CRM Solutions
by LeadMaster

Lead-Xpress Administration Guide

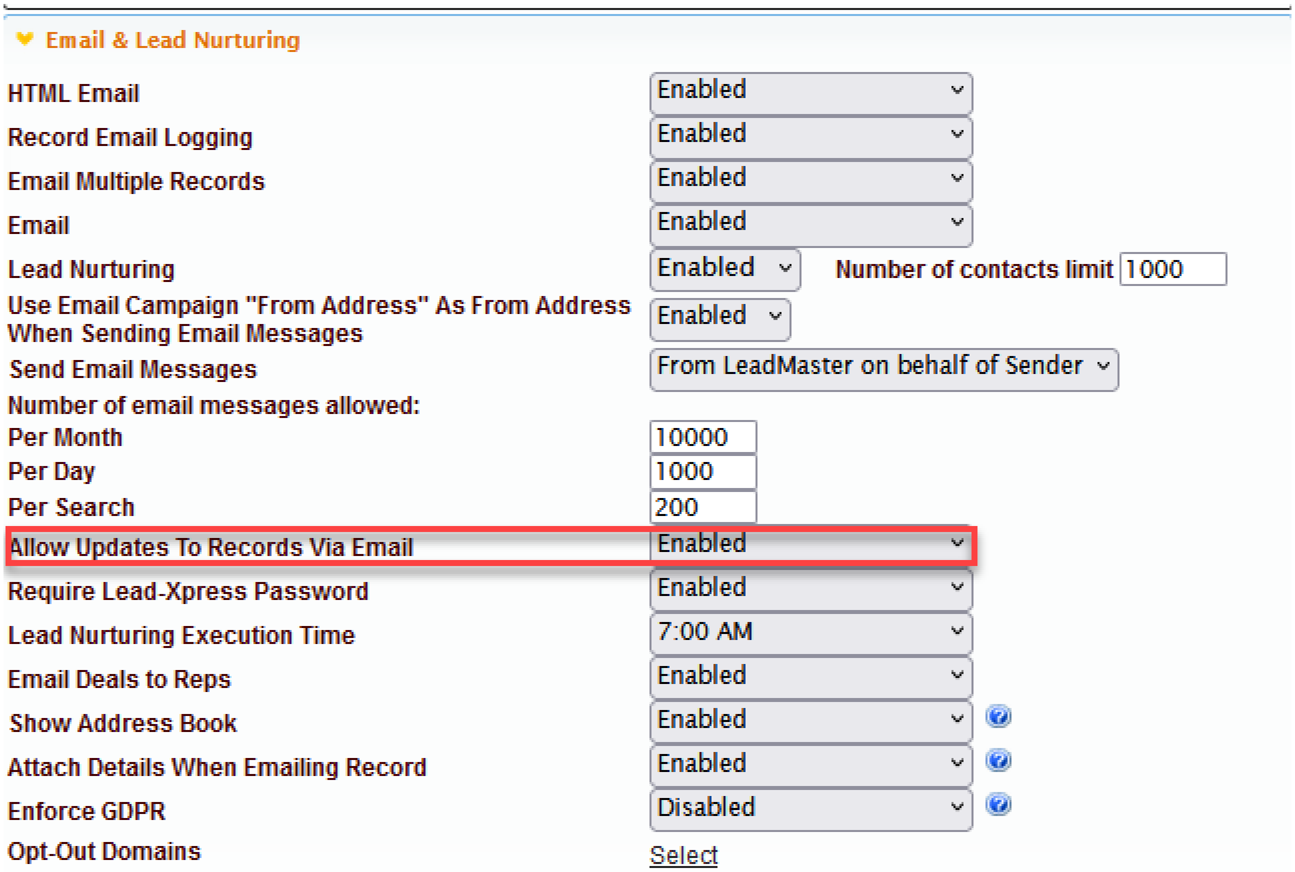
CONTENTS

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



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.

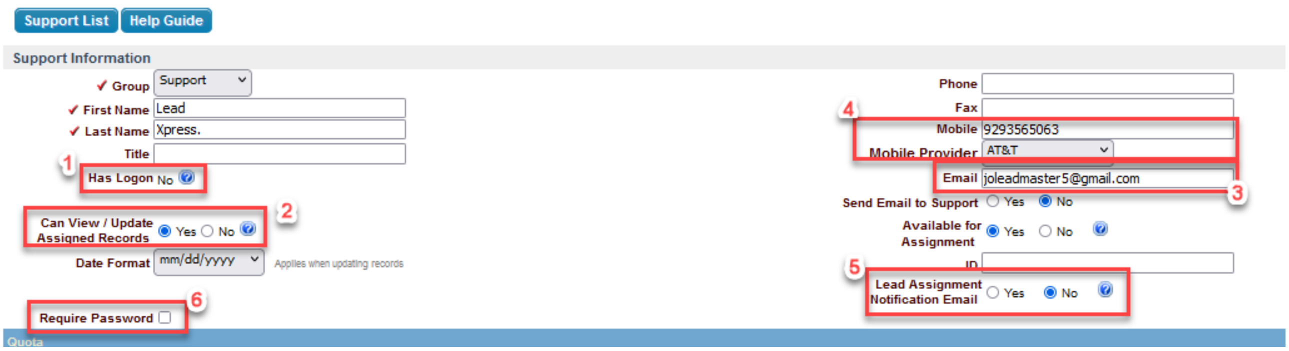
CREATING NEW LEAD-XPRESS USERS

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:



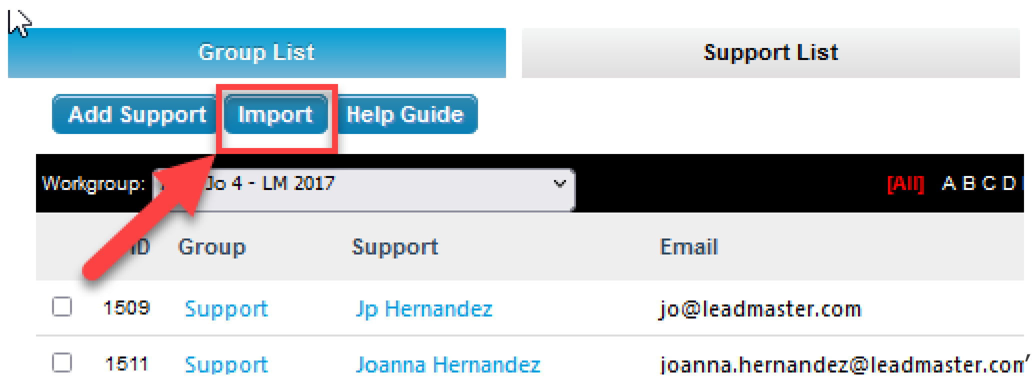
1. **Has Logon** should show **No**. Lead-Xpress users don't have logon access to LeadMaster. If Has Logon shows Yes, the next section, **Can View / Update Assigned Records**, will not appear. (Users with traditional logons can always view/update assigned records.)
2. Provided that Has Logon shows No, 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.

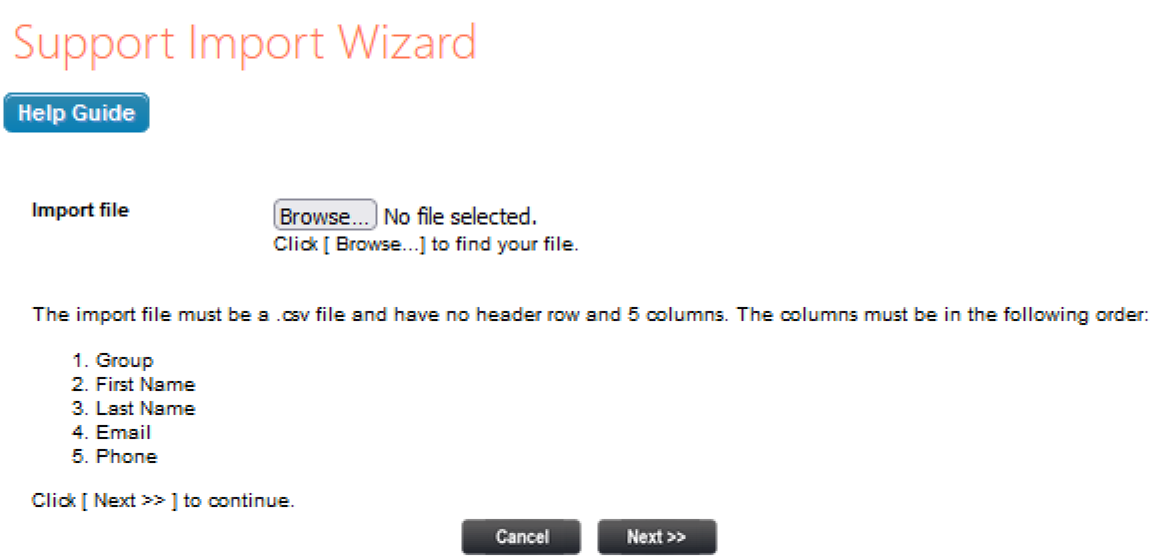
1. Prepare your import file. The import file must be a .csv file and have no header row and 5 columns. The columns must be in the following order:

   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**



4. Choose your import file

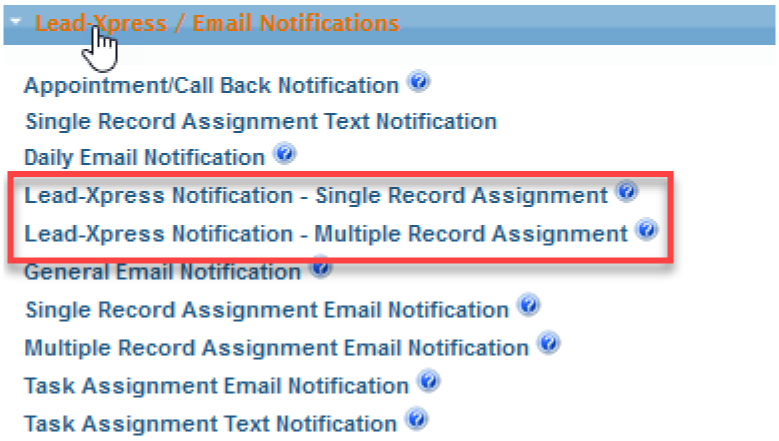


5. Once the .csv file is loaded, select Edit for each sales rep and select **Yes** to **Can View/Update Assigned Records** to enable each sales rep to receive requests to update records.

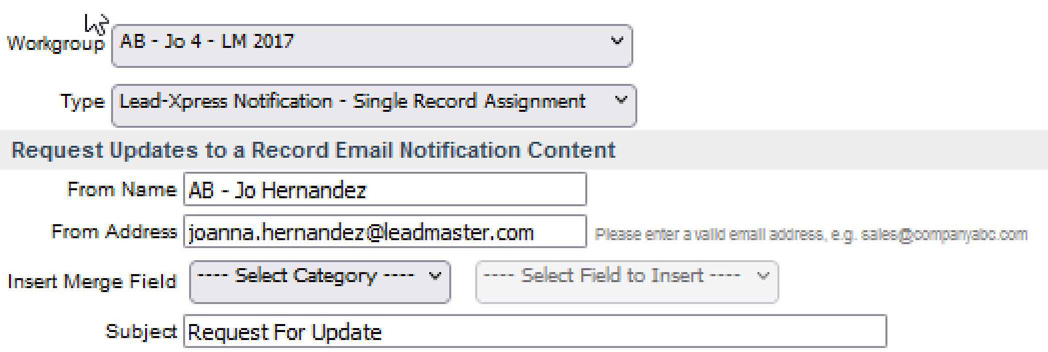
CUSTOMIZING EMAIL REQUESTS TO UPDATE RECORDS

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

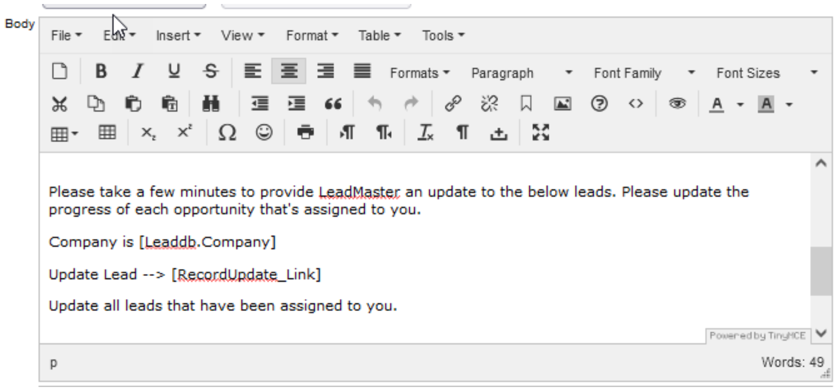
1. Go to **Administration**
2. Under **Lead-Xpress and Email Notification** section, click on **Lead-Xpress Notification – Single Record Assignment** or **Lead-Xpress Notification – Multiple Record Assignment**.



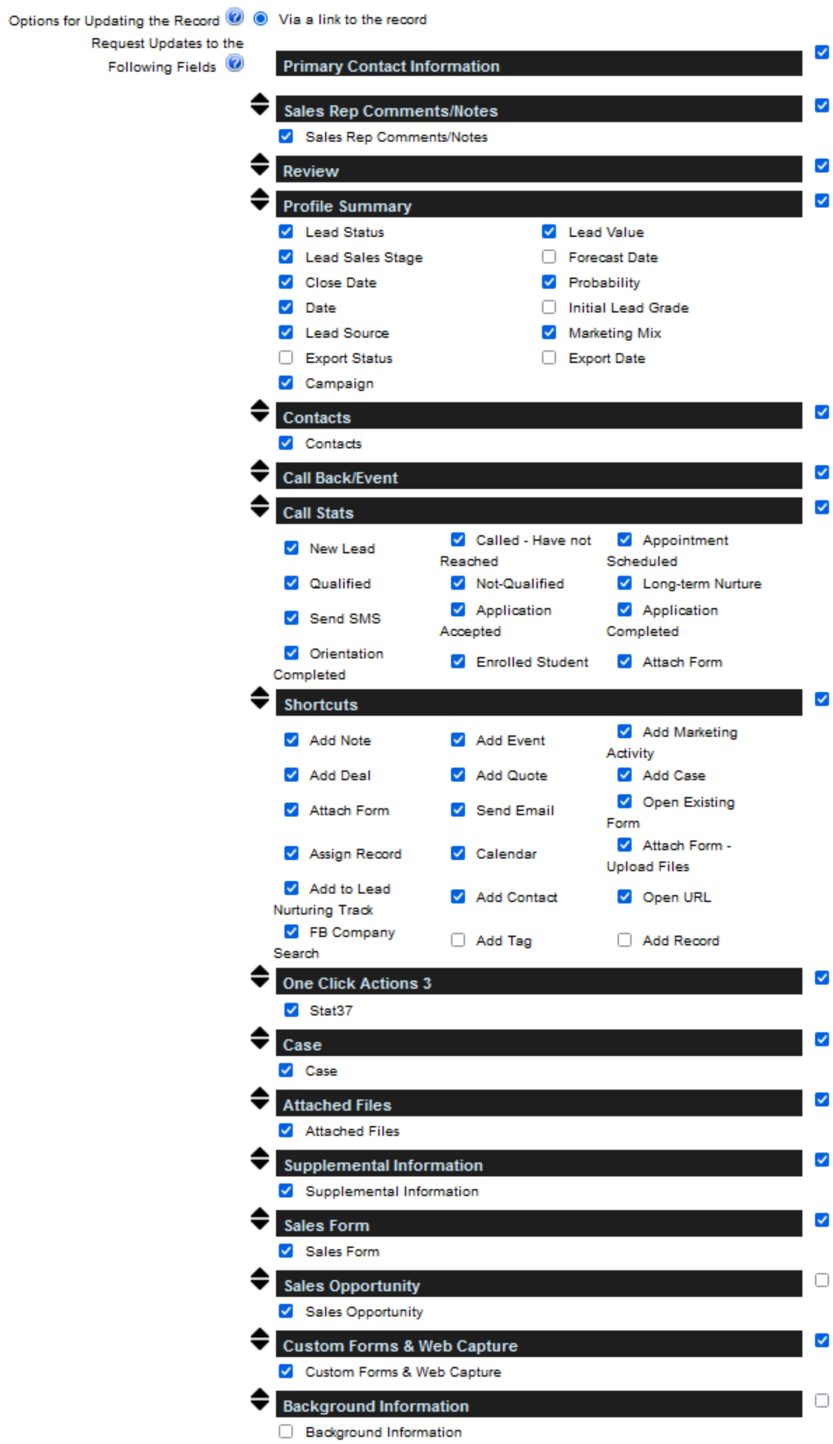
3. Customize the subject of the email; you can use the first Insert Merge Field to include information from the record in the subject.



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.



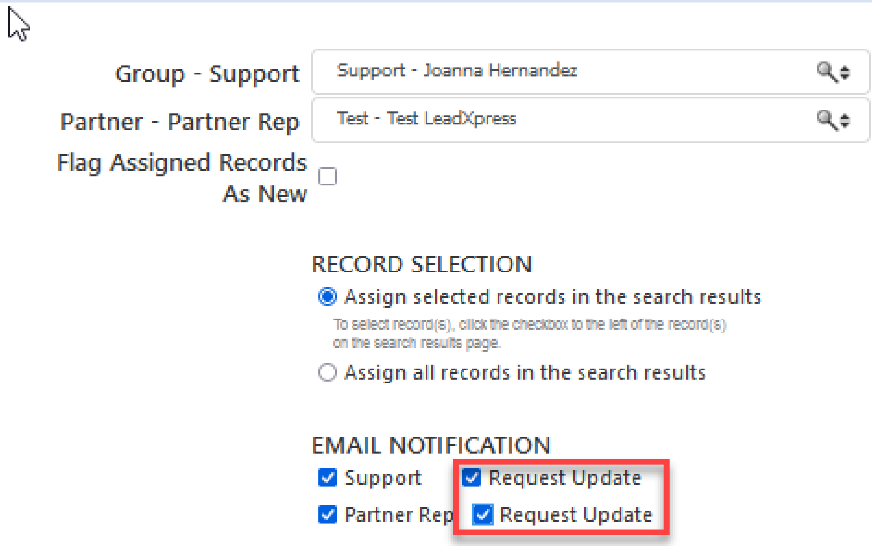
Please note, depending upon how you have your checkboxes configured in the Click Actions section, not all checkboxes will function as configured. For example, suppose you want to schedule an appointment or callback using one of the checkboxes.

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

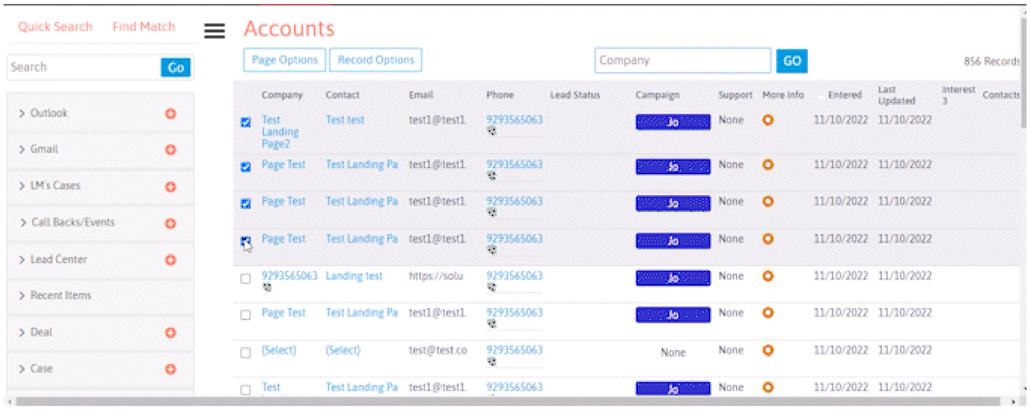
There are two ways to request an update to records; either through a **Request to Update Records** or when **Assigning Records**.

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



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



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