



# CRM Solutions by LeadMaster



# Lead-Xpress Administration Guide

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## OVERVIEW

Lead-Xpress allows the user to update LeadMaster from either an email or a link. The link is active as long as the user is listed in either the account manager or partner rep tables.

## ENABLING LEAD-XPRESS

1. Access Administration > Manage Workgroups
2. Then select Edit for the appropriate workgroup.
3. Next, select Enabled from the dropdown for Allow Updates to Records Via Email

Email & Lead Nurturing	
HTML Email	Enabled
Record Email Logging	Enabled
Email Multiple Records	Enabled
Email	Enabled
Lead Nurturing	Enabled <input type="text" value="Number of contacts limit 1000"/>
Use Email Campaign "From Address" As From Address When Sending Email Messages	Enabled
Send Email Messages	From LeadMaster on behalf of Sender
Number of email messages allowed:	
Per Month	10000
Per Day	1000
Per Search	200
Allow Updates To Records Via Email	Enabled
Require Lead-Xpress Password	Enabled
Lead Nurturing Execution Time	7:00 AM
Email Deals to Reps	Enabled
Show Address Book	Enabled
Attach Details When Emailing Record	Enabled
Enforce GDPR	Disabled
Opt-Out Domains	Select

4. From the workgroup perspective, that's all there is to it. Now you need to set up the sales reps and / or partner reps.

If your sales reps and / or partner reps already have logon access to LeadMaster and an email address, then there is nothing more you need to do. You are ready to request updates to accounts / records / leads in LeadMaster.

If your sales reps and / or partner reps will not have logon access to LeadMaster, you need to create new Lead-Xpress users for your sales reps and partner reps.

## CREATING NEW LEAD-XPRESS USERS

You can either set up Lead-Xpress users individually, or you can import them in a group.

### ADDING NEW LEAD-XPRESS USERS INDIVIDUALLY

1. Go to Administration > Sales Reps or Partner Reps (Both can be configured as LeadXpress users)
2. Add Sales Rep
3. Fill out your sales rep's info and click Submit

#### Points to remember:

The screenshot shows the 'Support Information' form in LeadMaster CRM. The form includes the following fields and options:

- Group:** Support (dropdown)
- First Name:** Lead
- Last Name:** Xpress.
- Title:** (empty)
- Has Logon:** No (radio button selected, callout 1)
- Can View / Update Assigned Records:** Yes (radio button selected, callout 2)
- Date Format:** mm/dd/yyyy (dropdown, with note 'Applies when updating records')
- Require Password:** (checkbox, callout 6)
- Phone:** (empty)
- Fax:** (empty)
- Mobile:** 9293565063 (text input, callout 4)
- Mobile Provider:** AT&T (dropdown, callout 4)
- Email:** joleadmaster5@gmail.com (text input, callout 3)
- Send Email to Support:** No (radio button selected)
- Available for Assignment:** Yes (radio button selected, callout 5)
- Lead Assignment Notification Email:** No (radio button selected, callout 5)

1. **Has Logon** should show **No**. Lead-Xpress users don't have logon access to LeadMaster. If Has Logon shows Yes, the next section, **Can View / Update Assigned Records**, will not appear. (Users with traditional logons can always view/update assigned records.)
2. Provided that Has Logon shows No, make sure that **Can View / Update Assigned Records is set to Yes**.
3. Be sure to enter your sales rep's **email address**. Sales reps will receive notifications of record assignments and requests to update records via email.
4. Providing your sales rep's **mobile number and mobile provider** will allow the system to send the sales rep a text message through workflow automation.
5. **Express Email does not need to be set to Yes**, but if it is not, the sales rep won't receive email notification of record assignments. For example, suppose the sales rep is part of a round robin lead distribution. **They won't receive email notification of new records assigned to them unless Express Email is set to Yes**. They will receive **requests to update records via email** provided the option **Can View / Update Assigned Records is set to Yes**.
6. **Require Password** - depending on your preference, you can enable and require passwords for your Lead-Xpress users.

## IMPORTING A GROUP OF SALES REPS.

1. Prepare your import file. The import file must be a .csv file and have no header row and 5 columns. The columns must be in the following order:

Group  
First Name  
Last Name  
Email  
Phone

2. Next, go to **Administration** > under **Company Hierarchy / Assignments section** click on **View/Edit Sales Rep.**
3. Click on **Import**

ID	Group	Support	Email
<input type="checkbox"/> 1509	Support	Jp Hernandez	jo@leadmaster.com
<input type="checkbox"/> 1511	Support	Joanna Hernandez	joanna.hernandez@leadmaster.com

4. Choose your import file

## Support Import Wizard

[Help Guide](#)

**Import file**  No file selected.  
Click [ Browse... ] to find your file.

The import file must be a .csv file and have no header row and 5 columns. The columns must be in the following order:

1. Group
2. First Name
3. Last Name
4. Email
5. Phone

Click [ Next >> ] to continue.

Cancel

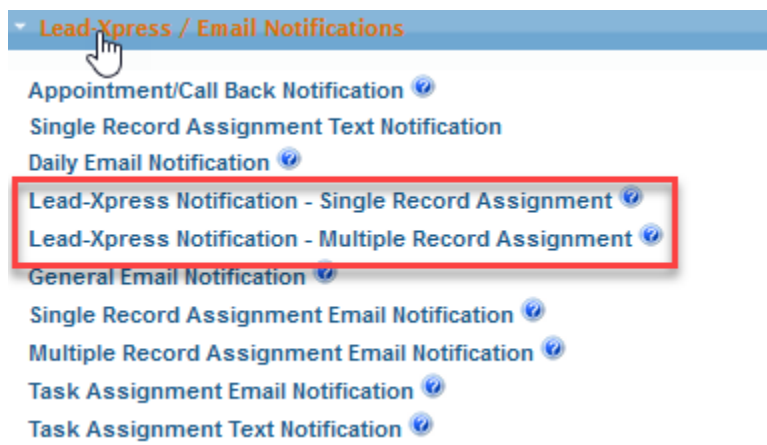
Next >>

- Once the .csv file is loaded, select Edit for each sales rep and select **Yes to Can View/Update Assigned Records** to enable each sales rep to receive requests to update records.

## CUSTOMIZING EMAIL REQUESTS TO UPDATE RECORDS

Create a custom email notification template that will be sent out whenever a 'request update to records' action is triggered.

- Go to **Administration**
- Under **Lead-Xpress and Email Notification** section, click on **Lead-Xpress Notification – Single Record Assignment** or **Lead-Xpress Notification – Multiple Record Assignment**.



- Customize the subject of the email; you can use the first Insert Merge Field to include information from the record in the subject.

Workgroup

Type

**Request Updates to a Record Email Notification Content**

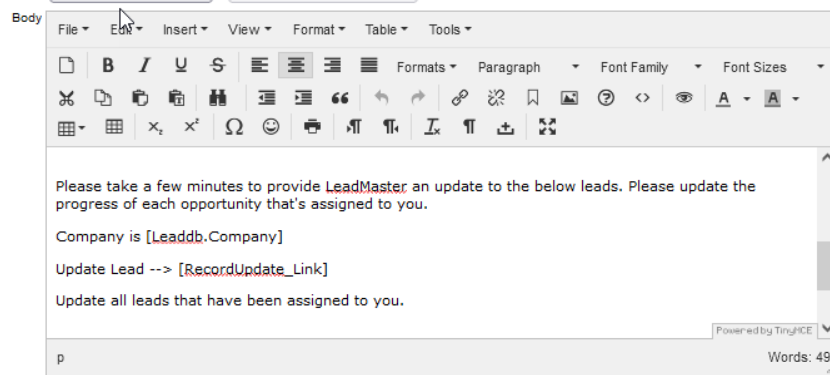
From Name

From Address  Please enter a valid email address, e.g. sales@companyabc.com

Insert Merge Field

Subject

4. Customize the body of the email; you can utilize the second Insert Merge Field to include information from the record in the body of the email.



5. Scroll down to Additional Options > Options for Updating the Record: **To provide a link to the form**
6. **Checkboxes:** Select appropriate sections and fields to appear in the form your sales reps will see when they update the record.

Options for Updating the Record  Via a link to the record

Request Updates to the Following Fields

- Primary Contact Information
- Sales Rep Comments/Notes
  - Sales Rep Comments/Notes
- Review
- Profile Summary
 

<input checked="" type="checkbox"/> Lead Status	<input checked="" type="checkbox"/> Lead Value
<input checked="" type="checkbox"/> Lead Sales Stage	<input type="checkbox"/> Forecast Date
<input checked="" type="checkbox"/> Close Date	<input checked="" type="checkbox"/> Probability
<input checked="" type="checkbox"/> Date	<input type="checkbox"/> Initial Lead Grade
<input checked="" type="checkbox"/> Lead Source	<input checked="" type="checkbox"/> Marketing Mix
<input type="checkbox"/> Export Status	<input type="checkbox"/> Export Date
<input checked="" type="checkbox"/> Campaign	
- Contacts
  - Contacts
- Call Back/Event
- Call Stats
 

<input checked="" type="checkbox"/> New Lead	<input checked="" type="checkbox"/> Called - Have not Reached	<input checked="" type="checkbox"/> Appointment Scheduled
<input checked="" type="checkbox"/> Qualified	<input checked="" type="checkbox"/> Not-Qualified	<input checked="" type="checkbox"/> Long-term Nurture
<input checked="" type="checkbox"/> Send SMS	<input checked="" type="checkbox"/> Application Accepted	<input checked="" type="checkbox"/> Application Completed
<input checked="" type="checkbox"/> Orientation Completed	<input checked="" type="checkbox"/> Enrolled Student	<input checked="" type="checkbox"/> Attach Form
- Shortcuts
 

<input checked="" type="checkbox"/> Add Note	<input checked="" type="checkbox"/> Add Event	<input checked="" type="checkbox"/> Add Marketing Activity
<input checked="" type="checkbox"/> Add Deal	<input checked="" type="checkbox"/> Add Quote	<input checked="" type="checkbox"/> Add Case
<input checked="" type="checkbox"/> Attach Form	<input checked="" type="checkbox"/> Send Email	<input checked="" type="checkbox"/> Open Existing Form
<input checked="" type="checkbox"/> Assign Record	<input checked="" type="checkbox"/> Calendar	<input checked="" type="checkbox"/> Attach Form - Upload Files
<input checked="" type="checkbox"/> Add to Lead Nurturing Track	<input checked="" type="checkbox"/> Add Contact	<input checked="" type="checkbox"/> Open URL
<input checked="" type="checkbox"/> FB Company	<input type="checkbox"/> Add Tag	<input type="checkbox"/> Add Record
- One Click Actions 3
  - Stat37
- Case
  - Case
- Attached Files
  - Attached Files
- Supplemental Information
  - Supplemental Information
- Sales Form
  - Sales Form
- Sales Opportunity
  - Sales Opportunity
- Custom Forms & Web Capture
  - Custom Forms & Web Capture
- Background Information
  - Background Information

Please note, depending upon how you have your checkboxes configured in the Click Actions section, not all checkboxes will function as configured. For example, suppose you want to schedule an appointment or callback using one of the checkboxes.

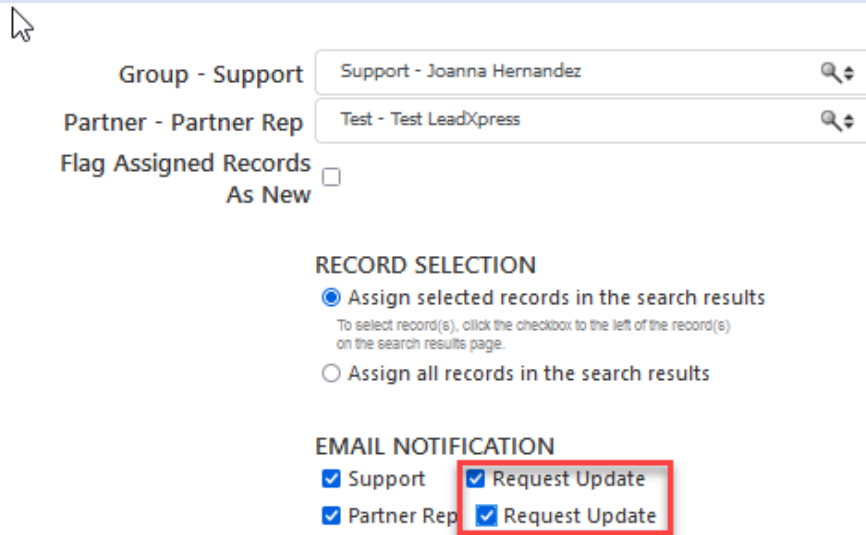


This is a common LeadMaster function making it quick and easy to schedule a call back for tomorrow or the next day etc. However, Lead-Xpress users don't have logon access to LeadMaster and therefore don't have a LeadMaster calendar. So that checkbox won't work for Lead-Xpress users.

## ASSIGNING RECORDS WITH EMAIL NOTIFICATION & REQUEST FOR UPDATE

There are two ways to request an update to records; either through a **Request to Update Records** or when **Assigning Records**.

### WHEN ASSIGNING RECORDS FROM THE ACCOUNTS LIST OR RECORD SEARCH RESULT PAGE



Group - Support

Partner - Partner Rep

Flag Assigned Records   
As New

**RECORD SELECTION**

Assign selected records in the search results  
To select record(s), click the checkbox to the left of the record(s) on the search results page.

Assign all records in the search results

**EMAIL NOTIFICATION**

Support  Request Update

Partner Rep  Request Update

1. Go to the **Accounts list** page or Do a **Record search**
2. Select your desired records (via the Accounts list or from the Search Results page)
3. Click the **Record Options** button and select **Assign**
4. Configure the hierarchy assignment
5. Under **Email Notification** > Tick the **Request Update** checkbox
6. Submit

## REQUESTING UPDATES TO RECORDS VIA LEAD-XPRESS

The screenshot shows the 'Accounts' list page in LeadMaster CRM. The page includes a search bar, a sidebar with navigation options, and a main table of records. The table has columns for Company, Contact, Email, Phone, Lead Status, Campaign, Support, More Info, Entered, Last Updated, Interest, and Contacts. The 'Record Options' button is visible above the table, and several records are selected with checkboxes.

Company	Contact	Email	Phone	Lead Status	Campaign	Support	More Info	Entered	Last Updated	Interest	Contacts
<input checked="" type="checkbox"/>	Test Landing Page2	test1@test1.	9293565063		Jo	None		11/10/2022	11/10/2022		
<input checked="" type="checkbox"/>	Page Test	Test Landing Pa	test1@test1.	9293565063	Jo	None		11/10/2022	11/10/2022		
<input checked="" type="checkbox"/>	Page Test	Test Landing Pa	test1@test1.	9293565063	Jo	None		11/10/2022	11/10/2022		
<input checked="" type="checkbox"/>	Page Test	Test Landing Pa	test1@test1.	9293565063	Jo	None		11/10/2022	11/10/2022		
<input type="checkbox"/>	9293565063 Landing test	https://solu	9293565063		Jo	None		11/10/2022	11/10/2022		
<input type="checkbox"/>	Page Test	Test Landing Pa	test1@test1.	9293565063	Jo	None		11/10/2022	11/10/2022		
<input type="checkbox"/>	(Select)	(Select)	test@test.co	9293565063		None	None	11/10/2022	11/10/2022		
<input type="checkbox"/>	Test	Test Landing Pa	test1@test1.	9293565063	Jo	None		11/10/2022	11/10/2022		

1. Go to the Accounts list page or Do a Record search
2. Select your desired records (via the Accounts list or from the Search Results page)
3. Click the **Record Options** button and select **Request Update**
4. Request an update from the sales rep, the partner rep or both
5. Request an update for all the records or just the ones you've selected with a checkmark
6. Note the request in the Sales Comment area of each record.
7. Submit