

Creating a New Partner

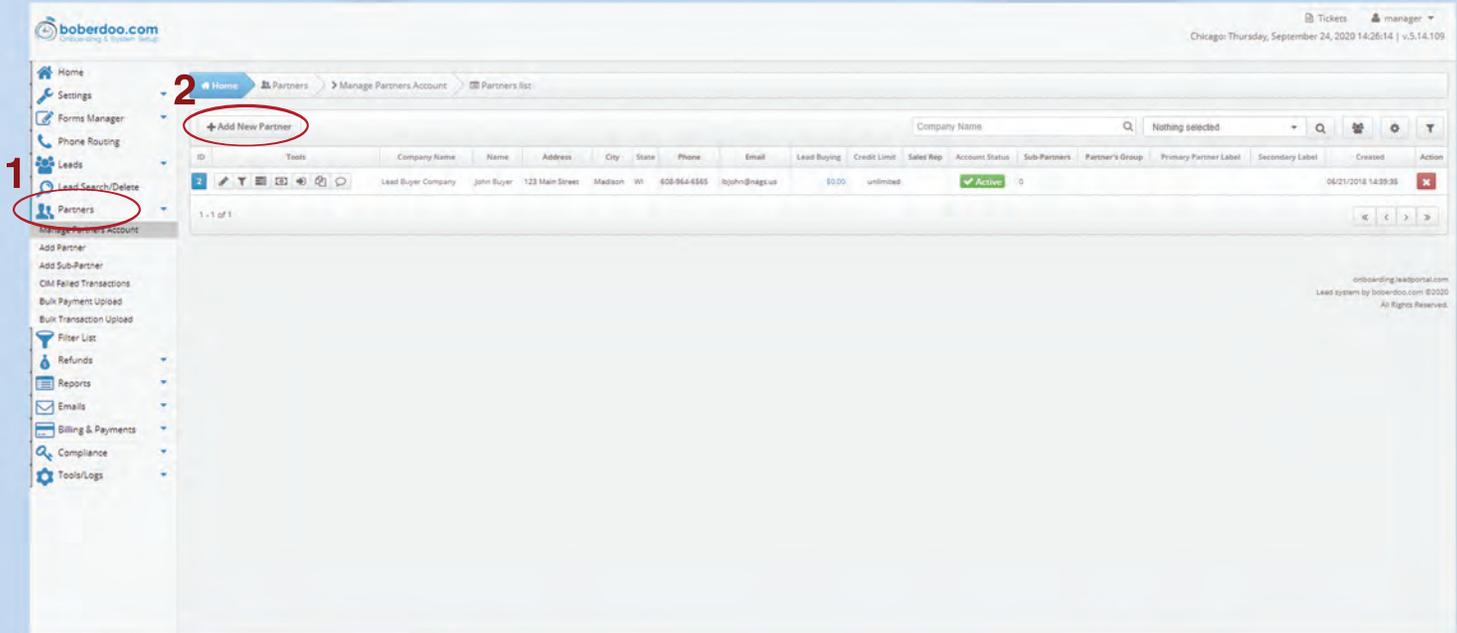
Partners are the same as your lead buyers. Create partners in your system to sell leads.

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.



ID	Company Name	Name	Address	City	State	Phone	Email	Lead Buying	Credit Limit	Sales Rep	Account Status	Sub-Partners	Partner's Group	Primary Partner Label	Secondary Label	Created	Action
2	Lead Buyer Company	John Buyer	123 Main Street	Madison	WI	608-964-6565	john@bngs.us	\$0.00	unlimited		Active	0				06/21/2018 14:39:35	

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Editing a Partner

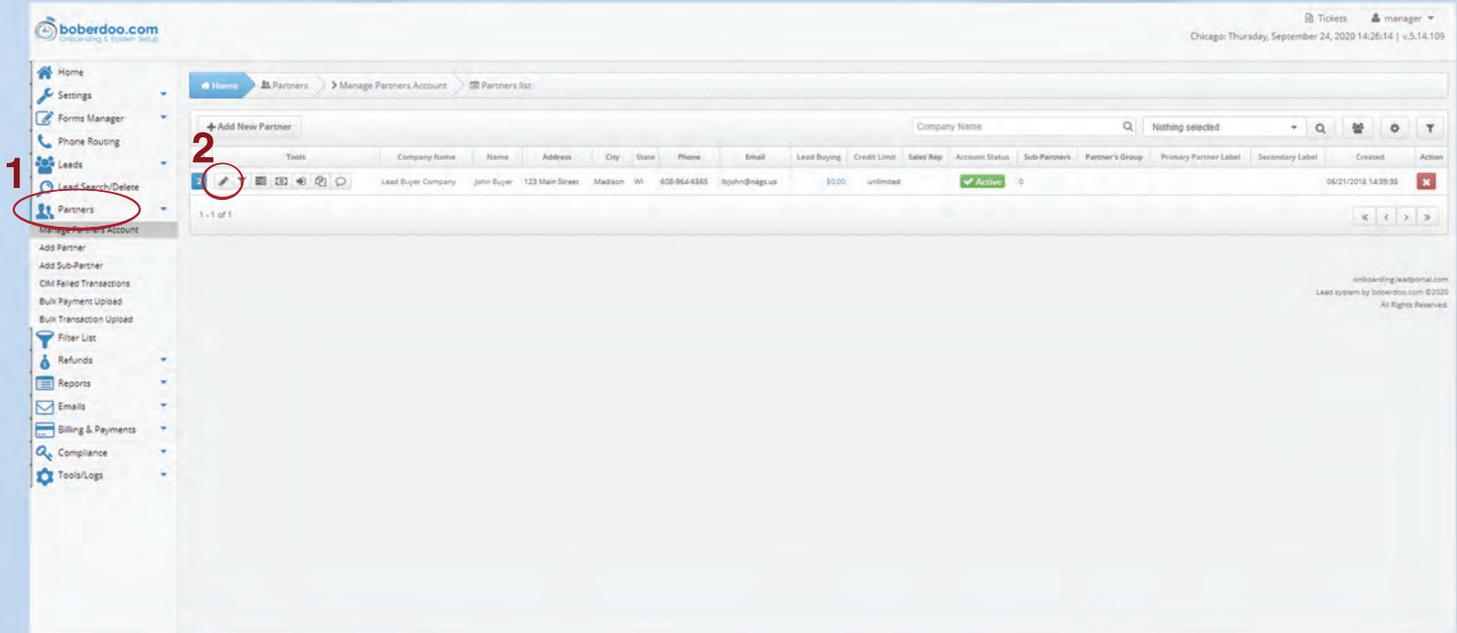
Partners are the same as your lead buyers. Create partners in your system to sell leads.

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.



The screenshot shows the boberdoo.com interface. The left sidebar has a 'Partners' tab highlighted with a red circle and the number '1'. The main content area shows the 'Partners list' with a table of partner information. A red circle with the number '2' highlights the pencil icon in the 'Tools' column of the table, which is used to edit a partner.

Tools	Company Name	Name	Address	City	State	Phone	Email	Lead Buying	Credit Limit	Sales Rep	Account Status	Sub-Partners	Partner's Group	Primary Partner Label	Secondary Label	Created	Action
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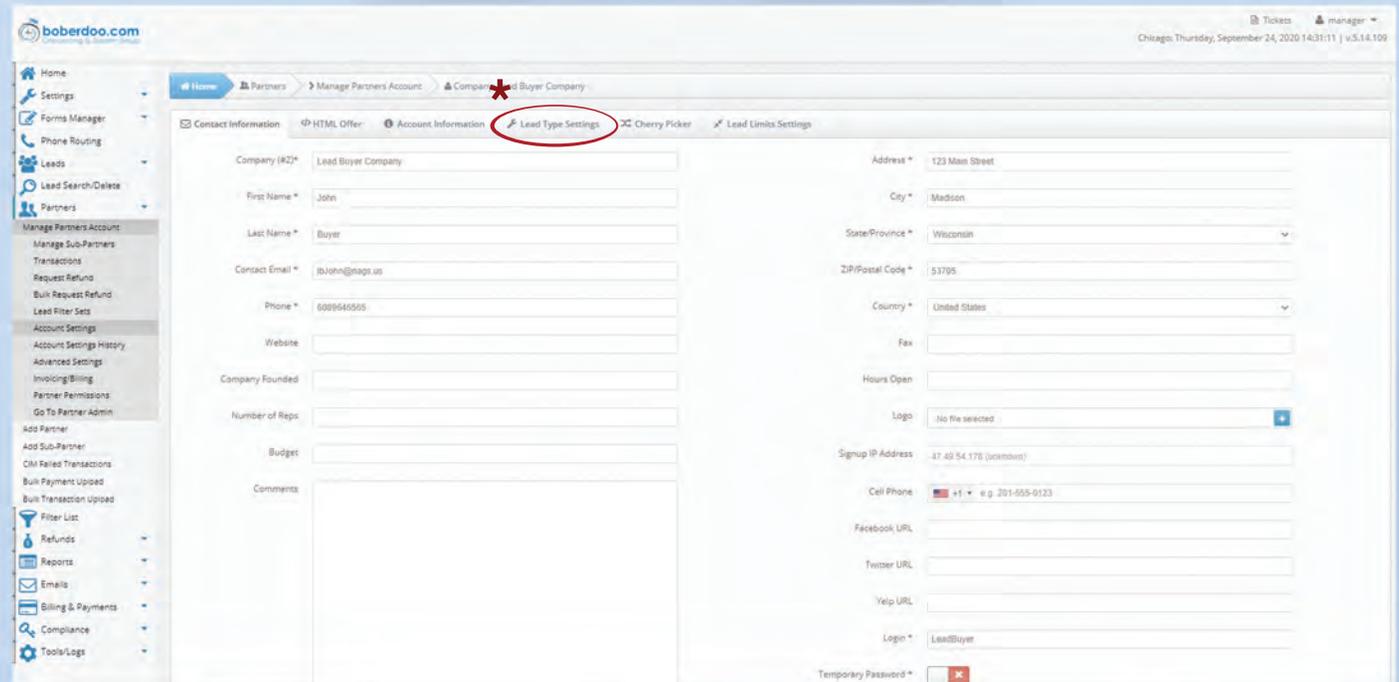
Partners are the same as your lead buyers. Create partners in your system to sell leads to.

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.



The screenshot shows the boberdoo.com interface for editing a partner's account. The breadcrumb trail is: Home > Partners > Manage Partners Account > Company > Buyer Company. The 'Lead Type Settings' tab is highlighted with a red circle. The form contains the following fields:

- Company (RZ)*: Lead Buyer Company
- First Name*: John
- Last Name*: Buyer
- Contact Email*: jjohn@bops.us
- Phone*: 6085645555
- Website: (empty)
- Company Founded: (empty)
- Number of Reps: (empty)
- Budget: (empty)
- Comments: (empty)
- Address*: 123 Main Street
- City*: Madison
- State/Province*: Wisconsin
- ZIP/Postal Code*: 53705
- Country*: United States
- Fax: (empty)
- Hours Open: (empty)
- Logo: No file selected
- Signup IP Address: 47.49.54.178 (unknown)
- Cell Phone: +1 e.g. 201-555-0123
- Facebook URL: (empty)
- Twitter URL: (empty)
- Yelp URL: (empty)
- Login*: LeadBuyer
- Temporary Password*: (empty)

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Duplicate Lead Settings

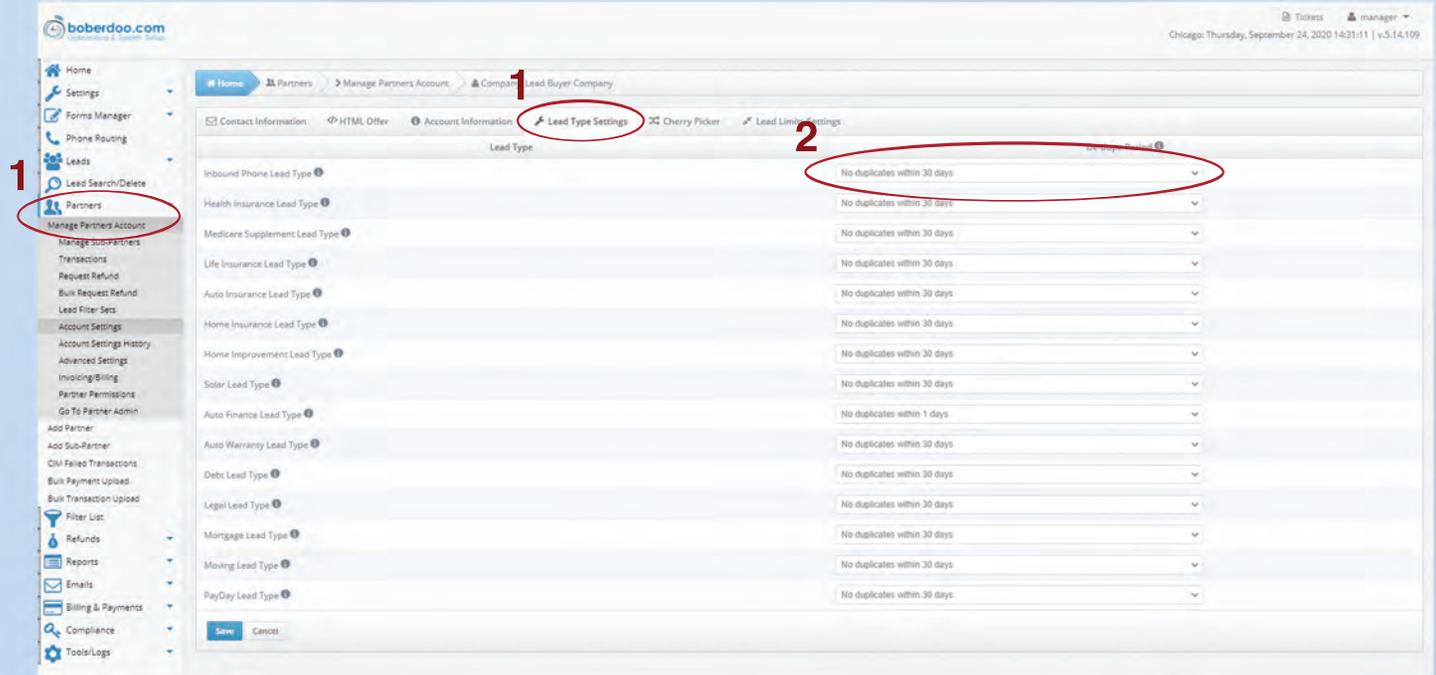
Partners are the same as your lead buyers. Create partners in your system to sell leads to.

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.



The screenshot shows the boberdoo.com interface. The left sidebar has the 'Partners' tab selected, with a red circle around it and a '1' next to it. The main content area shows the 'Manage Partners Account' sub-tab, with the 'Lead Type Settings' tab selected, also circled in red with a '2' next to it. The 'Lead Type Settings' table lists various lead types and their duplicate settings. The 'Inbound Phone Lead Type' row has a dropdown menu set to 'No duplicates within 30 days', which is circled in red with a '2' next to it. The table also includes a 'Save' button at the bottom left.

Step 2

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

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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.

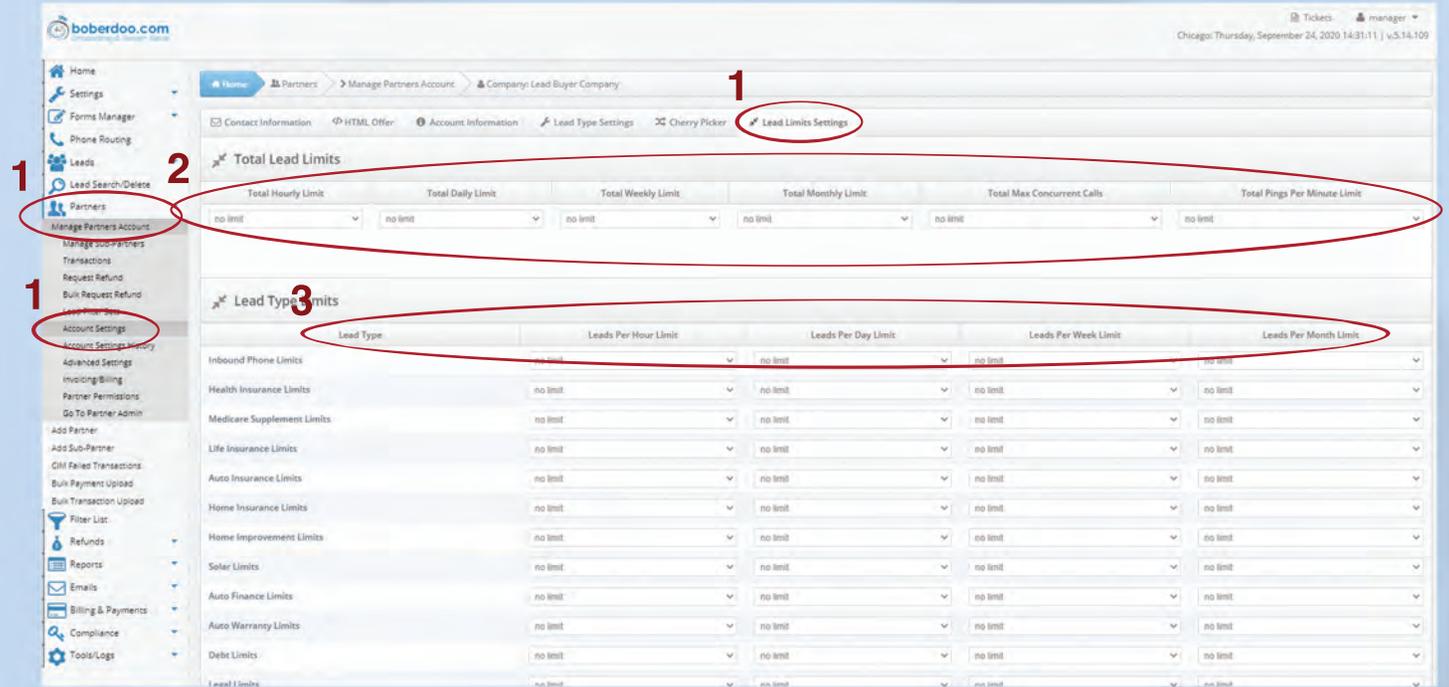
Step 2

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



Total Lead Limits					
Total Hourly Limit	Total Daily Limit	Total Weekly Limit	Total Monthly Limit	Total Max Concurrent Calls	Total Pings Per Minute Limit
no limit	no limit	no limit	no limit	no limit	no limit

Lead Type Limits				
Lead Type	Leads Per Hour Limit	Leads Per Day Limit	Leads Per Week Limit	Leads Per Month Limit
Inbound Phone Limits	no limit	no limit	no limit	no limit
Health Insurance Limits	no limit	no limit	no limit	no limit
Medicare Supplement Limits	no limit	no limit	no limit	no limit
Life Insurance Limits	no limit	no limit	no limit	no limit
Auto Insurance Limits	no limit	no limit	no limit	no limit
Home Insurance Limits	no limit	no limit	no limit	no limit
Home Improvement Limits	no limit	no limit	no limit	no limit
Solar Limits	no limit	no limit	no limit	no limit
Auto Finance Limits	no limit	no limit	no limit	no limit
Auto Warranty Limits	no limit	no limit	no limit	no limit
Debt Limits	no limit	no limit	no limit	no limit
Lead Limits	no limit	no limit	no limit	no limit

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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

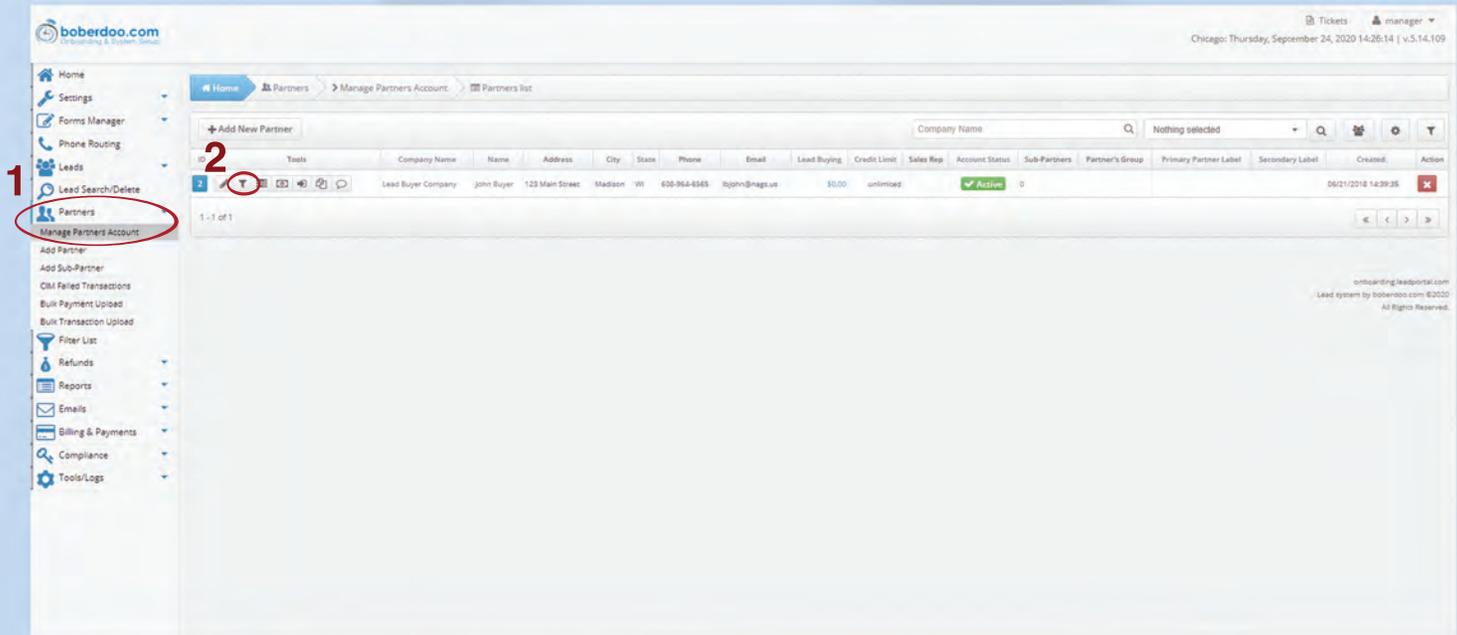
To get to the filter set, check under the Partners tab and Manage Partners Account.

Step 2

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



Looking to delivery leads via SMS? [Find out more.](#)



The screenshot shows the boberdoo.com interface. The top navigation bar includes 'Home', 'Partners', and 'Manage Partners Account'. The left sidebar contains various menu items, with 'Partners' and 'Manage Partners Account' highlighted. The main content area displays a table of partner information. A red circle labeled '1' highlights the 'Filter' icon in the top toolbar, and another red circle labeled '2' highlights the 'Filter' icon in the left sidebar.

Tools	Company Name	Name	Address	City	State	Phone	Email	Lead Buying	Credit Limit	Sales Rep	Account Status	Sub-Partners	Partner's Group	Primary Partner Label	Secondary Label	Created	Action
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Partner Filter Sets

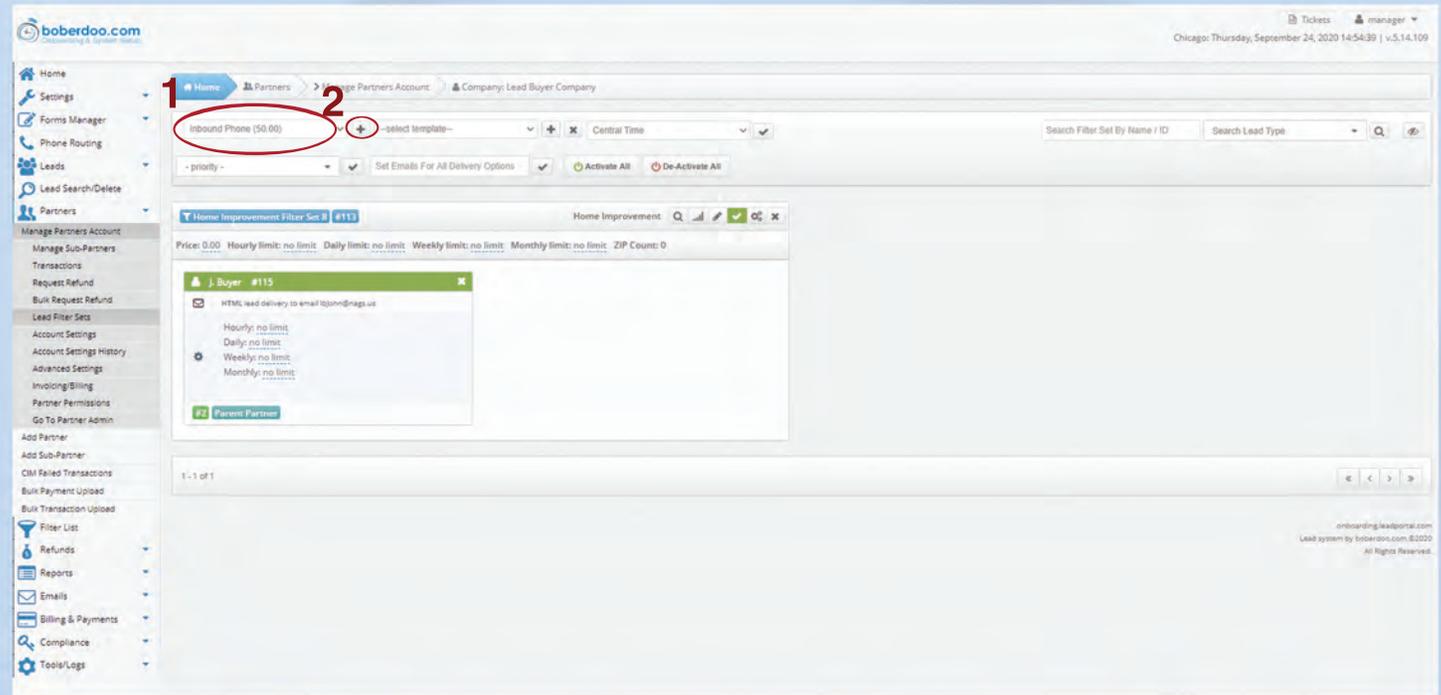
Active partner filter sets are required for every partner.

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.



The screenshot shows the 'boberdoo.com' interface. The top navigation bar includes 'Home', 'Partners', and 'Manage Partners Account'. The main content area displays a list of filter sets, with 'Home Improvement Filter Set #113' selected. A red circle highlights the 'Inbound Phone (50.00)' lead type, and a red arrow points to the '+' button next to it. The interface includes a sidebar with navigation options, a top navigation bar, and a main content area with search and filter options.

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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

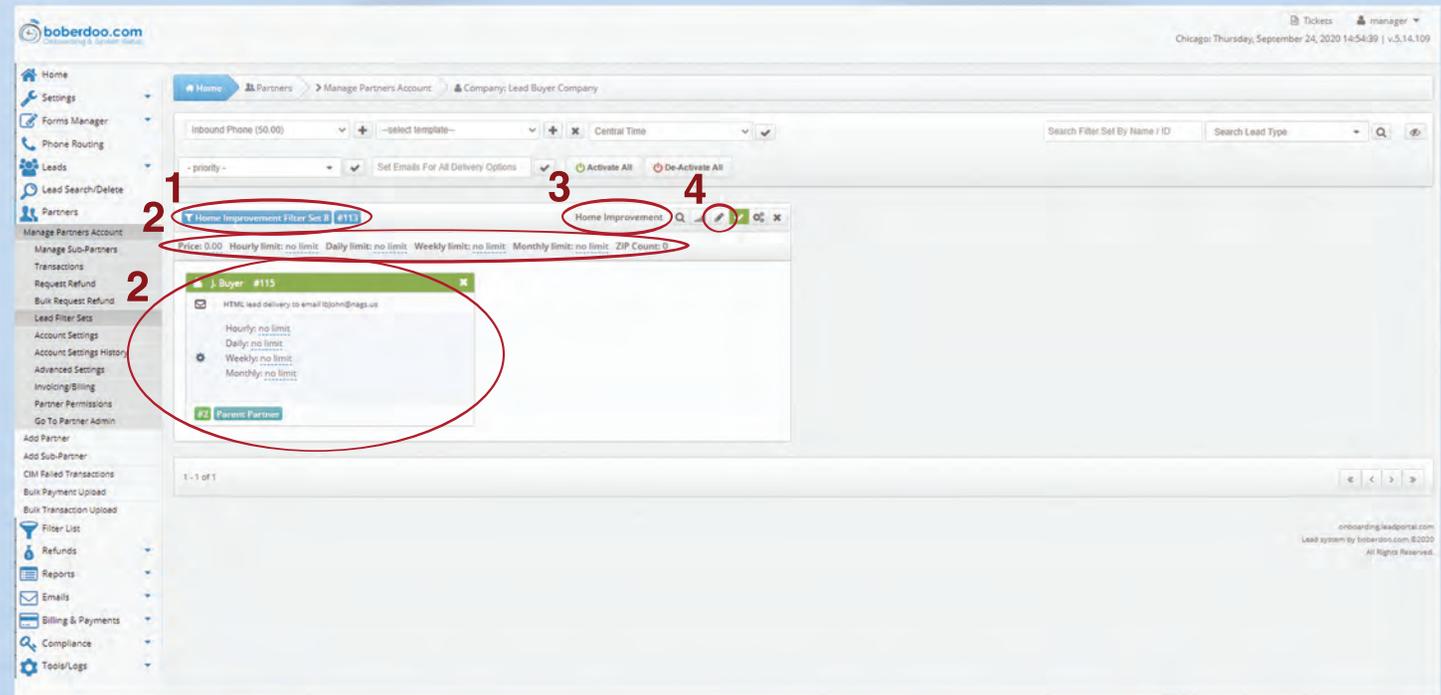
There are some “at-a-glance” details about the filter set.

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.



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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.

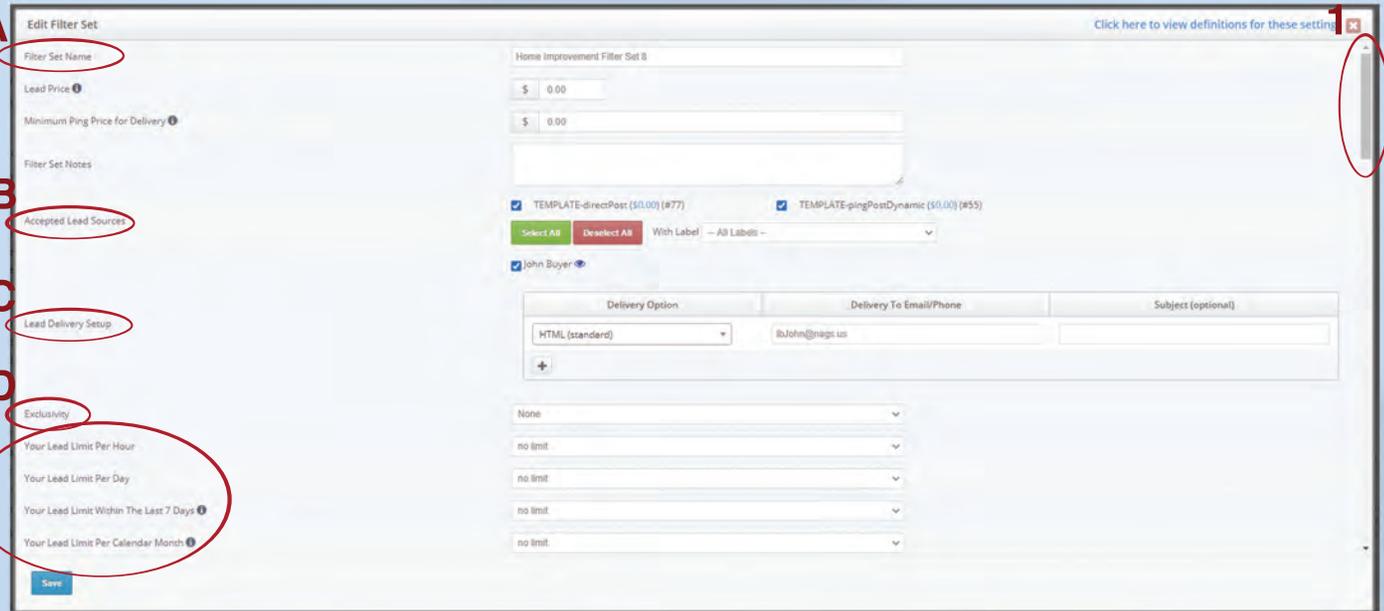
2A

2B

2C

2D

2E



The screenshot shows the 'Edit Filter Set' interface for 'Home Improvement Filter Set B'. Key fields highlighted with red circles include:

- Filter Set Name:** Home Improvement Filter Set B
- Accepted Lead Sources:** Includes checkboxes for 'TEMPLATE-directPost (\$0.00) (#77)' and 'TEMPLATE-pingPostDynamic (\$0.00) (#55)', along with 'Select All', 'Deselect All', and 'With Label' options.
- Lead Delivery Setup:** Includes 'Delivery Option' (HTML (standard)), 'Delivery To Email/Phone' (ibJohn@nags.us), and 'Subject (optional)'.
- Exclusivity:** A dropdown menu set to 'None'.
- Lead Limits:** Four dropdown menus for 'Your Lead Limit Per Hour', 'Your Lead Limit Per Day', 'Your Lead Limit Within The Last 7 Days', and 'Your Lead Limit Per Calendar Month', all set to 'no limit'.

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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