



CRM Solutions by LeadMaster



Lead-Xpress Sales Rep 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.

Depending upon the way your LeadMaster administrator has configured Lead-Xpress, you will receive an email with a request to update your accounts / records / leads with a link to a web form.

This method will allow you to update your account / record / lead in the LeadMaster Lead Management CRM System. The web form is customizable and can be as long or as short as needed to capture the desired information from the sales team.

This article provides a short explanation of both.

WORKING WITH THE REQUEST TO UPDATE RECORDS EMAIL

Here's an example of the Request to Update Records email:

Please take a few minutes to provide LeadMaster an update to the below leads. Please update the progress of each opportunity that's assigned to you.


Company is

Update Lead --> [click here](#)

Update all leads that have been assigned to you.

Visit your Lead Portal --> [Accounts](#) Good Selling!

To update a Record, you can either click on the **"Update Lead"** link which will redirect you to the Record page.



First Name

Last Name

Sales Update

Primary Contact Information - APP4 Updated Test q2c

Name Title Company Address 1 Address 2 Address 3 City State Zip Country Ultimate Dates	APP4 Updated Test q2c Web Address Parent Company Group Support Partner Partner Rep Campaign Phone Cell/Mobile Alternate Phone Tickets Title Code Date Entered	Fax Company Revenue Employee Size Unique ID Function Contacted Date Last Updated Email Industry Code
	Power Company Design Team Rank King Test Paula Rodriguez 2 Bugs 10/18/2022 2:07 PM - test@test.com 0	0/0 K 0 0 0 0 10/18/2022 2:07 PM - test@test.com 0

Review

32 tests due
PERMANENT - OUT
REVISED & APPROVED
TEST
NEW 10/18/2022 2:07 PM

Company Name APP4 Updated Test q2c	Phone Email Showing: test@test.com Lead Status	Campaign Bugs
--	--	-------------------------

Contacts

Contact Title APP4 Updated Test q2c	<input checked="" type="checkbox"/> P Phone Cell/Mobile	Alternate Phone Email test@test.com
---	---	--

Test Parameters

Lead Status	NEW	Lead Source	Dash - Dash	Date	
Lead Value	0.00 K	Close Date			
Lead Sales Stage		Probability			

Test Results

☐ New Lead
☐ Qualified
☐ Send SMS
☐ Orientation Completed

☐ Called - Have not Reached
☐ Not Qualified
☐ Application Accepted
☐ Enrolled Student

☐ Appointment Scheduled
☐ Long term Nurture
☐ Application Completed
☐ Attach Form

Custom Forms is Web Capture

No forms attached

Shortcuts


☐ Add Note
☐ Add Deal
☐ Attach Form
☐ Assign Record
☐ Add to Lead Nurturing Track
☐ FB Company Search
☐ Call Back/Event

☐ Add Event
☐ Add Quote
☐ Send Email
☐ Calendar
☐ Add Contact

☐ Add Marketing Activity
☐ Add Case
☐ Open Existing Form
☐ Attach Form - Upload Files
☐ Open URL

No Call Backs/Open Events

Or click on the **"Lead Portal"** link to access all of your assigned Records.


Leadland
RECOVERY

AB - Jo Hernandez

Welcome, Paula Rodriguez 2

Thursday - 11/10/2022 9:14 PM EST
Log out

Accounts

Records 1 thru 9 - (9 total records)

No criteria set
 Sorted By: **Entered descending**

Company

GO

Company	Contact	Email	Phone	Lead Status	Campaign	Support	Entered	Last Updated	Interest
<input type="checkbox"/> (select)	APP4 Updated Test q2e	test@test.com		NEW	Bugs	Russ King	10/9/2022	10/18/2022	
<input type="checkbox"/> (select)	add recordCS5ttttttt page5555555555555555	testwst@test.com		Attending	Jo - Campaign	Jo Admin	9/29/2022	10/9/2022	
<input type="checkbox"/> (select)	testdev4 jo	test@test.com		Test	None	Jo Admin	9/29/2022	10/3/2022	
<input type="checkbox"/> (select)	TestCK1 TestCK1	test33@test.com		Test	Bugs	Jo Admin	9/29/2022	10/3/2022	
<input type="checkbox"/> (select)	case 5400	case5400@test.com		Test	None	Jo Admin	9/29/2022	10/3/2022	
<input type="checkbox"/> (select)	Test3556666 Test3555666666	test5@test.com		Test	None	Jo Admin	9/28/2022	10/9/2022	
<input type="checkbox"/> (select)	Fname 3 Lname 3				Jo	Jo Admin	9/21/2022	11/10/2022	Radio 2
<input type="checkbox"/> (select)	Fname 3 Lname 3				Test	Jo Admin	9/21/2022	9/29/2022	
<input type="checkbox"/> QAS Test	Test APP3 Record	joanna.hernandez@leadmaster.com	123456789	LONG TERM / LEAD NURTURE	Test	Jo Admin	7/4/2022	8/8/2022	Interest 3

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COMPLETING THE WEB FORM

This form is customizable. You can decide not only which sections you want to include or exclude, but you can also customize many of the individual items inside the sections.

Contact Info – Provides basic company and contact info.

Click Action Check Boxes – By checking the box that corresponds with your update, the system will log, date and time stamp the information. This is the fastest and easiest way to update your records. All of these check boxes are user-definable.

Note: Please note that checking some boxes will result in corresponding actions that are programmed through LeadMaster's Automation and Workflow Management feature.

- Send Intro Email and Whitepaper
 - Add to Lead Nurturing, etc.
-

Profile Summary – These are user-definable fields. As shown here they help track both the status of the lead and once an opportunity is identified, the sales stage.

Because most of these fields include a list of choices, they provide a consistent way of tracking and measuring performance.

These fields are tied into reporting and charting so that progress is easily tracked on the LeadMaster dashboards.

When you've completed a sales call simply update the account using one or more of these fields.

Custom Forms – In addition to the standard LeadMaster sections (Contact Info, Click Actions, Profile Summary etc.), the LeadMaster administrator can also include fields and forms of your own design.

Sales Form				
X-Dates				
Auto X Date <input type="text"/>	WC X Date <input type="text"/>	Pkg X Date <input type="text"/>	Financial Services <input type="text"/>	Group X Date <input type="text"/>
Auto Carrier -- Please Select --	WC Carrier -- Please Select --	Pkg Carrier -- Please Select --	Misc Carrier -- Please Select --	Group Carrier -- Please Select --
Other Auto Carrier: <input type="text"/>	Other WC Carrier: <input type="text"/>	Other Pkg Carrier: <input type="text"/>	Other Misc Carrier: <input type="text"/>	Other Group Carrier: <input type="text"/>
Other Info				
Commercial Agency <input type="text"/>	Benefit Agency <input type="text"/>	Years w/ Commercial Agency <input type="text" value="0"/>	Years w/ Benefits Agency <input type="text" value="0"/>	
Telemarketing Distribution				
Interested in: <input type="checkbox"/> Health <input type="checkbox"/> Life <input type="checkbox"/> Auto <input type="checkbox"/> Disability <input type="checkbox"/> Workmans Comp <input type="checkbox"/> Liability <input type="checkbox"/> Business	Marital Status --- Please Select ---	Location <input type="radio"/> Urban Upscale <input type="radio"/> Urban Stable <input type="radio"/> Urban in Transition <input type="radio"/> Rural Upscale <input type="radio"/> Rural in Transition <input type="radio"/> Rural Stable	Age Bracket <input type="radio"/> Under 30 <input type="radio"/> 30 to 50 <input type="radio"/> 50 to 65 <input type="radio"/> Over 65	
Custom Survey/Lead Feedback				
Did you follow-up with this lead? <input type="radio"/> Yes <input type="radio"/> No Was the primary contact reached? <input type="radio"/> Yes <input type="radio"/> No What was the general response? <input type="radio"/> Positive <input type="radio"/> Negative				

Above are 4 examples of sections that can be designed by the LeadMaster administrator. These examples are related to the insurance industry.

- The first section contains expiration dates.
- The second section contains data about agencies.
- The third section contains customer survey data that may have come from a telemarketing program.
- The fourth section contains a survey for the sales rep on the quality of the lead.

All of these sections are designed to illustrate how an insurance company might use Lead-Xpress. This form could have just as easily been designed for any industry.

Sales Rep Comment/Notes – This section provides a place to record interactions with the customer.

All of the previous comments can be displayed in both the email and the web form.