

Intro to the Leads Tab

The Leads Tab is where you can monitor your lead activity.

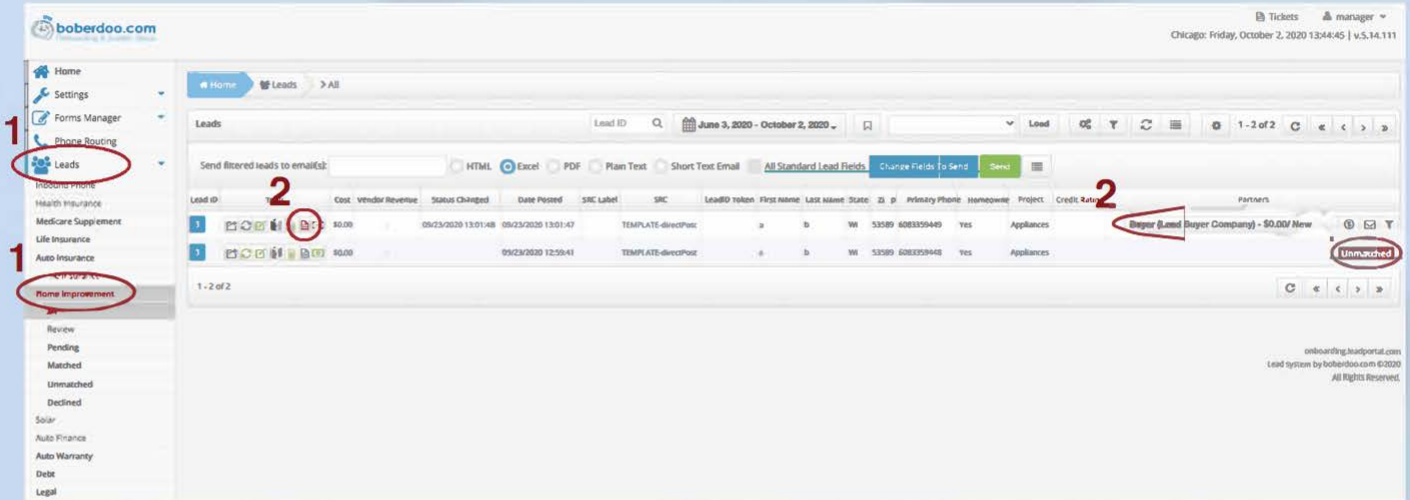
Step 1

In the Leads tab, select the Lead Type to view (here Home Improvement is selected.)

Step 2

The Leads tab has many useful tools:

- Lead Log
- Lead Status
 - Sold lead
 - Unmatched lead



Related Links



Main Page



Video



Support Page

Filtering Leads

The Filter tool permits you to search for leads with common attributes such as a date range, common buyer, or many other criteria.

Step 1

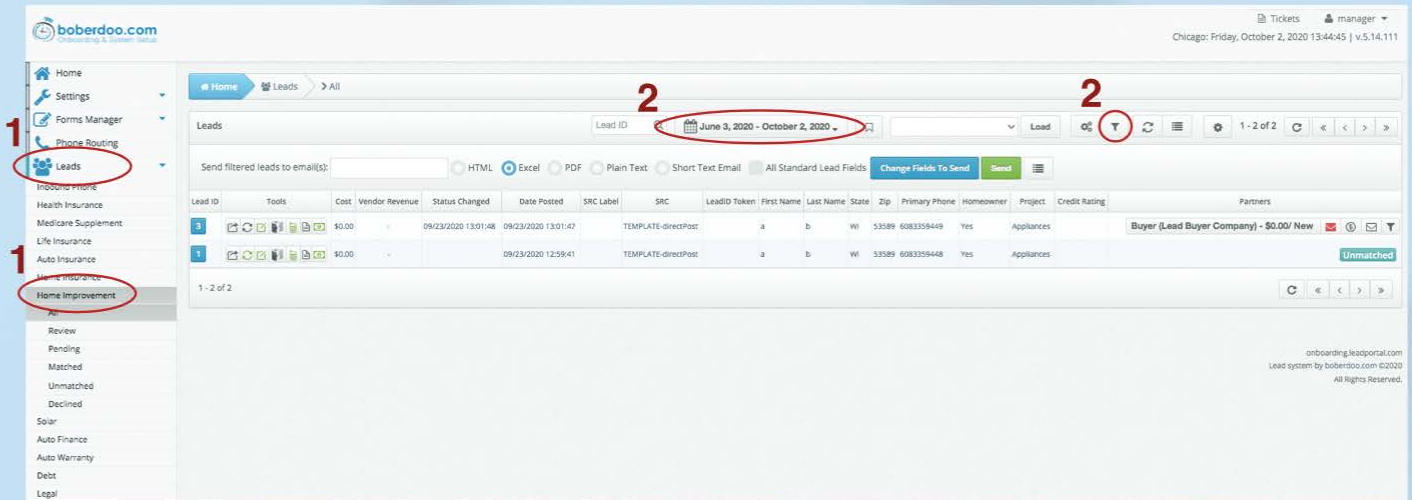
If you're not there already, go into the Leads tab, select the Lead Type to view (here Home Improvement is selected.)

Step 2

Select a desired date range.

Step 3

Click the Filter button to select your criteria.



The screenshot shows the boberdoo.com interface. On the left sidebar, the 'Leads' menu item is circled in red with a '1'. Below it, 'Home Improvement' is also circled in red with a '1'. In the main content area, the 'Leads' tab is active. A date range filter 'June 3, 2020 - October 2, 2020' is circled in red with a '2'. To the right of the date range, a filter icon (a funnel) is circled in red with a '2'. Below the filter, there are options for 'Send filtered leads to email(s):' and 'Change Fields To Send'. A table of leads is displayed with columns: Lead ID, Tools, Cost, Vendor Revenue, Status Changed, Date Posted, SRC Label, SRC, LeadID Token, First Name, Last Name, State, Zip, Primary Phone, Homeowner, Project, Credit Rating, and Partners. Two lead entries are visible, both with a status of 'Unmatched'. The bottom right corner of the interface contains the text: 'onboarding.leadportal.com Lead system by boberdoo.com ©2020 All Rights Reserved.'

Related Links



Main Page



Video



Support Page

Filtering Leads

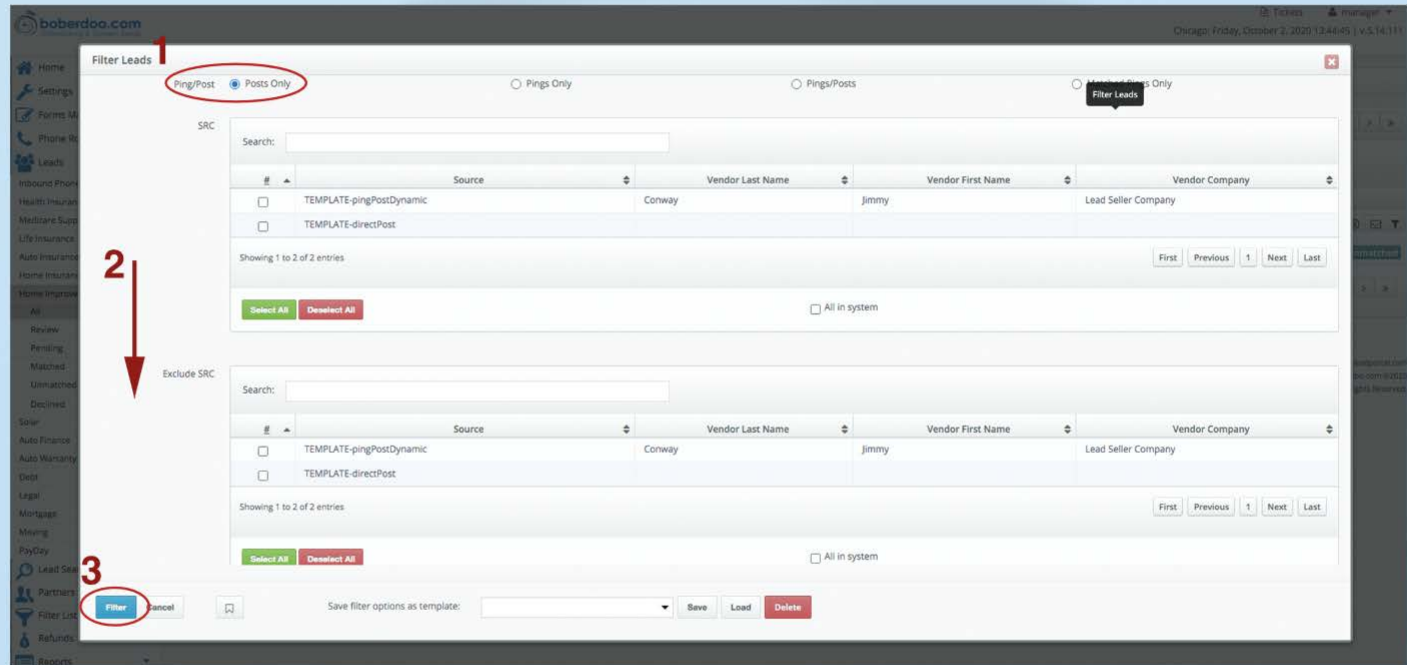
The Filter tool permits you to search for leads with common attributes such as a date range, common buyer, or many other criteria.

Step 1

You can select if you want to view only leads that were pings in your system, or you can select posts (or combinations of.)

Step 2

Scroll down to add additional criteria to your search of leads in the Filter tool. Options include the criteria in the filter sets such as Source, Partners, Lead ID Number, etc.



Step 3

After you select your criteria, click the Filter button. Once the results are displayed, adjustments can be made to the date range.

Related Links



Main Page




Video

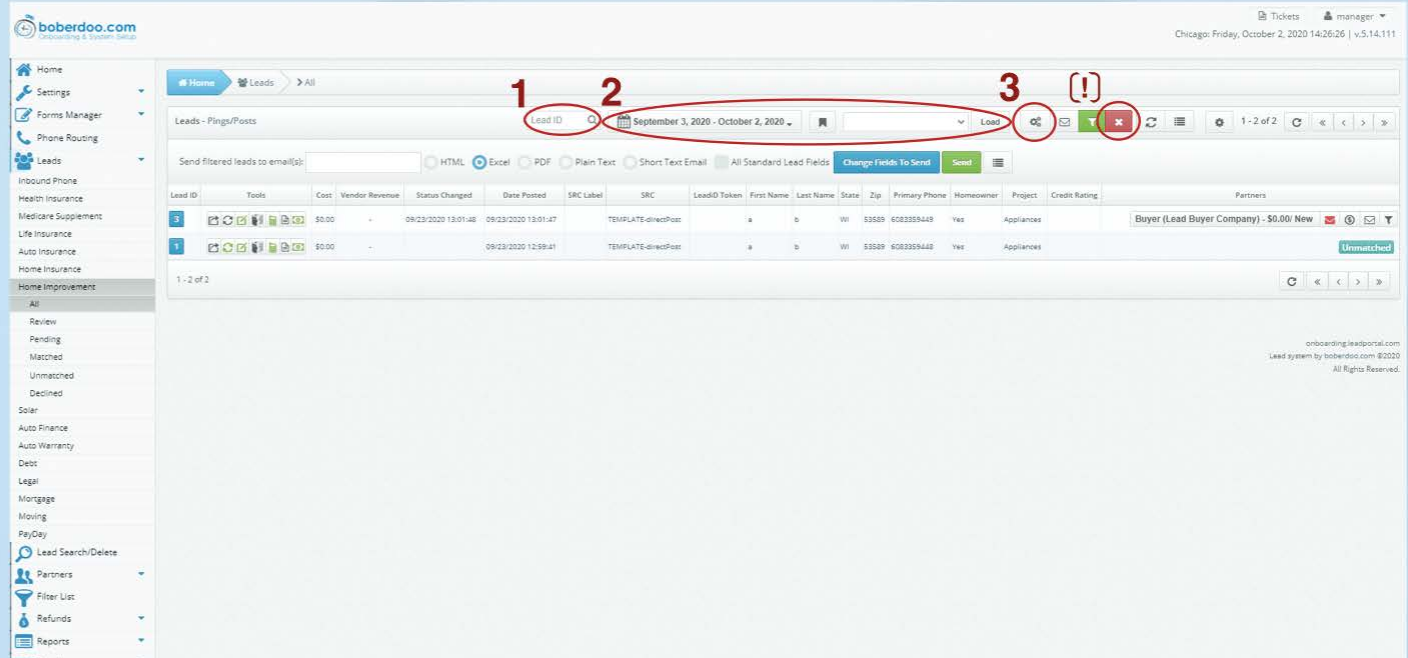


Support Page

Other Useful Leads Tab Tools

Before running a new Leads Filter search, the old one needs to be cleared.

- 1
Quick search by Lead ID number.
 - 2
Saved date ranges and filters.
 - 3
Column Priority Configuration - permits hiding columns in the Leads tab display
-  Before running a new Leads Filter search, the old one needs to be cleared.



The screenshot shows the boberdoo.com Leads tab interface. Three red circles and a red oval highlight specific features:

- 1**: A red circle around the 'Lead ID' search input field.
- 2**: A red oval around the date range filter 'September 3, 2020 - October 2, 2020'.
- 3**: A red circle around the 'Load' button.

A red warning icon (!) is also present in the top right corner of the interface. The main table displays lead data with columns: Lead ID, Tools, Cost, Vendor Revenue, Status Changed, Date Posted, SRC Label, SRC, LeadID Token, First Name, Last Name, State, Zip, Primary Phone, Homeowner, Project, Credit Rating, and Partners. Two lead entries are visible, both with a status of 'Unmatched'.

Related Links



Main Page



Video



Support Page