**boberdoo.com**
Onboarding & System Setup
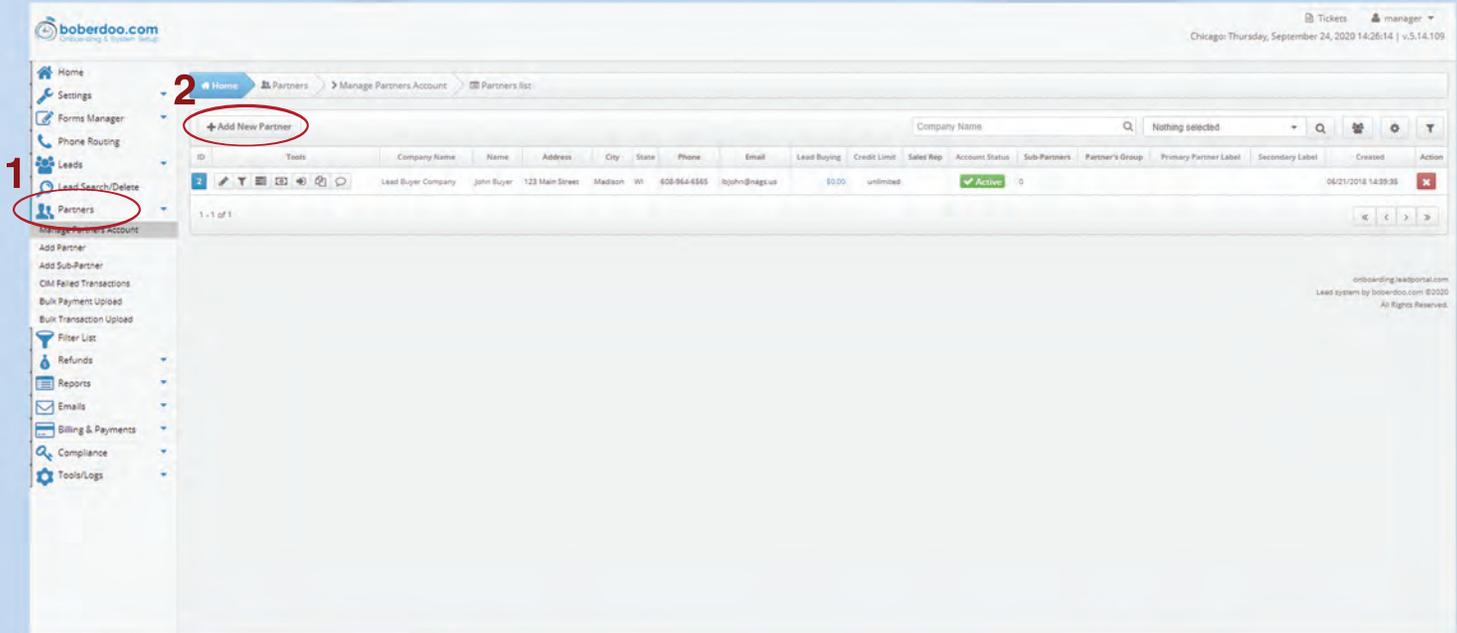
## Creating a New Partner

Partners are the same as your lead buyers. Create partners in your system to sell leads.

**Step 1**

Select the partner tab and the Managing Partners Accounts sub-tab to start.

**Step 2**

Then select the Add New Partner button and fill out the fields that pop up to add a new source.



## Related Links

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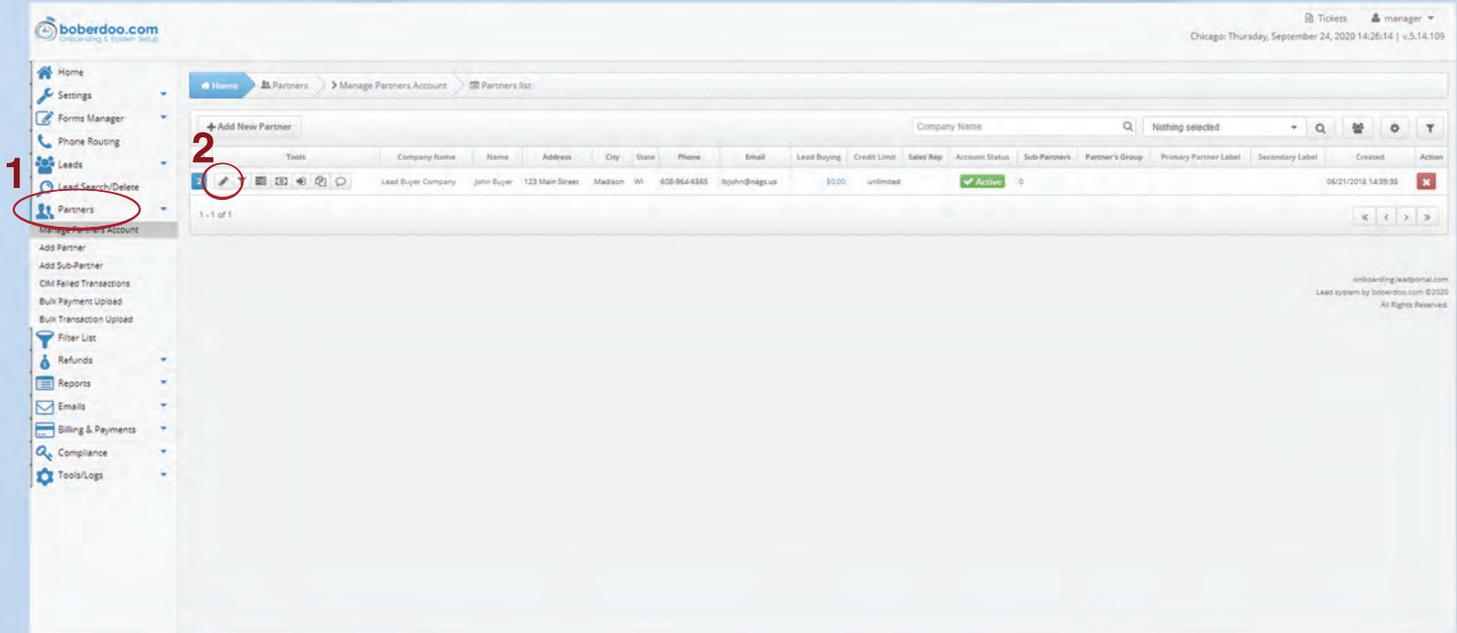![boberdoo.com Onboarding & System Setup]

## Editing a Partner

Partners are the same as your lead buyers. Create partners in your system to sell leads.

**Step 1**

If you have not already done so, select the Partners tab and Manage Partners Account sub-tab to get started.

**Step 2**

In the Partners tab, Click the Partners edit tool (pencil icon) to edit a partner.



## Related Links

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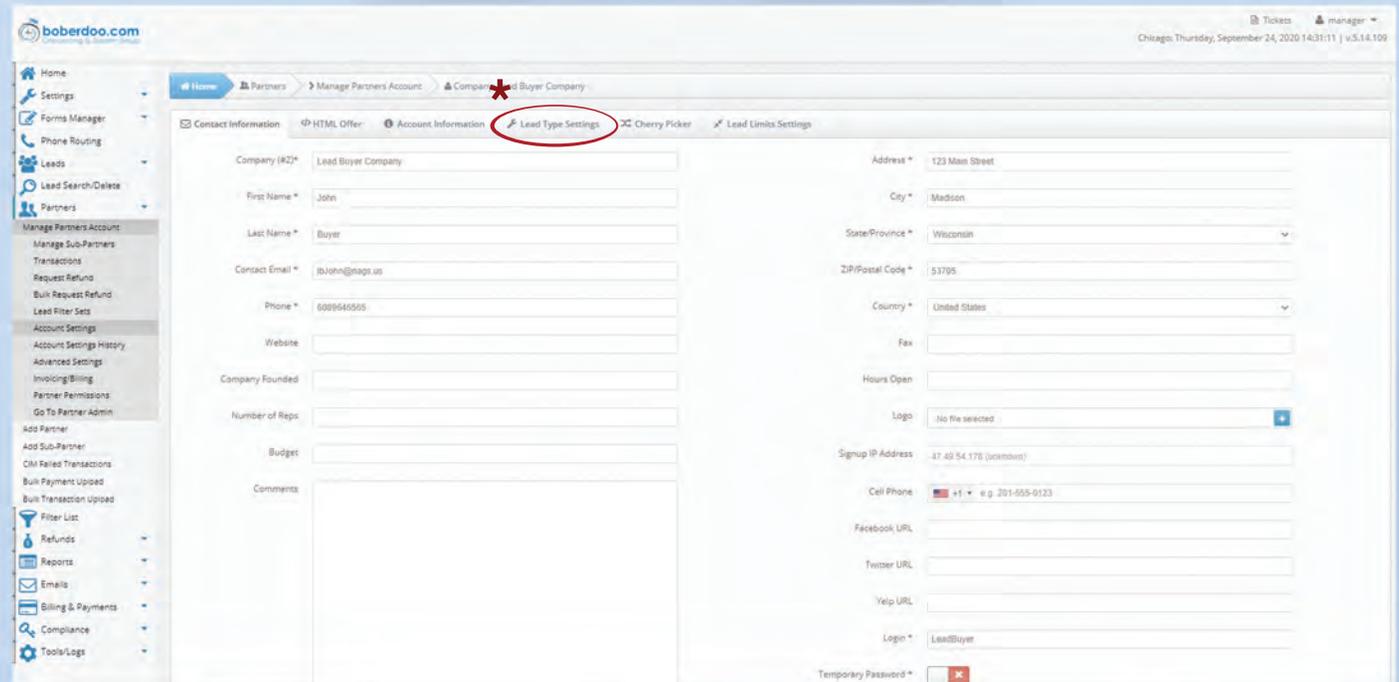
## Editing a Partner

Partners are the same as your lead buyers. Create partners in your system to sell leads to.

The Partner edit mode shows you the Account Settings for that partner.

Every partner's account is managed here, such as contact information, logins and passwords.

The tabs across the top provide more options.

*Click "Lead Type Settings" to view duplicate lead settings.



## Related Links

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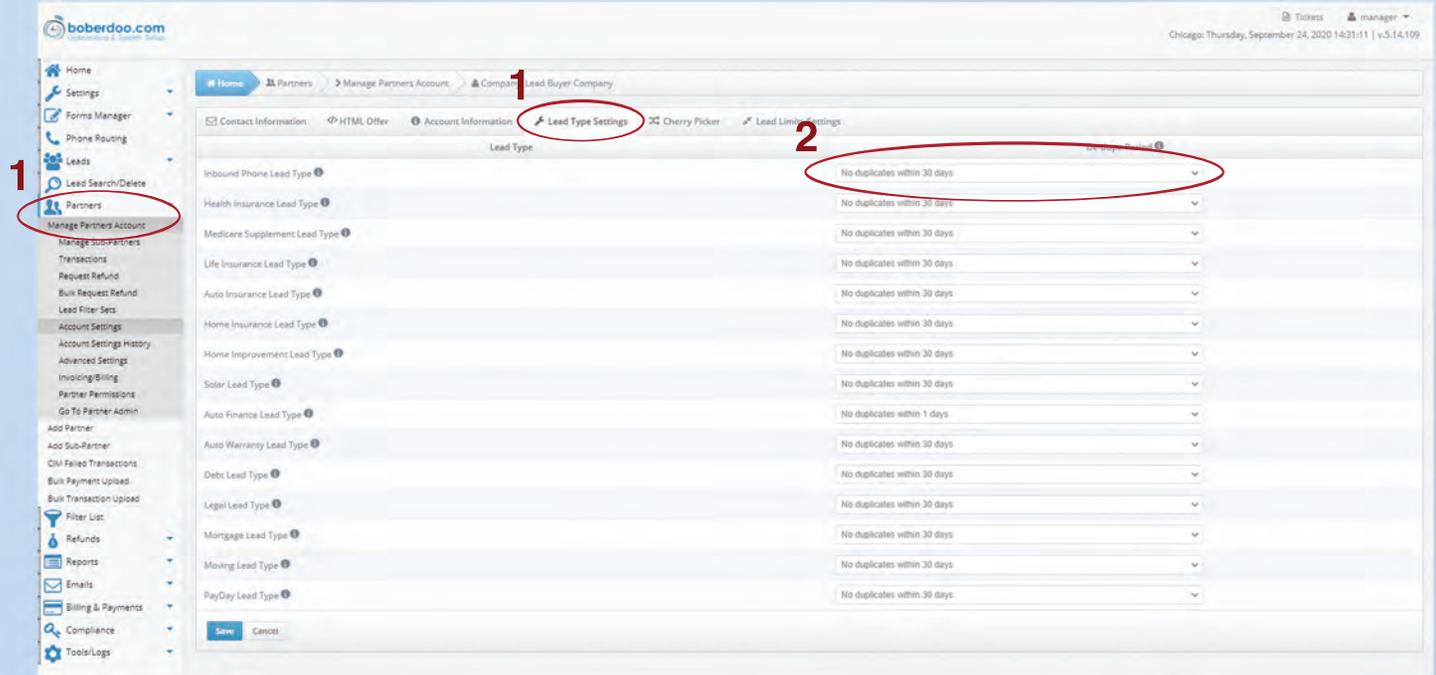
# Duplicate Lead Settings

Partners are the same as your lead buyers. Create partners in your system to sell leads to.

**Step 1**

If you are not there already, you can find the Duplicate Lead Settings in Lead Type Settings tab. To get there, go under the Partners tab, then the Manage Partners Account sub-tab.

This view permits you to manage this partner's duplicate lead settings for each lead type.

Use the "Tips" by hovering your cursor over the circled "i" icons.

**Step 2**

Dedupes can be set ranging from "Accept Duplicates" to preventing duplicates from 30 days up to 119 days.



## Related Links

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# Setting Lead Limits

Partners are the same as your lead buyers. Create partners in your system to sell leads to.

**Step 1**

If you are not already there, Lead Limits can be found under the Partners tab, Manage Partner Settings, then Account Settings. From there the "Lead Limits Settings" tab is at the top of the page.
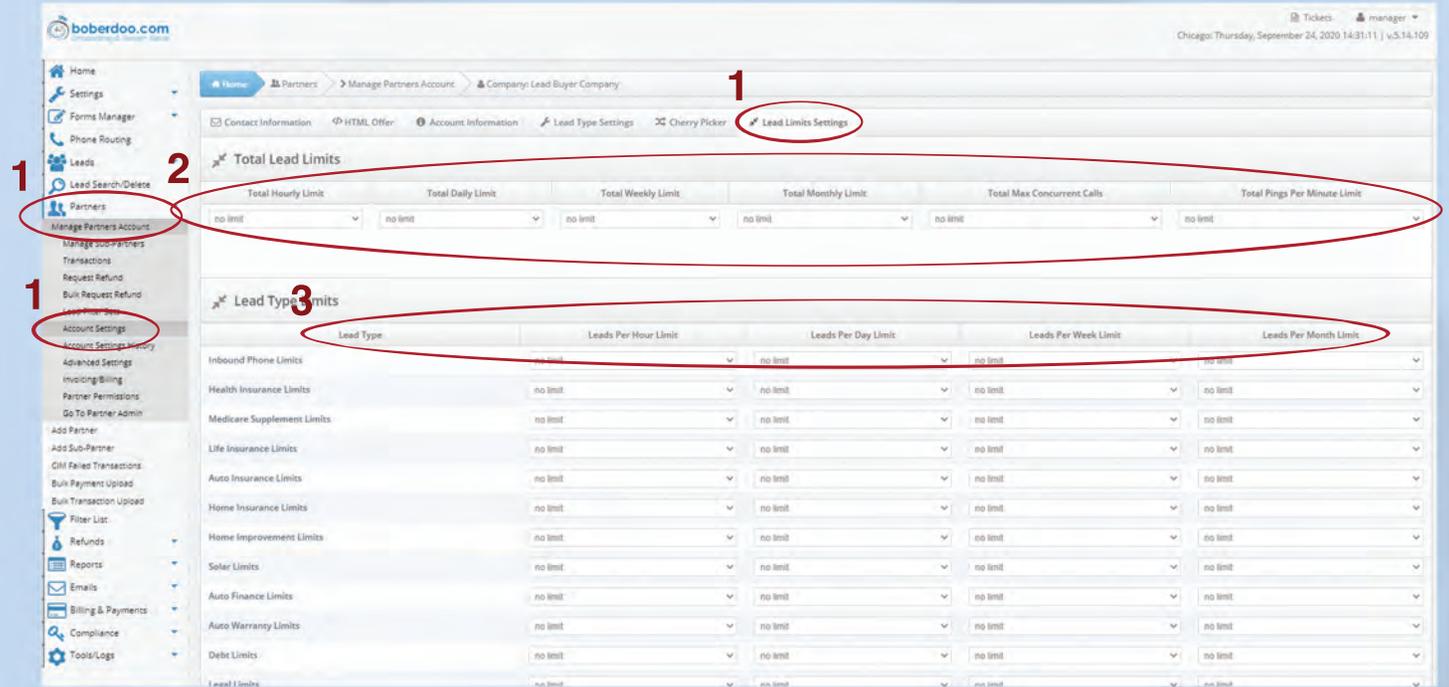
**Step 2**

Caps can be set independently for each lead type.

**Step 3**

Also, caps can be set for a Partner in the following ways:

Leads Per Hour
Leads Per Day
Leads Per Week
Leads Per Month



## Related Links

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# Partner Filter Sets

Active partner filter sets are required for every partner.

Filter sets determine if a lead matches to a partner's accepted lead criteria.
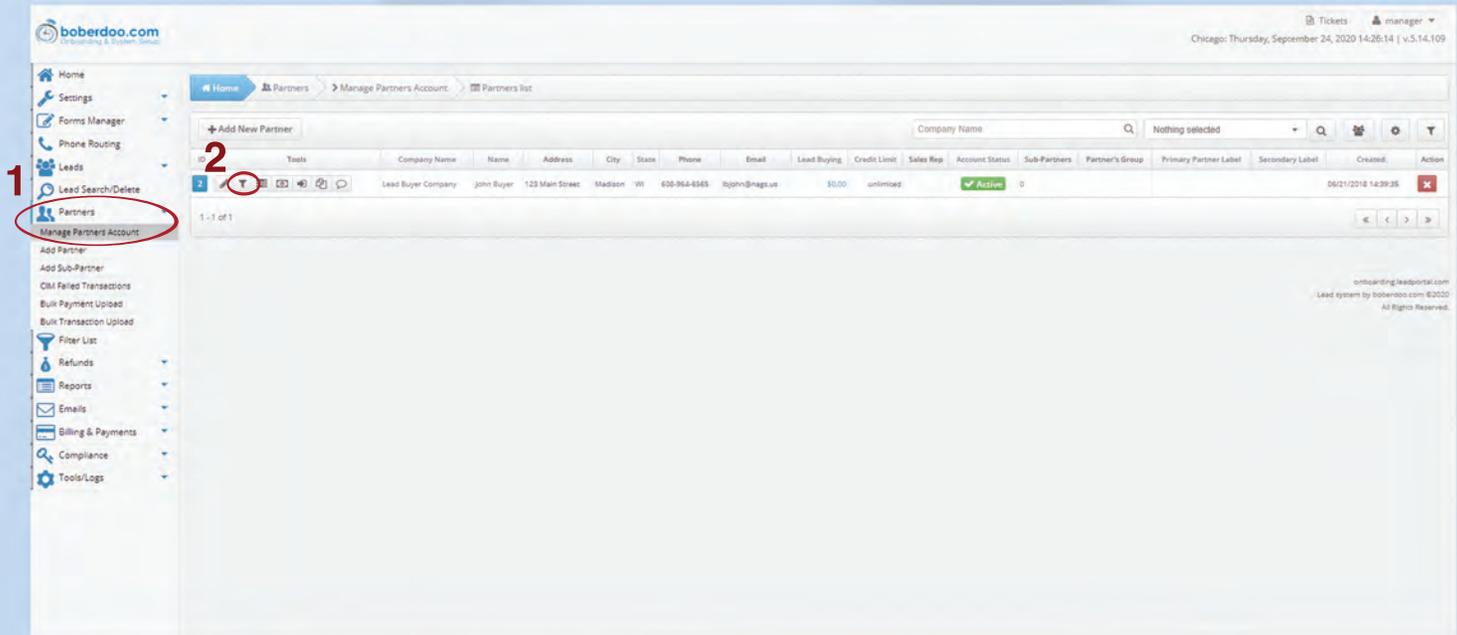
Step 1
To get to the filter set, check under the Partners tab and Manage Partners Account.

Step 2
Click the Filter icon to create and edit Filter Sets for a partner.

👍 Looking to delivery leads via SMS? Find out more.



## Related Links

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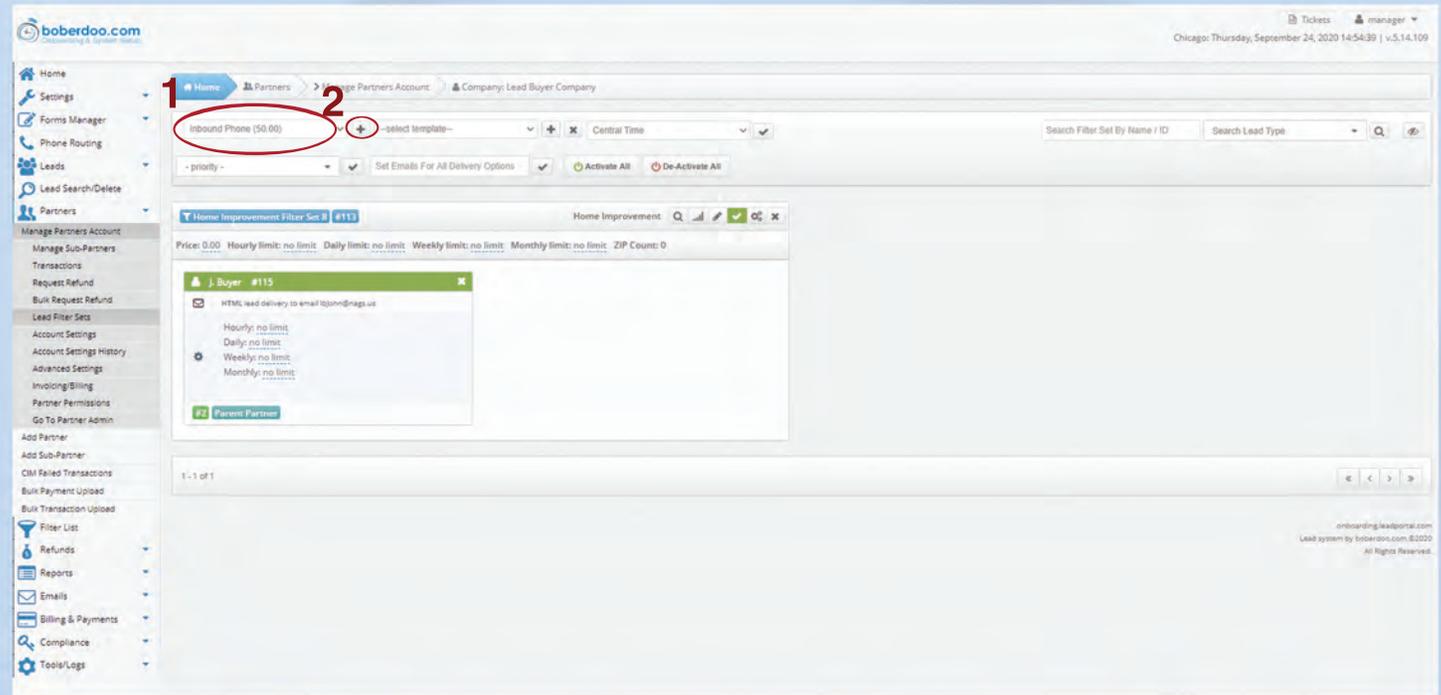
# Partner Filter Sets

Active partner filter sets are required for every partner.

**Step 1**

To create a new filter set, first select the lead type in the drop-down menu to which the filter set will be dedicated.

**Step 2**

Click the "+" button to create and configure the new filter set.

## Related Links

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![boberdoo.com Onboarding & System Setup logo]

# Partner Filter Sets

Active partner filter sets are required for every partner.

**Step 1**

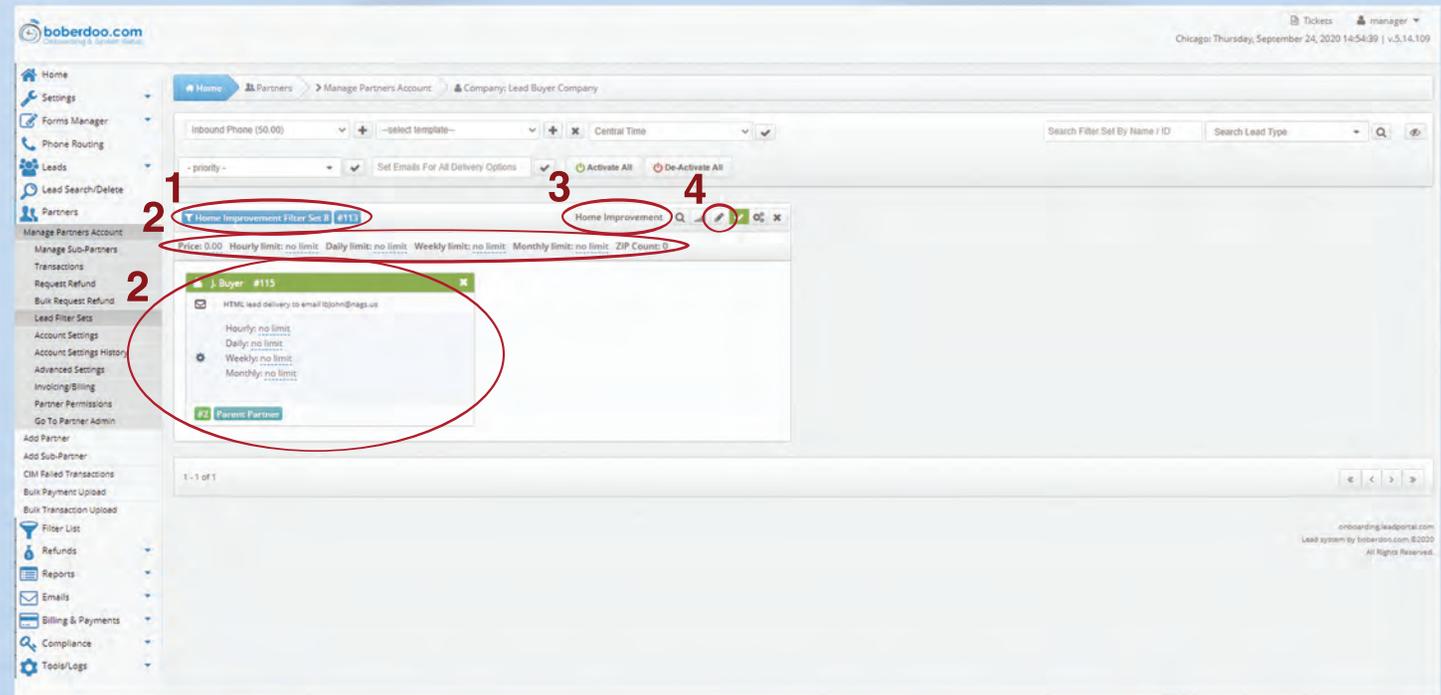Existing filter sets are represented by this section which provides the name and ID number on the top.

**Step 2**

There are some "at-a-glance" details about the filter set.

**Step 3**

The filter's lead type is displayed here (i.e. Home Improvement).

**Step 4**

Click the edit button (pencil icon) to view and modify the filter set.



## Related Links

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# Partner Filter Sets

Editing Partner Filter Sets

**Step 1**

The options available in your filter set are numerous. Scroll down to view all the options.

**Step 2**

Here we highlight some important ones:

**2A**

Name: Consider a naming convention that is brief but descriptive.

**2B**

Accepted Sources: It is critical to double check leads coming from a source are selected in the filter, otherwise leads from that source will be unmatched.

**2C**

Delivery: Here you determine how and to whom the lead will be delivered when sold. Double check email addresses entered here or that the custom delivery is selected, otherwise leads will have posting errors.
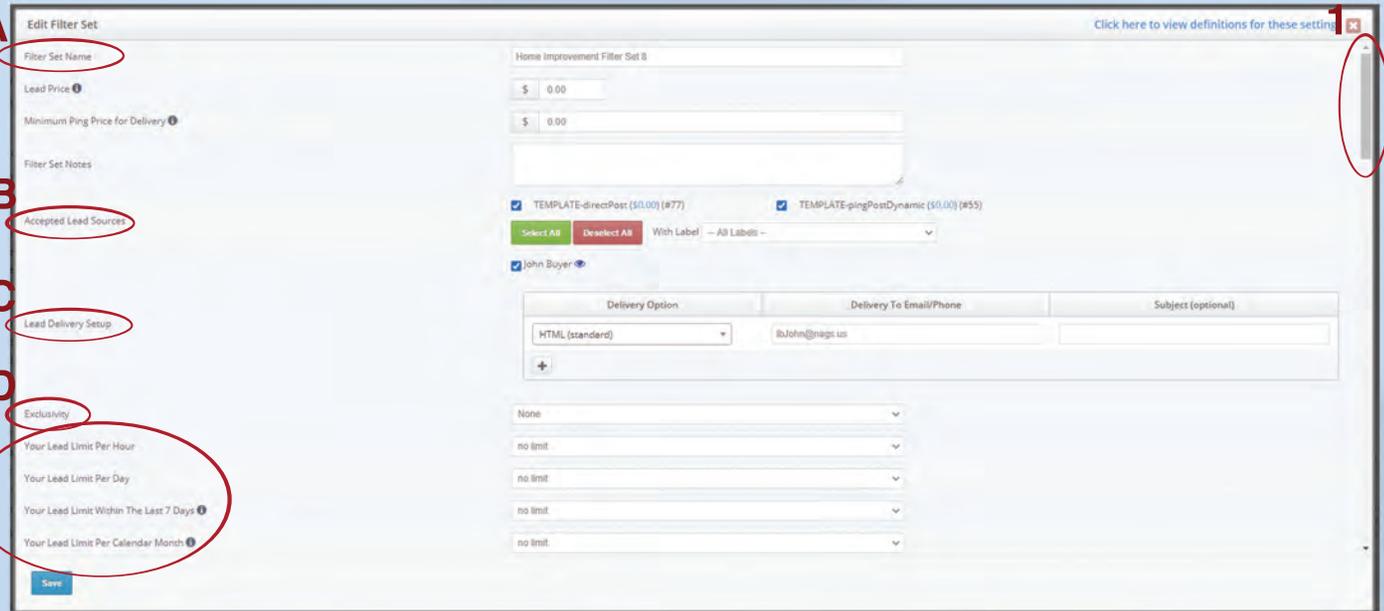


**2D**

Exclusivity Setting: If a partner does not want to share leads, set to "Exclusive."

**2E**

Lead limits can also be set at a partner's filter set level (be sure to check the limits set at the Partner's account settings.)

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