

REQUEST A REFUND IN INTEGRITY LEADCENTER (1/2)



Lead Center interface showing lead details for JUDY BRANNEN. The lead is categorized as Internet. The status is Third Call, received on 06/22/2023. The lead type is Gold Life Lead, and the lead ID is 10131252. A red arrow points to the three-dot menu icon in the top right corner of the lead details section.

Step 1: On the far right, click the 3 dots.

Lead Center interface showing the dropdown menu for the lead details. The menu options are Add Note, Add Reminder, and Request Credit. A red arrow points to the Request Credit option.

Step 2: Select "Request Credit".

Lead Center interface showing the 'Request Credit for Lead' dialog box. The dialog box has a 'Reason for Request' dropdown menu with 'Disconnected Phone Number' selected. Below the dropdown is a note: '* Submitting a request for credit will prevent you from making any further changes to this lead.' There are 'Cancel' and 'Request Credit' buttons at the bottom. A red arrow points to the 'Reason for Request' dropdown menu, and another red arrow points to the 'Request Credit' button.

Step 3: Select the reason for request and then select "Request Credit".

REQUEST A REFUND IN INTEGRITY LEADCENTER (2/2)



Name	Lead Status	Location (County, State)	Lead Owner	Lead Type	Received Date
<input type="checkbox"/> JUDY BRANNEN	You have a credit request pending review and cannot make changes to this lead.	Grayson, TX	TESTER AGENT	Gold Life Lead	6/22/2023
<input type="checkbox"/> Penney Mann	Third Call	Humboldt, CA	TESTER AGENT	Gold Life Lead	6/20/2023
<input type="checkbox"/> Paul Clari	Credit Requested	Grayson, TX	TESTER AGENT	Gold Life Lead	6/8/2023
<input type="checkbox"/> Victoria Cuthbert	New	Denton, TX	TESTER AGENT	Gold Life Lead	6/8/2023
<input type="checkbox"/> James Reid	New	McLennan, TX	TESTER AGENT	Gold Life Lead	6/8/2023

Step 4: To view the status of the refund, click the box beside the client's name and a message will appear.