

Welcome to EchoQuote[™]

This Quick Start Guide describes the basic steps to start capturing leads with EchoQuote[™] quickly. Once set up, EchoQuote[™] is designed to work within your existing sales and marketing framework with minimal “care and feeding” on your part. Basically, EchoQuote[™] acts as a “middle man” that encourages your prospects to request pricing.

Goals

The overall goals of using the EchoQuote[™] service are:

1. Capture a higher number of **quality** website leads.
2. Capture leads **earlier** in the sales cycle.
3. Improve your Customer's **experience** with your website.
4. Empower the sales force to act on leads **faster**.
5. Show measurable marketing **results** for dollars spent.



Basic Steps

1) Login to the EchoQuote[™] Administration Panel

You should have received a “Welcome to EchoQuote[™]” email message when you registered. It contains your username (email) and password. Go to www.LeadLifter.com and click the EchoQuote[™] Login link at the top to log in to access the Administration Panel.

2) Add your Products and/or Services to the catalog

Once you have logged in, you will be at the Home page that shows all of the quote requests. Use the drop down menu(s) and go to **Setup > Product Catalog**. Follow the instructions to Add/Change/Delete your product offerings.

Tip: Try to keep your product offerings simple so they are easy to select by your potential customers. For complex products, offer typical “packages” that include everything needed for that solution. Remember, our goal is not to provide a complicated product configurator; our goal is to help potential customers take action and engage so we can start a sales conversation.

3) Add an EchoQuote[™] Pricing button to your website

To launch EchoQuote[™], you will need to add a Pricing button that is visible on your website pages. Using a small piece of “embed code”, copy and paste it into your website header file or contact your website administrator. The embed code for a variety of pricing button options is located in the Administration panel under **Setup > Website Integration**.

4) Changing from Auto to Manual Quote approval

The default behavior for EchoQuote[™] is to automatically approve and send quote requests and notify you of the activity via the EQ-SENT email notifications. However, you can configure EchoQuote[™] to wait for your approval before sending the request (requests will remain in a **Pending** state). Some customers want to review and research **who** is requesting the information before sending the quote. Typical reasons for manually approving requests include making sure they are not a competitor or making sure a partner/dealer is not already working with that customer. Approval behavior and other quote related information is controlled using the **Setup > Quote Types** menu option.

To learn more about the advanced features of EchoQuote[™], explore the Learning Center at **Help > Learning Center**. If you have any questions or need further assistance, contact support at 855-593-5438 or <mailto:support@echoquote.com>.

Thank you for trying EchoQuote[™]!