Velocify Pulse®

User Guide | 18.2 Release

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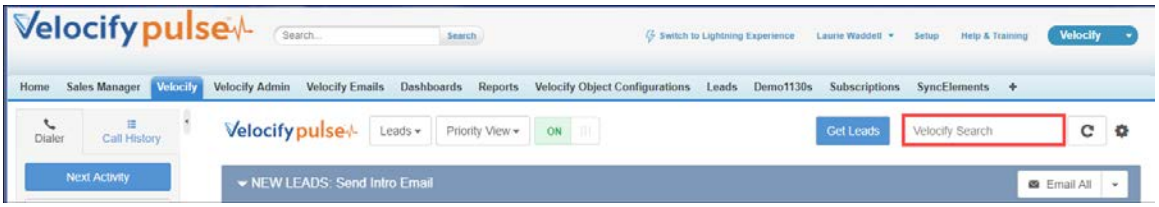
Velocify™ by EllieMae®

Contents

New Pulse Search

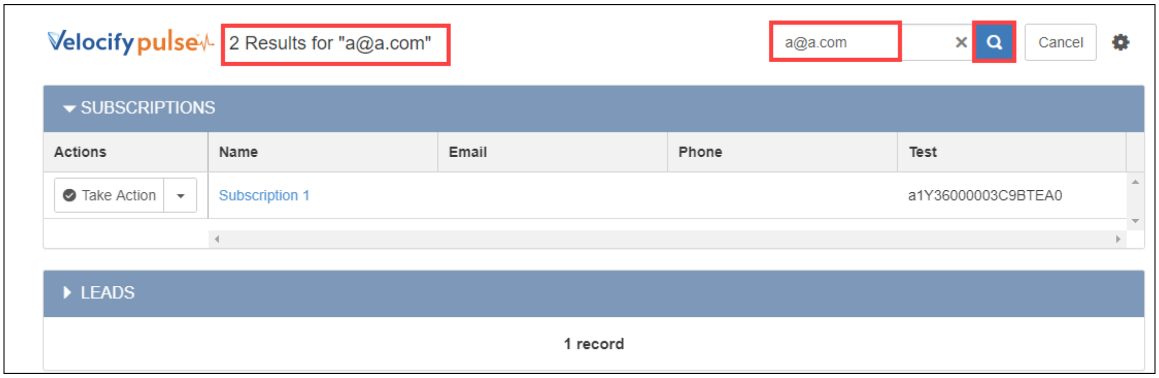
Use the new Velocify Search feature to look for a record within the Pulse tab. This feature supports the workflow between Inbound and Outbound prospecting activities by displaying searched records in the Velocify Pulse View. This provides the ability to view the Insight Pane for contextual information, and Take Action on searched records as appropriate.

NOTE*: Your search results display the top ten records for the objects managed within Velocify.*



How to Search by Email Address

1. Click inside the Velocify Search field.
2. Type your search criteria, and click the **Search** icon.
    - You can search for any Salesforce field value. The example below illustrates searching for an email address.



    - The top part of the page displays the number of records that match your search.
      NOTE: A maximum of 10 search results are displayed per Velocify managed object based on the most recent activity.
3. View the results displayed on the page.
4. Click each result to view more details and/or take action on the record.
5. Click the **Cancel** button next to the Velocify Search field to return to your Priority View.

Pull Distribution

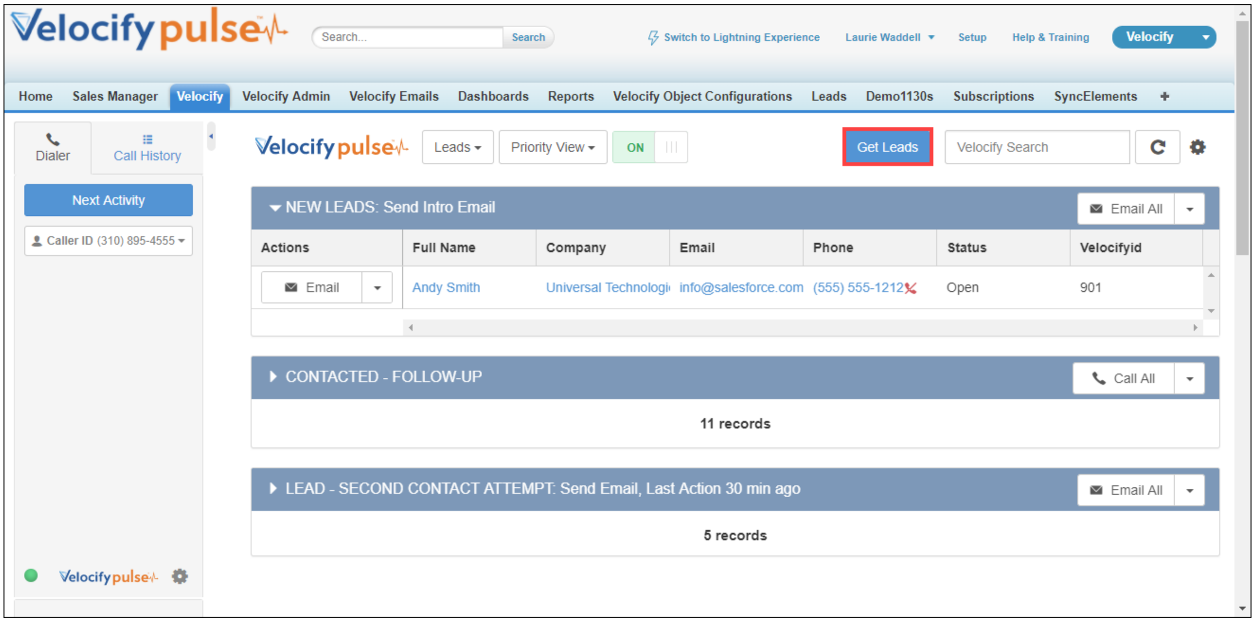
Use this feature to self-assign records in Pulse. The following two types of pull distribution are available with this release:

- Pull Preview: This enables you to view and choose the Leads you want to pursue.
- Pull Blind: You will be assigned Leads from the defined Distribution Program; you do not have the option to view the lead before it is assigned to you.

Once you Take Lead from Pull Distribution, the newly assigned Leads will appear in your Priority View

Pull Blind/New **Get Leads** Button

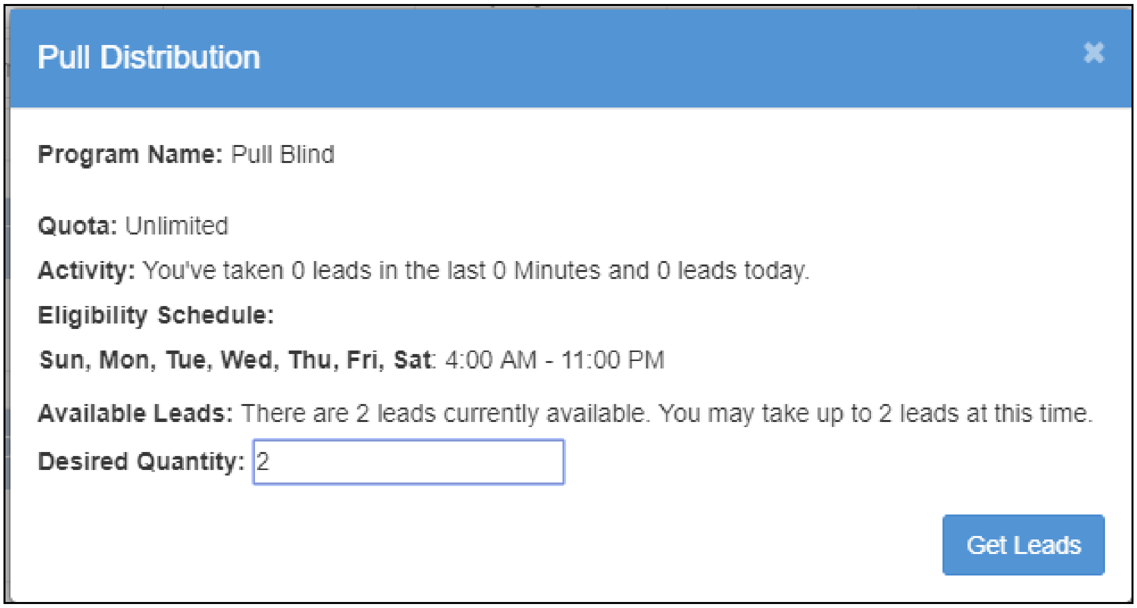
To support the Pull Blind feature, a new **Get Leads** button has been added to the Leads module.



NOTE*: Your Velocify administrator pre-defines the number of leads available to you and the maximum number of leads that you can assign to yourself.*

How to Pull Blind/Get Leads

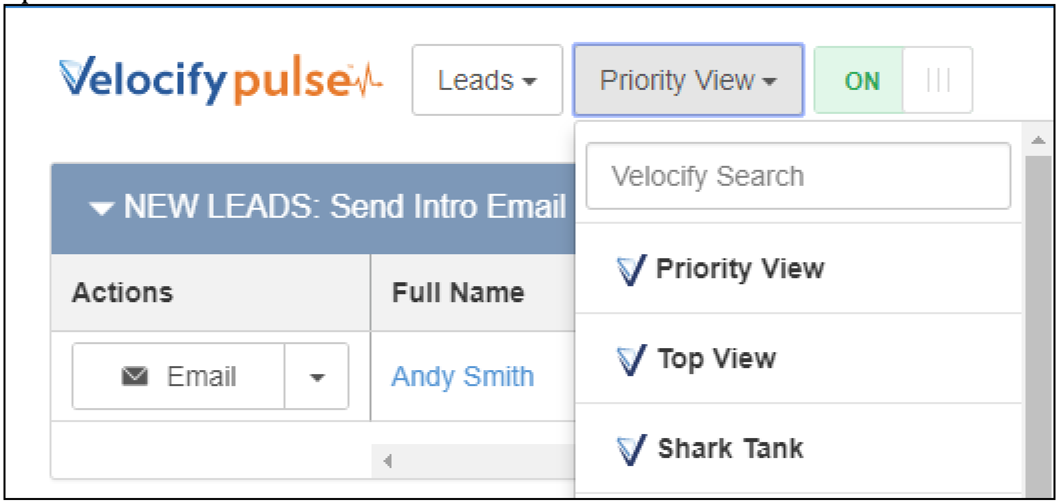
1. From the Leads module, click the Get Leads button.
2. In the Pull Distribution window, type the number of leads you want to assign to yourself, and then click the Get Leads button.



- This adds the leads to your Priority View.

Pull Preview/Updated Priority View

The Priority View drop-down list has also been updated with a new pull distribution option.

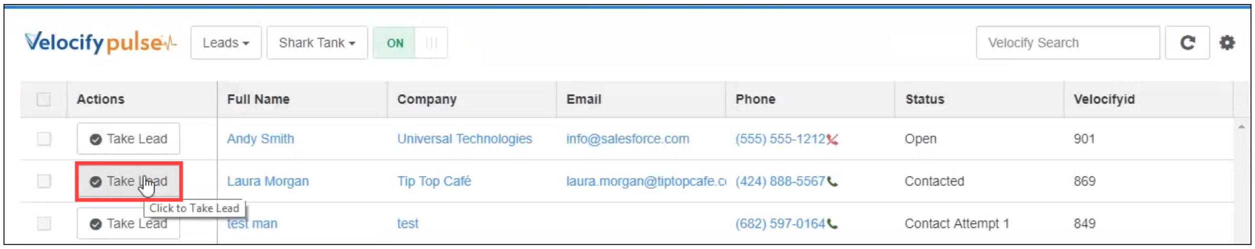


All views with the Velocify logo are managed by Velocify.

***NOTE**: The Priority View displays records in priority order and the Top View will display the prioritized records one at a time. Subsequent managed views, such as the **Shark Tank** (example above), are Pull Preview Views.*

How to Pull Preview

1. Select the **Leads** module, and from the **Priority View** drop-down list, select your pull preview program.
    - This displays all the leads that are available to you for self-assignment.
2. In the *Actions* column, click the **Take Lead** button corresponding to the lead you want to assign to yourself.



3. To self-assign multiple leads, select the check boxes corresponding to the leads, and then click the **Take Lead** button.