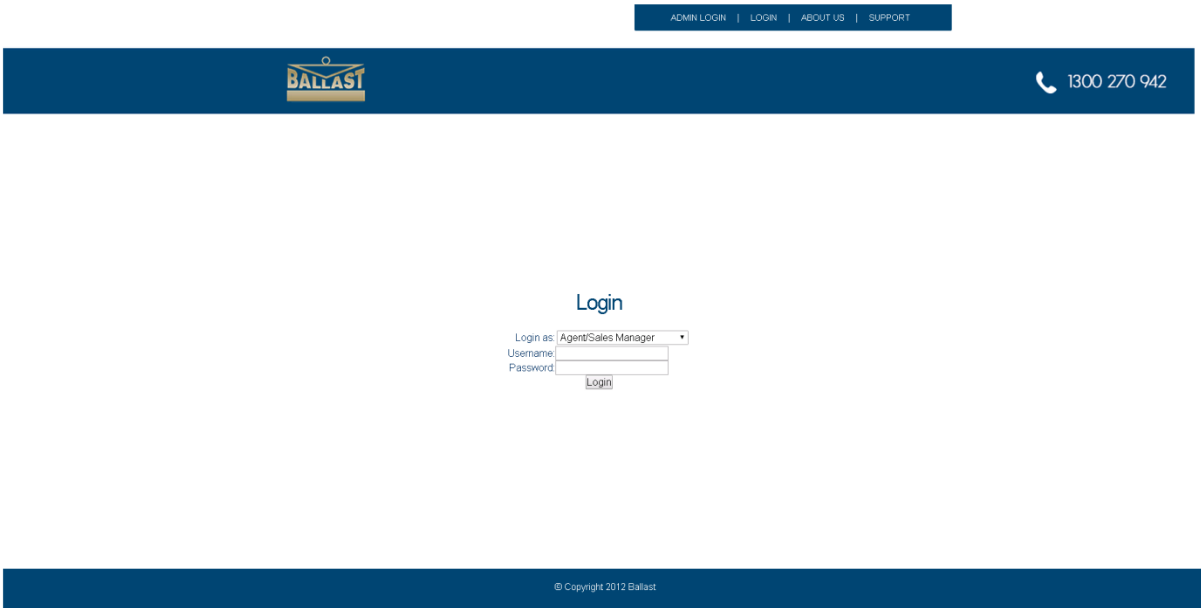
CustomerConnect User Guide

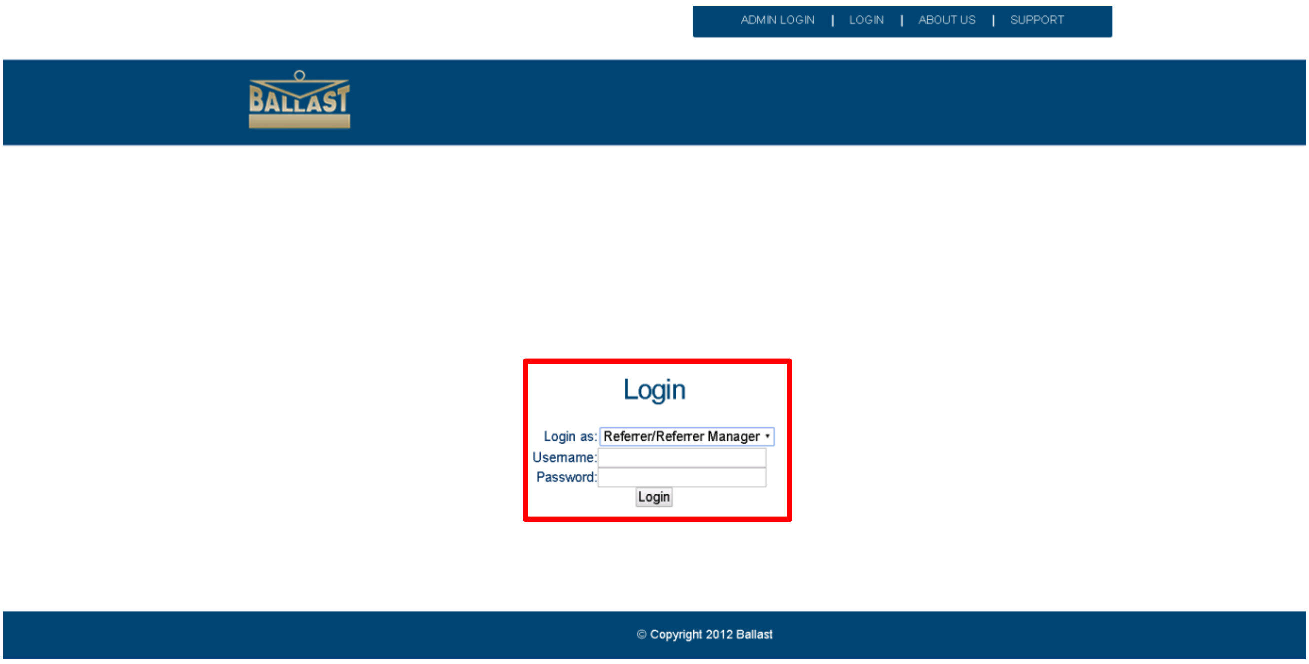
- Referrer/Referrer Manager -

How to Log in

Go to http://www.ballastcustomerconnect.com.au/agentlogin.php

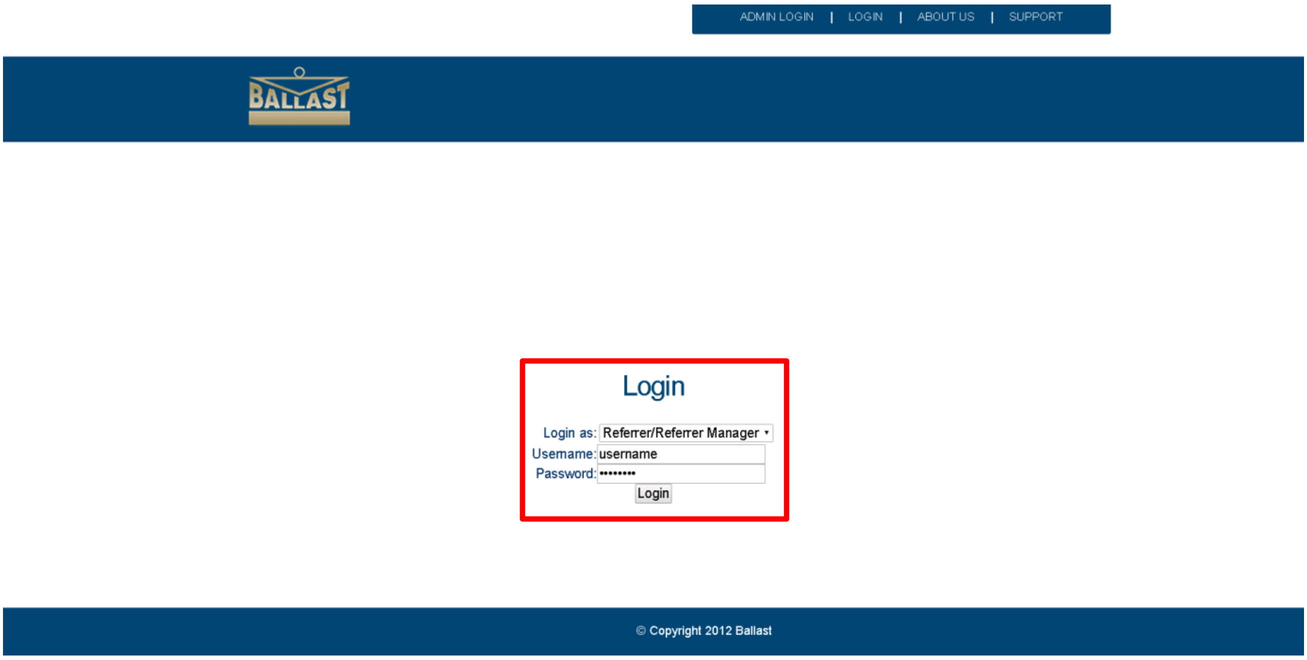


Select *'Referrer/Referrer Manager'* from the *'Login as'* drop-down list.



Enter your Username and Password

Login details are sent via email from the system when the Login is created



For any issues with logging in or login details please email strategicalliances@ballast.com.au

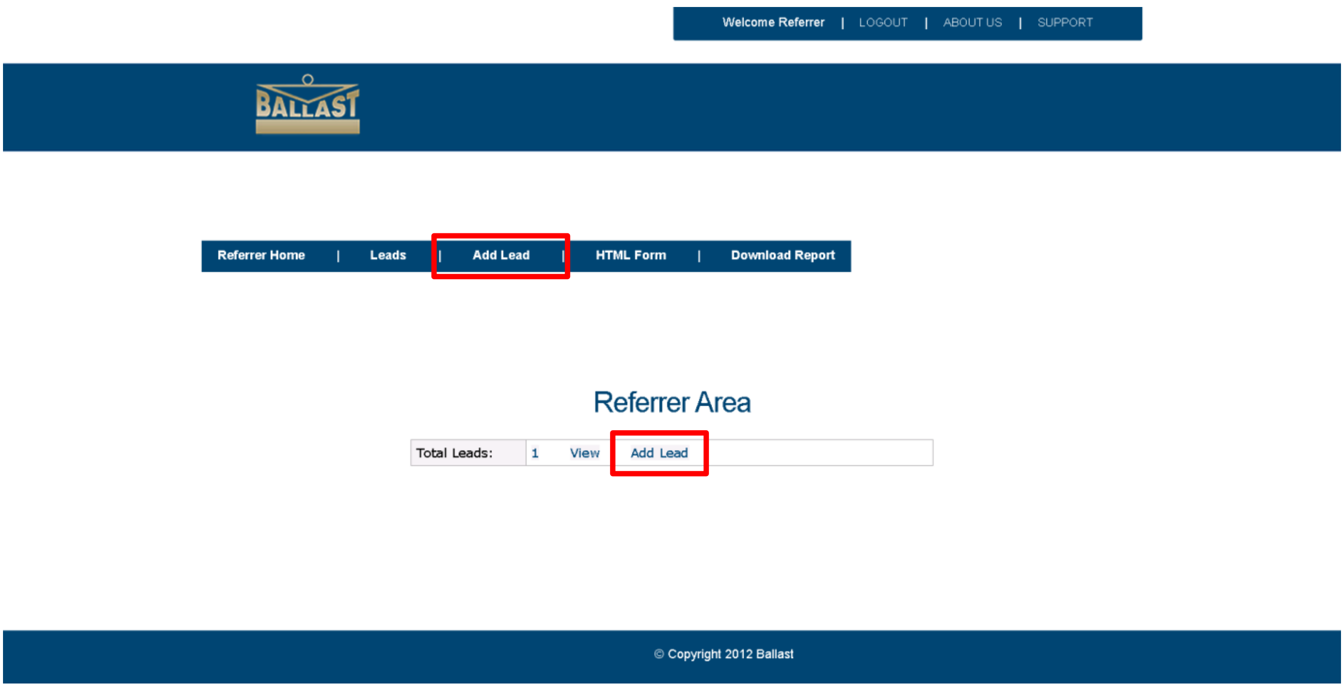
How to Add a lead

To add a lead you must be logged in as a *'Referrer/Referrer Manager'*

The following details are required to submit a lead:

- Full Name
- Email
- Phone Number
- Address
- The Ballast products/services they require
- Permission from the individual/s to provide their details to Ballast

Select 'Add Lead' from the *'Referrer Area'* or the menu item.



Using the form provided enter the details of the lead. Fields marked with (*) are required fields

Select all the lead products that are applicable to the client at the time.

Click *'Save'* when the form is complete and the lead will be submitted and assigned to the appropriate Agent/s.

Add New Lead

First Name *:	
Last Name *:	
Additional First Name:	
Additional Last Name:	
Entity Name:	
Email *:	
Phone *:	Add new phone:
Address1 *:	
Address2:	
Suburb *:	
State *:	SELECT ONE
Postcode *:	
Lead Product *:	**Finance**: Finance **Property**: Property **Financial Management**: Debt Management; Investments; Retirement Planning; Risk Insurance; Wealth Creation **Superannuation Management**: SMSF **Accounting**: Business Services; Tax Return & Audit - Company/Trust; Tax Return & Audit - Personal; Tax Return & Audit - SMSF **CALC**: Compliance and Learning **Legal**: Amendments; Corporate Trust Deeds; Estate Planning; General Legal Advice; Property Acquisition Trust; Super Trust Deeds
Call Time:	SELECT ONE
Call Date:	
Notes:	
Lead References:	First Home Buyer; Investor; Landlord; OFI Buyer; Refinance

Permission has been obtained from the individual/s stated to be contacted in regards to the nature and range of services indicated and for their personal information to be made available to and between the Ballast Group of companies where appropriate.

Save

View and Check the progress of a lead

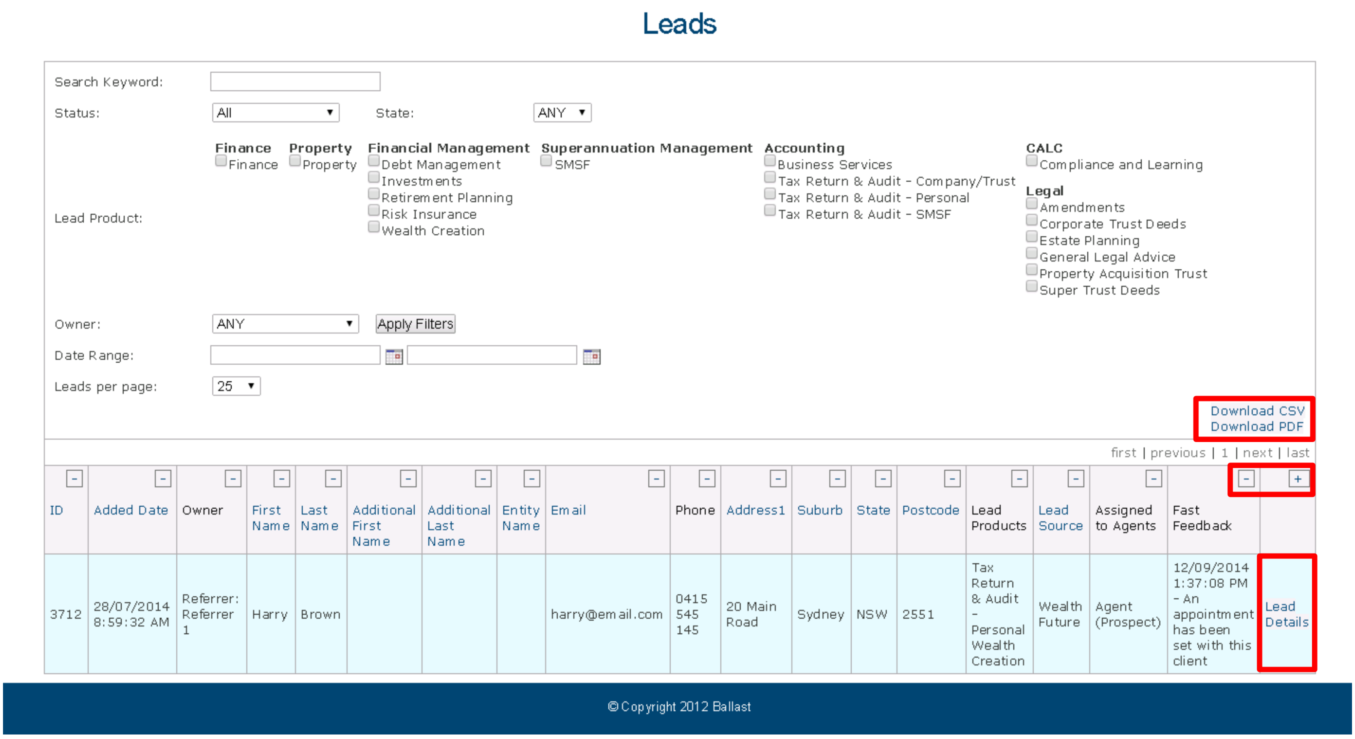
To view a summary of added leads click on the *'Leads'* menu item or the *'View'* link from the *'Referrer Area'*.

The *'Leads'* screen displays all the leads that have been submitted.

From the Leads screen a brief description of what stage the lead is at can be obtained.

CSV and PDF reports can be downloaded from the *'Leads'* screen.

The + and - buttons in the top right of the columns can be used to adjust what columns are displayed.



For more detailed information on what actions have occurred with the lead click on the *'Lead Details'* link.

Lead Details

The *'Lead Details'* area contains 5 tabs

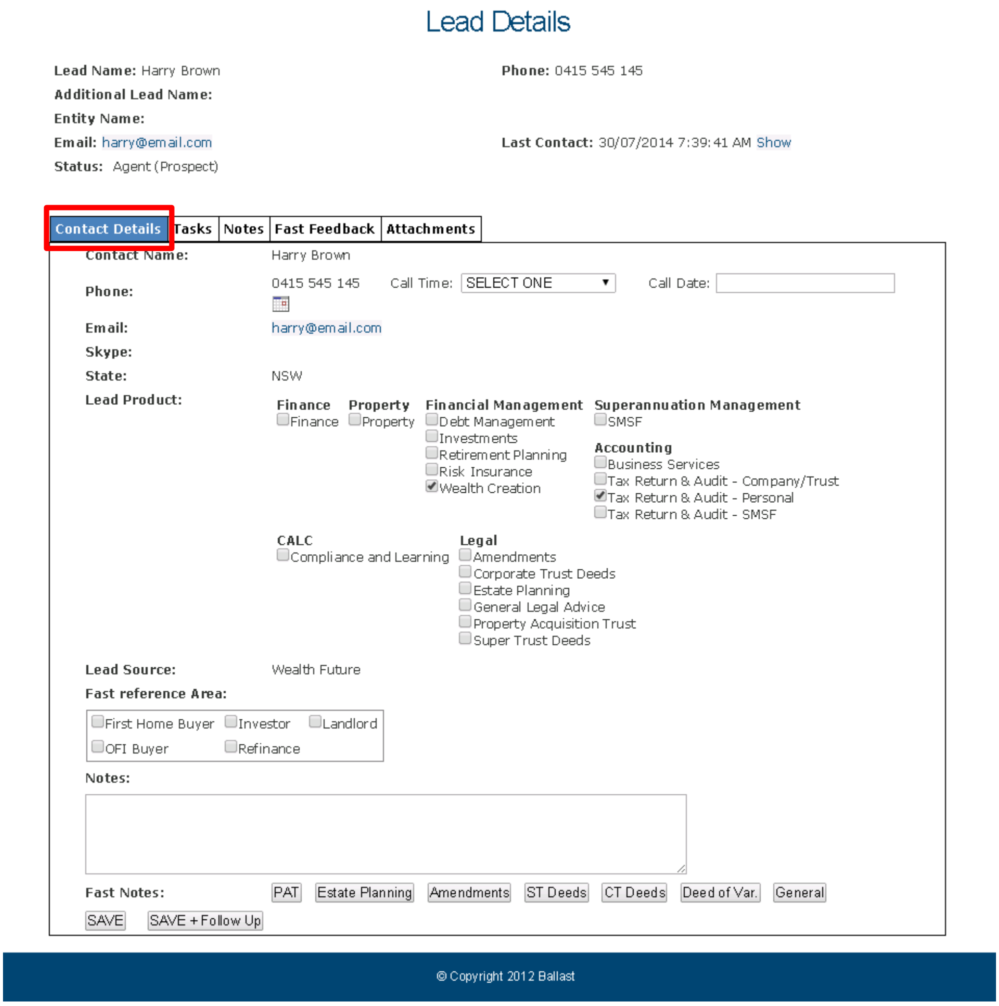
- Contact Details
- Tasks
- Notes
- Fast Feedback
- Attachments

Referrers can browse these tabs to check the progress of a lead.

Contact Details

The *'Contact Details'* tab contains details on the client and the nature of the lead.

Notes are also added from this tab.



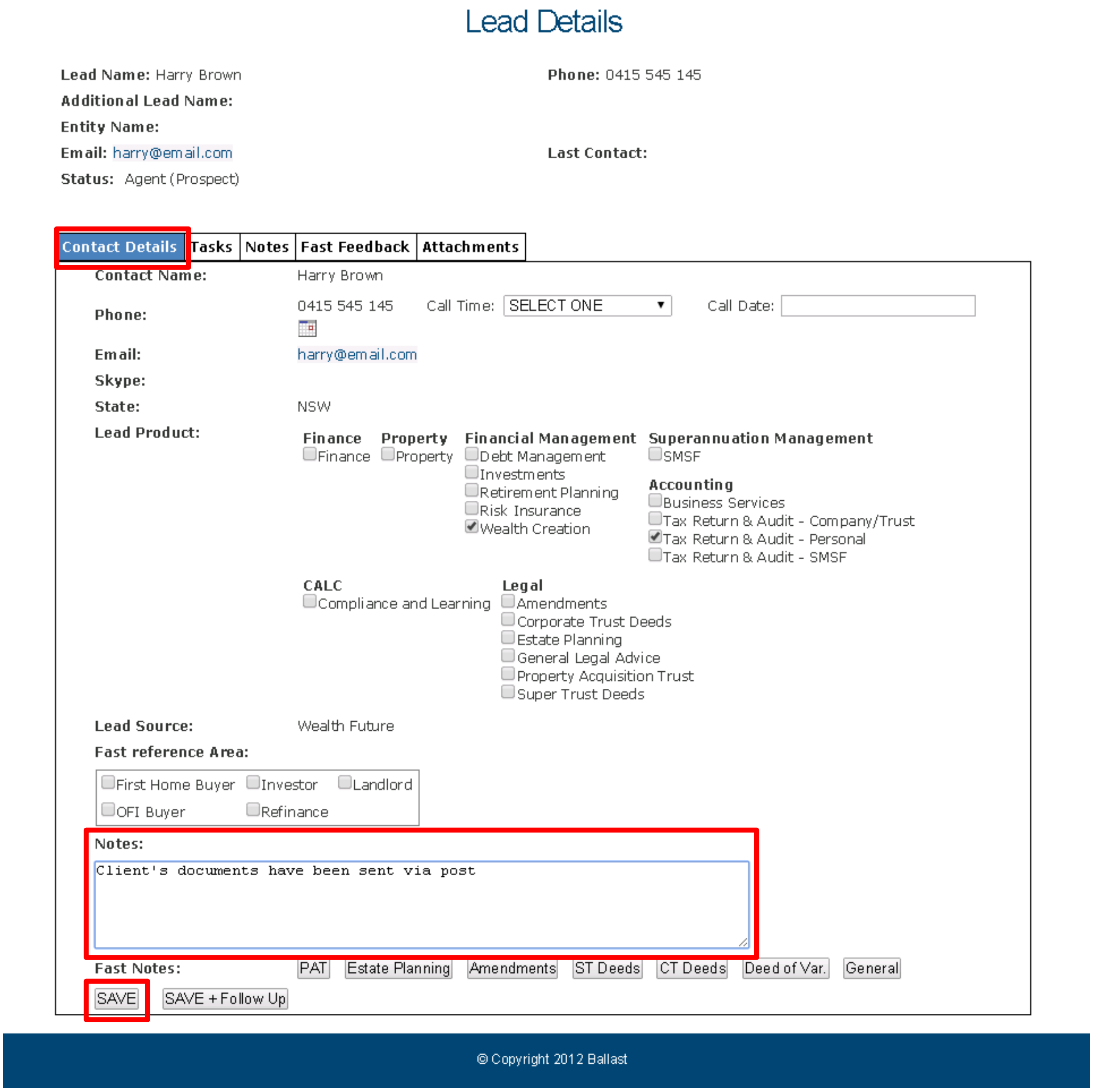
How to add a note

Referrers can add notes to a lead after it has been entered.

Enter the required note in the text box provided.

Click *'Save'* to add the note.

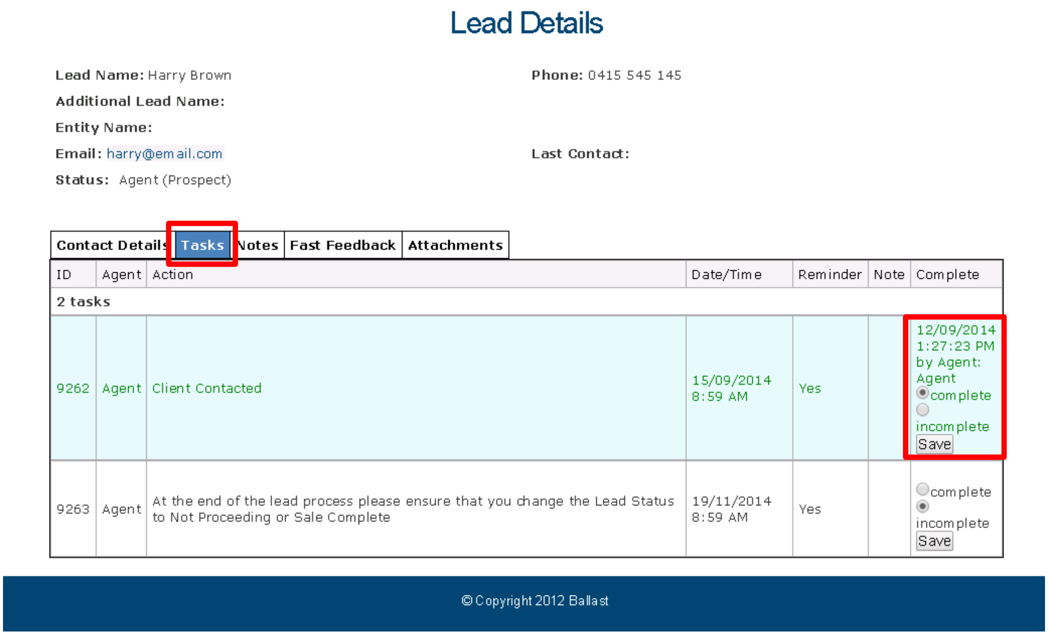
Added notes can be viewed in the *'Notes'* tab.



Tasks

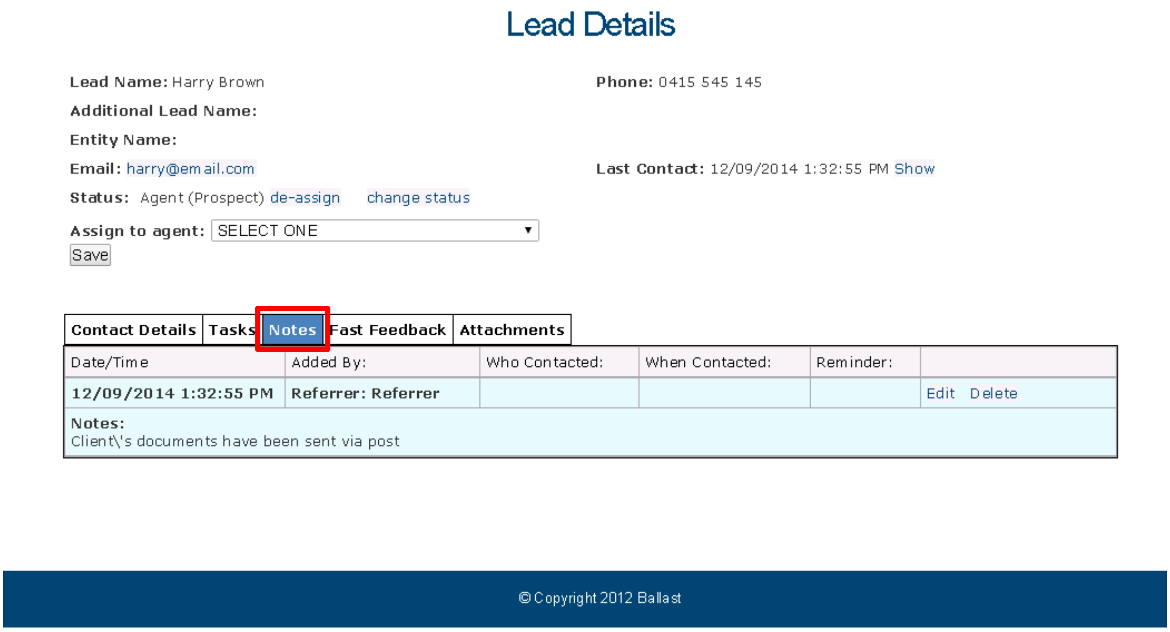
The *'Tasks'* tab displays the tasks required for that lead which will vary depending on the lead product.

Referrers can check which tasks have been completed for the lead.



Notes

The *'Notes'* tab displays all the notes that have been added for the lead.



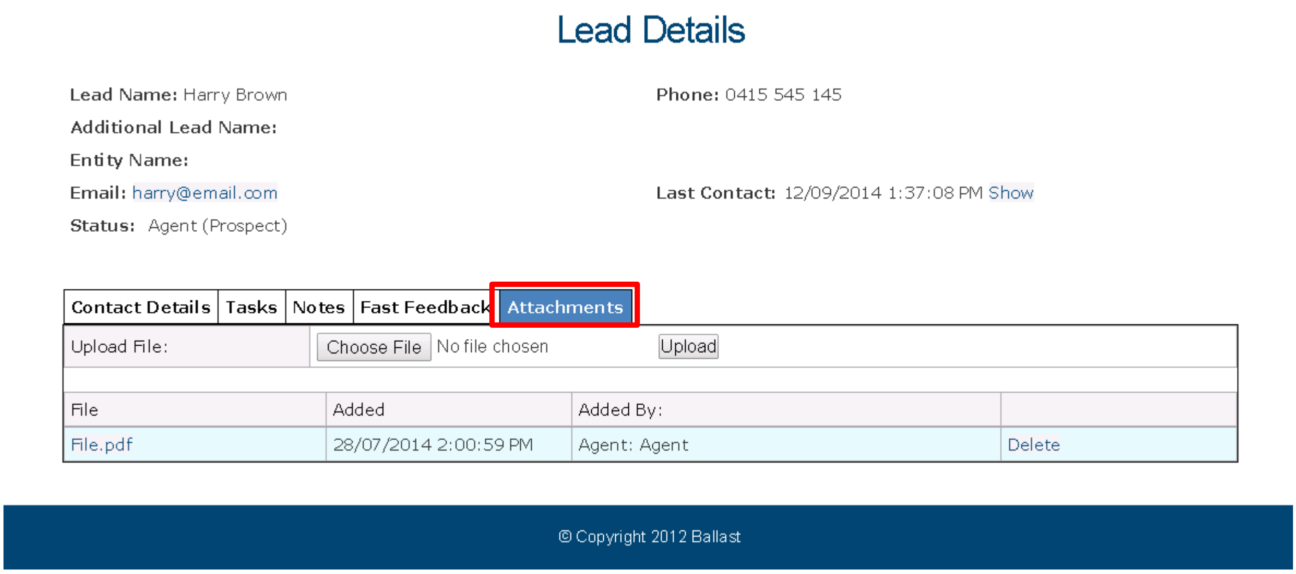
Fast Feedback

The *'Fast Feedback'* tab displays the Fast Feedbacks that have been entered for the lead.

Fast Feedbacks are brief comments indicating what actions have occurred with the lead.

Attachments

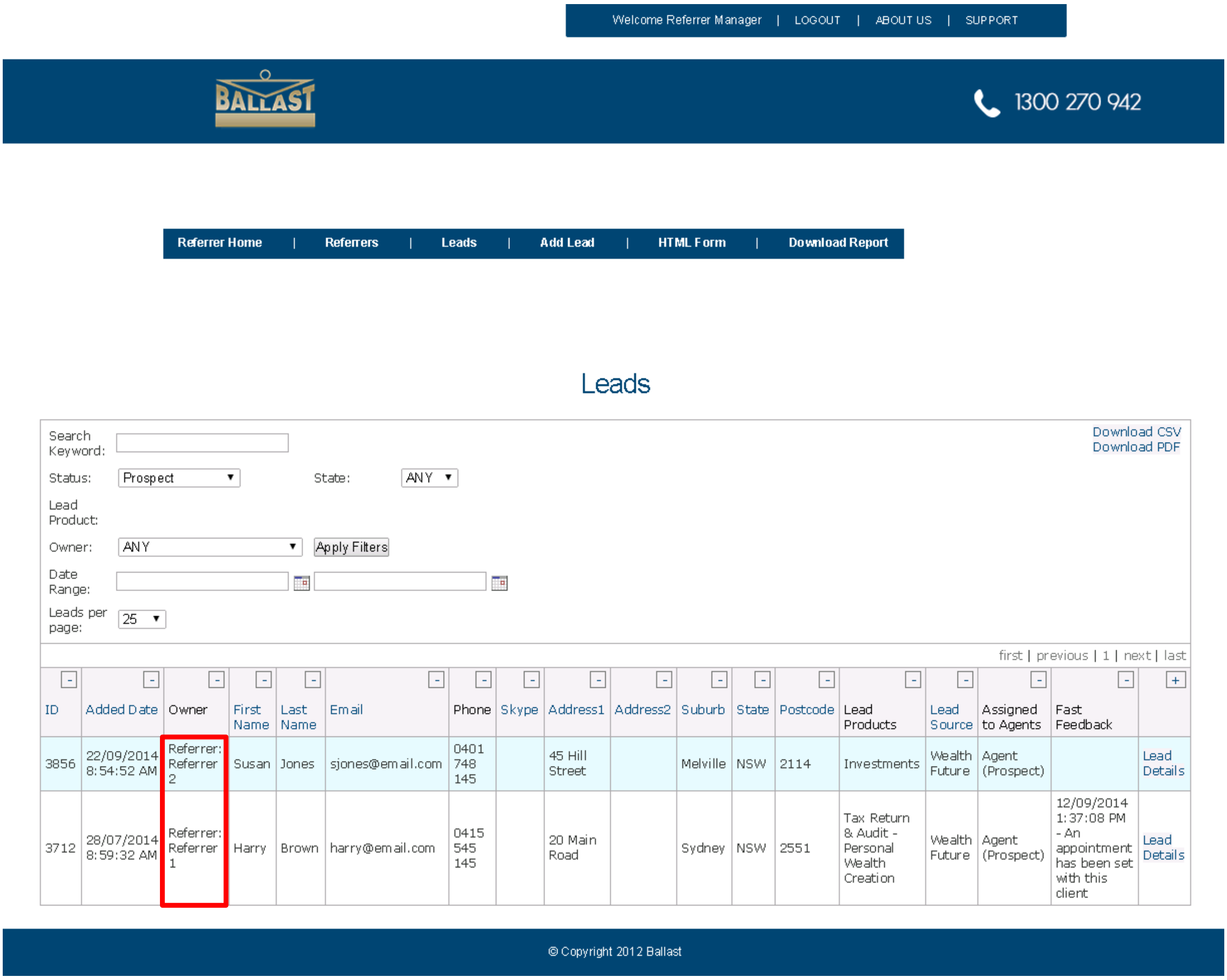
The *'Attachments'* tab is where those connected to the lead can upload and view files.



Referrer Managers

Referrer managers/heads of a referral source can use the system to monitor the referral activity of their organisation/department.

All leads entered by their organisation/department will appear on the *'Leads'* screen and they can use the *'Owner'* filter to display a specific referrer's leads.


Welcome Referrer Manager | LOGOUT | ABOUT US | SUPPORT

BALLAST 1300 270 942

Referrer Home | Referrers | Leads | Add Lead | HTML Form | Download Report

Leads

Search Keyword:
Download CSV
Download PDF
Status: Prospect State: ANY
Lead Product:
Owner: ANY Apply Filters
Date Range:
Leads per page: 25

first | previous | 1 | next | last

ID	Added Date	Owner	First Name	Last Name	Email	Phone	Skype	Address1	Address2	Suburb	State	Postcode	Lead Products	Lead Source	Assigned to Agents	Fast Feedback	
3856	22/09/2014 8:54:52 AM	Referrer: Referrer 2	Susan	Jones	sjones@email.com	0401 748 145		45 Hill Street		Melville	NSW	2114	Investments	Wealth Future	Agent (Prospect)		Lead Details
3712	28/07/2014 8:59:32 AM	Referrer: Referrer 1	Harry	Brown	harry@email.com	0415 545 145		20 Main Road		Sydney	NSW	2551	Tax Return & Audit - Personal Wealth Creation	Wealth Future	Agent (Prospect)	12/09/2014 1:37:08 PM - An appointment has been set with this client	Lead Details

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CustomerConnect for Referrers

From the information contained in this user guide referrers should be able to conduct the following in CustomerConnect:

- Login to CustomerConnect
- Add leads
- View and track the progress of added leads
- Monitor referral activity (Referrer Managers)

CustomerConnect will also assist Ballast in the processing of commissions as the referrer of the client is able to be easily identified.

For any assistance with CustomerConnect please contact Elaine on (03) 8888 6000 or email strategicalliances@ballast.com.au