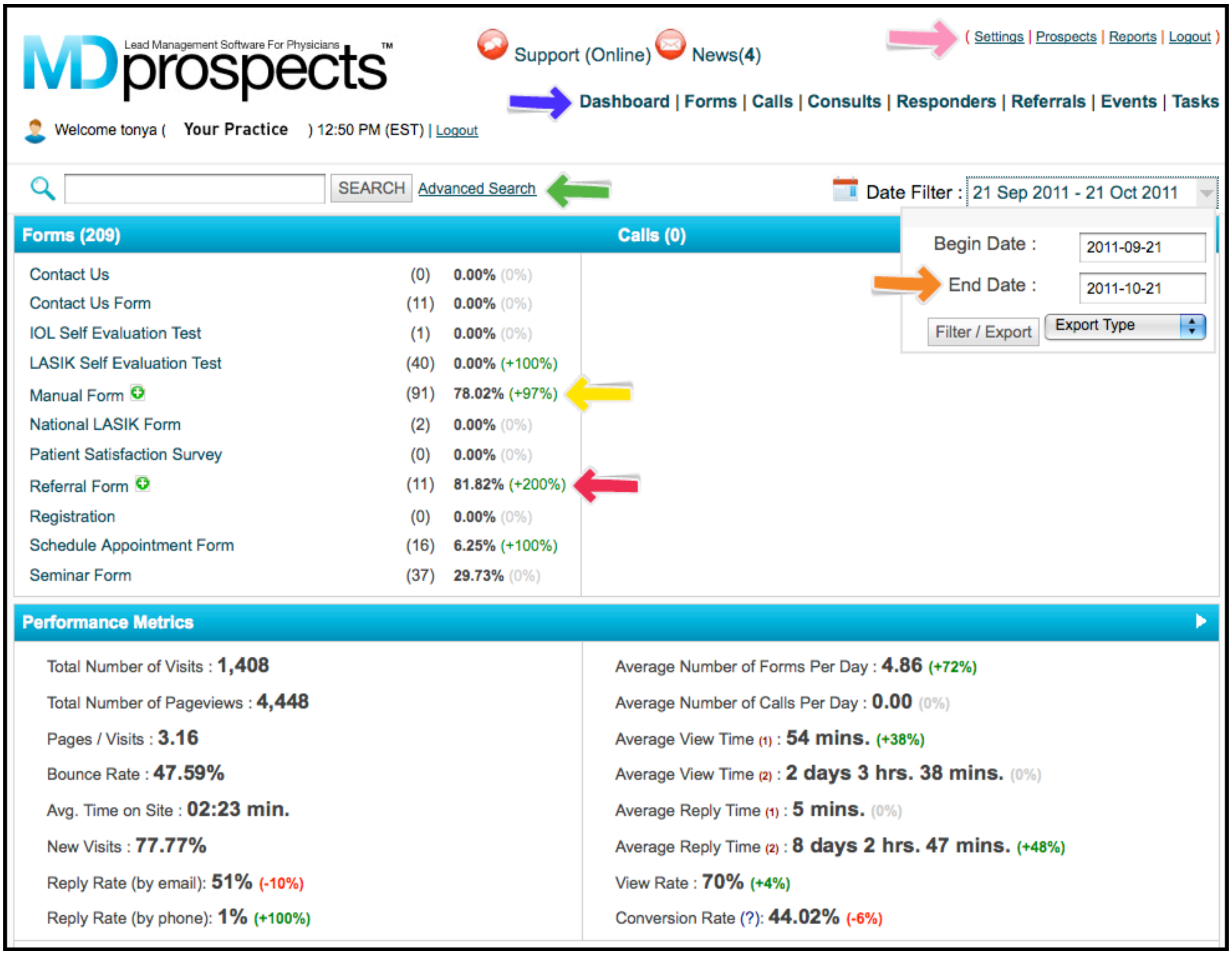
Welcome!

MDprospects is a revolutionary way to manage your Internet leads and maximize your patient conversion rates. Never again will you have to worry about lost opportunities, or feel in the dark about your ROI with Internet marketing. With MDprospects, you can track all email and phone inquires from traditional, organic and PPC campaigns – All in one, easy to use, web based interface. Have the satisfaction of knowing what your advertising is producing and exactly how your investment is paying off.

Logging In:
www.eyeleads.net
Username: usually your first name in lower case or first initial and last name, in all lower case.
Password: As default, your password is set to 123456. This can be changed once you login under Settings → Profile.

DASHBOARD

Once you've logged in, you will be taken to the system's dashboard/summary page.



Date Filter : 21 Sep 2011 - 21 Oct 2011
Begin Date : 2011-09-21
End Date : 2011-10-21

Forms (209) **Calls (0)**

Contact Us	(0)	0.00%	(0%)
Contact Us Form	(11)	0.00%	(0%)
IOL Self Evaluation Test	(1)	0.00%	(0%)
LASIK Self Evaluation Test	(40)	0.00%	(+100%)
Manual Form	(91)	78.02%	(+97%)
National LASIK Form	(2)	0.00%	(0%)
Patient Satisfaction Survey	(0)	0.00%	(0%)
Referral Form	(11)	81.82%	(+200%)
Registration	(0)	0.00%	(0%)
Schedule Appointment Form	(16)	6.25%	(+100%)
Seminar Form	(37)	29.73%	(0%)

Performance Metrics

Total Number of Visits : **1,408**
Total Number of Pageviews : **4,448**
Pages / Visits : **3.16**
Bounce Rate : **47.59%**
Avg. Time on Site : **02:23 min.**
New Visits : **77.77%**
Reply Rate (by email): **51%** (-10%)
Reply Rate (by phone): **1%** (+100%)

Average Number of Forms Per Day : **4.86** (+72%)
Average Number of Calls Per Day : **0.00** (0%)
Average View Time (1) : **54 mins.** (+38%)
Average View Time (2) : **2 days 3 hrs. 38 mins.** (0%)
Average Reply Time (1) : **5 mins.** (0%)
Average Reply Time (2) : **8 days 2 hrs. 47 mins.** (+48%)
View Rate : **70%** (+4%)
Conversion Rate (?): **44.02%** (-6%)

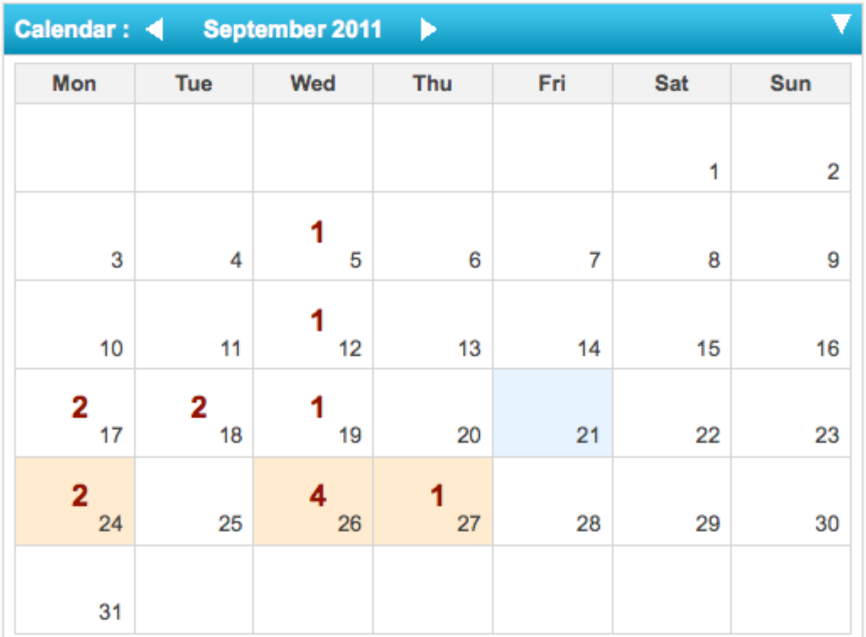
The top, pink arrow, points to where you can find the *Settings*, a cumulative prospects list with emails, access *Reports* (client admin only), and *Logout.* The blue arrow shows the feature navigation bar. The green arrow points to where you can search. There are two types of "Search". First, the lead *Search*, where you simply enter a first **OR** last name in the search box to find an existing lead; second, the *Advanced Search* is a reporting feature that allows you to filter out specific data captured in the FORMS section. See the section titled *Advanced Search* to learn about filtering data and some examples when you'd use this search feature.

To the right, the orange arrow points to the **Date Filter** where you can select a specific date range to be shown. By default, all data on the Dashboard and in the system, shows activity from the past 30 days; you will also find the **export option** here. Choose your date range, export type and then click Filter/Export.

The next section on the Dashboard breaks down traffic and leads from the forms on your website. You'll also see the option here to manually enter leads from outside sources, i.e. phone inquires, doctor referrals, walk-ins, etc. **There are two ways to manually enter leads**, the first (yellow arrow) is the generic Manual Form – simply click on the green addition sign and fill in the fields you're able to gather from the initial contact with the lead. The second is the "Referral Form", where you can attach leads to their referring doctors. If you do not see the referring doctor's name listed, this will need to be added to the referral database in the REFERRALS section. **If the lead is not a referral, always use the manual form.**

Dashboard Calendar

You are able to create "tasks" and "reminders" for leads in MDprospects. How to do so will be covered in the *Lead Detail* section below. On the DASHBOARD, the calendar will display the number of reminders for each day. These reminders can also be sent to your email inbox.

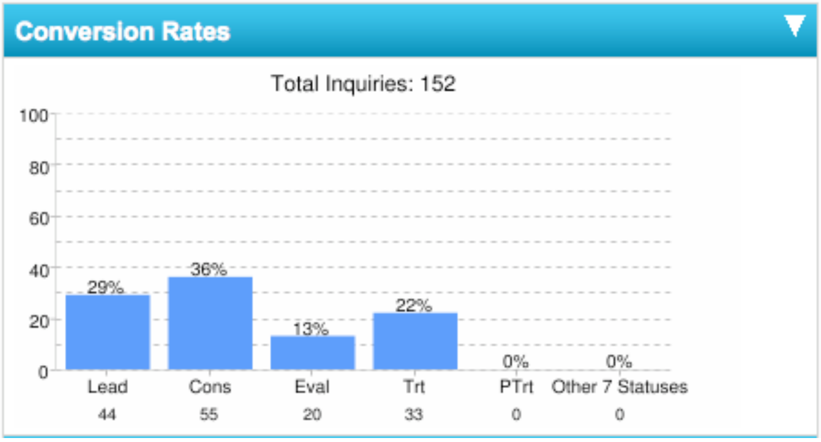


Mon	Tue	Wed	Thu	Fri	Sat	Sun
					1	2
3	4	1 5	6	7	8	9
10	11	1 12	13	14	15	16
2 17	2 18	1 19	20	21	22	23
2 24	25	4 26	1 27	28	29	30
31						

Graphs

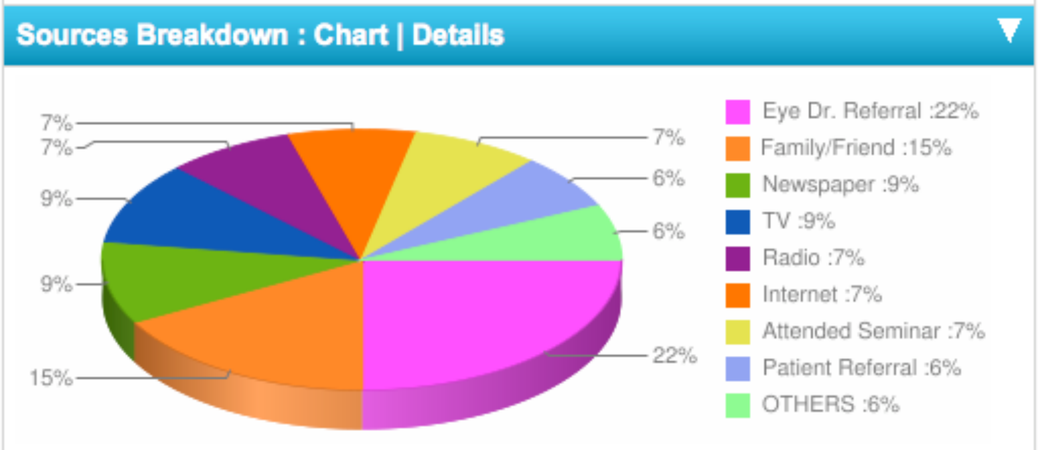
There are several graphs on the Dashboard that report in "real time". Remember that all of the data used for these graphs is from the last 30 days, the default time frame. You can change the data set shown by changing the date filter at the top right of each screen in MDprospects.

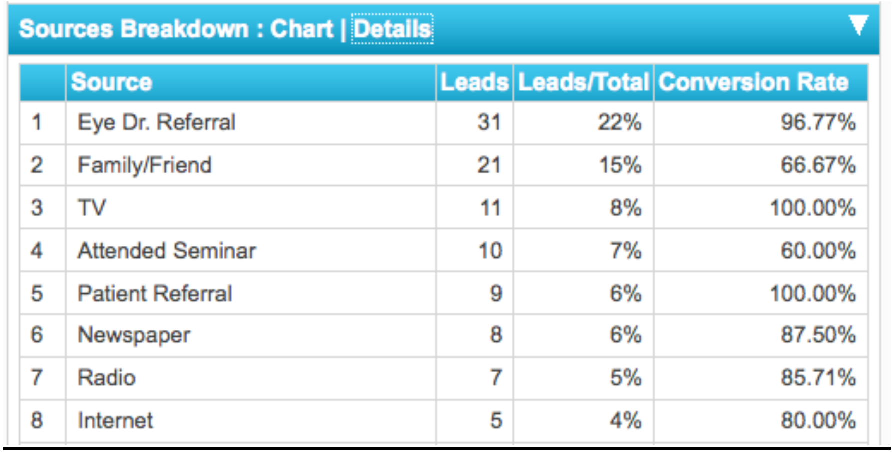
The conversion rate graph shows where each lead is in the sales cycle. In the example shown below, there are 152 total inquires: 44 (or 29% of all leads) are still in "lead" status; 55 (36%) have moved onto "consultation"; 20 (13%) to "evaluation"; and 33 (22%) are scheduled for a procedure.



The statuses of leads are changed in the FORMS section. To ensure accuracy of this graph and other reports, **it is crucial that statuses are continually updated as the lead moves forward in the sales cycle.**

Another important graph is the "Sources Breakdown" graph. Here we're able to track where your leads have come from, or *how they've heard about you*. During the set up process, you will be asked for a list of sources, i.e.: Doctor Referral, Radio Ad, Billboard, etc. All leads received by MDprospects can have an affiliated "Source". This way, you're able to easily see what advertising and marketing efforts have the biggest return and what works best in generating leads. Furthermore, you can assess the quality of the leads generated by looking at the campaign conversion rates.



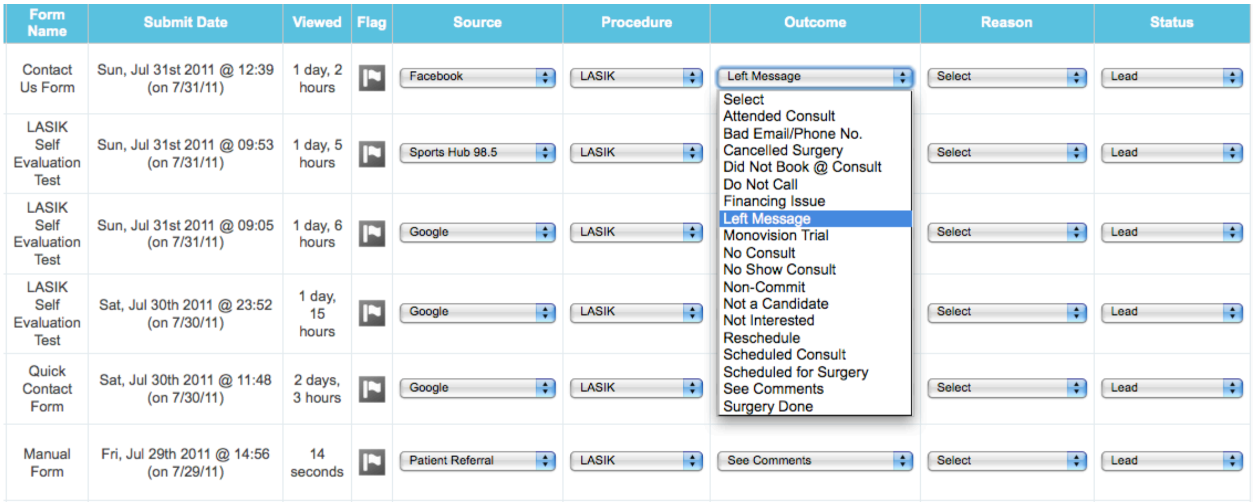


Sources Breakdown : Chart | Details

	Source	Leads	Leads/Total	Conversion Rate
1	Eye Dr. Referral	31	22%	96.77%
2	Family/Friend	21	15%	66.67%
3	TV	11	8%	100.00%
4	Attended Seminar	10	7%	60.00%
5	Patient Referral	9	6%	100.00%
6	Newspaper	8	6%	87.50%
7	Radio	7	5%	85.71%
8	Internet	5	4%	80.00%

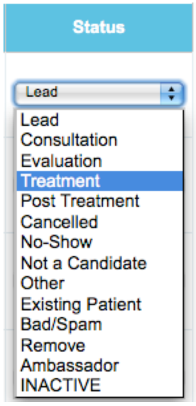
FORMS

Once a lead is received, either from the website or by manual entry, it is listed in the FORMS section newest to oldest. The icon on the left will show an orange folder and the new leads will be in bold (Icon Key is below). The Form Name column will display which form on the website the lead is from or if it is a Manual entry. The Submit Date will show the date and time the lead was received by the system and if the lead has been "viewed" will be shown in the fourth column. The remaining columns are customized columns for your practice and you can select appropriate options per lead. To the far right is the **Status column**, which will be updated manually and continually as the lead moves through the sales cycle. By default, all new inquiries are in "lead" status. Below are some examples of columns used by practices. You can add to or edit columns at any time



Form Name	Submit Date	Viewed	Flag	Source	Procedure	Outcome	Reason	Status
Contact Us Form	Sun, Jul 31st 2011 @ 12:39 (on 7/31/11)	1 day, 2 hours	⚑	Facebook	LASIK	Left Message	Select	Lead
LASIK Self Evaluation Test	Sun, Jul 31st 2011 @ 09:53 (on 7/31/11)	1 day, 5 hours	⚑	Sports Hub 98.5	LASIK		Select	Lead
LASIK Self Evaluation Test	Sun, Jul 31st 2011 @ 09:05 (on 7/31/11)	1 day, 6 hours	⚑	Google	LASIK		Select	Lead
LASIK Self Evaluation Test	Sat, Jul 30th 2011 @ 23:52 (on 7/30/11)	1 day, 15 hours	⚑	Google	LASIK		Select	Lead
Quick Contact Form	Sat, Jul 30th 2011 @ 11:48 (on 7/30/11)	2 days, 3 hours	⚑	Google	LASIK		Select	Lead
Manual Form	Fri, Jul 29th 2011 @ 14:56 (on 7/29/11)	14 seconds	⚑	Patient Referral	LASIK	See Comments	Select	Lead

To the right, are the options listed under the Status column. Again the accuracy of the reporting depends on the accuracy and consistency of its upkeep.



ICON KEY

📂	**Unopened/New Lead**
💬	**User has entered a comment(s)**
☎	**Lead has been called**
✉✗	**Invalid Email Address**
✉	**Opened Lead**
a	**Lead has been referred**
📨	**Reply has been sent and read**
📩	**Reply has been sent but not read**
📋	**Task has been entered by user**

Viewing A Lead – Lead Detail

When you click on a lead, it opens the *Lead Detail Screen* where there are several tabs.

Info: Here, the information displayed is what the lead entered in an online form, or the information entered by a user into the manual form.

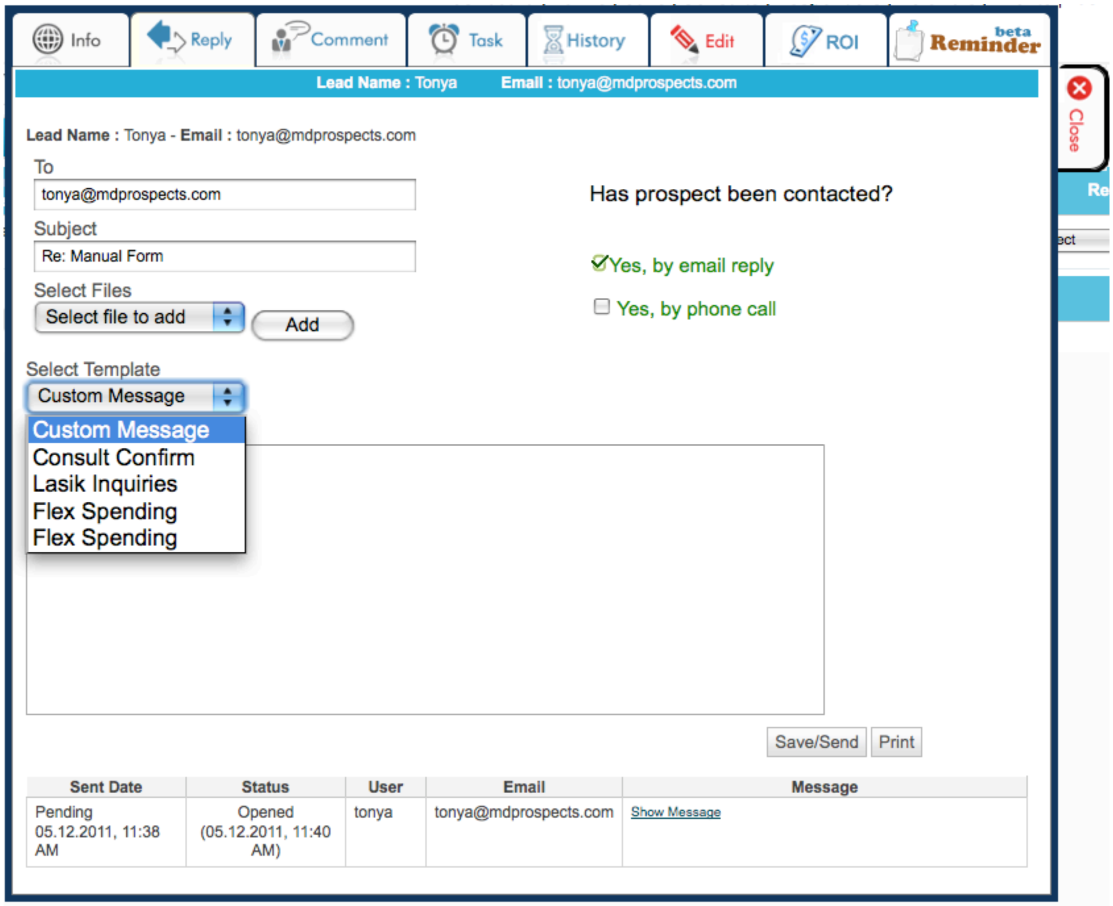
Reply: To reply to the lead via email, simply type your response in the "Message" box and click Save/Send. Below it will log of all outgoing emails, the user who sent them, and if they've been delivered. Additionally, you have the option to *Select Template*, a canned response that has been saved. This can save time if you have replies that are commonly used. You also have the option to *Select Files*, allowing you to attach a PDF file (Patient Forms) to an outgoing email. (Reply tab is shown in the picture below)

Comment: Each user can add any comments or notes regarding each lead. This can be used to keep an internal dialogue all users can see.

Task: To create a follow up reminder or "task" for the lead, type the details in the message box. For example: Call Sally, or Send Sally more information, or Remind Sally she is due for filler. Additionally, all tasks and those they are assigned to, can be viewed in a list under the TASKS tab.

History: The History tab is where to find a complete log of activities including all changes that have been made to category columns, sent replies and responders, and updates performed by each user.

Edit: Add to, or edit any information. Please note: You are able to attach each lead to a referrer here as well. Once the referrer names are added in the **REFERRALS** section, they will be available in a drop down list in the Edit tab.



Lead Name : Tonya **Email :** tonya@mdprospects.com

Lead Name : Tonya - **Email :** tonya@mdprospects.com

To
tonya@mdprospects.com

Subject
Re: Manual Form

Select Files

Select Template
Custom Message

- Custom Message
- Consult Confirm
- Lasik Inquiries
- Flex Spending
- Flex Spending

Has prospect been contacted?

☑ Yes, by email reply

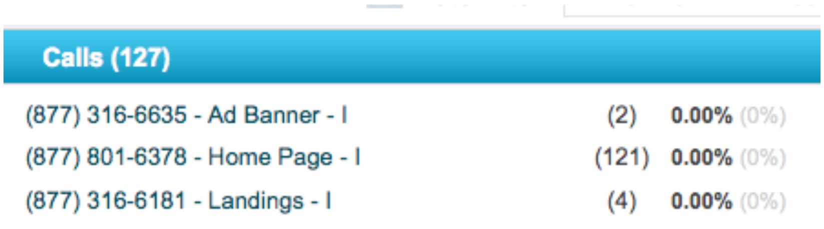
☐ Yes, by phone call

Sent Date	Status	User	Email	Message
Pending 05.12.2011, 11:38 AM	Opened (05.12.2011, 11:40 AM)	tonya	tonya@mdprospects.com	Show Message

CALLS

Call Tracking enables you to obtain detailed reporting and to evaluate marketing effectiveness of specific advertising campaigns, websites and landing pages. By setting up unique 800 numbers, it is easy to gauge the amount of traffic generated by each campaign or web page. You can have as many tracking numbers as you wish and they can be recycled.

In the DASHBOARD section, to the right of the forms, under *Calls*, is a list of phone numbers and their designated campaigns. The number of calls generated by each phone number is displayed on the right in parenthesis.



Calls (127)

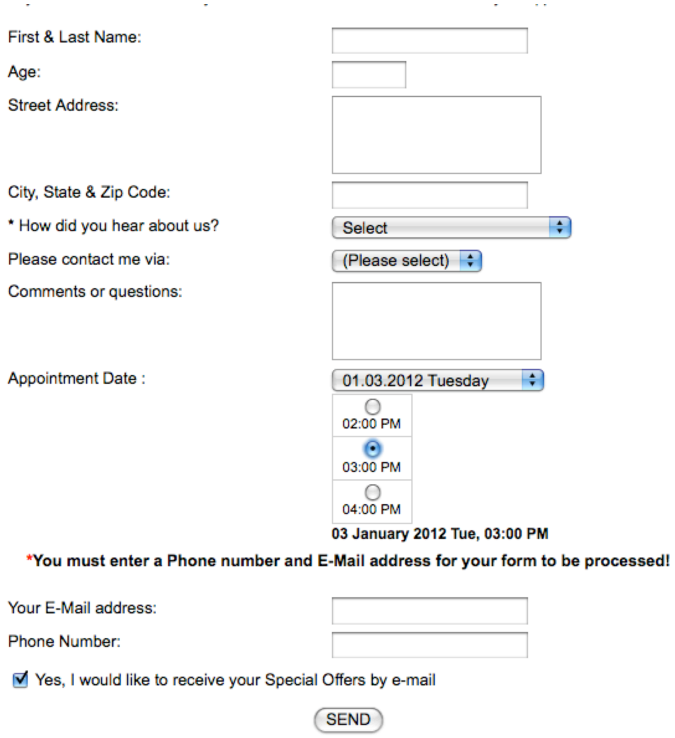
(877) 316-6635 - Ad Banner - I	(2)	0.00%	(0%)
(877) 801-6378 - Home Page - I	(121)	0.00%	(0%)
(877) 316-6181 - Landings - I	(4)	0.00%	(0%)

The calls are available in list format in the CALLS tab with the following columns: Date of the call, Name (if reverse look up is activated), lead's phone number (caller id), Ad Source (designated campaign), Call Type, Call Action and Call Duration. In addition, you are able to listen to each call (additional feature) and click on the date to enter the *Lead Detail Screen*, similar to the FORMS section.

If Call Tracking was not activated during setup, you can obtain numbers at any time by contacting customer service; contact info is on the last page of this manual.

CONSULTS

MDprospects' *Consult* feature allows web visitors to schedule an appointment by using a form on your website. If you do not have an existing contact or appointment form, we can add this for you. Here is an example of what an Appointment Form looks like.



First & Last Name:
Age:
Street Address:
City, State & Zip Code:
* How did you hear about us? Select
Please contact me via: (Please select)
Comments or questions:
Appointment Date : 01.03.2012 Tuesday
○ 02:00 PM
● 03:00 PM
○ 04:00 PM
03 January 2012 Tue, 03:00 PM

*You must enter a Phone number and E-Mail address for your form to be processed!

Your E-Mail address:
Phone Number:
☑ Yes, I would like to receive your Special Offers by e-mail

You control the dates and times available for online appointments in the *Settings* section of the CONSULT tab. You can even display different schedules by location or by doctor.

Choosing Your Settings

Once you're in the Consults section of MDprospects, click on the Settings button. In the left panel are several options:

1.) Display Hours – What are the hours your office is open?
2.) Apply schedule universally or individually – If you want the same schedule every week, click the *Apply schedule universally* button and the schedule you have chosen will automatically display every week. If the online schedule will vary week to week, click the *Apply schedule*

individually. **Remember, if you choose the second option, you must update your schedule regularly or dates will not be shown on the website.**

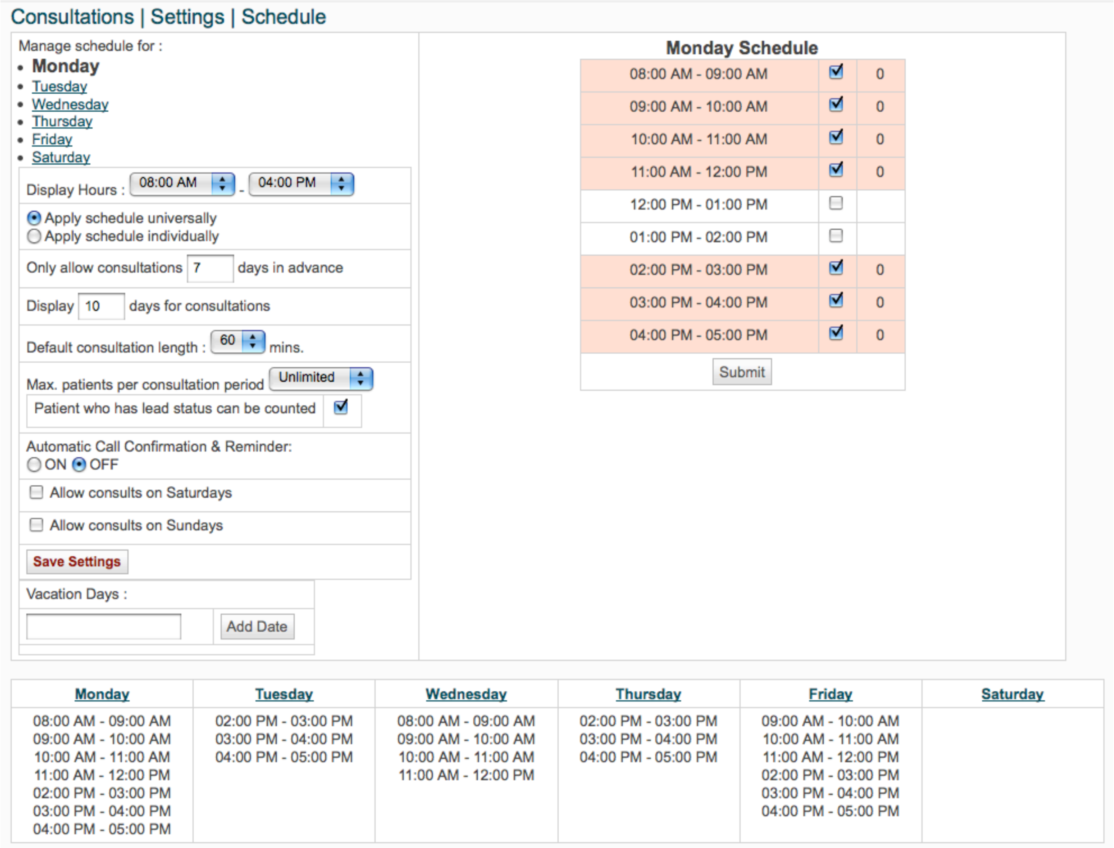
3.) Only allow consultations _____ days in advance – How many days before the appointment do you want to allow people to schedule.
4.) Default consultation length: ______ mins – Select how long you block off for appointments.
5.) Automatic Call Confirmation & Reminder – Selecting this feature will trigger an automated phone call to each person who has booked to confirm his/her selection.

Always SAVE your settings!

Creating the Schedule

Once you have selected your settings, you can create the schedule. If you selected *Apply schedule universally*, click on the day of the week in the left panel and select the time slots available, in the right panel. Note that the default time slots are for one hour, so if you want to display 8:30, click the 8:00 AM - 9:00 AM button, and then select the 8:30 button. You can select as many time slots as needed for each day. **Click Submit to save these times.** Do this for each day. The schedule you've selected will be shown in the bottom panel.

If you selected *Apply schedule individually*, choose the days from the calendar in the left panel, and choose time slots in the right panel. **Click Submit to save these times.** The days you've scheduled will be listed on the right hand side.



Manage schedule for :
- **Monday**
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Display Hours : 08:00 AM - 04:00 PM

● Apply schedule universally
○ Apply schedule individually

Only allow consultations 7 days in advance

Display 10 days for consultations

Default consultation length : 60 mins.

Max. patients per consultation period Unlimited

Patient who has lead status can be counted ☑

Automatic Call Confirmation & Reminder:
○ ON ● OFF

☐ Allow consults on Saturdays

☐ Allow consults on Sundays

Vacation Days :

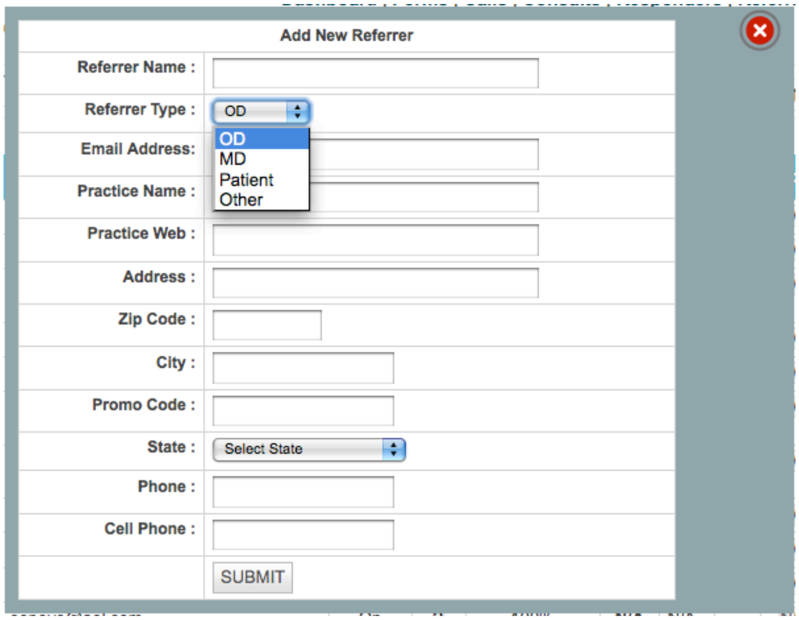
Monday Schedule

08:00 AM - 09:00 AM	☑	0
09:00 AM - 10:00 AM	☑	0
10:00 AM - 11:00 AM	☑	0
11:00 AM - 12:00 PM	☑	0
12:00 PM - 01:00 PM	☐	
01:00 PM - 02:00 PM	☐	
02:00 PM - 03:00 PM	☑	0
03:00 PM - 04:00 PM	☑	0
04:00 PM - 05:00 PM	☑	0

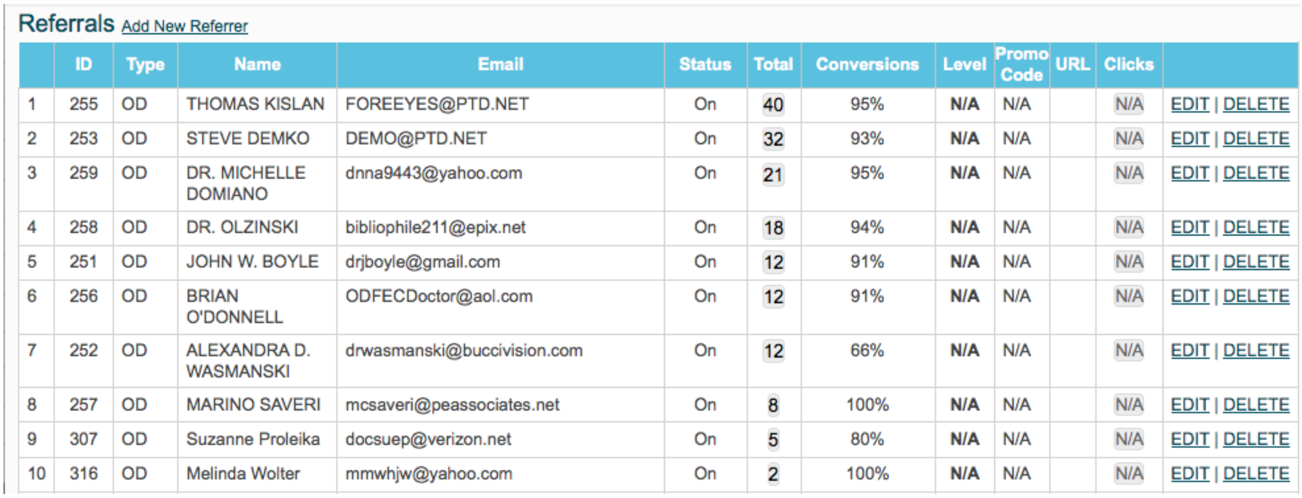
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
08:00 AM - 09:00 AM 09:00 AM - 10:00 AM 10:00 AM - 11:00 AM 11:00 AM - 12:00 PM 02:00 PM - 03:00 PM 03:00 PM - 04:00 PM 04:00 PM - 05:00 PM	02:00 PM - 03:00 PM 03:00 PM - 04:00 PM 04:00 PM - 05:00 PM	08:00 AM - 09:00 AM 09:00 AM - 10:00 AM 10:00 AM - 11:00 AM 11:00 AM - 12:00 PM	02:00 PM - 03:00 PM 03:00 PM - 04:00 PM 04:00 PM - 05:00 PM	09:00 AM - 10:00 AM 10:00 AM - 11:00 AM 11:00 AM - 12:00 PM 02:00 PM - 03:00 PM 03:00 PM - 04:00 PM 04:00 PM - 05:00 PM	

REFERRALS

As mentioned previously, you are able to keep a list of doctors and existing patients who refer new patients to your practice. Once in the REFERRALS tab, click *Add New Referrer* and enter the referrer's information.



An Ongoing *Referral Report* is also available under the REFERRAL tab, with total referrals and their conversion rates. When you click on a number in the *Total* column, it brings you to the list of referred patients with options to print.


Referrals Add New Referrer

	ID	Type	Name	Email	Status	Total	Conversions	Level	Promo Code	URL	Clicks	
1	255	OD	THOMAS KISLAN	FOREEYES@PTD.NET	On	40	95%	N/A	N/A		N/A	EDIT | DELETE
2	253	OD	STEVE DEMKO	DEMO@PTD.NET	On	32	93%	N/A	N/A		N/A	EDIT | DELETE
3	259	OD	DR. MICHELLE DOMIANO	dnna9443@yahoo.com	On	21	95%	N/A	N/A		N/A	EDIT | DELETE
4	258	OD	DR. OLZINSKI	bibliophile211@epix.net	On	18	94%	N/A	N/A		N/A	EDIT | DELETE
5	251	OD	JOHN W. BOYLE	drjboyle@gmail.com	On	12	91%	N/A	N/A		N/A	EDIT | DELETE
6	256	OD	BRIAN O'DONNELL	ODFECDoctor@aol.com	On	12	91%	N/A	N/A		N/A	EDIT | DELETE
7	252	OD	ALEXANDRA D. WASMANSKI	drwasmanski@buccivision.com	On	12	66%	N/A	N/A		N/A	EDIT | DELETE
8	257	OD	MARINO SAVERI	mcsaveri@peassociates.net	On	8	100%	N/A	N/A		N/A	EDIT | DELETE
9	307	OD	Suzanne Proleika	docsuep@verizon.net	On	5	80%	N/A	N/A		N/A	EDIT | DELETE
10	316	OD	Melinda Wolter	mmwhjw@yahoo.com	On	2	100%	N/A	N/A		N/A	EDIT | DELETE

EVENTS/SEMINARS

All data from the seminars your practice hosts is housed in the Events tab of MDprospects. When people register for upcoming seminars on your website, the leads are received into MDprospects just like those who have come from any other form or those who have been manually entered – In the FORMS section. When you click on the EVENTS tab, you'll see the Events Dashboard with a small navigation bar: Seminar Home (the Dashboard), Leads, Seminars, and Locations.

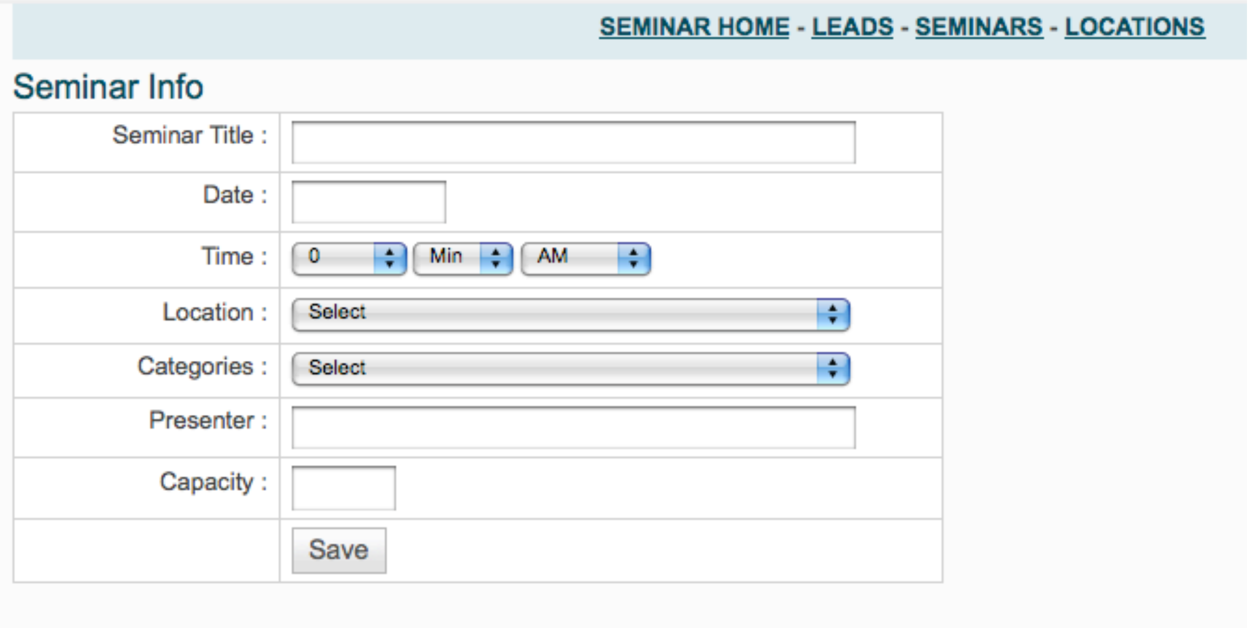
Listed at the bottom of the Events Dashboard are upcoming seminars, number of registrants and a "roster" for each. Here, the leads are grouped by which seminar they've registered for. To view the roster for any seminar, click View. At the top of the Events Dashboard are graphs detailing the total registrants and history of all seminars.

Leads

Clicking on the *Leads* button in the navigation bar brings you to a full list of all registrants, their contact info, their seminar status (whether they've attended), and the option to edit any information received. Above the list is the option to *Add New Lead*. Anyone can be added here who contacts your practice and wishes to attend a seminar but has not filled out the online registration.

Seminars

Clicking on the Seminars button in the navigation bar brings you to a full list of seminars, past, present and upcoming. Here, you can view the scheduled dates and times of the seminars, the rosters and have the option to edit seminar information. Above the list is the option to *Add New Seminar*. To add to the list of upcoming seminars, click *Add New Seminar* and fill out the form provided.



Locations

Before you add a seminar, you must designate a location for it. To add a location, click *Add New Location* and enter the building, address, and phone number where the seminar will be held. All locations entered will be saved for future use. It is beneficial to add all possible locations during the set up process of MDprospects.

If your practice currently hosts weekly/monthly seminars, but does not currently allow for online registration, contact customer service and this can be added for you.

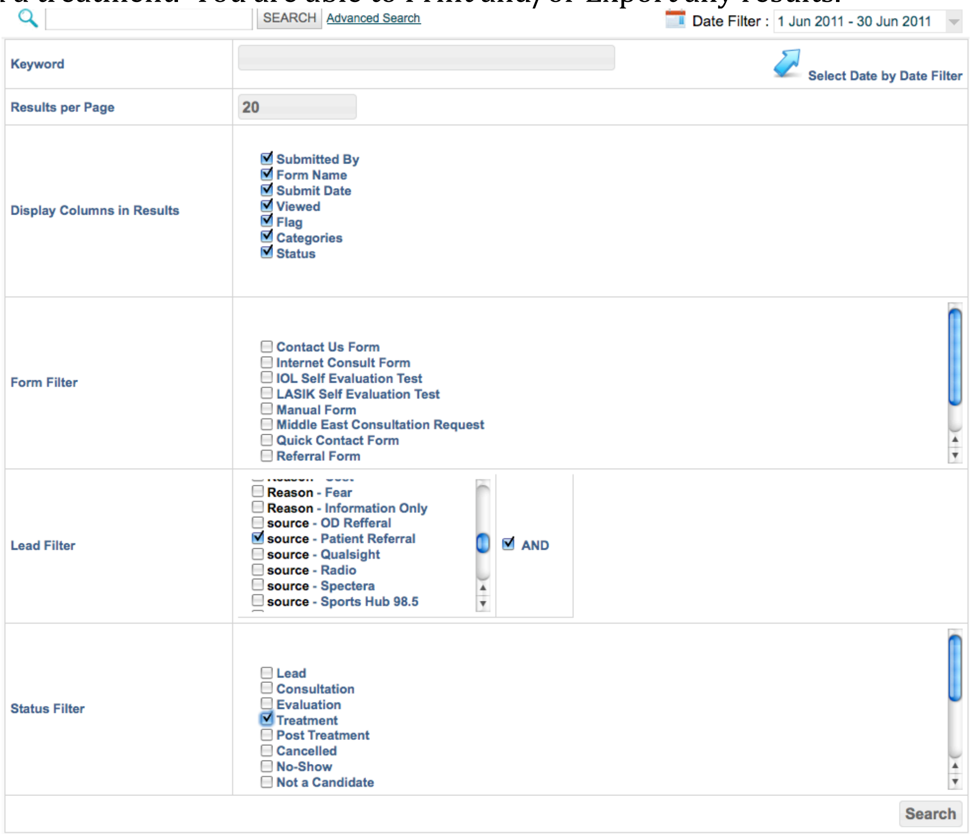
ADVANCED SEARCH

Advanced search allows you to filter out any of the data captured in the columns in the FORMS section of MDprospects. This is a major benefit of creating the customized columns explained in the FORMS section of this manual.

Executing a Search

1. Click on Advanced Search, to the right of the search box.
2. Select a time frame: From the Date Filter box, choose your desired dates and click the box Filter/Export.
3. Select Form Filter: If you wish to include data from ALL forms, do not select a particular form in the Form Filter column.
4. Select Lead Filter(s): Choose which columns fields you wish to filter. Example: How many LASIK leads were patient referrals? Select the box, Procedure – LASIK and the box, Source – Patient Referral.
5. Select Status Filter: If you want to display ALL LASIK patient referrals, do not choose a status. If you want to know how many LASIK leads were a referral AND converted to treatment, select the *Treatment* box.
6. Click Search.

The data set shown will group the leads that were interested in LASIK, referred by another patient and completed a treatment. You are able to Print and/or Export any results.



Date Filter : 1 Jun 2011 - 30 Jun 2011

Keyword	
Results per Page	20
Display Columns in Results	☑ Submitted By ☑ Form Name ☑ Submit Date ☑ Viewed ☑ Flag ☑ Categories ☑ Status
Form Filter	☐ Contact Us Form ☐ Internet Consult Form ☐ IOL Self Evaluation Test ☐ LASIK Self Evaluation Test ☐ Manual Form ☐ Middle East Consultation Request ☐ Quick Contact Form ☐ Referral Form
Lead Filter	☐ Reason - Fear ☐ Reason - Information Only ☐ source - OD Refferal ☑ source - Patient Referral ☐ source - Qualsight ☐ source - Radio ☐ source - Spectera ☐ source - Sports Hub 98.5 ☑ AND
Status Filter	☐ Lead ☐ Consultation ☐ Evaluation ☑ Treatment ☐ Post Treatment ☐ Cancelled ☐ No-Show ☐ Not a Candidate

Contact Tonya in Customer Service
Phone: 207-464-0283
Email: tonya@mdprospects.com
Online Chat: Click on “Support” button in MDprospects