

LMS Help Content

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Introduction

Welcome to Impact Legacy Group's Lead Management System (LMS)

The LMS makes it easier for you to work and convert your leads. This web-based software allows you to access your leads across devices — anywhere, anytime.

The LMS will help you:

- Focus on selling
- Get organized
- Save time and effort
- Close deals faster
- Increase sales

The LMS is designed to be simple and intuitive. Within minutes of signing on you will be able to start working your leads and building your pipeline.

The LMS enables you to:

- Search and sort leads
- View the lead details and the original lead card
- Set and update lead statuses to keep track of your sales progress
- Save notes within the lead details
- Print lead images
- Export lead data to an Excel spreadsheet

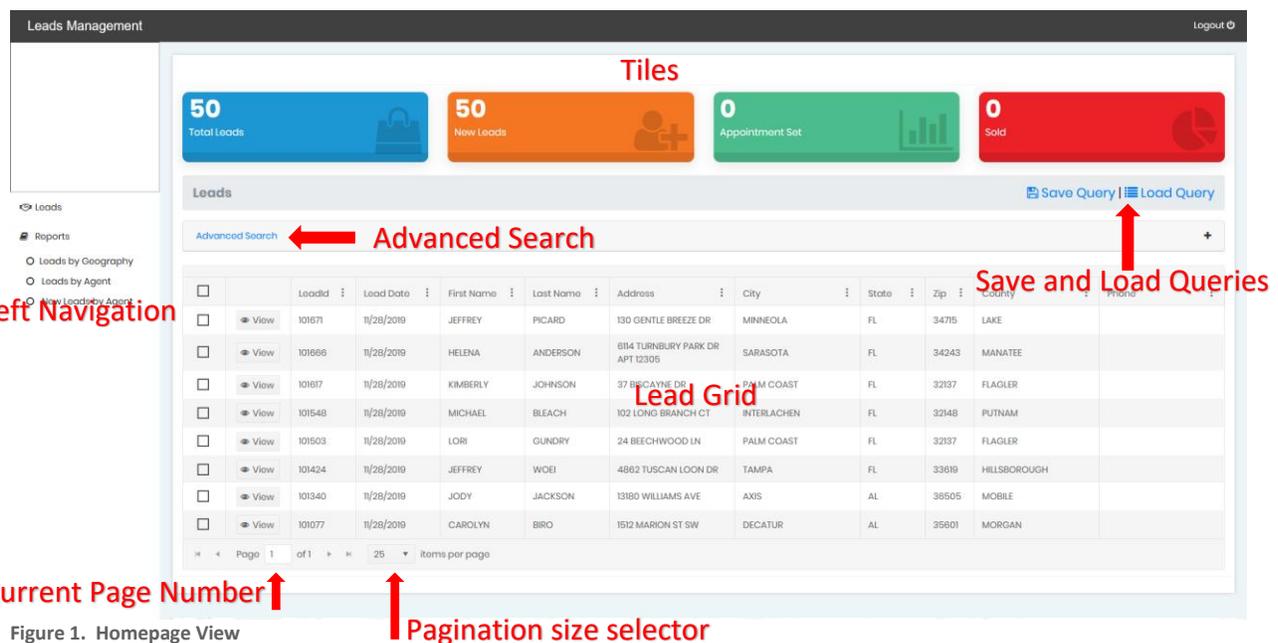
Quick Start Guide

1. Logging in for the First Time

Your LMS administrator will set you up in the system when you first order leads. Once completed, you will receive an email from LMS SYSTEM with a link to finish your account setup. Clicking on this link will validate your email and ask you to change your password (the system creates a secure temporary password when a new account is created). The link expires in 24 hours, so you need to respond quickly. This email may end up in your junk/spam filter, so remember to check there. Once you have completed setting up your account, you will be able to log in and access your leads anytime at <https://impact.mylms.com> using your email and password.

1. Click on the link in the email to complete activation.
2. Your email will prepopulate in the form with the email used by your LMS administrator to setup your account. If you need to change or update this email for any reason, you will need to contact your LMS administrator.
3. You will be asked to enter and confirm a new password. Password requirements are listed below the confirm password field. All password requirements must be met. As each requirement is met, the text will turn green and the item will receive a check mark.
4. Once all requirements are met, click submit to finish activation.
5. You will see a confirmation message and a button to take you back to the login screen where you can now access your leads anytime using the email and password for your account.

2. Get to Know the Homepage



Leads Management Logout

Tiles

- 50 Total Leads
- 50 New Leads
- 0 Appointment Set
- 0 Sold

Leads Save Query | Load Query

Advanced Search +

Lead Grid

	Leadid	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
<input type="checkbox"/>	View	101671	1/28/2019	JEFFREY	PICARD	130 GENTLE BREEZE DR	MINNEOLA	FL	34715	LAKE
<input type="checkbox"/>	View	101666	1/28/2019	HELENA	ANDERSON	814 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE
<input type="checkbox"/>	View	101817	1/28/2019	KIMBERLY	JOHNSON	37 BECCAYNE DR	PALM COAST	FL	32137	FLAGLER
<input type="checkbox"/>	View	101548	1/28/2019	MICHAEL	BLEACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM
<input type="checkbox"/>	View	101503	1/28/2019	LORI	GUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER
<input type="checkbox"/>	View	101424	1/28/2019	JEFFREY	WDOI	4862 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH
<input type="checkbox"/>	View	101340	1/28/2019	JODY	JACKSON	13180 WILLIAMS AVE	AXIS	AL	36505	MOBILE
<input type="checkbox"/>	View	101077	1/28/2019	CAROLYN	BIRO	1512 MARION ST SW	DECATUR	AL	35601	MORGAN

Page 1 of 1 25 items per page

Figure 1. Homepage View

a. The Lead Grid

The Lead Grid displays your leads on the homepage of the Lead Management System. You can search to find specific leads you want to see and customize the grid to display the information you find most helpful. The grid shows 25 leads per page but can be updated to show 50 or 100 leads per page as well. The default view of the Lead Grid includes:

- Lead ID
- Lead Date
- First Name
- Last Name
- Address
- City
- State
- Zip
- County
- Phone

You can also reorder the columns of the grid by dragging and dropping the columns to suit your preferences (See Section 11 - Reorder the Columns in the Lead Grid), or sort the data in the Lead Grid columns in ascending or descending order (See Section 12 - Sort the Columns in the Lead Grid). As you make changes to the lead grid, they are automatically saved so that the grid always displays your data the way you want to see it.

b. Tiles

The colorful squares that make up the dashboard at the top of the homepage are called tiles. Currently, the dashboard features tiles for:

- Total Leads
- New Leads
- Appointments Set
- Sold Leads

The tiles will update with new numbers when new leads are added or when you change a lead's status.

c. Left Nav

You can use the sidebar under the logo on the left side of the homepage to navigate the LMS. Clicking on "Leads" will always take you back to the homepage and your Lead Grid.

Under the "Reports" section, there are some basic reports you can run to see the counts of leads by certain criteria. You can choose to see:

- Leads by Geography
- Leads by Agent
- New Leads by Agent

We will offer more reporting functionality as the system evolves. For now, the Advanced Search and Query features offer more report functionality.

d. Advanced Search

When you click on the Advanced Search bar you can search your leads by:

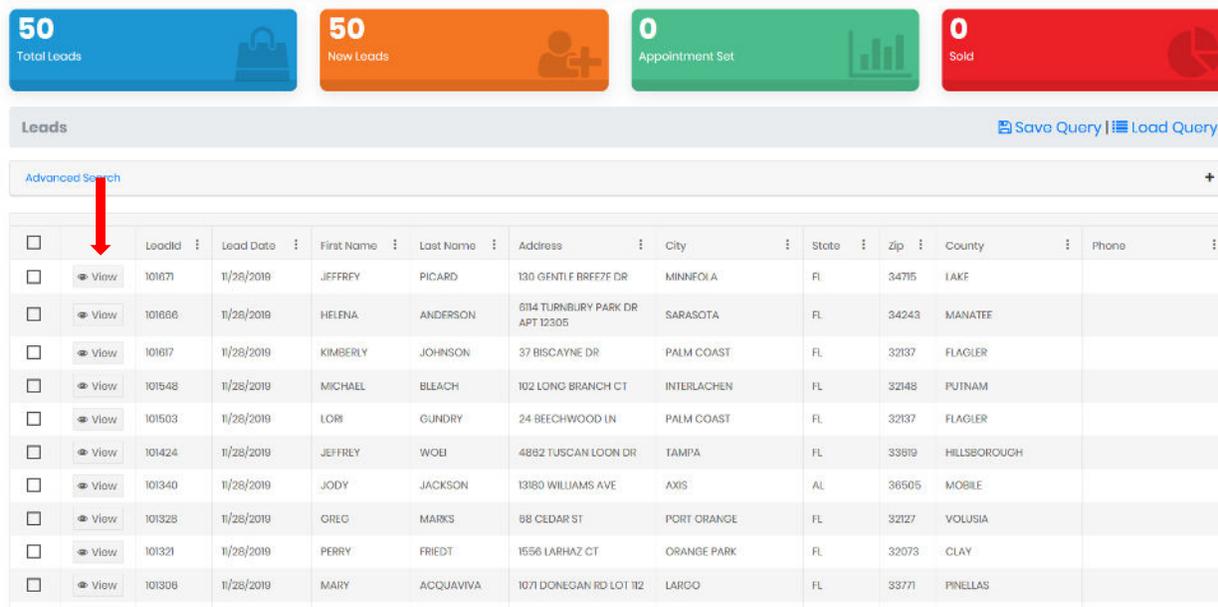
- Lead Details – search for leads by status or by consumer name and address
- Project Details – search for leads within a particular mailing/project code, mail card, etc.
- Geographics – search for leads by state, county, zip code, etc.
- Demographics – search for leads by gender or age (data must have been entered in the database from the lead card by you for this to work)

For searches you will do frequently, you can save and name it as a query so you can easily recall it as a report (See Section 13 - Create and Save Queries Using Advanced Search).

3. View a Lead

The Lead Grid on the homepage is where all your leads will populate. To view any lead, follow these instructions:

1. From the Lead Grid, click on the button labeled “View” (**Figure 2**).



The screenshot shows a dashboard with four summary cards: Total Leads (50), New Leads (50), Appointment Set (0), and Sold (0). Below these is a 'Leads' section with an 'Advanced Search' bar. A table of leads is displayed with columns for LeadId, Lead Date, First Name, Last Name, Address, City, State, Zip, County, and Phone. A red arrow points to the 'View' button in the first row of the table.

	LeadId	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
<input type="checkbox"/>	101671	11/28/2016	JEFFREY	PICARD	130 GENTLE BRIDGE DR	MINNEOLA	FL	34715	LAKE	
<input type="checkbox"/>	101666	11/28/2019	HELENA	ANDERSON	6114 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE	
<input type="checkbox"/>	101617	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	101548	11/28/2019	MICHAEL	BLEACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM	
<input type="checkbox"/>	101503	11/28/2019	LORI	GINDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	101424	11/28/2019	JEFFREY	WOE	4882 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH	
<input type="checkbox"/>	101340	11/28/2019	JODY	JACKSON	1380 WILLIAMS AVE	AXIS	AL	36505	MOBILE	
<input type="checkbox"/>	101328	11/28/2019	GREG	MARKS	88 CEDAR ST	PORT ORANGE	FL	32127	VOLUSIA	
<input type="checkbox"/>	101321	11/28/2019	PERRY	FRIEDT	1556 LARHAZ CT	ORANGE PARK	FL	32073	CLAY	
<input type="checkbox"/>	101308	11/28/2019	MARY	ACQUAVIVA	1071 DONEGAN RD LOT 112	LARGO	FL	33771	PINELLAS	

Figure 2. Selecting a Lead to View

2. You will go to a lead details page which is separated into multiple tabs. The Contact tab is the one you are currently viewing and will be colored distinctly from the other tabs to help you know which tab you are viewing. To see the details for the Project or Logs click on those tabs (**Figure 3a**). The Project tab includes data about the specific mailing or mail project such as a

unique code identifying that particular mailing. The Logs tab tracks the activity history for each lead such as adding/modifying the contact information, updating lead status, etc.

4. View the Lead Card

On the lead details page, you can view a scanned image of the original lead card. This will allow you to see any additional information written on the lead card by the client.

1. From the Lead Grid, click on the button labeled “View”.
2. Make sure you are in the Contact tab. If you are not, click on the Contact tab (**Figure 3a**).
3. Click on the thumbnail image of the card in the upper right corner (**Figure 3b**). The LMS will open a larger image of the card in a new browser tab.

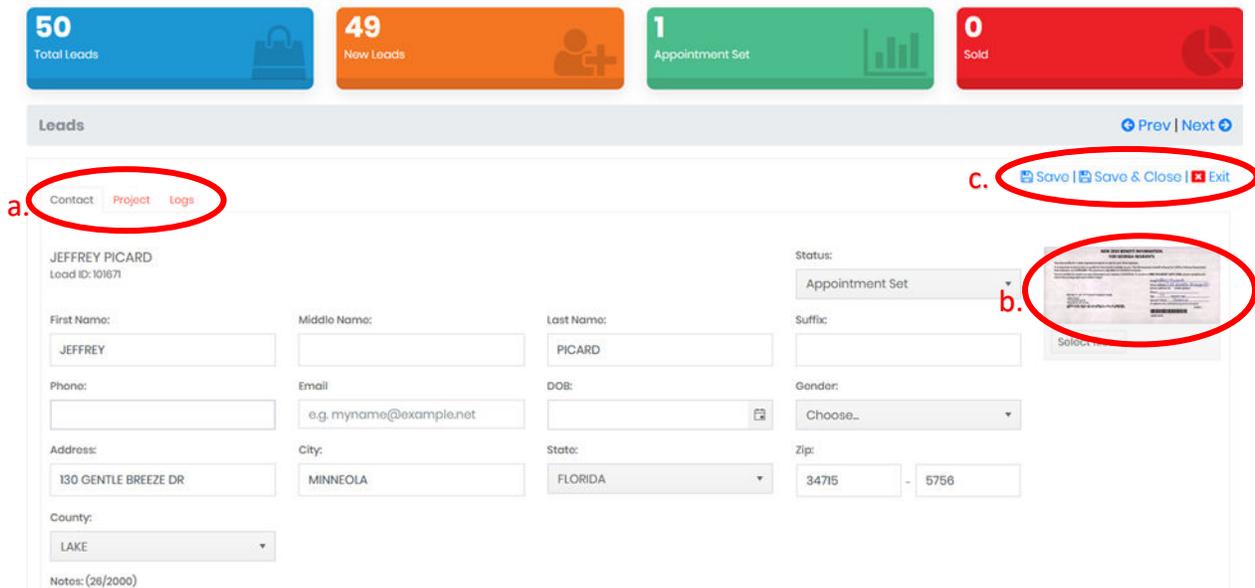


Figure 3. Viewing the Lead Card Image

5. Add or Edit Lead Details

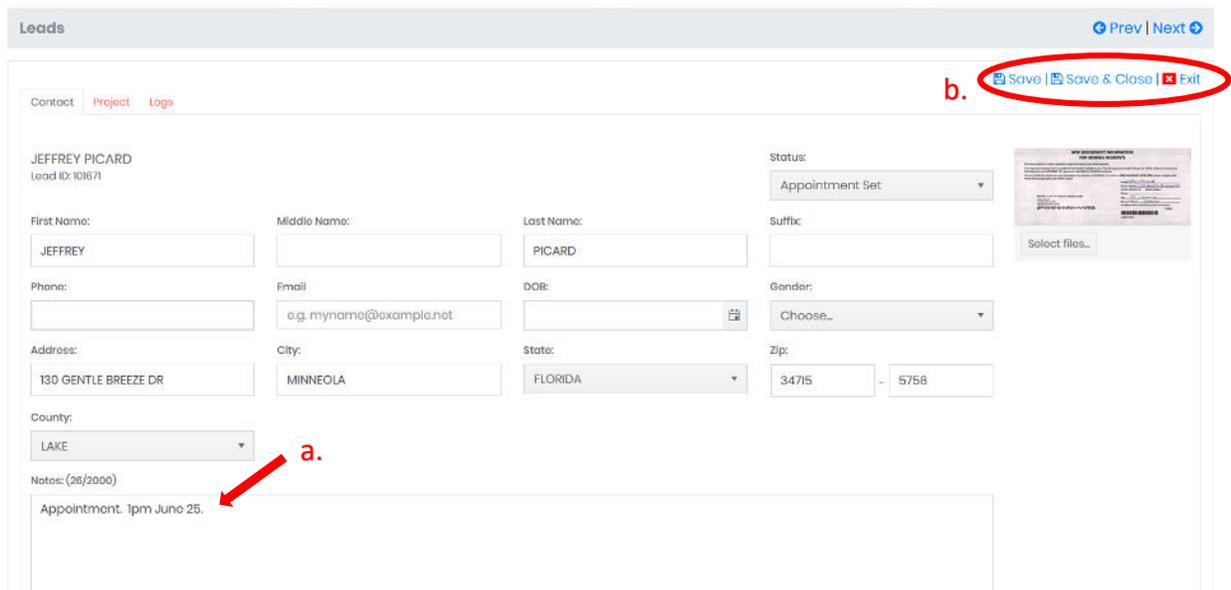
As you begin working your leads, the prospect may share information that you want to add to the system, such as phone number, email address and gender. It is easy to add this information to an existing lead.

1. From the Lead Grid, click on the button labeled “View”.
2. Make sure you are in the Contact tab (If you are not, click on the Contact tab). You can add data to any of the empty fields. You can also edit some of the data in fields that are already filled.
3. Click “Save” in the upper right corner to save your updates/edits and continue working with this lead. Click “Save & Close” if you are finished updating/editing the lead and want to return to the Lead Grid (**Figure 3c**).

6. Add Notes to a Lead

If you have any notes you would like to add to a lead, you can add them to the notes field located on the Contact tab of the Lead Details window. You can use this field to capture notes that help you track workflow or information about the client. Some agents use notes to record first impressions, children’s names, and callback reminders.

1. From the Lead Grid, click on the button labeled “View”.
2. Make sure you are in the Contact tab (If you are not, click on the Contact tab). At the bottom of the tab, you will see a large “Notes” field where you can type your notes (**Figure 4a**).
3. Click “Save” in the upper right corner to save your notes and continue working with this lead. Click “Save & Close” to exit the Lead Details window and return to the Lead Grid. Click “Exit” to exit the lead details and return to the Lead Grid. (**Figure 4b**)



The screenshot shows the 'Leads' interface with the 'Contact' tab selected. The lead name is 'JEFFREY PICARD' with ID '101671'. The form includes fields for First Name (JEFFREY), Middle Name, Last Name (PICARD), Phone, Email (e.g. myname@example.net), DOB, Gender (Choose...), Address (130 GENTLE BREEZE DR), City (MINNEOLA), State (FLORIDA), Zip (34715 - 5756), and County (LAKE). A 'Notes' field at the bottom contains the text 'Appointment. 1pm June 25.' with a red arrow labeled 'a.' pointing to it. In the top right corner, three buttons are circled in red and labeled 'b.': 'Save', 'Save & Close', and 'Exit'.

Figure 4. Adding Notes to a Lead

7. Update the Status of a Lead

When your manager or admin adds leads to the system, the leads are marked as “New.” To help keep your leads organized it is best to always update the leads’ statuses from New as you work them. As you continue to work the leads, you should update their status from “Working” to “Called”, “Appointment Set”, and finally “Sold” so that the leads in the “New” status are truly new. Your pipeline projections are only as good as your data, so it is important to keep this data current!

1. From the Lead Grid, click on the button labeled “View”.
2. In the upper right of the Contact tab, you will see a field labeled “Status.” To update the status of the lead, simply click on the down arrow in this field.
3. Scroll through the list of status options to choose the appropriate one (**Figure 5a**).

- Click “Save” in the upper right corner to save the lead status and continue working with this lead. Click “Save & Close” to exit the Lead Details window and return to the Lead Grid. **(Figure 5b).**

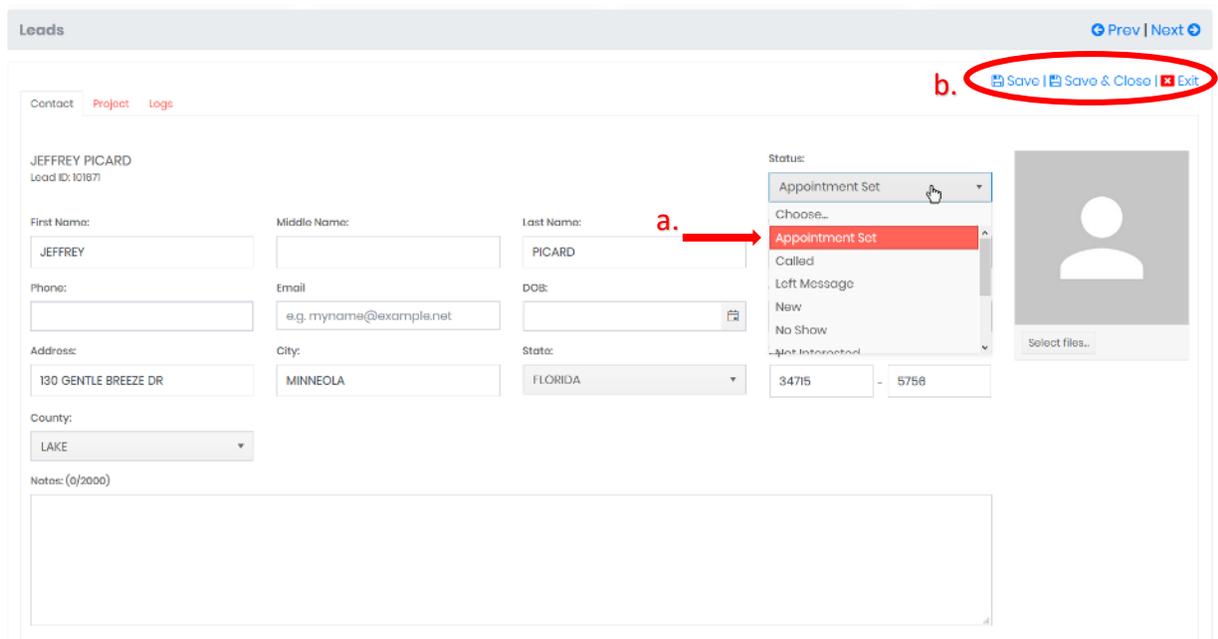


Figure 5. Changing the Status of a Lead

8. View New Leads Using Search

You can use the Advanced Search function to view just your new leads. When leads are uploaded into the system, they are designated as “New” until you change them to another status (See Section 7 – Update the Status of a Lead). If you do not change the statuses of your leads they will always be considered “New”.

- From the Lead Grid, click on “Advanced Search” **(Figure 6).**
- Click on the “Lead Details” **(Figure 7a).**
- Click on the “Status” dropdown menu and select “New” **(Figure 7b).**
- Click on the “Run Search” button at the bottom of the advanced search area **(Figure 7c).**
- The lead grid will update to show you just the leads that match your search criteria **(Figure 8).**

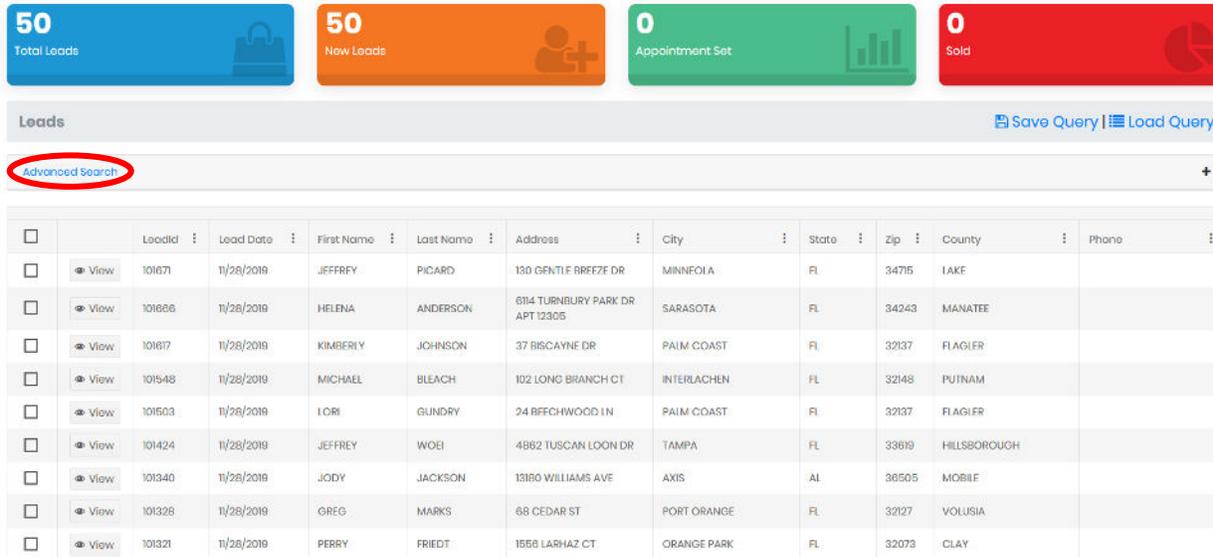


Figure 6. Performing an Advanced Search Query

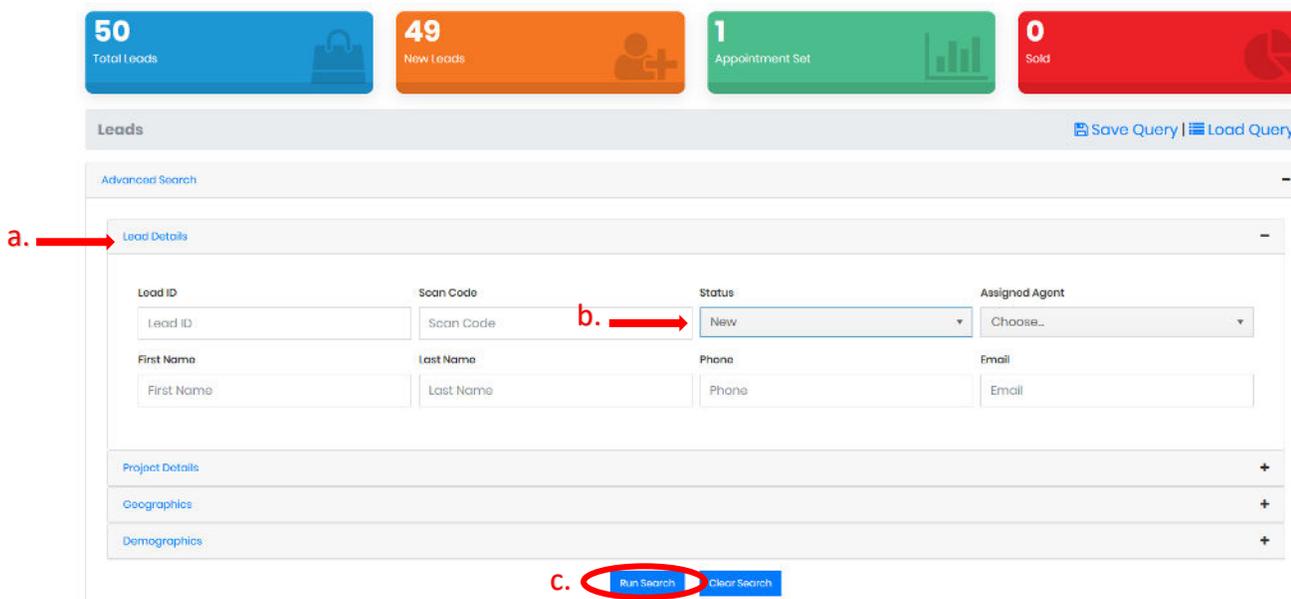


Figure 7. Running the Search Query with Selected Variables

Lead Details

First Name	Last Name	Phone	Email
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="Phone"/>	<input type="text" value="Email"/>
Status	Lead ID	Scan Code	
<input type="text" value="Choose..."/>	<input type="text" value="Lead ID"/>	<input type="text" value="Scan Code"/>	

Project Details

Geographics

Demographics

<input type="checkbox"/>	Lead ID	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
<input type="checkbox"/>	101866	11/28/2019	HELENA	ANDERSON	614 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE	
<input type="checkbox"/>	101817	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	101548	11/28/2019	MICHAEL	BLEACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM	
<input type="checkbox"/>	101503	11/28/2019	LORI	CUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	101424	11/28/2019	JEFFREY	WDEI	4862 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH	

Figure 8. Results from the Search Query

9. Print Lead Images

- From the Lead Grid you can select the leads you want to print. To select a lead, click on the empty check box in the far-left column (**Figure 9a**).
- To choose all leads on the page, select the empty check box in the header row (**Figure 9b**). This will select all 25, 50 or 100 leads on the current page depending on how many rows you have your grid set to show.

50
Total Leads

50
New Leads

0
Appointment Set

0
Sold

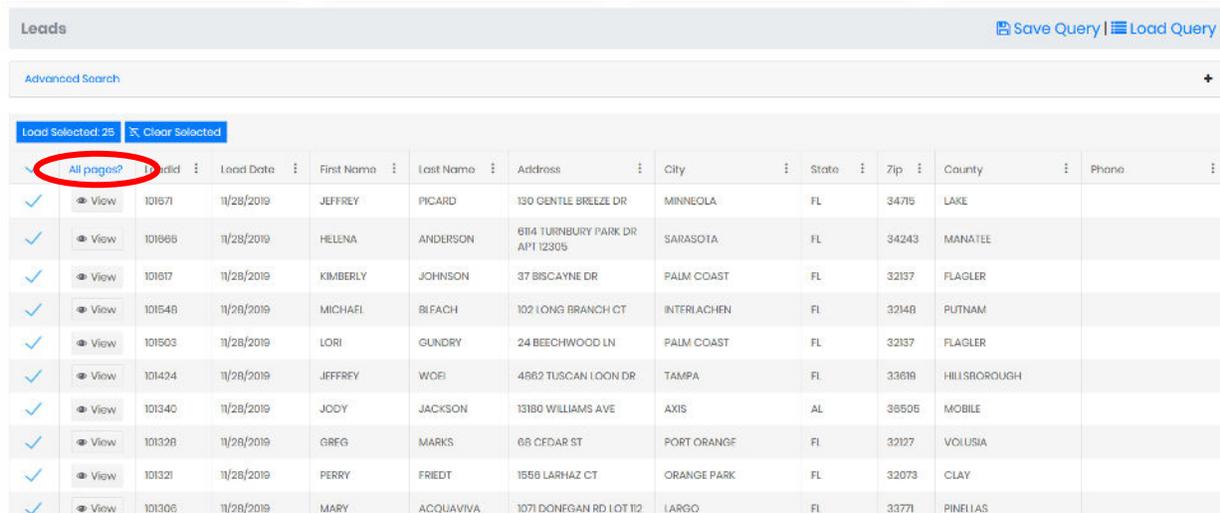
Leads [Save Query](#) | [Load Query](#)

Advanced Search +

<input type="checkbox"/>	Lead ID	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
<input type="checkbox"/>	101671	11/28/2019	JEFFREY	PICARD	130 GENTLE BREEZE DR	MINNEOLA	FL	34715	LAKE	
<input type="checkbox"/>	101866	11/28/2019	HELENA	ANDERSON	614 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE	
<input type="checkbox"/>	101817	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	101548	11/28/2019	MICHAEL	BLEACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM	
<input type="checkbox"/>	101503	11/28/2019	LORI	CUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	101424	11/28/2019	JEFFREY	WDEI	4862 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH	
<input type="checkbox"/>	101340	11/28/2019	JODY	JACKSON	13180 WILLIAMS AVE	AXIS	AL	36505	MOBILE	
<input type="checkbox"/>	101328	11/28/2019	GREG	MARKS	68 CEDAR ST	PORT ORANGE	FL	32127	VOLUSIA	

Figure 9. Selecting Singular or Multiple Leads

- If there are multiple pages of leads, you can click “All Pages” when it appears next to the check box (Figure 10). This will select all leads in your leads grid and may take a while to load, depending on how many leads are selected.

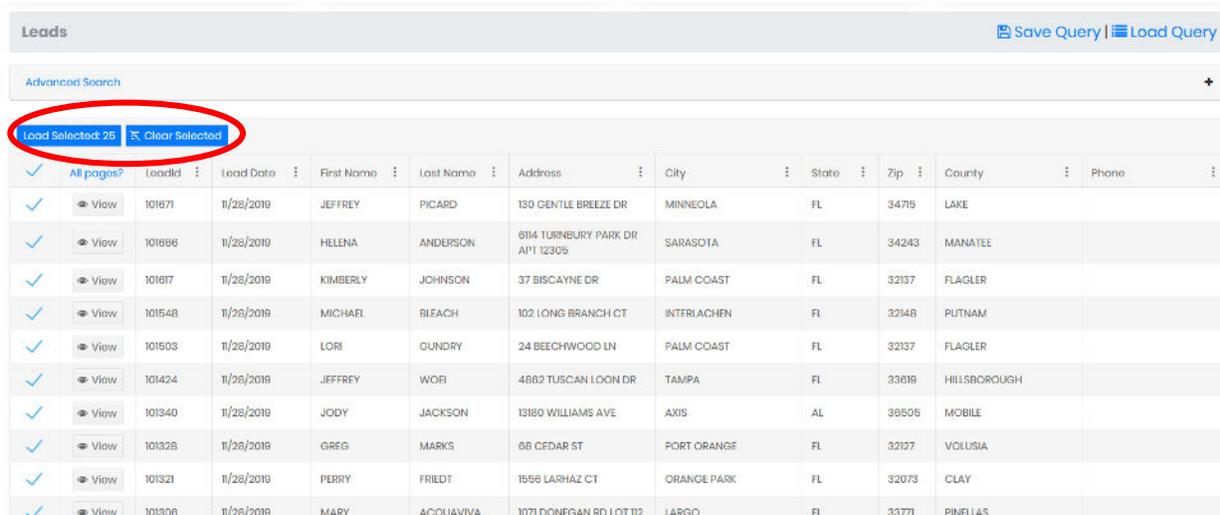


The screenshot shows a web interface for managing leads. At the top, there are buttons for 'Save Query' and 'Load Query'. Below that is an 'Advanced Search' section. The main area is a table with columns: Leadid, Lead Date, First Name, Last Name, Address, City, State, Zip, County, and Phone. The table contains 10 rows of lead data. Above the table, there is a status bar that says 'Load Selected: 25' and a 'Clear Selected' button. A red circle highlights the 'All pages?' checkbox, which is checked.

Leadid	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
101871	11/28/2019	JEFFREY	PICARD	130 GENTLE BREEZE DR	MINNEOLA	FL	34715	LAKE	
101866	11/28/2019	HELENA	ANDERSON	6114 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE	
101817	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER	
101548	11/28/2019	MICHAEL	BIFACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM	
101503	11/28/2019	LORI	GUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER	
101424	11/28/2019	JEFFREY	WOLF	4862 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH	
101340	11/28/2019	JODY	JACKSON	13180 WILLIAMS AVE	AXIS	AL	38505	MOBILE	
101328	11/28/2019	GREG	MARKS	68 CEDAR ST	PORT ORANGE	FL	32127	VOLUSIA	
101321	11/28/2019	PERRY	FRIEDT	1556 LARHAZ CT	ORANGE PARK	FL	32073	CLAY	
101306	11/28/2019	MARY	ACQUAVIVA	1071 DONEGAN RD LOT 112	LARGO	FL	33771	PINELLAS	

Figure 10. Selecting Multiple Pages of Leads

- If you selected the wrong rows, you can uncheck the box to remove it from the selection or you can start over by clicking on the button that reads “Clear Selected” located to the right of the “Load Selected” button. The lead grid will remember the leads you have selected until you uncheck the box or hit the “Clear Selected” button. This means you build the list you want by using multiple searches to easily locate the leads you are looking for.
- To load the leads to print, click on the button that reads “Load Selected”. The number located in this button will tell you how many leads you currently have selected in your queue. (Figure 11).



The screenshot shows the same web interface as Figure 10. The 'Load Selected: 25' button and the 'Clear Selected' button are highlighted with a red circle. The table below shows the same 10 rows of lead data as in Figure 10.

Leadid	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
101871	11/28/2019	JEFFREY	PICARD	130 GENTLE BREEZE DR	MINNEOLA	FL	34715	LAKE	
101866	11/28/2019	HELENA	ANDERSON	6114 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE	
101817	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER	
101548	11/28/2019	MICHAEL	BIFACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM	
101503	11/28/2019	LORI	GUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER	
101424	11/28/2019	JEFFREY	WOLF	4862 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH	
101340	11/28/2019	JODY	JACKSON	13180 WILLIAMS AVE	AXIS	AL	38505	MOBILE	
101328	11/28/2019	GREG	MARKS	68 CEDAR ST	PORT ORANGE	FL	32127	VOLUSIA	
101321	11/28/2019	PERRY	FRIEDT	1556 LARHAZ CT	ORANGE PARK	FL	32073	CLAY	
101306	11/28/2019	MARY	ACQUAVIVA	1071 DONEGAN RD LOT 112	LARGO	FL	33771	PINELLAS	

Figure 11. Loading or Clearing the Selected Leads

6. Once you click the “Load Selected” button all of the leads you have currently selected will be loaded into the grid, and a “Bulk Actions” menu will appear (**Figure 12**).
7. To print your leads, click on the words “Print Leads” under the Print/Export section.

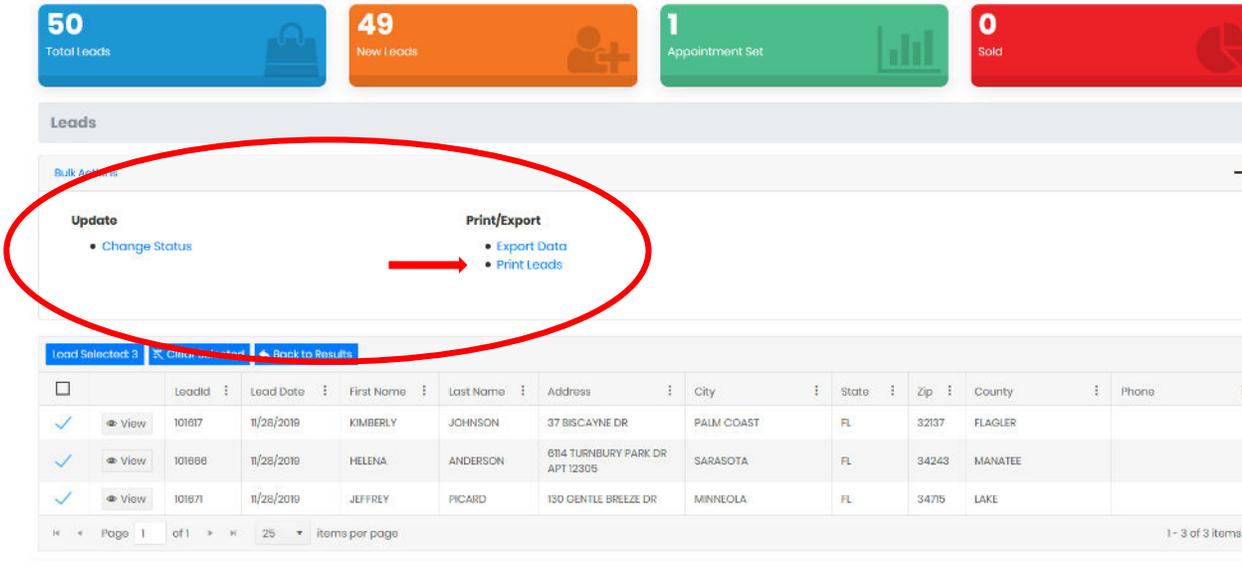


Figure 12. Printing Leads

8. You have two layout choices for printing leads: printing 1 lead per page or 3 leads per page. Select the layout you prefer from the dropdown menu (**Figure 13a**).
9. By default, the system will create a dummy image file for any leads that do not have an image. You can deselect this option by clicking on the checkmark if you prefer not to create a dummy image for those leads (**Figure 13b**).
10. Click the button labeled “Print/Create PDF” (**Figure 13c**).
11. To exit without printing and return to the bulk actions, simply click the “Exit” button (**Figure 13d**).

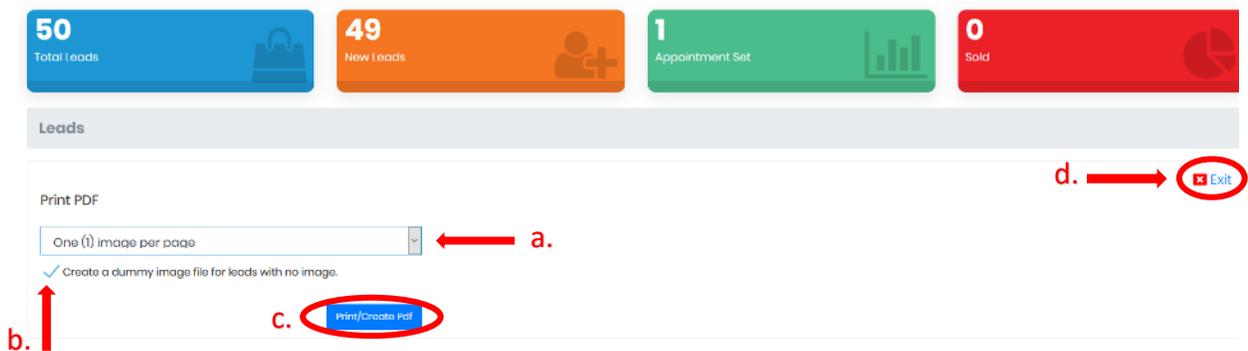


Figure 13. Selecting Printing Options

12. Once you click on “Print/Create PDF”, you should then see a pop-up success message confirming your leads have been sent to the print queue.

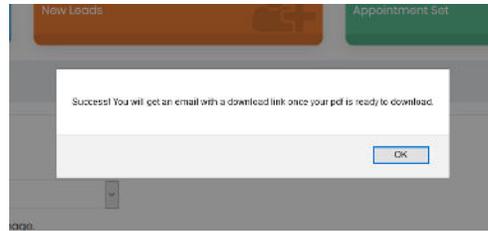


Figure 14. Success Message after Printing

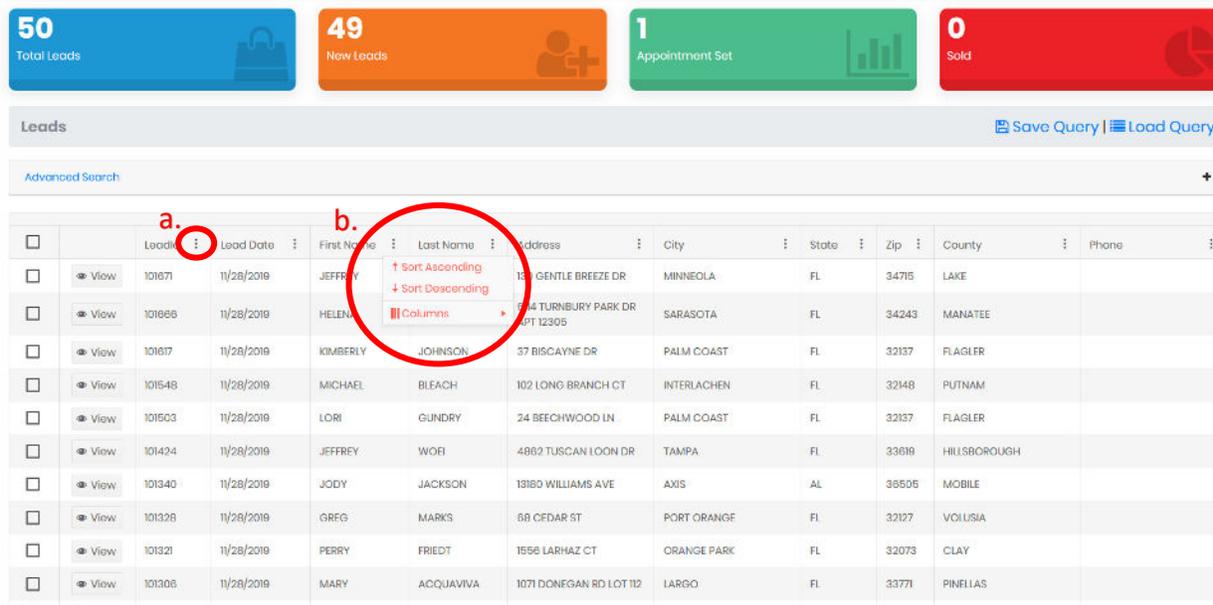
13. Once the PDF has been processed and your leads are ready to print, you will receive an email with a link to download your PDF. The download link is good for 7 days so remember to download and print your leads before the link expires or you will need to create a new PDF to print them again. You will usually receive your email within a few minutes of your request; however, if there are many other print requests ahead of you in the print queue it may take a little longer. If you do not see the email, remember to check your junk/spam folder.

ADVANCED FEATURES

10. Add Data Fields to the Lead Grid View

You can customize the Lead Grid to your preferences. For instance, you might want to include phone numbers or project codes.

1. From the Lead Grid, click on the three dots in the column header of any column **(Figure 15a)**.
2. A dropdown menu will appear. Click on “Columns” **(Figure 15b)**.



The screenshot shows a dashboard with four metrics: 50 Total Leads, 49 New Leads, 1 Appointment Set, and 0 Sold. Below the metrics is a 'Leads' section with 'Save Query' and 'Load Query' buttons. An 'Advanced Search' bar is also present. The main table has columns: Lead ID, Lead Date, First Name, Last Name, Address, City, State, Zip, County, and Phone. Annotations 'a' and 'b' highlight the three-dot menu in the 'Lead ID' header and the 'Columns' option in the dropdown menu for the 'Last Name' column, respectively.

Lead ID	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
101671	11/28/2019	JEFFREY		130 GENTLE BREEZE DR	MINNEOLA	FL	34715	LAKE	
101866	11/28/2019	HELEN		104 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE	
101617	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER	
101548	11/28/2019	MICHAEL	BLEACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM	
101503	11/28/2019	LORI	GUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER	
101424	11/28/2019	JEFFREY	WOEI	4882 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH	
101340	11/28/2019	JODY	JACKSON	13180 WILLIAMS AVE	AXIS	AL	38505	MOBILE	
101326	11/28/2019	GREG	MARKS	68 CEDAR ST	PORT ORANGE	FL	32127	VOULSIA	
101321	11/28/2019	PERRY	FRIEDT	1556 LARHAZ CT	ORANGE PARK	FL	32073	CLAY	
101306	11/28/2019	MARY	ACQUAVIVA	1071 DONEGAN RD LOT 112	LARGO	FL	33771	PINEHILLS	

Figure 15. Selecting a Column’s Preferences

3. A flyout menu will appear. The fields with a check mark next to them that already appear in your Lead Grid. Select any data fields you would like to add to the Lead Grid by clicking on the empty box next to it. **(Figure 16)**

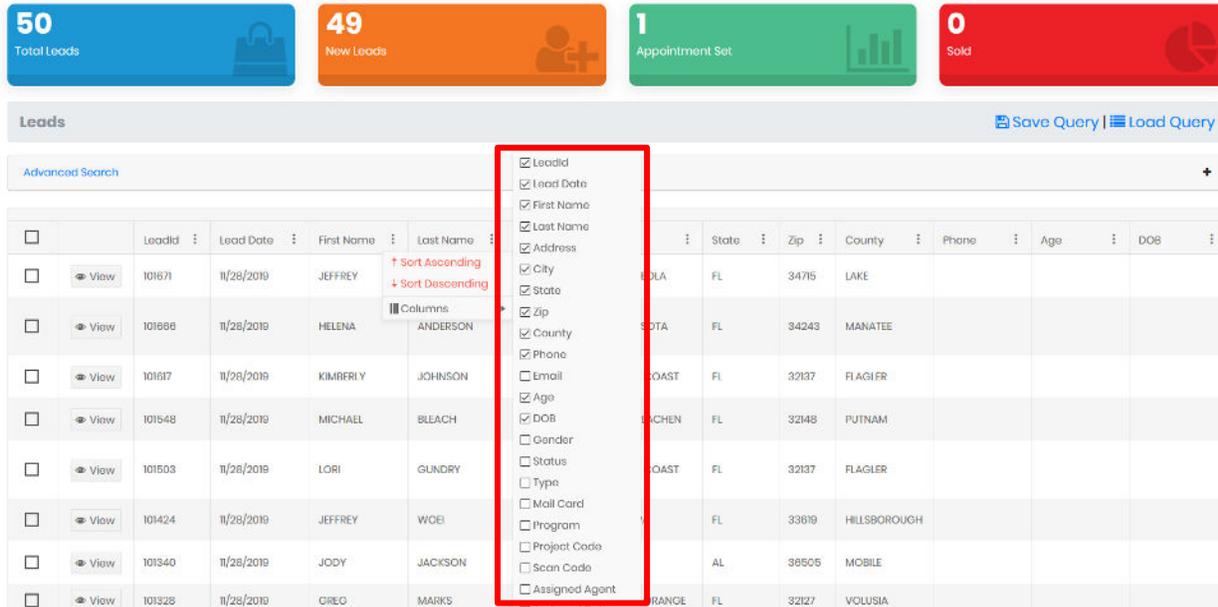


Figure 16. Modifying the Columns that are Shown and Hidden

4. Deselect any fields you would like to remove by clicking on the check mark (leaving the box next to the field name empty).
5. Simply click anywhere on the Lead Grid to exit this flyout menu.

As you make changes to the lead grid, they are automatically saved so that the grid always displays your data the way you want to see it.

11. Reorder the Columns in the Lead Grid

Reordering the columns in the Lead Grid is simple and can save you time by putting the most important information up front. For instance, if you are making phone calls, you might want the phone number in the column after the name. And if you are making in-person visits, you may want county and address in the first few columns.

1. From the Lead Grid, click and hold the cursor on the title of the column you would like to move. **(Figure 17)**
2. Drag your cursor toward the desired location and release the cursor when you have the column over the new position where you would like it to be located. **(Figure 18)**

50
Total Leads

49
New Leads

1
Appointment Set

0
Sold

Leads Save Query | Load Query

Advanced Search +

<input type="checkbox"/>		Leadid	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
<input type="checkbox"/>	View	101671	11/28/2019	JEFFREY	PICARD	130 GENTLE BREEZE DR	MINNEOLA	FL	34715	LAKE	
<input type="checkbox"/>	View	101666	11/28/2019	HELENA	ANDERSON	6114 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE	
<input type="checkbox"/>	View	101617	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	View	101548	11/28/2019	MICHAEL	BLEACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM	
<input type="checkbox"/>	View	101503	11/28/2019	LORI	GUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	View	101424	11/28/2019	JEFFREY	WOEI	4862 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH	
<input type="checkbox"/>	View	101340	11/28/2019	JODY	JACKSON	13180 WILLIAMS AVE	AXIS	AL	36505	MOBILE	

Figure 17. Reordering Lead Grid

50
Total Leads

49
New Leads

1
Appointment Set

0
Sold

Leads Save Query | Load Query

Advanced Search +

<input type="checkbox"/>		Leadid	Lead Date	First Name	Last Name	Phone	Address	City	State	Zip	County	Phone
<input type="checkbox"/>	View	101671	11/28/2019	JEFFREY	PICARD	130 GENTLE BREEZE DR	MINNEOLA	FL	34715	LAKE		
<input type="checkbox"/>	View	101666	11/28/2019	HELENA	ANDERSON	6114 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE		
<input type="checkbox"/>	View	101617	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER		
<input type="checkbox"/>	View	101548	11/28/2019	MICHAEL	BLEACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM		
<input type="checkbox"/>	View	101503	11/28/2019	LORI	GUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER		
<input type="checkbox"/>	View	101424	11/28/2019	JEFFREY	WOEI	4862 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH		
<input type="checkbox"/>	View	101340	11/28/2019	JODY	JACKSON	13180 WILLIAMS AVE	AXIS	AL	36505	MOBILE		

Figure 18. Moving Selected Column

50
Total Leads

49
New Leads

1
Appointment Set

0
Sold

Leads Save Query | Load Query

Advanced Search +

Phone is now before Address

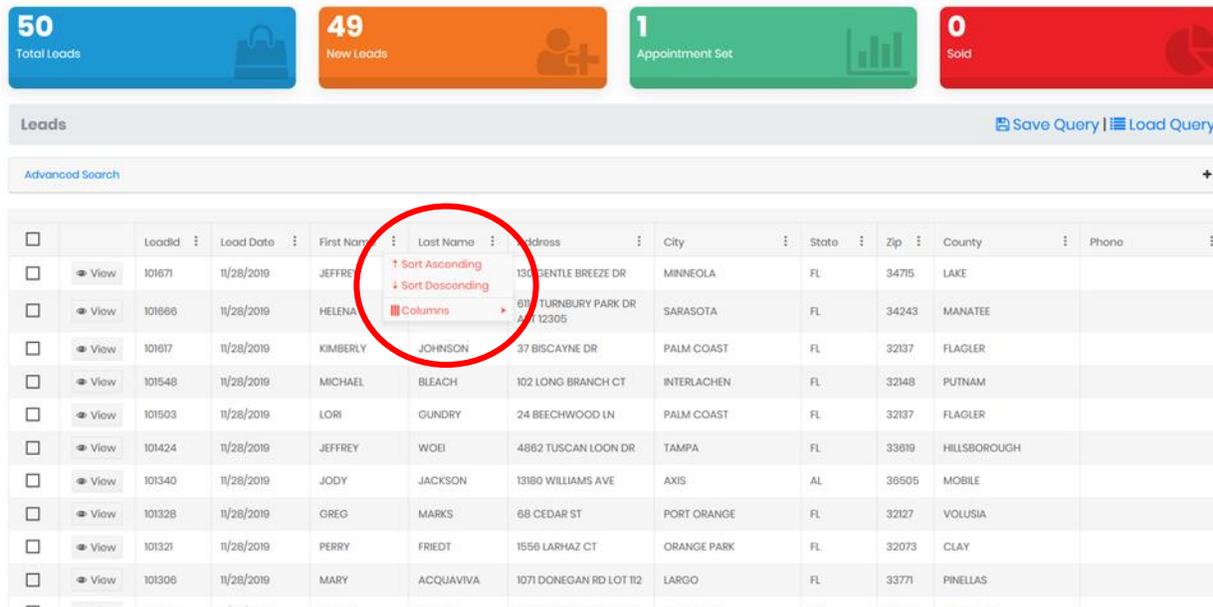
<input type="checkbox"/>		Leadid	Lead Date	First Name	Last Name	Phone	Address	City	State	Zip	County
<input type="checkbox"/>	View	101671	11/28/2019	JEFFREY	PICARD	130 GENTLE BREEZE DR	MINNEOLA	FL	34715	LAKE	
<input type="checkbox"/>	View	101666	11/28/2019	HELENA	ANDERSON	6114 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE	
<input type="checkbox"/>	View	101617	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	View	101548	11/28/2019	MICHAEL	BLEACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM	
<input type="checkbox"/>	View	101503	11/28/2019	LORI	GUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	View	101424	11/28/2019	JEFFREY	WOEI	4862 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH	
<input type="checkbox"/>	View	101340	11/28/2019	JODY	JACKSON	13180 WILLIAMS AVE	AXIS	AL	36505	MOBILE	

Figure 19. Lead Grid View after Reordering Columns

12. Sort the Column Data in the Lead Grid

You can sort the data in your lead grid to allow you to see your older leads first so you can work them before they become stale, or to view leads by county so you can plan in-person meetings.

1. From the Lead Grid, click on the three dots in the column header of the data you would like to sort.
2. A dropdown menu will appear. From the dropdown menu, choose whether to sort the data by ascending or descending order. **(Figure 20)**



The screenshot shows a dashboard with four summary cards: '50 Total Leads' (blue), '49 New Leads' (orange), '1 Appointment Set' (green), and '0 Sold' (red). Below the cards is a 'Leads' section with 'Save Query' and 'Load Query' buttons. An 'Advanced Search' bar is visible. The main table has columns: Leadid, Lead Date, First Name, Last Name, Address, City, State, Zip, County, and Phone. The 'Last Name' column header has a three-dot menu open, showing 'Sort Ascending', 'Sort Descending', and 'Columns' options. A red circle highlights this menu.

Leadid	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
101671	11/28/2019	JEFFRE		130 GENTLE BREEZE DR	MINNEOLA	FL	34715	LAKE	
101666	11/28/2019	HELENA		617 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE	
10167	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER	
101548	11/28/2019	MICHAEL	BLEACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM	
101503	11/28/2019	LORI	GUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER	
101424	11/28/2019	JEFFREY	WOEI	4862 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH	
101340	11/28/2019	JODY	JACKSON	13180 WILLIAMS AVE	AXIS	AL	36505	MOBILE	
101328	11/28/2019	GREG	MARKS	68 CEDAR ST	PORT ORANGE	FL	32127	VOLUSIA	
101321	11/28/2019	PERRY	FRIEDT	1556 LARHAZ CT	ORANGE PARK	FL	32073	CLAY	
101306	11/28/2019	MARY	ACQUAVIVA	1071 DONEGAN RD LOT 112	LARGO	FL	33771	PINELLAS	

Figure 20. Selecting a Columns' Preferences

13. Create and Save Queries Using Advanced Search

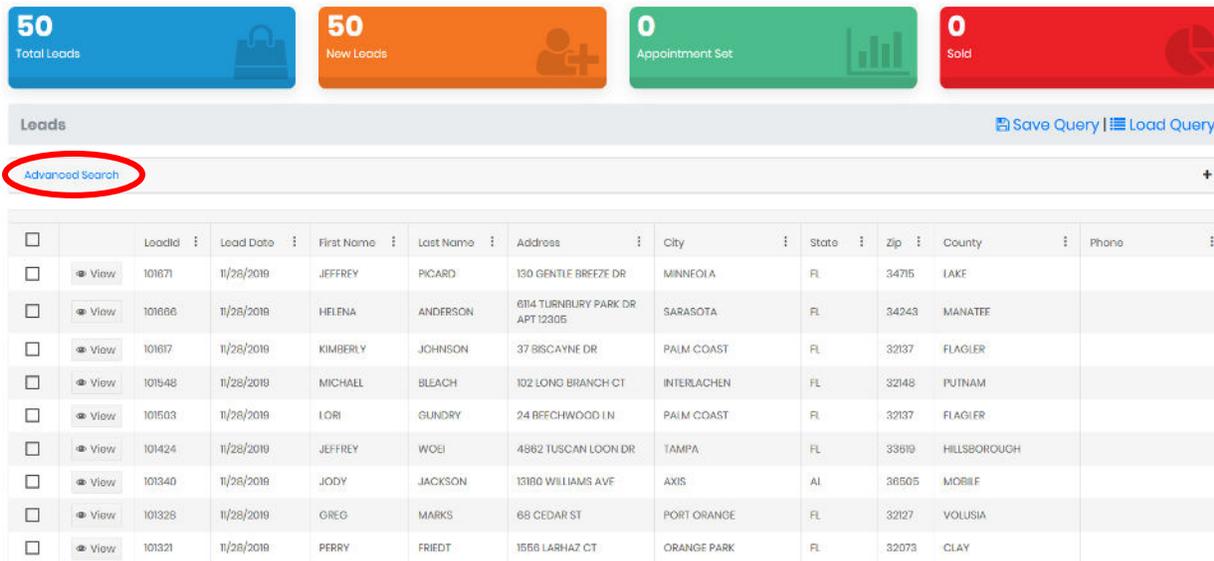
The Advanced Search features enables you to search your leads and create and save reports or queries. The search fields are broken into four categories.

- **Lead Details:** You can search by lead details such as a lead's Last Name, Scan Code or Status. Searching by lead status can be particularly helpful. If you wanted to see all the leads you have scheduled appointments with, for instance, you would search for "Appointment Set." Remember: keeping your lead statuses up-to-date is extremely important. If the data is inaccurate, your search results will be inaccurate. The better you are about updating lead data, the more robust your searches and reports will be.
- **Project Details:** You can search by project details such as Program Type (Final Expense, Mortgage Protection, etc.), Lead Type (Direct Mail, Digital, etc.), and Lead Date.
- **Geographics:** You can search by geographic data including state, county, city, and zip code. This might come in handy if you wanted to run a report for a certain zip code where you already have an appointment scheduled. You could use that report to work those leads first in the hopes of scheduling more appointments while you are in the area.

- Note: In order to choose a county, you must first choose a state.
- Note: You can search for multiple states and counties at once.
- **Demographics:** You can search by demographic data such as gender or age if you have added this information to the database yourself (Remember: This information is not included for new leads so you have to collect it from the lead card or by personally speaking with the lead and add the new data into the database fields).

a. Create a Query

1. To search your leads, start in the Lead Grid. Click on “Advanced Search” to open up the search categories. **(Figure 21)**



The screenshot shows a dashboard with four colored cards: 50 Total Leads (blue), 50 New Leads (orange), 0 Appointment Set (green), and 0 Sold (red). Below these is a 'Leads' section with 'Save Query' and 'Load Query' buttons. A red circle highlights the 'Advanced Search' button. Below that is a table with the following data:

	LeadId	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
<input type="checkbox"/>	View 101671	11/28/2019	JEFFREY	PICARD	130 GENTLE BREEZE DR	MINNEOLA	FL	34715	LAKE	
<input type="checkbox"/>	View 101886	11/28/2019	HELENA	ANDERSON	6114 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE	
<input type="checkbox"/>	View 101617	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	View 101948	11/28/2019	MICHAEL	BLEACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM	
<input type="checkbox"/>	View 101503	11/28/2019	LORI	GUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	View 101424	11/28/2019	JEFFREY	WOEL	4962 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH	
<input type="checkbox"/>	View 101340	11/28/2019	JODY	JACKSON	13180 WILLIAMS AVE	AXIS	AL	36505	MOBILE	
<input type="checkbox"/>	View 101325	11/28/2019	GREG	MARKS	68 CEDAR ST	PORT ORANGE	FL	32127	VOLUSIA	
<input type="checkbox"/>	View 101321	11/28/2019	PERRY	FRIEDT	1556 LARHAZ CT	ORANGE PARK	FL	32073	CLAY	

Figure 21. Performing an Advanced Search Query

2. Click on the category of the criteria you want to search: Lead Details, Project Details, Geographics or Demographics. For example, if you want to see all of your leads from the state of Alabama, click on “Geographics”. **(Figure 22a)**
3. Choose the field for the criteria you are searching for. For the Alabama example, you would click on the State field and choose Alabama from the dropdown menu **(Figure 22b)**.
4. Click the “Run Search” button **(Figure 22c)**.

The screenshot shows a dashboard with four summary cards: '50 Total Leads' (blue), '49 New Leads' (orange), '1 Appointment Set' (green), and '0 Sold' (red). Below these is a 'Leads' section with 'Save Query' and 'Load Query' links. An 'Advanced Search' panel is open, showing expandable sections for 'Lead Details', 'Project Details', and 'Geographics'. The 'Geographics' section is expanded, revealing input fields for 'State', 'County', 'City', and 'Zip'. A dropdown menu for 'State' is open, listing states from ALABAMA to CONNECTICUT. At the bottom of the search panel, there are 'Run Search' and 'Clear Search' buttons. Red annotations include: 'a.' pointing to the 'Geographics' section header, 'b.' pointing to the 'State' dropdown menu, and 'c.' pointing to the 'Run Search' button.

Figure 22. Selecting Query Parameters

5. The search results will appear in the Lead Grid below the search box below (Figure 23a).
6. If you make a mistake or need to start over, click the “Clear Search” button located to the right of the “Run Search” button (Figure 23b).

This screenshot shows the search results interface. The 'Advanced Search' panel is at the top, with 'Geographics' expanded. Below it are 'Run Search' and 'Clear Search' buttons. A red arrow labeled 'b.' points to the 'Clear Search' button. Below the search panel is a table of results. A red circle labeled 'a.' encompasses the first two rows of the table. The table has columns for 'Leadid', 'Lead Date', 'First Name', 'Last Name', 'Address', 'City', 'State', 'Zip', 'County', 'Phone', 'Age', and 'DOB'. The first row shows lead 101340 for JODY JACKSON in ALABAMA. The second row shows lead 101077 for CAROLYN BIRO in ALABAMA.

Leadid	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone	Age	DOB
101340	11/28/2019	JODY	JACKSON	13180 WILLIAMS AVE	AXIS	AL	36505	MOBILE			
101077	11/29/2019	CAROLYN	BIRO	1512 MARION ST SW	DECATUR	AL	35601	MORGAN			

Figure 23. Results from a Query

b. Save a Query

After running a search, you can save that search as a query. This saves time and effort. For example, rather than searching for new leads every time you open the system, you can create and save the search for new leads as a query and then run that query whenever you want to see new leads.

1. After running a search, click on the words “Save Query” (Figure 24).

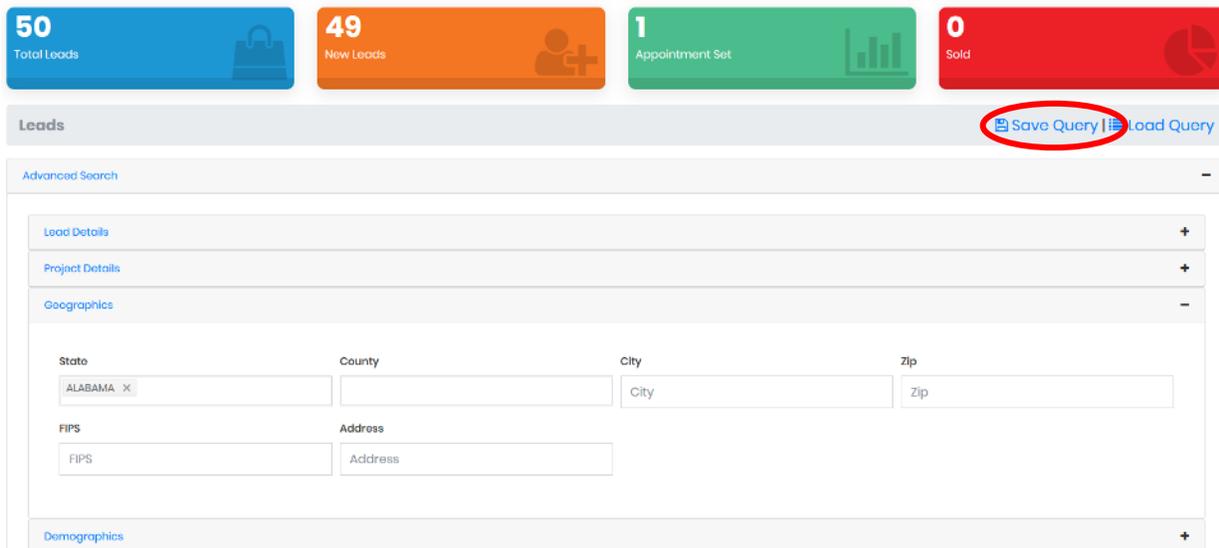


Figure 24. Saving a Query After Selecting Desired Parameters

2. You will see a new dialog box with a blank under “Query Title.” Type in a name for your query in that space and click the button “Save as New” to save the query. (ex: Alabama Leads) (Figure 25).

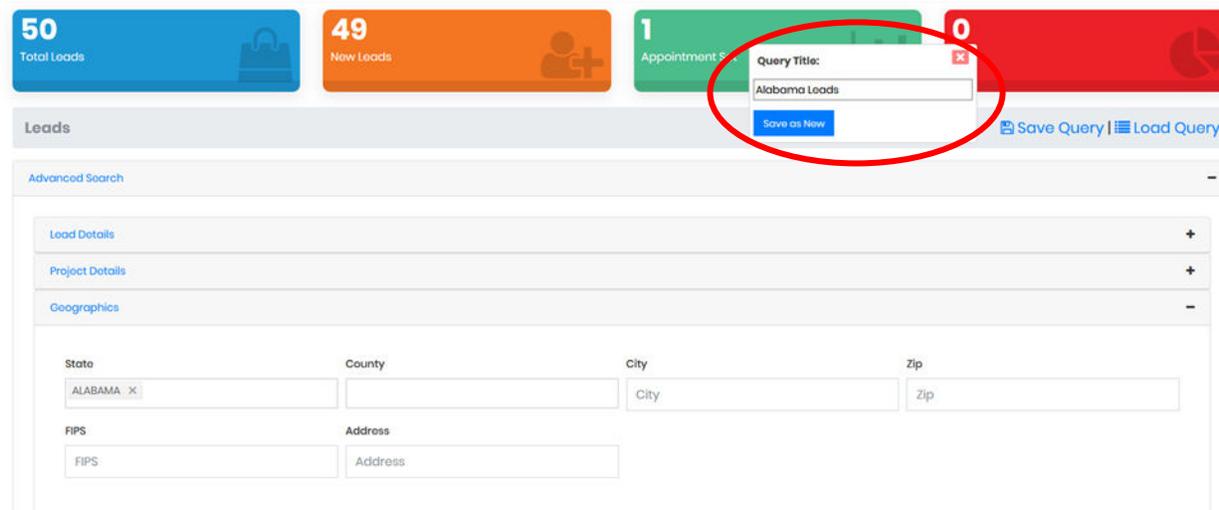


Figure 25. Naming a Query

c. Load a Query

Once you have created and saved a query, you can load or run that query, simply by choosing it from a dropdown menu.

1. Click on “Load Query” in the upper right corner (**Figure 26**).

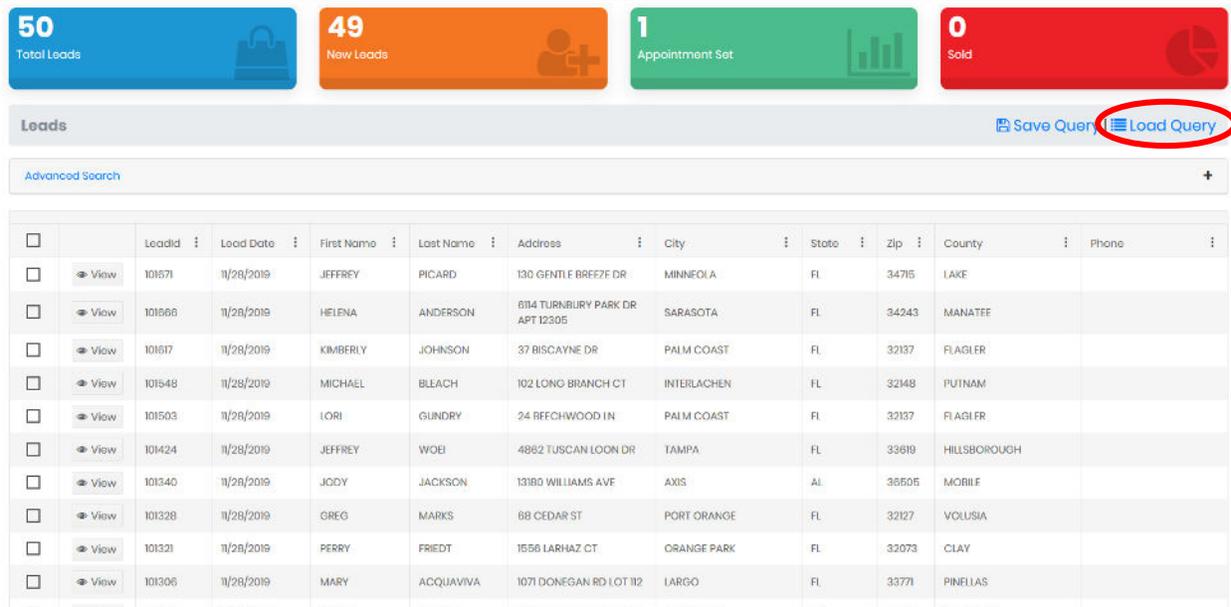


Figure 26. Loading a Query

2. Click on the dropdown menu that appeared above “Load Query” and choose the name of the query you want to load (example: Alabama Leads). Once your query has been loaded the name will appear in the header of the Advanced Search. (**Figure 27**).

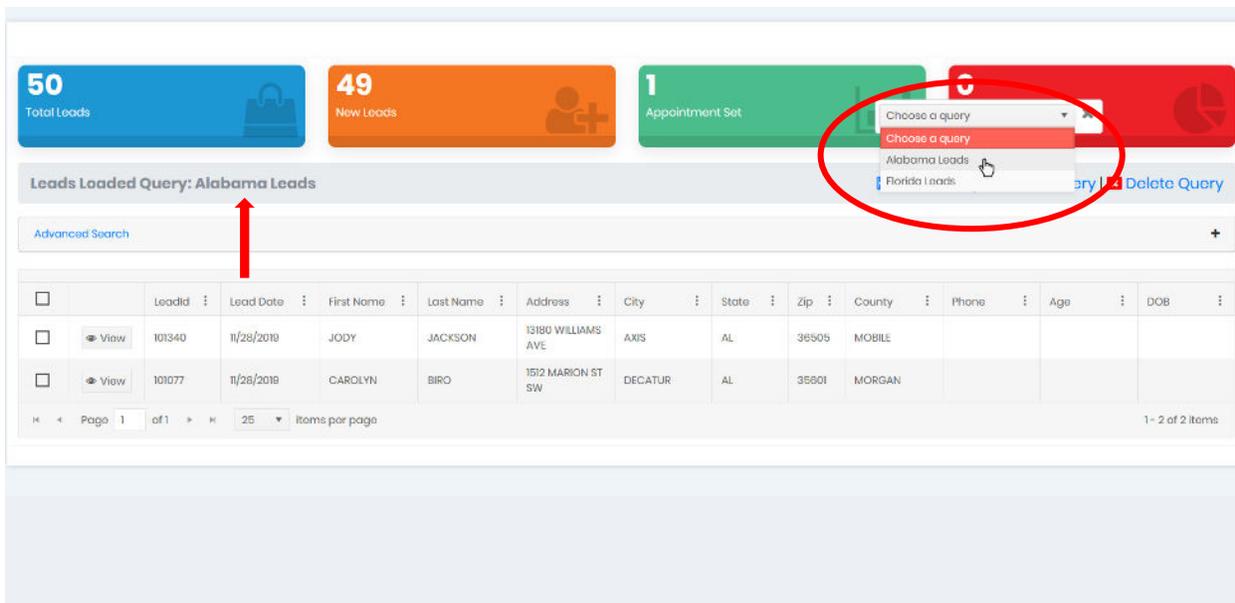


Figure 27. Selecting a Previously Saved Query

3. Selecting a query will automatically apply the saved filters and run a search to update the lead grid. The results from your query will appear in the Lead Grid below the search box (**Figure 28**).

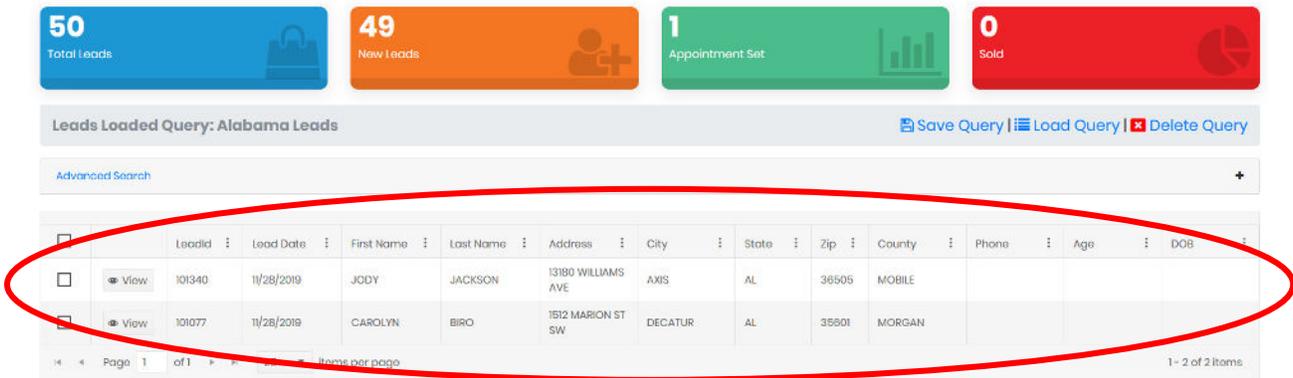


Figure 28. Results from Loaded Query

14. Updating Bulk Data

The Bulk Actions feature allows you to update a bunch of leads all at once. As you can imagine, this saves a lot of time and effort. If you want to update or export data, you need to use the Bulk Action feature.

a. Change Lead Status: Bulk Update

This is a helpful function that allows you to update the status of many leads at once.

1. From the Lead Grid, select the rows of data you want to update. To select a row, click on the empty check box in the far-left column. (**Figure 29a**)
2. To choose all rows on the page, select the empty check box in the header row. (**Figure 29b**)

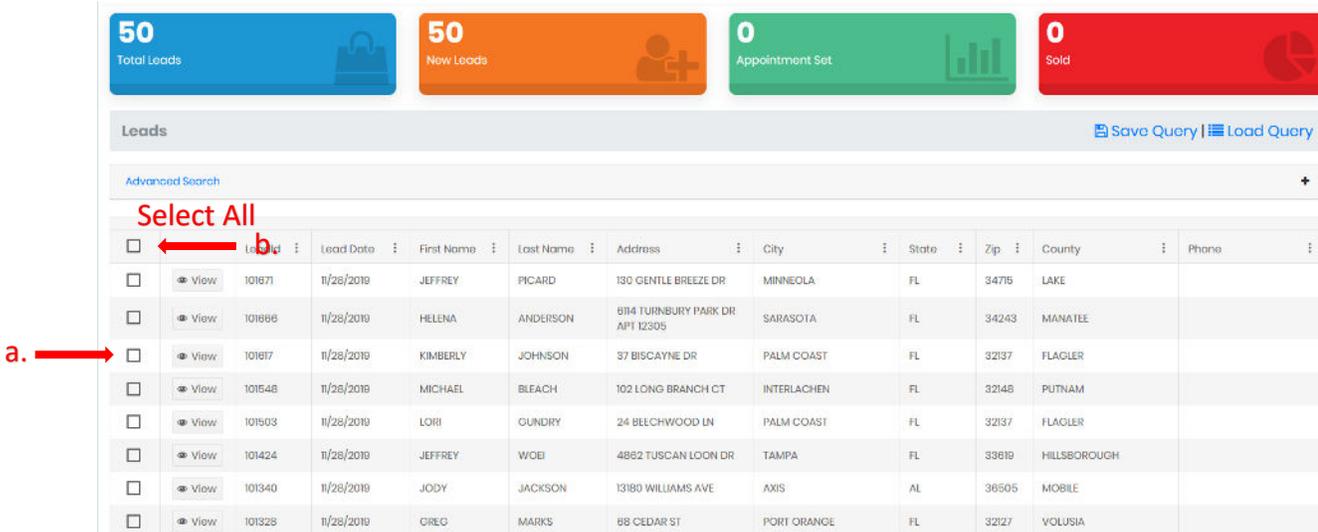
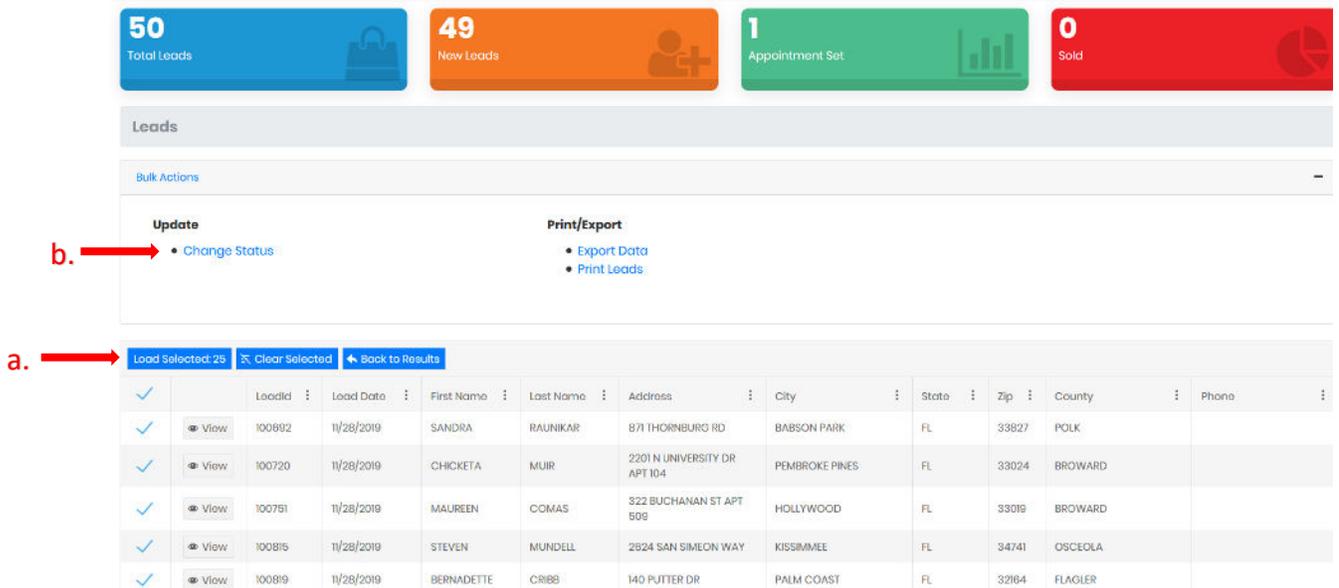


Figure 29. Selecting Singular or Multiple Leads

3. To load the leads to edit, click on the button that reads “Load Selected”. **(Figure 30a)**
4. If you selected the wrong rows, you can uncheck the box to remove it from the selection or you can start over by clicking the button that reads “Clear Selected” located to the right of the “Load Selected” button.
5. Once you click the “Load Selected” button, only the leads you have selected will be loaded in the grid, and a “Bulk Actions” menu will appear.
6. To change the status of multiple leads, click on “Change Status” under the “Update” section. **(Figure 30b)**



50 Total Leads

49 New Leads

1 Appointment Set

0 Sold

Leads

Bulk Actions

Update

- Change Status

Print/Export

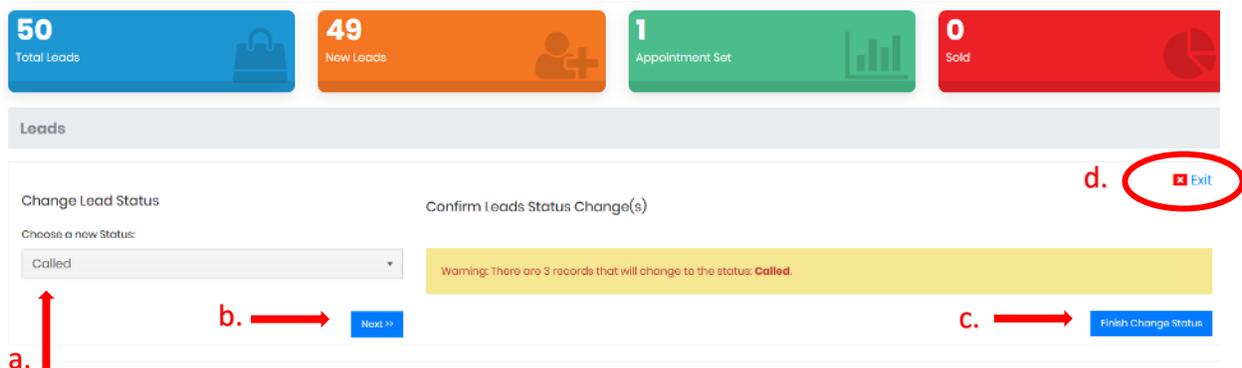
- Export Data
- Print Leads

a. Load Selected: 25 Clear Selected Back to Results

	Leadid	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
<input checked="" type="checkbox"/>	100692	11/28/2019	SANDRA	RAUNIKAR	871 THORNBERG RD	BABSON PARK	FL	33827	POLK	
<input checked="" type="checkbox"/>	100720	11/28/2019	CHICKETA	MUIR	2201 N UNIVERSITY DR APT 104	PEMBROKE PINES	FL	33024	BROWARD	
<input checked="" type="checkbox"/>	100751	11/28/2019	MAUREEN	COMAS	322 BUCHANAN ST APT 508	HOLLYWOOD	FL	33019	BROWARD	
<input checked="" type="checkbox"/>	100815	11/28/2019	STEVEN	MUNDELL	2824 SAN SIMEON WAY	KISSIMMEE	FL	34741	OSCEOLA	
<input checked="" type="checkbox"/>	100819	11/28/2019	BERNADETTE	CRIBB	140 PUTTER DR	PALM COAST	FL	32164	FLAGLER	

Figure 30. Loading Bulk Selected and Changing the Status of Multiple Leads

7. Choose a new status from the dropdown menu. **(Figure 31a)**
8. Click the button labeled “Next”. **(Figure 31b)**
9. The system will ask you to confirm this status update. If everything looks good, click the button labeled “Finish Change Status”. **(Figure 31c)**
10. If something looks wrong or you have made a mistake, simple click the “Exit” button. **(Figure 31d)**



50 Total Leads

49 New Leads

1 Appointment Set

0 Sold

Leads

Change Lead Status

Confirm Leads Status Change(s)

Choose a new Status:

Called

Warning: There are 3 records that will change to the status: **Called**.

a.

b. Next

c. Finish Change Status

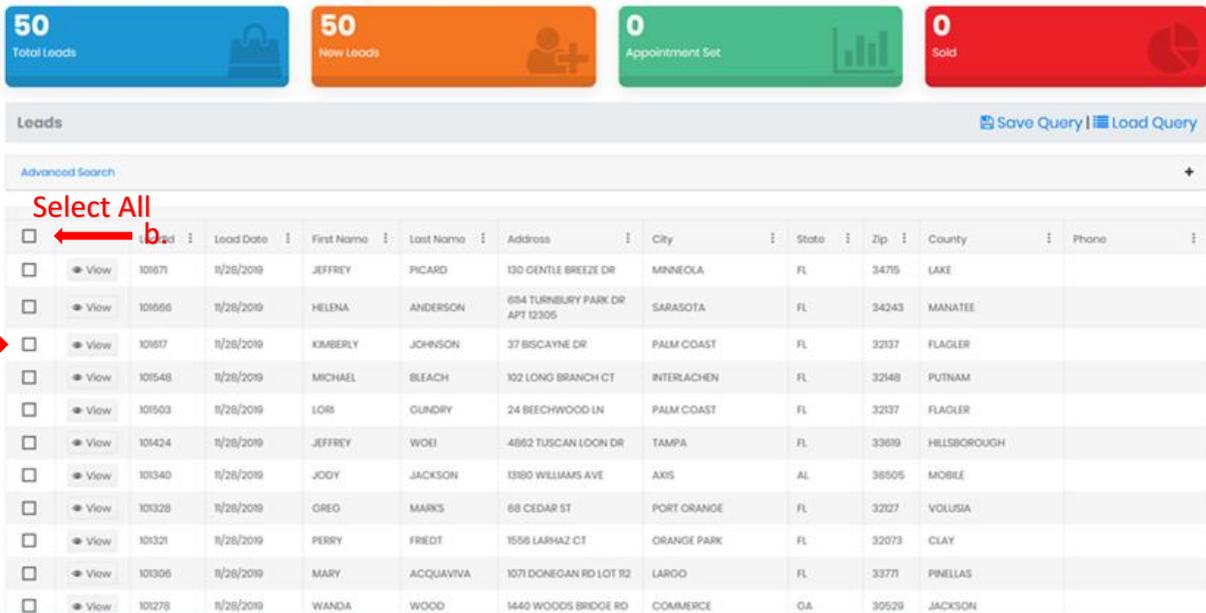
d. Exit

Figure 31. Selecting New Lead Status

b. Export Lead Data: Bulk Update

Leads will export in the same order as they appear in the Lead Grid. Before you export the leads make sure the appropriate columns are visible and in the order you would like them exported. (See Section 11 - Reorder the Columns in the Lead Grid and Section 12 - Sort the Columns in the Lead Grid).

1. From the Lead Grid, select the rows of data you want to update. To select a row, click on the empty check box in the far-left column. **(Figure 32a)**
2. To choose all rows on the page, select the empty check box in the header row. **(Figure 32b)**

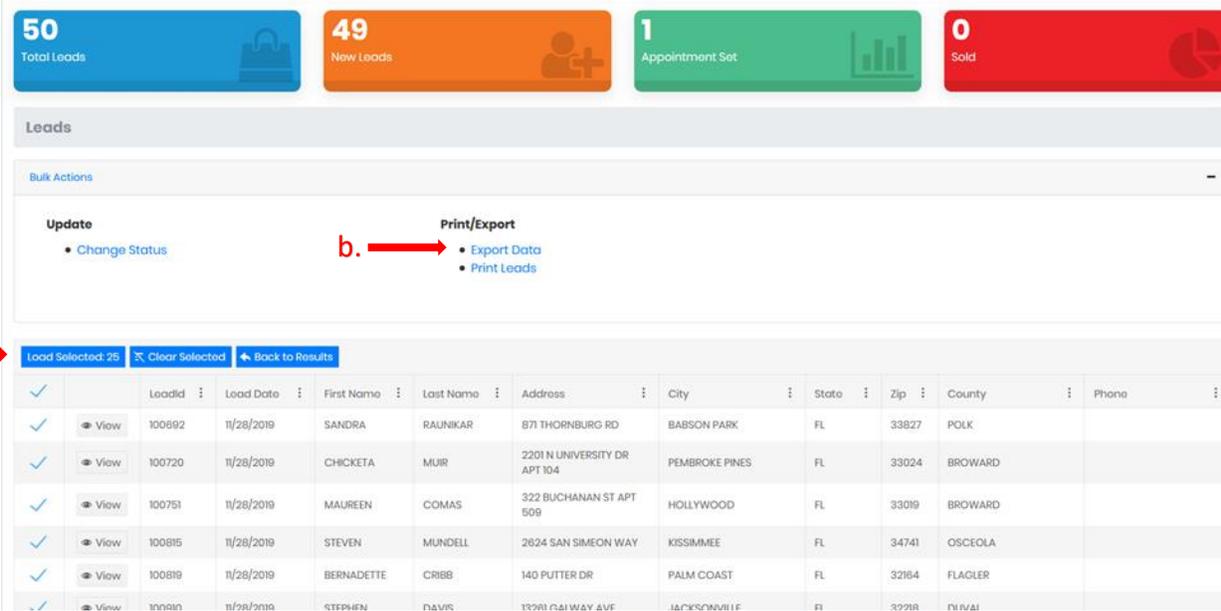


The screenshot shows a dashboard with four colored boxes: 50 Total Leads (blue), 50 New Leads (orange), 0 Appointment Set (green), and 0 Sold (red). Below these is a 'Leads' section with 'Save Query' and 'Load Query' buttons. An 'Advanced Search' bar is present. The main table has columns: Lead ID, Lead Date, First Name, Last Name, Address, City, State, Zip, County, and Phone. A 'Select All' checkbox is in the header row. Red arrows labeled 'a.' and 'b.' point to the checkboxes in the first data row and the 'Select All' checkbox, respectively.

<input type="checkbox"/>	Lead ID	Lead Date	First Name	Last Name	Address	City	State	Zip	County	Phone
<input type="checkbox"/>	101671	11/28/2019	JEFFREY	PICARD	130 GENTLE BREEZE DR	MINNEOLA	FL	34715	LAKE	
<input type="checkbox"/>	101666	11/28/2019	HELENA	ANDERSON	694 TURNBURY PARK DR APT 12305	SARASOTA	FL	34243	MANATEE	
<input type="checkbox"/>	101617	11/28/2019	KIMBERLY	JOHNSON	37 BISCAYNE DR	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	101548	11/28/2019	MICHAEL	BLEACH	102 LONG BRANCH CT	INTERLACHEN	FL	32148	PUTNAM	
<input type="checkbox"/>	101503	11/28/2019	LOR	OUNDRY	24 BEECHWOOD LN	PALM COAST	FL	32137	FLAGLER	
<input type="checkbox"/>	101424	11/28/2019	JEFFREY	WOEL	4862 TUSCAN LOON DR	TAMPA	FL	33619	HILLSBOROUGH	
<input type="checkbox"/>	101340	11/28/2019	JODY	JACKSON	1380 WILLIAMS AVE	AXIS	AL	36505	MOBILE	
<input type="checkbox"/>	101328	11/28/2019	OREO	MARKS	68 CEDAR ST	PORT ORANGE	FL	32127	VOLUSIA	
<input type="checkbox"/>	101321	11/28/2019	PERRY	FREDT	1556 LARHAZ CT	ORANGE PARK	FL	32073	CLAY	
<input type="checkbox"/>	101306	11/28/2019	MARY	ACQUAVIVA	1071 DONEGAN RD LOT B2	LARGO	FL	33771	PINELLAS	
<input type="checkbox"/>	101278	11/28/2019	WANDA	WOOD	1440 WOODS BRIDGE RD	COMMERCE	GA	30529	JACKSON	

Figure 32. Selecting Singular or Multiple Leads

3. To load the leads to edit, click on the button that reads “Load Selected”. **(Figure 33a)**
4. If you selected the wrong rows, you can uncheck the box to remove it from the selection or you can start over by clicking the button that reads “Clear Selected” located to the right of the “Load Selected” button.
5. Once you click the “Load Selected” button only the leads you have selected will be loaded in the grid, and a “Bulk Actions” menu will appear.
6. To export the selected leads, click on “Export Data” under the “Print/Export” section. Your download will begin automatically. **(Figure 33b)**



50 Total Leads

49 New Leads

1 Appointment Set

0 Sold

Leads

Bulk Actions

Update

- Change Status

Print/Export

- Export Data
- Print Leads

Load Selected: 25 Clear Selected Back to Results

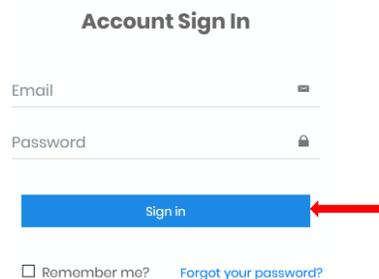
	Leadid	Load Date	First Name	Last Name	Address	City	State	Zip	County	Phone
✓	100692	11/28/2019	SANDRA	RAUNIKAR	871 THORNBERG RD	BABSON PARK	FL	33827	POLK	
✓	100720	11/28/2019	CHICKETA	MUIR	2201 N UNIVERSITY DR APT 104	PEMBROKE PINES	FL	33024	BROWARD	
✓	100751	11/28/2019	MAUREEN	COMAS	322 BUCHANAN ST APT 509	HOLLYWOOD	FL	33019	BROWARD	
✓	100815	11/28/2019	STEVEN	MUNDELL	2624 SAN SIMEON WAY	KISSIMEE	FL	34741	OSCEOLA	
✓	100819	11/28/2019	BERNADETTE	CRIBB	140 PUTTER DR	PALM COAST	FL	32184	FLAGLER	
✓	100821	11/28/2019	STEPHEN	DAVIS	12981 CLAYWAY AVE	JACKSONVILLE	FL	32218	DUVAL	

Figure 33. Loading Bulk Selected and Exporting Lead Data

15. Reset Your Password

It is easy to reset your password if you forget it or want to update it for security reasons.

1. Go to the LMS homepage: <https://impact.mylms.com>
2. Click on the words “Forgot your password?” in the lower right corner (**Figure 34**).



Account Sign In

Email

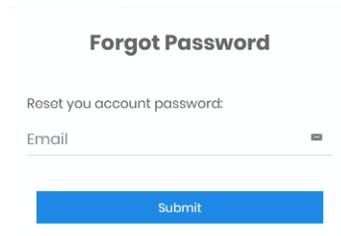
Password

Sign in

Remember me? [Forgot your password?](#)

Figure 34. Account Login Screen

3. You will be redirected to a form to request a password reset. Type the email address associated with your account in the email field and click submit (**Figure 35**).



Forgot Password

Reset your account password:

Email

Submit

Figure 35. Password Reset Screen

4. Once submitted if the email entered matches an account you will receive an email from LMS SYSTEM with a link to complete your password reset request. The password reset email is sent out immediately, so check your inbox for the email. If you do not see the email in your inbox, check your junk/spam folder.
5. To complete your password reset click on the link in the email. The link will expire in 24 hours, so if you do not complete your password reset before then you will have to submit a new password reset request.
6. Your email will prepopulate in the password reset form with the email associated to your account. If you need to change or update this email for any reason, you will need to contact your LMS administrator.
7. You will be asked to enter and confirm a new password. Password requirements are listed below the confirm password field. All password requirements must be met. As each requirement is met, the text will turn green and the item will receive a check mark.
8. Once all requirements are met, click submit to finish activation.
9. You will see a confirmation message and a button to return to the login screen where you can now access your leads using your new password for your account.