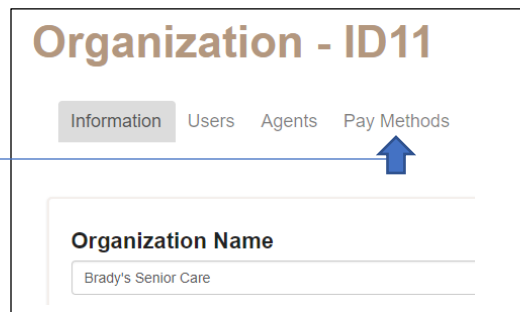


Per Lead Ordering Step by Step

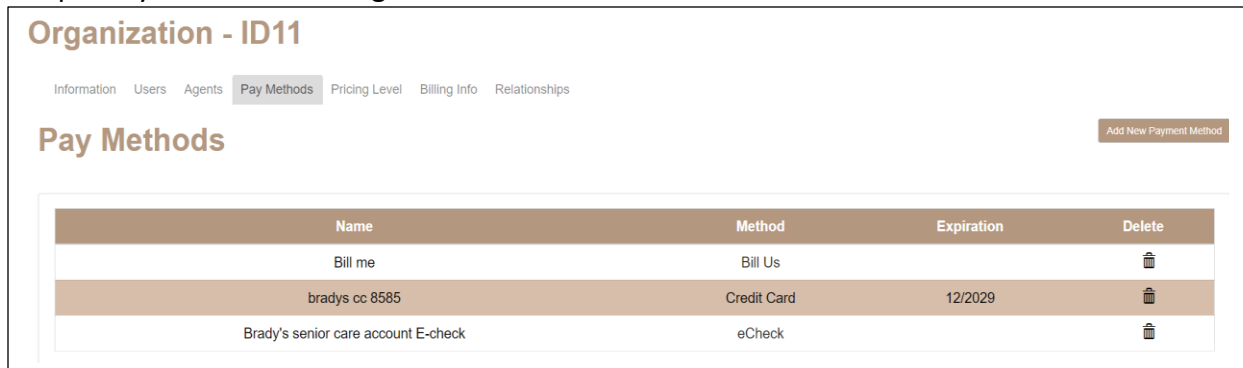
Go to **General** (drop down) click on **Organization Info**

Go to **Payment Methods**

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



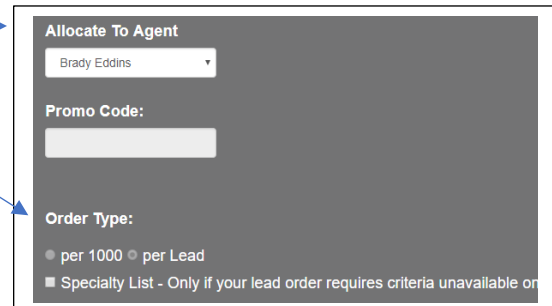
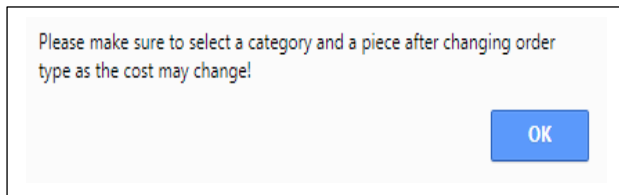
Sample Payment Method Page



OK let's place an order:

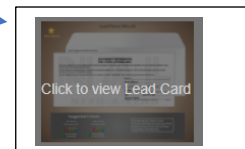
Go to **Ordering** tab (at the very top of page) Click on **New Order**

1. Select agent for order if other than yourself.
2. Under **Order Type** – select per Lead
3. **Note: DO NOT SELECT SPECIALTY LIST**
A box will pop up at the top of the screen,



Click OK, and Click OK again.

4. **Category:** select Final Expense
5. **Piece:** Select desired lead.
Hint: you can click on image to view lead
6. **Select areas by:** zip/SCF codes, city, county. State.
Hint: We recommend using zip codes. Make sure there are enough potentials to fulfill the order in your selected zip code/s.
Hint: Tell us in the notes on the confirmation page what your zip Code preference is.



7. Enter your zip codes (if zip codes don't show up, it means that area is unavailable at this time)
8. Check zip code/s that you want or **Check All** button and click **Add Checked** button.
9. Zip codes will move to **Selected Items**
10. Scroll Down to bottom of page. Enter the **Quantity** of leads you want. (Minimum is 20)

Select areas by...
Zip/SCF Codes

To add zip codes from an Excel file, click the Upload Zip Code File button. File type must be of type .xlsx

Upload Zip Code File

Type one or more zip/SCF codes (separated by spaces)

836 Search

Check All Uncheck All Add Checked

- 83602, BANKS, ID (9)
- 83611, CASCADE, ID (516)
- 83612, COUNCIL, ID (477)
- 83615, DONNELLY, ID (242)
- 83616, EAGLE, ID (1619)
- 83617, EMMETT, ID (2792)
- 83618, EDUETTE, ID (1181)

Selected Items Total Count: 320

Remove All

- 83604, BRUNEAU, ID /
- 83610, CAMBRIDGE, ID /

Quantity Total Cost Go to Billing →

11. Click on **Go to Billing**

Create Order Billing Confirm Order

Per Lead	Drop Quantity	Cost Per Lead
	20	\$35.00
Total Order Cost		\$700.00
Discount		-\$0.00

Add Products

- Mail hard copies PL 1.00
- Key phone numbers 1.00

TOTAL COST OF THIS ORDER: \$700.00

The Campaign ID is optional and for your own PO # or other identifier for this order.

Campaign ID:

Defaults to order # (PO#) This is for you to change if you have your own internal order / campaign ID

Payment Methods

Who is Paying?	Method/Payer	Amount	Delete
<input type="text" value="My Account"/>	<input type="text" value="brady cc 8585 *****4242"/>	<input type="text" value="\$ 700.00"/>	<input type="text" value="🗑"/>

Payment methods must be removed and readded to adjust amounts

Remaining \$ 0.00

Indicate who will be paying for this order. You can split the cost of the order between multiple accounts. Using your upline to pay for some or all of this order is limited to the agreement set forth between your account and their account.

Discount (if applicable)

You can add Products like: Mail Hard Copies, Key phone Numbers.

13. **Payment Methods:** This is where you put in, how your order is being paid for.

14. Click **Confirm Order** button. This brings you to the Confirmation Page. Look over everything that you have selected. This page also has the Note section that we mentioned in Step 6.

Notes:

Receiving Hard copies of leads: If hard copies of the leads is requested, those leads will be sent to the address provided under your organization information page. It is your responsibility to keep that up to date.

I have read the [what is a lead](#) document. By checking this box I understand what Need-A-Lead considers a qualified lead.

I have reviewed my order and accept the [terms and conditions](#)

I understand that I am agreeing to purchase ALL additional leads generated from my order, and that leads can continue to come in for months after the initial lead order is mailed.

Per lead Criteria: Per lead criteria is set by NAL unless another arrangement has been made with NAL.

Geography: NAL will mail enough potentials based off number of leads ordered using the geography requested. NAL may use any of the geography given to fulfill the lead order.

Powered by **stripe**

[← Back to Billing](#)

[Confirm and Submit](#)

You will need to check on three boxes here before you can Confirm and Submit your order. Once you submit you order, your order can not be changed and your payment method will be charged.