



Quick Start Guide for Sales Reps

Logon

Click on this link http://www.leadmaster.com/login/index_logon.asp or enter it in your browser or go to the LeadMaster home page <http://www.LeadMaster.com> 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 User Settings (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.

Looking at your Leads

After logging in, click on the Shortcut to all my leads 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.



Updating your leads via the Sales Update Page

From the list of new leads, select a lead by clicking on company name.

▼ Company	City	State	Country	Contact
<input type="checkbox"/> ACS Network Inc	Elm City	MD	USA	Jim Schemmer
<input type="checkbox"/> Adept Inc.	Miami	TN	USA	Buddhi Petro
<input type="checkbox"/> Allied Access Inc	Chattanooga	TN	USA	Mike Ellison


Scroll down to [Sales Rep Comments/Notes](#) - input your comments and press any of the green  buttons located on the right of the screen.

Why update LeadMaster?

- 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 [Sales Update Page](#) to keep track of any type of data you can put on a custom form.

Sales Update

▼ Contact Info - Jim Schemmer

Name Jim Schemmer 

Title VP of MIS

Company ACS Network Inc

Address 1 [6030 N US Hwy 301](#)

Address 2

City Elm City

State MD

Postal 20814

Country UNITED STATES

Web Address www.ptc.com

▶ Contacts

▶ Appointments / Call Backs

▶ Closed Call Backs/Appointments

▶ Call Stats

▼ Sales Rep Comments/Notes

You can view the [Sales Update Page](#) in either a single long page or in a tabbed view (tabs are shown below).

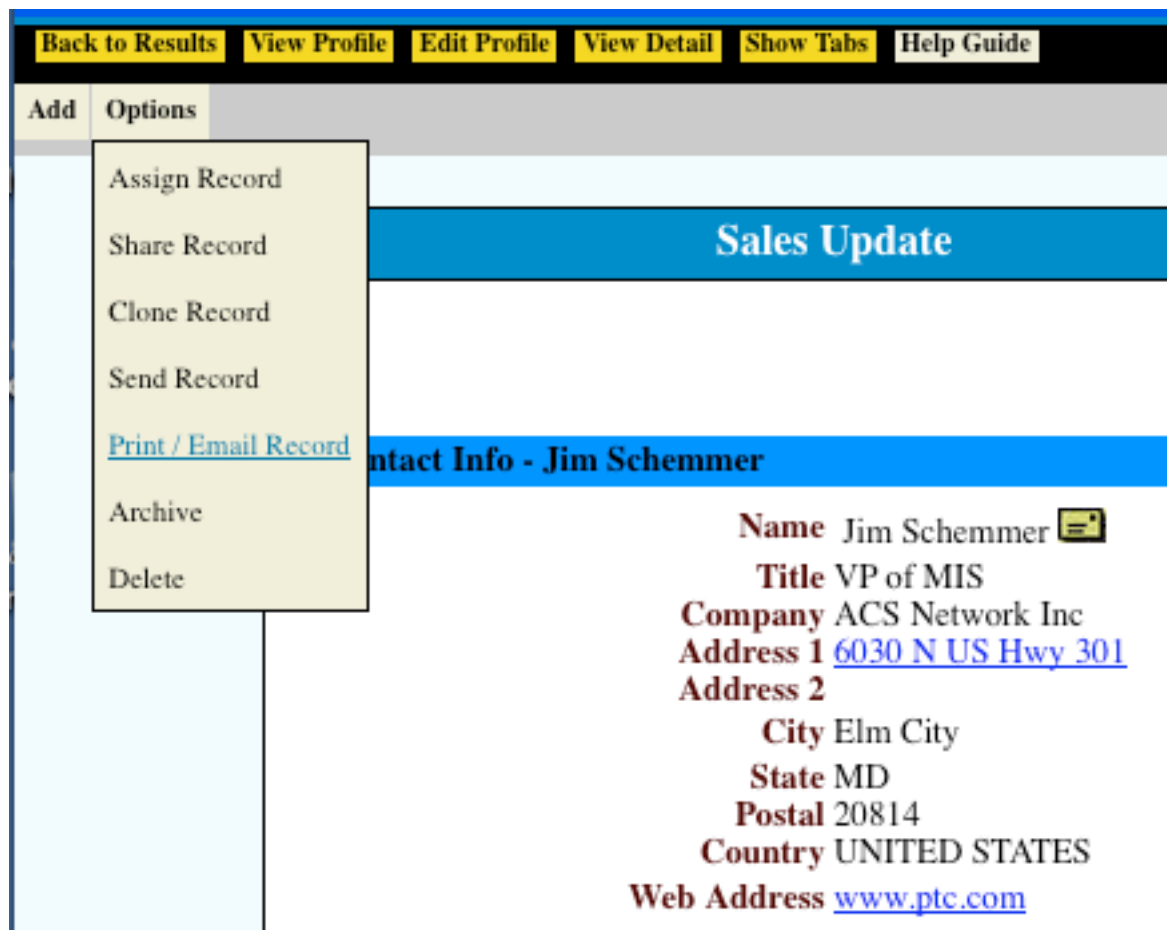
Contacts	Call Stats	Sales Form	Custom Forms & Web Lead Forms	Attached Files
Sales Progress	Sales Opportunity Pipeline	Appointments / Call Backs	Sales Rep Comments/Notes	Lead Comments
Custom Feedback Form				

How to send leads via e-mail

Go to the Sales Update Page by clicking on the company name from the accounts page.

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

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



The screenshot shows the LEADMASTER interface. At the top, there is a navigation bar with buttons: **Back to Results**, **View Profile**, **Edit Profile**, **View Detail**, **Show Tabs**, and **Help Guide**. Below this is a table with two columns: **Add** and **Options**. The **Options** column is expanded, showing a dropdown menu with the following items: **Assign Record**, **Share Record**, **Clone Record**, **Send Record**, **Print / Email Record** (highlighted in blue), **Archive**, and **Delete**. To the right of the dropdown menu, there is a blue banner that says **Sales Update**. Below the banner, there is a section titled **Contact Info - Jim Schemmer**. This section contains the following information: **Name** Jim Schemmer (with a small icon), **Title** VP of MIS, **Company** ACS Network Inc, **Address 1** [6030 N US Hwy 301](#), **Address 2** (empty), **City** Elm City, **State** MD, **Postal** 20814, **Country** UNITED STATES, and **Web Address** [www.ptc.com](#).

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

How to send an email from within LeadMaster

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).



Sales Update Record Status : Active

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Contact Info - Doug Wayne

Name Mr Doug Wayne  Title Information Services Manager Company Axnet Data Systems Address 1 1426 Main St Address 2 City Columbia State NC Postal 27420 Country UNITED STATES Web Address www.jdedwards.com	Organization Gulf GO Account Manager Don Hall Partner Global Technologies Partner Rep Sally Jones Campaign A1A Sample Campaign Phone 1 910-460-6101 Alt Phone Cell/Mobile Fax 910-533-5096
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Contacts Add

Contact	Title	Phone 1	Email
Doug Wayne	Information Services Manager	910-460-6101	DWayne@ipaper.com 

Appointments / Call Backs Add

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.

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** 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.

Reports

Title of the Report

Filter Data for the Report ☐ No criteria set

Available Reports

Case Management Reports
All Cases
Open Cases – by Owner
Open Cases – by Assignee
Overdue Cases

CallBack/Activity Reports
Call Backs & Reminders – Activity Summary Report
Call Backs & Reminders Report

Productivity Reports/Statistics
Call Center Stats Caller Summary Report
Call Center Stats Caller Detail Report
Call Center Stats Caller Summary Report (Chart)

Sales Team Reports
Sales Team – Assignment Report
Sales Team – Lead Source Report
Sales Team – Lead Status / Sales Stage Report

Public Custom Reports

GO



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>