



Intro to Sources

Sources allow you to see where your lead came from and what action the system takes depending on which source the lead came from.

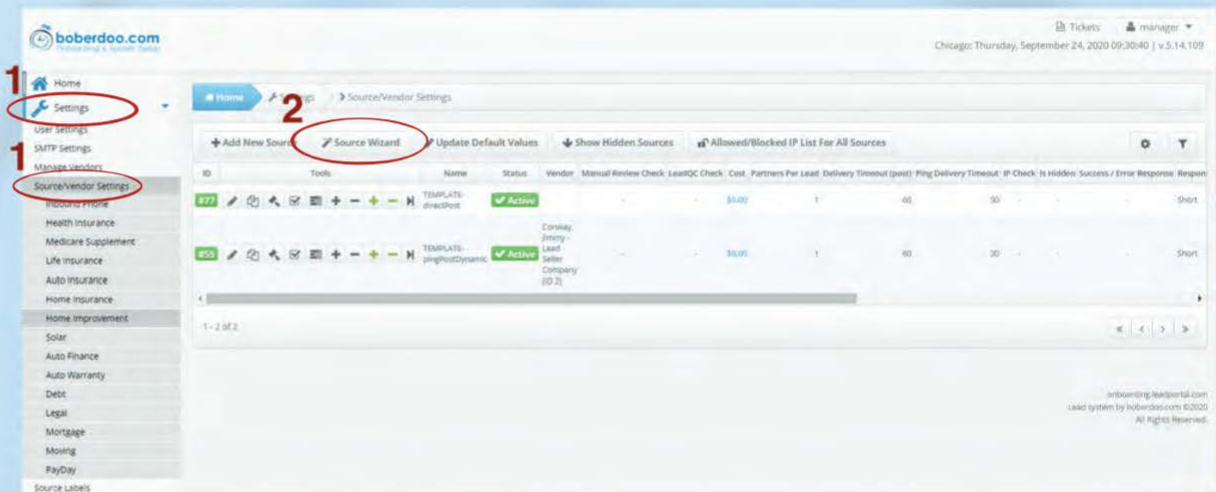
Step 1

Under Settings, select Source/Vendor Settings to start.

Step 2

Click Source Wizard and follow the instructions to add a new source.

You can associate one vendor with multiple source, but only one sources can be associated with one vendor.



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Intro To Sources

Sources allow you to see where your lead came from, as well as what action the system takes depending on which source the lead came from.

Step 1

Click here for the definitions of each setting.

Step 2

Partners Per Lead - Enter the maximum number of times you want to sell a lead from this source.

Step 3

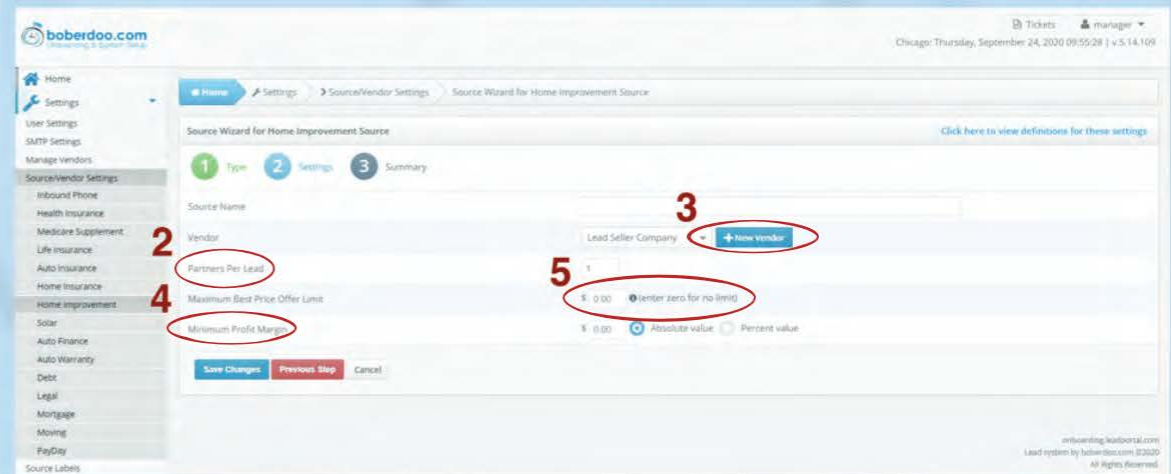
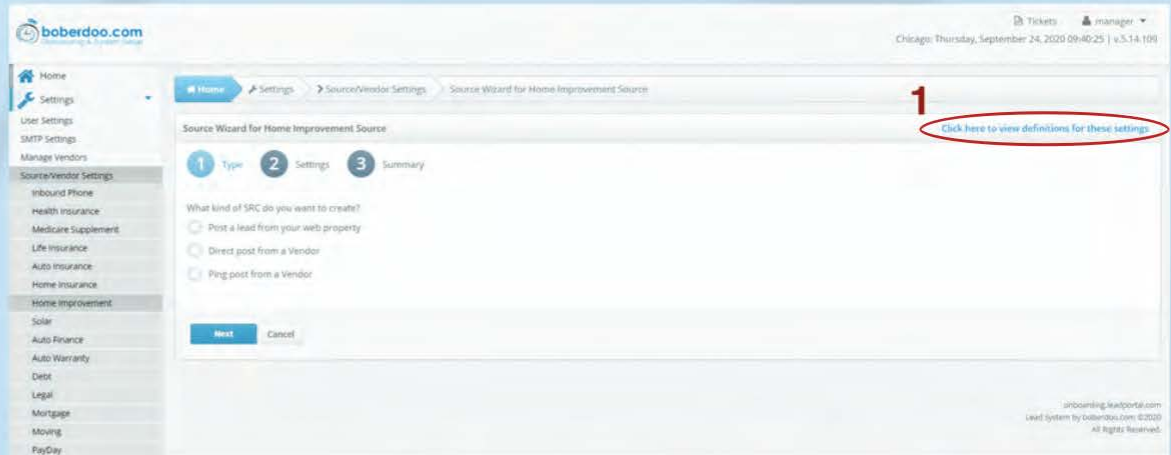
Assign associated Vendor or create a new one to assign right from this page.

Step 4

Enter the Profit Margin you want to take from the lead.

Step 5

Cap your bids back to a lead seller at a specific amount.



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Intro to Vendors

Vendors are your lead sellers. They also could be known as partners.

Step 1

Under settings, select Manage Vendors to start.

Step 2

Click Quick Add Vendor and fill out the fields that pop up to complete creating a vendor.

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Home Settings User Settings SMTP Settings **Manage Vendors** Manage Partners Groups Manage Partners Labels Manage User Groups Manage Users Blocked Accounts Add Funds Settings Custom Deliveries Info Custom Deliveries Wizard Sales Representatives Add Sales Representative API Keys API Specs Tickets Webhooks/Notifications

Home Manage Vendors

+ Add New Vendor + **Quick Add Vendor**

Total vendors: 1 / Hidden vendors: 0

ID	Company Name	Name	Address	City	State/Province	Country	ZIP/Postal Code	Primary Phone	Email	Status	Created	Action
2	Lead Seller Company	Jimmy Conway	555 North Ave	Chicago	IL	United States	60654	3129327304	jimmy@naps.us	Active	2018-01-26 15:01:02	Hide

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