Logins and Hierarchy

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

CRM Solutions
by LeadMaster

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

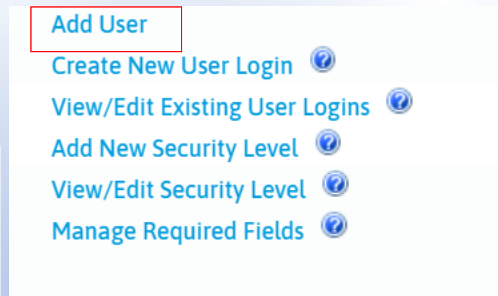
- Logins provide a user the ability to login to the CRM.
- Login management is in the Main Admin Menu

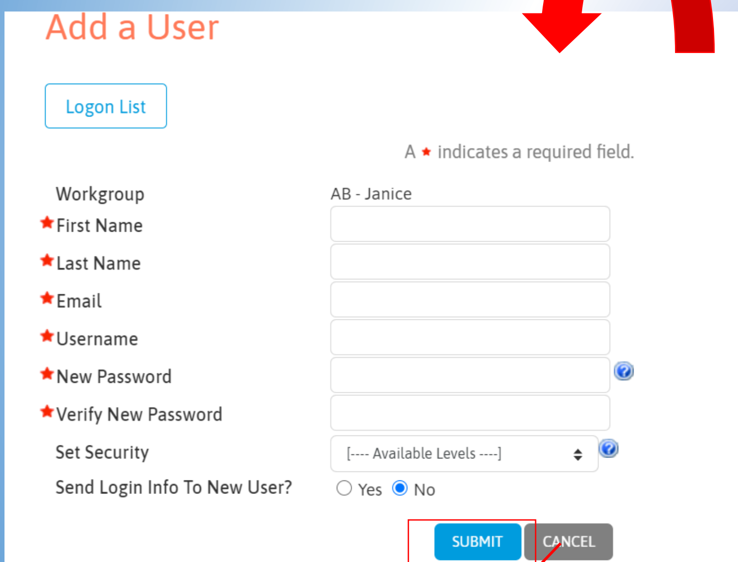
From the Login Management area you can:

- 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.

Workgroup	AB - Janice
★First Name	
★Last Name	
★Email	
★Username	
★New Password	
★Verify New Password	
Set Security	[---- Available Levels ----]
Send Login Info To New User?	Yes No

SUBMIT CANCEL

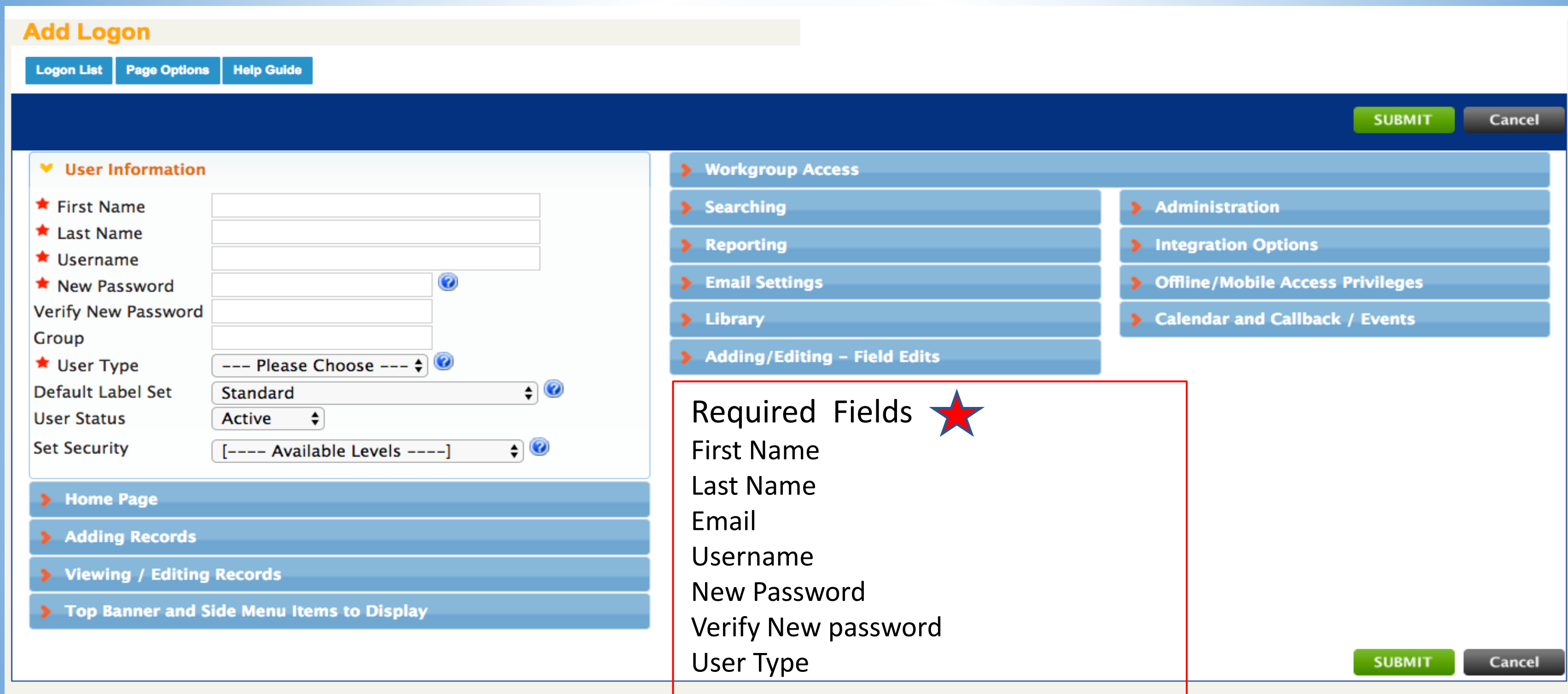
Six fields are required

First Name
Last Name
Email
Username
New Password
Verify New password

When finished Click Submit

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



Required Fields

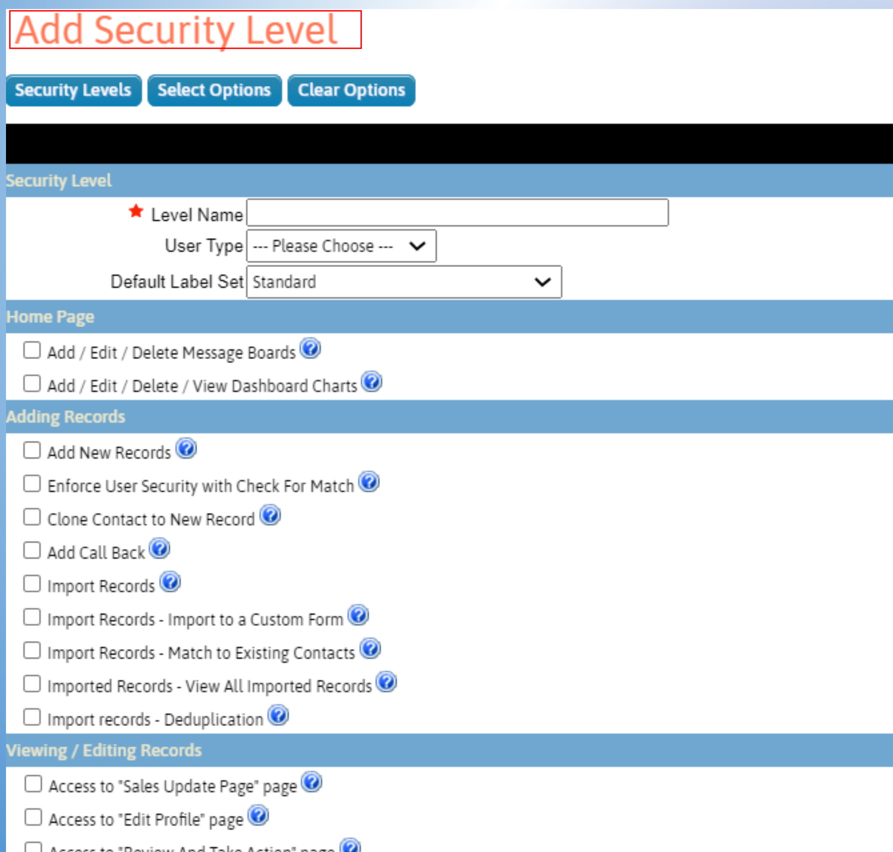
First Name
Last Name
Email
Username
New Password
Verify New password
User Type

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

[redacted]

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

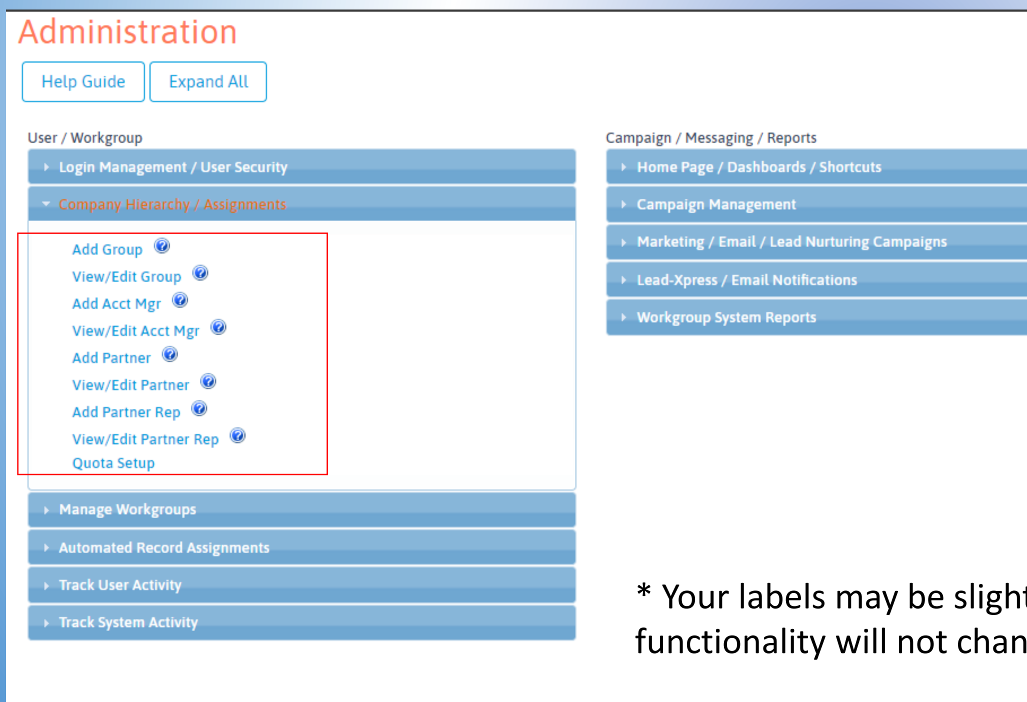
- [ ] Access to "Sales Update Page" page
- [ ] Access to "Edit Profile" page
- [ ] Access to "Review And Take Action" page

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



From the Company Hierarchy /Assignments area you can:

- Add Group
- View/Edit Group
- Add Acct Mgr
- Add MFGPartner
- Add Partner Rep ID
- Quota set up

* Your labels may be slightly different but the functionality will not change