

MANAGING YOUR LEADS IN INTEGRITY LEADCENTER (1/3)



LeadCENTER

Order Leads

Realtime Campaigns

Manage Leads

Vouchers

FAQ

Search by First Name, Last Name or Lead ID

Import Create Lead

Date Generated: Last 7 days

Name	Lead Status	Location (County, State)	Lead Owner	Lead Type	Received Date
Martha Gongloff	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Laura Corl	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Wayne Heverly	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Dorothy Foster	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Kermit Spotts	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023

Step 1: On the left side, click "Manage Leads". All purchased leads will appear.

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Search by First Name, Last Name or Lead ID

Import Create Lead

Date Generated: Last 7 days

Select All

Martha Gongloff

Laura Corl

Wayne Heverly

Dorothy Foster

Location Centre, PA

Lead Owner TESTER AGENT

Lead Type Aged Final Expense Mailers

Phone

Received Data 6/25/2023

Lead Score

Third Call

Step 2: There are different filters you can select to view your leads.

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Search by First Name, Last Name or Lead ID

Import Create Lead

Date Generated: Last 7 days

Name	Lead Status	Location (County, State)	Lead Owner	Lead Type	Received Date
Martha Gongloff	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Laura Corl	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Wayne Heverly	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Dorothy Foster	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Kermit Spotts	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023

Step 3: Click the drop down to change the status of the lead.

MANAGING YOUR LEADS IN INTEGRITY LEADCENTER (2/3)



LeadCenter Manage Leads interface showing a list of leads. A red arrow points to the 'Disposition' dropdown menu for the lead 'Martha Gongloff'. The dropdown menu is open, showing options: New, First Call, Second Call, Third Call, Voicemail, Text, and Door Knock.

Name	Lead Status	Location (County, State)	Lead Owner	Lead Type	Received Date
Martha Gongloff	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Laura Cori	New	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Wayne Heverly	First Call	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Dorothy Foster	Second Call	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023
Kermit Spotts	Third Call	Centre, PA	TESTER AGENT	Aged Final Expense Mailers	6/25/2023

Step 4: We encourage you to do a disposition on all of your leads!

LeadCenter Lead Details page for Martha Gongloff. A red arrow points to the 'Template' button in the 'CERTIFICATION' section.

Martha Gongloff
LEAD OWNER TESTER AGENT LEAD CATEGORY Direct Mail

CERTIFICATION Template

Lead Details

Status	Received Date	Lead Type	Lead ID
Third Call	06/25/2023	Aged Final Expense Mailers	10131339

Client Details

First Name*	Last Name*	Business Name	Gender
Martha	Gongloff	Premier Marketing, LLC.	-

Step 5: To view a lead, click "Template".

NEW 2015 BENEFIT UPDATE FOR PENNSYLVANIA CITIZENS ONLY

Dear Ms Martha Gongloff,

This is a personal announcement to all PENNSYLVANIA citizens aged 50 and older. You may apply for a NEW state-regulated life insurance program to pay Final Expenses for just pennies a day, regardless of your medical condition, even if you've been turned down before. Return this card today and you will receive the latest information on how this Special Program will pay 100% of all funeral expenses not paid by government funds, up to \$25,000.00 (TAX FREE), for each PENNSYLVANIA citizen covered. To receive this complete NO-COST information on this newly approved plan DESIGNED FOR PENNSYLVANIA CITIZENS, return this card in the provided postage-paid envelope.

233*286*****ECRWSH**R 003
Ms Martha Gongloff
556 W Dowdy Hole Rd
Howard, PA 16841-4635
PA420271785 40848

Name: Martha L. Gongloff
Street Address: 556 W. Dowdy Hole Rd.
Date of Birth: 02 1 07 1 34
Phone (814) 355-5453
Spouse's Name: Joseph J. Gongloff Sr.
Date of Birth: 3 1 16 1 31
County: Centre

IMPORTANT- PENNSYLVANIA CITIZENS MAY ALSO RECEIVE A NO-COST MEMORIAL GUIDEBOOK BY RETURNING THIS CARD

Step 6: You are able to view or print the lead.

MANAGING YOUR LEADS IN INTEGRITY LEADCENTER (3/3)



LeadCenter
Manage Leads / Edit Lead
Martha Gongloff
LEAD OWNER TESTER AGENT LEAD CATEGORY Direct Mail
CERTIFICATION Template
Lead Details
Status: Sold (selected)
Policy Number*: Please enter your lead's policy number.
Carrier*: Please enter your lead's carrier.
Received Date: 06/25/2023
Lead ID: 10131339
Last Modified: 06/25/2023
Premium Sold: [input field]
Client Details

Step 7: If you submit a policy on the lead, you will need to change the lead status to "SOLD". This is very important to make sure the lead doesn't get resold.

LeadCenter
Manage Leads / Edit Lead
Martha Gongloff
LEAD OWNER TESTER AGENT LEAD CATEGORY Direct Mail
CERTIFICATION Template
Lead Details
Status: Sold
Policy Number*: Please enter your lead's policy number.
Carrier*: Please enter your lead's carrier.
Received Date: 06/25/2023
Lead Type: Aged Final Expense Mailers
Lead ID: 10131339
Last Modified: 06/25/2023
Premium Sold: [input field]
Vendor Notes: [input field]
Client Details

Step 8: You will need to submit the policy number and carrier. The policy and carrier must be recorded for the lead to not be resold.

LeadCenter
Manage Leads / Edit Lead
Martha Gongloff
LEAD OWNER TESTER AGENT LEAD CATEGORY Direct Mail
CERTIFICATION Template
Lead Details
Status: Sold
Policy Number*: Please enter your lead's policy number.
Carrier*: Please enter your lead's carrier.
Received Date: 06/25/2023
Lead Type: Aged Final Expense Mailers
Lead ID: 10131339
Last Modified: 06/25/2023
Premium Sold: [input field]
Vendor Notes: [input field]
Client Details
Cancel Save

Step 9: Once all information is entered, click "Save".