



LeTip Wired - Tips

TIP DASHBOARD - ONLINE

The most used section in LeTip Wired is the "Tips Document" page. It displays when the member selects "Tips" from the LeTip Wired "My Account" menu options. All of their Tip business is archived on their profile (passed and received tips) for future reference. **Using LeTip Wired online, this document will explain how each of the "Tip Dashboard" menu options work.**

LeTip Wired Tips Dashboard

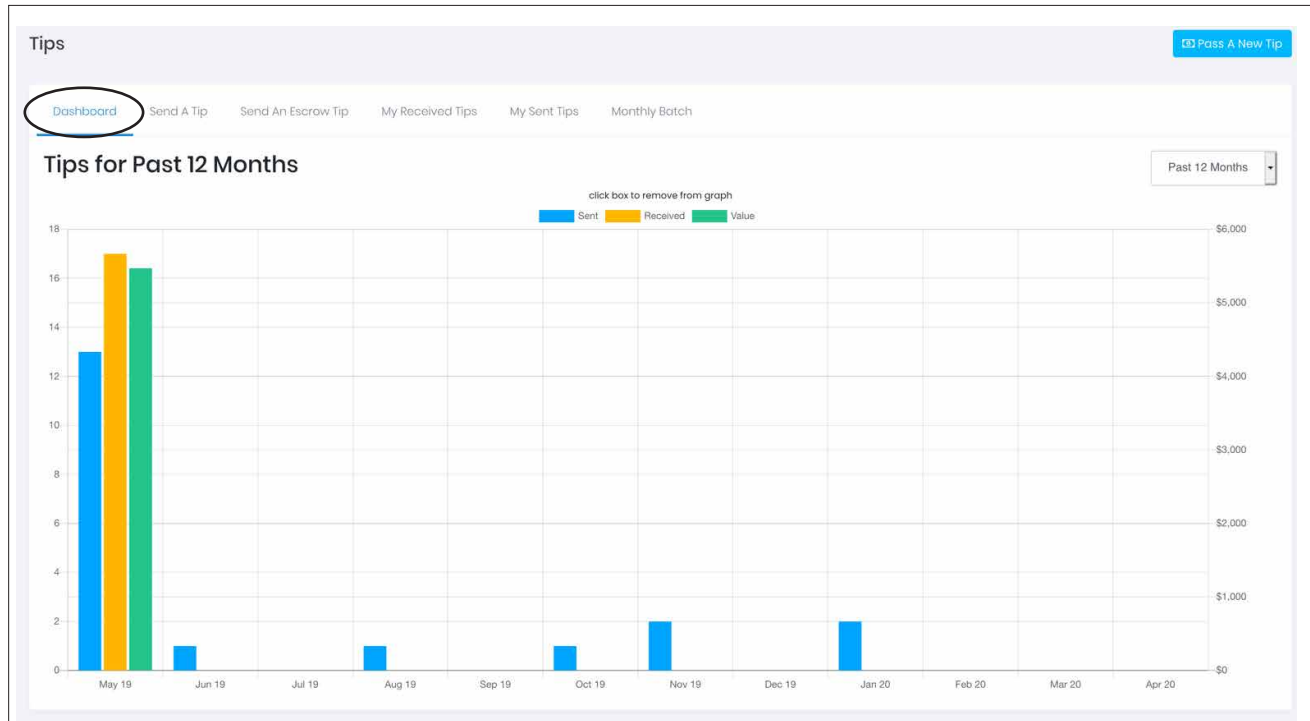


Image 1

The six "Tip Dashboard" menu options are: Dashboard, Send A Tip, Send An Escrow Tip, My Received Tips, My Sent Tips, and Monthly Batch.

Dashboard

The default landing page which displays the member's "Tips for Past 12 Months" and the Tip menu options. Each member has statistics on any tip passed or received through LeTip Wired or LeTip Wired mobile over the past 12 months. If the member assigns a value to their closed tips, the graph will also display the dollar value of their tips generated. (Image 1)

Send A Tip

Where members pass online Tips. This page can be accessed from the Tips menu option, or by clicking the Blue "Pass A New Tip" button on multiple pages in the top right-hand corner (Tip Dashboard, My Profile and My Chapter). Find the chapter member whom the Tip is for and click the Green "Send Tip" button to pull up the Tip Form. Tips for an unfilled category (in the member's chapter) can be sent to another LeTip member by using the search options to search other chapters or by category. **Instructions on how to "Send A Tip" can be found in the Document Library inside the LeTip Wired Tips Instructions folder.**

Send An Escrow Tip

The "Send An Escrow Tip" menu option is used when members have Tips for a categories their chapter

does not have filled. Members fill out an Escrow Tip Form which is on the "Send An Escrow Tip" page. (Image 2)

Select the category the Tip is for, then fill in the Tip Details box. Send the Escrow Tip to the chapter by clicking the Blue "Submit Tip" button. Members then know which category has business waiting and whom to invite to the next meeting.

Escrow Tips are not passed out until a new member joins the chapter under the pending category.

The TipMaster checks with the member who sent the Escrow Tip, to verify the lead is still valid. If the Escrow Tip is no longer active, the TipMaster then cancels the pending Escrow Tip.

Image 2

My Received Tips

The "My Received Tips" menu option displays the member's Tips that were passed through LeTip Wired. Member's received tips are archived to their profile and can be searched by a selected date range or status. Received Tips can be exported to a CVS document and opened in Microsoft Excel and also printed.

A Tip can be edited by the member and TipMaster (Image 3a) and they can assign a value to the Tip and the Tip's status. Single Tips, or the Tips the member would like to print, can be printed out by checking the small white box in the top right-hand corner of the Received Tip. **Instructions on "My Received Tips" can be found in the Document Library inside the LeTip Wired Tips Instructions folder.**

Start Date	End Date	Status
		Select...

[Export CSV](#) [Print All](#)

Tip For	Tip From	Person To Contact	Phone	Email	Company	Details	Tip Type	Value	Status	Private Tip
05/26/2019 ☐	Scott Jones Executive Offices	Paul Della Valle Corporate Communications	Jerome Fokas +1 732-207-2336	---	---	boat insurance	Inside	\$415	Closed	Yes
05/25/2019 ☐	Scott Jones Executive Offices	Kim Marie Branch-Pettid Banker	Neil Lipson +1 631-307-6460	marcja@comcast.net	---	New fuel line for 2013 F150	Outside	\$318	Closed	Yes
05/25/2019 ☐	Scott Jones Executive Offices	Kim Marie Branch-Pettid Banker	Scott spivic +1 732-741-5800	---	Hidden Treasure	Envelopes for WWP outing	Inside	\$9	Closed	Yes
05/24/2019 ☐	Scott Jones Executive Offices	Chris Ayoub Computer Programmer	Greg Luhn +1 206-949-5219	---	---	Nikolas visit Kristine on Monday	Outside	\$325	Closed	Yes

Image 3

Image 3a

Edit Tip

My Sent Tips

This option is the member's "Sent Tips" archive. Every Tip they've passed through LeTip Wired online or through LeTip Wired mobile application are kept here.

Like "My Received Tips" the member can access any Tip passed by a date range or status and the ability to export and print selected Tips.

They can edit individual Tips by selecting the Blue "Edit Tip" button (Image 3a) to add a value and Tip status.

Instructions on "My Sent Tips" can be found in the Document Library inside the LeTip Wired Tips Instructions folder.

The screenshot shows the 'My Sent Tips' section of a web application. At the top, there's a navigation bar with links: Dashboard, Send A Tip, Send An Escrow Tip, My Received Tips, My Sent Tips (highlighted), and Monthly Batch. Below the navigation bar, there are filters for Start Date, End Date, and Status. There are buttons for 'Export CSV' and 'Print All'. The main area displays three tip cards. Each card shows the tip for a specific person (Robert Calabrese, Mark Vedette, Evan Pulsipher) and the tip from Scott Jones. It includes contact information (Person To Contact, Phone, Email) and company details (LeTip International Corp Office). The 'Details' section contains a narrative of the tip. At the bottom of each card, there's a table for 'Tip Type' and 'Value', and a blue 'Edit Tip' button.

Image 3a

Edit Tip

Monthly Batch

The "Monthly Batch" menu option is set up for members that are not able to report individual Tip values due to their company guidelines and privacy laws.

Here the member can create a Tip Batch, (Image 4) which is the total value of all their Tips combined for the month or multiple transactions in one total. This way the Tip values are still included in the chapter Tip totals and the member has still complied with their company security guidelines and privacy laws.

Example Tip Batch:

Date 4/17/20 Value \$1,500.00
Notes field (3 Tips closed) - Test Batch for April

The screenshot shows the 'Create Tip Batch' form. It has a title bar with a close button. The form contains fields for 'Batch Date' (04/16/2020) and 'Value' (with a dollar sign icon). There is a 'Notes' field with a text area. At the bottom, there are 'Cancel' and 'Create Batch' buttons.

Image 4

Click the Blue "Create Batch" button to submit the Tip Batch. Monthly Batch Example (Image 4a)

The screenshot shows the 'Monthly Batch' section of a web application. At the top, there's a navigation bar with links: Dashboard, Send A Tip, Send An Escrow Tip, My Received Tips, My Sent Tips, and Monthly Batch (highlighted). Below the navigation bar, there's a 'Create New Batch' button. The main area shows a table with one record. The table has columns for Batch Date, Value, and Notes. The record shows a batch date of 04/17/2020, a value of \$1,500, and notes '3 Tips closed - (Test Batch for April)'.

	Batch Date	Value	Notes
1	04/17/2020	\$1,500	3 Tips closed - (Test Batch for April)

Image 4a