cliff | Richard | IT Director | Avrian Logistics L | Bournemouth | UK | 0044 1202 776 88( | 0044 1202 776 887 | 07856 774 556 | cr@avlogistics.co | U |
| 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@gt | U |
| 6 | Ms | Mariah | Carey | Operations Mana | Aspect Aviation | Liverpool | UK | 0044 151 748 300 | 0044 151 748 303 | 0771 886 779 | mcarey@pbcllp.c | I |
| 7 | Ms | Whitney | Houston | IT Director | PBC LLP. | Basildon | UK | 0044 1268 364 90( | 0044 1268 364 908 | 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 97( | 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 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 original import by right clicking on the name of the import and selecting create new import from this.

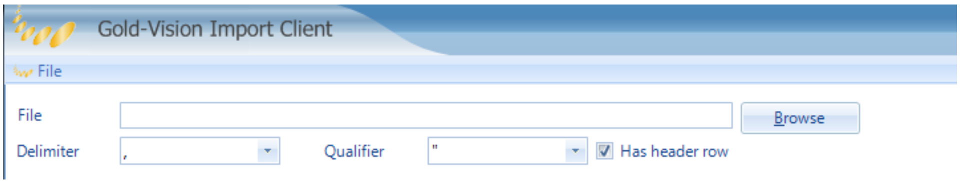
Screen One – Update Import:




**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.**

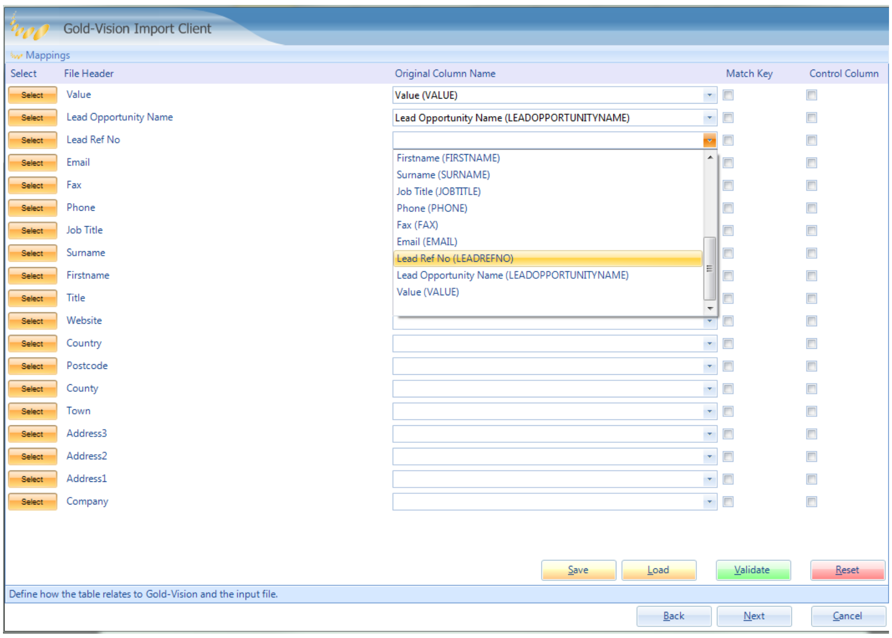
Screen Two:

Click **browse** and select your file.

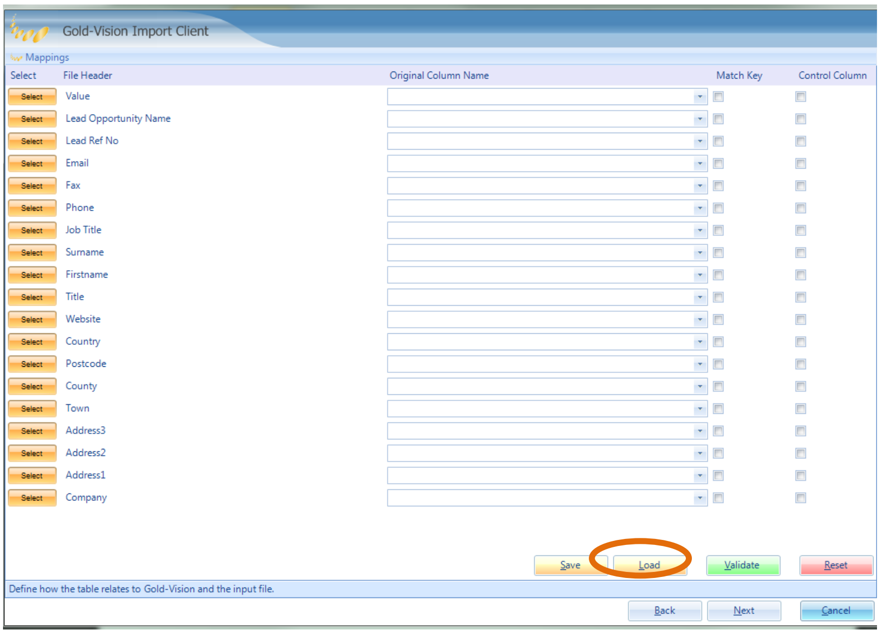



Screen Three – Validate Mapping and Set Match Data:

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.




• **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

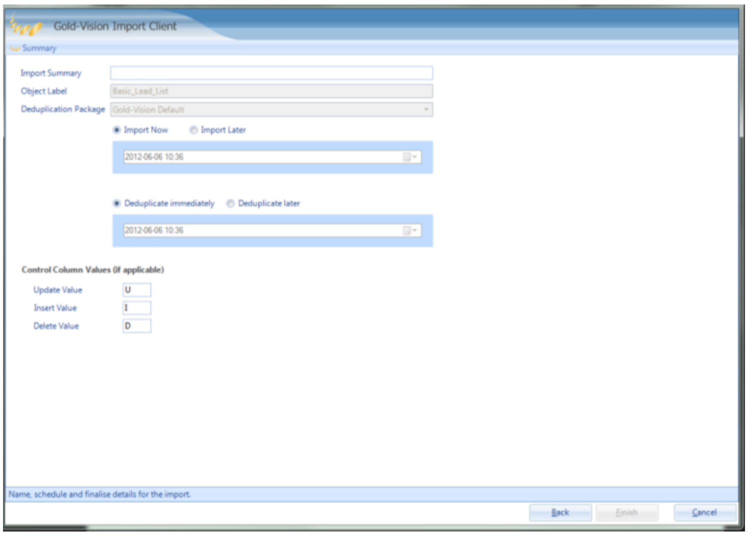
**Object label** – Will be set automatically on update imports.

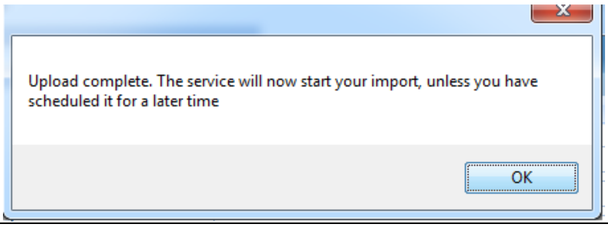
Select to either **Import Now** or **Import Later.**

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.



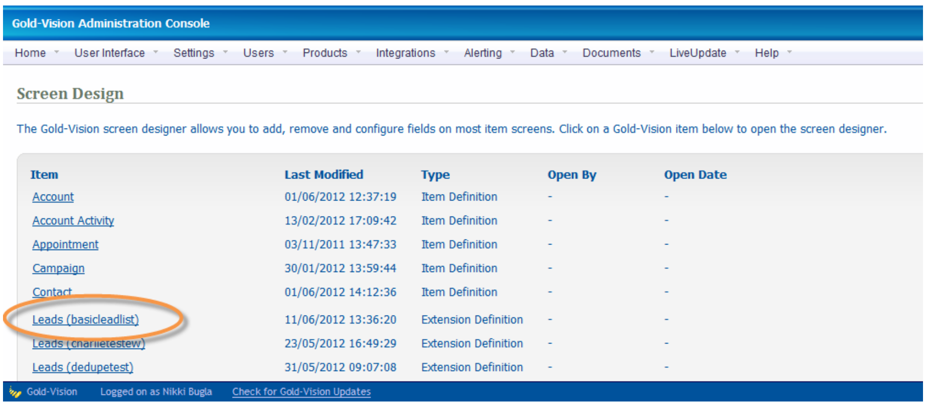




## Gold-Vision Configuration - Lead Screen Design:

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***

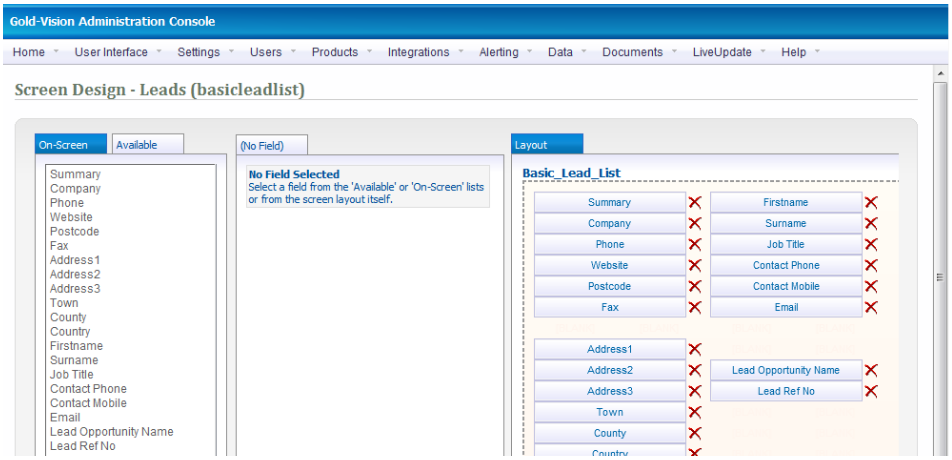



Each imported list has its own associated screen design, which will be used whenever data from that list is actioned.

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.

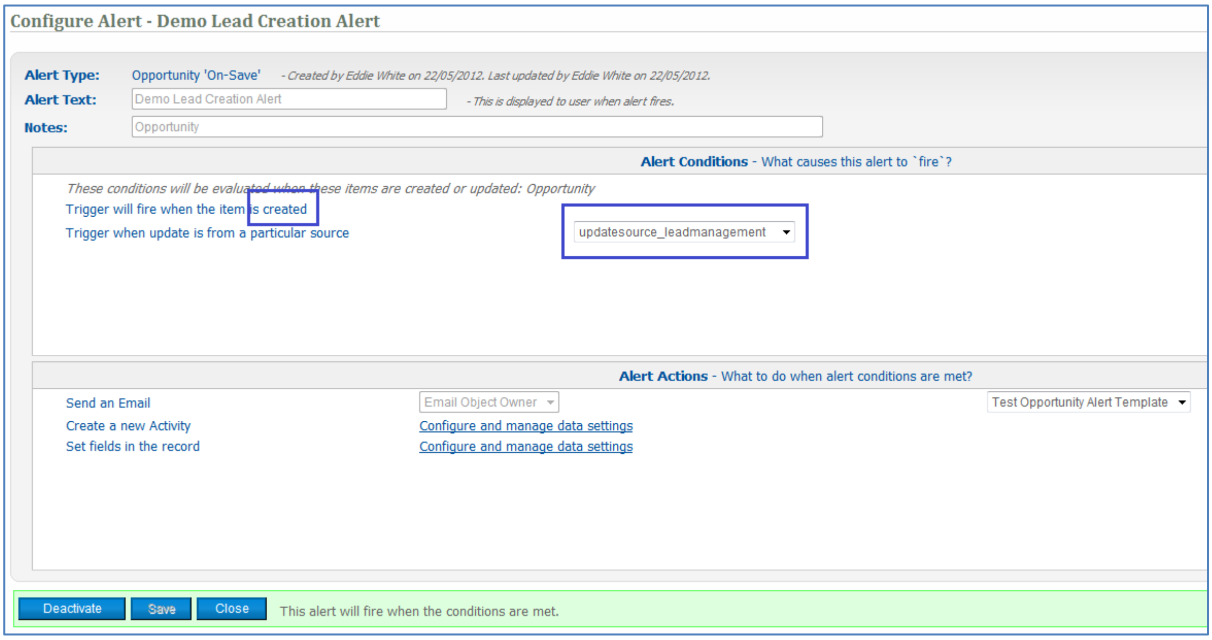
Assuming that promoting the Lead has created a new Opportunity, the workflow below can be used to create follow up actions:

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

Set Conditions: ***Created*** & ***Update Source =' updatesource_Leadmanagement'***

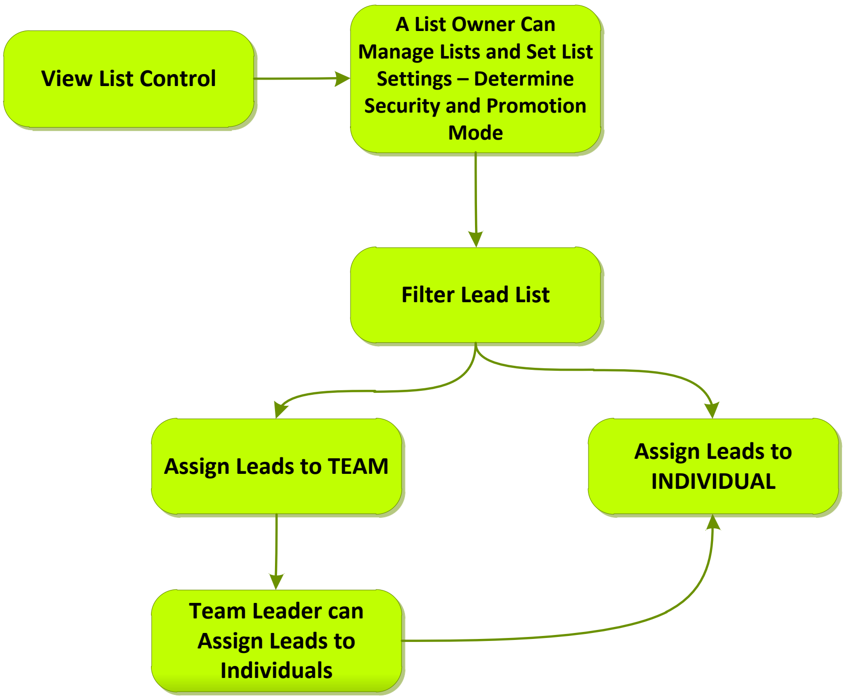
Set Actions:

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

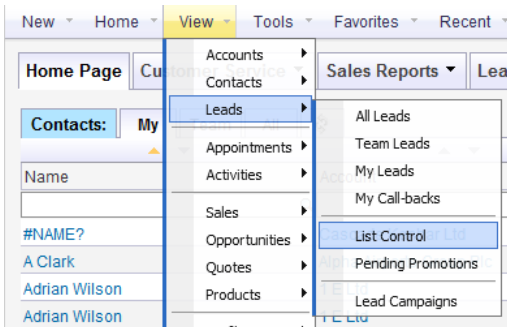



For more information on Alerting/Workflow please see your Account Manager or the Gold-Vision Administration Console Guide.

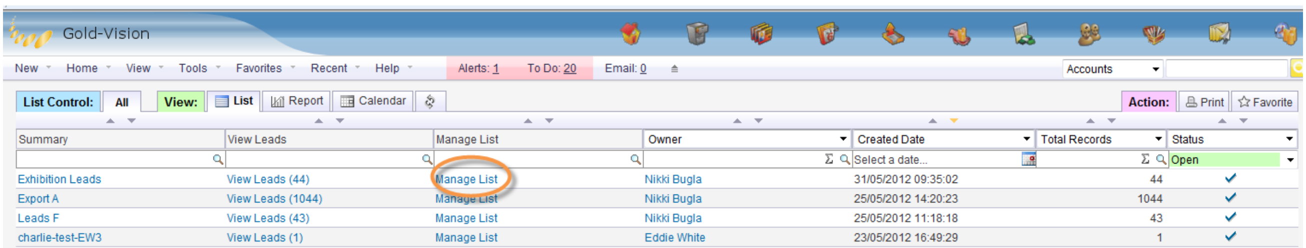
# Assigning Leads for Lead Progression



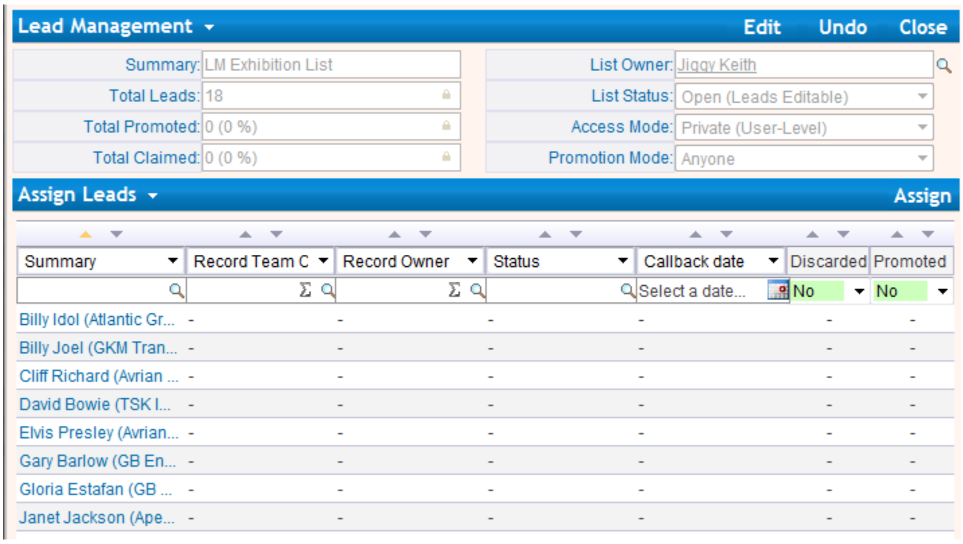

**View → Leads →List Control -** view the imported lists, manage the list, make it available and assign Leads.



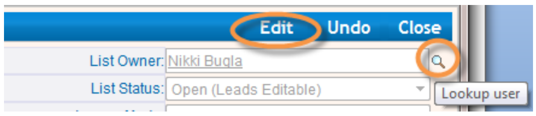
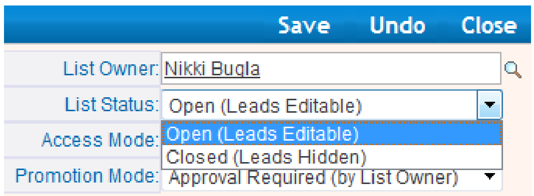
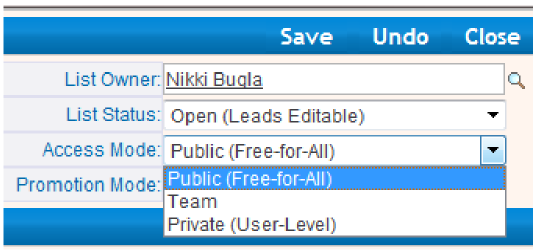

The list of imported lists will be displayed.




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



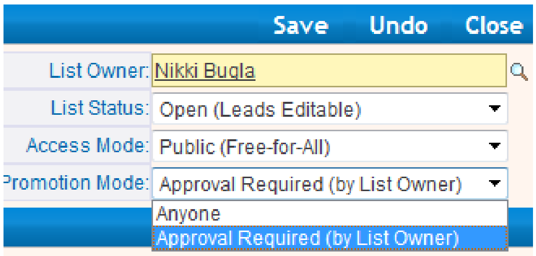

## List Control - Lead Management Settings

| | |
|---|---|
| **List Owner**<br><br>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.<br><br>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<br><br>**Open -** Leads are visible to Lead Management Users<br><br>**Closed** – Leads are hidden. |  |
| **Access Mode (Public/Team/Private)** –<br><br>**Private** - by default. Similar to the main Gold-Vision Account security.<br><br>**Public** - all users can see all Leads.<br><br>**Private -** users can only see Leads which have been allocated to them.<br><br>**Team -** users can only see Leads which have been allocated to the Team to which they belong |  |

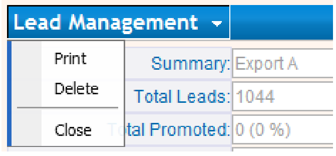
**Promotion Mode** - (Anyone/Approval Required)

**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

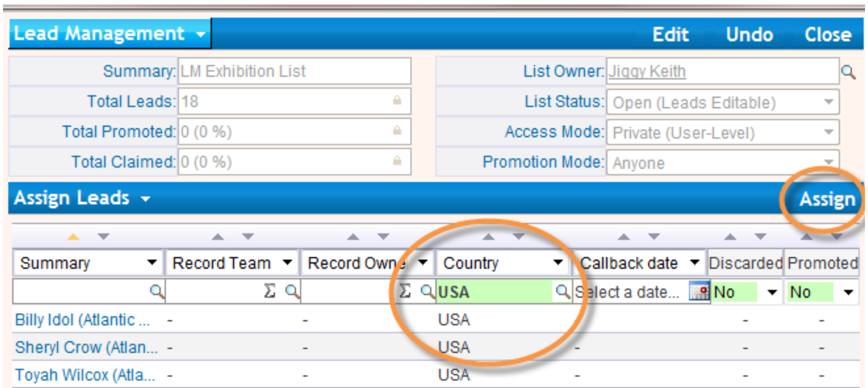



## Assigning Options - Assign to an Individual

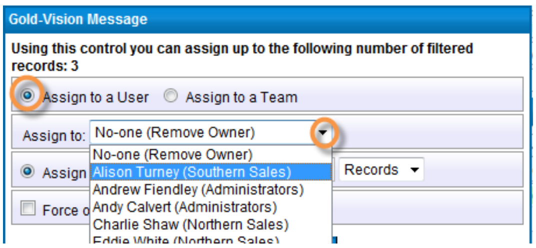
You may wish to filter Leads. For example you may want to assign all leads from a particular country to an individual user.

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

Click **Assign**




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

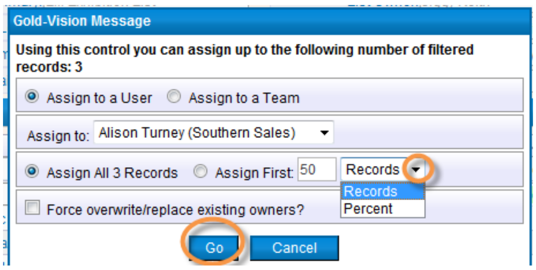



You can either

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

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

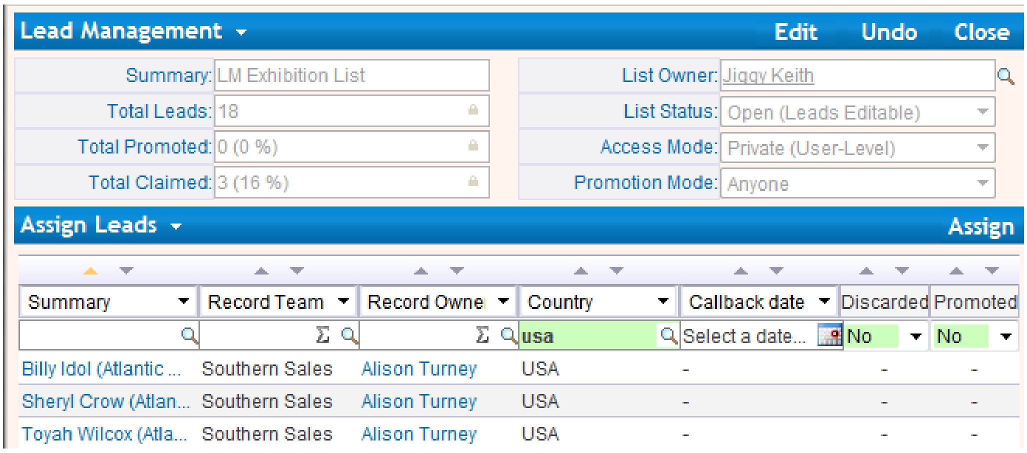
**Force Overwrite –** This will replace the owner if



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.

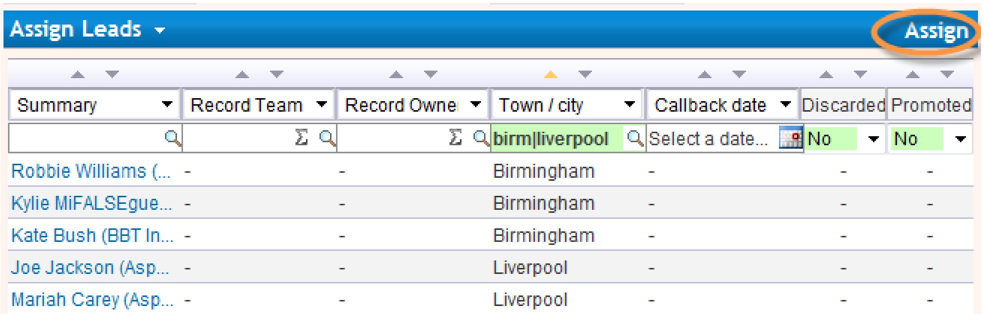



## Assigning Options - Assign to a Team

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

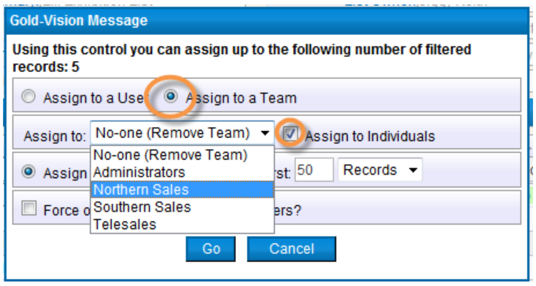
Click **Assign**




Select **Assign to a Team**

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

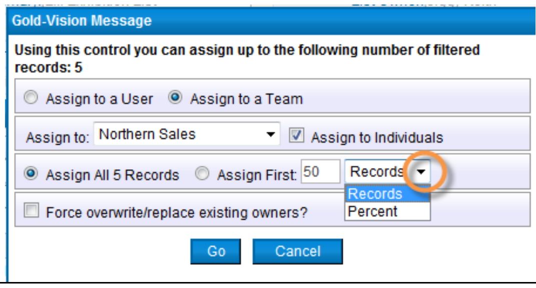
If you wish to assign to individual members of the team (rather than make the Leads available to any member of the team) tick **Assign to Individuals**



Select Assign All records or a certain number or percent

Click **Go**

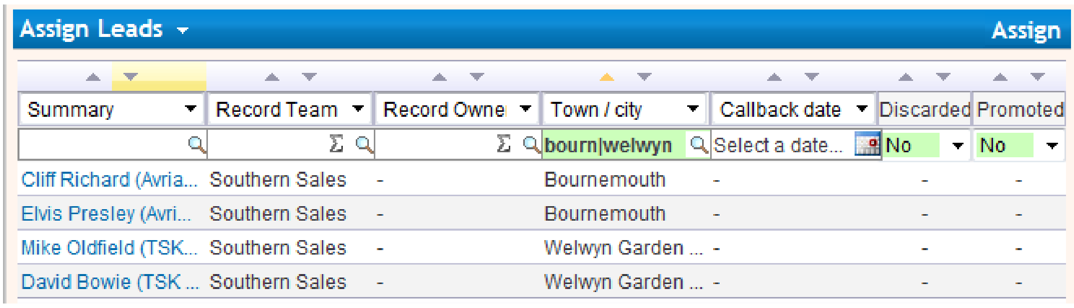
Leads will be assigned to the members of the team.





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




**List Owner**

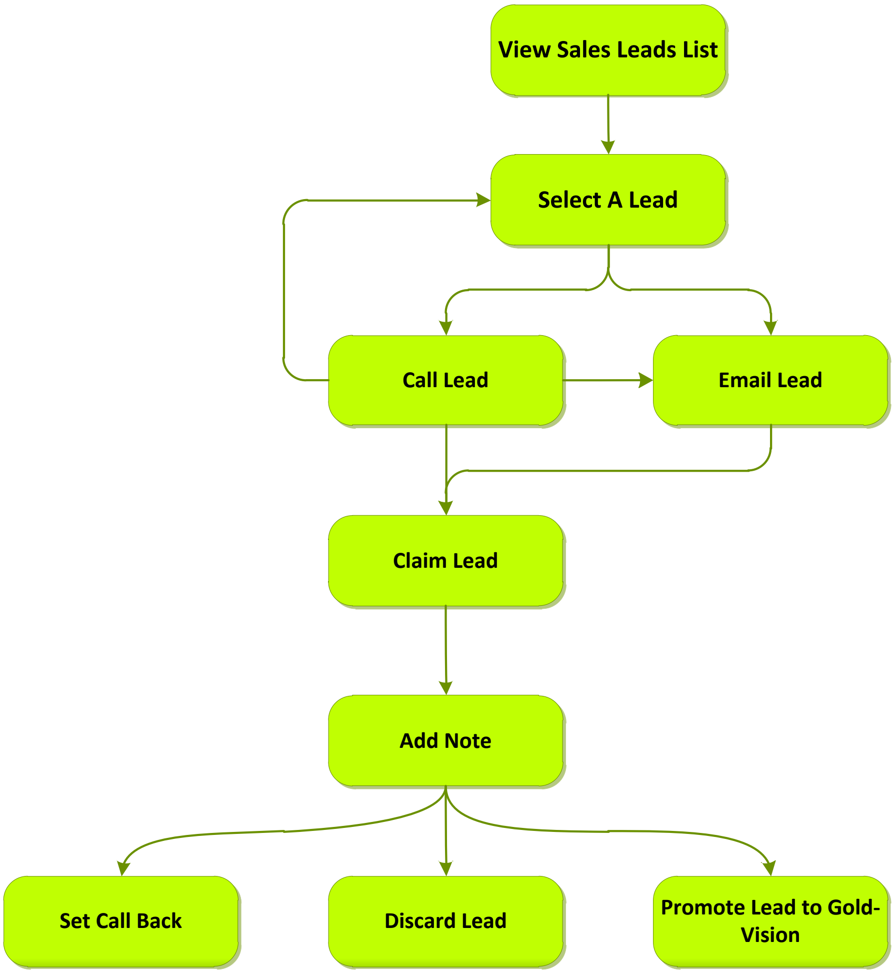
A list owner (and a Gold-Vision system administrator) can change the settings of the list (Owner, Status, Access Mode and Promotion Mode) and assign ANY Leads.

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

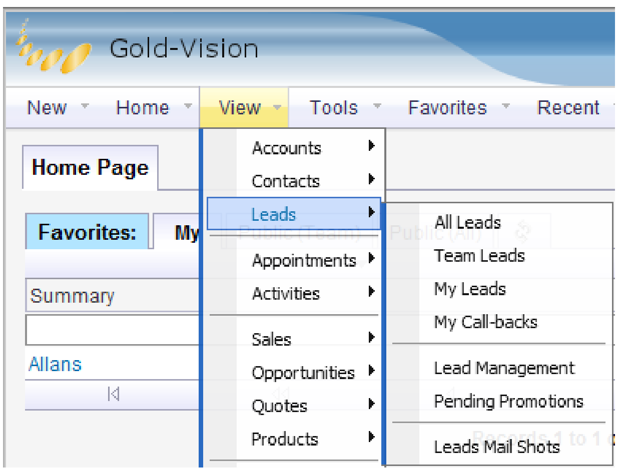
**Team Leader**

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




.

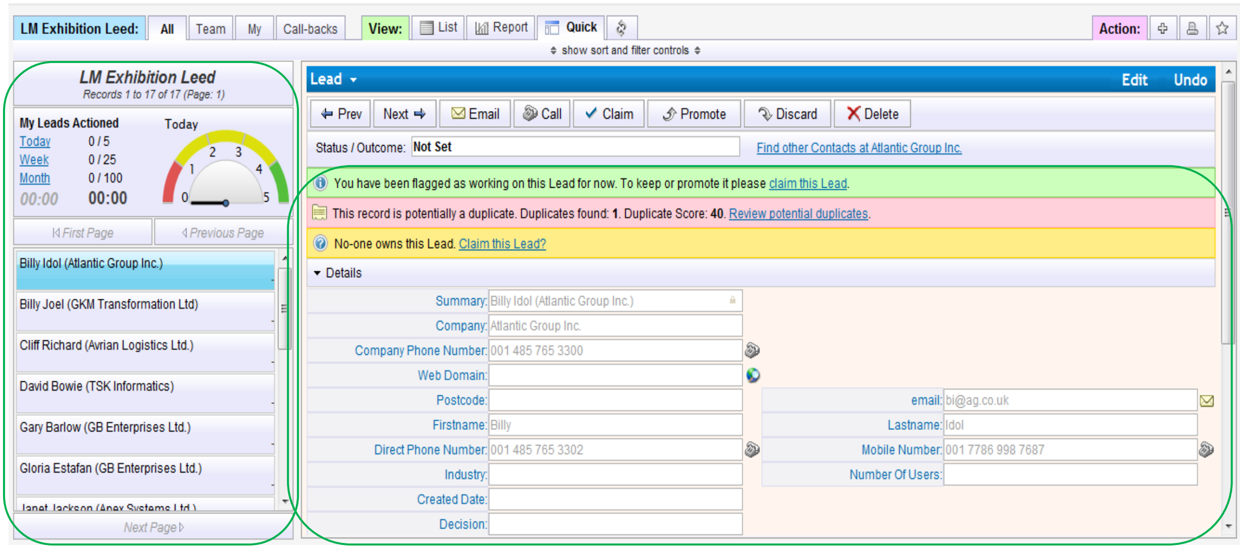



- **All, Team, My Leads** - Takes the user to the respective tab of the general Leads view.
- **Call-backs** - Takes the user to the **call-backs** tab where they can see their scheduled call-backs. This process is described below.
- **Lead Management** - Takes the user to a list of Lead imports where 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.

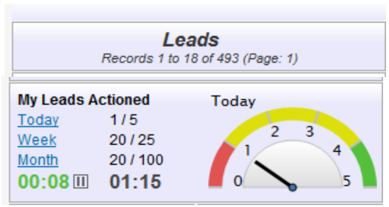
## Viewing Leads - all Leads

**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.



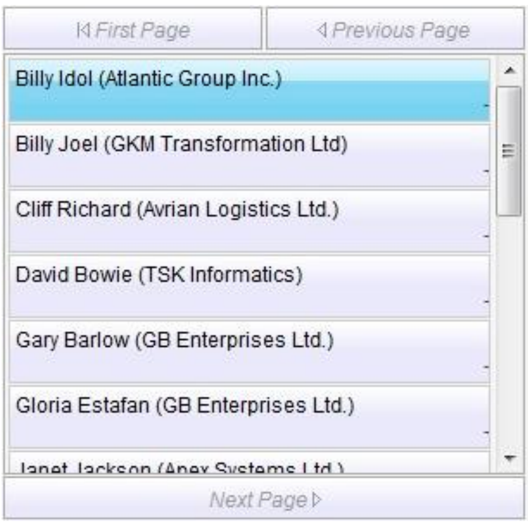

**Actioned Lead Performance** - A summary of Lead performance in terms of number of Leads 'actioned' by the user against their 'target' as defined under the Admin Console. (Please see Lead management setup guide to see how to set user targets). (Actioned Leads are Leads where the outcome has been updated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




**Timers**- if the Lead belongs to the current user

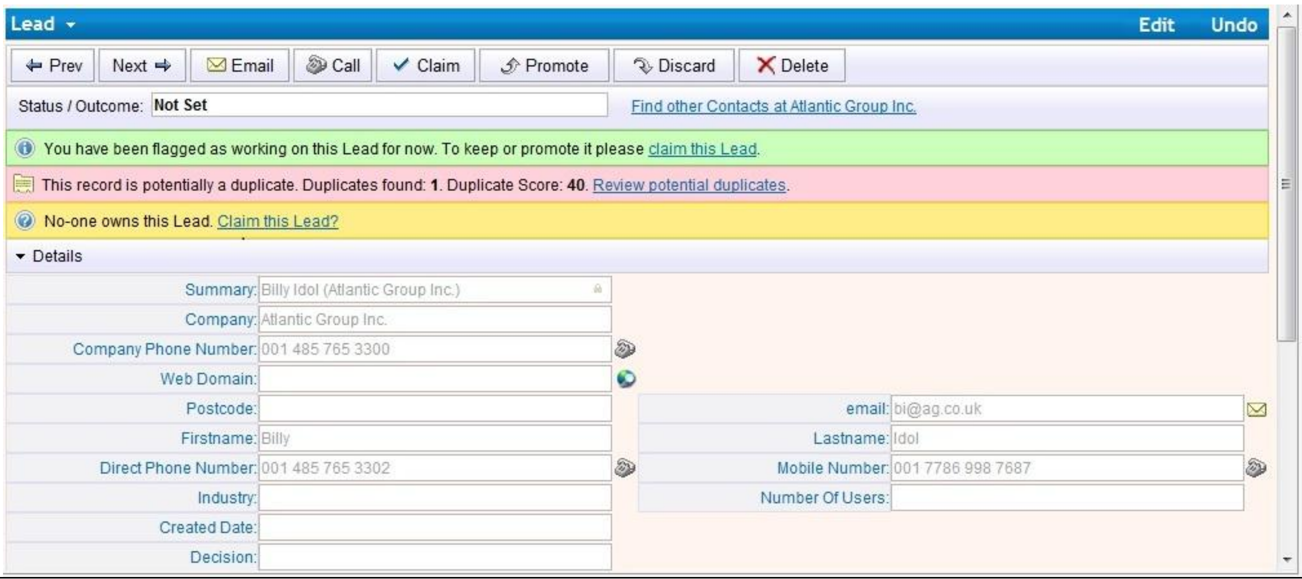
Timer on the **left** is the amount of time spent on this Lead in the current session

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)

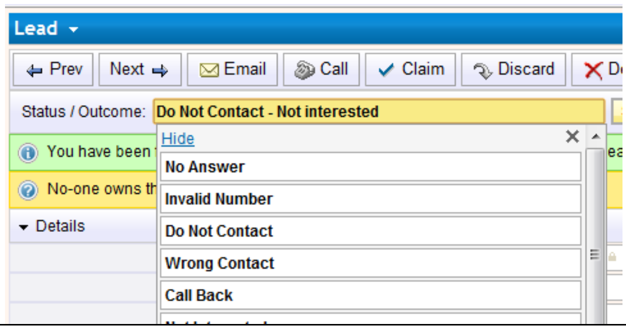
**Call Back** - Allows the user to save a date and time to call the Lead back. This will make the Lead appear under the 'Call-backs' tab

**Promote** - Displays the promotion control.

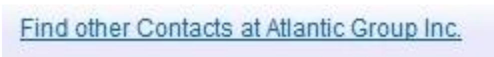
**Discard** – If no linger wish to be the owner of the Lead this action removes ownership of the Lead as well as flags it as "discarded".

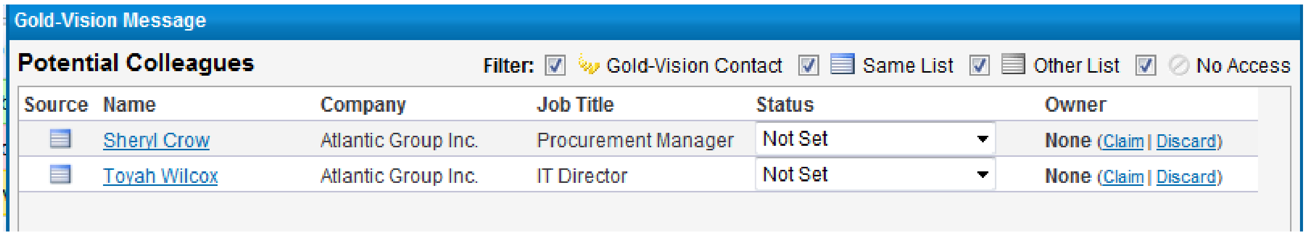
**Delete** - Deletes the record completely.

**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.

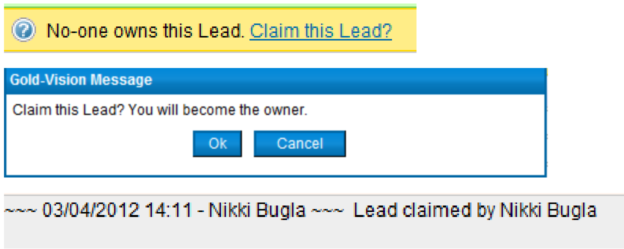




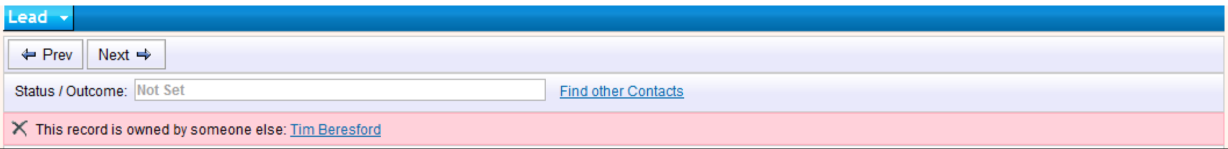

Source of the other Contacts

**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

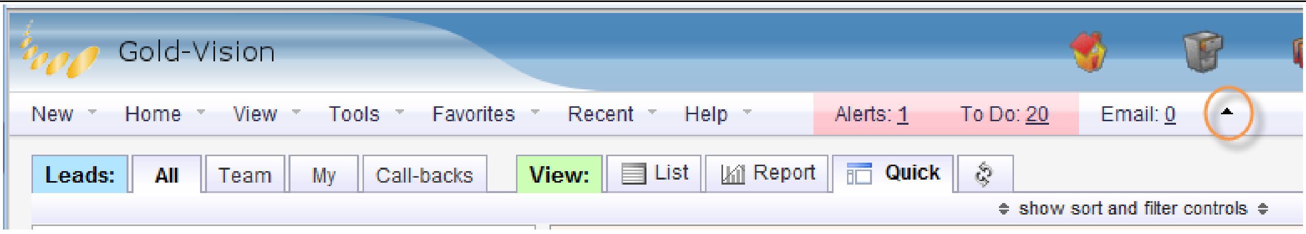
**Unclaimed Leads** can be claimed by clicking this link
A note is added as confirmation that the Lead has been claimed.




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



## 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)

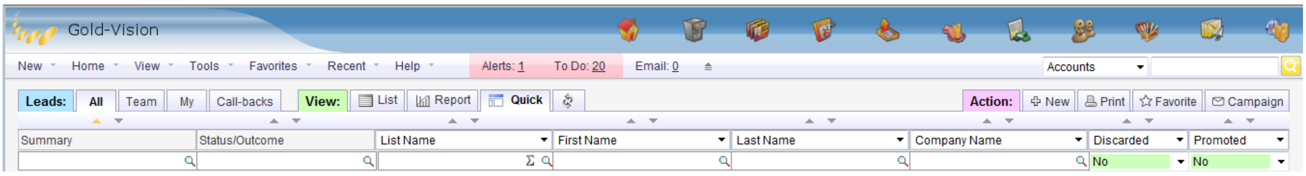
**View:**

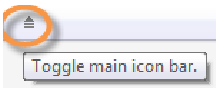
**List** – standard Gold-Vision list view

**Report** – create and view charts and reports

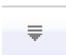
**Quick** – default view of Leads as above

**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.

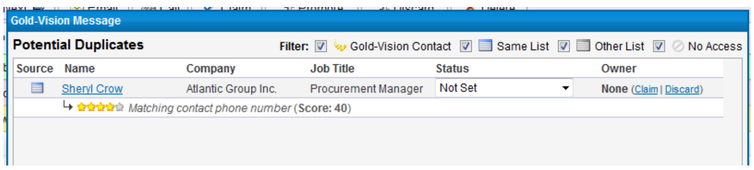
<table>
<tr>
<td>

**Duplicate Source:**

**Gold-Vision Contact** – this indicates potential duplicates in your main Gold-Vision database<br>
**Same list** – identifies potential duplicates in the same imported list<br>
**Other List** – identifies potential duplicates in any imported list<br>
**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.

</td>
<td>




See **Appendix B** for full details

</td>
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<tr>
<td colspan="2">

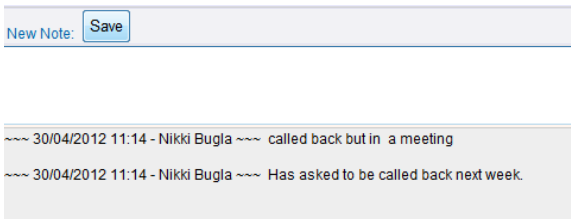
Other fields on the screen are configurable in the Administration Console.

</td>
</tr>
<tr>
<td>

**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.

</td>
<td>

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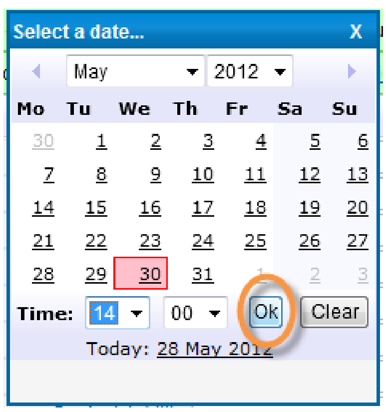
<tr>
<td>

**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.

</td>
<td>

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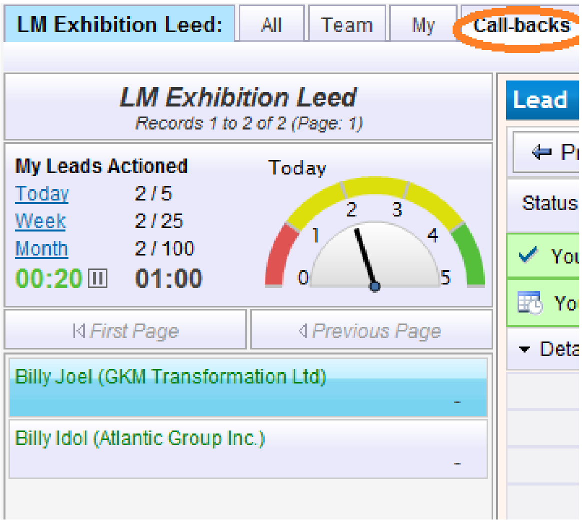
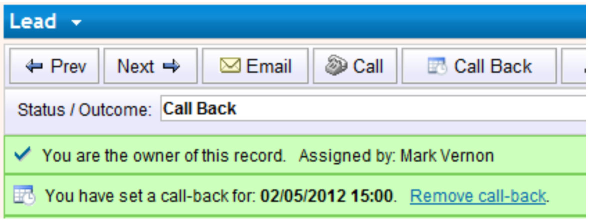
<tr>
<td>The Call-backs tab shows a list of your Call-backs.</td>
<td>
</td>
</tr>
<tr>
<td>When you have made the call click Remove Call-Back to remove from your list of call backs.</td>
<td>
</td>
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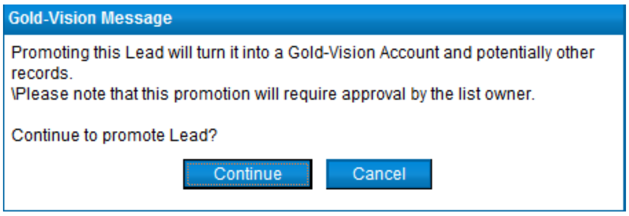
## Promoting Leads

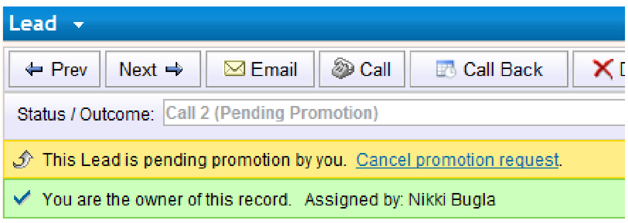
Leads can be promoted into the main Gold-Vision Account and Contact system by using the **Promote** control. There are two settings for this process –

- 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)

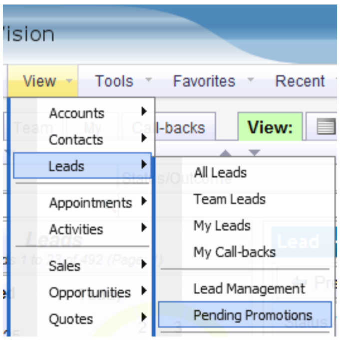
Click **Promote** on the Lead record

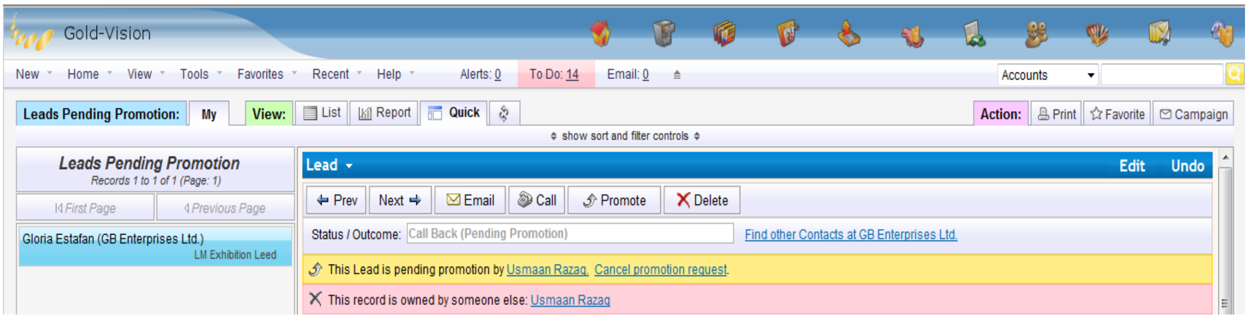



<table>
<tr>
<td>The Lead Record is updated to show it is pending promotion.<br><br>Click Cancel if you no longer wish this record to be promoted.</td>
<td>
</td>
</tr>
</table>

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.

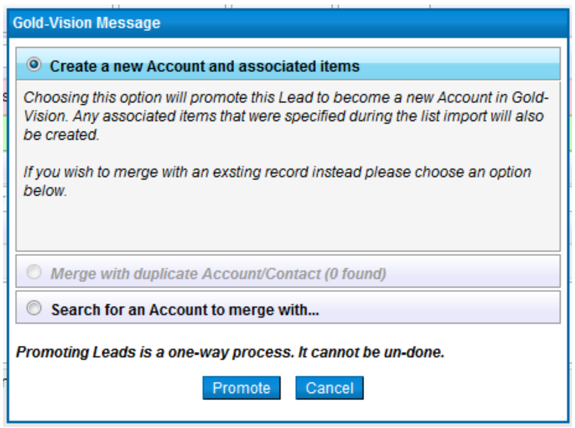


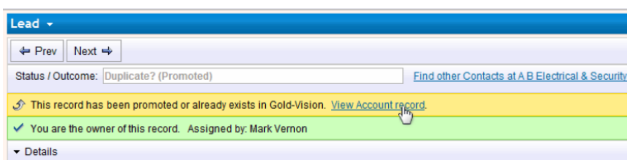

## Option 2- Anyone can promote

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.

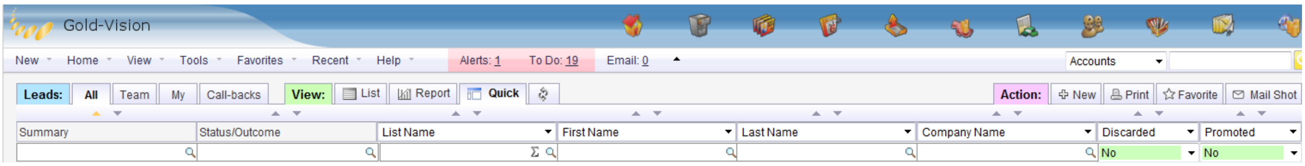



Once a Lead has been promoted it is no longer editable within the Lead system, however, a link to the promoted Account is displayed Contacts will be created and Notes will be copied in the Account record

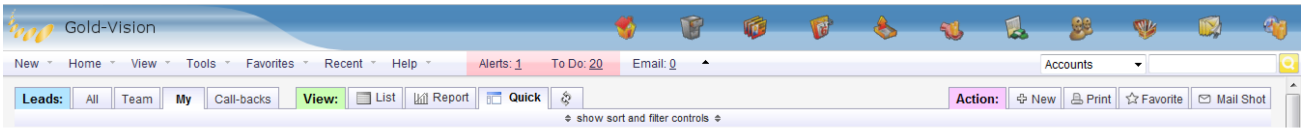


## Searching for Leads

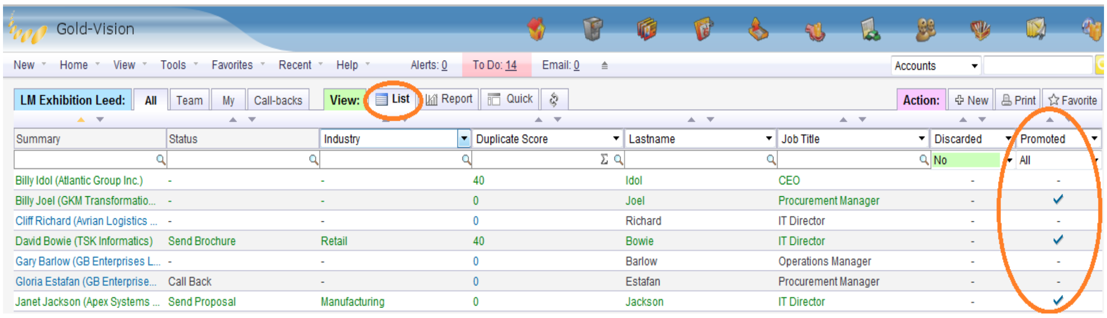
The standard Gold-Vision column heading and search facility are available.




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




Viewing Promoted Leads

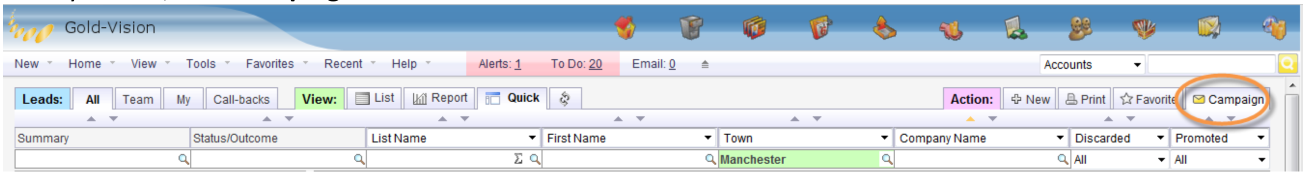
# Lead Campaigns

Lead lists can be used for direct communications and either

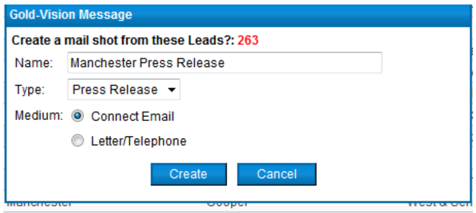
- Uploaded to Gold-Vision Connect to be sent as a mailshot
- Used to create a telephone campaign
- Exported to Excel for use with Word Mail merge

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

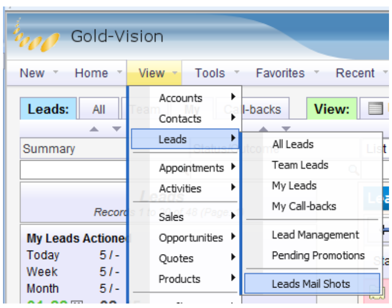
Click Create

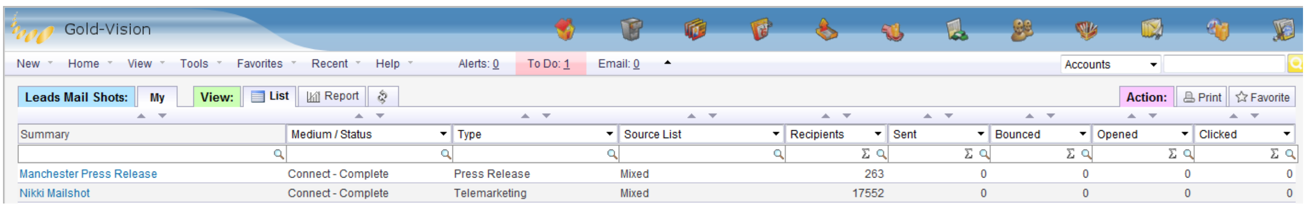
This will upload the recipients to Connect and create a new mail shot.
(Please note: You must have an active Connect account and user access to Gold-Vision Campaigns.)

**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.



## Option 2 - Telephone Campaign

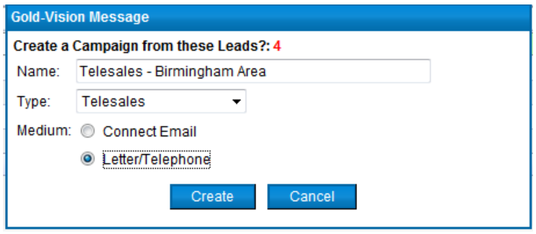
Filter your list, click **Campaign**

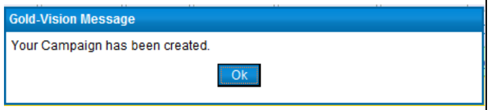
Enter a name for your mailshot

Select a Type

Select Letter/Telephone

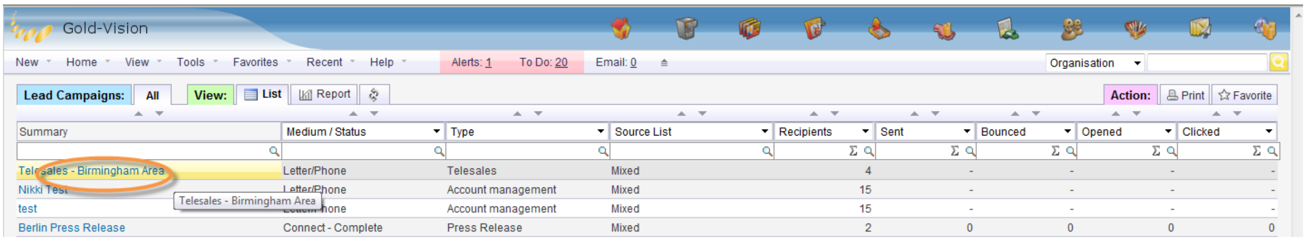
Click Create

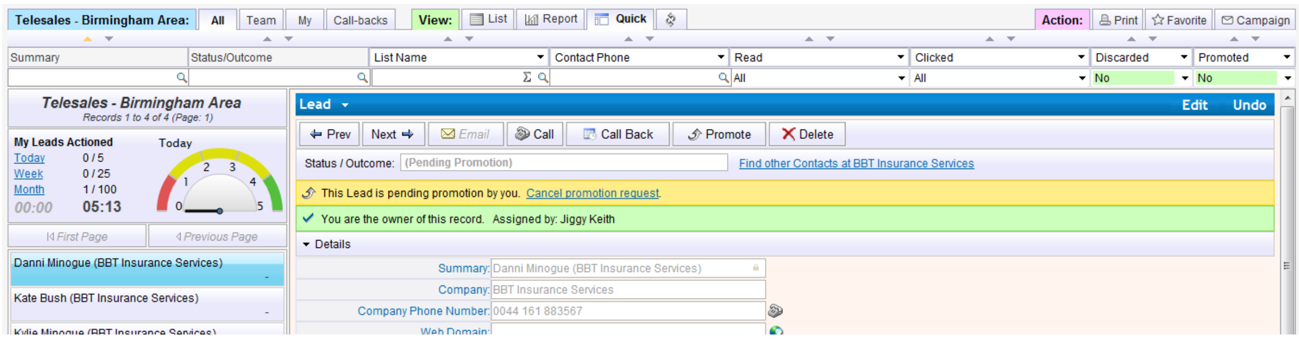



**Working on the Telephone Campaign**

**View →Leads → Leads Campaigns**





## Option 3 - Word Mail Merge

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

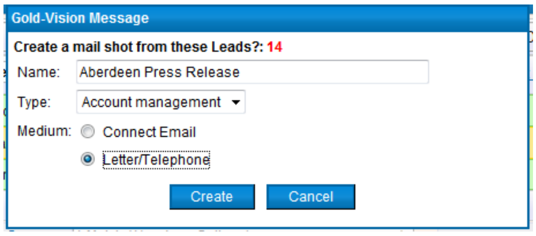
Filter your list and click **Campaign**

Enter a name

Select a Type

Select Letter/Template

Click Create

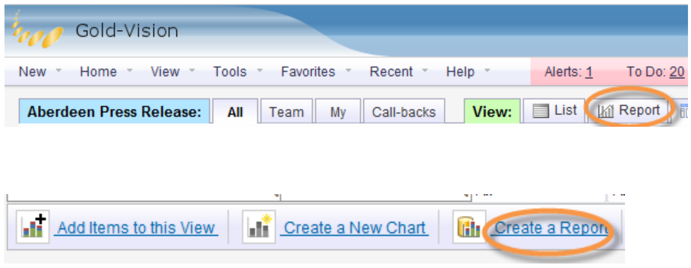



<table>
<tr>
<td>

**View →Leads → Leads Campaigns**

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

</td>
<td>

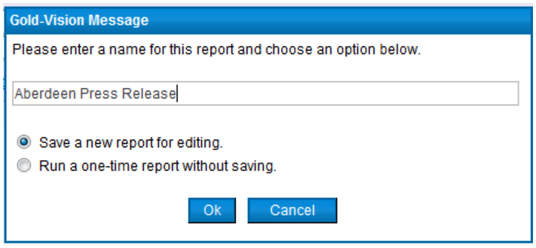



</td>
</tr>
<tr>
<td>

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

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

</td>
<td>



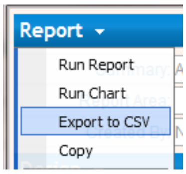

</td>
</tr>
<tr>
<td>

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.

</td>
<td>




</td>
</tr>
</table>

# 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.<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

## 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:

| ***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