



# Lead Management

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## Introduction

Lead management (LM) delivers the foundational infrastructure for capturing, routing, assigning, managing, and tracking mortgage leads in Total Expert. This includes:



- Creation and storage of lead opportunities linked to contacts
- Lead sources and optional routing policies with automated routing and assignment rules
- Manual lead assignment and reassignment
- Activity logging for key lead activities such as Lead Created, Lead Assigned, Lead Reassigned, Lead Stage Change
- Standard set of pre-defined lead stages
- Enhancements to pipeline views that:
  - Display leads
  - Support filtering based on lead attributes
- Email notifications to users when leads are assigned
- Compatibility with other TE systems, such as customer intelligence (CI) and journeys, as upstream generators of new leads

Each lead record is associated with a parent contact record. A single contact record may have many lead records.

#### Note

The “lead management” (LM) feature being described here has some similarities to, but is distinct from, the previous feature known as “advanced lead management” (ALM).

Lead Management is intended to help mortgage and lending organizations increase conversion, retain customers, and give LOs a modern, intuitive system for managing new business. Across the industry, lenders struggle with fragmented lead workflows, slow response times, inconsistent assignment rules, and limited visibility into who is working what—all of which lead to missed opportunities and churn. LM centralizes and standardizes this critical process inside Total Expert.

LM is designed for mortgage lenders, particularly those who:

- Operate in referral-based purchase markets
- Rely heavily on loan officer relationships and partner-driven opportunities
- Use Total Expert’s CI tools as a source of insight-driven leads
- Need a unified system to manage inbound, partner, and automated lead creation

For these organizations, LM serves a broad set of roles:

- Loan officers (LOs) and loan officer assistants (LOAs)
- Sales managers, branch managers, and team leads
- Marketing managers and demand generation teams

## Sample Use Cases

### *Administrator*

- Creates lead sources and routing policies
  - Applies routing filters to users in these policies
  - Pauses and unpauses routing to specific users
- Manually creates a lead in the UI
- Selects a lead source for that lead



- Assigns the lead directly to a user or routes the lead based on the routing policy for that lead source
  - The routing policy definition redistributes leads to available team members.
- Pauses routing to an LO temporarily

### *Loan Officer*

- Manually creates a lead in the UI from a referral
- Immediately reaches out, logging the outcome and adding a note about the conversation

### *Automation*

- CI triggers an insight.
  - The insight triggers a journey.
  - The journey automatically creates a lead and assigns it according to the routing policy for the lead source specified in the journey operator (or, as an override option, to the LO that owns that relationship).
- A lead status change triggers a journey.

### *All Users*

- View leads in pipeline views based on saved lists and views that an administrator has configured
- View lead attributes in pipeline views
  - Apply filters based on these attributes
  - Sort columns based on these attributes

## Lead Records

A lead record is like a child of a contact record. A contact can have 1 or more leads, with each lead representing a sales opportunity with that contact. There is no limit to how many leads a contact can have, but more than 100 leads per contact cannot be displayed in pipeline views.

All leads have the following attributes. Those with a red asterisk (\*) are required when creating or editing a lead.

#### **Note**

As of the initial release, these fields are not set up to use as Liquid tags in email or other templates. Neither is there any way of creating custom fields for a lead record.

- Lead ID (system generated; cannot be passed in via the importer or reset manually)
- Created Date (system generated; cannot be passed in via the importer or reset manually)
- Updated Date (system generated; cannot be passed in via the importer or reset manually)
- Lead Source\*
  - Must be a valid lead source that has been configured for your organization; cannot be free-form text
- Assignee
- Lead Stage
- First Name (on contact record)\*
- Last Name (on contact record)\*
- Email (on contact record)\*\*



- **\*\***Either Email or Cell Phone is required on new lead creation, not both
  - Must be a properly formatted email address
- Cell Phone (on contact record)**\*\***
  - **\*\***Either Email or Cell Phone is required on new lead creation, not both
  - Must be a properly formatted phone number
- Referred By
- Loan Purpose\*
  - Allowable values:
    - Purchase
    - Refinance - No Cash Out
    - Refinance - Cash Out
    - HELOC
    - Home Equity Loan
    - Reverse Mortgage
    - Second Mortgage
    - Construction Loan
    - Other
    - TBD (when the loan purpose is not yet known, this is the default)
- Loan Amount
- Property Type
  - Allowable values:
    - Single-Family
    - 2-4 Unit
    - Condo
    - Co-op
    - Manufactured Housing
    - Planned Unit Development (PUD)
    - Other
- Occupancy
  - Allowable values:
    - Primary Residence
    - Second Home
    - Investment
    - Other
- Credit Rating (Self Reported)
  - Allowable values:
    - Excellent
    - Good
    - Fair
    - Poor
- Estimated Purchase Price
- Down Payment
- Desired Timeframe
  - Allowable values:
    - Next 30 days



- 3 months
    - 6 months
    - 6+ months
- Already Found Home?
  - Allowable values:
    - Yes
    - No
    - Unknown
    - [blank]
- First Time Buyer?
  - Allowable values:
    - Yes
    - No
    - Unknown
    - [blank]
- Veteran?
  - Allowable values:
    - Yes
    - No
    - Unknown
    - [blank]
- Property Address

**Note**

The values stored in lead record fields do *not* overwrite corresponding fields in the associated contact record (or vice versa).

## Lead Stages

A standard set of lead stages is available by default. These are *not* customizable as of the initial release. The standard stages provide a foundation with standard, out-of-the-box reporting and analytics, reducing the need for custom reports.

In a future enhancement, users will be able to edit the display names of the standard lead stages, choose stages to enable or disable for their organization, and add additional stages.

Stage #	Stage Name	Description
1	New	Lead has been added to the system but no outreach has been made yet. Default stage for new leads unless otherwise specified during creation.
2	Contact Attempted	An outreach attempt (call, email, or text) has been made, but no response.
3	Engaged	2-way communication has occurred—the lead has responded and is actively engaged.

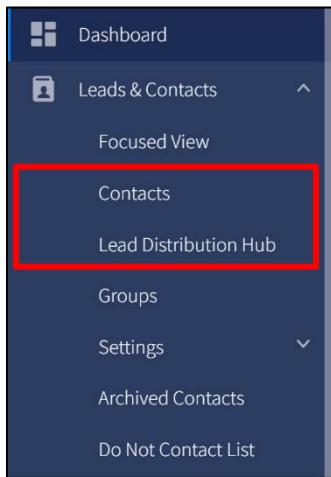


Stage #	Stage Name	Description
4	Application Started	The borrower has begun the loan application process but has not submitted it yet.
5	Application Submitted	The borrower has completed and submitted their loan application.
6	Pre-Approved	The borrower's application has been pre-approved.
7	In Process	The loan is being processed and/or underwritten—work is happening behind the scenes.
8	Closed	The lead has reached a final outcome: funded, withdrawn, declined, or lost.

## Overall Navigation

Navigate to **Leads & Contacts** → **Contacts** to access leads via their parent contact records.

Administrators can navigate to **Leads & Contacts** → **Lead Distribution Hub** to configure lead sources and routing policies.



## Lead Creation

### Manual Entry

You can manually create a lead record from any page header or directly from a contact record.

- From anywhere in TE: Click the **Add** menu (+ symbol in the header bar of every page) and select **Create Lead**.
  - Once you fill out the form, the system checks for an existing contact in the user's account (not across the entire organization) to attach the new lead to. If it does not find a matching contact record, a new contact record is created with that new lead attached.



The screenshot shows the TotalExpert Contacts page. At the top right, there is a 'Create Contact' button, an 'Add Connection' button, and a 'Create Lead' button, all enclosed in a red box with an arrow pointing to it. Below these buttons is a 'Create Lead' link. The main area displays a table of contacts with columns for Name, Lead Stage, Lead Source, Loan Purpose, Rate, New Rate, Monthly Savings, New Monthly Payment, Funded Date, Lead Updated Date, and Monthly Payment. Two contacts are listed: Annie Quince and Andrea Jones. A yellow box highlights the '1 lead(s) filtered' message at the bottom of the table.

- From contact details page: Select the **Leads** tab and click the **+New Lead** button on the left side.
  - A lead record is created and attached to that specific contact.

The screenshot shows the contact details page for Ms. Annie Quince. At the top, there is a 'CUSTOMER INTELLIGENCE: RATE ALERT' message: 'Annie has an opportunity to refinance'. Below this, the 'Leads' tab is selected, and a red box highlights the '+ New Lead' button. The page also shows a 'Refinance - No Cash Out' section with a '\$150,000.00' loan amount and a 'Contact Attempted' status. Navigation buttons at the bottom include '1 - 1 of 1', '<<', '<', '1', '>', and '>>'.

The Create Lead box opens.

- If you selected the option from the Add menu, the form appears as shown. Fill out the form and click the **Save** button to create the new lead. Fields marked with red asterisks are required.



Create Lead

Contact Details

First Name \*

Last Name \*

Email  Phone Cell

Required if phone is not provided. Required if email is not provided.

Lead Opportunity

Loan Purpose \*

Lead Source \*

Referred By

Assignee

This lead will be assigned to you. You can reassign the lead after it's created.

Cancel Save

- If you select the option from the contact record, you do not need to provide the contact details on the left side of the form, because they are automatically drawn from the contact record. Fill out the Lead Opportunity fields and click the **Save** button to create the new lead. Fields marked with red asterisks are required.

### Note

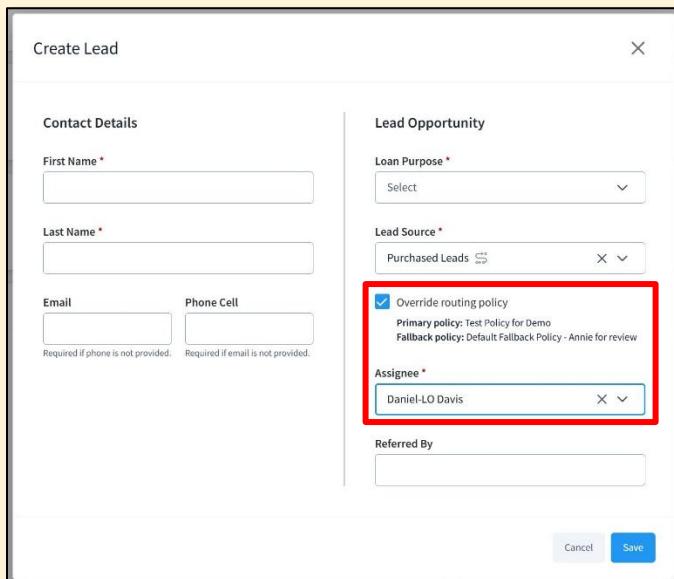
When an administrator creates a lead, their view of the drop-down list under Lead Source includes a routing icon for any sources whose definitions include routing policies. This icon is *not* shown in the view for non-administrators.

Lead Source *
Select a lead source
Purchased Leads
Purchased Leads for Daniel
CI Equity Alert Demo
CI Rate Alert Demo
Referral

Lead Source *
Select a lead source
The Best Lead Source
Kelly's Lead Source - purchased leads
Purchased Leads
Purchased Leads for Daniel
CI Equity Alert Demo



Additionally, when an administrator selects a lead source with a routing policy, the policy (and fallback policy, if applicable) are listed. You then have the option to check a box to override these policies. If this box is checked, you must then select a specific user to assign the lead to.



Create Lead

Contact Details

First Name \*

Last Name \*

Email  Phone Cell

Required if phone is not provided. Required if email is not provided.

Lead Opportunity

Loan Purpose \*

Lead Source \*

Override routing policy  
Primary policy: Test Policy for Demo  
Fallback policy: Default Fallback Policy - Annie for review

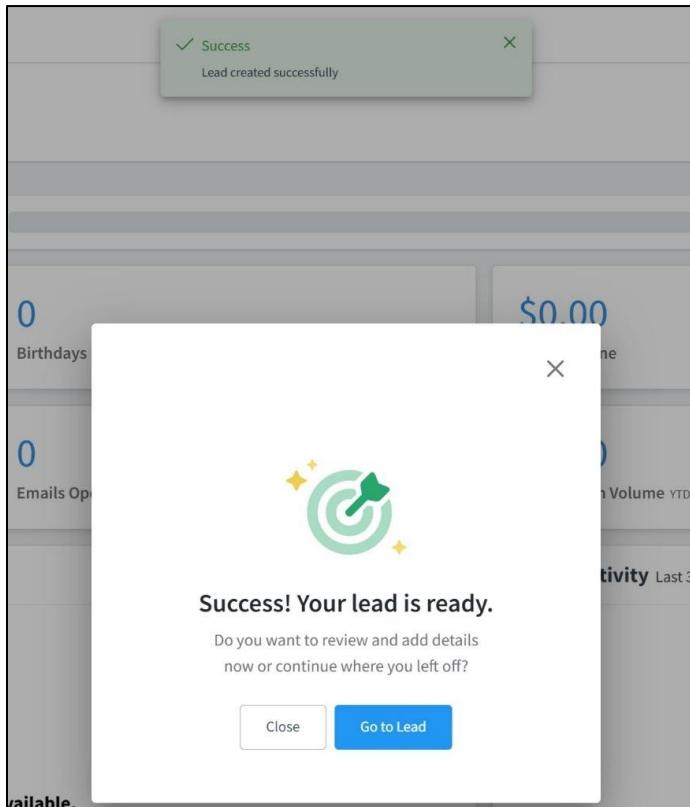
Assignee \*

Referred By

Cancel Save

For a non-administrator, the lead is automatically assigned to the user creating the lead, ignoring the routing policy.

A success message appears when the lead has been created successfully. Click the **Go to Lead** button to proceed directly to the lead details in the contact record page.





## Import – Ad Hoc and Recurring

Select **Import Data** in the navigation menu and use the new Leads import type. The lead source is specified at the file level, meaning all leads in that file have the same source.

### Tip

Download the new Leads template from the Data Imports page for a setup including all of TE's standard lead attribute fields. Otherwise you will have to map your columns to TE's fields during the import definition.

For all leads in an import file, the user can choose to either:

- Assign all leads in the file to a specific user
- Route all leads in the file based on the lead source and its accompanying routing policy

## Journeys

Leads and their attributes can be used to configure a journey for contacts.

- Triggers
  - Lead Created
  - Lead Updated
  - Lead Stage Changed
- Actions
  - Create Lead
    - Specify lead source
    - Option to override routing and assign to contact relationship role:
      - the user who owns the contact record
      - the user whom the contact record is assigned to
      - the journey user in context
- Conditions
  - Any lead attribute can be used as a condition in a journey operator.
    - This is similar to the existing Contact Value condition.
    - These can also be used as inline conditions.

## Not Supported

- EAPI
- Lead capture apps (LCA)
- Single Property Sites (SPS)
- ALC (Rebel IQ)

## Lead Sources and Routing Policies

Administrators can create and edit lead sources and routing policies by navigating to **Leads & Contacts → Lead Distribution Hub**. This page is organized into separate tabs for lead sources and routing policies; each shows a list of all the relevant items in that category and some basic details about each one. The Sources tab loads by default.



Lead Distribution					
Sources		Policies			
Source	System Key	Primary Policy	Fallback Policy	Created	
Kelly's Lead Source - purchased leads	kelly_purchased_leads	Kelly's policy	Direct Assignment to Daniel	January 23, 2026 at 12:02:41 PM CST	
Purchased Leads	purchased_leads2	Test Policy for Demo	Default Fallback Policy - Annie for review	January 22, 2026 at 4:30:19 PM CST	
Purchased Leads for Daniel	purchased_leads	Direct Assignment to Daniel		January 22, 2026 at 1:14:45 PM CST	
CI Equity Alert Demo	ci_equity	CI Equity Alert Routing	Direct Assignment to Daniel	January 21, 2026 at 9:09:52 PM CST	
CI Rate Alert Demo	ci_rate_demo	Rate Refi Opportunities from CI		January 20, 2026 at 2:27:05 PM CST	
Referral	referral			January 16, 2026 at 2:49:05 PM CST	

Click the **Policies** tab to switch to the list of routing policies.

Lead Distribution					
Sources		Policies			
Routing Policy	Sources	Routing Targets	Created		
The Best Policy		West Region	January 27, 2026 at 4:15:34 PM CST		
Rate Refi Opportunities from CI	CI Rate Alert Demo		January 23, 2026 at 1:07:11 PM CST		
Default Fallback Policy - Annie for review	Purchased Leads	frame_22348784 lname_22348784	January 23, 2026 at 12:05:24 PM CST		
Kelly's policy	Kelly's Lead Source - purchased leads	Media Testing Group	January 23, 2026 at 12:02:26 PM CST		
Test Policy for Demo	Purchased Leads	Media Testing Group	January 22, 2026 at 4:29:48 PM CST		
Demo Team Routing - Multi Team		Sarai Dreher	January 21, 2026 at 9:12:57 PM CST		
Direct Assignment to Daniel	CI Equity Alert Demo, Kelly's Lead Source - purchased leads, Purchased Leads for Daniel	Daniel-LO Davis	January 21, 2026 at 9:09:51 PM CST		
CI Equity Alert Routing	CI Equity Alert Demo		January 21, 2026 at 9:09:29 PM CST		
Demo Policy for Listing Alerts			January 21, 2026 at 7:08:16 PM CST		
Demo Policy for CI Rate Alert		Sarai Dreher, Media Testing Group	January 20, 2026 at 2:26:39 PM CST		

### Note

Only administrators have access to this page.

## Lead Sources

A lead source is required on every lead and can optionally be used for routing if that configured lead source has a routing policy associated with it.

A lead source for a lead record is fully distinct from and independent of the source associated with a contact record. Specifically:

- A lead's Lead Source field is never set to match the contact's Source field.
- A contact's Source field is never set to match the lead's Lead Source field. For example:
  - When a new lead is created for an existing contact, the contact's Source field is not updated to match the lead's Lead Source field.



- When a new lead is created and causes a new contact record to be created, the contact's Source field is not initially set to match the lead's Lead Source field.

To create a lead source:

1. Navigate to **Leads & Contacts → Lead Distribution Hub**.
2. Click the **Create Lead Source** button in the upper-right corner of the page.
3. In the Create Lead Source box:
  - a. In the **Source Name** field, enter a distinctive name for the lead source. This name appears in the UI whenever a lead source is named. This can be edited later.
  - b. In the **System Key** field, enter a unique name that contains no spaces or special characters. This name is used in the back end. This cannot be changed once the lead source is saved.
  - c. (optional) In the **Description** field, enter text that describes what the lead source is and how it should be used.
  - d. In the **Primary Routing Policy** field, either:
    - i. Select an existing routing policy from the drop-down list.
    - ii. Click the **Create New** button to open a slide-out panel. (This has the same options as the general form to create a new routing policy; see Routing Policies below.) Fill out the form and click the **Create** button to add the new policy, then select it in the Create Lead Source box.
    - iii. Leave the field blank. In this case, the lead source does not rely on an automatic routing policy, and any leads with this source must be assigned manually.
  - e. In the **Fallback Routing Policy** field:
    - i. If the Primary Routing Policy field was left blank, this must also be left blank.
    - ii. If you selected a primary policy, you can leave this blank (in which case any leads from this source that cannot be assigned by the primary policy would have to be assigned manually), or you can select or create a policy to act on any leads that cannot be assigned by the primary policy. See Fallback Policies below for more details.
  - f. Click the **Save** button.

The screenshot shows the 'Lead Distribution' page with the 'Sources' tab selected. A modal dialog box titled 'Create Lead Source' is open. The dialog contains the following fields:

- Source Name\***: A text input field with the placeholder 'Where will the leads come from?'
- System Key\***: A text input field with the placeholder 'Create a unique system key' and a note 'No spaces or special characters, ex: LendingTree'
- Description**: A text input field with the placeholder 'Add a description (optional)'
- Primary Routing Policy**: A dropdown menu with the placeholder 'Search by name' and a 'Create New' button.
- Fallback Routing Policy**: A dropdown menu with the placeholder 'Search by name' and a 'Create New' button.

At the bottom of the dialog are 'Cancel' and 'Save' buttons. The background of the page shows a list of existing lead sources and policies, with columns for 'Policy', 'Created', and 'Last Activity'.



When the lead source is submitted successfully, a success message appears at the top of the page.

The screenshot shows the TotalExpert Lead Distribution Hub. At the top right, a green success message box displays "Lead source created successfully". Below the message, there are two buttons: "Create Routing Policy" and "Create Lead Source". The main area is a table titled "Lead Distribution" with two tabs: "Sources" and "Policies". The "Sources" tab is selected, showing a list of lead sources with columns for "Source", "System Key", "Primary Policy", "Fallback Policy", and "Created". The data in the table is as follows:

Source	System Key	Primary Policy	Fallback Policy	Created
The Best Lead Source	best_source	The Best Policy		January 27, 2026 at 4:16:00 PM CST
Kelly's Lead Source - purchased leads	kelly_purchased_leads	Kelly's policy	Direct Assignment to Daniel	January 23, 2026 at 12:02:41 PM CST
Purchased Leads	purchased_leads2	Test Policy for Demo	Default Fallback Policy - Annie for review	January 22, 2026 at 4:30:19 PM CST
Purchased Leads for Daniel	purchased_leads	Direct Assignment to Daniel		January 22, 2026 at 1:14:45 PM CST
CI Equity Alert Demo	ci_equity	CI Equity Alert Routing	Direct Assignment to Daniel	January 21, 2026 at 9:09:52 PM CST
CI Rate Alert Demo	ci_rate_demo	Rate Refi Opportunities from CI		January 20, 2026 at 2:27:05 PM CST
Referral	referral			January 16, 2026 at 2:49:05 PM CST

At the bottom of the table, it says "1 - 7 of 7".

## Routing Policies

A routing policy determines which users are eligible to have certain leads assigned to them. This is done either by selecting teams of users and applying filters or by selecting a single user.

Any number of lead sources can be mapped to the same routing policy.

To create a routing policy:

1. Navigate to **Leads & Contacts** → **Lead Distribution Hub**.
2. Click the **Create Routing Policy** button in the upper-right corner of the page.
3. In the Create Routing Policy box:
  - a. In the **Policy Name** field, enter a distinctive name for the routing policy. This name appears in the UI whenever a routing policy is named.
  - b. Select the **Routing Target**:
    - i. If you want lead assignments using this routing policy to be distributed among various members of a team, click the **Team(s)** button. Then, in the field below, select 1 or more teams whose members would be eligible to receive lead assignments via this routing policy.



The screenshot shows the Lead Distribution interface with the 'Policies' tab selected. A modal dialog box titled 'Create Routing Policy' is open in the center. The 'Policy Name' field contains 'The Best Policy'. The 'Routing Target' section shows 'Team(s)' selected. The 'Distribution Type' field shows 'Round Robin'. At the bottom of the dialog are 'Cancel' and 'Create' buttons. The background table lists various routing policies and their details, such as 'West Region' and 'January 27, 2026 at 4:15:34 PM CST'.

Routing Policy	Sources	Routing Targets	Created
The Best Policy	CI Rate Alerts	West Region	January 27, 2026 at 4:15:34 PM CST
Rate Refi Opportunities from CI	Purchase	fname_22348784 lname_22348784	January 23, 2026 at 1:07:11 PM CST
Default Fallback Policy - Annie for review	Kelly's Leads	Media Testing Group	January 23, 2026 at 12:05:24 PM CST
Kelly's policy		Media Testing Group	January 23, 2026 at 12:02:26 PM CST
Test Policy for Demo	Purchase	Sarai Dreher	January 22, 2026 at 4:29:48 PM CST
Demo Team Routing - Multi Team		Daniel-LO Davis	January 21, 2026 at 9:09:51 PM CST
Direct Assignment to Daniel	CI Equity Alerts		January 21, 2026 at 9:09:29 PM CST
CI Equity Alert Routing	CI Equity Alerts		January 21, 2026 at 7:08:16 PM CST
Demo Policy for Listing Alerts		Sarai Dreher, Media Testing Group	January 20, 2026 at 2:26:39 PM CST
Demo Policy for CI Rate Alert			

### Note

Once a routing policy using teams is created, you can refine its definition using the canvas later. See [Routing Filters](#) and the [Policy Canvas](#) below.

- ii. If you want all leads using this routing policy to be assigned to the same user, click the **User** button. Then, in the field below, select the specific user.

The screenshot shows the 'Create Routing Policy' dialog box. The 'Policy Name' field contains 'The Best Fallback Policy'. The 'Routing Target' section shows 'User' selected. A dropdown menu is open, showing 'Daniel-LO Davis' as the selected option. The 'Distribution Type' field shows 'Direct'. At the bottom are 'Cancel' and 'Create' buttons.

- c. Click the **Create** button.



## Fallback Policies

A lead source can optionally select a secondary routing policy to use as the “fallback” option when the primary policy’s routing rules are unable to assign a lead. If the fallback policy is also unable to assign a lead, the lead is either:

- Unassigned, if a matching contact was found in the routing policy
- Rejected as an error, if a matching contact was not found (leads cannot exist in the system without a parent contact)

## Routing Filters and the Policy Canvas

Routing logic and filters are configured in the canvas.

A routing filter is a way to control which types of leads a specific user can get. Administrators can filter which leads are routed to a user, based on information in the lead record.

Supported filters:

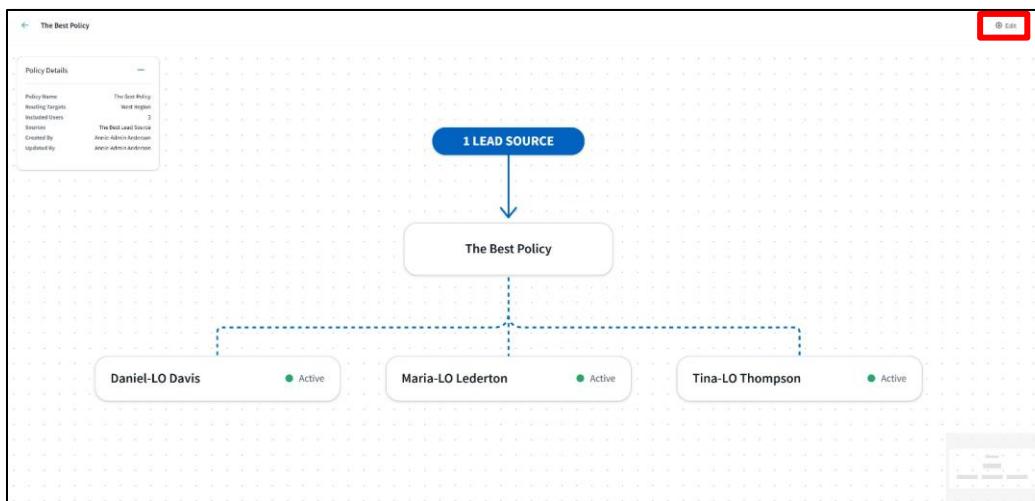
- Property State
- Property Zip
- Loan Purpose
- (TBD) State License Match
- (TBD) Lead Volume
- (TBD) Credit Rating / Credit Score

### Note

These will all be available for the first general release, but may not all be available during the beta phase.

To edit a routing policy:

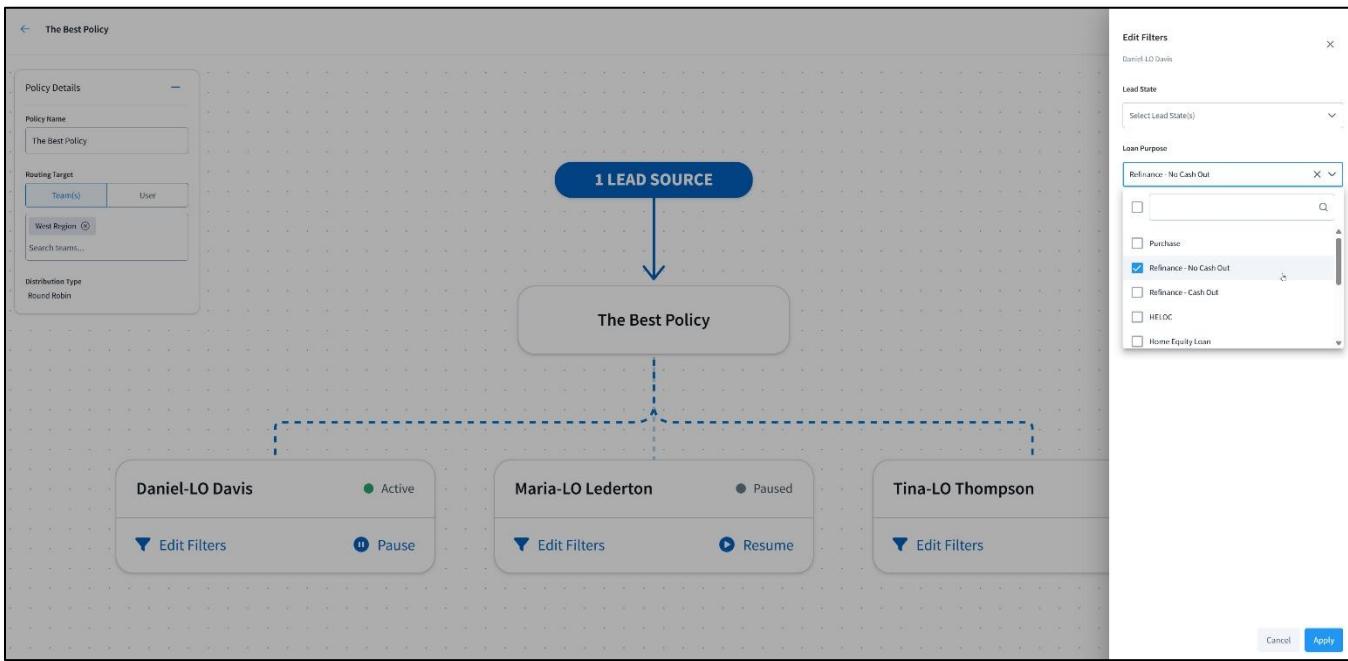
1. From the Lead Distribution page, select the **Policies** tab.
2. Click the name of the routing policy you want to edit. The editing canvas opens.
3. Click the **Edit** button in the upper-right corner.



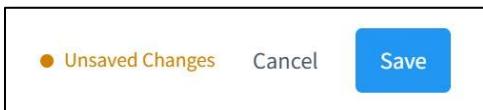


4. In editing mode, you can:

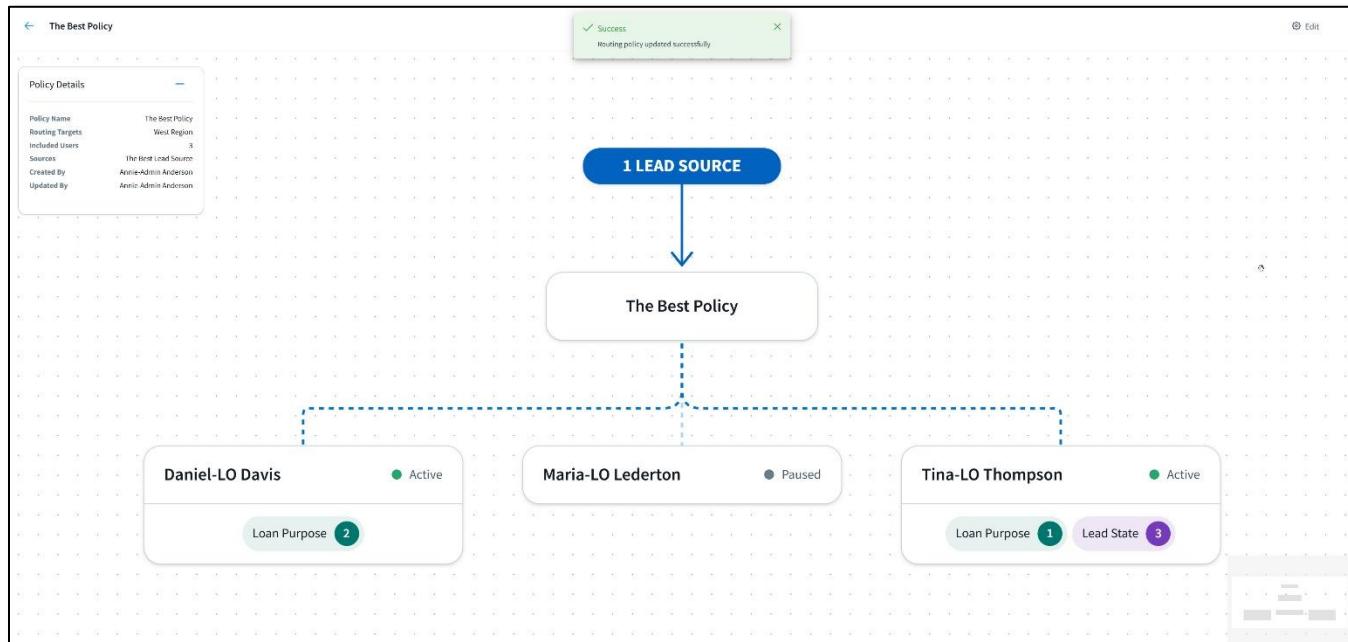
- Update the policy details in the upper-left corner.
- Toggle whether an individual user is active or paused for this policy by clicking either **Pause** or **Resume** in their box. (You might pause a user while they are on vacation, for example, and resume them when they return.) In the example shown below, Maria has been paused, and Daniel is active.
- Edit the filters for an individual user by clicking **Edit Filters** in their box. This opens a slide-out panel where you can refine which lead attributes must apply to a new lead for the selected user to be eligible to have that lead assigned to them. Click the **Apply** button at the bottom of the panel to add the filters to the box for the user on the canvas.



5. When you have made changes that have not taken effect, there is an **Unsaved Changes** label in the upper-right corner of the page. If you click the **Cancel** button, those changes will be discarded, and the policy reverts to its last saved state.



6. When you are finished making updates to your users, click the **Save** button in the upper-right corner. A success message appears at the top of the page when the changes are saved successfully. Click the **←** button in the upper-left corner to return to the Lead Distribution page.



## Viewing and Managing Leads

Lead assignment email notifications:

- Users get an email notification every time a lead is assigned to them. A link in the email takes them directly to that lead record.
- Lead assignment email notifications can be turned off via an organization setting.

Pipeline views:

- Existing tabs and views will remain unchanged, though leads can be viewed and managed from existing pipeline views.
  - All lead attributes are available to use as columns and inclusion/exclusion filters, as desired.
- Users can filter pipeline views to show only contacts with leads, or to show unassigned leads.

### Tip

Push pipeline view tabs and lists with LM attributes to teams of users that have LM access. Otherwise, these views would appear empty for non-LM users.

The My Contacts tab shows a summary of your applicable leads at the top and various attributes for each contact in the list. As always, you can configure the specific columns and filters and save views.



The screenshot shows the 'Contacts' page with a summary dashboard at the top. The dashboard includes 'TOTAL LEADS' (8), 'ACTIVE PIPELINE BY STAGE' (new lead: 5, contact attempted: 1, application started: 2), and 'CLOSED' (0). Below the dashboard is a search bar and a list of leads. The lead list includes columns for Name, Referred By, Lead Stage, Lead Referred By, Lead Source, Loan Purpose, Credit Rating, Lead Updated Date, Lead Created Date, and Already Found Home. The leads listed are Jose Sanchez, Penelope Martin, Holly Hunter, Bobby Anderson, Annie Quince, and Anya Larsen. A yellow box highlights a contact for Annie Quince, indicating more leads exist for that contact but are not displayed due to the applied filter.

If a contact has more than one lead, but the applied filter in the view shows only a subset of those leads, a message is displayed with the contact information on the left side of the page. This yellow information box indicates that there are more leads for that contact, but they are not displayed because they do not match the applied filter.

In the custom view shown below as a new tab, the list has been filtered to show only contacts with customer intelligence refinance (CI refi) leads.

The screenshot shows the 'Contacts' page with a summary dashboard at the top. The dashboard includes 'TOTAL LEADS' (8), 'ACTIVE PIPELINE BY STAGE' (new lead: 10, contact attempted: 1, application started: 2), and 'CLOSED' (0). Below the dashboard is a search bar and a list of leads. The lead list includes columns for Name, Lead Stage, Lead Source, Loan Purpose, Rate, New Rate, Monthly Savings, New Monthly Payment, Funded Date, Lead Updated Date, and Monthly Payment. The leads listed are Annie Quince and Andrea Jones. A yellow box highlights a contact for Annie Quince, indicating 1 lead(s) filtered.

## Editing and Viewing Lead Information on a Contact Record

Users with access to the contact record that a lead record is attached to can view that lead record by navigating to **Leads & Contacts → Contacts**, clicking on the contact's name to open the contact record, and selecting the **Leads** tab. The list of leads associated with the contact is shown on the left side of the page, and the details for the selected lead are shown in the main panel.

If you have access to edit the lead record, you can click **Edit** in the Lead Opportunity Details section. You can also update the lead status by selecting an option from the drop-down list from the summary tab on the left side of the page.



**Lead Opportunity Details** **Edit**

**Lead Qualification**

Desired Timeframe: Already Found Home: First Time Buyer: Veteran

Next 30 days

**Loan Details**

Loan Amount: \$150,000.00 Estimated Purchase Price: Down Payment: Self Reported Credit Rating: Excellent Loan Purpose: Refinance - No Cash Out

Property Type: Occupancy: Product Category: mortgage

**Overview**

Lead Assignee: Daniel LO Davis Source: CI Rate Alert Demo Referred By: Created: January 26, 2026 at 2:47:02 PM CST Updated: January 26, 2026 at 2:49:12 PM CST

Lead ID: 019bfc0f-56d0-7614-8ff5-7f03ae989f0b

**MEMOS**

**Tasks (0)**

**Recent Notes**

Type a note...

Select Outcome (optional)

Select Lead (optional)

Hide note from co-marketing partners

+ Add Note

Outcome: Left vrm  
Lead: Refinance - No Cash Out (New Lead)  
Tried calling twice, no answer.

When you click **Edit**, you can enter or select new information for any editable fields on the lead record (some fields, such as the Lead ID are fixed). When you are finished making updates, click the **Save** button.

**Lead Opportunity Details** **Save**

**Lead Qualification**

Desired Timeframe: Already Found Home: First Time Buyer: Veteran

Next 30 days **Yes**

**Loan Details**

Loan Amount: \$150,000 Down Payment: Self Reported Credit Rating: Excellent Loan Purpose: Refinance - No ...

Property Type: Occupancy: Product Category: mortgage

**Overview**

Lead Assignee: Search and a... Source: CI Rate Alert Demo Referred By: Enter referred by... Created: January 26, 2026 at 2:47:02 PM CST Updated: January 26, 2026 at 2:48:12 PM CST

Lead ID: 019bfc0f-56d0-7614-8ff5-7f03ae989f0b

**MEMOS**

**Tasks (0)**

**Recent Notes**

Type a note...

Select Outcome (optional)

Select Lead (optional)

Hide note from co-marketing partners

+ Add Note

Outcome: Left vrm  
Lead: Refinance - No Cash Out (New Lead)  
Tried calling twice, no answer.  
Created on 01/27/2026 by Daniel LO Davis.

When you create a note on a contact record with at least 1 lead, with or without an outcome, you also have the option to select a lead that the note should be associated with. This helps in identifying and filtering the related lead activities in the Activity tab.



Lead Opportunity Details [Edit](#)

**Lead Qualification**

Desired Timeframe	Already Found Home	First Time Buyer	Veteran
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**Loan Details**

Loan Amount	Estimated Purchase Price	Down Payment	Self Reported Credit Rating	Loan Purpose
Property Type	Occupancy	Product Category	mortgage	

**Overview**

Lead Assignee	Source	Referred By	Created	Updated
Daniel - LO Davis	Referral	Miki Dora	February 2, 2026 at 2:09:34 PM CST	February 2, 2026 at 2:09:36 PM CST

Lead ID: 019c1f9-8ecf-7fc4-8760-ec52b9789446

**MEMOS**

**Tasks (0)**

**Recent Notes**

Tried again, no answer.

Lead ID: 019c1f9-8ecf-7fc4-8760-ec52b9789446

Select Lead (optional): [Refinance - No Cash Out \(Application Submitted\)](#)

Outcome: Left VM  
Lead: Refinance - No Cash Out (Application Submitted)  
Created on 02/02/2026 by Daniel - LO Davis

Outcome: Sent email  
Lead: Purchase (New Lead)  
Created on 02/02/2026 by Daniel - LO Davis

Click the **Activity** tab to view information about all the activity recorded for the contact. This includes the following lead-related actions:

- Lead Created
- Lead Assigned
- Lead Updated
- Lead Stage Changed

Profile Leads Products Marketing Office365 **Activity** Insights Responses

Sort By: Newest First [▼](#) Display: All [▼](#)

**Recent Notes**

Lead Updated (Refinance - No Cash Out)  
By Daniel - LO Davis  
via Jason Sitzman  
Lead opportunity details updated.  
Lead: Refinance - No Cash Out

Lead Stage Changed (Refinance - No Cash Out)  
By Daniel - LO Davis  
Changed from [Contact Attempted](#) to [Application Submitted](#).  
Lead: Refinance - No Cash Out

Outcome: Left VM  
By Daniel - LO Davis  
via Jason Sitzman  
Email: [robert@example.com](mailto:robert@example.com)  
Cell Phone: 6546546544  
Lead: Refinance - No Cash Out (Application Submitted)

Outcome: Sent email  
By Daniel - LO Davis  
via Jason Sitzman  
Email: [robert@example.com](mailto:robert@example.com)  
Cell Phone: 6546546544  
Lead: Purchase (New Lead)

**MEMOS**

**Tasks (0)**

**Recent Notes**

Type a note...

Select Outcome (optional): [Left VM](#)

Select Lead (optional): [Purchase \(New Lead\)](#)

Hide note from co-marketing partners [?](#) [+ Add Note](#)

## Reporting and Analytics

A standard weekly and monthly report is available with data about leads for an organization. To access the report:



1. Navigate to **Reporting & Analytics → Standard Reports**.
2. Either:
  - a. Click the **Weekly Reports** tab and select **Weekly Lead Management Activity Report** from the drop-down list.
  - b. Click the **Monthly Reports** tab and select **Monthly Lead Management Activity Report** from the drop-down list.
3. Proceed as usual by selecting the desired date filter and downloading the report.

The Lead Management Activity Report provides comprehensive lead pipeline insights through unit- and volume-based metrics at both the individual and organization levels, empowering users sales managers, and administrators to track performance and optimize engagement. This report has the following column headers:

Column Name	Business Description
organization_id	Unique identifier for the organization that owns the lead record.
lead_id	Unique identifier for the lead record.
contact_id	Unique identifier for the contact associated with the lead.
lead_first_name	First name of the lead.
lead_last_name	Last name of the lead.
lead_email	Primary email address provided by the lead.
lead_mobile_phone	Mobile phone number provided by the lead.
lead_origin	High-level origin of the lead (for example, manual entry, integration, form).
lead_source	Specific marketing or referral source that generated the lead.
lead_created_at	Timestamp when the lead was created in the system.
loan_purpose	Intended purpose of the loan provided by the lead.
loan_amount	Estimated loan amount requested by the lead.
referred_by	Name or identifier of the referral source, if applicable.
assigned_to_user_id	User ID of the loan officer or team member assigned to the lead.
assigned_to_first_name	First name of the assigned user.
assigned_to_last_name	Last name of the assigned user.
assigned_to_email	Email address of the assigned user.
assigned_to_user_role	Role of the assigned user in the organization.
assigned_to_user_status	Current employment or activation status of the assigned user.
assigned_to_user_teams	Teams or groups the assigned user belongs to.
new_lead	Indicates whether the lead is newly created and not yet worked.
contact_attempted	Indicates that at least 1 outbound contact attempt was made (call, email, or SMS).
contacted	Indicates that successful 2-way communication with the lead occurred.
application_started	Indicates whether the lead has begun a loan application.
application_submitted	Indicates whether the loan application was fully submitted.
pre_approved	Indicates whether the lead has received a pre-approval decision.



Column Name	Business Description
in_process	Indicates whether the loan is actively being processed.
closed	Indicates the loan has closed or funded.
most_recent_outcome	Most recent lead activity or life cycle outcome.

## Limitations in the Current Version

The initial release of Lead Management has a few limitations that will be addressed in future releases. They are documented here for awareness. As these features are enhanced, this document will be updated.

### Contact Matching

When distributing a new lead via the relevant routing policy, the system does not check across the entire organization for an existing contact. It only checks the pool of users in the routing policy being used. If a matching contact record is not found among those users, a new one is created. This could result in duplicate contacts across the organization (but in different user accounts).

### Lead Stages

The system supports a standard set of lead stages. These stages are not configurable or customizable by customers or TE staff.

### Campaign Builder

There is no association between a campaign and a lead source or routing policy.

### Routing Policies

Due to performance considerations, routing policies are limited to 50 users, even if more are selected as routing targets (teams). (This limit may increase in the future.) If more than 50 are included, the canvas will only show the first 50 and will only consider the truncated list for routing. The system goes in order of user ID, lowest to highest. The 51st user and beyond will not be included in the routing logic.

#### Note

When a lead comes in to be routed, the list of the “top” 50 users is generated at that time. This means any users that have been deactivated or do not have correct permissions are excluded, and the list populates until it finds 50 active, permissioned users.