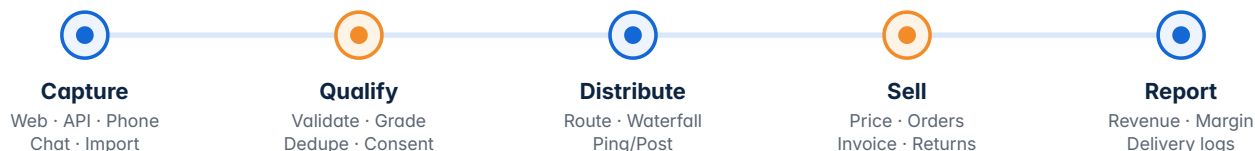


PRODUCT CAPABILITIES GUIDE

Lead Distribution & Monetization Platform

A technical guide to how LeadExec captures, validates, routes, sells and reports on leads, including waterfall distribution, real-time Ping/Post, buyer management and revenue optimization.

THE LEADEXEC LEAD LIFECYCLE

**Advanced Lead Distribution**

Price, priority, weighted, percentage, round robin, geolocation and waterfall routing

Buyer Management

Delivery accounts, criteria, quantity limits, orders and client portal

Real-Time Ping/Post

Ping trees, buyer bidding, revenue and profit requirements

Validation & Compliance

Lead grading, duplicate checks, TCPA certification and integrations

Lead Selling

Exclusive, semi-exclusive and shared selling with revenue optimization

Reporting

Revenue, cost and margin by buyer, source, campaign and ping target

CONTENTS

LeadExec Product Capabilities Guide

—	LeadExec at a Glance	3
	Platform definition, core concepts, end-to-end lead workflow	
A	Lead Capture and Ingestion	4
	API posting, form integrations, imports, phone, chat and Ping/Post intake	
B	Advanced Lead Distribution Engine	5
	Eligibility, sorting methods, waterfall, groups, lists, custom logic	
C	Ping/Post Lead Distribution	9
	Ping trees, bidding, bid selection, post and outcomes	
D	Lead Selling and Revenue Optimization	11
	Exclusive, semi-exclusive and shared selling; requirements; economics	
E	Buyer Management and Lead Orders	13
	Clients, delivery accounts, criteria, limits, orders, portal	
F	Lead Validation, Data Quality and Compliance	15
	Native controls, grading, quality control, consent, third-party services	
G	Campaign and Lead Source Management	16
	Sources, campaigns, settings, supplier economics	
H	Lead Delivery and Integration Capabilities	17
	Delivery methods, mapping, responses, retries, postbacks	
I	Reporting, Analytics and Operational Visibility	19
	Revenue breakdowns, ping reporting, logs, pivot grids	
J	Administration, Automation and Scalability	20
	Users, roles, security, configuration, processing	

About this guide

This guide describes the capabilities of **LeadExec**, the lead distribution software developed by ClickPoint Software. It is written for lead generators, lead aggregators, lead buyers and sellers, marketing and revenue operations teams, and the technology leaders who evaluate lead routing platforms.

Each section is self-contained. It explains what a capability does, how it operates inside LeadExec, how it interacts with other parts of the platform and what business outcome it supports.

Terminology used in this guide

LeadExec calls a lead buyer or destination a **Client**. This guide uses "buyer" and "client" interchangeably. Product setting names appear in **bold** when first introduced.

Scope

This guide covers generally available functionality. Some capabilities depend on account configuration, plan or third-party service subscriptions, and are noted where that applies. Examples use illustrative figures, not customer results.

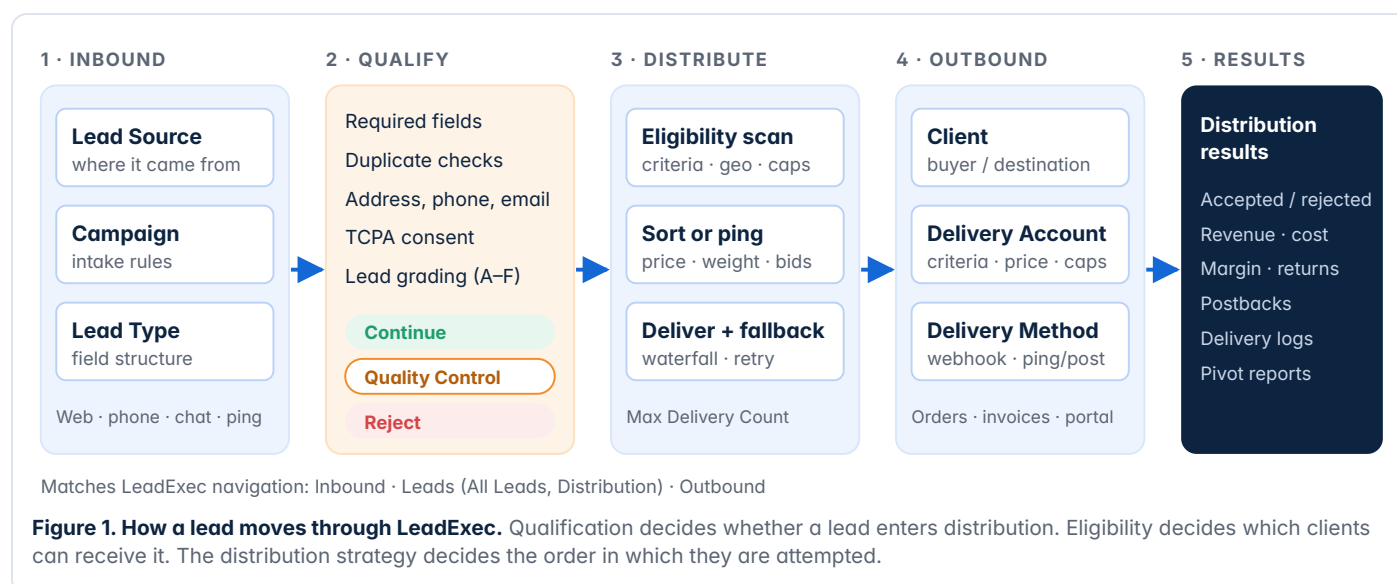
OVERVIEW

LeadExec at a Glance

DEFINITION

LeadExec is enterprise lead distribution and lead monetization software. It receives leads from websites, affiliates, publishers, lead providers, phone and chat campaigns, imports and APIs. It validates and grades each lead, determines which buyers are eligible, orders those buyers by a configured distribution strategy, and delivers or sells the lead in real time. Every attempt, response, sale and return is recorded.

LeadExec is used in two broad ways. **Lead sellers and aggregators** use it as lead selling software: they set buyer prices, run Ping/Post auctions, combine exclusive and shared sales and invoice buyers. **Enterprises with internal distribution needs** use it as lead routing software: they route leads to branches, dealers, franchises, agents or CRMs by territory, capacity and schedule. The same engine serves both.



Core concepts

Concept	What it is in LeadExec
Lead Type	The field structure for a category of lead, such as auto insurance or solar. It is usually configured first, and validation, routing, delivery and reporting all reference it. An account can run several lead types.
Lead Source	The origin of a lead: a website, landing page, affiliate, publisher, lead provider or API partner. Used to track volume, quality, cost and performance.
Campaign	A receiving channel within a lead source (web, phone, chat or Ping/Post). It carries intake rules, lead cost, revenue share, quality options and distribution settings.
Client	The buyer or destination that receives leads: an external buyer, branch, dealer, franchise, agent, internal team or CRM.
Delivery Account	A client's buying profile. It holds the criteria a lead must match, price, exclusivity, quantity limits, revenue requirements and up to three delivery methods. A client can have many.
Delivery Method	How a lead is transmitted: webhook (HTTP POST/GET, JSON, XML), Ping/Post, email, SMS, FTP, CSV, batch, client portal or SalesExec, with mapping, authentication, response and retry settings.
Order	A purchase commitment, by lead quantity or dollar amount, with dates, renewal, payment and return rules. It gates delivery accounts that use Require Order .
Maximum Delivery Count	The campaign setting that caps successful deliveries per lead. A value of 1 is exclusive; higher values allow semi-exclusive or shared selling.

SECTION A

Lead Capture and Ingestion



LeadExec accepts leads through several intake channels at once and identifies every lead by lead type, lead source and campaign on receipt. That identification decides which validation rules, quantity limits, distribution settings and supplier economics apply, so a single account can run many acquisition channels without mixing their rules.

- 
API lead posting

Lead sources post to a LeadExec lead receiver in **JSON, XML or URL-encoded form** format. Each request carries three identifiers: **LID** (lead type), **VID** (lead source) and **AID** (campaign). Campaigns can require API credentials (**Require Authentication**) or a submission password, and lead sources can be restricted to approved IP addresses.
- 
Phone leads and call routing

Phone campaigns receive inbound calls through the LeadExec IVR. A drag-and-drop **call flow designer** builds the IVR path, and calls can be recorded, routed and transferred live to buyers. Pay-per-call programs use tracked numbers shared with affiliates. Forms can also trigger a live call transfer.
- 
Posting instructions

LeadExec generates posting instructions for each campaign or lead source and exports them as PDF or Excel. They list the endpoint, fields and formats a supplier needs. Ping/Post campaigns get separate ping and post instructions.
- 
Chat leads

Chat campaigns create leads from website or landing-page chat. A **chatbot flow designer** configures qualification questions and TCPA consent capture. Chat conversations support real-time language translation, and SMS chat supports pay-per-chat programs.
- 
Form and platform integrations

Documented integrations map form fields to LeadExec fields through the posting URL. They cover Unbounce, Gravity Forms, Wix, GoHighLevel, Jotform, MailParser and Zapier, including Facebook lead forms via Zapier. Formstack and WuFoo are also supported.
- 
Inbound Ping/Post

Suppliers can ping LeadExec with non-PII qualification data, receive a price and Ping Order ID, then post the full lead. Section C describes this in detail.
- 
Lead imports

Leads can be imported from **.csv, .xls or .xlsx** files. The importer assigns lead type, source and campaign, maps each column to a lead field, shows validation errors before import and offers a sample template. **Auto-Distribution** is optional; when on, imported leads route to clients immediately.
- 
Lead Source Portal

Lead providers get their own login to submit lead information, review the distribution of leads they sent and view their API details, which reduces supplier support requests.

Intake controls applied at the campaign

Control	How it works
Campaign status	Only Active campaigns accept leads. Closed, Inactive, On Hold, Late, Suspended and custom statuses stop intake without deleting configuration.
Intake criteria	Lead-field, regular-expression and calculated-expression criteria (for example, a loan-to-value ratio derived from two fields) must pass for a lead to be valid.
Quantity limits	Hourly, daily and monthly caps on how many leads the campaign accepts from its source.

Aggregators buying from many suppliers can give each one its own campaign, price, cap, credentials and posting instructions while routing every lead through one shared buyer network.

SECTION B

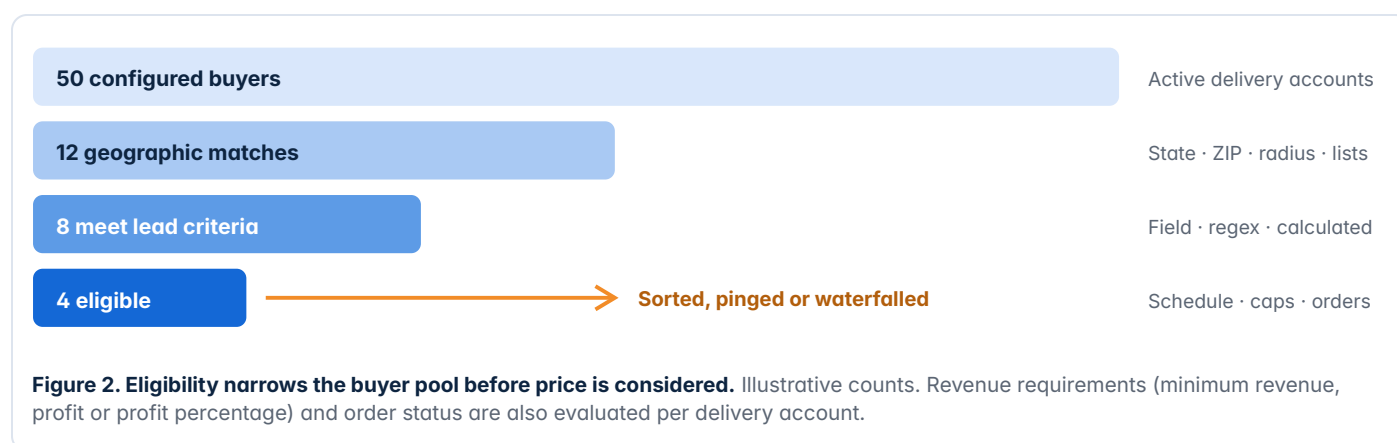
Advanced Lead Distribution Engine

B

LeadExec's distribution engine answers two separate questions for every lead. **Which buyers are eligible?** is answered by qualification rules. **In what order are eligible buyers attempted, and how many can receive the lead?** is answered by the distribution strategy and the campaign's Maximum Delivery Count. Keeping these questions separate is what makes LeadExec's routing predictable at scale.

Stage 1: eligibility

Before any delivery is attempted, LeadExec scans client delivery accounts and removes any that cannot take the lead. Price is evaluated only after this scan: a high-paying buyer that fails geography, criteria, schedule or capacity is never counted as an opportunity.



Stage 2: ordering eligible buyers

LeadExec offers six **client distribution sorting methods**. An account-wide default is set in Client Settings (**Automation Preferences**), and any campaign can override it. Each method below is described with what it does, how it works, when to use it and the outcome it supports.

Method	Ordering logic	Best for	Primary outcome
Price	Highest bid price first; optional Price Optimization	Lead sellers with competing buyers	Highest revenue per lead
Priority	Lowest priority number first (0 recommended as top)	Contracted or strategic buyers	Guaranteed preference
Weighted	Share proportional to assigned weight points	Relative allocation across many buyers	Proportional volume
Percentage	Fixed percentage enforced over a timeframe	Contracted volume splits	Exact share commitments
Round Robin	Fixed rotation; each lead to the next client	Equal treatment of peers or agents	Fair, even distribution
Geolocation	Nearest client to the lead's address first	Dealers, branches, local services	Proximity and speed to contact

Waterfall, Ping/Post, concurrent delivery, delivery groups, distribution lists and custom scripts are not separate sort orders. They control how the sorted list is worked through, which subset is sorted first, or how bids feed the order. They are covered on the following pages.

Distribution sorting methods in detail

Price-Based Distribution

REVENUE

WHAT	Sends each lead to the eligible client paying the most.
HOW	Clients are ranked by delivery-account price or, with Ping/Post, by returned bid. With Price Optimization on, LeadExec either compares the total value of shared versus exclusive client pricing, or pools all clients and selects the highest bidder.
WHEN	Multiple buyers compete for the same leads at different prices.
OUTCOME	Maximizes revenue per lead. Lower-priced buyers become automatic fallbacks.

Priority-Based Distribution

CONTROL

WHAT	Delivers to the highest-priority eligible client first.
HOW	Each client has a priority number; a lower number is a higher priority. LeadExec scans upward from the lowest number. Negative values are accepted, but 0 is the recommended top level.
WHEN	Some buyers have contractual first-look rights, or internal teams must be served before outside buyers.
OUTCOME	Predictable preference for strategic relationships.

Weighted Distribution

ALLOCATION

WHAT	Gives clients a larger or smaller share of volume.
HOW	Each active client gets a weight; more weight means more leads. A client with no weight is excluded, so every client needs one. A 1,000-point total is recommended. A Base Automation Type must be chosen to resolve ties.
WHEN	Allocation should track relative performance or relationship size without hard quotas.
OUTCOME	Proportional distribution that is easy to rebalance.

Percentage-Based Distribution

ALLOCATION

WHAT	Assigns each client a fixed share, such as 40% and 60%.
HOW	LeadExec enforces the shares within a timeframe set in Configure Automation Options . A Base Automation Type is required, and the total cannot be 0%.
WHEN	Contracts specify exact volume splits between buyers or business units.
OUTCOME	Measurable compliance with volume commitments.

Round Robin Distribution

FAIRNESS

WHAT	Rotates leads evenly through eligible clients.
HOW	Clients are cycled in a fixed sequence, each new lead going to the next. Adding or removing a client resets the sequence.
WHEN	Peers such as agents, franchisees or equally priced buyers should be treated the same.
OUTCOME	Even workload and fewer disputes over lead allocation.

Geographic Distribution

TERRITORY

WHAT	Routes by location, as an eligibility filter and as a sort order.
HOW	Criteria match state, ZIP or postal code, or a radius via the Distance Compare operator (for example, 25 miles around a ZIP). Geolocation sorting orders clients nearest-first. Canadian and international alphanumeric postal codes are supported. Territories can also be defined by county, DMA, region or custom grouping.
WHEN	Buyers serve defined territories, or proximity affects conversion.
OUTCOME	No out-of-territory deliveries, and faster local follow-up.

Combining methods: primary, secondary and ties

A primary method can be paired with a **secondary automation** that acts as a tie-breaker when the primary method cannot separate clients, for example equal prices. If clients still tie, the order in which they were created in LeadExec decides. Sorting always operates *within* the eligible set, so delivery-account criteria, schedules and hourly, daily, weekly and monthly maximums continue to shape who can receive the lead.

SECTION B · WATERFALL

Waterfall Lead Distribution and Fallback Routing

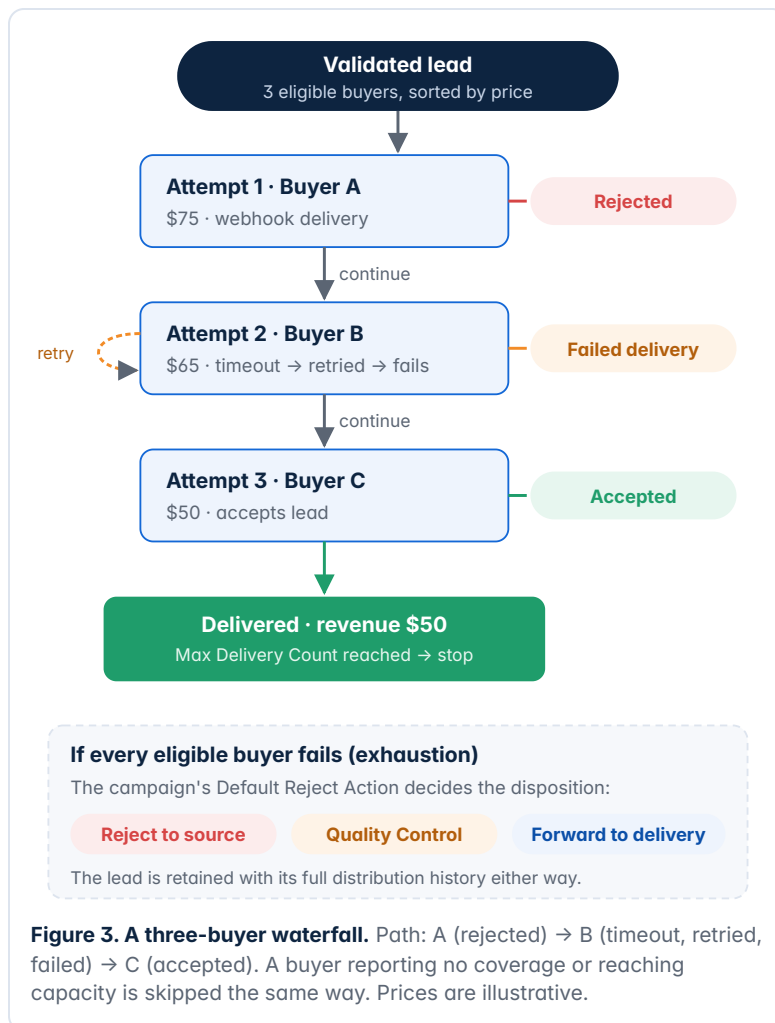
DEFINITION

Waterfall lead distribution moves a lead sequentially through eligible buyers. If one buyer cannot complete the sale, distribution continues to the next eligible buyer rather than ending, until the lead is delivered or opportunities run out.

In LeadExec, a waterfall is not a separate toggle. It is the result of eligibility, sort order, response handling, retry settings and the Maximum Delivery Count working together.

Sequence

- 1 **Qualify:** ineligible clients are excluded and never attempted.
- 2 **Order:** the sort method sets the attempt order, for example highest price first.
- 3 **Attempt:** the lead is delivered or pinged through the client's delivery method.
- 4 **Evaluate:** the response is parsed against the method's response settings.
- 5 **Continue or stop:** on failure, move to the next client; on success, stop once the Maximum Delivery Count is reached.



Waterfall mechanics

Element	How LeadExec handles it
Conditions that continue the waterfall	Buyer rejection, no coverage, no sale, failed delivery, timeout, capacity limit reached, or another configured response outcome.
Buyer response timeouts	Each delivery method sets how long LeadExec waits for a buyer response (for Ping/Post, in the endpoint configuration). An unresponsive endpoint is then handled under the configured response and fallback rules, so one slow buyer does not stall distribution.
Retry vs. waterfall	Retry resends to the <i>same</i> destination under the delivery method's retry settings, to recover from temporary technical failures. Waterfall moves to a <i>different</i> eligible buyer once the current one cannot be completed.
Maximum Delivery Count	Caps successful deliveries, not attempts. An exclusive campaign (count 1) may try several buyers but stops at the first success. A shared campaign continues until its count is met.
Capacity at exhaustion	With Enforce Quantity Constraints on (the default), if every eligible account is at its limit LeadExec rescans ignoring quantity limits so the lead can still be delivered.
Buyer-initiated rejection	The campaign's Default Reject Action also governs leads a buyer rejects: return to source, move to Quality Control or forward to other eligible clients.

Additional distribution methods and routing controls

These controls work alongside the sort methods: they decide which clients are evaluated first, how many receive a lead at once and how exceptions are handled.

Concurrent Distribution

SPEED

WHAT	Delivers to multiple destinations at the same time instead of one after another.
HOW	Parallel processing attempts several eligible opportunities simultaneously. One delivery account can also carry up to three delivery methods (e.g. webhook, email, SMS) that fire together. Maximum Delivery Count still governs how many buyers receive the lead.
WHEN	Shared and semi-exclusive programs, where waiting on each buyer in turn slows delivery.
OUTCOME	Faster speed-to-lead for every buyer on a shared lead.

Distribution Groups

STRUCTURE

WHAT	Creates tiers of clients that are evaluated before everyone else.
HOW	Delivery Groups (Outbound → Priority Groups) hold clients or individual delivery accounts and apply their own method: Round Robin, Priority, Price, Weighted, Percentage or Geolocation. All groups are checked, in the order set, before ungrouped clients. A campaign's Delivers To setting can restrict delivery to an exclusive group.
WHEN	A preferred tier should be served first, e.g. round robin among top partners, price for everyone else.
OUTCOME	Tiered routing without separate campaigns.

Conditional and Rules-Based Routing

RULES

WHAT	Restricts or redirects leads based on lead data.
HOW	Delivery-account criteria use lead fields, regular expressions, calculated expressions and evaluate functions, with operators from Equal To through Between, Is Any Of, Contains, Distance Compare and Date Compare. Client groups add Delivery Overrides that swap the delivery method when criteria match. Force IDs send a lead straight to the client whose ID it carries, bypassing standard distribution.
WHEN	Buyers accept only specific products, credit tiers, ages or date ranges.
OUTCOME	Every delivery matches the buyer's stated requirements.

Distribution Lists

TERRITORY

WHAT	Assigns large sets of values, such as thousands of ZIP or postal codes, to clients.
HOW	A list targets one lead type and one lead field. A Link Field and Link Value (for example, Country = United States) decide when it applies, so different countries can use different lists. Entries are added manually or imported from Excel. A Default Client receives leads that match no entry.
WHEN	Dealer networks, franchises and large coverage maps.
OUTCOME	Exact territory assignment with a fallback for gaps.

How the layers combine

#	Layer, in evaluation order
1	Force ID / Distribution List: lead names a client, or its ZIP maps to a dealer
2	Eligibility: criteria, geography, schedules, limits, orders, revenue rules
3	Delivery Groups: e.g. round robin among three preferred partners
4	Primary + secondary sort: price tie-broken by priority, or live bids via Ping During Sort
5	Waterfall / concurrency: work the list sequentially or in parallel until the Maximum Delivery Count is met

Custom Distribution Logic

EXTENSIBLE

WHAT	Handles routing scenarios that built-in options cannot express.
HOW	Distribution Scripts are account-specific logic that ClickPoint support deploys and maintains. Delivery-account criteria can also use an Evaluate Function written in C#.
WHEN	Business rules unique to one organization.
OUTCOME	Non-standard workflows without a separate system.

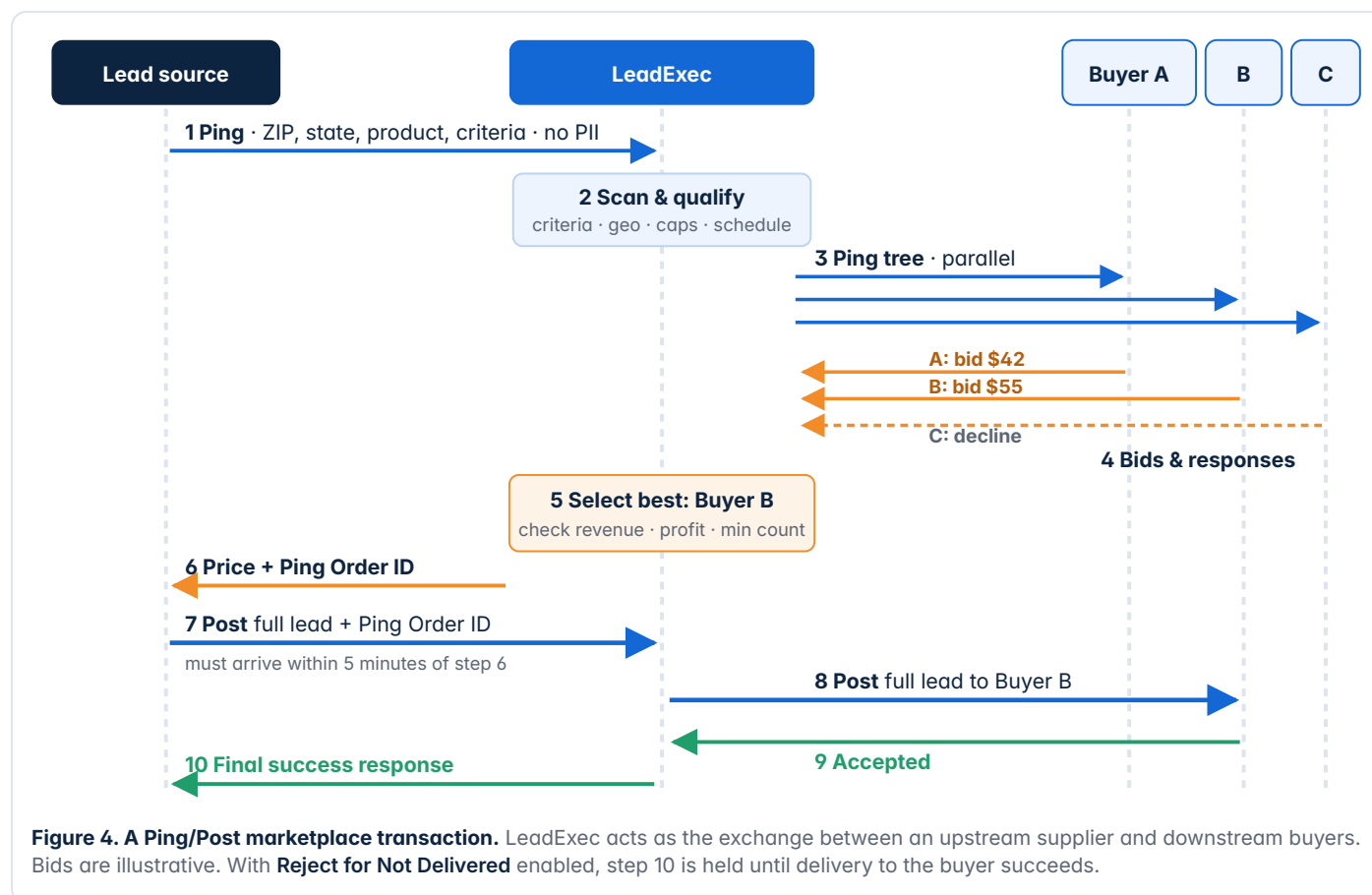
SECTION C

Ping/Post Lead Distribution

C

DEFINITION

Ping/Post is a two-step, real-time lead distribution method. A *ping* carries partial, non-identifying lead data so buyers can check eligibility and return a price. The *post* sends the complete lead, including contact details, only to the selected buyer. A **ping tree** pings many buyers at once and compares their responses.



Dimension	Direct post (traditional delivery)	Ping/Post
Data shared first	Full lead, including contact details	Qualification data only; PII is sent after a bid is won
Price	Fixed in advance on the delivery account	Static or dynamic bid returned per lead
Buyer decision	After receiving the full lead	Before receiving it, so fewer post-delivery rejections
Seller control	Buyer order set by sort method	Live bids compared, with revenue and profit thresholds

When to use Ping/Post

Use Ping/Post when buyers price leads differently based on attributes, when suppliers want a price before releasing contact data, or when lead value is high enough that an auction raises revenue. Direct post remains simpler for fixed-price buyers and internal routing. LeadExec supports both delivery styles in the same account.

How each Ping/Post stage works

-  **Ping requests and partial data**
 An inbound ping contains geography, product interest, demographics and other qualifying fields. Name, phone and email are withheld. The campaign's **Field Requirements for PING** define which fields a source must or may send, and these appear in its posting instructions. The ping endpoint is separate from the post endpoint and accepts JSON or URL-encoded requests.
-  **Buyer eligibility evaluation**
 Buyers are qualified before they are pinged, using the same criteria, geography, schedule and capacity rules as any other delivery. **Qualify All Criteria** decides whether clients are checked against all of their criteria or only against the fields present in the ping. Qualified buyers can still decline.
-  **Bidding and pricing responses**
 Buyers can return a **dynamic** bid priced from the lead's attributes, or LeadExec can apply a **static** price for any lead meeting the buyer's minimum criteria. Both models run side by side. Each outbound Ping/Post delivery method defines in its **Response Settings** what marks acceptance or rejection and where the bid value appears in the buyer's response.
-  **Duplicates and compliance in the ping**
Allow PING Duplicate API Check checks for duplicates before final submission (a fee may apply). **Return Client Offers** returns buyer offers in the ping response to support FCC one-to-one consent workflows.
-  **Bid evaluation and selection**
 With **Ping During Sort** enabled, buyers are pinged in parallel during the client scan and their bids feed directly into sorting. LeadExec selects either the highest bidder or the buyer meeting criteria-based acceptance rules, and can compare exclusive and shared outcomes (Section D).
-  **Seller requirements before a bid is returned**
 Inbound Ping/Post campaigns can require a minimum **Revenue**, **Profit** (revenue minus lead cost) or **Profit Percentage**, plus a **Minimum Delivery Count** of matching buyers, before LeadExec returns a price. **Scan for Coverage** confirms a qualified buyer exists before accepting; it is strongly advised with revenue-share suppliers.
-  **Post delivery of complete lead data**
 The source posts the full lead with the **Ping Order ID** so LeadExec can match it to the ping. The post must arrive within **5 minutes** of the ping response; pings not posted in that window expire. LeadExec then posts the full payload to the winning buyer. A rejected or invalid ping skips the post entirely.
-  **Acceptance, rejection and outcomes**
 The source receives success or failure based on the final result. **Reject for Not Delivered** holds the response until the lead is actually delivered, not just accepted into LeadExec. If the selected buyer fails at post, waterfall logic determines the next step.

Ping tree configurations

Configuration	How it is set up in LeadExec
Inbound ping tree	A campaign with the Ping Post channel receives pings from suppliers, scans buyers and returns a price.
Outbound Ping/Post buyers	One Ping Post delivery method holds both stages, each with its own endpoint, authentication, field mappings, request body, response settings and retry settings (JSON, XML or form-encoded).
Marketplace (both)	Supplier pings flow through LeadExec to Ping/Post buyers; the best bid returns with a Ping Order ID.

Buyer response monitoring

The **Outbound Ping Activity** screen logs every ping sent to a buyer: accepted (yes/no), time sent, client, delivery account, request and response previews, whether a post followed, lead ID and potential revenue. Each row opens the full request and response, delivery attempts, scan logs and originating inbound ping. The **Inbound Ping Target Breakdown** report summarizes pings by lead type, provider, campaign and buyer with leads sent, leads sold, estimated revenue and revenue.

SECTION D

Lead Selling and Revenue Optimization



LeadExec is lead selling and lead monetization software, not just a pipe between systems. It decides how many times each lead is sold, to whom and at what price. It enforces minimum economics before a sale is made and records revenue, cost, margin and returns for every transaction.

Selling models

Exclusive

MDC = 1

One successful delivery per lead. Usually commands the highest unit price. Delivery accounts can be flagged **Exclusive Delivery**.

Semi-exclusive

MDC = 2-3

A small, fixed number of buyers. Balances price per sale against total revenue per lead.

Shared

MDC = N

Several buyers up to the configured limit, delivered sequentially or in parallel. Maximizes sales per lead.

The campaign's **Maximum Delivery Count (MDC)** sets the model. A shared lead is not broadcast to everyone; it goes only to clients that pass eligibility. **Apply Groups as Criteria** can make deliveries exclusive within a client group so that, once one member buys, the lead moves on to the next group.

Revenue optimization: comparing total value, not top price

With price optimization enabled, LeadExec compares the total revenue of each eligible selling scenario for the individual lead, instead of always choosing the single highest bidder. The answer changes lead by lead, because the set of eligible buyers changes.

Lead 1: three semi-exclusive buyers qualify

Exclusive · 1 × \$100

\$100

Semi-exclusive · 3 × \$40

\$120

Selected

Lead 2: only two shared buyers qualify

Exclusive · 1 × \$100

\$100

Shared · 2 × \$40

\$80

Selected

Figure 5. The same optimization rule produces different decisions. Illustrative prices. If a third \$40 buyer qualified for Lead 2, shared revenue would rise to \$120 and overtake the exclusive sale. Across 1,000 leads that resemble Lead 1, choosing the semi-exclusive path yields \$120,000 rather than \$100,000.

Buyer pricing and prioritization

- **Lead Price** is set per delivery account, so one client can buy different segments at different prices.
- Orders can apply a per-lead price, including discounts, that overrides the account price.
- **Allow Confirm Price** lets a buyer's API confirm the final price after delivery.
- Ping/Post bids price each lead in real time.
- Priority and delivery groups protect strategic buyers even when price sorting is used.

Minimum economics per sale

- **Revenue Requirement:** minimum revenue for a client to receive the lead.
- **Profit Requirement:** minimum revenue minus lead cost.
- **Profit Percentage Requirement:** minimum margin percentage.
- Set per delivery account, or per inbound Ping/Post campaign against combined buyer responses.
- **International currency conversion** keeps order values accurate in the seller's currency.

Supplier economics: lead cost and revenue share

Lead selling has two sides. Each campaign records what the seller pays for its leads, so margin is known for every sale:

Supplier payout model	How LeadExec calculates it	Typical use
Price per Lead	A fixed cost for each lead received from the source	Purchased leads at a negotiated CPL
Revenue Share: Percentage	A percentage of the lead's final selling price	Affiliates paid on what the lead earns
Revenue Share: Price Per Sale	A fixed amount for each sale, regardless of price or number of buyers	Partners paid per sale on shared leads

Payouts are calculated from the pricing in the campaign and delivery account. They can be sent back to suppliers automatically through **postbacks**, which include the payout model, total sold price, revenue-share payout and number of deliveries (Section H).

Selling across many buyers

Unlimited buyers and deliveries

Any number of clients, each with multiple delivery accounts, can compete for the same lead type. A lead can be sold up to its Maximum Delivery Count across exclusive and shared accounts.

Returns management

Buyers can request returns on delivered leads that meet return criteria. **Max Return Percentage** caps returns per delivery account and per order, with account-wide defaults. Campaigns set how many days returns are allowed. Approved returns adjust buyer activity and supplier economics, and returns are reported.

Duplicate re-selling rules

Route Duplicate Leads can deliver a duplicate to a buyer after the original was sent. **Resend Deliveries** can re-deliver an existing lead when a duplicate arrives.

Lead sales and transaction tracking

Every delivery records the buyer, delivery account, order, price and outcome. Buyer-side reporting tracks sent, accepted, rejected, pending, returned, revenue, cost, margin and margin %. Provider-side reporting tracks the same economics for each supplier, so profitability can be traced from source to buyer.

Billing tied to distribution

Orders, invoices and payments connect directly to delivered leads. Stripe and Authorize.net process card payments, and buyers can review invoices and pay through the client portal (Section E).

Worked example: one lead, end to end

An affiliate on a 50% revenue-share campaign pings LeadExec. Four buyers qualify. Ping During Sort returns bids of \$48, \$44 and \$40, and one decline. The campaign's Maximum Delivery Count is 3, and its Profit Percentage Requirement is 40%. LeadExec compares \$132 in shared revenue (48 + 44 + 40) with the best exclusive offer and selects the shared path. The revenue-share payout is \$66, so profit is \$66 (50%), which clears the requirement. LeadExec returns the price to the affiliate, receives the post, delivers to all three buyers in parallel, records \$132 revenue against \$66 cost, and fires a postback with the payout.

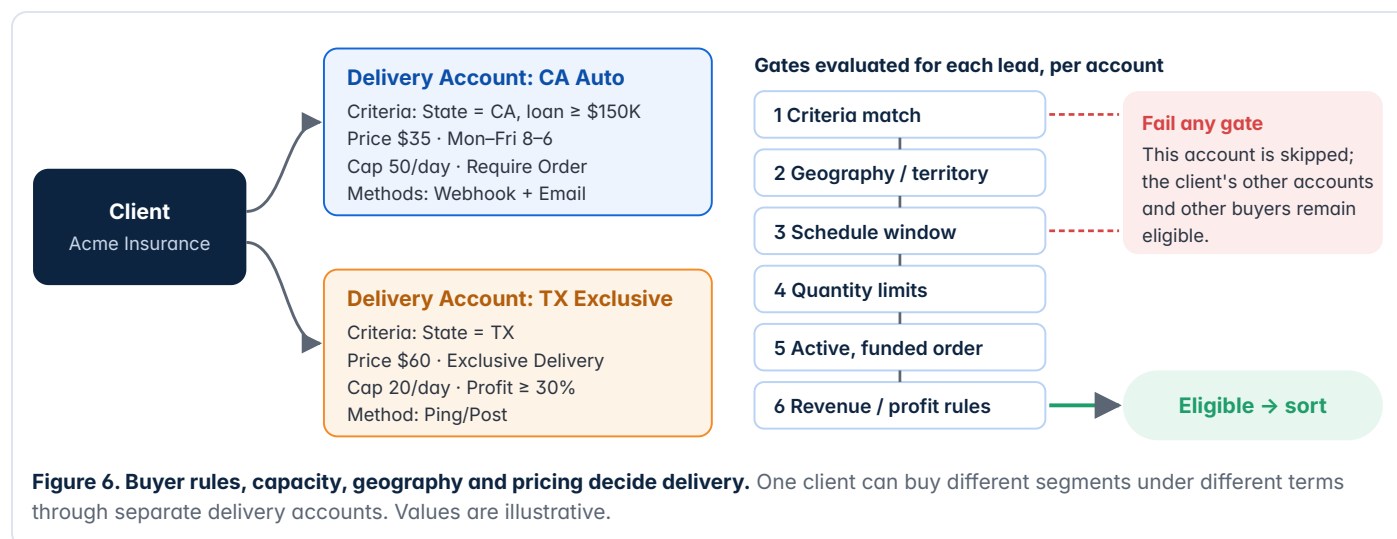
Figures are illustrative and do not represent customer results.

SECTION E

Buyer Management and Lead Orders

E

LeadExec's buyer management software models each buyer as a **Client** with one or more **Delivery Accounts**. Requirements, prices, caps and endpoints live on the delivery account, not in campaign logic. That keeps a network of hundreds of buyers manageable: changing one buyer's ZIP list or daily cap touches one record and nothing else.



Delivery account controls

Control	Detail
Lead qualification criteria	Lead Field, Regular Expression, Calculated Expression and Evaluate Function (custom C#) criteria. Operators: Equal / Not Equal, Greater / Less Than (or equal), Between, Is Any Of / Is Not Any Of, Contains / Does Not Contain, Distance Compare (miles from a postal code) and Date Compare (time since a lead date).
Geographic coverage	State, ZIP or postal-code lists, radius around a ZIP, distribution-list assignments and Canadian or international postal codes.
Schedules and availability	Delivery schedules restrict buying to set days and hours. Outside its window, a matching buyer is ineligible and the lead moves on. Delivery Delay holds a lead for a set time before delivery.
Delivery limits and capacity	Maximum qualified leads per hour, day, week and month. Enforce Quantity Constraints can relax limits only when every account is capped.
Buyer-specific pricing	Lead Price, Exclusive Delivery, Revenue, Profit and Profit Percentage Requirements, and Ping/Post bids.
Delivery endpoints	Up to three delivery methods per account, plus Delivery Parameters that override or append values to the method for that account.
Automation and status	Automated delivery can be paused while a buyer is onboarded. Accounts can join a delivery group and set a Max Return Percentage.
Offers	Static or dynamic buyer offers (company, description, terms and privacy URLs, TCPA consent text) for one-to-one consent workflows.

Lead order management

An **Order** defines how many leads, or how many dollars of leads, a client buys, with optional start and end dates. Delivery accounts with **Require Order** enabled receive leads only while an active order covers them. Orders can link to all of a client's delivery accounts or to specific ones.

Order setting	Behavior
Quantity order	A lead count, with an optional per-lead price that overrides the delivery account's price
Dollar order	A total budget. Dollar Item Fill Limit sets when it renews, and the remaining balance carries forward
Renewal: On Fill	Renews automatically when the quantity or dollar limit is reached
Renewal: Close by End Date	Stops at the end date
Renewal: No Renewal	Requires manual renewal
Auto Charge	Charges at creation or renewal (and on completion for quantity orders)
Generate Invoice	Creates an invoice with each automatic payment
Max Return Percentage	Return allowance for leads delivered on the order

Example: dollar order renewal

A \$200 order with a \$12 Dollar Item Fill Limit renews once \$188 has been used. That point is reached even when leads sell at different prices across delivery accounts or through Ping/Post, and the leftover balance carries to the renewed order.

Payments and pending orders

Payments are processed through **Stripe** or **Authorize.net**, or recorded manually as check, bank transfer, cash, mobile payment, credit or adjustment. If an automatic charge is declined, the order moves to **Pending** and stops receiving leads until payment succeeds or an administrator approves it. Delivery never outruns payment.

Order forms

Configurable order forms let buyers define their own purchasing terms, such as criteria, quantities and budget.

Client portal: buyer self-service

The branded **Client Portal** lets buyers work without contacting the seller. Depending on permissions, they can:

- view delivered leads and successful post information
- create, pause and renew orders, and select criteria
- request returns
- view invoices and make payments
- manage their own portal users

Administrative controls include disabling portal access for inactive users and expiring the portal links in delivery emails after a set number of days. Portal delivery is also a delivery method in its own right: leads can be delivered directly to the portal instead of an endpoint.

Managing buyers at scale



Client groups

Apply shared criteria, pricing, portal behavior and delivery settings across many clients. Groups support a **Default Delivery**, a **Force Delivery** that takes precedence, and criteria-based **Delivery Overrides**.



Buyer performance tracking

Sent, accepted, rejected, pending and returned counts, with revenue, cost, margin and margin %, broken down by channel, group, buyer, campaign and order.



Wizard-based setup

A step-by-step wizard creates the client, delivery methods, delivery accounts, orders and invoices in sequence, which shortens onboarding for new buyers.

SECTION F

Lead Validation, Data Quality and Compliance

F

Validation runs before buyer matching, so quality results gate distribution and Ping/Post. Each lead is continued, held for review in Quality Control or rejected. LeadExec combines native controls with optional third-party services connected through integrations.

Control	Type	What it does
Required fields & criteria	NATIVE	Lead-field, regular-expression and calculated-expression rules a lead must pass at the campaign
Duplicate detection	NATIVE	Checks configured duplicate fields within a time window (default 30 days). Optionally checks previously rejected leads, appends new data to the existing lead or resends deliveries
Address standardization	NATIVE	Formats the primary address to USPS standards and appends city and state from postal code and country
Mobile check / IP geolocation	NATIVE	Identifies mobile numbers and locates the lead's IP address (a fee may apply)
Lead grading	NATIVE	Awards points for passing address, phone, email, IP-to-address and comment checks, then maps the score to grades A-F, each with an action
Quality Control	NATIVE	Holds leads for manual validation. Reviewers validate, invalidate with a reason tag, or return them to the source
TCPA consent certification	NATIVE	Captures consent text, name, phone, IP and timestamp on any form, with optional mobile and IP-location checks, and issues a printable consent certificate per lead
Do Not Contact list	NATIVE	Suppresses leads that match an account-level do-not-contact list
Data retention	NATIVE	GDPR Retention Policy deletes leads after a set number of days, with a separate period for rejected leads
TrustedForm	3RD PARTY	ActiveProspect certificate verification and storage, lead data comparison and bot detection
Jornaya	3RD PARTY	Third-party consent documentation via LeadiD token
Trestle Real Contact	3RD PARTY	Real-time phone and contact validation with risk analysis
IPQualityScore	3RD PARTY	Fraud screening on phone, email and IP; returns validity, line type, VoIP status and fraud risk
DNC.com Litigator Scrub	3RD PARTY	Flags known serial TCPA litigators for rejection or Quality Control
Pure CallerID	3RD PARTY	Phone validation and DNC status
Smarty	3RD PARTY	Address verification and enrichment

Lead grading in practice

Administrators enable the checks they want, assign each a point value and set the score range for each letter grade. A common configuration delivers A and B leads, sends C and D leads to Quality Control and rejects F leads. Grading is enabled per campaign.

Consent and one-to-one workflows

Consent text is configured per campaign and captured by the TCPA form script. Campaigns can reject leads without consent. For FCC one-to-one consent requirements, **Return Client Offers** returns specific buyer offers in Ping/Post responses so consent can name the seller.

Compliance responsibility

LeadExec provides tools to capture, verify and document consent and to screen leads. It does not by itself guarantee compliance with TCPA, FCC, GDPR or any other law. Organizations remain responsible for determining and meeting their legal obligations. Third-party services require separate accounts and may carry their own fees.

SECTION G

Campaign and Lead Source Management



Lead sources and campaigns are how LeadExec separates acquisition channels. A **Lead Source** is the partner or property that supplies leads. A **Campaign** is a receiving channel inside that source, such as one form, geography, vertical or price point. Intake rules, quality settings and supplier economics are set per campaign, so each channel is managed and measured independently.

Campaign channels

Channel	Receives
Web Lead	Posts from forms, landing pages, affiliates and APIs
Ping Post	Two-step pings and posts from suppliers
Phone Lead	Inbound calls through IVR call flows
Chat Lead	Website and landing-page chat conversations

Source-specific processing rules

Because rules attach to each campaign, two suppliers sending the same lead type can be handled differently:

- different duplicate windows, criteria and quantity limits
- Quality Control for a new supplier on probation, direct delivery for a trusted one
- grading, TCPA and validation services enabled per campaign
- **Delivery Target:** any client, a single client or selected clients and groups
- a campaign-specific distribution method and Maximum Delivery Count
- **Client Required Criteria,** criteria a buyer's delivery account must contain to receive the campaign's leads

Campaign configuration areas

Area	Settings
General	Name, status, lead cost, authentication, password
Supplier economics	Price per lead; revenue share by percentage or per sale
Outbound delivery	Delivery target, distribution method, Maximum Delivery Count, Delivers To group
Quality	Duplicate checks, criteria, quantity limits, Quality Control, Default Reject Action, address, mobile and IP checks, grading
Ping options	Revenue, profit and profit % requirements, minimum delivery count, ping field requirements
Compliance	TCPA services and consent text, FCC one-to-one offers, retention policies
Automation	Delivery queue; automated call or text engagement on arrival
Assignments	Default user, category, group for brand or division reporting
Postback	Endpoint and parameters returned to the supplier after delivery or sale
Returns	Number of days returns are allowed

Campaign performance, volume and profitability



Volume monitoring

The dashboard shows leads received, accepted, delivered and rejected by day, month or year, filtered by lead type, source and campaign.



Source-level economics

The Lead Providers Revenue Breakdown shows received, accepted, rejected, returned, QC pending and QC rejected leads with revenue, cost, margin and margin % by provider and campaign.



Real-time ROI

Channel, lead source and campaign ROI appear in one view, so underperforming sources can be capped or paused before they affect margin.

Buyer allocation by campaign

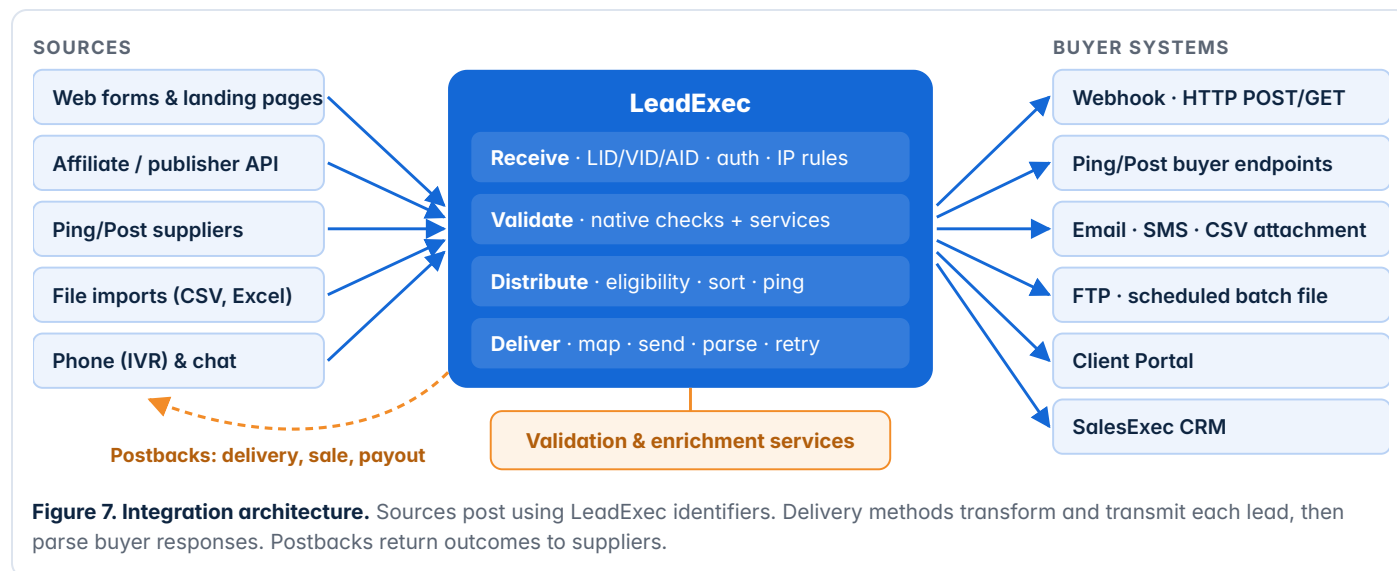
Campaign-level Delivery Target and Delivers To settings control which buyers each acquisition channel can reach. For example, a premium publisher's leads can go to an exclusive delivery group while other traffic is sold shared to the open pool.

SECTION H

Lead Delivery and Integration Capabilities



Delivery methods are reusable connection definitions that tell LeadExec how to transmit a lead to a client and how to interpret what comes back. They are separate from the business rules on delivery accounts, so one integration can serve many accounts.



Delivery methods

Method	Transmission
Webhook	HTTP POST or GET; JSON, XML or form
Ping/Post	Separate ping and post configurations
Email	Lead in a template body, with portal link
SMS Notification	Lead in a text-message template
CSV Attachment	Each lead emailed as a CSV file
Batch Delivery	All leads in a scheduled window, as Excel or CSV
FTP	CSV uploaded to the buyer's FTP server
Lead Portal	Delivered into the Client Portal
SalesExec	Two-way integration with ClickPoint's CRM

Endpoint configuration

- **Field mapping and transformation:** map LeadExec fields to the buyer's names (for example [ZipCode](#) → [zip](#)) and define the request body.
- **Authentication** and content type for each endpoint.
- **Response handling:** what in the response means accepted or rejected, and where a price or bid appears.
- **Retry settings and timeouts** for failed or slow endpoints.
- **Delivery Parameters** to override or append values for one delivery account.
- **Published delivery IP addresses** buyers can allow-list.

External validation and enrichment services

Third-party services run inside the lead workflow. Their results become lead data that criteria, grading and actions can use, such as phone validity, line type, fraud score, litigator match or certificate status. They are not separate steps operators must reconcile by hand. A high-risk phone result, for example, can send a lead to Quality Control while an otherwise identical lead with a clean result continues to distribution.

Delivery status monitoring and error handling

Every attempt is logged. The **Lead Deliveries** window shows each attempt's destination, result, order and invoice information, and the raw request, response and processing logs. This makes it possible to prove what was sent, when, and what the buyer answered. Failed attempts are retried under the method's retry settings, and the waterfall then continues to the next eligible buyer.

Symptom	Where to look in LeadExec
Buyer rejecting leads or pings	View Request / Response to compare what was sent with the buyer's reason
Accepted ping but no lead delivered	POST Sent flag, then View Send Information
Lead went to an unexpected client	View Scan Logs to see each client's eligibility result and the sort order
Buyer disputes lead content	Compare View Lead with the logged request payload
Supplier disputes payout	Postback history with sold price, deliveries and payout

Postbacks

A **postback** sends data from LeadExec to an external system, typically a supplier's or affiliate network's tracking platform, after a lead is delivered or sold, not at receipt. Postbacks use HTTP POST or GET with configurable parameters:

- **Static values**, for constants and environment IDs
- **Lead fields** from the lead record
- **System fields**: lead, lead type, lead source and campaign UIDs
- **Transactional fields**: postback ID, payout model (pay per lead, pay per sale, revenue share), total sold price, revenue-share payout, number of deliveries, client UID

API and custom integrations



API access

LeadExec provides APIs and webhooks for custom integrations. API credentials are managed in account settings and can be restricted to approved IP addresses. Buyer-side APIs can confirm a lead's price after delivery when **Allow Confirm Price** is enabled.



Ecosystem integrations

Zapier connects LeadExec to other applications for intake and downstream automation. Native integrations include ActiveProspect TrustedForm, Trestle, IPQualityScore, DNC.com, Pure CallerID, Smarty, USPS, Twilio, Unbounce and Gravity Forms.

SECTION I

Reporting, Analytics and Operational Visibility

LeadExec records the full history of every lead: receipt, validation results, each client scanned, each delivery attempt, buyer responses, sales, returns and payouts. Reporting is built on that record, so operational troubleshooting and financial analysis use the same data.

Report / screen	Dimensions	Measures
Dashboard	Day, month, year; lead type, source, campaign	Leads received, accepted, delivered, rejected
Buyers Revenue Breakdown	Channel, group, buyer, campaign, order ID; year → day	Sent, accepted, rejected, pending, returned, revenue, cost, margin, margin %
Lead Providers Revenue Breakdown	Lead type, channel, provider, campaign; year → day	Received, accepted, rejected, returned, QC pending, QC rejected, revenue, cost, margin, margin %
Inbound Ping Target Breakdown	Lead type, provider, campaign, buyer	Target, leads sent, leads sold, estimated revenue, revenue
Outbound Ping Activity	Date, lead type, client, delivery account	Accepted, post sent, request/response, potential revenue; exportable
Distribution screen	Per lead	Clients attempted, delivered or rejected, purchaser, returns, history
Real-time ROI	Channel, lead source, campaign	Return on lead spend
Lead Forecasting	Lead demand	Where to invest acquisition spend based on buyer demand



Custom pivot grids

Pivot reports are available on lead-data screens, including the Lead List and Distribution screens. Users drag fields into rows, columns and values, start from pre-built templates or build from scratch, and save layouts for reuse. Any lead field, including custom fields, can be a dimension.



Operational troubleshooting

Scan logs show why each client was or was not eligible for a lead. Delivery logs show the exact request and response for each attempt. Together they answer "why did this lead go there?" without engineering help.



Using reporting to improve routing and profit

- **High rejection from one buyer:** tighten that delivery account's criteria to match what it actually accepts.
- **Low margin on a source:** lower its lead cost, cap its volume or route it to shared selling.
- **High QC rate on a campaign:** review grading thresholds or supplier quality.
- **Ping sold rate falling:** compare estimated with actual revenue by buyer and adjust minimum revenue requirements.
- **Unmet buyer demand:** use forecasting to direct acquisition spend.

Historical reporting

All breakdown reports support year, quarter, month and day views over any date range, so trends in volume, acceptance, returns and margin can be compared across periods. Retention follows each campaign's configured retention policy.

SECTION J

Administration, Automation and Scalability

J

LeadExec is configured, not coded. Routing, delivery and validation workflows are built and changed from the application by operations staff, with custom scripting reserved for genuinely unique rules.

- 
Users, roles and permissions
 Permission roles control access to leads (including returns), clients, lead sources, reports and system settings. **Filters** restrict a role to specific clients, lead sources and lead types. For example, an account manager can see only the buyers assigned to them.
- 
Security controls
 Multi-factor authentication, password length and complexity rules, password expiration, API credentials, and IP-based access control for the API and for individual lead sources.
- 
Configuration management
 Lead types define fields, categories and display groups. Client settings hold default distribution, distribution lists and scripts. Campaign and delivery-account settings layer on top of those defaults. Branding settings apply the seller's identity to portals and communications.
- 
Notifications and email compliance
 Account notifications alert operators to key events. Sending domains and email addresses are verified for CAN-SPAM.
- 
Automated processing rules
 Leads are validated, graded, routed, delivered, invoiced and reported without manual steps. Automation can be turned off per delivery account during onboarding, and campaigns can trigger an automated call or text engagement when a lead arrives.
- 
Distribution scheduling and workflow controls
 Buyer schedules, delivery delays, scheduled batch delivery windows, quantity limits, order dates and campaign statuses control when leads flow. Quality Control and default reject actions route exceptions to people.
- 
High-volume processing
 The **delivery queue** processes delivery asynchronously, so suppliers get fast responses while buyer deliveries run in the background. Parallel processing handles shared deliveries concurrently. The platform runs on Microsoft Azure and scales horizontally across application servers, databases, lead receivers and processing services.
- 
International operations
 Multi-currency order values with currency conversion, Canadian and international postal-code routing, and multilingual chat translation.

Enterprise integration requirements checklist

Requirement	LeadExec capability
Authenticated, IP-restricted lead intake	Campaign authentication, passwords, API and lead-source IP restrictions
Standard payload formats	JSON, XML and URL-encoded intake; JSON, XML and form delivery
Audit trail per lead	Scan logs, delivery request/response logs, TCPA certificates, postback history
Data retention control	Per-campaign retention policies for received and rejected leads
Least-privilege access	Permission roles with client, source and lead-type filters; MFA
Downstream system sync	Webhooks, Ping/Post, FTP, batch, postbacks, Zapier, SalesExec



See LeadExec with your own lead flow

ClickPoint Software can walk through your sources, buyers and selling model, from waterfall and Ping/Post configuration to orders, invoicing and reporting, using a LeadExec account configured for your verticals.

WEB

www.clickpointsoftware.com

EMAIL

sales@clickpointsoftware.com

PHONE

1 (866) 372-9431

Product documentation: leadexechelp.clickpointsoftware.com