



CustomerConnect User Guide

- Referrer/Referrer Manager -

How to Log in	1 - 2
How to add a lead	3 - 4
View and check the progress of a lead	5 - 10

How to Log in

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



Login

Login as: Agent/Sales Manager ▾

Username:

Password:



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



Login

Login as: Referrer/Referrer Manager ▾

Username:

Password:



Enter your Username and Password

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

[ADMIN LOGIN](#) | [LOGIN](#) | [ABOUT US](#) | [SUPPORT](#)



Login

Login as: Referrer/Referrer Manager ▾

Username: username

Password: *****

© Copyright 2012 Ballast

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

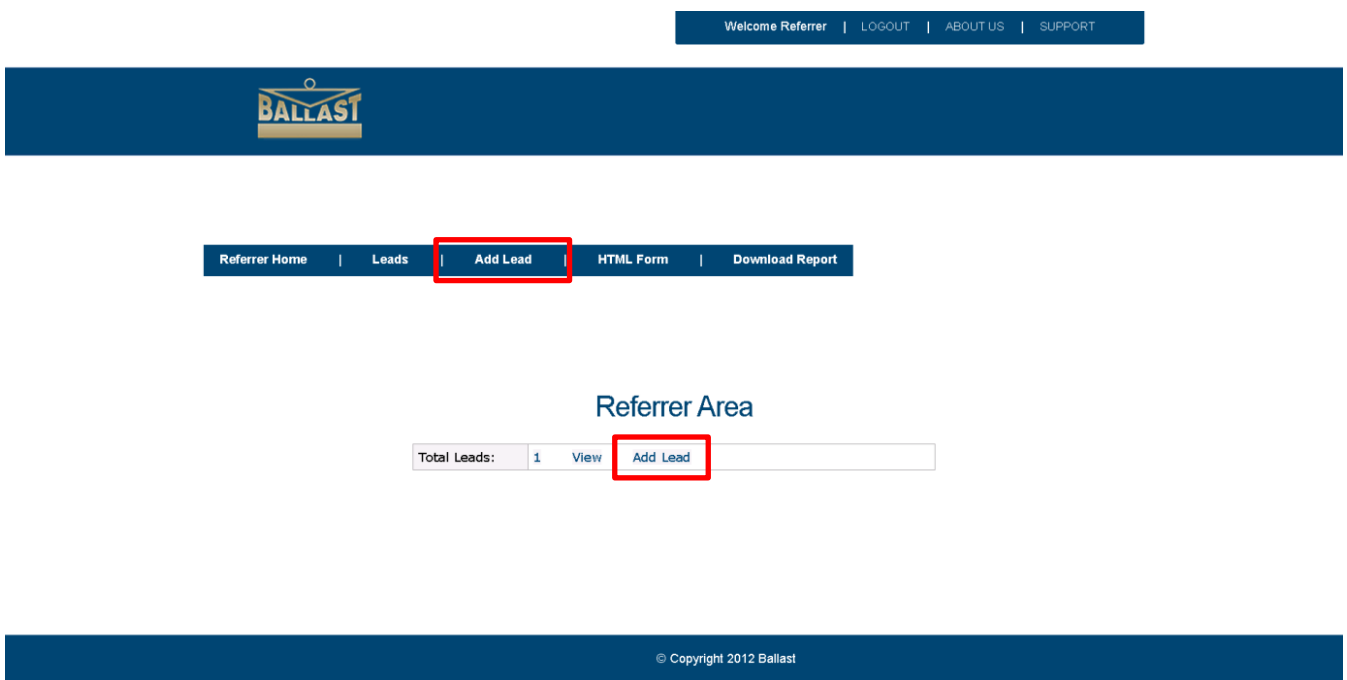
How to Add a lead

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 *	<input type="text"/>																																																						
Last Name *	<input type="text"/>																																																						
Additional First Name:	<input type="text"/>																																																						
Additional Last Name:	<input type="text"/>																																																						
Entity Name:	<input type="text"/>																																																						
Email *	<input type="text"/>																																																						
Phone *	Add new phone: <input type="text"/>																																																						
Address1 *	<input type="text"/>																																																						
Address2:	<input type="text"/>																																																						
Suburb *	<input type="text"/>																																																						
State *	SELECT ONE ▾																																																						
Postcode *	<input type="text"/>																																																						
Lead Product *	<table border="0"> <tr> <td>Finance</td> <td>Property</td> <td>Financial Management</td> </tr> <tr> <td><input type="checkbox"/> Finance</td> <td><input type="checkbox"/> Property</td> <td><input type="checkbox"/> Debt Management</td> </tr> <tr> <td></td> <td></td> <td><input type="checkbox"/> Investments</td> </tr> <tr> <td></td> <td></td> <td><input type="checkbox"/> Retirement Planning</td> </tr> <tr> <td></td> <td></td> <td><input type="checkbox"/> Risk Insurance</td> </tr> <tr> <td></td> <td></td> <td><input type="checkbox"/> Wealth Creation</td> </tr> <tr> <td>Superannuation Management</td> <td>Accounting</td> <td></td> </tr> <tr> <td><input type="checkbox"/> SMSF</td> <td><input type="checkbox"/> Business Services</td> <td></td> </tr> <tr> <td></td> <td><input type="checkbox"/> Tax Return & Audit - Company/Trust</td> <td></td> </tr> <tr> <td></td> <td><input type="checkbox"/> Tax Return & Audit - Personal</td> <td></td> </tr> <tr> <td></td> <td><input type="checkbox"/> Tax Return & Audit - SMSF</td> <td></td> </tr> <tr> <td>CALC</td> <td>Legal</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Compliance and Learning</td> <td><input type="checkbox"/> Amendments</td> <td></td> </tr> <tr> <td></td> <td><input type="checkbox"/> Corporate Trust Deeds</td> <td></td> </tr> <tr> <td></td> <td><input type="checkbox"/> Estate Planning</td> <td></td> </tr> <tr> <td></td> <td><input type="checkbox"/> General Legal Advice</td> <td></td> </tr> <tr> <td></td> <td><input type="checkbox"/> Property Acquisition Trust</td> <td></td> </tr> <tr> <td></td> <td><input type="checkbox"/> Super Trust Deeds</td> <td></td> </tr> </table>	Finance	Property	Financial Management	<input type="checkbox"/> Finance	<input type="checkbox"/> Property	<input type="checkbox"/> Debt Management			<input type="checkbox"/> Investments			<input type="checkbox"/> Retirement Planning			<input type="checkbox"/> Risk Insurance			<input type="checkbox"/> Wealth Creation	Superannuation Management	Accounting		<input type="checkbox"/> SMSF	<input type="checkbox"/> Business Services			<input type="checkbox"/> Tax Return & Audit - Company/Trust			<input type="checkbox"/> Tax Return & Audit - Personal			<input type="checkbox"/> Tax Return & Audit - SMSF		CALC	Legal		<input type="checkbox"/> Compliance and Learning	<input type="checkbox"/> Amendments			<input type="checkbox"/> Corporate Trust Deeds			<input type="checkbox"/> Estate Planning			<input type="checkbox"/> General Legal Advice			<input type="checkbox"/> Property Acquisition Trust			<input type="checkbox"/> Super Trust Deeds	
Finance	Property	Financial Management																																																					
<input type="checkbox"/> Finance	<input type="checkbox"/> Property	<input type="checkbox"/> Debt Management																																																					
		<input type="checkbox"/> Investments																																																					
		<input type="checkbox"/> Retirement Planning																																																					
		<input type="checkbox"/> Risk Insurance																																																					
		<input type="checkbox"/> Wealth Creation																																																					
Superannuation Management	Accounting																																																						
<input type="checkbox"/> SMSF	<input type="checkbox"/> Business Services																																																						
	<input type="checkbox"/> Tax Return & Audit - Company/Trust																																																						
	<input type="checkbox"/> Tax Return & Audit - Personal																																																						
	<input type="checkbox"/> Tax Return & Audit - SMSF																																																						
CALC	Legal																																																						
<input type="checkbox"/> Compliance and Learning	<input type="checkbox"/> Amendments																																																						
	<input type="checkbox"/> Corporate Trust Deeds																																																						
	<input type="checkbox"/> Estate Planning																																																						
	<input type="checkbox"/> General Legal Advice																																																						
	<input type="checkbox"/> Property Acquisition Trust																																																						
	<input type="checkbox"/> Super Trust Deeds																																																						
Call Time:	SELECT ONE ▾																																																						
Call Date:	<input type="text"/> 																																																						
Notes:	<div style="border: 1px solid #ccc; height: 40px;"></div>																																																						
Lead References:	<table border="0"> <tr> <td><input type="checkbox"/> First Home Buyer</td> <td><input type="checkbox"/> Investor</td> <td><input type="checkbox"/> Landlord</td> </tr> <tr> <td><input type="checkbox"/> OFI Buyer</td> <td><input type="checkbox"/> Refinance</td> <td></td> </tr> </table>	<input type="checkbox"/> First Home Buyer	<input type="checkbox"/> Investor	<input type="checkbox"/> Landlord	<input type="checkbox"/> OFI Buyer	<input type="checkbox"/> Refinance																																																	
<input type="checkbox"/> First Home Buyer	<input type="checkbox"/> Investor	<input type="checkbox"/> Landlord																																																					
<input type="checkbox"/> OFI Buyer	<input type="checkbox"/> Refinance																																																						
<input type="checkbox"/> 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.																																																							
<input type="button" value="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.

The screenshot shows the 'Leads' screen interface. At the top, a navigation bar contains 'Referrer Home', 'Leads' (highlighted with a red box), 'Add Lead', 'HTML Form', and 'Download Report'. Below this is the 'Leads' title and a search area with a 'Search Keyword' field, 'Status' dropdown (set to 'All'), and 'State' dropdown (set to 'ANY'). There are several filter sections: 'Lead Product' with checkboxes for Finance, Property, Financial Management, Superannuation Management, Accounting, and CALC; 'Owner' with a dropdown set to 'ANY' and an 'Apply Filters' button; and 'Date Range' with two date input fields. A 'Leads per page' dropdown is set to '25'. In the top right corner, there are 'Download CSV' and 'Download PDF' buttons (both highlighted with red boxes). Below the filters is a table of leads. The table has columns for ID, Added Date, Owner, First Name, Last Name, Additional First Name, Additional Last Name, Entity Name, Email, Phone, Address1, Suburb, State, Postcode, Lead Products, Lead Source, Assigned to Agents, and Fast Feedback. The first row of data shows ID 3712, Added Date 28/07/2014 8:59:32 AM, Owner Referrer: Referrer 1, First Name Harry, Last Name Brown, Email harry@email.com, Phone 0415 545 145, Address1 20 Main Road, Suburb Sydney, State NSW, Postcode 2551, Lead Products Tax Return & Audit - Personal Wealth Creation, Lead Source Wealth Future, Assigned to Agents Agent (Prospect), and Fast Feedback 12/09/2014 1:37:08 PM - An appointment has been set with this client. A 'Lead Details' link is visible at the end of the row (highlighted with a red box). At the bottom of the page, there is a copyright notice: '© Copyright 2012 Ballast'.

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.

Lead Details

Lead Name: Harry Brown Phone: 0415 545 145
Additional Lead Name:
Entity Name:
Email: harry@email.com Last Contact: 30/07/2014 7:39:41 AM [Show](#)
Status: Agent (Prospect)

Contact Details	Tasks	Notes	Fast Feedback	Attachments
Contact Name: Harry Brown				
Phone:	0415 545 145	Call Time: SELECT ONE	Call Date: <input type="text"/>	
Email:	harry@email.com			
Skype:				
State:	NSW			
Lead Product:	Finance <input type="checkbox"/> Finance	Property <input type="checkbox"/> Property	Financial Management <input type="checkbox"/> Debt Management <input type="checkbox"/> Investments <input type="checkbox"/> Retirement Planning <input type="checkbox"/> Risk Insurance <input checked="" type="checkbox"/> Wealth Creation	Superannuation Management <input type="checkbox"/> SMSF Accounting <input type="checkbox"/> Business Services <input type="checkbox"/> Tax: Return & Audit - Company/Trust <input checked="" type="checkbox"/> Tax: Return & Audit - Personal <input type="checkbox"/> Tax: Return & Audit - SMSF
	CALC <input type="checkbox"/> Compliance and Learning		Legal <input type="checkbox"/> Amendments <input type="checkbox"/> Corporate Trust Deeds <input type="checkbox"/> Estate Planning <input type="checkbox"/> General Legal Advice <input type="checkbox"/> Property Acquisition Trust <input type="checkbox"/> Super Trust Deeds	
Lead Source:	Wealth Future			
Fast reference Area:	<input type="checkbox"/> First Home Buyer <input type="checkbox"/> Investor <input type="checkbox"/> Landlord <input type="checkbox"/> OFI Buyer <input type="checkbox"/> Refinance			
Notes:	<input type="text"/>			
Fast Notes:	<input type="button" value="PAT"/> <input type="button" value="Estate Planning"/> <input type="button" value="Amendments"/> <input type="button" value="ST Deeds"/> <input type="button" value="CT Deeds"/> <input type="button" value="Deed of Var."/> <input type="button" value="General"/>			
	<input type="button" value="SAVE"/> <input type="button" value="SAVE + Follow Up"/>			

© Copyright 2012 Ballast

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.

Lead Details

Lead Name: Harry Brown **Phone:** 0415 545 145
Additional Lead Name:
Entity Name:
Email: harry@email.com **Last Contact:**
Status: Agent (Prospect)

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

Contact Name: Harry Brown

Phone: 0415 545 145 Call Time: Call Date:

Email: harry@email.com

Skype:

State: NSW

Lead Product:

<input type="checkbox"/> Finance	<input type="checkbox"/> Property	<input type="checkbox"/> Debt Management	<input type="checkbox"/> SMSF
		<input type="checkbox"/> Investments	
		<input type="checkbox"/> Retirement Planning	Accounting
		<input type="checkbox"/> Risk Insurance	<input type="checkbox"/> Business Services
		<input checked="" type="checkbox"/> Wealth Creation	<input checked="" type="checkbox"/> Tax Return & Audit - Company/Trust
			<input checked="" type="checkbox"/> Tax Return & Audit - Personal
			<input type="checkbox"/> Tax Return & Audit - SMSF

CALC
 Compliance and Learning

Legal
 Amendments
 Corporate Trust Deeds
 Estate Planning
 General Legal Advice
 Property Acquisition Trust
 Super Trust Deeds

Lead Source: Wealth Future

Fast reference Area:

<input type="checkbox"/> First Home Buyer	<input type="checkbox"/> Investor	<input type="checkbox"/> Landlord
<input type="checkbox"/> OFI Buyer	<input type="checkbox"/> Refinance	

Notes:

Client's documents have been sent via post

Fast Notes:

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.

Lead Details

Lead Name: Harry Brown Phone: 0415 545 145
 Additional Lead Name:
 Entity Name:
 Email: harry@email.com Last Contact:
 Status: Agent (Prospect)

Contact Details		Tasks	Notes	Fast Feedback	Attachments	
ID	Agent	Action	Date/Time	Reminder	Note	Complete
2 tasks						
9262	Agent	Client Contacted	15/09/2014 8:59 AM	Yes		<input type="radio"/> 12/09/2014 1:27:23 PM by Agent: Agent <input checked="" type="radio"/> complete <input type="radio"/> incomplete <input type="button" value="Save"/>
9263	Agent	At the end of the lead process please ensure that you change the Lead Status to Not Proceeding or Sale Complete	19/11/2014 8:59 AM	Yes		<input type="radio"/> complete <input checked="" type="radio"/> incomplete <input type="button" value="Save"/>

© Copyright 2012 Ballast

Notes

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

Lead Details

Lead Name: Harry Brown Phone: 0415 545 145
 Additional Lead Name:
 Entity Name:
 Email: harry@email.com Last Contact: 12/09/2014 1:32:55 PM [Show](#)
 Status: Agent (Prospect) [de-assign](#) [change status](#)
 Assign to agent:

Contact Details		Tasks	Notes	Fast Feedback	Attachments
Date/Time	Added By:	Who Contacted:	When Contacted:	Reminder:	
12/09/2014 1:32:55 PM	Referrer: Referrer				Edit Delete
Notes: Client's documents have been sent via post					

© Copyright 2012 Ballast

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.

Lead Details

Lead Name: Harry Brown
Additional Lead Name:
Entity Name:
Email: harry@email.com
Status: Agent (Prospect)

Phone: 0415 545 145

Last Contact: 12/09/2014 1:37:08 PM [Show](#)

Contact Details	Tasks	Notes	Fast Feedback	Attachments
Date/Time		Added By:		Notes:
12/09/2014 1:36:25 PM		Agent: Agent		I have spoken with the client on the phone
12/09/2014 1:37:08 PM		Agent: Agent		An appointment has been set with this client

© Copyright 2012 Ballast

Attachments

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

Lead Details

Lead Name: Harry Brown
Additional Lead Name:
Entity Name:
Email: harry@email.com
Status: Agent (Prospect)

Phone: 0415 545 145

Last Contact: 12/09/2014 1:37:08 PM [Show](#)

Contact Details	Tasks	Notes	Fast Feedback	Attachments
Upload File:	<input type="button" value="Choose File"/>	No file chosen	<input type="button" value="Upload"/>	
File	Added	Added By:		
File.pdf	28/07/2014 2:00:59 PM	Agent: Agent		Delete

© Copyright 2012 Ballast

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



1300 270 942

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

Leads

Search Keyword:

Status: State:

Lead Product:

Owner: [Apply Filters](#)

Date Range: -

Leads per page:

[Download CSV](#)
[Download PDF](#)

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

first | previous | 1 | next | last

© Copyright 2012 Ballast

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