LEAFFILTER MOBILE APP

Login and Lead Sheet Documentation

An overview of logging in and the lead sheet functionality in the LeafFilter mobile app covering resulting leads and creating jobs.

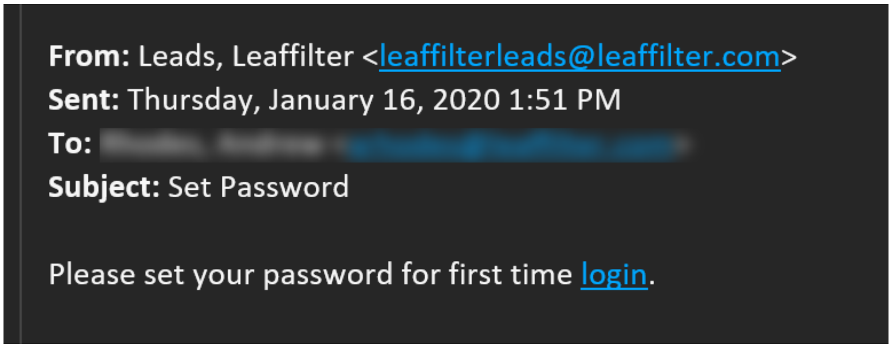
https://leafapp.noclogs.com

I.T. Department

Contact LeafFilter Technical Support: 833-376-8133 / 330-655-0559 / techsupport@leaffilter.com

Registration:

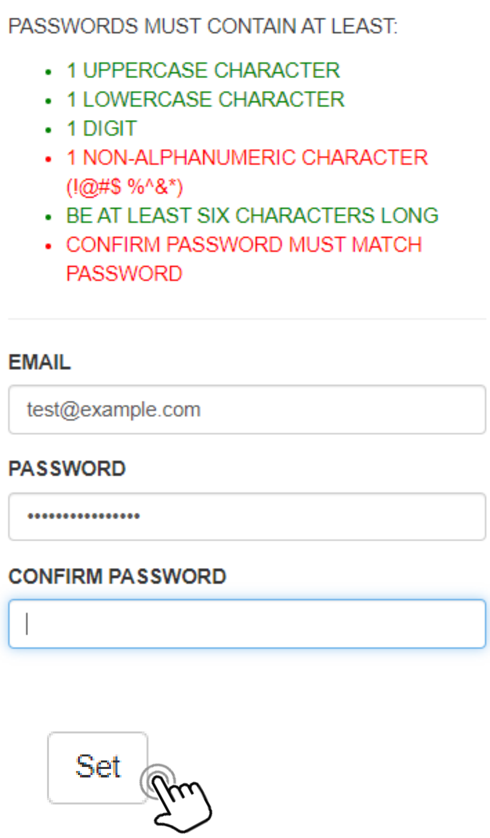
The system will send you an email with the subject: Set Password.


From: Leads, Leaffilter <leaffilterleads@leaffilter.com>
Sent: Thursday, January 16, 2020 1:51 PM
To:
Subject: Set Password

Please set your password for first time login.

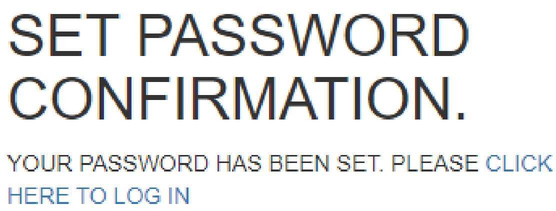
1. Press the login link.

You will be taken to the screen where you will enter your email and set your password for the first time.



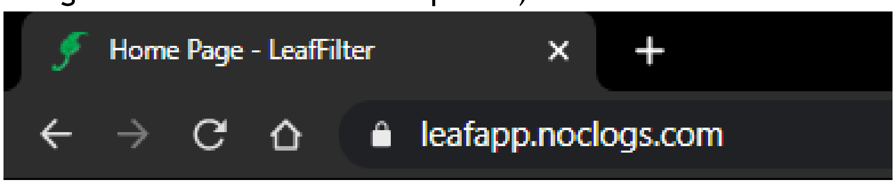
All the password requirements must turn green before the “Set” button appears, allowing you to set your password and login.

2. A successful password set will show the screen below.



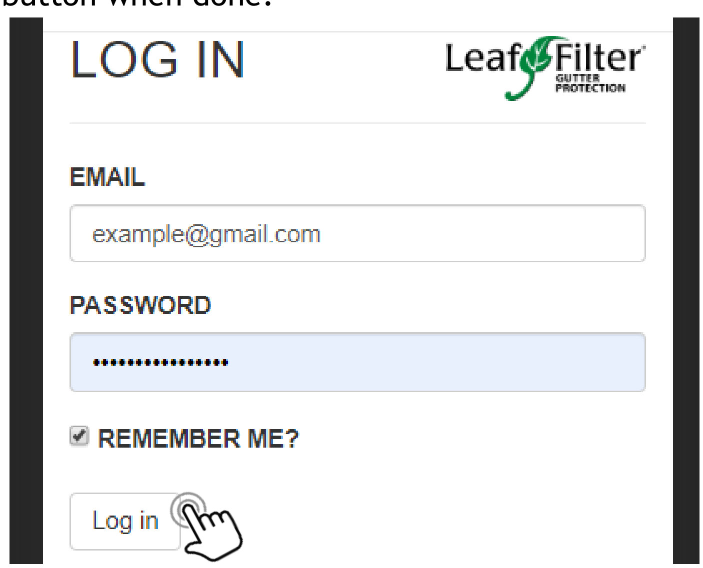
Logging In:

1. Navigate to https://leafapp.noclogs.com in your phone's or desktop's browser. (Such as Google Chrome or Internet Explorer)



2. In the top right, tap the "Login" button

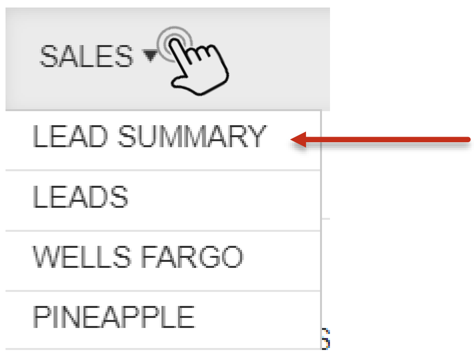
3. Type in your email that LeafFilter has on file and the password you created for the site. Check the "Remember Me" box if you don't want to login every time and press the "Login" button when done.



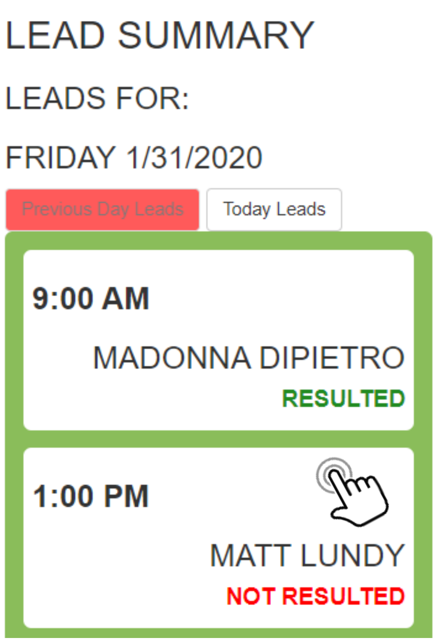
Lead Summary:

Once logged in you can access your daily lead summary and start navigating to your leads.

- Press the menu button in the top left if on your phone then press the “Sales” button and press the dropdown that says, “Lead Summary”. If you’re using a desktop, there is just a bar at the top of the screen that includes the “Sales” button, navigate to the same “Lead Summary” button.



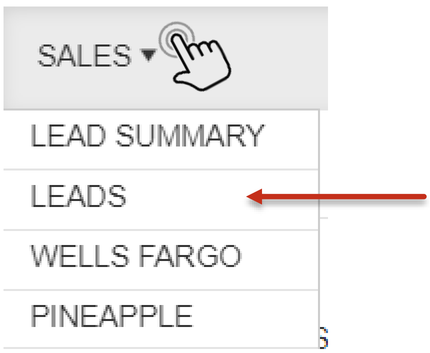
- On this page you can see how many leads you have for the day, their time, and whether you have resulted them or not. tapping one will send you to that individual lead.



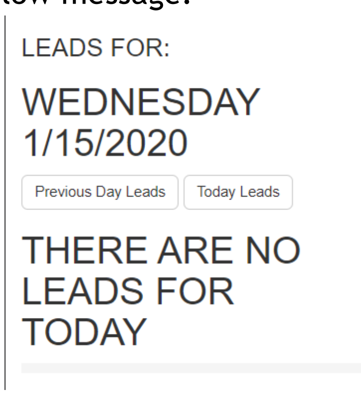
Lead Sheet:

Once logged in you can access your daily lead sheet and start resulting your leads.

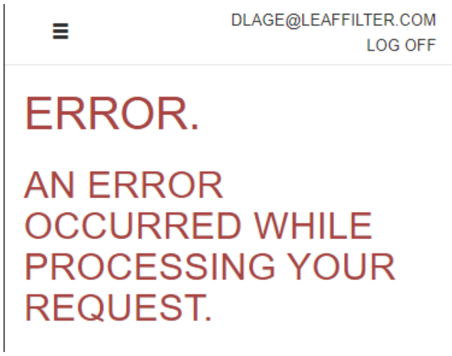
- Press the menu button in the top left if on your phone then press the “Sales” button and press the dropdown that says “Leads”. If you’re using a desktop, there is just a bar at the top of the screen that includes the “Sales” button, navigate to the same “Leads” button.



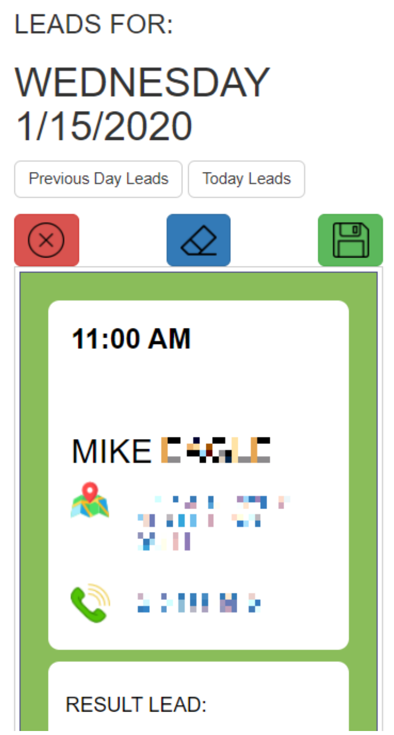
- If your Ops Manager hasn’t assigned any leads to you for the day you will see something like the below message.



- If you receive an error like the picture below, then please press the “Help” button then tap the “Email Support” in the menu and it will send an email to techsupport@leaffilter.com. Please include the issue with your name and office you are assigned to.



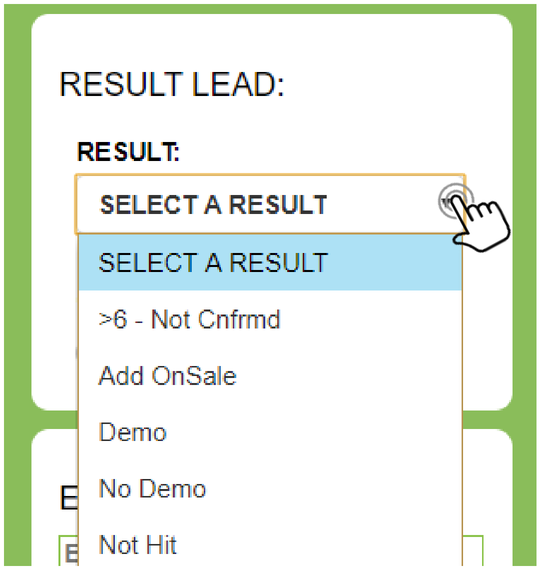
- If you have leads assigned to you then you should see a screen like below. It will automatically pull up your first lead for the day. As you scroll down you will see other information for that specific lead. The customer info has been blurred to protect their info.



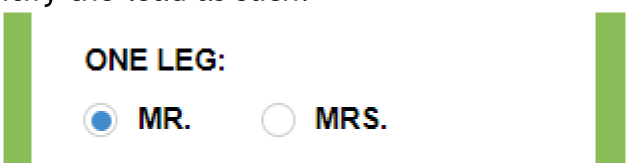
- Tapping the customer's address will open either google maps or apple maps to the customer's address for easy navigation.

- Tapping the customer's phone number will open your phone's call screen with the customer's number ready to call.

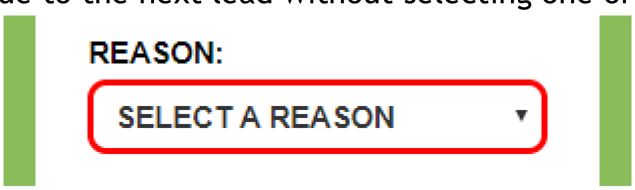
- In the “Result Lead” box you will select from the dropdown, the option that best represents how the meeting with the customer went.



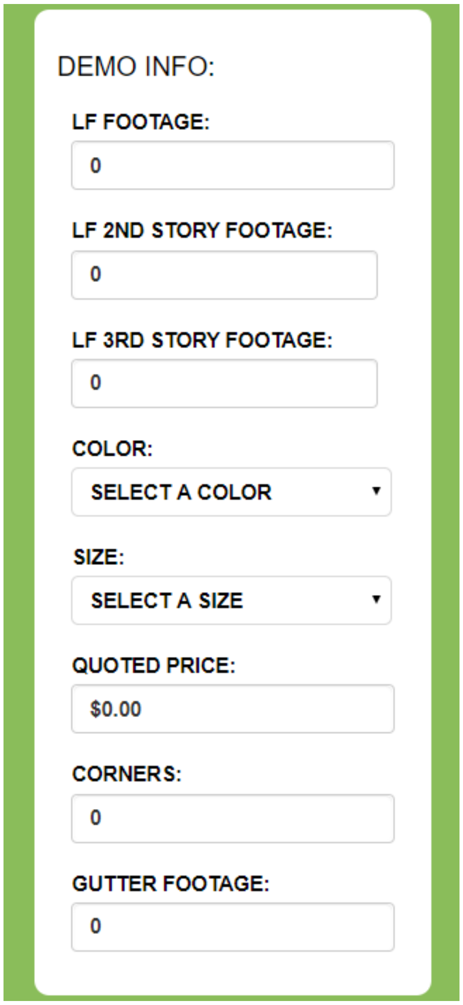
- If the meeting with the customer is a One Leg then press one of the “Mr.” or “Mrs.” buttons to identify the lead as such.



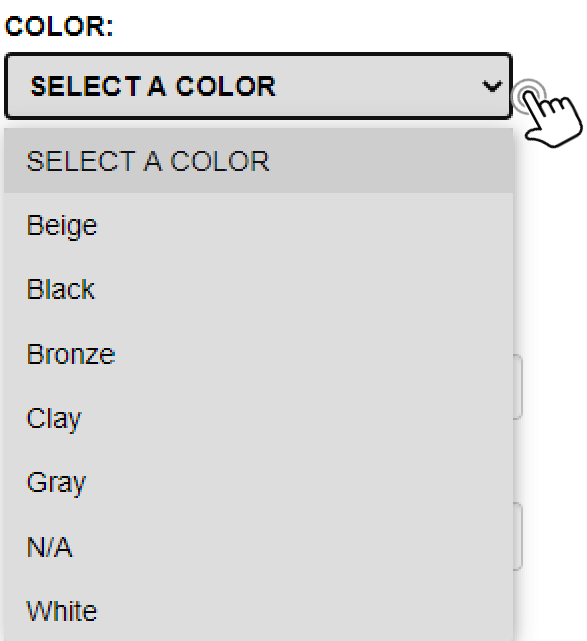
- If you select a result that requires a reason, the app will show a separate dropdown and highlight it red as a visual notification for you to select a reason. You will not be able to continue to the next lead without selecting one or resetting the lead.



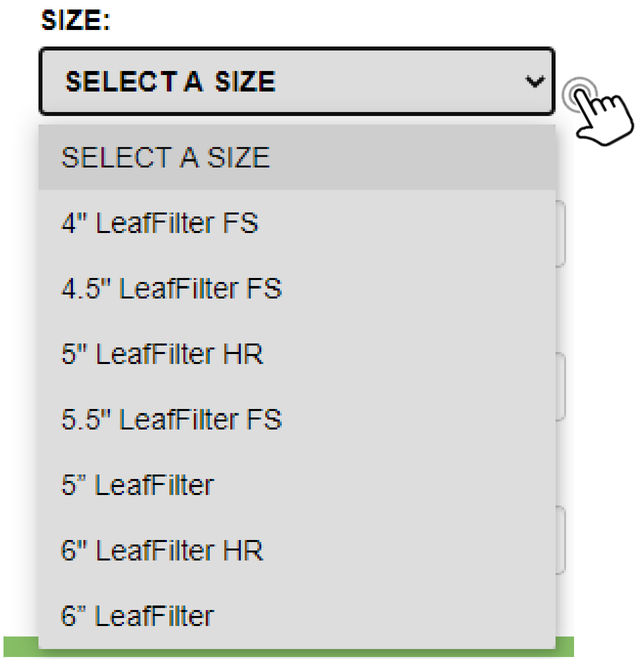
- If the result of the lead is a “Demo” then a new set of boxes will appear below “Result Lead” box. Fill out the information as best as you can that represents the meeting with the customer.



- Fill in the amount of LF footage by story and select a color:



- Select a size:

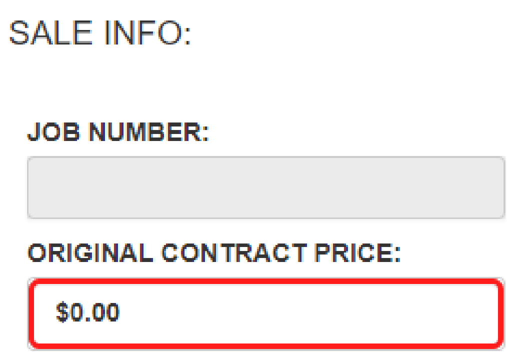


Fill in the number of corners and the gutter footage as applicable.

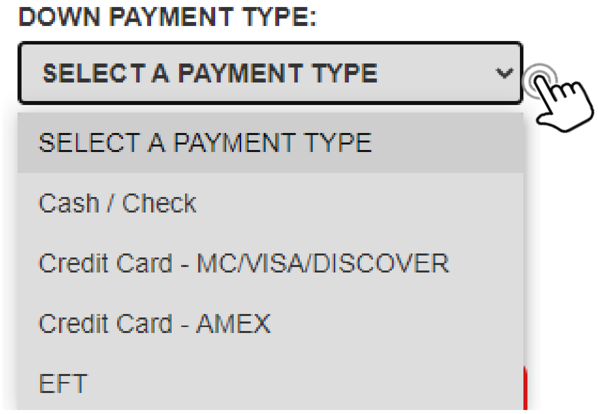
- When the result is a sale, more information will have to be input.

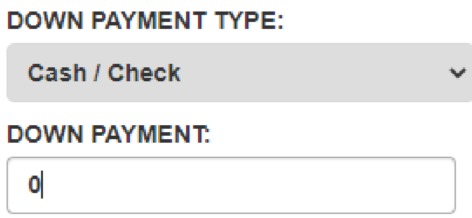
- Before the sale result is saved, the job number will be blank. <u>A job number will be assigned when the lead is saved.</u> Please use the generated Job Number after it is saved as the number for the job and contract to avoid confusion.

- Enter the contract price from the meeting with the customer.

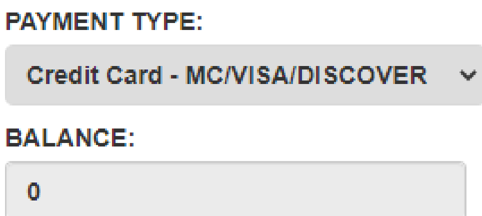


- Select a down payment type if applicable and then enter the down payment amount.

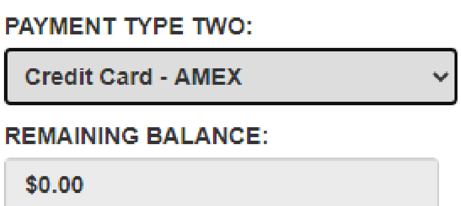


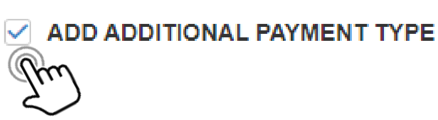


Select a payment type and enter the payment amount where applicable:

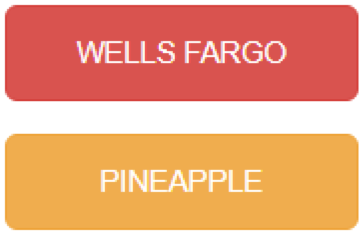


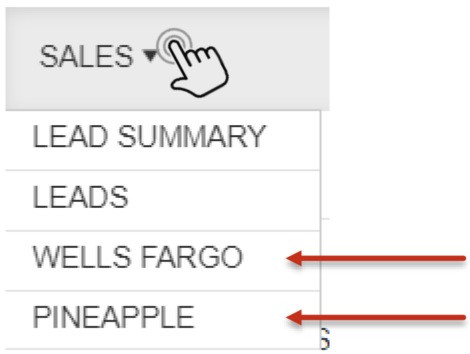
If there is an additional payment type, tap the check box and then select the type and enter the amount.





- If it is needed, there are 2 buttons for payment. Wells Fargo and Pineapple (CC Authorization). These buttons are also in the “Sales” dropdown in the menu

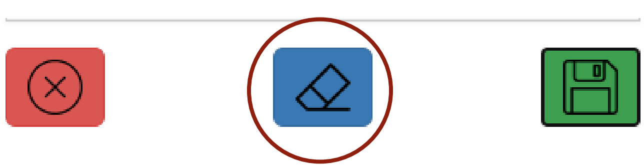




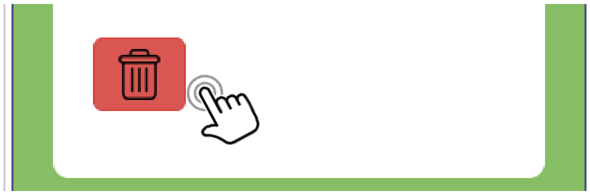
- If you wish to cancel any changes you have made to a lead before they have been saved press the red “X” button at the top of the screen.

- When ready to save a lead either press the green “Save” button or simply page to another lead, it will save automatically.

- If you wish you clear what info is on the lead, then press the blue “Eraser” button and it will reset the lead back to blank



- Once a “Sale” is saved and a job number is created then the “Eraser” will not clear the lead. You must <u>delete</u> the job with the “Trashcan” button at the bottom of the lead details and start over from there.



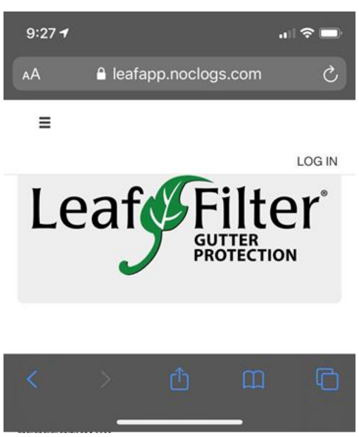
- If the lead has been cancelled it will appear black. But you can still result this lead if you manage to convert it.

Enter in the reason for the CIC if you couldn’t reach them.

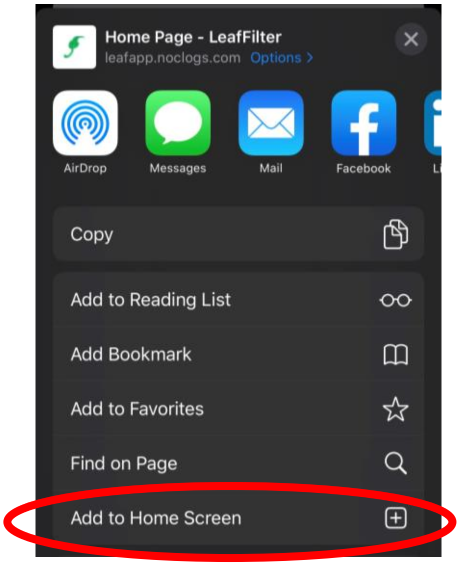
<u>Adding To Your Home Screen:</u>

<u>iPhone</u>

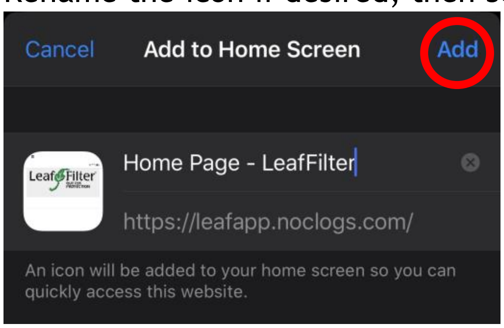
- **Open Safari** and navigate to https://leafapp.noclogs.com
- **Select the Share Icon** at the bottom of the screen.



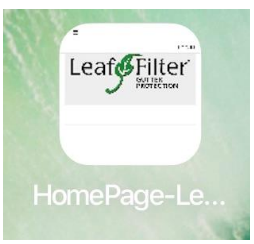
- **Select Add to Home Screen**



- Rename the icon if desired, then **select Add.**



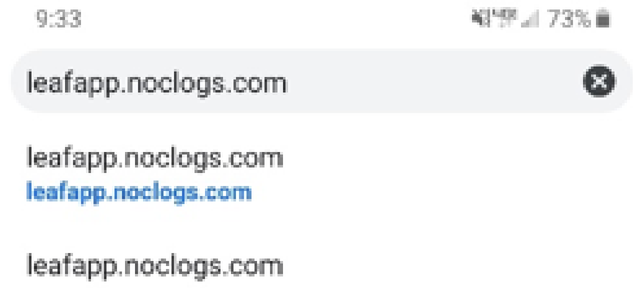
- A new icon for the Mobile App is created on your home screen.



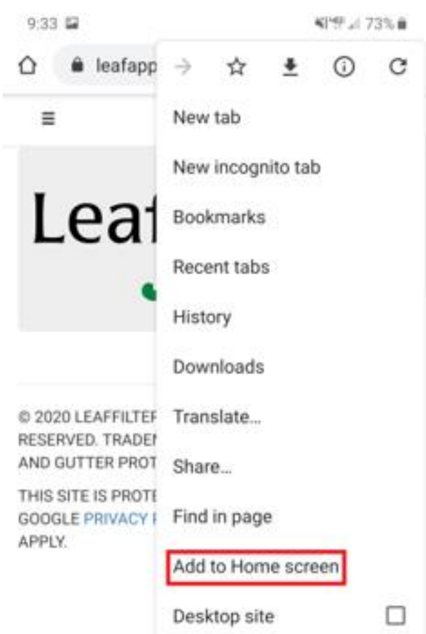
<u>Android</u>

- Open **Google Chrome**, or your preferred internet browser, on your Android phone.

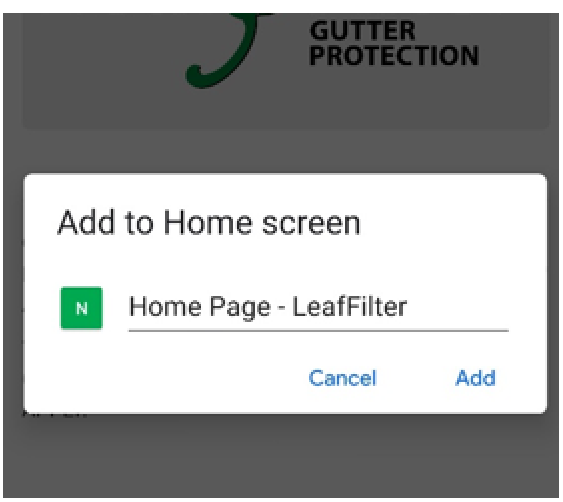
- Navigate to **leafapp.noclogs.com**



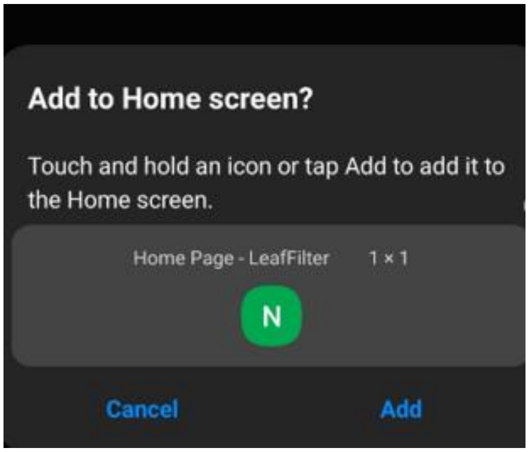
- Select the icon with the **three vertical dots**, in the top right corner of the screen. *Please note — if you are using a browser other than Google Chrome, the browser menu may be indicated by three vertical lines on the top right or bottom right of the screen.*



- You can leave the shortcut name as the default or change it to whatever you would like, then click **Add**.



- Depending on your phone, you may receive an additional prompt to add the icon to the home screen. If so, select **Add**.



- The Web App icon should now be added to your home screen.

If you have any issues or questions please contact your Ops Manager first. If the issue is severe or urgent email the I.T. Department by either pressing the "Help" button then pressing "Email Support" in the menu or at techsupport@leaffilter.com or call us 833-376-8133.

Please include your issues or question, name, office, and phone number we can reach you at if needed.