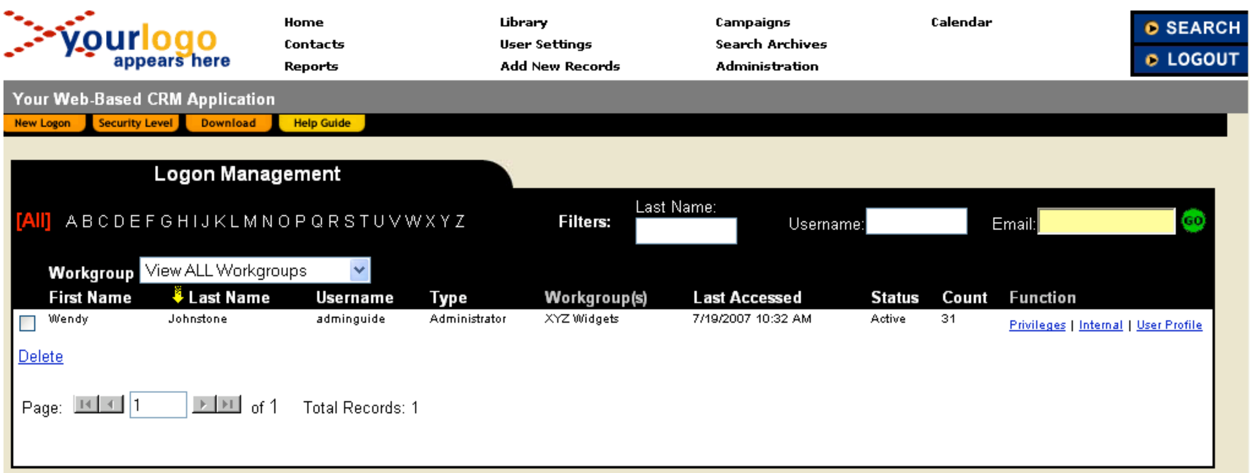
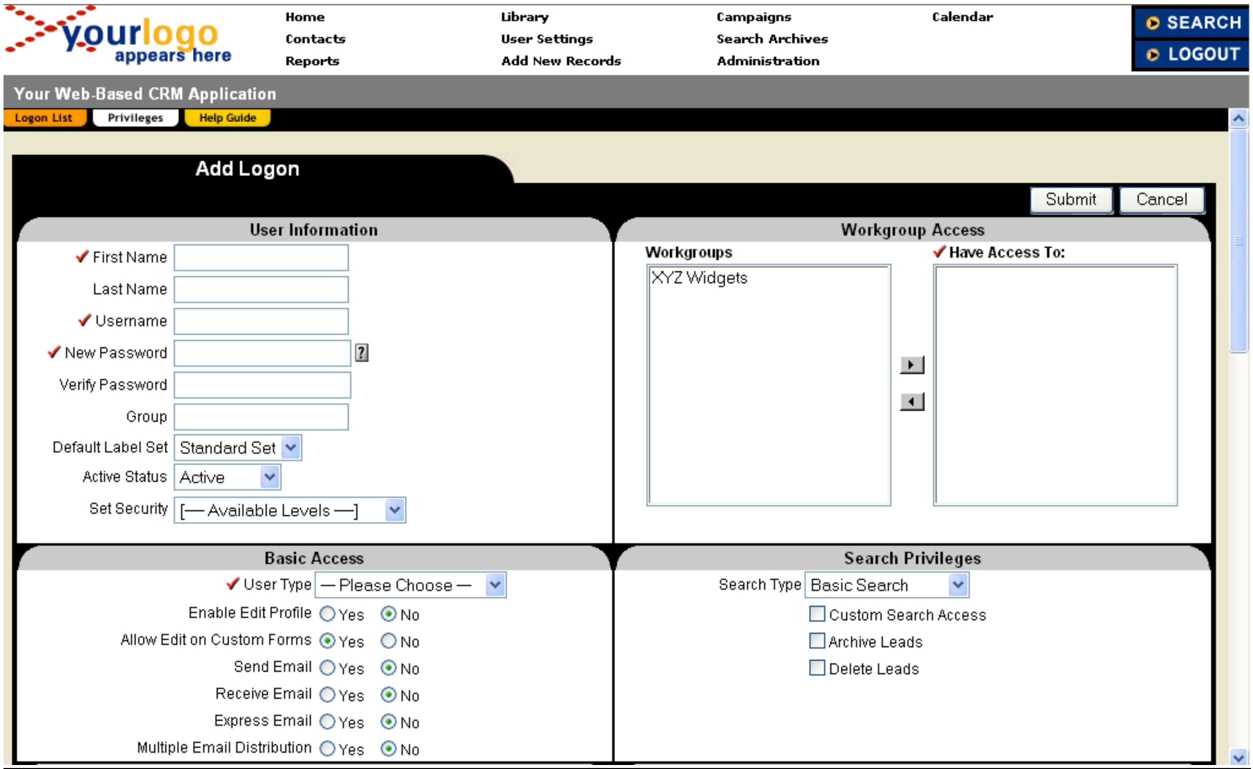
LOGON MANAGEMENT

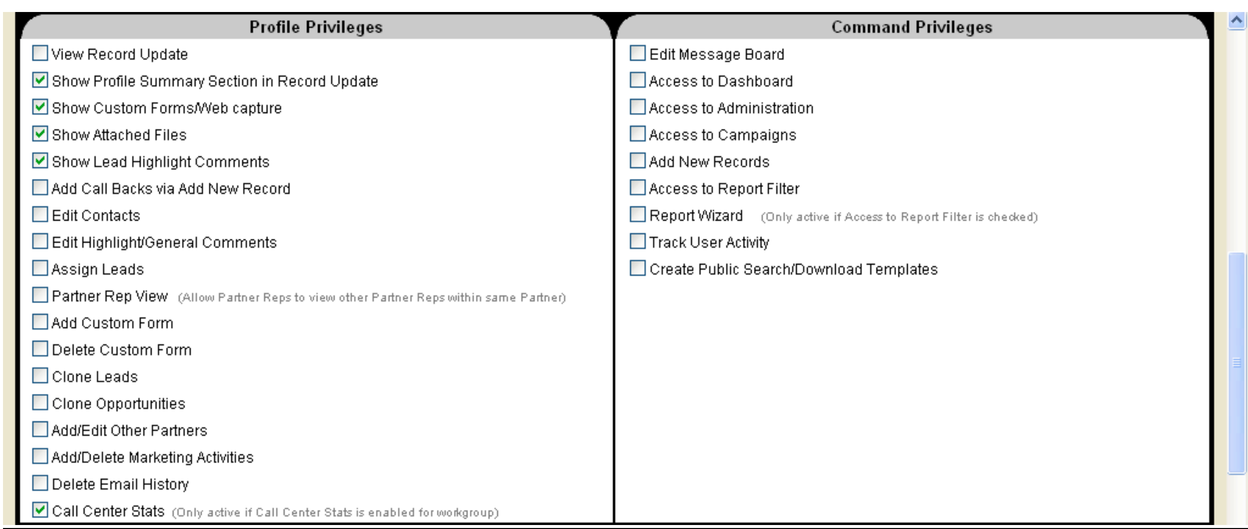
The Logon Management function is where you set up the individual user logons. This can be reached via the Administration function in the top banner of the application. Logons can be Added, Edited and Deleted via this function.

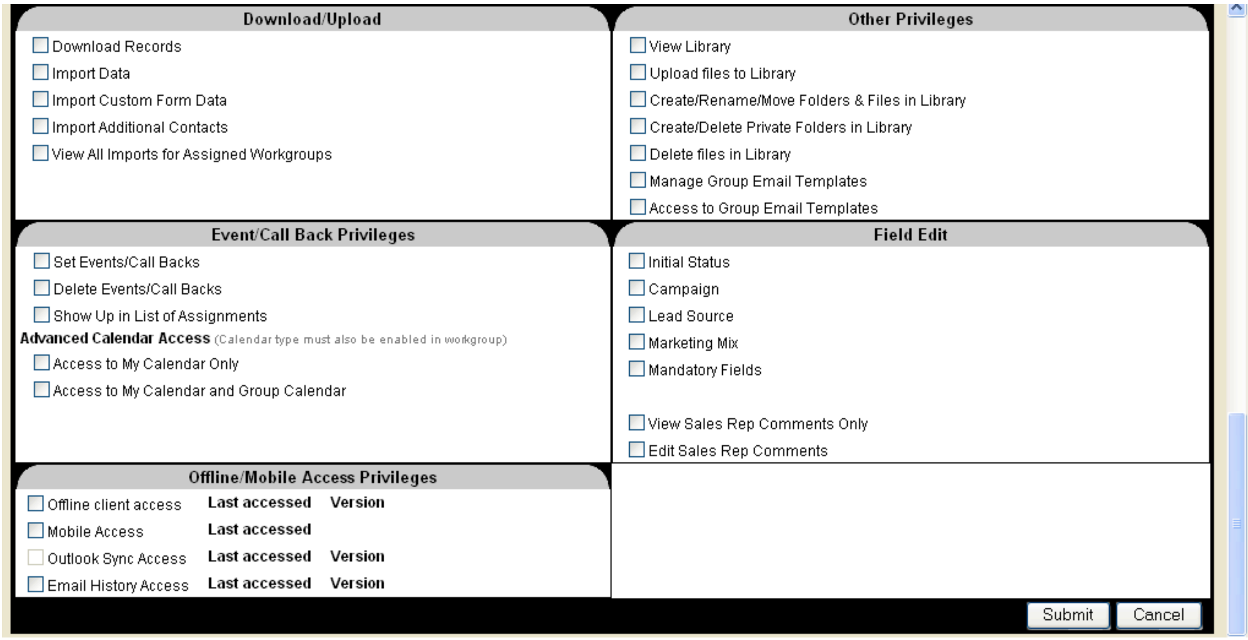
Individual logons can be edited by clicking on the edit hyperlink. In addition, there are two other individual logon screens that define user internal setting [Internal hyperlink] and user profile information [Profile hyperlink]. Below is the main Logon Management screen:



To add a new user logon, click on the New Logon tab on the Logon Management screen:







This screen is for setting up the basic logon information plus user privileges at the individual user level.

Key logon fields:

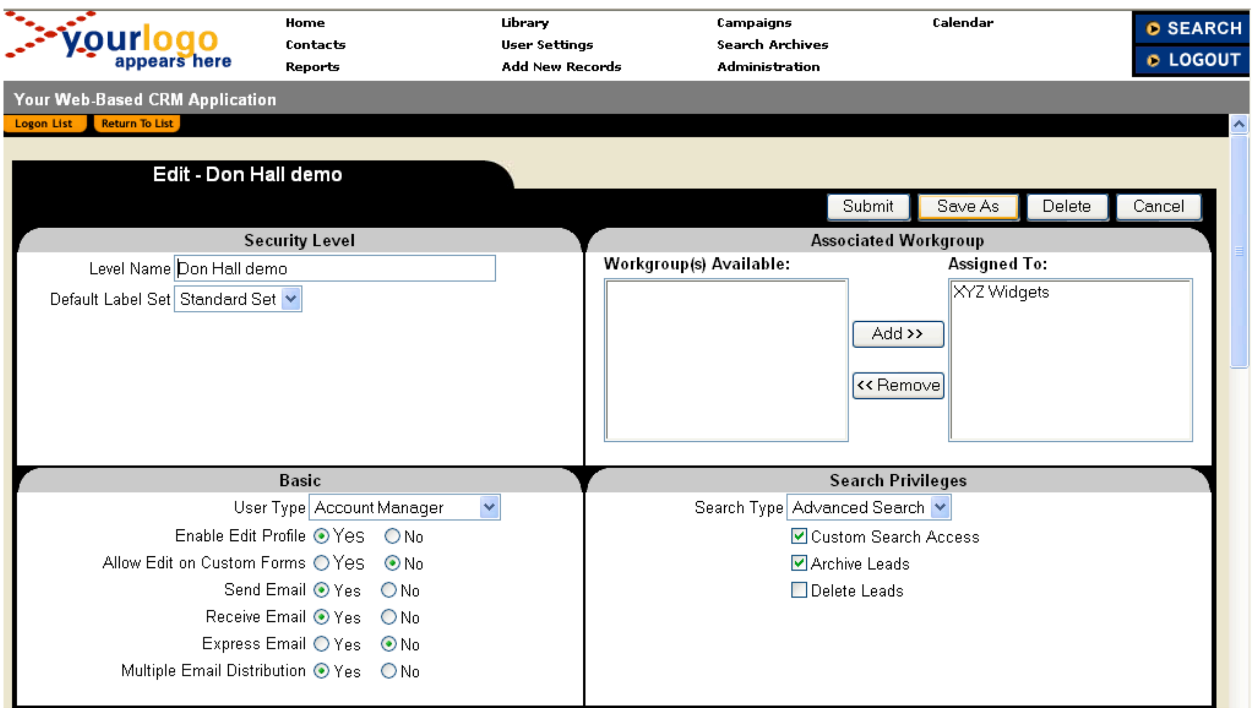
- First/Last Name is the name that appears on the Home Page when user signs in. If the user is being set up at one of the four user levels [Group Contact, Acct Mgr, Partner Contact, Partner Rep] then the First/Last Name in the appropriate level table must exactly match the First/Last Name of their logon record.
- As an example, if a user called Brian Smith is accessing the application at the Acct Mgr level then he must have a record in the Acct Mgr table showing a First/Last Name of Brian Smith and he must also have a logon record that access that workgroup with a User Type of Account Manager.
- Username must be unique (across all users of the application). It is strongly suggested that the users individual email address be used as the Username for uniqueness and ease of remembering one's Username.
- Password can be anything but it is recommended for ease of implementation that the temporary password for all users be set to some common value such as "newuser". The first time the user logs in they will be required to change this initial password setting.
- Group is just for customer identification purpose in order to perhaps identify a group of users within a database.
- Label Set can be set to Standard Set or customized for a particular company(s). This is what is discussed in detail in the Admin function called Custom Labels above.
- Active Status defaults to Active. A user can be temporarily made Not Active that prevents them from logging into the application. The user logon can be deleted by setting the Active Status to Delete – this will make the logon not accessable to the user or the customer admin

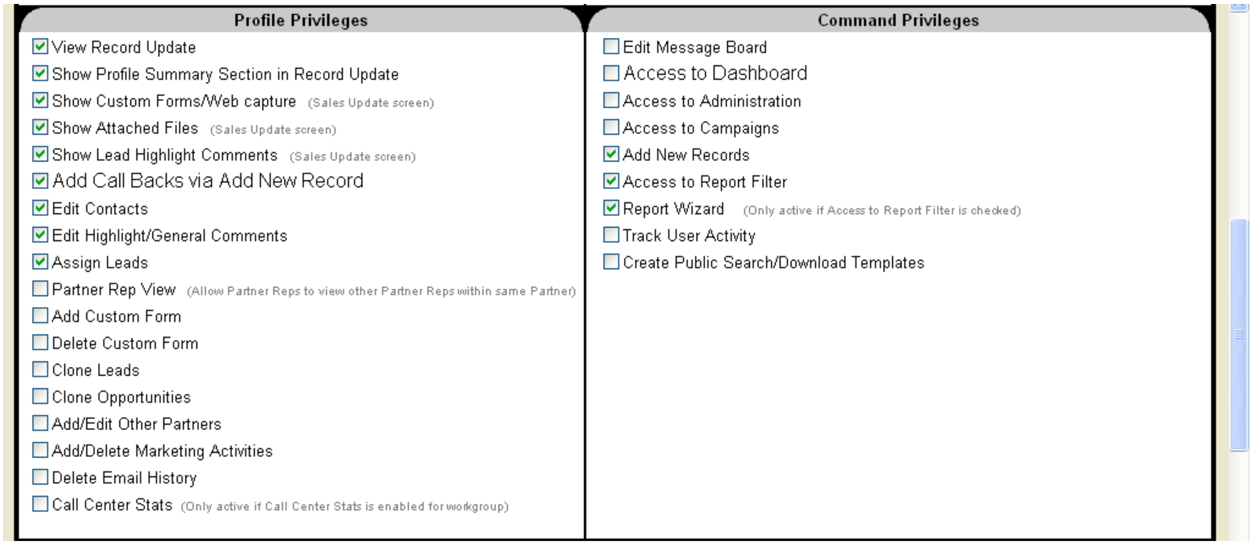
level personnel(s).

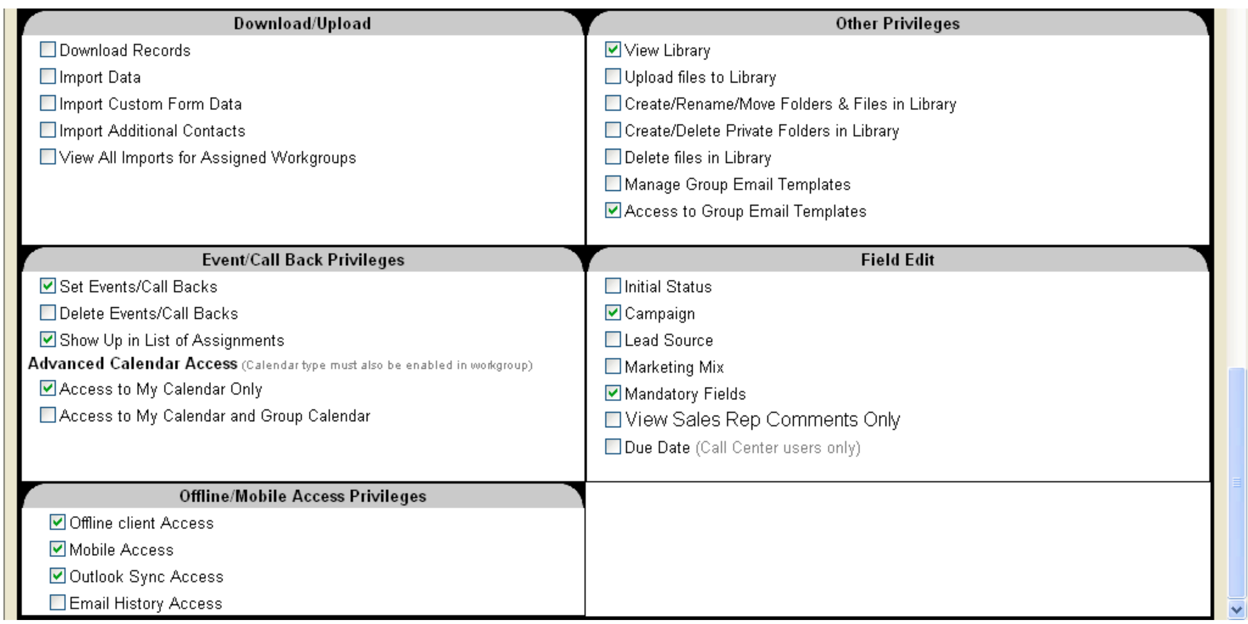
- The Workgroups field allows for the assignment of a user to one or more workgroups via a single logon. Note that logon privileges defined in the Logon Management screen apply to all workgroups that the user is given access to. If a user needs different levels of access to one or more workgroups then multiple logons must be established. NOTE: Only User Type = Administrator can have access to more than one workgroup.
- The table below gives a brief description of the individual privileges in the remaining sections of the Logon Management screen.

In order to help in the set up and standardization of user logons across a workgroup the application has a Security Level template feature that allows you to predefine a set of security privileges for a particular set of users and then use that template when creating future user logons.

The Security Levels template feature can be reached by clicking on the Security Level tab in the upper left-hand corner of the Logon Management screen. The following is the basic Security Level template screen:







The Security Levels template will allow for pre-defining all of the privileges below plus the Label Set and Companies field.

The second column of the table below contains the sample Security Levels setting for an Acct Mgr level user. This table can be expanded to include additional column to define users at the Admin, Global, Group, Partner and Partner Rep levels.

Clone Opportunities	Y	Ability to Clone individual Opportunities within a record
Add/Edit Other Partners	Y	
Add/Delete Marketing Activities	Y	Ability to add/delete Marketing Activities in the Contact screen
Delete Email History	Y	Ability to delete Email History in the Contact screen
Call Center Stats	Y	Turns on the Call Stats section of the Edit Profile screen that allows for recording Call Center Stats every time that the Edit Profile screen is updated (this is what drives the Call Center Stats reports)
Download/Upload Privileges		
Download Reports	Y	Ability to download records from Search Results or Report Filter
Import Data	Y	Ability to Import Data (Either Custom Format or Self-Import Free Format)
Import Custom Form Data	Y	Ability to import Custom Form data via the Import Data routine
Import Additional Contacts	Y	Ability to import Additional Contacts via the Import Data routine (this allows the user to import and match contacts against existing record. If no match on record key a new record will be added, if a match on record key but not contact name then contact will be added to existing record, if match on record key and contact name then import record will be bypassed)
View All Imports for Assigned Workgroups	Y	Ability to see Import Data Log for all imports to authorized Workgroups [Individual users can only see files that they have imported]
Event/Call Back Privileges		
Set Events/Call Backs	Y	Ability to create/modify Events/Call Backs (Calendar function, Home Page hyperlink or individual record)

Default Label Set	Standard Set	Standard Field Tag template
Basic		
User Type	Account Manager	LeadMaster security level for an Account Manager level logon
Enable Edit Profile	Y	Access to Edit Profile tab on Profile (also hyperlink on contact name on Search Results)
Allow Edit on Custom Forms	Y	Allows user to edit fields on custom forms
Send Email	Y	Allows user to send emails from within certain application functions
Receive Email	Y	Receive daily Email Notification (Region, Sales Person, Partner Mgr, Partner Rep only)
Express Email	Y	Receive immediate Email Notification of leads that have been entered and assigned online - single assignment from Profile only [applies only to Acct Mgr and Partner Rep]
Multiple Email Distribution	Y	
Profile Privileges		
View Record Update	Y	Access to Record/ Sales Update tab on Profile
Show Profile Summary Section in Record Update	Y	Ability to turn ON/OFF the Profile Summary section in Record Update screen
Show Custom Forms/Web capture (Record Update screen)	Y	Ability to turn ON/OFF the Custom Forms/Web Capture section in Record Update screen
Show Attached Files (Record Update screen)	Y	Ability to turn ON/OFF the Attached Files section in Record Update screen
Show Lead Highlight Comments (Record Update screen)	Y	Ability to turn ON/OFF the Lead Highlights section in Record Update screen
Add Call Backs via Add New Record	Y	Ability to turn ON/OFF the Call Backs in the Add New Record screen
Edit Contacts	Y	Access to Add Contacts tab on Profile
Edit Highlight/General Comments		Allow user to edit Highlight/General Comments field
Assign Leads	Y	Ability to assign leads to Sales Person and/or Partner Rep (from Add, Edit, Profile, etc.)
Partner Rep View	Y	Allow Partner Reps to view other Partner Reps within same Partner
Add Custom Form	Y	Ability to add a Custom Form on an Add, Profile, etc.
Delete Custom Form	Y	Ability to physically delete an attached Custom Form (form and content can't be retrived)

Security Levels	Sample Level	Comments
Security Level		
Level Name	XYZ Acct Mgr Template	Customer level description assigned by company administrator
Clone Leads	Y	Ability to Clone a Lead on Profile
Delete Events/Call Backs	Y	Ability to delete Events/Call Backs (Calendar function, Home Page hyperlink or individual record)
Show Up in List of Assignments	Y	Display this individual's name in the Assigned To List in the Call Back/Event detail screen
Access to My Calendar Only	Y	Access to My Calendar Only (user will not have access

Outlook Sync Access	Y	Ability to sync user's PC Outlook Contacts and Calendar with their assigned records on the server (requires installation of separate add-on module on user's PC)
Email History Access	Y	Ability to upload Outlook emails from the user's PC to the assigned records on the server (requires installation of separate add-on module on user's PC)
Associated Workgroup		
Workgroup(s) Available	Workgroup A	Workgroups that are assigned to this logon for access (Administration level is the only one that can have more than one assigned workgroup)
Search Privileges		
Search Type	Advanced	Five basic types: Basic, Advanced [Includes Special Interest search areas], Power [Includes Special Interest and CRM search areas, Sales [has special Record Update screen format] and Call Center [this is geared to unique type of Call Center user]
Custom Search Access	Y	Applies only to databases that have customized forms
Archive Leads	Y	Ability to Archive records
Delete Leads	Y	Ability to delete records that have been Archived
Command Privileges		
Edit Message Board	Y	Ability to edit and maintain the Information Center text and Event Tracker
Access to Dashboard	Y	Ability to create and view a number of predefined charts/graphs (charts/graphs appear on Home Page)
Access To Admin		Ability to maintain some application tables
Access to Campaigns	Y	Ability to edit and maintain the detailed Campaign screen
Add New Records	Y	Ability to Add a Lead (via Add New Records function in Home Page banner)
Access to Report Filter	Y	Access to Report Filter (via the Search Results screen)
Report Wizard	Y	Ability to create, store and run basic reports
Track User Activity	Y	Ability to run queries based on workgroups, user types and date range creating a report by user name of User Type, # Logons, # Records Created, # Records Updated (limited to last 60 days)
Create Public Search/Download Templates	Y	Ability to create and save both Public Searches and Download Templates (
		to the Group Calendar but will be able to see all Call Backs/Events for the record assigned to the individual's logon)
Access tp My Calendar and Group Calendar	Y	Access to My Calendar as well as the Group Calendar (will only have access to Call Backs/Events for the records that the individual logon is assigned
Offline/Mobile Access Privilges		
Offline client Access	Y	Ability to download assigned records, work offline and then sync with server (requires installation of separate add-on module on user's PC)
Mobile Access	Y	Ability to access limited records information remotely (requires installation of separate add-on module on user's PC)
Other Privileges		
Create Campaign Questions	Y	

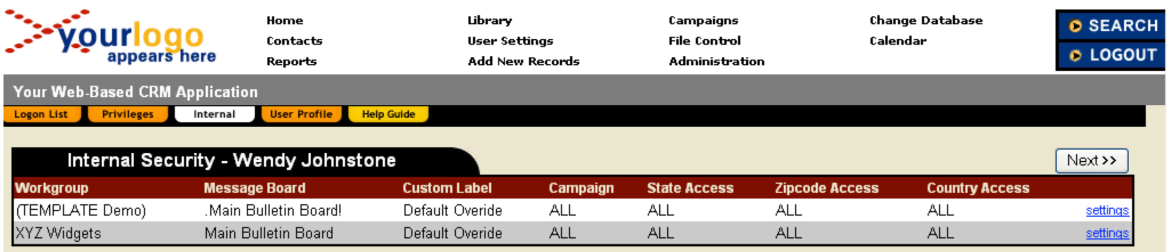
View Library	Y	Allows user to view company Library via banner
Upload files to Library	Y	Allows user to upload new files to the Library [usually an Administrator function]
Create/RenameMove Folders & Files in Library	Y	Allows user to rename files in the Library [usually an Administrator function]
Create/Delete Private Folders in Library	Y	Allows user to create/delete Private Folders in the Library [usually an Administrator function]
Delete files in Library	Y	Allows user to delete files from the Library [usually an Administrator function]
Manage Group Email Templates	Y	Allows user to create/edit/delete Group Email Templates [usually an Administrator function] – this function is accessed via the envelope icon on the Contact Name
Access to Group Email Templates	Y	Allows the user to choose predefined Goup Email Templates when send email the envelope icon on the Contact Name

Initial Status	Y	Allows user to edit the Initial Status field on the Edit Profile and Record Update screens
Campaign	Y	Allows user to edit the Initial Status field on the Edit Profile screen
Lead Source	Y	Allows user to edit the Initial Status field on the Edit Profile and Record Update screens
Marketing Mix	Y	Allows user to edit the Initial Status field on the Edit Profile screen
Mandatory Fields	Y	Gives user access to the Administration/Set Required Fields function to set defined mandatory fields
View Sales Rep Comments Only	Y	Allows user to only view Sales Rep Comments field
Edit Sales Rep Comments	Y	Allows user to edit the current comments in the Sales Rep Comments field
Access to Case Management	Y	Gives user access to Case Management
Field Edit		

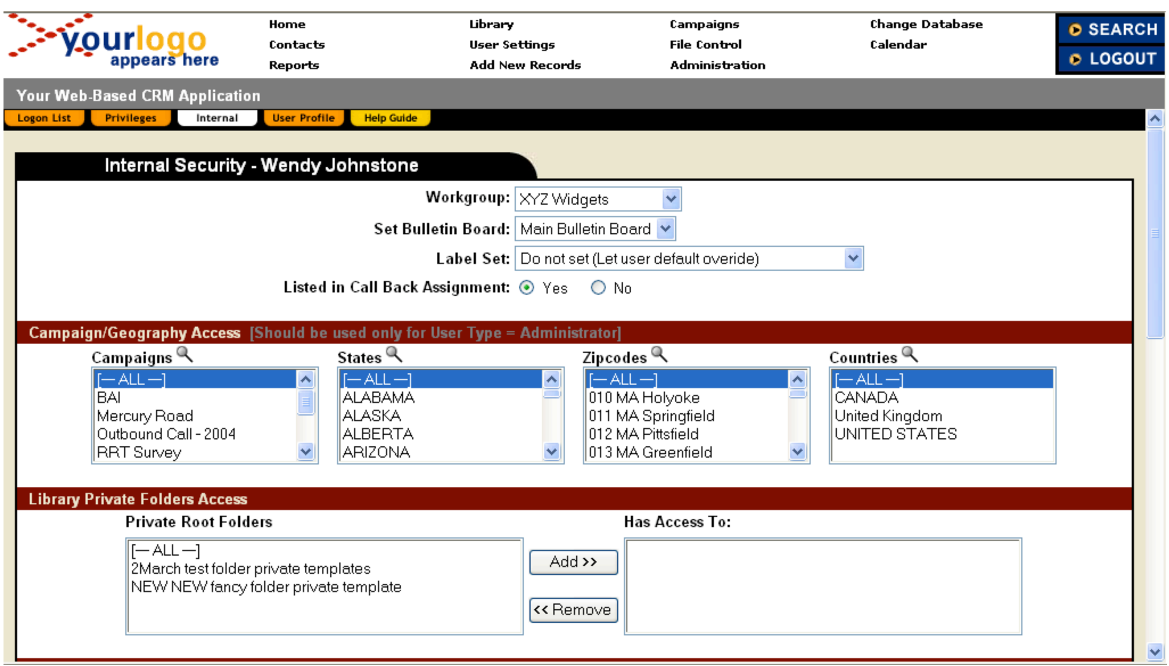
NOTE ➔ Existing Logons can be edited by clicking on the edit hyperlink on the main Logon Management screen.

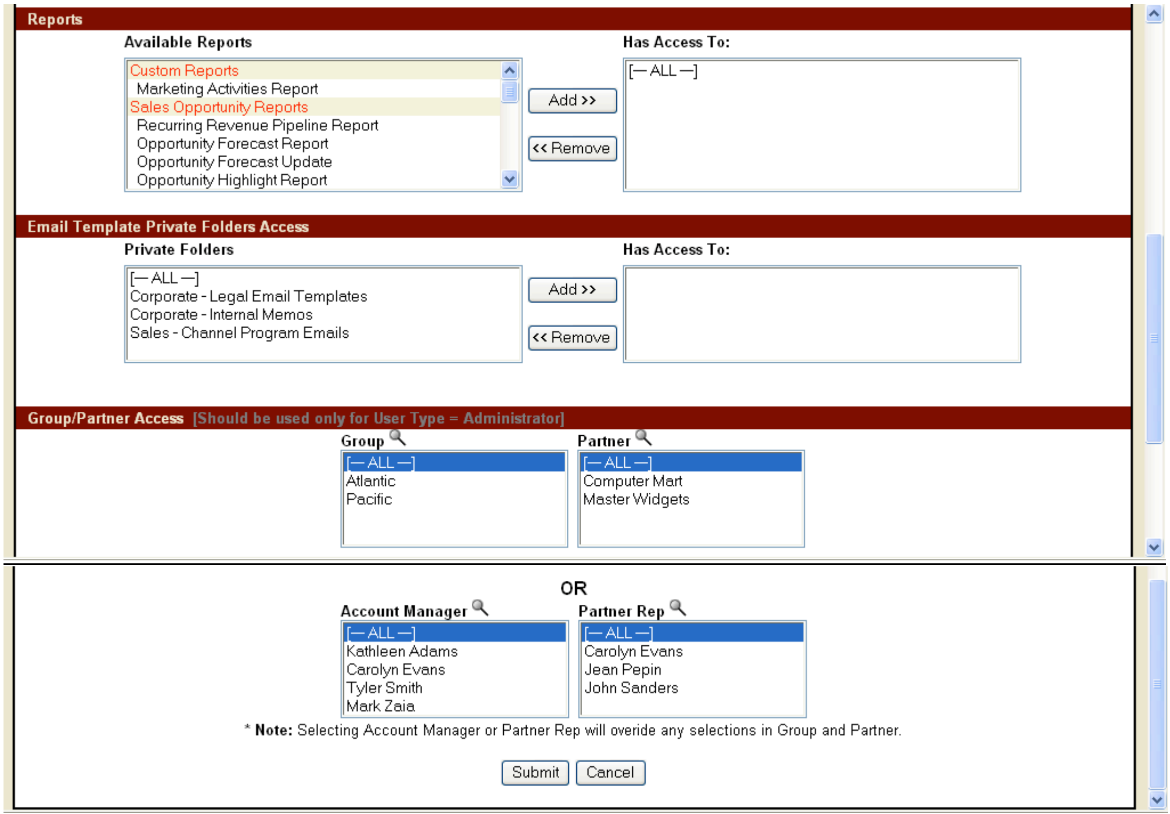
After setting up the basic user logon screen the user will be presented with the Internal Security Logon screen (also available for existing logons by clicking on the Internal hyperlink on the main Logon Management screen) that further sets up the users access to a particular workgroup.

Below is an example of the Internal Security screen. For Admin level logons that have access to more than one workgroup the user will be presented with a "summary" level screen showing all workgroups.
The Internal Security attributes for each workgroup can be viewe by clicking on the settings hyperlink. [If the logon has access to only one workgroup then this screen will not appear and it will automatically display the detailed Internal Security screen below]



The individual Internal Security level can be edited by clicking on the edit hyperlink. Below is an example of the detailed Internal Security level for a single workgroup:





The Set Bulletin Board pull-down establishes what Bulletin Board will be presented to the user when they log into a particular Workgroup via this user logon.

The Label Set pull-down establishes what Label Set will be used for this Logon/Workgroup.

The Campaign/Geography Access function restricts Workgroup access by campaign(s), State(s), Zip code(s) and County(s). Multiple selections can be made by holding down the CTRL key for individual selection or the SHIFT key for range selection.

NOTE → These additional restrictions are usually used only at the Global workgroup level since access at the Group, Acct Mgr, Partner, Partner Rep level are already restricted to only those records assigned to that particular level.

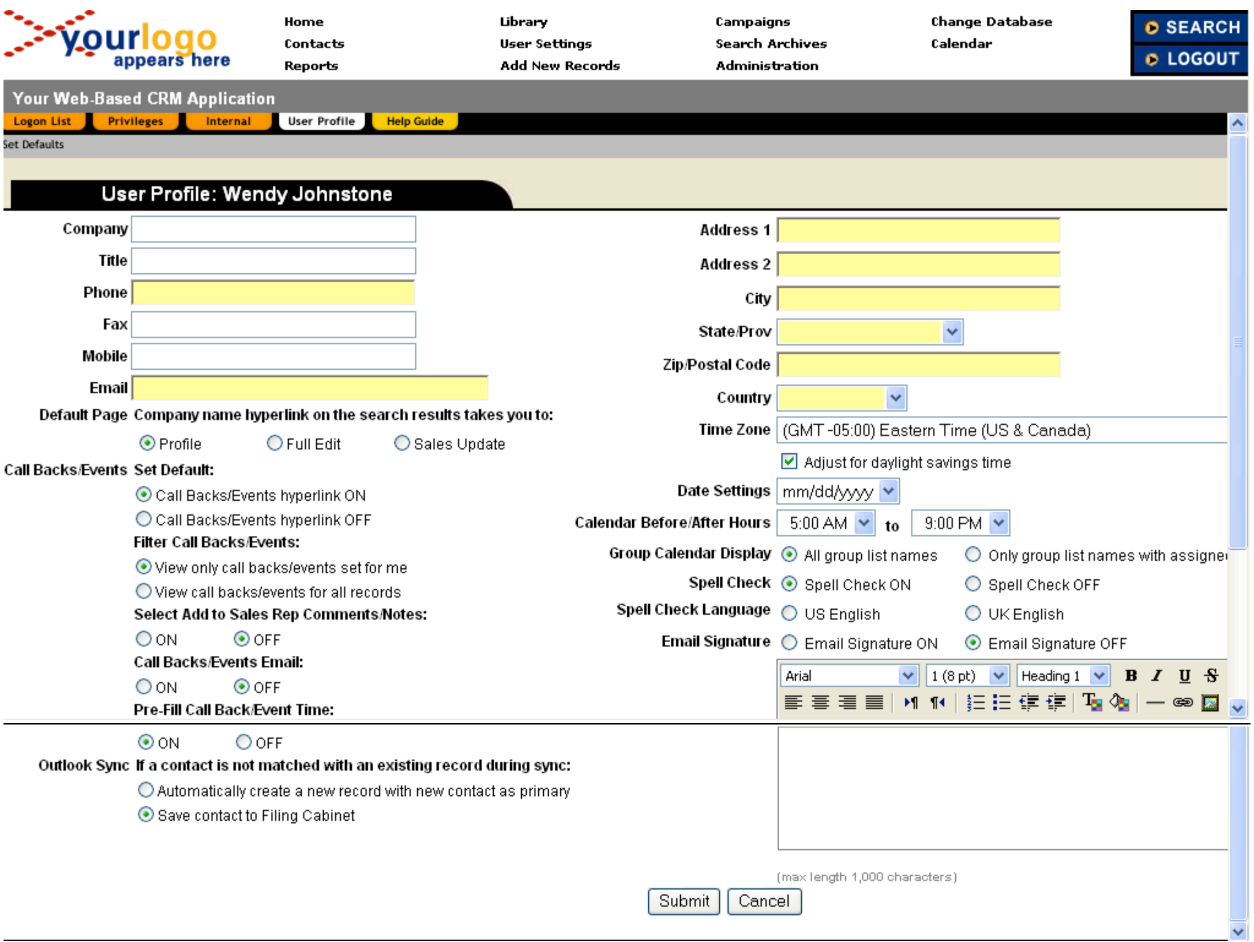
The Library Private Folders Access function allows the user to be set up to view previously set up Private Folders in that Workgroup [this is a function within the Library maintenance options].

The Reports function can be used to explicitly define what reports this logon will be allowed to see for this Workgroup.

The Email Template Print Folder Access function allows the user to be set up to view Email Templates folders that have been set up as private in this Workgroup [this is a function within the Library maintenance options].

The Group/Partner Access function allows for an Admin type logon to be restricted at the Group/Partner or Account Manager/Partner Rep level [this should only be used for User Type = Administrator level logons]. This can be used for the purpose of setting up other level of access such as one that might have access to several Groups such as a regional manager.

After setting up the Security Logon screen the user will be presented with the User Profile screen (also available for existing logons by clicking on the User Settings hyperlink on the Home Page):



<u>Key fields on this screen:</u>

- The following fields are for informational purposes only and are not used within the application:
    - Company
    - Title

  - Phone
  - Fax
  - Mobile
  - Address 1
  - Address 2
  - City
  - State/Prov
  - Zip/Postal Code
  - Country
- Email address – this is the email address that the application will use if the user has Email Notification or Express Mail activated.
- Default Page – an individual user can set what screen is used when they click on the company name in the Search Results screen.
- Call Backs/Events Set Default – this determines whether the Call Backs/Events hyperlink appears on the user's Home Page
- Filter Call Backs/Events – this determines whether the user can view all Call Backs/Events for the records they have access to or just the ones that they have created
- Select Add to Sales Rep Comments/Notes – this determines what the Call Backs/Events are appended to the Sales Rep Comments/Notes field
- Call Backs/Events Email – this determines whether the user will get a auto-email every time that they update a Call Back/Event
- Pre-Fill Call Back/Event Time – this determines whether the Call Back/Event End Time are pre-filled with the same date as the Start Time and ½ hour later
- Outlook Sync – this determines whether a record is to be automatically created when there is no match during the Outlook Sync option or whether it should be put in the File Cabinet for later manual matching by the user [Outlook Sync must be enabled in the user's logon profile for this to be activated in addition to installation of a special add-on module on the user's PC]
- Time Zone – this is used by the application to establish the correct user date/time [this is used in many functions with the application including date/timestamping as for displaying the correct date/time in the Call Back/Events function] – the Adjust for daylight savings time add an additional our during the standard daylight savings time period
- Calendar Before/After Hours – this is a special parameter that pertains to a special function within the application for certain users who measure response times for support type activities
- Group Calendar Display – this determines whether all group list names are displayed or only ones with assigned Call Backs/Events
- Spell Check – this determines whether Spell Check in turned ON/OFF
- Spell Check Language – this determines which dictionary is to be used [US or UK]
- Email Signature – this determines whether Email Signature is activated in the send email function from the Contact screen [Send Email must be turned on in the user's logon profile]