Quick Start Guide for Sales Reps

<u>Logon</u>

Click on this link <u>http://www.leadmaster.com/login/index_logon.asp</u> or enter it in your browser or go to the LeadMaster home page <u>http://www.LeadMaster.com</u> and click on the login button in the upper right of the home page. Enter your user name & password.

Note: Please be sure to go into the ***<u>User Settings</u>*** (in the top navigation bar) in the system to ensure your e-mail address is listed correctly; otherwise you will not receive automatic e-mails when you have new leads.

<u>Looking at your Leads</u>

After logging in, click on the *<u>Shortcut to all my leads</u>* link, which will appear on the top left of the information screen under the "Information Center" banner. This will take you to a list of new leads. If you haven't been assigned any leads it will be empty.

NOTE: your most recent leads will appear at the top of the list.

<u>Updating your leads via the *Sales Update Page*</u>

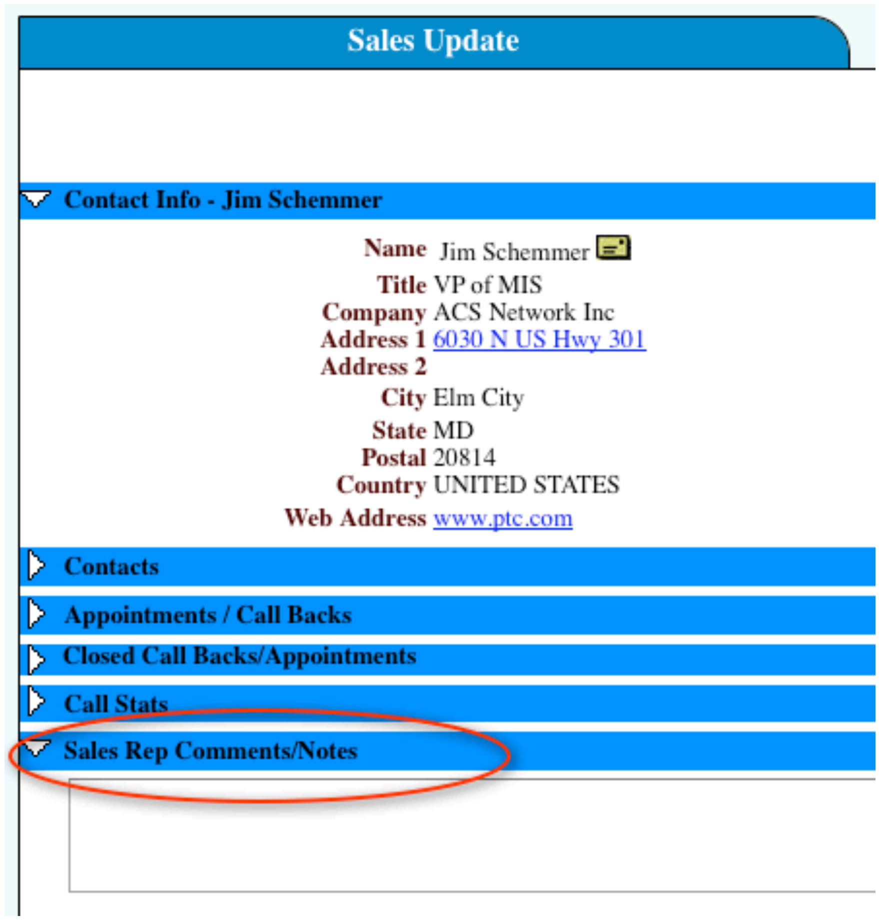
From the list of new leads, select a lead by clicking on *<u>company name</u>*.

Company	City	State	Country	Contact
ACS Network Inc	Elm City	MD	USA	Jim Schemmer
Adept Inc.	Miami	TN	USA	Buddhi Petro
Allied Access Inc	Chattanooga	TN	USA	Mike Ellison

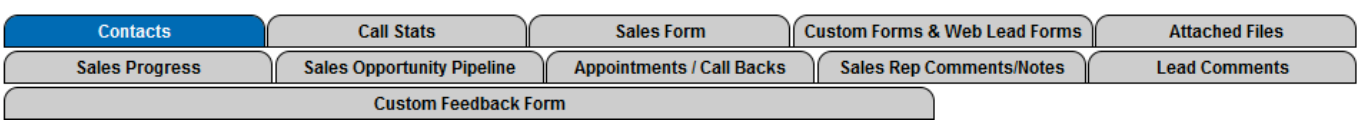
Scroll down to *<u>Sales Rep Comments/Note</u>*s - input your comments and press any of the green GO buttons located on the right of the screen.

<u>Why update LeadMaster?</u>

- It indicates the lead is being worked so it won't be re-assigned.
- Keep a history of your interaction with the account.
- Tracks all contacts in the account.
- Track appointments and send you reminders.
- Track opportunities.
- Keep track of quotes.
- You can attach files to this record.
- Can incorporate custom forms in the *<u>Sales Update Page</u>* to keep track of any type of data you can put on a custom form.



You can view the *<u>Sales Update Page</u>* in either a single long page or in a tabbed view (tabs are shown below).

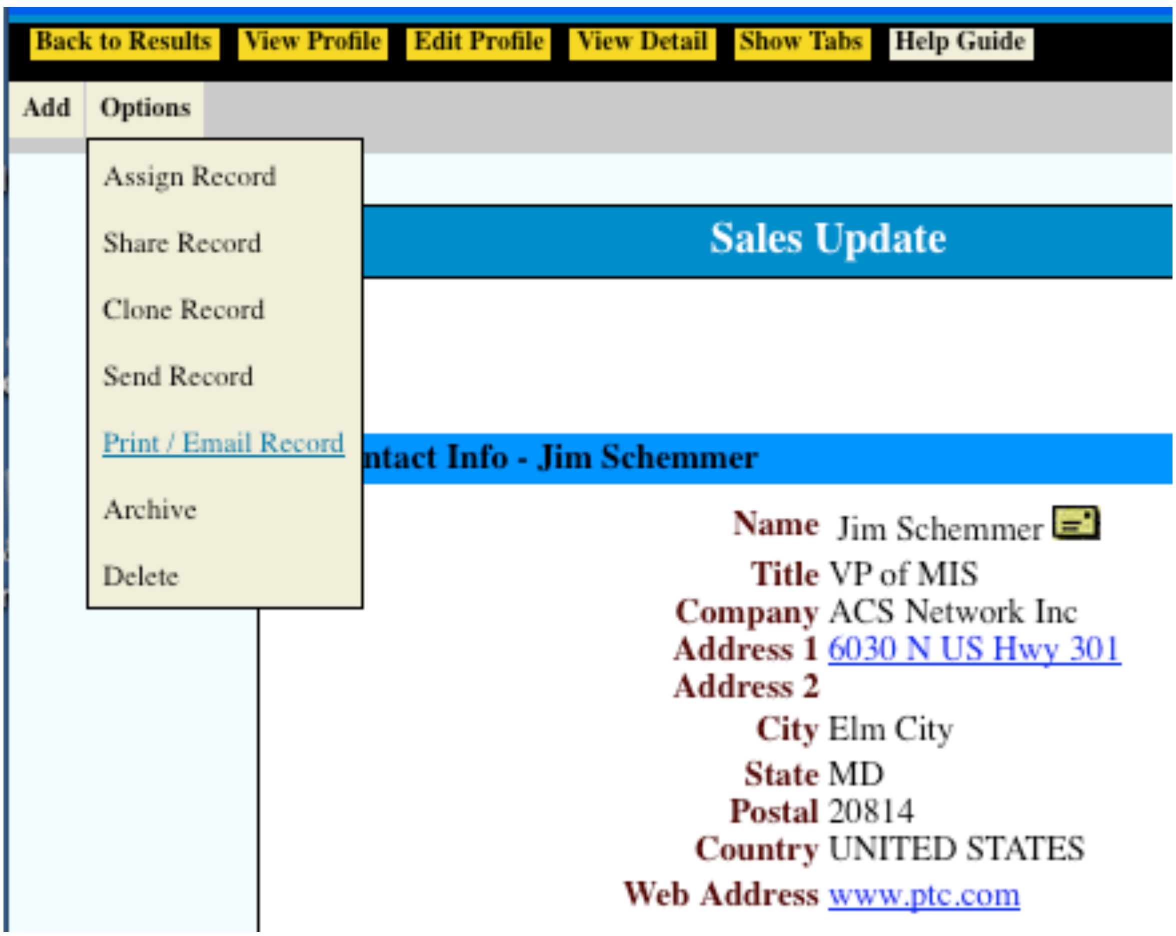


<u>How to send leads via e-mail</u>

Go to the <u>*Sales Update Page*</u> by clicking on the <u>*company name*</u> from the accounts page.

> Note: If you are not automatically taken to the <u>*Sales Update Page*</u> when selecting a lead, check your User Settings to ensure "Sales Update" is selected. Your User Settings can be found by clicking on <u>*User Settings*</u> at the top of your screen when you first enter the system. Under <u>*Default Page*</u>, select "Sales Update" and press "Submit". If you click on the <u>*contact name*</u> you'll be taken to the <u>*Edit Profile*</u> page.

Select the *Options Menu* and then select *Print/Email Record*, which is located just above the Sales Update Banner.



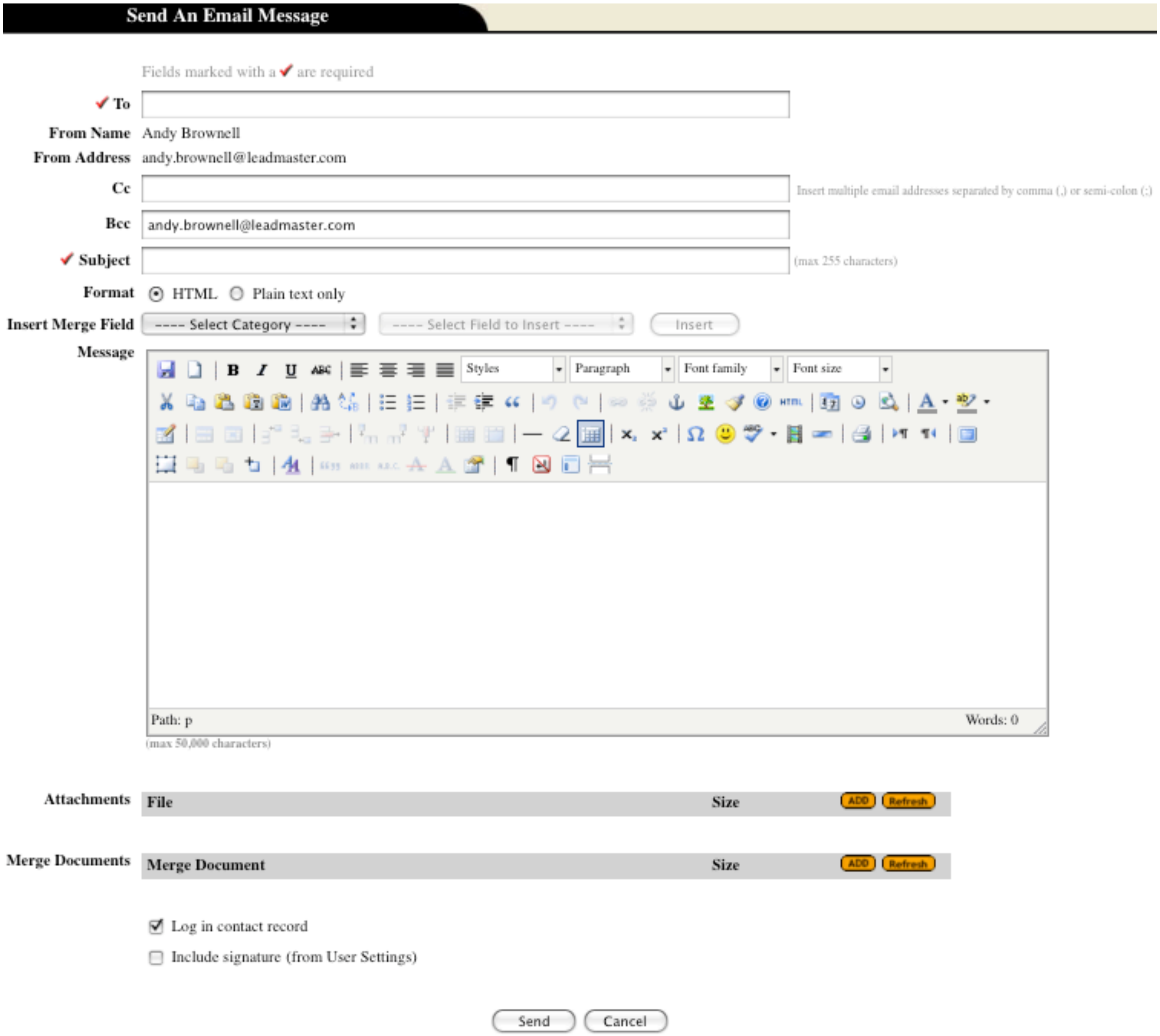
A new window will appear with tabs in the upper right that allow either <u>*Printing or Emailing*</u> this record. Click the <u>*email*</u> tab. The E-mail screen will appear. Fill out e-mail address, type in any additional comments you wish to add and press send.

<u>How to send an email from within LeadMaster</u>

There are several ways to send email:

- Click on any email address and it will open your default email client (for example, Outlook) and put the contact's email address in the To field. This is a quick and convenient way to enter the contact's email address into Outlook. LeadMaster also has an offline version that synchronizes with Outlook.
- You can send email using the LeadMaster Lead Nurturing Tracks. Basically you set up a series of emails to which you can add contacts either individually or in groups. This topic is covered in detail on the LeadMaster blog http://blog.LeadMaster.com as well as the Lead Nurturing Quick Start Guide.
- If you are authorized to send email from within LeadMaster there will be an email icon next to the contact's email address on the *Sales Update Page* (circled in red in the image below).

Clicking on the email icon will take you to the email editor where you'll be able to either compose a message or select from one of your pre-configured email templates. The LeadMaster email editor supports HTML so you'll be able to include images, links, videos and more. You'll also be able to include many of the fields from the database through a convenient merge menu.



You can use the *Email Message Templates* function from the *Administration* section to save your email as a template. This is a great way to send email invitations, newsletters, etc.

How to run reports to track your leads

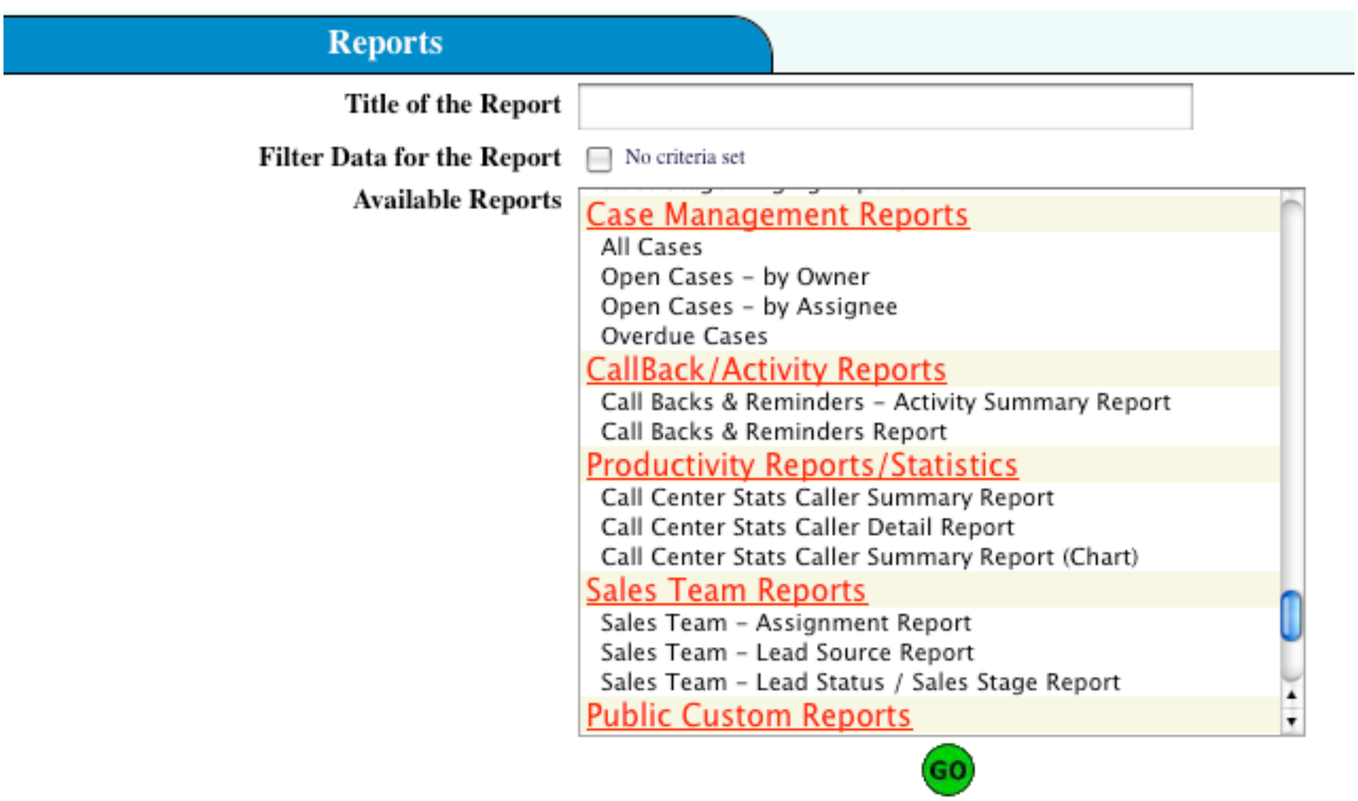
Typically you won't want to run a report on your entire database, although you can if you wish. To run a report on a specific campaign, territory, time frame, sales rep etc. select the SEARCH button located in the top far right-hand corner of most of the pages.

Select your search criteria if you wish to narrow down your report and press the green go GO button or just press go to see all of your leads.

NOTE: You may select multiple search criteria, such as CAMPAIGN, STATE and INDUSTRY but until you press the GO button GO you won't activate a search.

Once you have your results, press the Report Filter (Report Filter) button located above the search results banner.

If you wish, you can name the report by typing in the desired report name under the Title of the Report field.



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Select one of the reports. The Sales Comments is a good one to use for tracking your leads as it shows you any previous updates that have been made.

Select any sort preferences at the bottom of this screen i.e. sort by forecast date will prioritize the updates that are needed.

Press green GO button and a pre-formatted report will appear on your screen.

There are many pre-configured reports to choose from. If you don't see what you need, you may want to try the report wizard. If you still can't get the report you are looking for contact your LeadMaster representative for a quote on a custom report.

You'll find videos and tutorials in the Support Section of the LeadMaster website.

http://www.leadmaster.com/LeadMaster-Support/LeadMaster-Support-index.asp