PREQUO LEAD GENERATOR

RELEASE NOTES

JULY 2020

INTRODUCTION

There have been a number of enhancements to the PreQuo Lead Generator recently, this reference document will give you details of those changes and how to implement them if required.

This document contains information regarding the following new features:

SELF-SERVE ADMINISTRATION

We have added the ability for existing and new iPipeline customers to administer their own version of PreQuo Lead Gen. Allowing you to change any of the text, settings, or style of your system at your convenience.

This removes the requirement for iPipeline to perform these tasks giving you full control of your Lead Gen portal.

If you are interesting in changing your existing Lead Gen portal to a self-serve version please contact your account manager or our customer service team: uk.support@ipipeline.com

CUSTOM FONTS

Many customers have used specific branding and styling on their company websites.

We have now added the facility to apply a custom font to the styling of PreQuo Lead Gen, therefore giving a more seamless customer experience when they navigate from the business website to PreQuo Lead Gen.

The font can be changed by our Professional Services team or if you have taken advantage of the new Self-Serve capability customers are able to control this customization themselves.

CSS Editor

This CSS editor can be used to adjust the typeface used across the site using the following example snippet:

```
body, html {
    font-family: "FONT NAME", sans-serif;
}
```

1

Full implementation details and examples are available upon request.

GDPR AND CONTACT DETAILS BY-PASS

Following recent feedback, for those that utilize our marketing campaign feature in PreQuo Lead Gen, users were often confused or concerned when presented with a screen requesting their contact details before they have input any information to generate a premium after clicking on a link from an advertisement from Social Media or a direct marketing campaign via email.

As a result, we have added some additional parameters to the PreQuo URL enabling the by-pass features.

To implement the by-pass please add *?pass_through* to the end of your URL, for example:
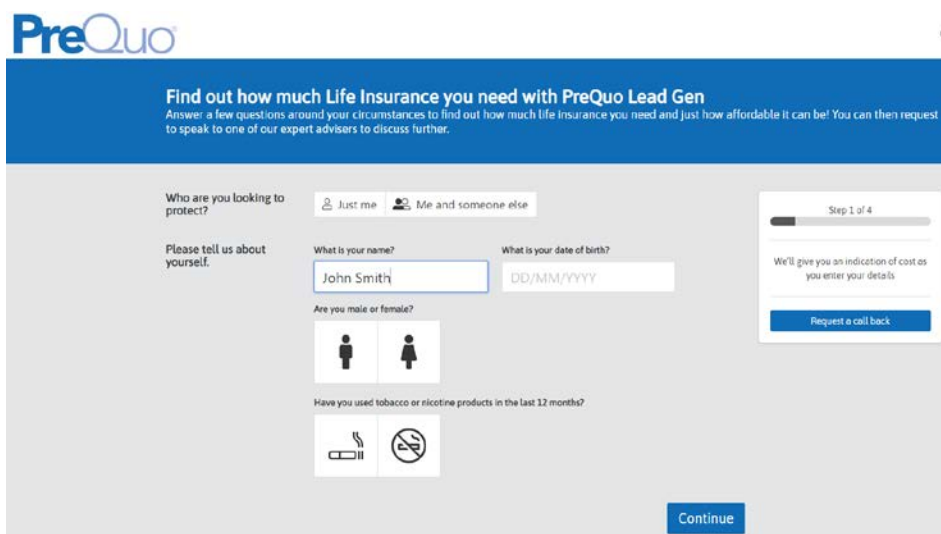
https://YOURPREQUOURL/?pass_through

This will by-pass the following two screens:
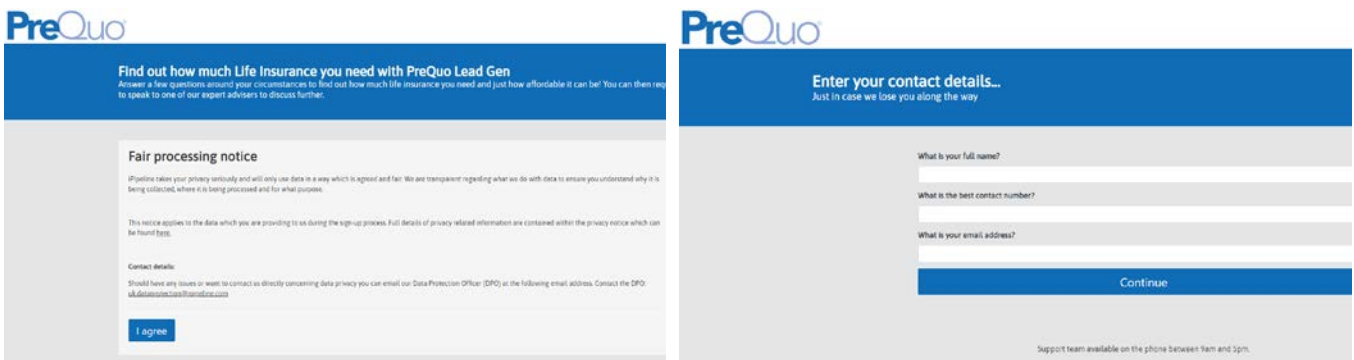
NOTE: As this will skip the GDPR notice screen, it is important that you offer a link to your company's privacy policy in the advertisement used to generate the click through to PreQuo, or within the email sent directly to your target clients to remain GDPR compliant.

The client will land on the main PreQuo input screen:

You can utilize this by-pass option along with the campaign tag in the URL, for example:

https://YOURPREQUOURL/?pass_through&c=FacebookCampaignJuly

This will retain the grouping of campaigns within the PreQuo Admin Dashboard, allowing you to see which campaigns have generated specific leads.

The by-pass setting will remain in the user's browser cache until they manually clear it. Therefore, if you are performing any internal tests on this functionality you may also want to use the *clear_session* parameter to reset the by-pass settings:

https://MYPREQUOURL/?&clear_session#/

DELETE ENQUIRY BUTTON

Administration users will now be able to delete any enquiries from the dashboard using the new Delete button.

Furthermore the "Actions" column has now been moved to the initial column to make it easier to perform any tasks for each enquiry.

Enquiries

Restore Enquiries

Actions	Call Back Reference (If Requested)	Lead Date	Updated Date	Name	Gender	DoB	Smoker?	Has Partner?	Partner Name	Partner Gender	Partner DoB
Delete		2020-07-07 10:49	2020-07-07 10:49				No	No			
Delete		2020-07-07 08:10	2020-07-07 08:10		male	11/11/1991	No	No			
Delete		2020-07-07 08:09	2020-07-07 08:11		male	11/11/1991	No	No			
Delete		2020-07-06 08:52	2020-07-06 08:52		female	01/01/1970	No	No	test est	female	01/01/1970
Delete		2020-07-06 08:51	2020-07-06 08:53		female	01/01/1970	No	No	test est	female	01/01/1970
	X64F	2020	2020	JP Test 7	male	01/01/1970	No	No			

WEBHOOK CRM INTEGRATION

The system can now support the use of webhook data feeds from a CRM or third-party system.

Webhooks are very lightweight form of integration, this allows the enquiry data from PreQuo Lead Gen to be automatically passed through to a CRM or third-party system. Enabling simple automation and can be used to create new client records dynamically and then allocate those records to an Adviser.

Should you require any further information regarding the information above, please contact our customer support team on uk.support@ipipeline.com or call 0345 408 4022.

Regards

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