



Admin Guide for Lead-Xpress

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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**.

A screenshot of a settings interface with five rows of dropdown menus. Each row has a label on the left and a dropdown menu on the right. The labels are: "Timestamp Assignments", "Timestamp Campaigns", "Timestamp Multiple Record Updates", "Allow Updates To Records Via Email", and "Clone Multiple Leads". All dropdown menus are currently set to "Enabled". A red rectangular box highlights the "Allow Updates To Records Via Email" row, and a red arrow points to the dropdown menu in that row.

Timestamp Assignments	Enabled
Timestamp Campaigns	Enabled
Timestamp Multiple Record Updates	Enabled
Allow Updates To Records Via Email	Enabled
Clone Multiple Leads	Enabled

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.

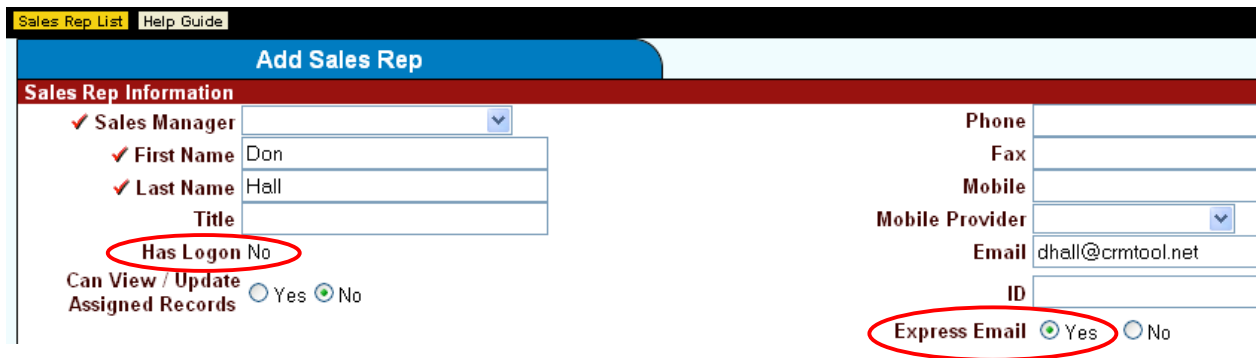
Creating new Lead-Xpress Users

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**.

Navigation: Add Sales Rep (circled in red), Import, Help Guide

Sales Rep List

Workgroup: ABCDEFGHIJKLMNOPQRSTUVWXYZ

ID	Sales Manager	Sales Rep	Email	Title
473	Mark Langley - Gulf	LeadMaster Andy	andy.brownell@leadmaster.com	Sales Representativ
470	Mark Langley - Gulf	Dick Bell		
471	Mark Langley - Gulf	Don Hall	andy.brownell@leadmaster.com	VP. Marketing
472	Mark Langley - Gulf	Shelia Jones		
474	Paul Race - Atlantic	Bob Decker	Dy@demo.com	
479	Paul Race - Atlantic	James Dodd	james.dodd@mayfieldsolutions.co.uk	

Choose the appropriate file.

Navigation: Help Guide

Sales Rep Import Wizard

File: No file chosen
Click [Browse...] to find your file.

The import file must be a .csv file and have no header row and 5 columns. The columns must be in the following order:

1. Group
2. First Name
3. Last Name
4. Email
5. Phone

Click [Next >>] to continue.

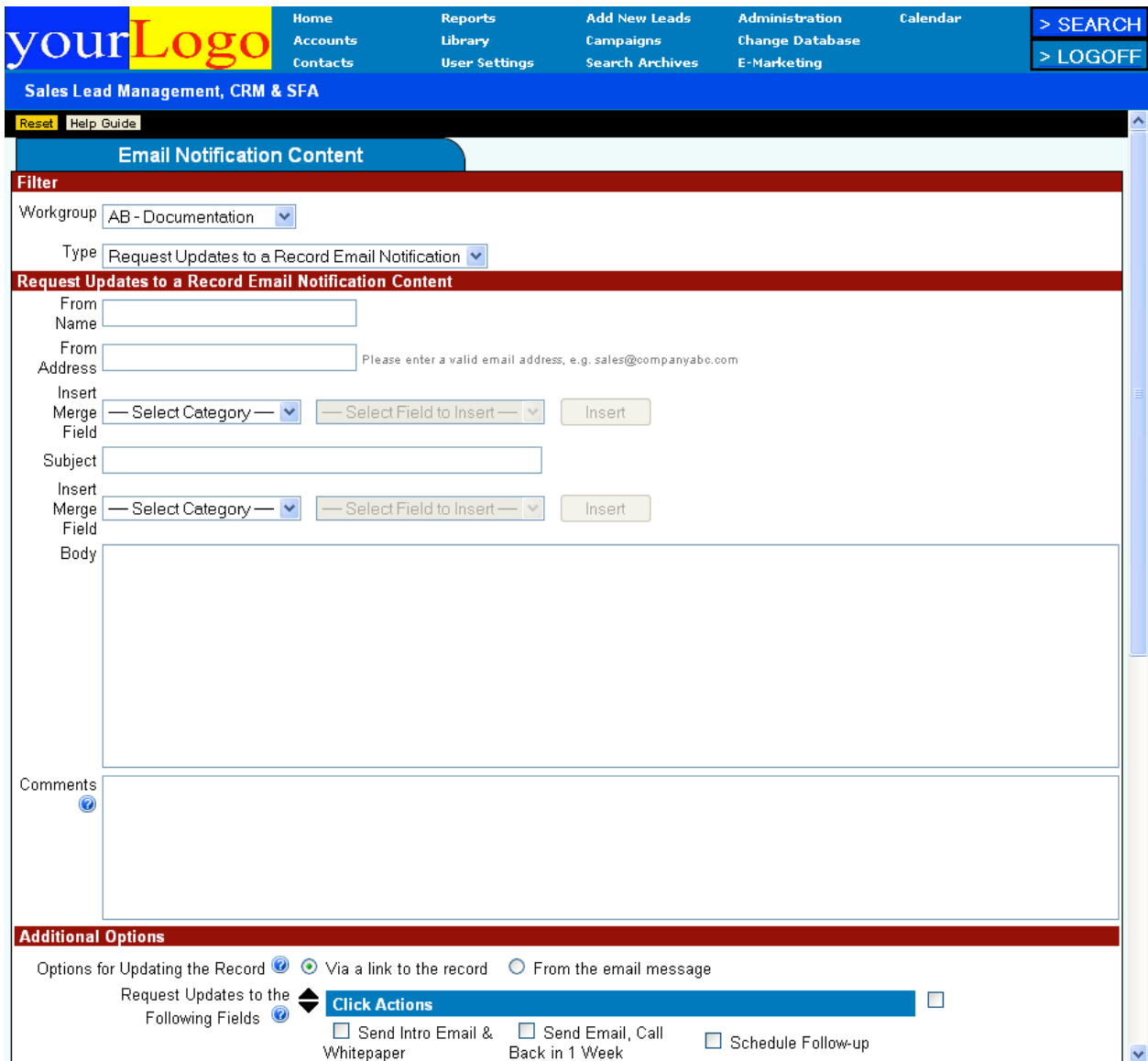
Once the .csv file is loaded, select **Edit** for each sales rep and select **Yes** to **Can View/Update Assigned Records** to enable each sales rep to receive requests to update records (see the image on page 3).

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**.



The screenshot shows the 'Email Notification Content' configuration page. At the top is a navigation menu with 'Home', 'Reports', 'Add New Leads', 'Administration', and 'Calendar'. Below this is a blue header with 'yourLogo' and 'Sales Lead Management, CRM & SFA'. The main content area is titled 'Email Notification Content' and includes a 'Filter' section with 'Workgroup' set to 'AB - Documentation' and 'Type' set to 'Request Updates to a Record Email Notification'. Below the filter is a section titled 'Request Updates to a Record Email Notification Content' with fields for 'From Name', 'From Address', 'Subject', and 'Body'. There are also 'Insert Merge Field' buttons with dropdown menus for 'Select Category' and 'Select Field to Insert'. At the bottom, there is an 'Additional Options' section with radio buttons for 'Via a link to the record' (selected) and 'From the email message', and a 'Click Actions' section with checkboxes for 'Send Intro Email & Whitepaper', 'Send Email, Call Back in 1 Week', and 'Schedule Follow-up'.

LEADMASTER

<input type="checkbox"/> Add Opportunity	<input type="checkbox"/> Add Notes	<input type="checkbox"/> Attach Form
<input type="checkbox"/> Schedule Demo	<input type="checkbox"/> Schedule Appointment	<input type="checkbox"/> Add to Cold Nurturing
<input type="checkbox"/> No Answer	<input type="checkbox"/> Transferred to another position	<input type="checkbox"/> Add to Seen Demo Nurturing
<input type="checkbox"/> Closed Won	<input type="checkbox"/> Closed Lost	<input type="checkbox"/> Left the Company
<input type="checkbox"/> Claim This Account	<input type="checkbox"/> Opt Out	<input type="checkbox"/> ** 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:

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.

Insert Merge Field:

Subject:

Insert Merge Field:

Body:

Comments:

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**

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

Profile Summary

<input type="checkbox"/> Lead Progress	<input type="checkbox"/> Lead Value
<input type="checkbox"/> Sales Stage	<input type="checkbox"/> Forecast Date
<input type="checkbox"/> Close Date	<input type="checkbox"/> Probability
<input type="checkbox"/> Custom	<input type="checkbox"/> Lead Status
<input type="checkbox"/> Lead Source	<input type="checkbox"/> 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:

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**.

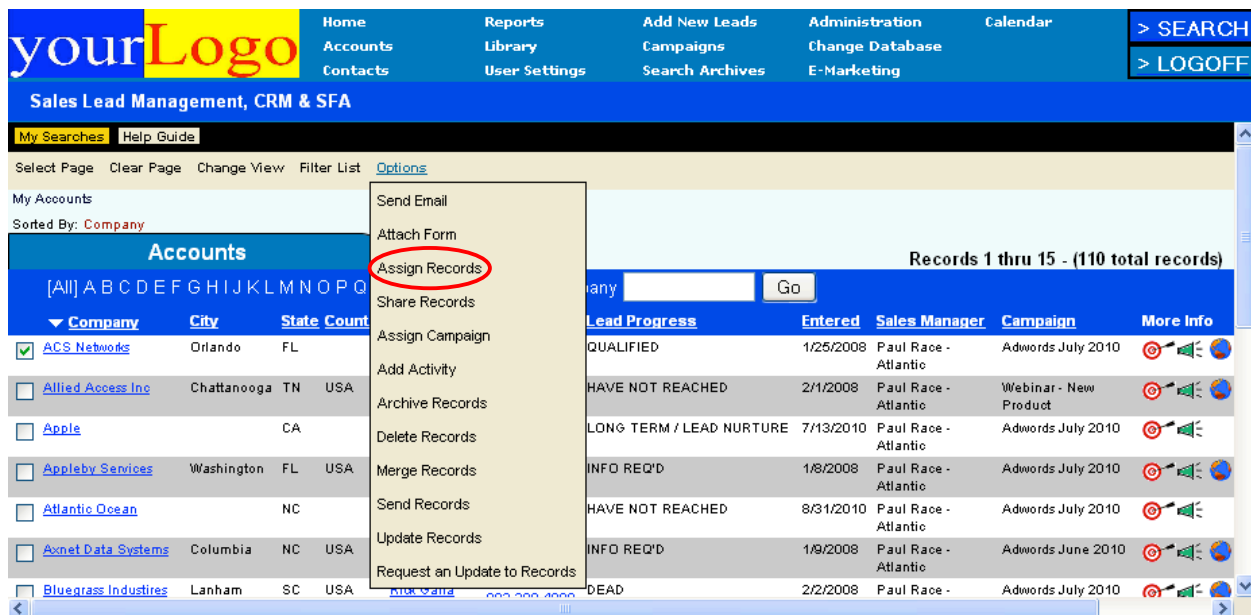
This is how you can **Request an Update** when **Assigning Records**.

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**.



The screenshot shows the LeadMaster web application interface. At the top, there is a navigation bar with links for Home, Accounts, Reports, Add New Leads, Administration, and Calendar. Below this is a search bar and a 'LOGOFF' button. The main content area is titled 'Sales Lead Management, CRM & SFA' and contains a table of accounts. The table has columns for Company, City, State, and Count. A dropdown menu is open over the 'Options' column, and the 'Assign Records' option is highlighted with a red circle. The table also shows a list of records with columns for Lead Progress, Entered, Sales Manager, Campaign, and More Info.

Company	City	State	Count	Options
<input checked="" type="checkbox"/> ACS Networks	Orlando	FL		Send Email Attach Form Assign Records Share Records Assign Campaign Add Activity Archive Records Delete Records Merge Records Send Records Update Records Request an Update to Records
<input type="checkbox"/> Allied Access Inc	Chattanooga	TN	USA	
<input type="checkbox"/> Apple		CA		
<input type="checkbox"/> Appleby Services	Washington	FL	USA	
<input type="checkbox"/> Atlantic Ocean		NC		
<input type="checkbox"/> Axnet Data Systems	Columbia	NC	USA	
<input type="checkbox"/> Bluegrass Industries	Lanham	SC	USA	

Lead Progress	Entered	Sales Manager	Campaign	More Info
QUALIFIED	1/25/2008	Paul Race - Atlantic	Adwords July 2010	
HAVE NOT REACHED	2/1/2008	Paul Race - Atlantic	Webinar - New Product	
LONG TERM / LEAD NURTURE	7/13/2010	Paul Race - Atlantic	Adwords July 2010	
INFO REQ'D	1/8/2008	Paul Race - Atlantic	Adwords July 2010	
HAVE NOT REACHED	8/31/2010	Paul Race - Atlantic	Adwords July 2010	
INFO REQ'D	1/9/2008	Paul Race - Atlantic	Adwords June 2010	
DEAD	2/2/2008	Paul Race - Atlantic	Adwords July 2010	

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

Help Guide

Assign Records

Sales Manager - Sales Rep Mark Langley - Gulf - LeadMaster Andy ▾

Partner - Partner Rep John Sell - Global Technologies - Doug Hall ▾

Flag Assigned Records As New

RECORD SELECTION

Assign selected records in the search results
To select record(s), click the checkbox to the left of the record(s) on the search results page.

Assign all records in the search results

EMAIL NOTIFICATION

Sales Rep Request an Update to the Record(s)

Partner Rep Request an Update to the Record(s)

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

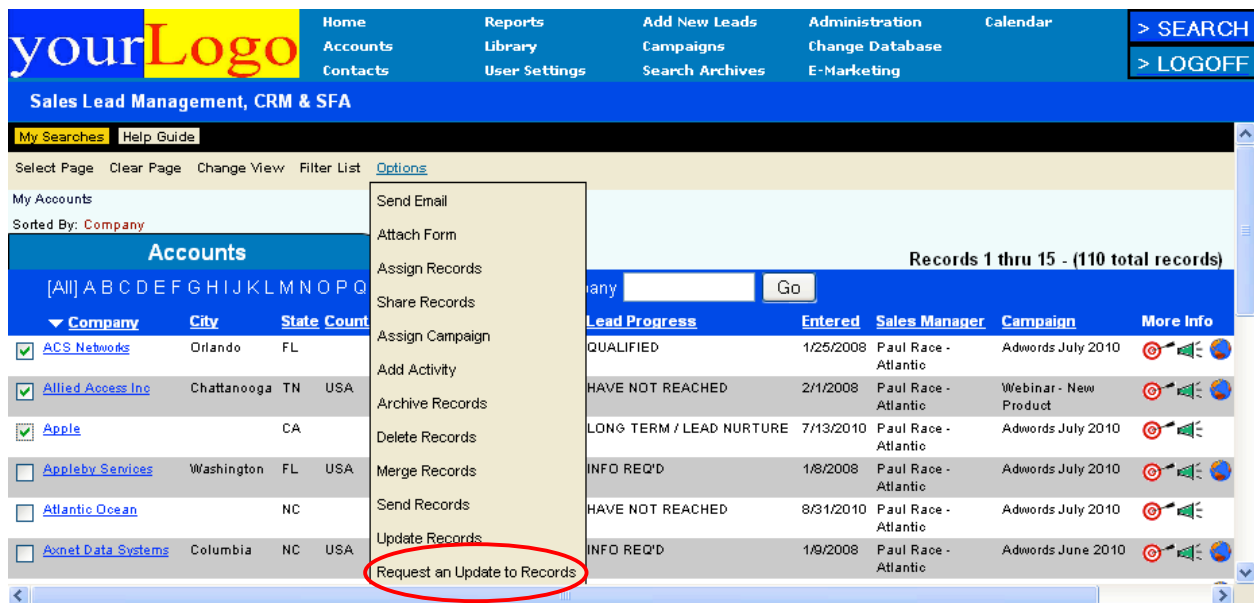
This is how you can **Request an Update** after the records have been assigned.

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**.



The screenshot shows the Lead-Xpress interface. At the top, there is a navigation bar with 'yourLogo' and various menu items like Home, Reports, Add New Leads, Administration, and Calendar. Below this is a sub-header 'Sales Lead Management, CRM & SFA'. The main content area is titled 'My Searches' and 'Help Guide'. A search bar is visible with a 'Go' button. The 'Accounts' section is active, showing a list of accounts with columns for Company, City, State, and Count. A dropdown menu is open over the 'Options' column, listing various actions such as 'Send Email', 'Attach Form', 'Assign Records', 'Share Records', 'Assign Campaign', 'Add Activity', 'Archive Records', 'Delete Records', 'Merge Records', 'Send Records', 'Update Records', and 'Request an Update to Records'. The 'Request an Update to Records' option is circled in red. Below the dropdown, a table of records is visible with columns for Lead Progress, Entered, Sales Manager, Campaign, and More Info. The table shows several records with different statuses and dates.

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.

Request an Update to Records

Request an Update From the assigned sales rep
 the assigned partner rep

Note the request in the sales comment for each record

RECORD SELECTION

- Request an update to selected records in the search results
To select record(s), click the checkbox to the left of the record(s) on the search results page.
- Request an update to all records in the search results

Submit

Cancel

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.