Need-A-Lead's LMS Getting Started

Before you get started we need to take care of some business to ensure you get the best user experience. You can always click the logo to come back to this page.

On the menu bar, you will see the General tab. In the drop down of the General tab, you will find Organization info. Click on this.

USERS If you want other users such as office help or appointment setters.

AGENTS This is for in-house agents only. They are unable to order and can only retrieve leads.

PAYMENT METHODS - MUST BE FILLED OUT BEFORE ANY ORDERS ARE PLACED

1. Fill out payment name: HINT use the last four digits of the card Example Master Card 4242.
2. Select payment type.
3. Fill out information.
4. Check default payment. The default has to be clicked for ANY CO OP lead payments.
5. **NOTE** E-check, ACH, & Bill Us has to be approved by NAL. You will be notified once we have approved your payment option.

INFORMATION - PLEASE ENSURE YOU HAVE DONE THE FOLLOWING

1. Please ensure your information is ALL correct. Please note that this address is the address we will use to send you hard copies of your leads if you request them.
2. Please select how you prefer to have your lead distributed. Digital only, hard copies only, or both.
3. Please select if you want to have phone numbers entered for your leads. This shows up if you export excel files for example. There is an additional cost for this service and must be selected when you go to billing.
4. Affiliation should be filled out only if you have a company or IMO affiliation that could affect your cost, lead delivery.