Admin Guide for Lead-Xpress

Table of Contents

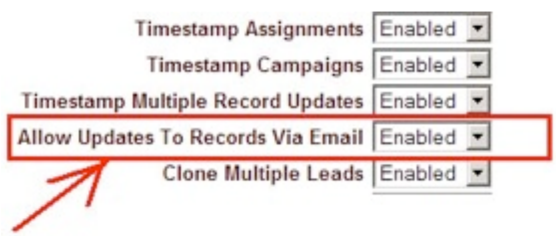
Enabling Lead-Xpress

Lead-Xpress is easy to enable.

Access **Administration > Manage Workgroups**.

Then select **Edit** for the appropriate workgroup.

Next, select **Enabled** from the dropdown for **Allow Updates to Records Via Email**.



From the workgroup perspective, that's all there is to it. Now you need to set up the sales reps and / or partner reps.

If your sales reps and / or partner reps already have logon access to LeadMaster and an email address, then there is nothing more you need to do. You are ready to request updates to accounts / records / leads in LeadMaster.

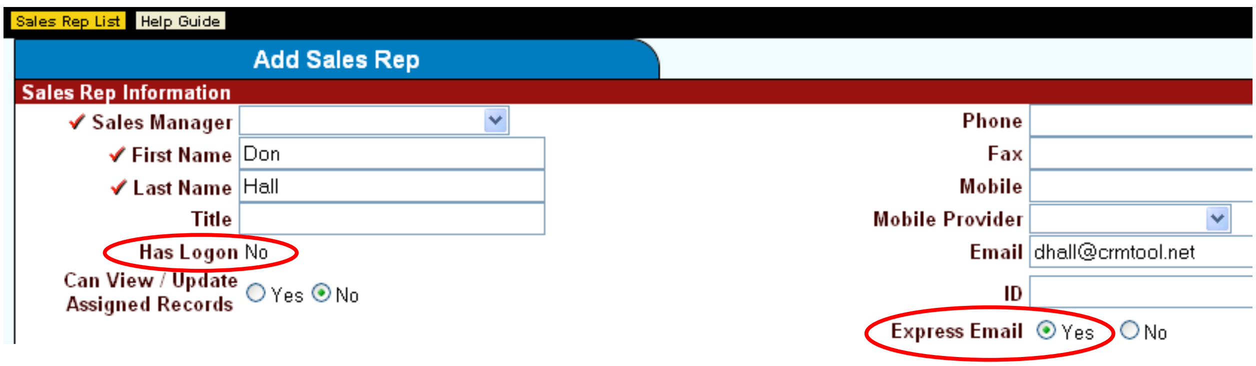
If your sales reps and / or partner reps will not have logon access to LeadMaster, you need to create new Lead-Xpress users for your sales reps and partner reps.

Creating new Lead-Xpress Users

You can either set up Lead-Xpress users individually, or you can import them in a group.

Adding New Lead-Xpress Users Individually

Go to **Administration > Sales Reps** or **Partner Reps** (Both can be configured as Lead-Xpress users)
> Add Sales Rep



Fill out your sales rep's info and click **Submit**.

Points to remember:

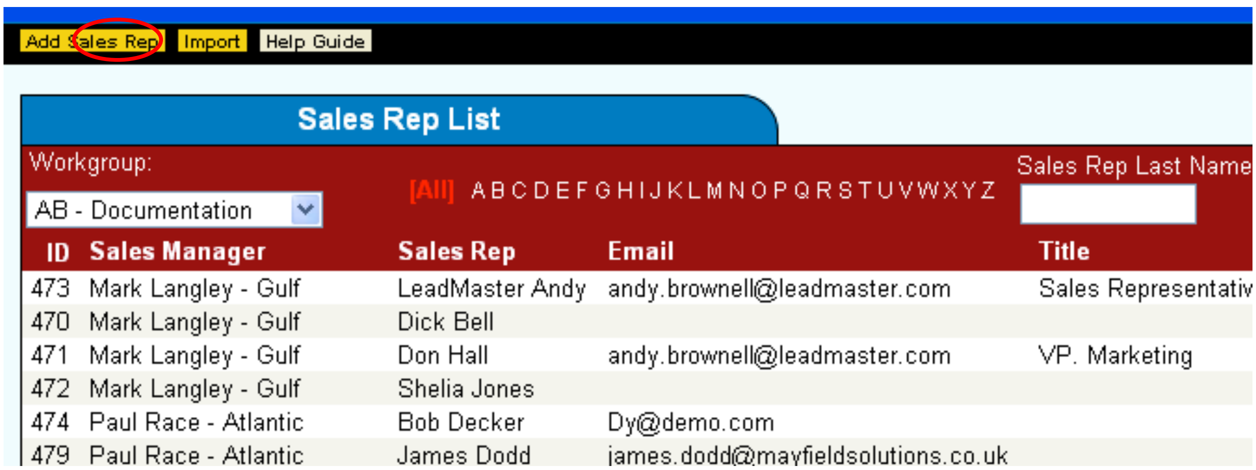
- **Has Logon** should show **No**. Lead-Xpress users don't have logon access to LeadMaster. If **Has Logon** shows **Yes,** the next section, **Can View / Update Assigned Records**, will not appear. (Users with traditional logons can always view / update assigned records.)
- Provided that **Has Logon shows No,** make sure that **Can View / Update Assigned Records** is set to **Yes**.
- Be sure to enter your sales rep's **email address.** Sales reps will receive notifications of record assignments and requests to update records via email.
- Providing your sales rep's mobile number and **mobile provider** will allow the system to send the sales rep a text message through workflow automation.
- **Express Email** does not need to be set to **Yes**, but if it isn't the sales rep won't receive email notification of record assignments. For example, suppose the sales rep is part of a round robin lead distribution. They won't receive email notification of new records assigned to them unless **Express Email** is set to **Yes.** They will receive requests to update records via email provided the option **Can View / Update Assigned Records** is set to **Yes.**

Importing a Group of Sales Reps

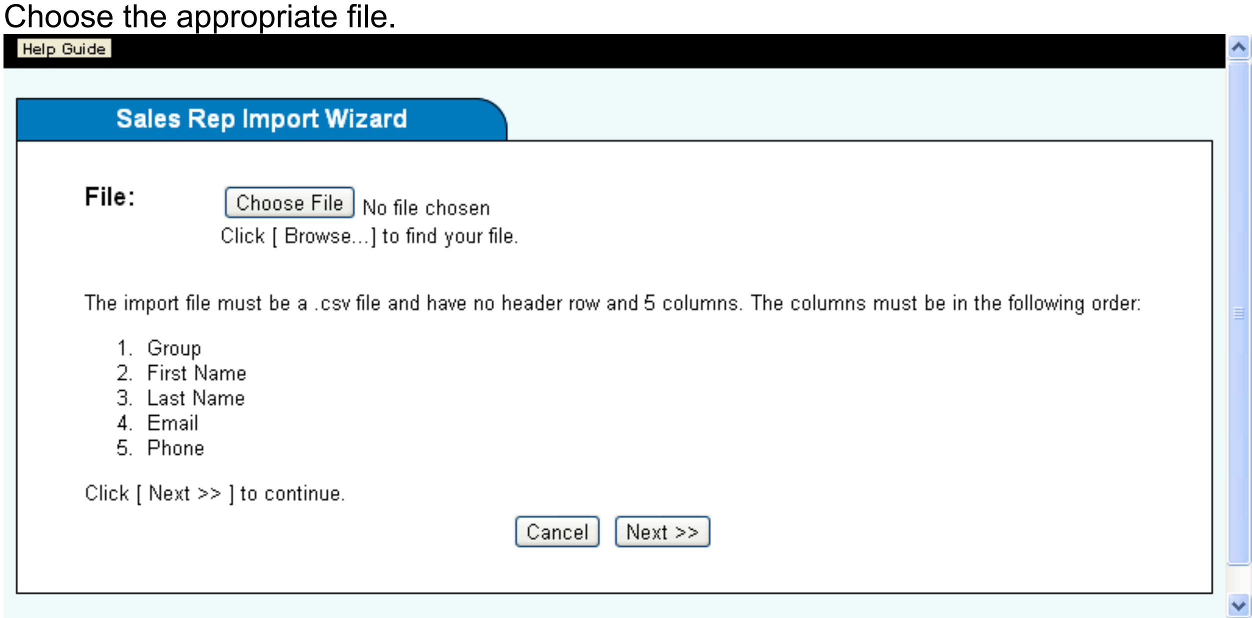
You'll need to create a .CSV file. Using a spreadsheet or database format your file as follows:

1. No header row.
2. 5 columns containing the following, respectively:
   Group, First Name, Last Name, Email, Phone
   Please note: any of these labels may be customized on your system.

Next, go to **Administration** > **Sales Reps** and Select **Import.**



Choose the appropriate file.



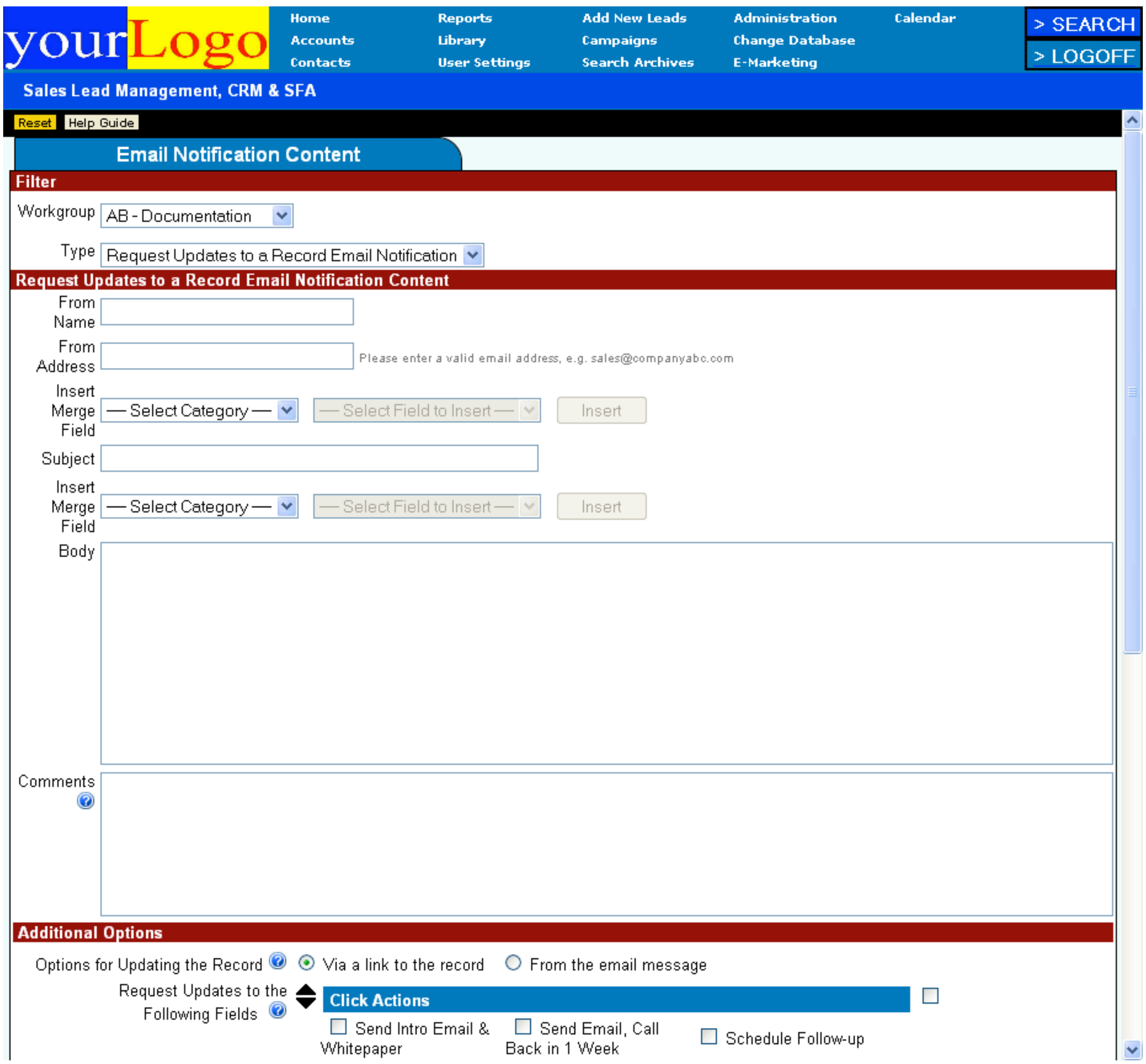
Once the .csv file is loaded, select **Edit** for each sales rep and select **Yes** to **Can View/Update Assigned Records** to enable each sales rep to receive requests to update records (see the image on page 3).

Customizing Email Requests to Update Records

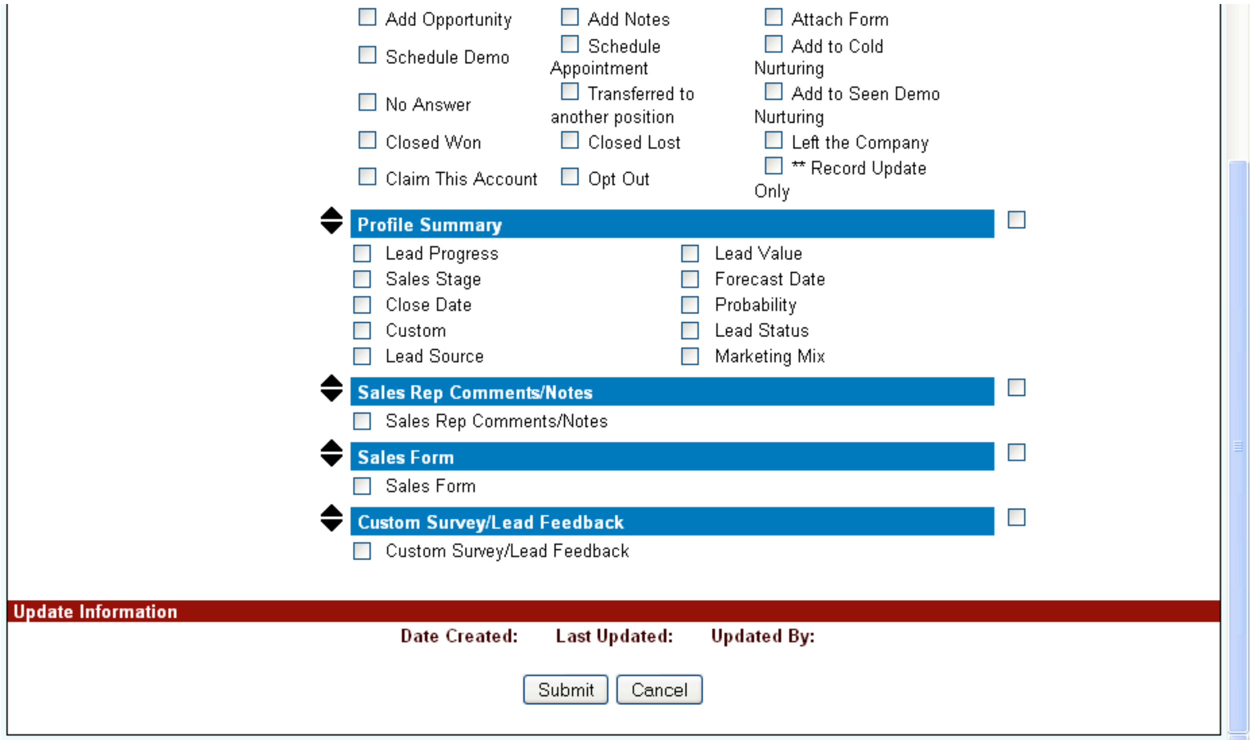
Go to **Administration** > **Email Notification Content**.

- Select the appropriate Workgroup.
- Select **Record Assignment Email Notification** under **Type.**

You will notice the content below changing to match the selected **Type**.

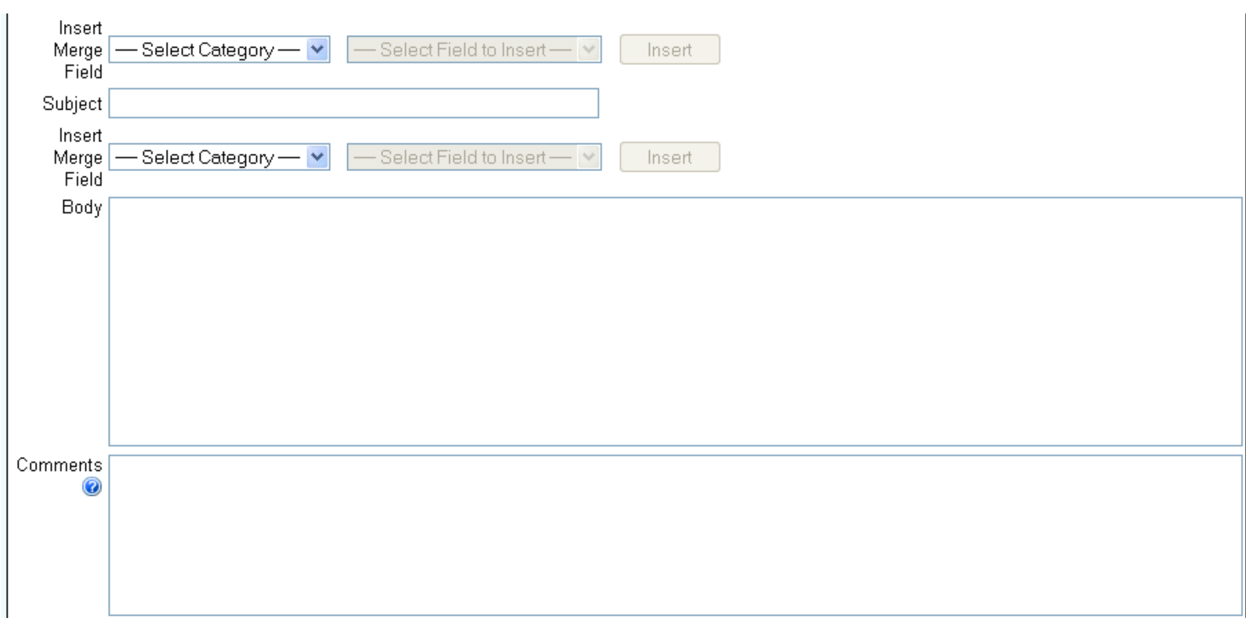


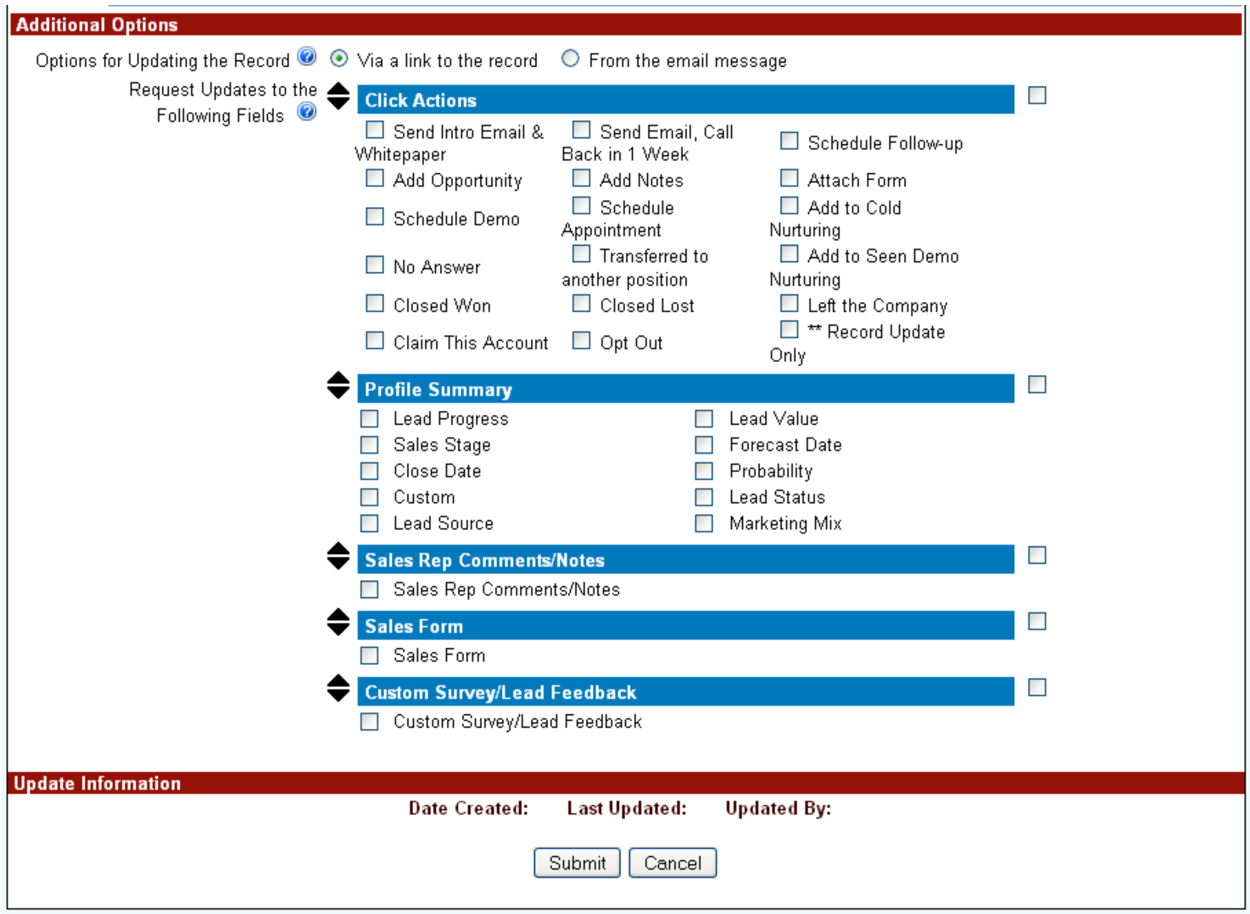
LEADMASTER



Customize the subject of the email; you can use the first **Insert Merge Field** to include information from the record in the subject.

Customize the body of the email; you can utilize the second **Insert Merge Field** to include information from the record in the body of the email.





Additional Options

Options for Updating the Record ◉ Via a link to the record ○ From the email message

Request Updates to the Following Fields

Click Actions

- Send Intro Email & Whitepaper
- Send Email, Call Back in 1 Week
- Schedule Follow-up
- Add Opportunity
- Add Notes
- Attach Form
- Schedule Demo
- Schedule Appointment
- Add to Cold Nurturing
- No Answer
- Transferred to another position
- Add to Seen Demo Nurturing
- Closed Won
- Closed Lost
- Left the Company
- Claim This Account
- Opt Out
- ** Record Update Only

Profile Summary

- Lead Progress
- Lead Value
- Sales Stage
- Forecast Date
- Close Date
- Probability
- Custom
- Lead Status
- Lead Source
- Marketing Mix

Sales Rep Comments/Notes

- Sales Rep Comments/Notes

Sales Form

- Sales Form

Custom Survey/Lead Feedback

- Custom Survey/Lead Feedback

Update Information

Date Created: Last Updated: Updated By:

Submit Cancel

Scroll down to **Additional Options.**

- **Options for Updating the Record**: Select one of the two choices to
  - Embed the form within the email or
  - To provide a link to the form.

- **Checkboxes:** Select appropriate sections and fields to appear in the form your sales reps will see when they update the record.

Please note, depending upon how you have your checkboxes configured in the Click Actions section, not all checkboxes will function as configured. For example, suppose you want to schedule an appointment or callback using one of the checkboxes. This is a common LeadMaster function making it quick and easy to schedule a call back for tomorrow or the next day etc. However, Lead-Xpress users don't have logon access to LeadMaster and therefore don't have a LeadMaster calendar. So that checkbox won't work for Lead-Xpress users.

Assigning Records with Email Notification & Request for Update

There are two ways to request an update to records; either through a **Request to Update Records** or when **Assigning Records.**

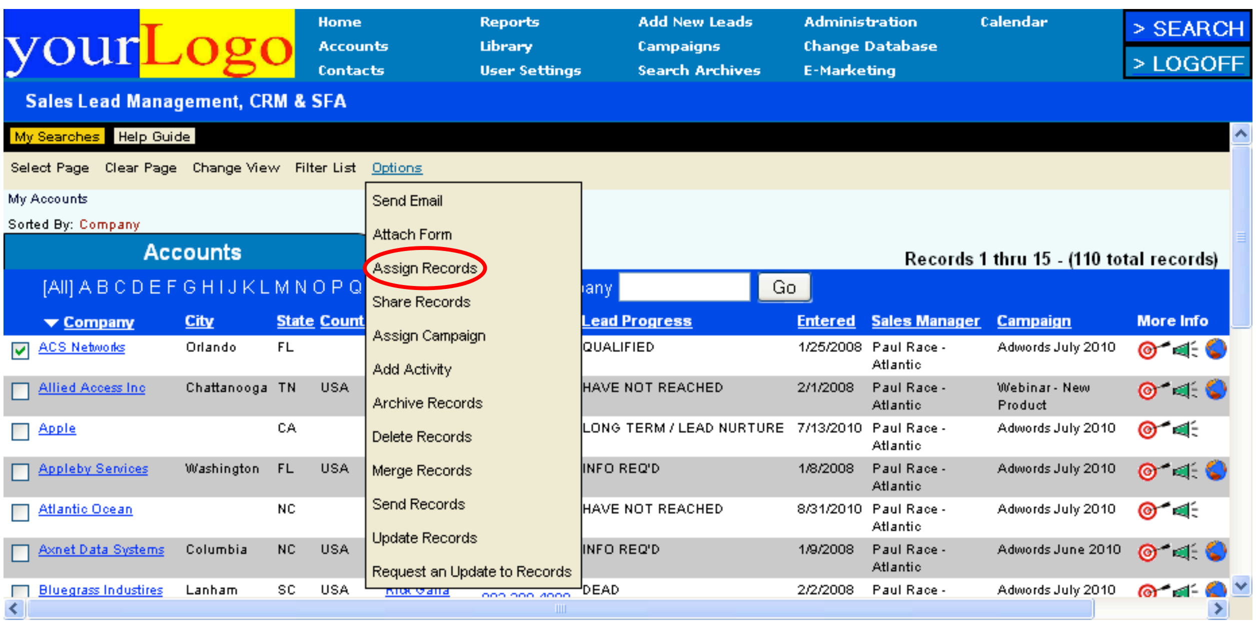
This is how you can **Request an Update** when **Assigning Records**.

The first step is to find the records you want. Select your desired records (via the **Accounts** page or from the Search Results page by using the search engine and **searching** using your specific criteria).

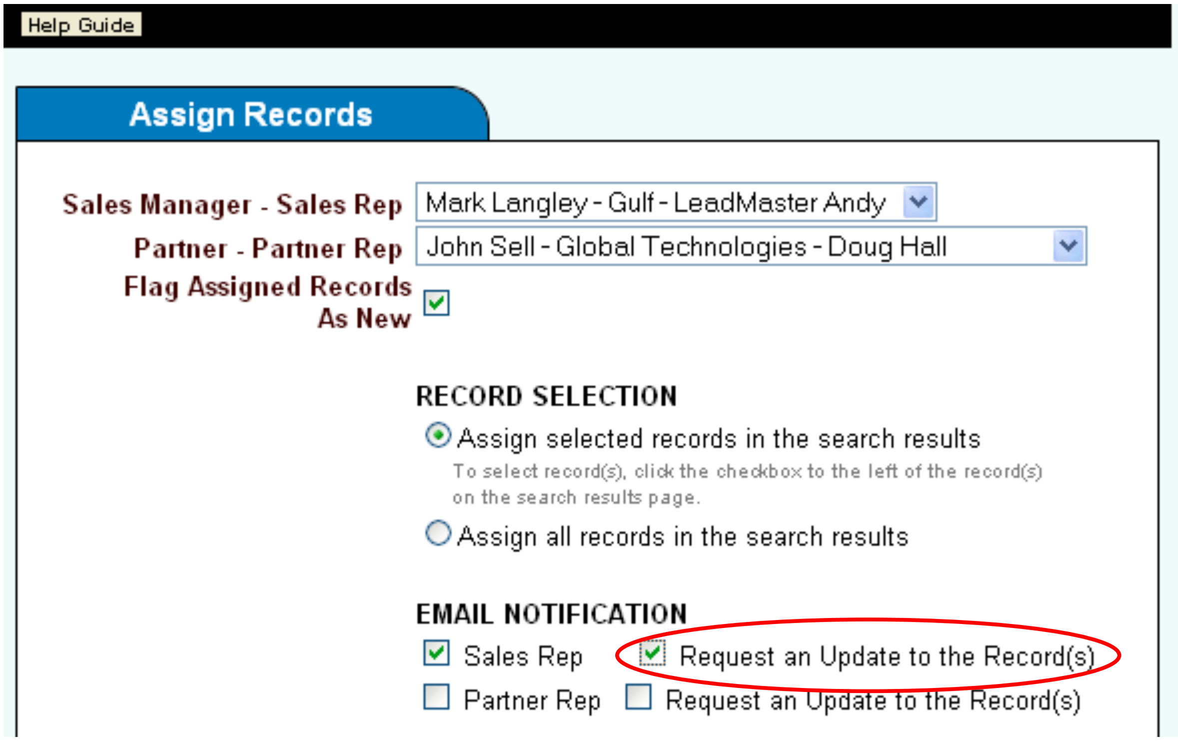
You can either select all of the records or you can select the records individually by putting a checkmark to the left of the record.

Once the records have been selected it is time to assign them.

Scroll over **Options** and select **Assign Records**.



This will open the **Assign Records** page.



At this point you can

- Select the sales rep you'd like to assign the record(s) to
- Assign all the records or just the ones you've selected with a checkmark
- Select email notification to the sales rep / partner rep; request an update to the record(s) or both
    - You can send an email notification to the sales rep, the partner rep or both.

Please note, when you check **Request an Update to Record(s)** it will automatically put a checkmark next to Sales Rep / Partner Rep because they'll be receiving this request via email.

That's all there is to requesting an update when assigning records.

Requesting Updates to Records via Lead-Xpress

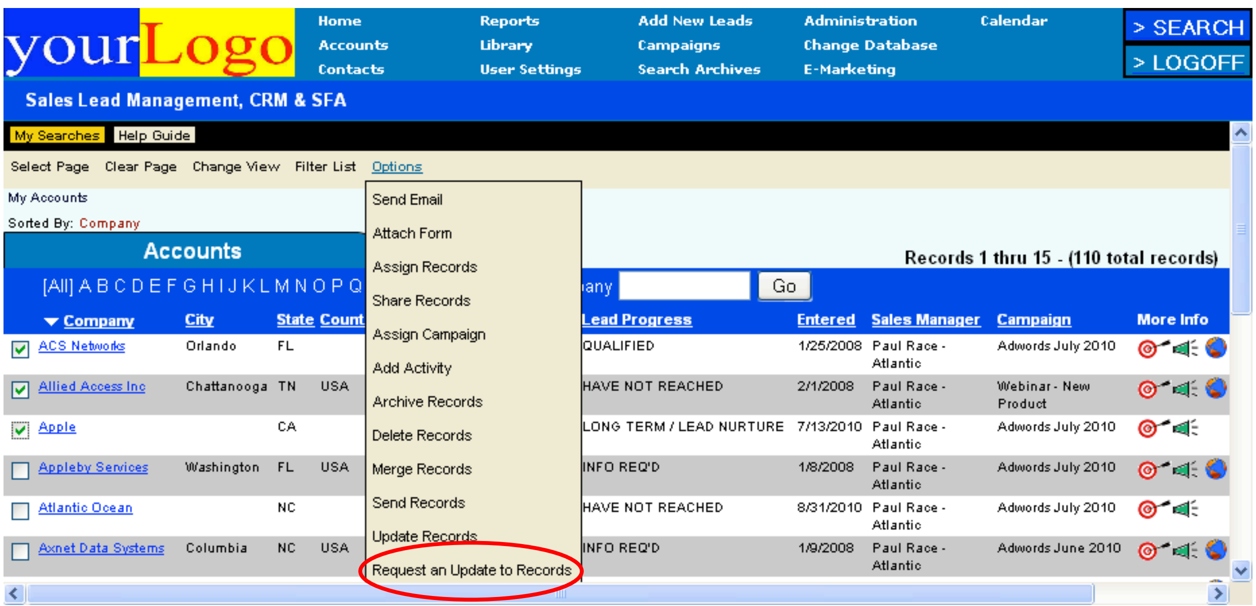
This is how you can **Request an Update** after the records have been assigned.

The first step is to find the records you want. Select your desired records (via the **Accounts** page or from the Search Results page by using the search engine and **searching** using your specific criteria).

You can either select all of the records or you can select the records individually by putting a checkmark to the left of the record.

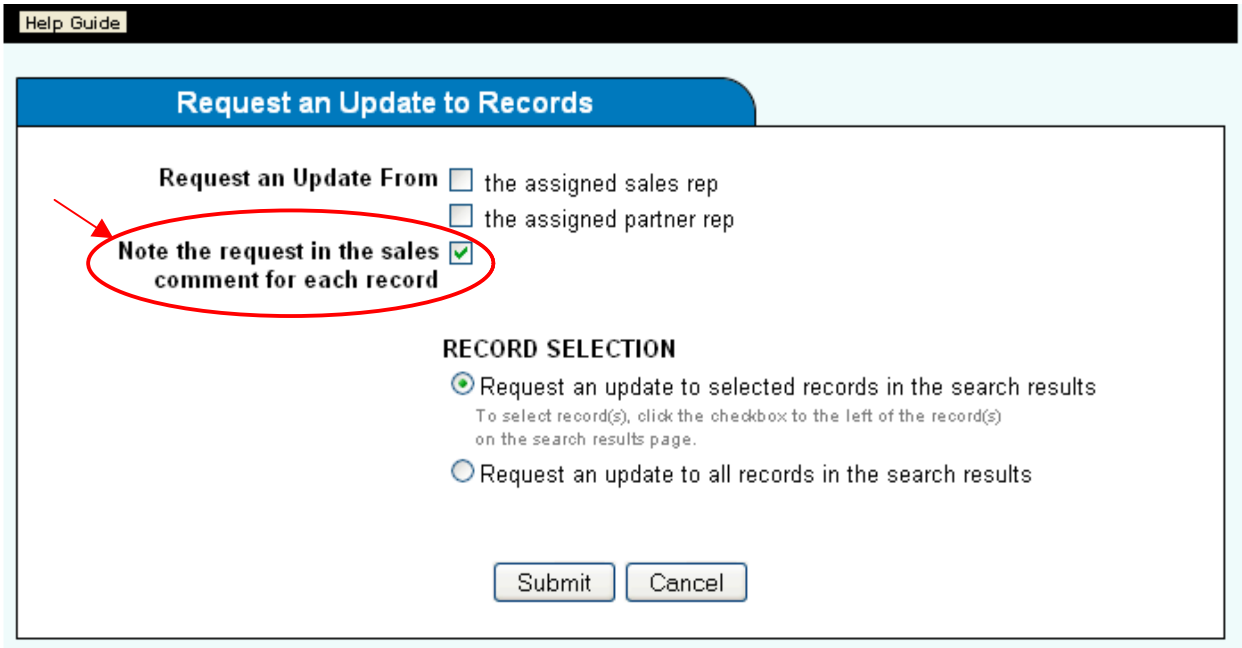
Once the records have been selected it is time to **Request an Update to Records**.

Scroll over **Options** and select **Request an Update to Records**.



At this point you can

- Request an update from the sales rep, the partner rep or both
- Request an update for all the records or just the ones you've selected with a checkmark
- Note the request in the **Sales Comment** area of each record.



Managers with logon privileges will be able to review the speed with which the records were updated through LeadMaster reports. Charts on the LeadMaster dashboard are updated in real-time so that managers have an up-to-date view of the business.