

1. M&P page login credentials

Username: confirmer

Password: wine&cheese

2. M&P leads page- leads color meaning:

Blue- A brand new lead that has been confirmed, but not yet delivered to ANY vendor

Green- A confirmed (usable) lead which has already been delivered to at least 1 vendor

White- a brand new lead which hasn't been confirmed or enriched yet.

3. Downloading leads in a CSV as a customer's template from the M&P leads pages:

On the [M&P leads page by campaign](#)- select the campaign, select the leads then choose the "Download CSV (Template Based)" option.

Manage and Post Leads

[See or update the default job function suppression list](#)

Filters

Date Received: from 03/17/2023 until 04/17/2023

Product: (Show leads matching any of the product's categories)

Categories: (Show leads belonging to these categories)

Country (Select multiple with Ctrl-)	Company size (Select multiple with Ctrl-) Leads without a company size are always included	Job Level (Select multiple with Ctrl-)	Lead Types (Select multiple with Ctrl-)	Lead codes (Select multiple with Ctrl-)	Lead Code Prefixes (separate with comma)
<div> <div>EMEA</div> <div>NA</div> <div>APAC</div> <div>APJ</div> <div>EUROPE</div> <div>MIDDLE_EAST</div> <div>WESTERN_EUROPE</div> <div>USA</div> </div>	<div> <div>Self Employed</div> <div>1-10 Employees</div> <div>11-50 Employees</div> <div>51-200 Employees</div> <div>201-500 Employees</div> <div>501-1,000 Employees</div> <div>1,001-5,000 Employees</div> <div>5,001-10,000 Employees</div> </div>	<div> <div>Staff/ Specialty</div> <div>C Level</div> <div>Director</div> <div>Senior Manager</div> <div>Head</div> <div>Manager</div> </div>	<div> <div>ProductCaseStudy</div> <div>ProductCategoryReview</div> <div>ProductCategoryShortlist</div> <div>ProductComparisonReport</div> <div>ProductComparisonReview</div> <div>ProductReviewCaseStudy</div> <div>ProductRoundupReport</div> <div>Vendor</div> </div>	<div> <div>CS-ARQ</div> <div>CTN</div> <div>DI-OC</div> <div>DI-OSC</div> <div>DKNL</div> <div>int-app-bt</div> <div>int-app-pdy-10-c</div> <div>int-app-l</div> </div>	

Option Filters (click to toggle)

Submit

Actions

Campaign Allbound Standard Leads- PRM (complimentary) - Csv2leads.313

Download CSV Download CSV (Template Based) Deliver Leads, Assign to Campaign Assign to Campaign

Generate Lead IDs string Lead Data Report Lead Data Report Light

Sending a test lead for a campaign

Enter 1 as the Lead ID and click Submit. The test lead will

Choose the campaign, select the test lead and then click F

A test lead will be sent to the CRM but the lead will not be

Message Area

Leads

Colors: Data Confirmed Leads Voice Confirmed Leads Used & Valid Leads Unusable Leads Unused Leads Delivered

86 leads match the current selection criteria. Updated 07:50:54

Select all

[illegible]

On the regular M&P leads page Select the leads by filter, hit submit, select the leads and choose the campaign who's template you would like to associate them with. After doing this, the "Download CSV (Template Based)" option will be available. Click to download.

Manage and Post Leads

See or update the default job function suppression list

Filters

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Product: (Show leads matching any of the product's categories)

Categories: (Show leads belonging to these categories)

Country (Select multiple with Ctrl-)

EMEA
NA
LATAM
APJ
EUROPE
MIDDLE_EAST
WESTERN_EUROPE
USA

Company Size (Select multiple with Ctrl-)

Leads without a company size are always included

Self Employed
1-10 Employees
11-50 Employees
51-100 Employees
201-500 Employees
501-1,000 Employees
1,001-5,000 Employees
5,001-10,000 Employees

Job Level (Select multiple with Ctrl-)

Staff/Specialty
C Level
VP
Director
Senior Manager
Head
Manager

Lead Types (Select multiple with Ctrl-)

ProductCaseStudy
ProductCategoryReview
ProductCategoryShortlist
ProductComparisonReport
ProductComparisonReview
ProductReviewCaseStudy
ProductRoundupReport
Vendor

Lead codes (Select multiple with Ctrl-)

CS-ARQ
CTN
DI-OIC
DI-OSC
DKNL
int-cpp-bf
int-cpp-dg-010-c
int-cpp-ll

Lead Code Prefixes (separate with comma)

Option Filters (click to toggle)

Submit

Actions

Campaign Allbound Standard Leads- PRM (complimentary) - Csv2Leads:313

Download CSV Download CSV (Template Based) Deliver Leads, Assign to Campaign Assign to Campaign
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Leads

Colors: Data Confirmed Leads Voice Confirmed Leads Used - Valid Leads Unusable Leads Unused Leads Delivered

86 leads match the current selection criteria. Updated 07:50:54

Select all

User (hover for lead id)	Lead Code	Job	First	Last	Title/Function	Level	Email	Phone (Click on "x" to show additional phone number if present)	Phone 2	Company	Co. Industry	Co. Size (hover for name)	City	State	Zip Code	Categories (hover for full list)	Time	Used (hover for details)	Mark
719779	OS-GNB	Debbie	Perrault	Director, Information Technology National	director	depperrault@greatheartamerica.org	(602) 386-1869	+36022661669	GREAT HEARTS ACADEMIES	112	B	US	Buckeye	AZ	85326	Data Loss Prev...	Apr-17	N	Unuse
719781	OS-GNB	Pankaj	Shrivastava	Chief Executive Officer	chief	pankaj@practicalspeaks.com	+14082444452	+8552020252	practical speak	consultancy	B	US	Santa Cl...	CA	95051	Cloud Monitor...	Apr-17	N	Unuse
719613	OS-HAY	Richard	Sherman	Senior Systems Administrator	senior_manager	richard.sherman@oswego.com	+13155329154	+13159635245	OSWEGO COUNTY	family services	B	US	Schenec...	NY	12302	HCI	Apr-15	N	Unuse
719530	OS-GNB	Jean-Claude	Lature	Project manager	manager	jc@berias.com	+14384926745	+15144499056	Berias Inc.	construction	B	CA	La Prairie	QC	J6R	Project Managem...	Apr-14	N	Unuse

- M&P pages: usable leads only filter option:
we now have the ability to filter leads by "usable leads only".

Manage and Post Leads

[See or update the default job function suppression list](#)

Filters

Campaign *

- ☐ Exclude users that have opted out of content requests
- ☐ Include leads by users who are already part of the campaign
- ☐ Include leads by users who are already in a previous related campaign
- ☐ Include omitted leads
- ☐ New leads only
- ☐ Unusable leads only
- ☒ Usable leads only
- ☐ Leads with BANT info only

Date Received: from 04/11/2023 until 04/18/2023

The logic for using this filter option is as follows:

Blue leads will **always** be allowed for both report types when choosing this filter.

Green leads:

For the [M&P leads by campaign report](#), the same logic that is applied by default should be applied here as well. Meaning, if it's a green lead that has already been delivered to the specific vendor we are checking leads for in a previous campaign/current campaign, it should **not** be allowed.

For the [M&P leads by filter report](#), it's more complicated:

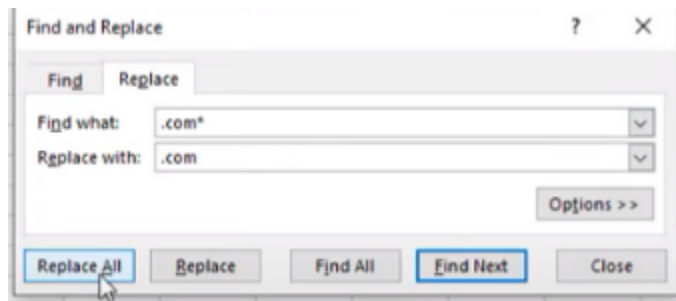
If the "new leads only" box is checked, as well as "usable leads only"---> it should show only **blue leads**.

If the "usable leads only" box is checked---> **blue** and **green** should show up.

If the "New leads only" box is checked---> **blue** and white leads should show up.

This option is helpful for 2 reasons:

1. Minimizing human error when manually delivering leads- so we don't accidentally send them unconfirmed leads
 2. When we need to download a CSV report of only usable/unusable leads, we have both options.
5. For cleaning up domain lists (ABM lists/suppression lists), if you add an asterisk at the end of the domain extension in "Find" in the "Find" tool, then put the domain extension in "replace all" it should clean up all the stuff that comes after the domain extension.



For example, this would change: pcm.com/turbo.ntr.al to just pcm.com

We should do this with all the domain extensions that we see in the domain lists. I've written some down in [this](#) sheet. As we come across more domain extensions in ABM lists, let's add them to the sheet to help each other.

- For intent leads and keeping track of the orders, I copy my intent lead programs from the admin site, and then use that chart format to keep track of how many leads I need to order for this month, next month and any important notes. The campaigns names in the first column are linked to the campaign URLs, which is helpful.

intent lead program	amount of leads to order	end date	TO DO for next month's DEC order	Any other important notes for order that aren't written in the order		
WhiteSource Mend Intent Leads Changeorder	52 per category	31-12-22	check what is left for last month - dec. Ask for leads to be delivered within the first two weeks of december if possible due to the holiday season		half-hourly	270 (65)
CDW Smarter Intent Leads Oct 2022 1 Year	not yet	12-10-23	SamK.			120
Device42 Intent Leads 24 leads	continuation of last month's mid month order	06-01-23	J. B.			
Cisco Duo Smarter Intent Leads Q3-Q4 2022	we need 245 this month and next, they only have 2 cats	30-12-22			half-hourly	820 (332)
Cisco Umbrella Smarter Intent Leads Q3-Q4 2022	328 per month this month (but I ordered 350 just to be safe) and next	30-12-22	check what is left for last month - dec		half-hourly	1630 (974)
Cybereason Smarter Intent Leads 2022	they need 257 leads this month and next month combined, that includes the 30 addit	07-01-23	check what is left for last month - dec		half-hourly	490 (263)
Netsurion Intent Leads		28-02-23	J. B.		daily	75 (37)
Vectra Intent Leads Q4 2022	45 a month this month, next month is last month. Updated to: half of 180 just NDR (H	31-12-22	SamK.		half-hourly	105 (20)
NetScuba Intent Leads 2022-2023	Ordered 60 leads this month (we need 50)	07-01-23	A. D.-N.		half-hourly	300 (196)
Zscaler Intent Leads 2022	ordered the last of the leads	23-11-22	SamK.			368 (329)
ITRS Intent Leads NA	we order 15 a month, they get 20 included non intent leads, this intent leads and the n	01-04-23	J. B.		half-hourly	148 (99)
StreamSets Smarter Intent Leads	19-04-22	15-11-22	SamK.		half-hourly	250 (240)
ITRS Intent Leads 2022 ROW	waiting for last 6 leads	01-04-23	J. B.		half-hourly	356 (217)
Synopsis Smarter Intent Leads March 2022-2023	PAUSED	28-03-23	SamK.	PAUSED		130 (73)
Turbonomic Intent Leads 2022	PAUSED			PAUSED		

The chart doesn't come out so well in a screenshot, so [here](#) is the link to my chart if you want a closer look.

7. Shortcut to add a custom question to multiple categories in a campaign: [Watch video](#)