

# 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



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

**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

When finished Click Submit

**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

**Add Logon**

Logon List | Page Options | Help Guide

SUBMIT Cancel

**User Information**

★ First Name

★ Last Name

★ Username

★ New Password  ⓘ

Verify New Password

Group

★ User Type  ⓘ

Default Label Set  ⓘ

User Status

Set Security  ⓘ

Home Page

Adding Records

Viewing / Editing Records

Top Banner and Side Menu Items to Display

Workgroup Access

Searching

Reporting

Email Settings

Library

Adding/Editing - Field Edits

Administration

Integration Options

Offline/Mobile Access Privileges

Calendar and Callback / Events

**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

**Administration**

Help Guide Expand All

User / Workgroup

- ▶ Login Management / User Security
- ▶ **Company Hierarchy / Assignments**
  - Add Group
  - View/Edit Group
  - Add Acct Mgr
  - View/Edit Acct Mgr
  - Add Partner
  - View/Edit Partner
  - Add Partner Rep
  - View/Edit Partner Rep
  - Quota Setup
- ▶ Manage Workgroups
- ▶ Automated Record Assignments
- ▶ Track User Activity
- ▶ Track System Activity

Campaign / Messaging / Reports

- ▶ Home Page / Dashboards / Shortcuts
- ▶ Campaign Management
- ▶ Marketing / Email / Lead Nurturing Campaigns
- ▶ Lead-Xpress / Email Notifications
- ▶ Workgroup System Reports

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