

boberdoo.com

INTRODUCTION

MANUAL



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GREETINGS FROM boberdoo.com

This manual will serve as an overview of the boberdoo system. In this report we will discuss sources, partners, leads, vendors, tickets, reports, and more. We hope this can serve as a manual to answer any basic questions you might have about the boberdoo system. If you would like to get a more in depth look at how our system operates, check out our website.



BASIC SYSTEM OVERVIEW

If you are new to the boberdoo system or simply looking for a quick refresher on its basic functionality, watch our brief intro videos below.

Part 1 - Introduction And Defining Marketing Activity

The first of our four-part video series shows how your customized lead types are integrated into your system.

Part 2 - Tracking and Segmenting Leads

The second part of our video series shows how Vendors and Sources are used in the system, found under the Settings tab. Definitions of our many source settings can be found **here**.

Part 3 - Distributing Leads

This video goes over the Partners and Leads tabs, showing how leads are distributed through the system and ultimately sold.

Part 4 - Reporting and Lead Tools

Our final video shows off a few of the bells and whistles in the system through our Refunds and Reports tabs, including how to automate Timed Reports, our Forms Manager, and our Notification Manager.



PARTNERS

Partners, also known as lead buyers, clients, or agents, are where your leads will eventually be sold. In order to function in your system, each partner has three requirements:

The partner must be active

The partner must have funds in the account

The partner must have filter sets

Filter sets are the custom business rules that define what leads a partner is allowed to purchase, how much they cost, and many more custom options. Filter sets are the most important part of the boberdoo system, ensuring that each lead is going to the right buyers for the right price. Filter sets apply to both web and phone leads. As with most of our system, partner settings and filter sets are highly customizable to fit your specific needs. Each partner can be assigned their own limited log-ins to your system.

For more information on the Partners tab, watch these short videos:



Creating a New Partner



Filter Sets



Manage Partner Admin



Invoicing/Billing

SOURCES

In your boberdoo system, sources tell you not only where the lead is coming from, but also what actions to take after the lead enters the system. Each source has a wide assortment of customizable options, including vendor assignment, vendor premium margins, Ping Post capability, LeadQC capability, and many more, all of which are defined **here**. Lead buyers identify sources by name, which allows leads to route from a source to a partner with ease.



[Sources Overview](#)

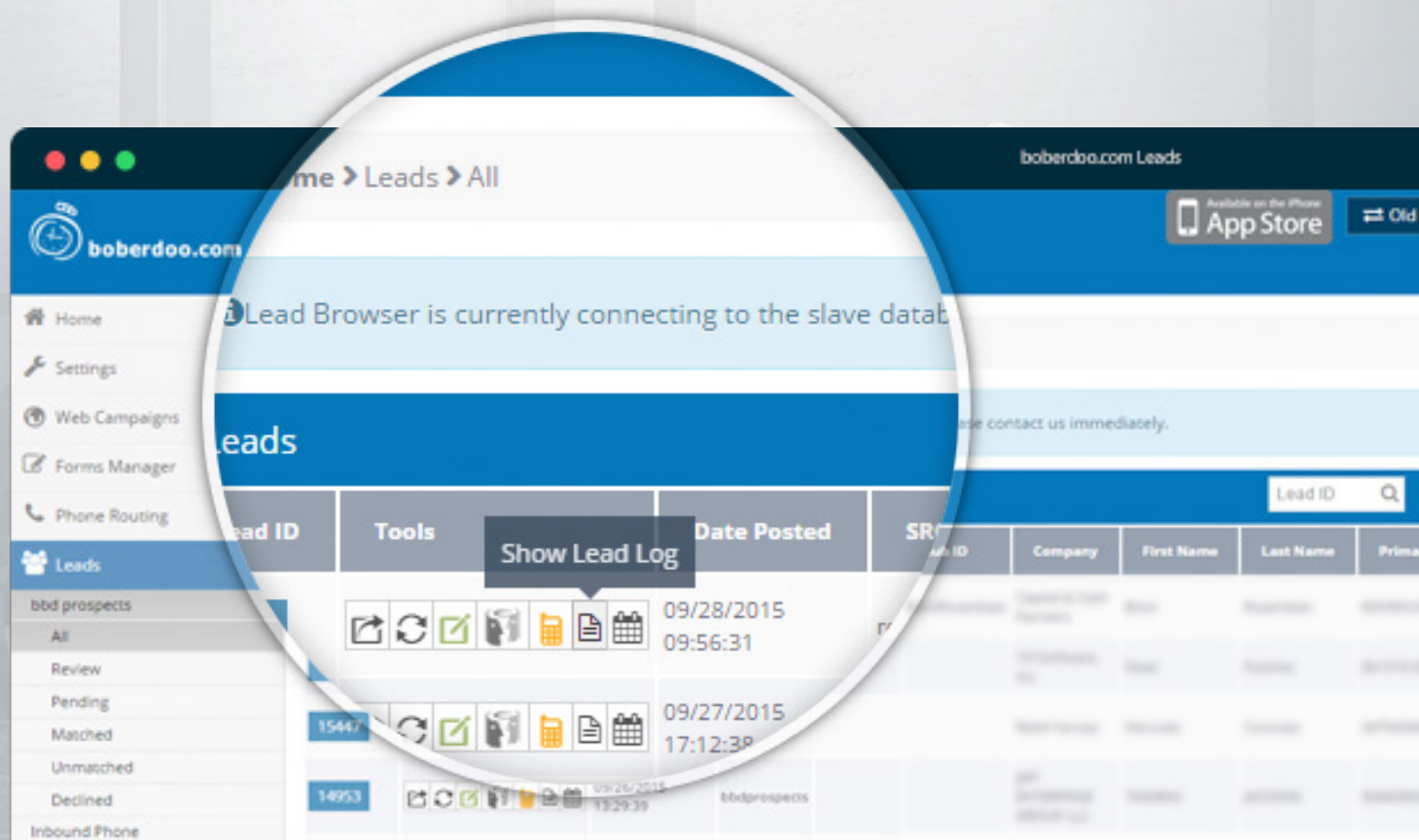
LEADS

The Leads tab is where each section - the vendors, the sources, the partners, and the filter sets - come together. The Leads tab shows where leads came from, who they get routed to, and whether they match the filter sets or have gone unmatched (and unsold). This applies to both web and phone leads. All phone leads are stored in this tab with recordings for call quality purposes.

LEAD LOGS

All of this data is presented in Lead Logs, which show exactly what path a lead has taken through the system. So if you are wondering what happened with a particular lead, the lead log will tell you exactly what happened and why. Lead Logs are accessible via the small black page button under the Tools heading, and are read from the bottom up, identifying each stage of the lead's life that warranted a response. A lead log can be anywhere from a few to dozens of lines long, depending on whether there were errors, multiple buyers, or other similar factors. Primarily, lead logs are used to track Ping Post leads, but they also work well for traditional web leads and calls. If you are having troubles interpreting your lead logs, check out our **lead logs guide**.

Lead Logs can also be sent to other partners in a spreadsheet format. To do this, go to the Tools/Logs tab, find your lead type under the Lead Logs section, and click the "Export to CSV" button on the top right. The .csv file is then downloaded to your computer to be edited and sent out.



LEADQC

To ensure that all leads coming into the system live up to your standards, boberdoo has a built in quality checking system that can be activated for a small pay-per-lead fee. LeadQC cross-references each lead against 30 databases, including the U.S. Census, to make sure that any low scoring leads are held for manual review instead of being sold in real-time. This is enabled on a source-by-source basis that you can turn on and off at your discretion.

For more information on the Leads tab, watch these short videos:



Lead QC



Exporting Leads



Leads Page Tools



PING POST

Ping Post is a staple of the boberdoo system and an increasingly important part of the lead generation business. Ping Post systems send partial information to prospective buyers, who then decide whether they would purchase the rest of it. Interested parties then bid on the lead, and the highest bidder walks away with the lead.

For each partner, bidding can be the same price every time (static bidding) or can vary based on other offers, lead info, and more (dynamic bidding). boberdoo uses some of the most advanced Ping Post technology available today, ensuring smooth and cost-effective buying and selling.

For more information on Ping Post, check out our extensive support library:



[Selling Ping Post Leads](#)



[Buying Ping Post Leads](#)



[Dynamic Bidding](#)



[Ping Post Margins](#)



[Ping Post Specifications](#)

PHONE ROUTING

Through our Phone Routing tab, setting up phone campaigns and managing your numbers is simple. In the boberdoo system, calls are routed through the same distribution logic as web leads, giving you the flexibility to filter and sell calls based on your exact preferences.

Inbound IVR

boberdoo's system has an advanced Integrated Voice Response program built into its call routing capabilities, allowing you to set up menus for your calling customers. These menus automatically route the lead based on the options they select on the phone, saving you the hassle of dealing with it by hand. Inbound IVR is one of our most widely used features, and can make or break the more complicated lead verticals.

Take a look at our phone campaign tutorial for more information:



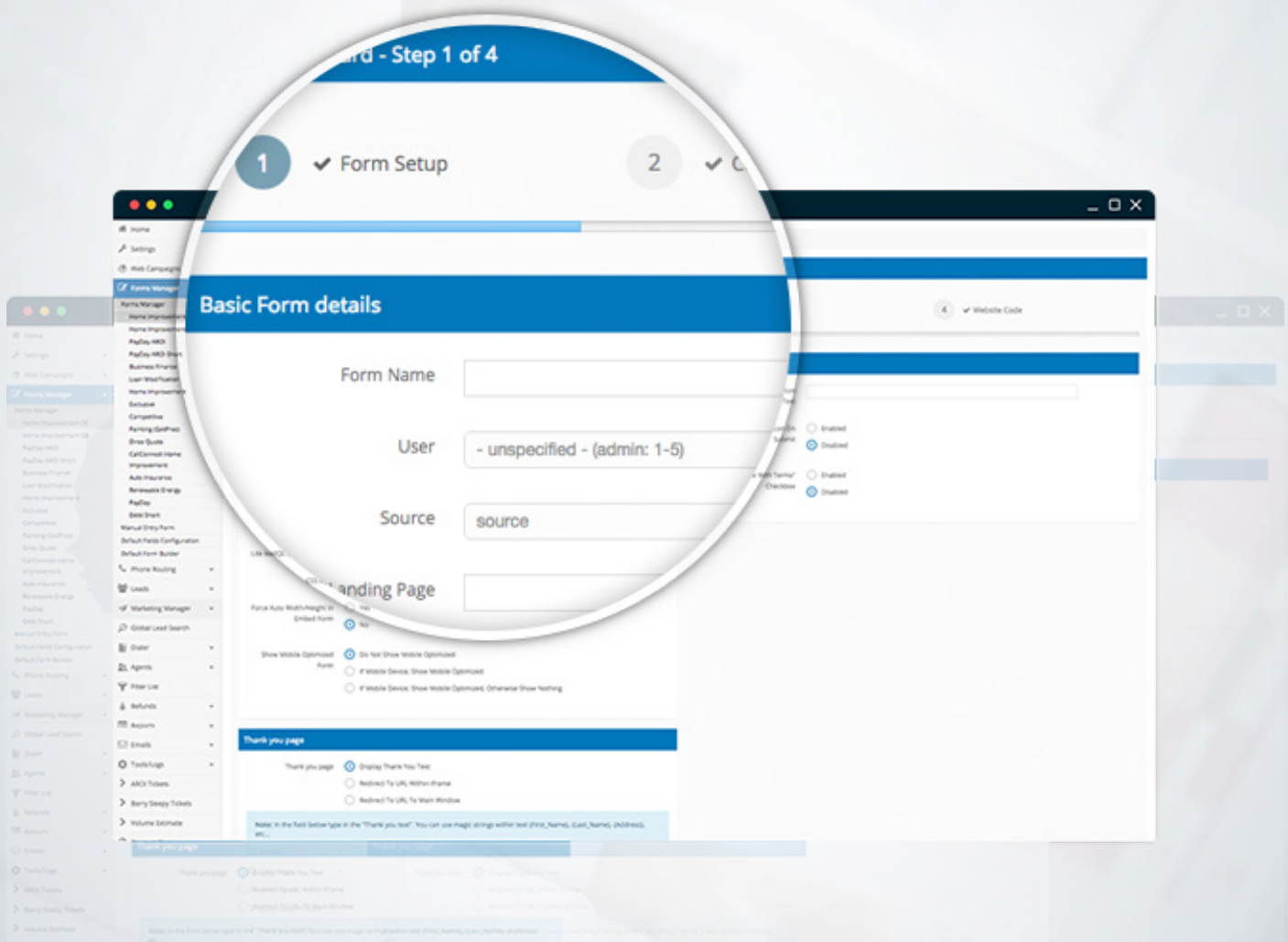
[Setting up a Phone Campaign](#)

Outbound IVR

By request, the boberdoo system can be outfitted with a fully integrated outbound IVR system. Activated at the SRC level, outbound calls are only sent out during a specified time of day. Outbound IVR calls are then sent back to the system as inbound calls once all questions from the IVR have been answered by the recipient.

FORMS MANAGER

The Forms Manager is a useful tool both for testing and generating leads. This utility uses easily customizable CSS to create forms that can be copied and pasted directly onto webpages. Once the form code is placed on your webpage, any changes on the back end will automatically update your form, which allows for simple edits and A/B testing.



For more information on the Leads tab, watch these short videos:



Form Builder Video Series

REPORTS

Reports are used in the boberdoo system to display statistics in an easy to read and digestible format. boberdoo has nearly sixty different types of reports, some of which vary based on the lead type. Each of these reports can be exported as a PDF, CSV, or Excel file. You can run these reports at any time under the Reports tab, or your reports can be automated.

Timed Reports

The process of setting up timed reports is pretty simple. From your dashboard, click the Reports tab. Then, under the Reports tab, there will be a section called "Timed Reports." A small "+Add New" button should appear above the Reports list. Clicking on this will show this window:

The screenshot shows the 'Add new timed report' window in the boberdoo system. The window is titled 'Add new timed' and contains the following fields and options:

- Report Type:** A dropdown menu with 'Admin Leads Report' selected.
- Time Period:** A dropdown menu with 'Today' selected, followed by a time range selector showing '00' and '23' with '59' in the minutes field.
- Status:** A dropdown menu with 'Not Active' selected.
- Email Type:** A dropdown menu with 'Email' selected.
- Email to send:** A text input field.
- Email Subject:** A text input field with a note '(optional, keep blank for)'. Below it is a larger text area for the email body.
- Email Body:** A text input field with a note '(optional, keep blank)'. Below it is a text input field for the email name with a note 'optional, time magic'.
- Frequency:** A dropdown menu with 'Every Day' selected.
- Interval:** A dropdown menu with 'Every Hour' selected.
- Send to:** A dropdown menu with 'No' selected.
- Zip file name:** A text input field.

The background shows the boberdoo dashboard with the 'Reports' tab selected in the left sidebar. The sidebar also lists various report types like 'Agled Leads Reports', 'Old Custom Reports', 'Custom Reports', 'Vendors', 'Sales Reps', 'Whommed Custom Reports', 'Custom Sales Reps Reports', 'Timed Reports', 'Mid prospects', 'Inbound Phone', 'Inside sales', 'MT Performance Testing', and 'Contact Us Contacts'.

Here you can select which report you would like, how extensive the report is, how often you would like it, what time of day, how it gets sent, and many more options. The “Day to send” field allows reports to be automated on certain days of the week, every day, or a certain day of the month. Once you are done, hit the Submit button and the report will show up in the Timed Reports list.

Exporting Reports

You can also export any standard report that the boberdoo system runs. To export standard reports, choose the report you want to run, the date range you want to run it for, and click generate. boberdoo then runs that report and displays it in the system. After this is done, you will have the option to save it to your desktop.

With boberdoo’s new interface, exporting reports is easier than ever before. Rather than having to create a ticket for exports, you can now export reports directly from the Leads page by using the export feature.

To learn more about reports, check out our reports guides:



Reports Guide



Reports Definitions

CRON JOBS

Cron Jobs are automated processes that we can input into your boberdoo system that can perform a wide variety of functions. These can be automated reports, lead reprocessing, or anything else you need through our custom work.

Some examples of general cron jobs that boberdoo clients run are:

Invoice Manager:

Automatically send out invoices to partners in a customizable, recurring e-mail

Timed Reports:

Run statistical reports automatically and send them out via e-mail at customizable intervals.

Authorize.netCIM:

Process automatic payments for the Authorize.netCIM system.

TICKETS

Our sophisticated ticket system is available to make sure you get any help you need in a timely fashion. By submitting tickets to our client services team, any sort of technical support, feature requests, or questions can be responded to quickly. When submitting tickets, be sure to be as specific as possible. If a Lead, Partner, or Vendor ID is available and applicable, be sure to include it.

When requesting a new lead type, be sure to include the name of the lead type and all necessary filters and fields. For a new custom delivery, be sure to include the lead type, whether the lead is Ping Post or shared, whether the lead uses static or dynamic pricing, and any specs that have been provided for you.

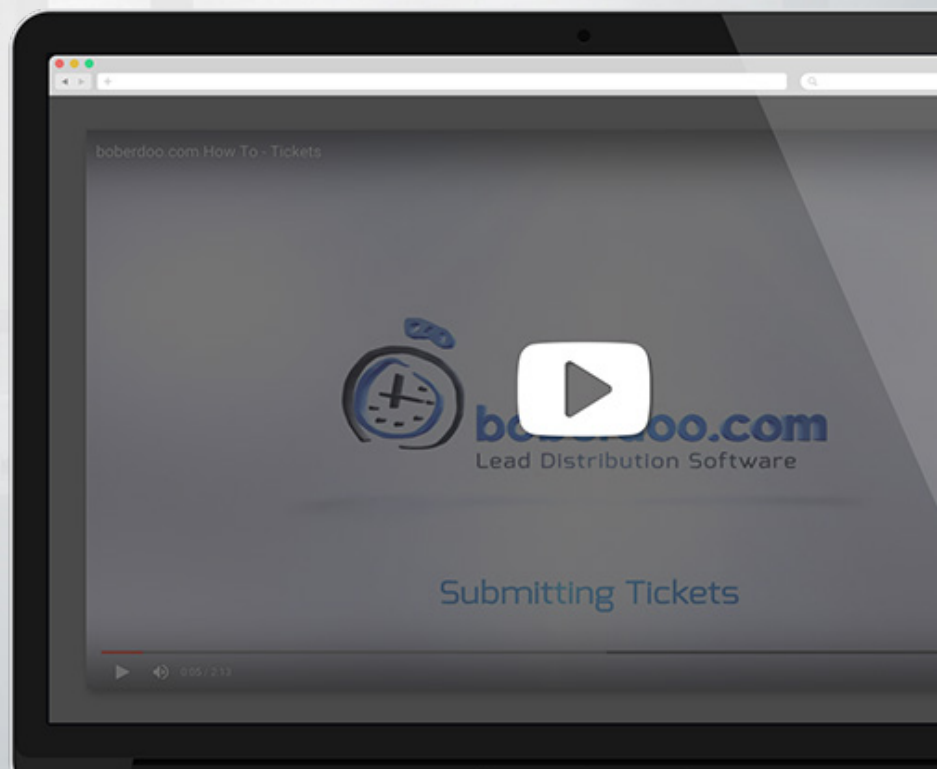
To see how our ticket system works in more detail, take a look at these resources:



[Tickets Overview](#)



[Sample Tickets](#)



ADDITIONAL RESOURCES



[Video Library](#)



[Support Articles](#)



[Online Chat: 8:30 - 5:00 CST Monday-Friday](#)



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