Logins and Hierarchy

How to set up logins and hierarchy in your LeadMaster CRM.



What is the difference?

- Logins provide a user the ability to login to the CRM.
- Hierarchy the list of people who are assigned records/leads (a sales or customer service rep).
- You can have a login but not be in hierarchy.
- You can be in hierarchy but not have a login.
- Access to hierarchy & login management is an admin privilege.

Logins and Login management

- Logins provide a user the ability to login to the CRM.
- Login management is in the Main Admin Menu

Home Accounts Contacts Reports	Library Add Records & Leads Campaigns	Calendar Admin SEARCH
Administration Help Gulde		
User / Workgroup Vogin Management / User Security Add User Create New User Login View/Edit Existing User Logins Add New Security Level View/Edit Security Level Manage Required Fields	Campaign / Messaging / Reports Home Page / Dashboards / Shortcuts Campaign Management Marketing / Email / Lead Nurturing Campaigns Lead-Xpress / Email Notifications	Automation / Customization Customize Screens & Fields / Record Mgmt Marketing Automation / Workflow Mgmt Custom Forms / Web Forms / Quotes Advanced Customization / Options Advanced Administration System Reports
Company Hierarchy / Assignments Manage Workgroups Automated Record Assignments Track User Activity Track System Activity		 → System Logs → System Management

From the Login Management area you can:

- Add User
- Create New User Login
- View/Edit Existing User Logins
- Add New Security level
- View/Edit Security Levels
- Manage required Fields

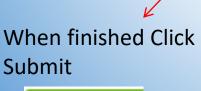
Adding A User – adds to both login management & hierarchy

Adding a user is easily done with the Add User in Login Management

Add a User

Logon List

A * indicates a required field
AB - Janice
[Available Levels] 🔶 🥝
○ Yes ● No



CANCEL

SUBMIT



Add User
Create New User Login 🔞
View/Edit Existing User Logins
Add New Security Level 🔞
View/Edit Security Level 🔞
Manage Required Fields 🔞

Six fields are required First Name Last Name Email Username New Password Verify New password

We recommend using the users email address for Username to avoid any conflicts. Security Profiles can be selected and will be covered in detail.

Create New User Login

Add Logon					
Logon List Page Options Help Guide					
		SUBMIT			
Viser Information	> Workgroup Access				
★ First Name	> Searching	> Administration			
★ Last Name ↓ Username	Reporting	Integration Options			
★ New Password	Email Settings	Offline/Mobile Access Privileges			
Verify New Password	Library	Calendar and Callback / Events			
Group ★ User Type Please Choose € @	Adding/Editing – Field Edits				
Default Label Set Standard User Status Active Set Security [Available Levels] Home Page Adding Records Viewing / Editing Records Top Banner and Side Menu Items to Display	Required Fields First Name Last Name Email Username New Password Verify New password User Type	SUBMIT Cancel			

Creating a Login with this selection allows you to customize the users login

- There is still the ability to use security profile which sets all privileges
- Can make additions/deletions as required
- Will need to manually set up hierarchy

Creating Security Templates

Creating security levels takes a bit of time initially but will save you time as you add users or want to change any access

Add Security Level
Security Levels Select Options Clear Options
Security Level
★ Level Name
User Type Please Choose 🗸
Default Label Set Standard 🗸
Home Page
🗆 Add / Edit / Delete Message Boards 🞯
🗆 Add / Edit / Delete / View Dashboard Charts 🞯
Adding Records
Add New Records
Enforce User Security with Check For Match
Clone Contact to New Record
🗆 Add Call Back 🞯
🗆 Import Records 🞯
Import Records - Import to a Custom Form
Import Records - Match to Existing Contacts @
Imported Records - View All Imported Records
Import records - Deduplication
Viewing / Editing Records
Access to "Sales Update Page" page 🞯
Access to "Edit Profile" page 🙆
Access to "Review And Take Action" page

You can have multiple security templates.

You can customize the security levels to fit the categories of your users

Company Hierarchy and Assignments

- Hierarchy is how you can assign an individual to a record
- The Company Hierarchy / Assignments area is accessed via the Main Admin Menu

User / Workgroup	Campaign / Messaging / Reports	From the Company Hiera
▹ Login Management / User Security	Home Page / Dashboards / Shortcuts	/Assignments area you ca
 Company Hierarchy / Assignments 	➤ Campaign Management	Add Group
Add Group @	Marketing / Email / Lead Nurturing Campaigns	View/Edit Group
View/Edit Group 🐵 Add Acct Mgr 🐵	Lead-Xpress / Email Notifications	
View/Edit Acct Mgr 🔘	Workgroup System Reports	Add Acct Mg
Add Partner 🐵		Add MFGPartner
View/Edit Partner 🞯 Add Partner Rep 🞯		Add Partner Rep ID
Add Partner Rep 🖤 View/Edit Partner Rep 🞯		Quota set up
Quota Setup		
 Manage Workgroups 		
Automated Record Assignments		
Track User Activity	* Your labels may be slightly di	ifferent but the
→ Track System Activity		