📝 Managing Your Credit Orders

Follow the steps below to manage your centralized credit orders.

Important note: If you are new to the CLD program, you will need to activate your order(s) to start receiving leads. Your order(s) will automatically activate after 2 weeks if no action is taken. For more information, please see Step 8.

1. Navigate to the *CLD* tab.

2. The orders you requested during enrollment were automatically uploaded and will appear in your account. If you had a previous web lead order (from Q2 or Q3 enrollment) your order will begin delivering leads with your prior configurations. If not, they will be set up with the default order settings noted below.

Default Order Settings

Centralized Lead Auto Credit
>   Daily cap: 10
>   Territory: 90 miles around your office zip code
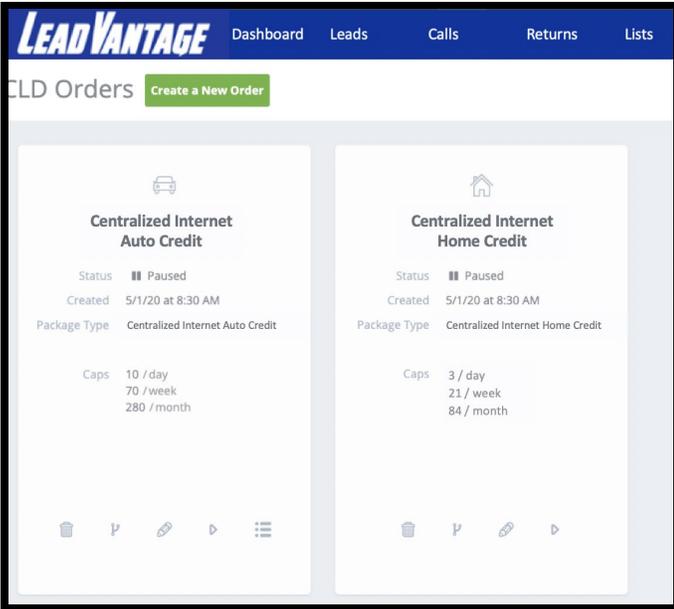>   Schedule: Monday - Friday, 9am - 5pm

Centralized Lead Home Credit
>   Daily cap: 3
>   Territory: 90 miles around your office zip code
>   Schedule: Monday - Friday, 9am - 5pm

Centralized Transfer Auto Credit
>   Daily cap: 5
>   Territory: 90 miles around your office zip code
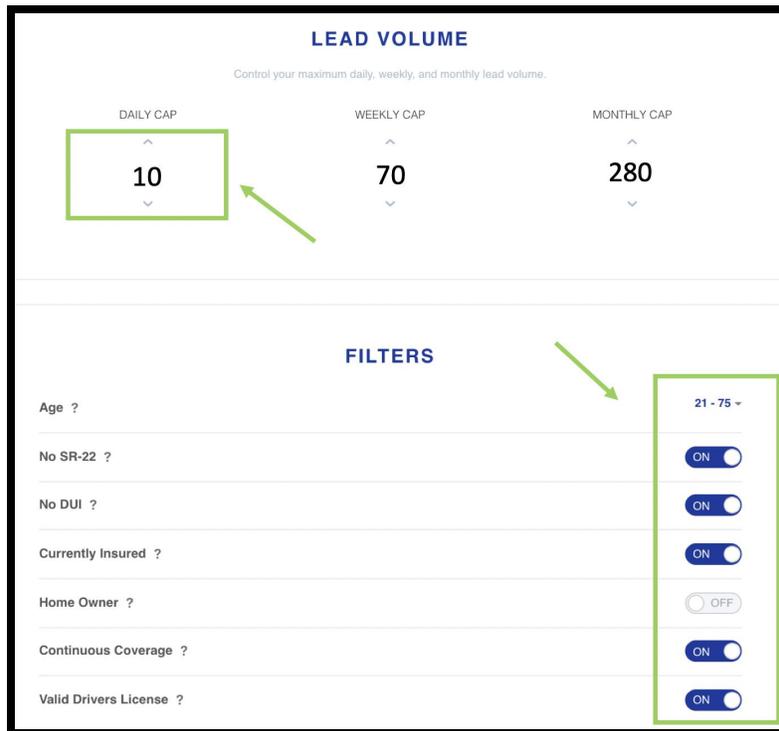>   Schedule: Monday - Friday, 9am - 5pm
>   **Note:** If you signed up for **Centralized Transfer Auto Credit,** the number that will show on caller ID when calls are being transferred to you is: (847) 262-4800.

3. If you wish to make changes, click the *Pencil* icon to edit the order(s) settings.

Questions? Contact LeadVantage Customer Service:
(855) 317 - 4233
support@allstateleadvantage.com
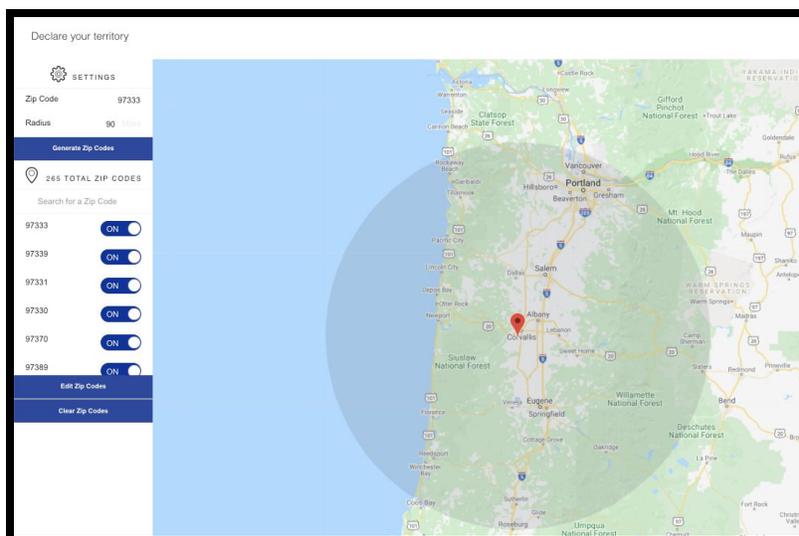Monday – Friday, 6:30 AM – 4:00 PM PST

1

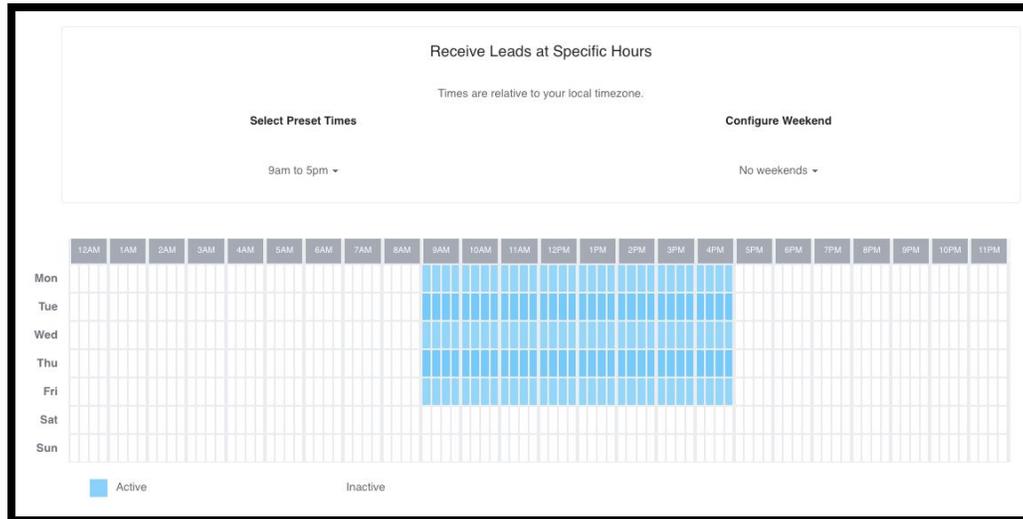4. On the next page, you are able to edit your daily cap and filters.

*screenshot is from a Centralized Auto Credit Order

5. Next, click the *Territory* tab to make any adjustments to your territory. We recommend at least a 90 mile radius or 25+ zip codes.

Note: If you use the radius tool, the system will automatically filter out zip codes from outside your state. However, if you manually enter zip codes, the system will not automatically detect and remove out of state zips.

**Questions? Contact LeadVantage Customer Service:**
(855) 317 - 4233
support@allstateleadvantage.com
Monday – Friday, 6:30 AM – 4:00 PM PST

2

6. Click the *Schedule* tab to make any adjustments to your delivery schedule.

7. Your Lead Manager Account ID will automatically be imported, so you do not need to input this on the *Delivery* tab. When finished, simply click *Save & Exit* in the top right corner. **Pro tip!** Go into Lead Manager to assign your leads, organize with folders and set up workflows.

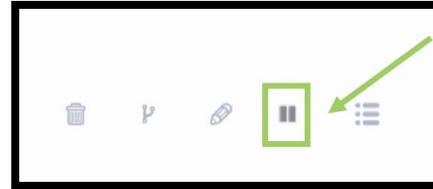**8.** Next, you will be redirected back to the *CLD* page.

Reminder: If you are new to the CLD program, you will need to click the *Play* icon to activate the order. Your order will automatically activate after 2 weeks if no action is taken.
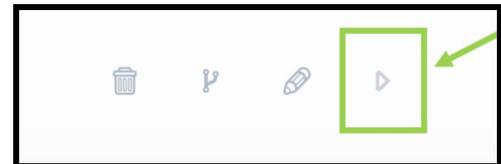
9. Repeat the process for any other CLD Credit orders as desired.

⏸/▶ Pausing Your Orders

1. Click the *Pause* icon for the order you would like to pause.

2. Specify the reactivation date and reason for pausing, then click "Pause Order."

   Note: To pause an order longer than 7 days, please call us at (855) 317 - 4233.

💳 Tracking Your Funds

1. Navigate to the Promotions tab.

2. Locate the campaign titled CLD Credit Based Offer. This will show the funds used and available.

Promotion Name / Description	Budget Used	Available Budget
CLD Credit Based Offer Funding for CLD credit based offer.	$0.00	$3,000.00