



LEADMASTER CRM-PRO ADMINISTRATION GUIDE

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INTRODUCTION TO ADMINISTRATION

This guide has been developed for the purpose of documenting the features of the CRM application and to assist the administrator with the functions of the system.

Below are the available Administration functions (depending on your level of administrative access all of these may or may not be available).

To get the most out of this manual it is recommended that you go through it while you are logged into the system and click through the functions as you go read about them.

Administration

[Help Guide](#)
[Expand All](#)

User / Workgroup

- › Login Management / User Security
- › Company Hierarchy / Assignments
- › 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

Automation / Customization

- › Customize Screens & Fields / Record Mgmt
- › Marketing Automation / Workflow Mgmt
- › Custom Forms / Web Forms / Quotes
- › System Reports
- › Advanced Customization / Options
- › Advanced Administration
- › System Logs
- › System Management

Much of the maintenance for users and Workgroups can be accessed via the Administration button in the top banner of the application. There are several levels of administration authorization.

Access to administration features will vary according to your level of administration authorization.

The application is constantly being updated and improved. The pictures of the screen may vary slightly from what you see on your computer.

ADMINISTRATION FUNCTIONS DEFINED

Not all administration features will be available to all users. Certain Admin Privileges affect customer billing and will only be turned on by request. Here is a brief overview of the administration functions

USER/WORKGROUP

Login Management / User Security – maintain User Logons including privileges (eg. Email, Custom Forms, Lead Nurturing, Workflow Automation etc.), Homepage, data access restrictions and other key data elements. This is a key function and is covered in detail in the Logon Management article.

Company Hierarchy / Assignments – maintain the company hierarchy – the CRM has four levels of lead assignment: Group/Organization and Account Manager, Partner and Partner Rep.

Manage Workgroups – maintenance of user's workgroup parameters [may be set up as create/maintain or maintain only].

Automated Record Assignments – maintenance of automated assignment for the leads.

Track User Activity – query by Workgroup/User Type/Date Range to view individual user activity by # Logons, # Records Created and # Records Updated. This is especially useful for call center managers.

Track System Activity – provides different system and application activity reports.

Home Page / Dashboards / Shortcuts – Manage available shortcuts and dashboards at the Workgroup level. Any of the reports that are available can be turned into a shortcut on the home page. This is an easy way to make sure the things you do most often are only 2 clicks away. For example, a sales forecast can be a shortcut.

CAMPAIGN / MESSAGING / REPORTS

Campaign Management – maintain campaigns in terms of Campaign ID, Campaign Name and other Sales & Marketing information (including Survey Scripts).

Marketing / Email / Lead Nurturing Campaigns – maintenance of Email Templates, Marketing activities, lead nurturing and alternate email configuration.

Lead-Xpress / Email Notifications – for creation and maintenance of all system email notification templates.

Workgroup System Reports – list of available workgroup related reports.

Automation / Customization

Customize Screens & Fields / Record Mgmt – manage and maintain labels, Click-Actions and Section Orientation / Placement / Visibility for various pages.

Marketing Automation / Workflow Mgmt – manage and define business rules for both Call Stat functions and/or Profile Summary reference tables. For example, you may have a call stat button that marks the record that a call was placed today, puts a reminder in your calendar to call the prospect again tomorrow and sends the prospect an email saying you tried to reach them.

Custom Forms / Web Forms / Quotes – create, edit and maintain all custom forms associated with the workgroup. The custom forms are an easy to create / easy to use feature that allow you to essentially create a database within a database. You get to define the fields and layout. All the fields in the custom forms are searchable. It's a great way to extend the functionality of the system.

System Reports – list of advanced workgroup and system reports.

Advanced Customization / Options – manage and maintain integration settings and configuration, web links and currency options.

Advanced Administration – manage and maintain advanced administration settings for the Workgroup.

System Logs – list of available system logs – Email messages log, performance log and more.

System Management – allows administrators to manage and maintain system banner menus, reports, skins etc.

USER AND LOGON MANAGEMENT

The Logon Management function is where you set up the individual user logons. This can be **reached** via the Administration function in the top banner of the application. User Logons can be Added, Edited and Deleted via this function. Here is what the main Logon Management page looks like:



- ① User ID – User's unique ID
- ② First and Last Name – User's first and last name
- ③ Email Address – User's email address
- ④ Type – User Type
- ⑤ Database and Workgroup – list of database and workgroup that the user has access to
- ⑥ Created – date when the user and logon was created
- ⑦ Updated – date when the user and logon was last updated
- ⑧ Last Access – shows when the user last logged in
- ⑨ Status – shows if the user and logon is active, not active or deleted
- ⑩ Count – shows the number of counts the user accessed the CRM
- ⑪ Privileges – set of privileges and functions available for the user
- ⑫ Internal Setting – security options for the user
- ⑬ User Settings – where users can edit and update non-required and informational settings
- ⑭ Manage Logons – Option to add, import, export and download logons
- ⑮ Security Levels – add a set of security privileges for a particular set of users and then use that template when creating future user logons
- ⑯ Help Guide – link to the help topics
- ⑰ Reset Filters – clear your previous logon search criteria

SECURITY LEVELS

In order to help in the set up and standardization of user logons across a workgroup the application has a Security Level template feature that allows you to predefine a set of security privileges for a particular set of users and then use that template when creating future user logons.

The Security Levels template feature can be reached by clicking the Security Levels option on the Logon Management page.

Security Levels

[Logon List](#)
[New Level](#)

[All] A B C D E F G H I J K L M N O P Q R S T U V W X Y Z	Level Name: <input type="text"/>	GO
▼ Level Name	Workgroup(s) Assigned	
Jo5 - Account Manager	AB - Jo 5	

Click on one of the pre-configured security levels to open it. Click 'Save As' and give it a unique name. That security level is now visible to the entire workgroup from the Logon Management Page.

This makes creating a user logon fast and easy. If you want to go back and modify the privileges select the security level you want to change from the Security Levels page, make the changes and click submit. The application will ask you if you want to "Apply to all users with this template?"

The Security Levels template will allow for pre-defining all of the privileges below plus the Label Set and Companies field.

All of the available choices on the Security Levels page will be defined in the next section on [Logon Privileges](#).

USER TYPES

Administrator – a user who manages logons and workgroup configuration

Global User – a user who has access to all records in a workgroup without being restricted based on assignment of the record.

Organization – typically a sales or marketing manager

Account Manager – a sales rep with access limited to assigned records

Partner – a business partner sales or marketing manager

Partner Rep – a business partner sales rep with access limited to assigned records

ADDING A USER

CRM Users can be either your people who can log into the CRM system or people in your company's hierarchy who are assigned records or leads.

Add a User

Logon List

A ★ indicates a required field.

Workgroup	
★ First Name	<input type="text"/>
★ Last Name	<input type="text"/>
★ Email	<input type="text"/>
★ Username	<input type="text"/>
★ New Password	<input type="password"/>
★ Verify New Password	<input type="password"/>
Set Security	[... Available Levels ...] ⚙️
Send Login Info To New User?	<input type="radio"/> Yes <input checked="" type="radio"/> No ⚙️

1. Log into LeadMaster CRM
2. Go to **Admin/Administration page**
3. On the **Administration page**, under User/Workgroup section expand Login Management / User Security accordion and click on **Add User**. This will redirect you to the **Add User** page.
4. On **Add User** page, enter the following details:
 - **Workgroup** – pre-populated
 - **First Name** – User's First Name
 - **Last Name** – User's Last Name
 - **Email** – User's email address.
 - **Username** – Preferred username. We recommend using the user's email address for Username to avoid any conflicts.
 - **New Password** – Set the user's password. (For security reasons, the new password you have entered for the user is temporary. When the user logs into the system using the new password, they will be instructed to enter a new password.)
 - **Verify New Password** – Verify the new password
 - **Set Security** – Set the logon settings for the user based on the settings defined for the selected security template.
 - **Send Login Info To New User** – Choose whether to send the logon credentials to the new user by email or not.
5. Click **Submit**

CREATING A LOGON

Adding User Logons is similar when creating Users. Adding User Logons however allows the Administrator to set up advanced settings like user type, label set, workgroup access and privileges at the individual user level. User created from Add Logon page adds them to the logon list only and needs to be manually added to the hierarchy list.

Add Logon

Logon List Page Options Help Guide

SUBMIT Cancel

<p>User Information</p> <p>★ First Name</p> <p>★ Last Name</p> <p>★ Username</p> <p>★ New Password</p> <p>Verify New Password</p> <p>Group</p> <p>Level</p> <p>★ User Type</p> <p>Default Label Set</p> <p>User Status</p> <p>Set Security</p> <p><input type="checkbox"/> Bypass IP Restriction</p>	<p>Workgroup Access</p> <p>Searching</p> <p>Reporting</p> <p>Email Settings</p> <p>SMS</p> <p>Library</p> <p>Adding/Editing - Field Edits</p>	<p>Administration</p> <p>Integration Options</p> <p>Advanced Privileges</p> <p>Offline/Mobile Access Privileges</p> <p>Calendar and Callback / Events</p>
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Home Page

Adding Records

Viewing / Editing Records

Top Banner and Side Menu Items to Display

SUBMIT Cancel

1. Log into LeadMaster CRM
2. Go to **Admin/Administration page**
3. On the **Administration page**, under User/Workgroup section expand Login Management / User Security accordion and click on **Create New User Login**. This will redirect you to the **Add Logon** page.
4. On **Add Logon** page fill out the fields in the following sections:
 - User Information
 - Workgroup Access
 - Homepage
 - Adding Records
 - Viewing and Editing Records
 - Top Banner and Side Menu Items to Display
 - Searching
 - Reporting
 - Email Settings
 - SMS
 - Library
 - Adding/Editing Field Edits
 - Administration
 - Integration Options
 - Advanced Privileges
 - Offline/Mobile Access Privileges
 - Calendar and Callback Events
5. Click **Submit**

IMPORTING A LOGON

In addition to creating logons individually, logons can be created thru an Import routine. To access the import logon functionality your logon will need to be enabled with the "Logon Management" and "Import Logons" permission.

Once your logon has this permission you can go to Administration > Logon Management > Manage Logons option and click on Import Logons to access the Import Logon functionality.

Import Logons - Upload Your File

[Logon List](#) [Help Guide](#)

First, click [Browse...] to find your file, and then click [Next >>] to upload.

No file chosen

The import file must be a .csv file and have a header row and 19 columns. The columns must be in the following order:

1. Group / Partner Name
2. First Name
3. Last Name
4. Username
5. Password
6. Group
7. Default Page - 'Edit Profile', 'Sales Update' or 'View Profile'
8. Company
9. Title
10. Phone
11. Fax
12. Mobile
13. Email
14. Address1
15. Address2
16. City
17. StateCode - 2 character state code (e.g. 'AL')
18. Zip
19. CountryCode - 3 character country code (e.g. 'USA')

The maximum size of the import file is 5MB.

LOGON PRIVILEGES

There are three logon pages that define a user's privileges:

1. **Privileges** – this is where you can set up basic logon information and privileges at the individual user level.
2. **Internal** – security options for the user that further defines the users access to a particular workgroup.
3. **User profile** – where users can edit and update non-required and informational settings

PRIVILEGES PAGE

HOMEPAGE



Add / Edit / Delete Message Boards – allows the user to update the message board and the events / list manager section of the home page / information center.

Add / Edit / Delete View Dashboard Charts – allows the user to view and add reports and charts to the home page / information center.

ADDING RECORDS



Add New Records – allows the user to add and import records.

Enforce User Security with Check for Match – If checked, enforces user security when checking for a match. If not checked, all records in the workgroup are included when checking for a match.

The Check for Match function respects the security hierarchy and is designed to prevent duplicate records within the Workgroup.

If users are set up as Account Managers and Partner Reps in the Hierarchy and their Logon type set up as the same - Acnt Mgr and Partner Rep - with Enforce Security enabled with Check for Match on the Logon Privilege page:

Their Check for Match will return all matching Records within the Workgroup - showing Records not assigned to them as plain text - and Records assigned to them as hyperlinked - for their access.

If the Enforce Security with check for match is disabled - Users can see the check for match results with hyperlinks and they can access all the Matching Records regardless of the User Type.

If a User is set up as an Account Manager in the Hierarchy - with User Type - Administrator or Global User - the Check for Match Result will return all matching records as hyperlinked - regardless of assignment and regardless whether the Enforce Security with check for match is disabled or enabled.

Clone Contact to new Record – allows the user to clone an existing contact from the Contacts section of the Record page and create a new Record from the contact information.

Add Call Back – allows the user to add a call back when adding new records.

Import Records – allows the user to import records, append comments to records, view imported records and manage import records templates.

Import Records – Import to a Custom Form – allows the user to import records to a custom form attached to a record.

Import Records – Match to Existing Contacts – this is a de-duplication feature; it allows the user to match existing contacts and add additional contacts to a record instead of creating a new record for the contact. For example, suppose XYZ Company had 10 employees. You could either have 10 records for those employees or you could use this feature to put all 10 employees in a single record for XYZ Company.

Import Records – View All Imported Records – allows the user to view details of imports and back out imported records for the workgroup, included other user's imports for the workgroup.

Import Records – Deduplication – A deduplication feature that allows a user to find and manage duplicate records.

VIEWING AND EDITING RECORDS

Viewing / Editing Records	Viewing / Editing Records
<input checked="" type="checkbox"/> Access to "Sales Update" page	<input checked="" type="checkbox"/> Add Custom Form
<input checked="" type="checkbox"/> Access to "Edit Profile" page	<input checked="" type="checkbox"/> Edit Custom Form
<input checked="" type="checkbox"/> Access to "Review And Take Action" page	<input checked="" type="checkbox"/> Delete / Move Custom Form
<input checked="" type="checkbox"/> Show Custom Forms Section	<input checked="" type="checkbox"/> Assign Records
<input checked="" type="checkbox"/> Show Attached Files Section	<input checked="" type="checkbox"/> Team Selling
<input type="checkbox"/> Show Profile Summary Section	<input checked="" type="checkbox"/> Allow Partner View
<input checked="" type="checkbox"/> Show Record Quick Actions - 1 Section	<input checked="" type="checkbox"/> Share Records
<input checked="" type="checkbox"/> Show Record Shortcuts Section	<input checked="" type="checkbox"/> Clone Records
<input checked="" type="checkbox"/> Show Record One Click Actions 3 Section	<input checked="" type="checkbox"/> Archive Records
<input type="checkbox"/> Bypass Mandatory Quick Actions Update	<input type="checkbox"/> Delete Records
<input checked="" type="checkbox"/> Show Opportunities Section	<input checked="" type="checkbox"/> Clone Opportunities
<input checked="" type="checkbox"/> Show Callbacks / Events Section	<input checked="" type="checkbox"/> Add / Delete Marketing Activities
<input checked="" type="checkbox"/> Show Background Information Section	<input checked="" type="checkbox"/> Add / Edit / Delete / View Cases
<input type="checkbox"/> Allow Add of Background Information	<input checked="" type="checkbox"/> Delete Email Messages
<input checked="" type="checkbox"/> Edit Background Information	<input checked="" type="checkbox"/> Allow "Click to Dial" for Phone Numbers
<input checked="" type="checkbox"/> Show Cases Section	<input checked="" type="checkbox"/> Add to Lead Nurturing Tracks
<input checked="" type="checkbox"/> Show Quotes Section	<input checked="" type="checkbox"/> Can be assigned Cases
<input checked="" type="checkbox"/> Create Proposals	<input type="checkbox"/> Can move Cases
<input checked="" type="checkbox"/> Add / Edit Contacts	

Access to 'Record/Sales Update' Page – allows the user to access the 'record update' page for a record.

Access to 'Edit Profile' Page – allows the user to access the 'edit profile' page for a record.

Access to 'Review and Take Action' Page – allows the user to access the 'review and take action' page for a record.

Show Custom Forms Section – turns on or off the display of the "Custom Forms" section on the "Record Update", "Edit Profile" and "View Profile" pages and the "Contacts" popup dialog page. This setting works in conjunction with the configuration of the display of sections in the "Record Update", "Edit Profile" and "View Profile" pages. (see the "Customize Pages" feature in the "Administration" page)

Show Attached Files Section – turns on or off the display of the "Attached Files" section on the "Record Update", "Edit Profile" and "View Profile" pages. This setting works in conjunction with the configuration of the display of sections in the "Record Update", "Edit Profile" and "View Profile" pages. (see the "Customize Pages" feature in the "Administration" page)

Show Profile Summary Section – turns on or off the display of the “Profile Summary” section on the “Record Update” and “View Profile” pages. This setting works in conjunction with the configuration of the display of sections in the “Record Update” and “View Profile” pages. (see the “Customize Pages” feature in the “Administration” page)

Show Quick Actions Section – turns on or off the display of the “Call Center Stats” section on the “Record Update”, “Edit Profile” and “View Profile” pages. This setting works in conjunction with the configuration of the display of sections in the “Record Update”, “Edit Profile”, “View Profile” and “Search” pages (see the “Customize Pages” feature in the “Administration” page) and also in conjunction with the “Call Center Stats” setting for the workgroup. (see the “Manage Workgroups” feature in the “Administration” page).

Show Quick Actions II Section – turns on or off the display of the “Quick Actions II” section on the “Record Update”, “Edit Profile” and “View Profile” pages. This setting works in conjunction with the configuration of the display of sections in the “Record Update”, “Edit Profile”, “View Profile” and “Search” pages (see the “Customize Pages” feature in the “Administration” page) and also in conjunction with the “Call Center Stats” setting for the workgroup. (see the “Manage Workgroups” feature in the “Administration” page).

Show Quick Actions III Section – Turns on or off the display of the “Quick Actions III” section on the “Record Update”, “Edit Profile” and “View Profile” pages. This setting works in conjunction with the configuration of the display of sections in the “Record Update”, “Edit Profile”, “View Profile” and “Search” pages (see the “Customize Pages” feature in the “Administration” page) and also in conjunction with the “Call Center Stats” setting for the workgroup. (see the “Manage Workgroups” feature in the “Administration” page).

Bypass Mandatory Quick Actions Update – allows the user to bypass the mandatory update on quick action section.

Show Opportunities Section – turns on or off the display of the “Opportunities” section on the “Record Update” and “Edit Profile” pages. This setting works in conjunction with the configuration of the display of sections in the “Record Update” and “Edit Profile” pages (see the “Customize Pages” feature in the “Administration” page) and also in conjunction with the “Track Opportunities” setting for the workgroup. (see the “Manage Workgroups” feature in the “Administration” page).

Show Callbacks / Events Section – turns on or off the display of the “Callbacks / Events” section on the “Record Update” and “Edit Profile” pages. This setting works in conjunction with the configuration of the display of sections in the “Record Update” and “Edit Profile” pages. (see the “Customize Pages” feature in the “Administration” page)

Show Lead Highlight Comments (Background Information) Section – turns on or off the display of the “Lead Highlight Comments” section on the “Record Update”, “Edit Profile” and “View Profile” pages. This setting works in conjunction with the configuration of the display of sections in the “Record Update”, “Edit Profile” and “View Profile” pages. (see the “Customize Pages” feature in the “Administration” page).

Allow Add of Background Information – enabling would add a background information and view existing background information.

Edit Lead Highlight Comments (Background Information) Section -Allows a user to update lead comments (background information) on the “Edit Profile” page.

Show Cases Section – turns on or off the display of the “Cases” section on the “Record Update” and “Edit Profile” pages. This setting works in conjunction with the configuration of the display of sections in the “Record Update” and “Edit Profile” pages (see the “Customize Pages” feature in the “Administration” page) and also in conjunction with the “Add / Edit / Delete / View Cases” setting for the user and with the “Access To Case Management” setting for the workgroup. (see the “Manage Workgroups” feature in the “Administration” page).

Show Quotes Section – turns on or off the display of the “Quotes” section on the “Record Update”, “Edit Profile” and “Add/Edit Opportunity” pages. This setting works in conjunction with the configuration of the display of sections in the “Record Update”, “Edit Profile” and “Add/Edit Opportunity” pages (see the “Customize Pages” feature in the “Administration” page) and also in conjunction with the “Access to Quotes” setting for the workgroup. (see the Manage Workgroup features for additional details).

Add / Edit Contacts – allows a user to add a contact to a record and allows a user to update contacts associated with a record.

Create Proposals – allows a user to create proposals.

Add Custom Form – allows a user to attach a custom form to a record, contact or opportunity.

Edit Custom Form – allows user to attach a custom form when adding a record. Also controls whether a sales form or feedback form displayed in the “Record Update” page is updateable; whether custom forms attached to a record are updateable and whether a custom form displayed in the “Opportunity Edit” page is updateable.

Delete/Move Custom Form – Allows a user to delete a custom form attached to a record, contact or opportunity. Also allows a user to delete a custom form (from the “Manage Custom Forms” feature in the “Administration” page).

Assign Records – allows a user to assign records to other users.

Team Selling – allows multiple Account Managers and/or Partner Reps to access records. Team Selling must be enabled in Manage Workgroups. To assign multiple reps to a record the user must have Team Selling enabled in Logon Management. Users do not need to have Team Selling enabled to simply access a record with multiple reps. Team Selling in Logon Management should only be enabled for Users you want to have the privilege to assign multiple reps to an account. Team Selling Respects the hierarchy and security privileges. An Account Manager or Partner reps with the Team Selling privilege enabled will only be able to see the reps in their Group for Account Managers and in their Partner for Partner Reps.

Allow Partner View -for users with "User Type" equal to "Partner Rep", and for features that include a list of partner reps (e.g. assign record, add / update records, add / update callbacks), allows the user to assign to other partner reps for the same partner to which the user belongs.

Share Records – allows a user to share access to records.

Clone Records – allows a user to clone a record.

Archive Records – allows a user to search for archived records, archive a record or records, restore archived records and merge records.

Delete Records – allows a user to delete a record or records.

Clone Opportunities – allows a user to clone an opportunity.

Add / Delete Marketing Activities – allows a user to add and delete marketing activities.

Add / Edit / Delete / View Cases – Allows a user to add, view, update and delete cases.

Delete Email Messages – Allows a user to delete email messages associated with a contact.

Allow "Click to Dial" for Phone Numbers – Allows the user to one of the integrated dialing programs. Features range from simple dialing to advanced call center functions like Predictive dialing with advanced reporting. You may also use tools like Skype & Telify in Firefox for click-to-dial.

Add to Lead Nurturing Tracks – allows the user to add contacts to lead nurturing tracks.

Can be assigned Cases – allows a user to be assigned cases.

Can move Cases – allows a user to move cases from one record to another.

TOP BANNER AND SIDE MENU ITEMS TO DISPLAY



Top Banner and Side Menu Items to Display	
<input checked="" type="checkbox"/> Accounts	<input checked="" type="checkbox"/> Events
<input checked="" type="checkbox"/> Contacts	<input checked="" type="checkbox"/> Opportunity
<input checked="" type="checkbox"/> Search	<input checked="" type="checkbox"/> Lead Center
<input checked="" type="checkbox"/> Find Match	<input checked="" type="checkbox"/> My Searches
	<input checked="" type="checkbox"/> My Reports/Charts
	<input checked="" type="checkbox"/> Recent Items
	<input checked="" type="checkbox"/> My Task
	<input checked="" type="checkbox"/> My Cases
	<input checked="" type="checkbox"/> Smart Queue
	<input checked="" type="checkbox"/> Mail Manager

Accounts – enables the “account” top menu for the user.

Contacts – enables the “contacts” top menu for the user.

Search – enables the “search” top menu for the user.

Find Match – enables the “find match” feature for the user – visible on the top left panel of the homepage.

Events – enables the events accordion for the user.

Opportunity – enables the “Opportunity” accordion for the user.

Lead Center– enables the “Lead Center” accordion for the user.

My Searches – enables the “My Searches” accordion for the user.

My Reports/Charts– enables the “My Reports and Charts” accordion for the user.

Recent Items – enables the “Recent Items” accordion for the user.

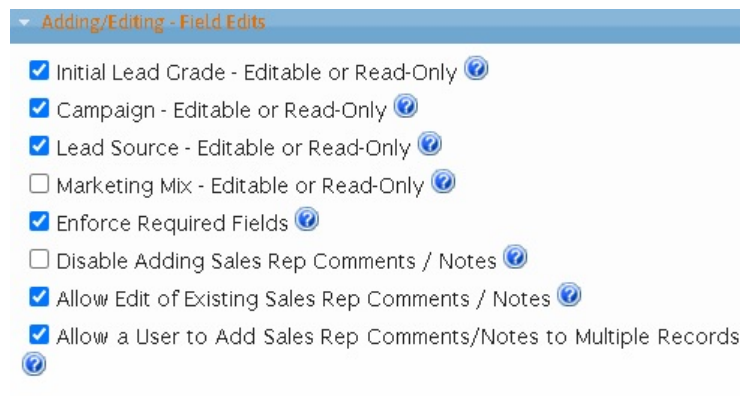
My Task– enables the “My Task” accordion for the user.

My Cases– enables the “My Cases” accordion for the user.

Smart Queue– enables the “Smart Queue” accordion for the user.

Mail Manager– enables the “Mail Manager” accordion for the user.

ADDING/EDITING – FIELD EDITS



Adding/Editing - Field Edits

- ☒ Initial Lead Grade - Editable or Read-Only ?
- ☒ Campaign - Editable or Read-Only ?
- ☒ Lead Source - Editable or Read-Only ?
- ☐ Marketing Mix - Editable or Read-Only ?
- ☒ Enforce Required Fields ?
- ☐ Disable Adding Sales Rep Comments / Notes ?
- ☒ Allow Edit of Existing Sales Rep Comments / Notes ?
- ☒ Allow a User to Add Sales Rep Comments/Notes to Multiple Records ?

Initial Status – Read-Only – When checked, makes Initial Status read-only once it has a value.

Campaign – Read-Only – When checked, makes Campaign read-only once it has a value.

Lead Source – Read-Only – When checked, makes Lead Source read-only once it has a value.

Marketing Mix – Read-Only – When checked, makes Marketing Mix read-only once it has a value.

Enforce Required Fields – When checked, enforces required fields on the Edit Profile and Record Update pages and on Add / Edit Opportunity page.

Disable Adding Sales Rep Comments / Notes – When not checked, allows the user to add sales rep comments to a record and edit existing sales rep comments. (if 'Allow Edit of Existing Sales Rep Comments / Notes' is checked).

Allow Edit of Existing Sales Rep Comments / Notes – When checked, allows editing of existing sales rep comments. When this field is checked you'll see all of the HTML tags in the Sales Rep Comments / Notes.

Allow Edit of Sales Rep Comments / Notes to multiple Records – When selected allows the user to add comments to multiple records without updating any other fields.

WORKGROUP ACCESS

The Workgroups field allows for the assignment of a user to one or more workgroups via a single logon. Note that logon privileges defined in the Logon Management privileges page apply to all workgroups that the user is given access to.

If a user needs different levels of access to one or more workgroups then multiple logons must be created. Only the Global User and Administrator can have access to more than one Workgroup from a single logon.

Have Access To – This is the workgroup(s) that are available to the Username that is currently being configured.

SEARCHING

Searching

Search Type: Power Search

- ☒ Search Custom Forms
- ☒ Download Records
- ☒ Create Public Search / Download Templates
- ☒ Access to Public Saved Searches
- ☒ Create Searches For Other Users (Only active for User Type of Administrator)
- ☒ Remove Ability to Bypass Security on Saved Search

Show the filter menu: Active

Search Type

If "Search Type" is "Advanced Search", "Power Search", "Sales" or "Call Center", the user can search company revenue, employee size, keyword, custom forms, title code, function code and campaigns.

If "Search Type" is "Advanced Search", "Power Search", "Sales" or "Call Center", the user can search for fields in the "Assignment" section, probability, lead value and forecast date.

If "Search Type" is "Advanced Search", "Power Search" or "Call Center", the user can search industry code. (sic code)

If "Search Type" is "Power Search" or "Call Center", the user can search for fields in the "CRM Management" section.

If "Search Type" is "Power Search" or "Sales", the user can search for fields in the "Opportunity" section.

Search Custom Forms – Allows a user to search for records based on data found in custom forms.

Download Records – Allows a user to download records using custom download templates from the "Search Results" page. Also allows a user to manage download templates from the search results page and to download contacts from the "Contacts" page.

Create Public Search / Download Templates – Allows a user to create public saved searches. Also allows a user to create public download templates used to download records from the "Search Results" page.

Access to Public Saved Searches – Allows a user to access and run public saved searches.

Create Searches for Other Users (only active for Administrators) – Allows a user to save a search for another user. (user saving search must have a “User Type” setting of “Administrator”)

Remove Ability to Bypass Security on Saved Search – Allows a user to remove the line “Apply Security from Selected User” when creating a Saved Search.

Show the filter menu – enables the filter option for the user on search page results.

REPORTING



Run Reports – Allows a user to access reports from the home page and search results

Add / Edit / Delete Custom Reports – Allows a user to create, edit and delete custom reports

EMAIL SETTINGS

Email Settings

- ☒ Send Email Message
- ☒ Receive Email Messages
- ☒ Receive Email Notification Message
- ☒ Send Bulk Email Messages
- Number of email messages allowed:
 - Per Day
 - Per Search
- ☒ Add / Edit / Delete Group Email Templates
- ☒ Access to Group Email Templates
- ☐ Email Opportunities to All Reps

Send Email Message – Allows a user to send an email message to the primary contact or any contacts from the record update, edit profile or view profile pages.

Receive Email Messages – Allows a user to receive email notifications.

Receive Email Notification Messages – Controls whether an express email notification message is sent to a user who is an account manager or a partner rep when a record is assigned

Send Bulk Email Messages – Allows a user to send email messages to contacts from the “Search Results”, “Accounts” and “Contacts” pages

Bulk email Messages Allowed:

Per Day – Sets a maximum limit on email messages per day.

Per Search – Sets a maximum limit on email messages per search.

Add / Edit / Delete Group Email Templates – Allows a user to add, update and delete group email message templates.

Access to Group Email Templates – Allows a user to access and use group email message templates when sending email messages.

Email Opportunities to All Reps – Allows a user to email opportunity to multiple people in hierarchy.

LIBRARY



View Library – Allows a user to view the library.

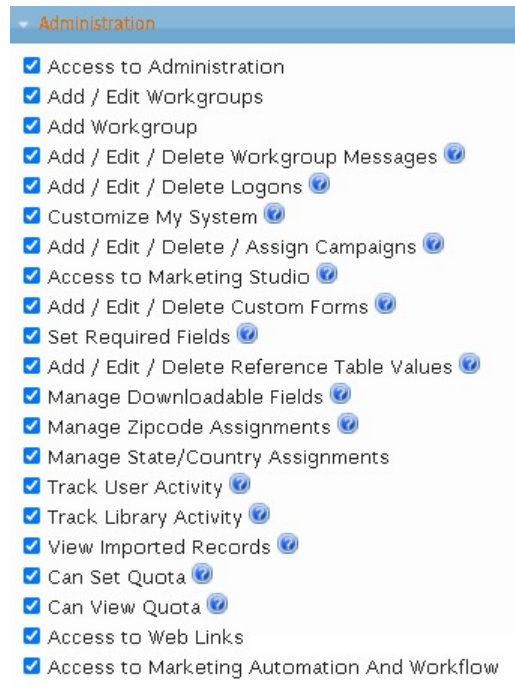
Add Files – Allows a user to upload files into the library.

Add / Edit Public Folders and Files – Allows a user to manage folders and files in the library.

Add / Edit Private Folders & Files – Allows a user to manage private folders and files in the library.

Delete Files – Allows a user to delete files and folders from the library.

ADMINISTRATION



Access to Administration – Allows access to things like Logon Management, Workgroup Management, Custom Forms etc.

Add/Edit Workgroups – Allows a user with the “Access to Administration” privilege to manage Workgroups.

Add Workgroup – Allows a user with the “Access to Administration” privilege to add Workgroups.

Add/Edit/Delete Workgroup Messages – Allows a user with the “Access to Administration” privilege to customize messages for workgroup(s) that are displayed to users at logon.

Add / Edit / Delete Logons – Allows a user with the “Access to Administration” privilege to manage the logons for a workgroup.

Customize My System – Allows a user with the “Access to Administration” privilege to customize pages in the application and customize the labels for fields in the application.

Add / Edit / Delete / Assign Campaigns – Allows a user to add, view, update and delete campaigns. Also allows a user to create a new campaign when importing records and to assign a campaign to records in search results.

Access to marketing Studio – Allows a user to view Marketing Studio menu in Top Banner Menu or sub Menu.

Add / Edit / Delete Custom Forms – Allows a user with the “Access to Administration” privilege to add, update and delete custom forms and add, update and delete web form to custom form mappings.

Set Required Fields – Allows a user with the “Access to Administration” privilege to set required fields. Required fields are those that must be completed prior to submitting the record for updating in the database.

Add / Edit / Delete Reference Table Values – Allows a user with the “Access to Administration” privilege to set manage reference tables. Reference tables allow you to modify things like drop down lists. For example, Lead Status = Hot, Warm, Cold.

Manage Downloadable Fields – Allows a user with the “Access to Administration” privilege to specify the fields available to download.

Manage Zipcode Assignments – Allows a user with the “Access to Administration” privilege to specify logic for record assignment based on zip code.

Manage State/Country Assignments – Allows a user with the “Access to Administration” privilege to specify logic for record assignment based on State/Country.

Track User Activity – Allows a user to view the “Administration” page and to report on user activity for a period of time and for a particular workgroup or workgroups.

Track Library Activity – Allows a user to report on library activity for a period of time.

View Imported Records – Allows a user with the “Access to Administration” privilege to manage imported records.

Can Set Quota – Allows a user to set quota for other users.

Can View Quota – Allows a user to view quota.

Access to Web Links – allows user access to web links feature.

Access to marketing Automation and Workflow – allows user access to manage Automation and Workflow.

INTEGRATION OPTIONS

Integration Options

- ☒ Upload Contacts to eMarketing System
- ☒ Upload Contacts to Lead Nurturing System
- ☐ Allow Zapier Access

Upload Contacts to eMarketing System – Allows a user to upload a record or records or contacts to an e-Marketing system.

Upload Contacts to Lead Nurturing System– Allows a user to upload a record or records or contacts to a CRM system.

Allow Zapier Access – allows users to access and link their logon credentials to Zapier.

ADVANCED PRIVILEGES

Advanced Privileges

- ☒ Access to Update/Append Records
- ☒ Update Multiple Records
- ☒ Update Multiple Contacts
- ☒ Update Multiple Opportunities
- ☒ Access to Import Opportunities
- ☐ Allow Edit of Existing Opportunity Notes
- ☐ Is Billable
- ☒ Show Support Link
- ☒ Show Delete Custom Forms on Record
- ☒ Bypass Timestamps on Mass Update & Sync Custom Fields
- ☐ View Masked Data

Access to Update/Append Records – Allows the user to replace specific fields in the system, including custom fields. This cannot be undone. It can't be backed out.

Update Multiple Records – Allows a user to update specific fields in multiple records at a time.

Update Multiple Contacts – Allows a user to update specific fields in multiple contacts at a time.

Update Multiple Opportunities – Allows a user to update specific fields in multiple opportunities at a time.

Access to Import Opportunity – Allows the user to import opportunities and load them into the opportunity section of the record for a company. This is a valuable tool for importing data from another CRM system.

Allow Edit of Existing Opportunity Notes – Allows a user to edit existing opportunity notes.

Is Billable – when checked, user is billable.

Show Support Link – enables the support link top menu.

Show Delete Custom Forms on Record – When enabled, allows users Level 6 and above to see a delete button next to each custom form in the list of custom forms on the record. Clicking on the delete button next to a custom form allows the user to delete the custom form without having to open it.

Bypass Timestamp on Mass Update and Sync Custom Fields – allows a user to bypass timestamp when doing a mass update.

View Masked Data – When View Masked Data is enabled the user will be able to see masked data in the clear. The user will also be able to report and download masked data so that it is visible.

OFFLINE/MOBILE ACCESS PRIVILEGES

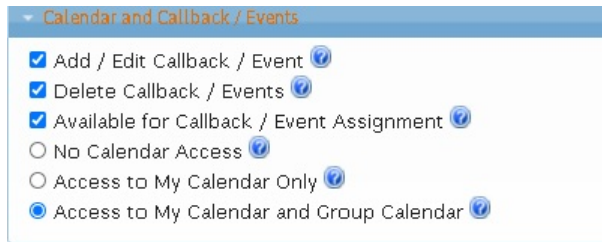
Offline/Mobile Access Privileges		
<input checked="" type="checkbox"/> Offline client access	Last accessed	Version
<input checked="" type="checkbox"/> Mobile access	Last accessed	
<input checked="" type="checkbox"/> Outlook Sync Access	Last accessed	Version
<input checked="" type="checkbox"/> Email History Access	Last accessed	Version

Mobile access – Allows a user to access their data through their cell phone browser or PDA. Works well for Android, iPhone, Blackberry, iTouch and other mobile devices.

Outlook Sync access – Allows a user to synchronize their online data. Requires installation of separate add-on module on user's PC, **NOTE** – Logons with Sync access may only have access to ONE workgroup for that logon.

Email History access – Allows a user the ability to log and sync Outlook emails from the user's PC to the matching email address associated with multiple records/contacts on the server (requires installation of separate add-on module on user's PCs)

CALENDAR AND CALLBACK/EVENTS



Calendar and Callback / Events

- ☒ Add / Edit Callback / Event
- ☒ Delete Callback / Events
- ☒ Available for Callback / Event Assignment
- ☐ No Calendar Access
- ☐ Access to My Calendar Only
- ☒ Access to My Calendar and Group Calendar

Add/Edit Callback/Event – Allows a user to add a new callback to a record. Also allows a user to mark a callback as completed and to update a callback.

Delete Callback/Event – Allows a user to delete a callback.

Available for Callback/Event Assignment – Indicates that the user can be listed and available for callback assignments.

No Calendar Access – Removes user access to calendar.

Access to My Calendar Only – User has access to the individual calendar but not the group calendar. User can't access the callbacks on the group calendar.

Access to My Calendar and Group Calendar – User has access to both the individual calendar and the group calendar. User can access the callbacks on both their individual calendar as well as the group calendar.

INTERNAL SECURITY PAGE

After setting up the user logon page the administrator will be presented with the Internal Security page (also available for existing logons by clicking on the hyperlink (Internal) on the main Logon Management page) that further defines the users access to a particular workgroup.

For Admin level logons that have access to more than one workgroup the user will be presented with a “summary” level page showing all workgroups, such as below:

Privileges

Internal Security

User Settings

J -

Logon List

Help Guide

Workgroup	Message Board	Label Set	Campaign Access	State Access	Zip Code Access	Country Access	
AB - Jo	Services Info Center	AB - Jo	STY	AL	010	ALL	settings
AB - Jo 2 - Refresh	Services Info Center	Default Override	ALL	ALL	ALL	ALL	settings

The Internal Security attributes for each workgroup can be viewed by clicking on the Settings hyperlink. If the logon has access to only one workgroup then this page will not appear and it will automatically display the detailed Internal Security page below.

The individual Internal Security level can be edited by clicking on the hyperlink. Below is an example of the detailed Internal Security level for a single workgroup:

Workgroup: AB - Jo 2 - Refresh ▼
InfoHub: Services Info Center ▼
Label Set: Do not set (Let user default override) ▼
Listed in Call Back Assignment: ☒ Yes ☐ No
Access to Lead Nurturing: ☒ Yes ☐ No
Access To Call Tracking: ☐ Yes ☒ No

Workgroup – This shows the Workgroup being configured for the logon’s internal setting.

Infohub – This is where you select the Infohub or Info Center to be presented to the user when they log into a particular Workgroup via this user logon.

Label Set – This option establishes what Label Set will be used for this Logon/Workgroup

Listed in Callback Assignment – Controls whether the user/logon being configured is available for callback assignment.

Access to Lead Nurturing – Controls whether the user/logon being configured can access the Campaign Management functions which includes Lead Nurturing.

Access to Call Tracking – Controls user’s access to track calls.

CAMPAIGN / GEOGRAPHY ACCESS

Campaign / Geography Access

Campaigns	States	Zip Codes	Countries
[... ALL ...]	[... ALL ...]	[... ALL ...]	[... ALL ...]
[... No value ...]	[... No value ...]	[... No value ...]	[... No value ...]
Bulk Email	ALABAMA	010 MA Holyoke	Australia
Campaign 2	ALASKA	011 MA Springfield	CANADA
Dialer	Alberta	012 MA Pittsfield	UNITED STATES

Campaign / Geography Access – This function restricts access to selected campaigns / geography. For example, if an account manager does not have any assigned records in a campaign called Google Ads, by selecting the 'Google Ads' campaign in Internal Settings, the Account Manager will see zero records as a result of a search for Google Ads records. Internal Settings do not provide access to records that are not assigned to that Account Manager but rather limit access.

NOTE:

These additional restrictions are usually used only by User Types: Global Users and Administrators – since access at the Group, Account Manager, Partner, Partner Rep level are already restricted to only those records assigned to that particular level

SEARCH FILTER ACCESS

Limit Access to Companies Using a Search Filter – This restriction applies to all user types – Global User, Administrator, Group, Account Manager, Partner, Partner Rep. Once you click the checkbox, you'll be presented with the LeadMaster search engine where you can select your choice of things to search on.

The restrictions you add via the search engine will be in addition to any restrictions placed on the user account already in place. To clarify, if a user can't see records before the search engine restrictions, they won't be able to see them after the search engine restrictions. For example, suppose a Partner Rep had access to all the records in the state of Texas you might use a search filter to restrict their access to the records only in Dallas and Houston.

This does not have any bearing on what a logon sees on the Search page. It is strictly applied to Search results.

This internal setting provides [LeadMaster](#) users with the ultimate control over who has access to records in the [LeadMaster CRM](#).

LIBRARY PRIVATE FOLDERS ACCESS

The screenshot shows a configuration window for 'Private Root Folders'. On the left, a list box contains '[--- ALL ---]' and 'Templo'. In the center, there are two buttons: 'Add >>' and '<< Remove'. On the right, a list box labeled 'Has Access To:' is currently empty.

Private Root Folders – List of private folders in the Workgroup’s Library.

Has Access To – List of Library Folders that are available to the User/Logon that is currently being configured.

REPORTS

The screenshot shows a configuration window for 'Reports'. It is divided into several sections:

- Available Reports:** A list box containing 'Custom Reports' (highlighted in red), 'Call Center Stats Summary Report', 'Call Center Stats Detail Report', 'All Seasons Solar - Marketing ROI Report', 'Activity Hub', 'Sales Deals' (highlighted in red), 'Deals - Overview Report', and 'Deals - Full Details Report'.
- Has Access To:** A list box containing '[--- ALL ---]'.
- Access to Call Center Stat Reports:** A section with four checked checkboxes: 'Quick Actions Summary (Chart)', 'Quick Actions I - Detail Report', 'Quick Actions I (Chart)', and 'Quick Actions I (By Campaign)'.
- Access to Case Management Reports:** A section with four checked checkboxes: 'All Cases', 'Open Cases - by Owner', 'Open Cases - by Assignee', and 'Overdue Cases'.

In the center, there are two buttons: 'Add >>' and '<< Remove'.

Reports – The Reports function can be used to explicitly define what reports this logon will be allowed to see for this Workgroup.

EMAIL TEMPLATE PRIVATE FOLDERS ACCESS

Email Template Private Folders – Allows the user to be set up to view Email Templates folders that have been set up as private in this Workgroup.

GROUP/PARTNER ACCESS

Group	Partner
[--- ALL ---]	[--- ALL ---]
[--- No value ---]	[--- No value ---]
Atlantic	Advanced Systems
Gulf	Global Technologies
Procter & Gamble	Mark Langley - Gulf

OR

Account Manager	Partner Rep
[--- ALL ---]	[--- ALL ---]
[--- No value ---]	[--- No value ---]
J -	JjAdmin 6
JoannaH ActMan	Paula Doe
Jo ActMan 2	Jo IV H

* Note: Selecting Account Manager(s) or Partner Rep(s) will override any selections for Group and Partner.

Group/Partner Access – This function allows for an Administrator type logon to be restricted at the Group/Partner or Account Manager/Partner Rep level [this should only be used for User Type = Administrator]. This can be used for the purpose of setting up other level of access such as one that might have access to several Groups such as a regional manager.

USER PROFILE/SETTINGS PAGE

After setting up the Security Logon page the user will be presented with the User Profile page (also available for existing logons by clicking on the User Settings hyperlink on the Home Page).

USER INFORMATION TAB

User Information ▾

Logon List

Company

Title

Phone

Fax

Mobile

Mobile Provider

Email

Address 1

Address 2

DocuSign UserName

DocuSign Password

DocuSign Key

City

State/Prov

Zip/Postal Code

Country

Phone Number Hyperlink Provider

UPDATE CANCEL

Company – name of the company the user works for.

Title – user’s business title

Phone – user’s primary phone number

Fax – user’s fax number

Mobile – user’s mobile number

Mobile Provider – user’s mobile provider

Email – user’s email address. This the email address that the application will use if the user has Email Notification or Express Mail activated.

Address 1 – first line of the address of the user.

Address 2 – second line of the address of the user.

City – user’s city.

State – user’s state.

Zip – user’s zip.

Country – provision for entering country of user.

Phone Hyperlink Provider – user’s phone hyperlink provider for click to call.

Docusign Username – username for docusign integration if enabled at the Workgroup level the user has access to

Docusign Password – password for docusign integration if enabled at the Workgroup level the user has access to

Docusign Key – Docusign Key for docusign integration if enabled at the Workgroup level the user has access to

TIME AND DATE TAB

Time And Date ▾

[Change Password](#)

Date Format

mm/dd/yyyy ▾

Time Zone

(GMT -05:00) Eastern Time (US & Canada) ▾

Date Format – determines whether month or day shows first.

Time Zone – is used by the application to establish the correct user date/time [this is used in many functions with the application including date/time stamping as for displaying the correct date/time in the Call Back/Events function] – the Adjust for daylight savings time add an additional hour during the standard daylight savings time period.

CALENDAR AND CALLBACKS TAB

Calendar Before/After Hours to

Default Calendar View

Default Calendar

Reminder

Group Calendar Display ☒ All group list names ☐ Only group list names with assigned appts & tasks

Appts & Tasks home page link ☒

Filter Appts & Tasks ☐ View only appts & tasks set for me ☒ View appts & tasks for all companys

Prompt to send email notification for added or updated ☒

Default Number of User on Group Calendar

To sync with Google Calendar, enter your Google credentials.

Google Calendar Email Authenticated

Completed tasks/appts remain on the calendar ☒

Display Activity Notes in the Modern Calendar onhover of event ☒

Days to sync in the future

Days to sync in the past

Calendar Before/After Hours – is a special parameter that pertains to a special function within the application for certain users who measure response times for support type activities.

Default Calendar View – select from Horizontal, Vertical or List calendar view.

Default Calendar – select from Day, Week or Month calendar view.

Appts & Tasks homepage link – whether you wish to have a Callbacks / events link on your home page

Filter Appts & Tasks – whether you can view all Callbacks / events for all the records you have access to or just the ones assigned to you or you have created.

Prompt to Send Email Notification for Added or Updated – whether you want the system to send an email notification for any Calendar or Callbacks added or updated.

Default Number of Users on Group Calendar – select how many number of users you want displayed in the Group Calendar view.

Google Calendar Email - Google sync information IF you are set up to use Google Sync.

Completed tasks/appts remain on the calendar – choose whether you want completed tasks/events displayed in the calendar.

Display Activity Notes in the Modern Calendar onhover of event – choose whether to enable preview of activity notes in the Modern Calendar view on mouse hover.

Days to sync in the future – Select the number of days in the future you want your Google Calendar to sync with LeadMaster Calendar.

Days to sync in the past – Select the number of days in the past you want your Google Calendar to sync with LeadMaster Calendar.

EMAIL SIGNATURES TAB

On this tab you will be able to set up your primary email signature to be used when sending out emails from within the applications. Once you have a primary signature set up you will then be able to set up additional signatures, allowing you a wide range of signatures to use when sending out emails from the application.

[Change Password](#)

"Include signature (from User Settings)" checked ☐

Email Signature Name	Email Address	
Primary Email Signature	joanna.hernandez@leadmaster.com	edit
test	joanna.hernandez@leadmaster.com	edit delete

Autoreponder (Out of Office) This feature is only active when sending records.

☐ Enable Autoreponder (Turn on feature that auto-replies when you receive an email)

Starting: --Select--

Ending: --Select--

Auto-reply with the following message:

"Include signature (from User Settings)" – check this option if you want to use your configured email signature in your outgoing emails.

Add/Edit Email Signature - In order to create a new or edit an existing email signature you will either click the "Add" button (for new signatures) or the "edit" link (for existing signatures). You may also delete an existing signature if you no longer need it.

When you Add or Edit a signature you will be taken to the email editor within the application where you will make your changes. The editor is an html editor and while it does look similar to creating a word document it is html based and therefore does follow html guidelines. For those that are familiar with html you do have the ability to click on the <HTML> icon and be taken to the actual html code where changes to the actual code can be made.

Here's how you can have a multiple line signature and logo in your email signature:

- 1.) Create a two-column table in the applications signature editor
- 2.) Place your image in the left-hand column
- 3.) Split the right-hand column into an appropriate number of rows so as to space the lines of your signature as you desire

Autoresponder (Out of Office) – allows users to enable or disable the auto-responder feature.

SMS CONFIGURATION TAB

Personal SMS Twilio Configuration

Default Configuration ☒ Personal ☐ Company

Twilio Account Sid	<input type="text"/>	
Twilio Authorization Token	<input type="text"/>	
Twilio Phone	<input type="text"/>	
Number of Retries	<input type="text" value="3"/>	
Retry delay (in Seconds)	<input type="text" value="5"/>	
SMS Limit	<input type="text" value="10000"/>	(0 = Unlimited)
SMS Page Refresh Rate	<input type="text" value="5"/>	in Seconds
No. of Contacts	<input type="text" value="10"/>	
No. of Conversations	<input type="text" value="50"/>	
Notification Duration	<input type="text" value="10"/>	in Seconds

This tab is visible when the provision to send SMS is enabled from the Workgroup Management page. Twilio details will be provided by your Administrator or LeadMaster Consultant.

OTHER SETTINGS TAB

Banner

Default Tab on Home Page ☒ Info Center ☐ Personal - Activity Hub ☐ Help Tickets ☐ Global

Default Page Clicking on the 'Company' hyperlink from search results, accounts and reports takes you to:

☐ View Record ☒ Record View ☐ Edit View ☐ Custom View

Contact to Company ☐ ☒

Display Checkbox to Add Notes ☒ Show Preview Pages ☒

Message Ticker ☒ Show Left Menu ☒

Left Menu Options

Add Me to Bcc ☒

Display New Company ☐

Outlook Sync If a contact is not matched with an existing record during sync:

☐ Automatically create a new record with new contact as primary

☒ Save contact to the Filing Cabinet

Currency Display currency values in the following currency:

Workgroup ID

Lagon ID

REST API Token

Default Tab on Homepage – choose which page you want displayed on your homepage.

Default Page - Select where you want to be taken to when clicking on the 'Company' hyperlink from search results, accounts and reports.

Contact to Company - If option is not checked, clicking on contact name will take you to the company page. If this option is checked, it will take you to the company page if there is only one contact for given company. Otherwise, it will open the particular contact.

Display Checkbox to Add notes – determines whether to show this option when adding callbacks, doing mass updates etc.

Show Preview pages - determines whether a pop-up appears when you mouse over a contact or company.

Message Ticker - determines whether or not the user sees the scrolling ticker on the top banner. The message ticker can be configured in the Automation and Workflow Management tool.

Show Left Menu – when checked, left panel is displayed.

Left Menu Options – sections available to display in left menu

Add Me to BCC – when checked, user's email address will automatically be added to the BCC field when sending email messages.

Display New Company – when checked, this option will be displayed when adding a new Record.

Outlook Sync – Select how outlook contact sync should work if not matched with an existing record/company.

Currency – Select individual user's currency to use





Workgroup ID – Company or Workgroup's unique ID

Logon ID – user's unique logon ID

Rest API Token – Generate your individual API Token

COMPANY HIERARCHY / ASSIGNMENTS

The application has four levels of lead assignment:

-  Organization/Group
-  Account Manager
-  Partner
-  Partner Rep

For internal purposes you can setup a two-level hierarchy by assigning an Account Manager to a particular Group/Organization such as a district, region or division. An Account Manager must belong to a Group/Organization and assignment is at the Account Manager level only.

For external purposes (or for an alternative internal purpose a you can setup a two-level hierarchy by assigning Partner Rep to a particular Partner. Partner Reps must belong to a Partner and assignment is at the Partner Rep level only.

User access at these assigned levels is controlled by the relationship of these tables to the user's logon privileges.

ORGANIZATION/GROUP ASSIGNMENT TABLES

An Organization needs to be set up before creating and assigning Account Managers.

Users with User Type = Group and added from [Add a User page](#) are automatically added to the Hierarchy List.

Add Group
Acct. Rep. List
Referral Partner List
Partner Rep List

Group List

Help Guide

Group Information

☒ Group

First Name

Last Name

Title

Has Logon ☐ No

Has Case Assignment ☐

Phone

Fax

Mobile

Mobile Provider -- Select --

Email

Send Email to Group ☐ Yes ☒ No

ID

Quota

Fiscal Year

Period	Start Date	End Date	Quota
2019	1/1/2019 12:00 AM	12/31/2019 12:00 AM	<input type="text" value="\$0.00"/>

Mailing Address

Address 1

Address 2

City State Zip

Country -- Select --

Shipping Address

Same as Mailing ☒

Address 1

Address 2

City State Zip

Country -- Select --

If a user logon is restricted to the Organization assignment level, then that logon must be set up as Organization/Group User Type logon and the first name and last name on that logon must exactly match the information on the Organization page.

ACCOUNT MANAGER ASSIGNMENT TABLES

The Administer Account/Account Manager function is where you set up an Account Manager associated with a particular Organization/Group. This can be reached via the Administration page > View/Edit Acct. Rep.

Group List

Acct. Rep. List

Referral Partner List

Partner Rep List

Add Acct. Rep.

Import

Help Guide

Workgroup: AB - Jo 5

(Alt) ABCDEFGHIJKLMNOPQRSTUVWXYZ

Acct. Rep. Last Name:

Rows to Display: 15

ID	Group	Acct. Rep.	Email	Title	Has Logon	LX	CRM-Xpress	Available for Assignment	Send Email to Acct. Rep.	City	State	Zip
<input type="checkbox"/> 2178	LM	AB-Jo 5 Admin	joleadmaster5@gmail.com		No	No	Yes	Yes	No			
<input type="checkbox"/> 2497	LM	Rep5 Hernandez	jprh0@aol.com	Test Title	Yes	No	No	Yes	No	test	GA	30006
<input type="checkbox"/> 2179	LM	Jo Hernandez3	joleadmaster3@gmail.com		No	Yes	No	Yes	No			

Delete

Page Results: 1 of 1

Delete

Page Results: 1 of 1

New Account Managers can be added via the Add Account Manager or Import options. Existing Account Managers can be edited or deleted via clicking on the edit hyperlink on the right-hand side of the page, which will take you to the Account Manager Maintenance page.

The Account Manager edit page contains data that can be collected about an Account Manager for user "informational" purposes. The Account Manager first name and last name are required fields.

An Account Manager needs to be "linked" to an Organization/Group via Organization/Group field pull-down table.

Organizations/Groups need to be set up before creating associated Account Managers.

Group List	Edit Acct. Rep.	Referral Partner List	Partner Rep List			
Acct. Rep. List Help Guide						
Acct. Rep. Information						
<div> <div> <div>✓ Group</div> <div>LM</div> </div> <div> <div>✓ First Name</div> <div>Rep5</div> </div> <div> <div>✓ Last Name</div> <div>Hernandez</div> </div> <div> <div>Title</div> <div>Test Title</div> </div> <div> <div>Has Logon</div> <div>Yes</div> </div> <div> <div>CRM-Xpress</div> <div> <input type="radio"/> Yes <input checked="" type="radio"/> No </div> </div> </div>						
<div> <div>Phone</div> <div>9293565063</div> </div> <div> <div>Fax</div> <div>9293565063</div> </div> <div> <div>Mobile</div> <div>9293565063</div> </div> <div> <div>Mobile Provider</div> <div>-- Select --</div> </div> <div> <div>✓ Email</div> <div>jprh0@aol.com</div> </div> <div> <div>Send Email to Acct. Rep.</div> <div> <input type="radio"/> Yes <input checked="" type="radio"/> No </div> </div> <div> <div>Available for Assignment</div> <div> <input checked="" type="radio"/> Yes <input type="radio"/> No </div> </div> <div> <div>ID</div> <div></div> </div>						

Until this page indicates 'Has Logon' equals 'Yes' this user will not be able to see assigned Records.

If a user logon is restricted to the Account Manager assignment level then that logon must be set up as an Account Manager level logon and the first name and last name on that logon must exactly match the first name and last name of the Account Manager page.

PARTNER ASSIGNMENT TABLES

The Partner function is where you set up a Partner company and contact. This can be reached via the Administration page > View/Edit Partner.

The screenshot shows the 'Referral Partner List' tab selected. At the top, there are navigation tabs: 'Group List', 'Acct. Rep. List', 'Referral Partner List' (active), and 'Partner Rep List'. Below these are buttons for 'Add Referral Partner', 'Import', and 'Help Guide'. A search bar shows 'Workgroup: AB - Jo 5' and a filter '[All] ABCDEFGHIJKLMNOPQRSTUVWXYZ'. A table lists referral partners with columns: ID, Referral Partner Name, Contact, Email, City, State, and Phone. One entry is visible: ID 1026, Jo 5 Partner. A 'Delete' link is present below the table. On the right, there are fields for 'Referral Partner Last Name', 'Rows to Display' (set to 15), and 'Page Results' (1 of 1).

New Partners can be added via the Add Partner or Import options. Existing Partners can be edited or deleted via clicking on the edit hyperlink on the right-hand side of the page, which will take you to the Partners maintenance page.

The screenshot shows the 'Edit Referral Partner' page. At the top, navigation tabs include 'Group List', 'Acct. Rep. List', 'Edit Referral Partner' (active), and 'Partner Rep List'. Below are buttons for 'Referral Partner List' and 'Help Guide'. The form is divided into two main sections: 'Company Information' and 'Contact Information'.
Company Information: Includes a checked 'Referral Partner' checkbox, a text field for 'Jo 5 Partner', and fields for 'Phone', 'Fax', 'Toll Free', and 'Specialty'. To the right, there are fields for 'Partner Type', 'Email', 'Send Email to Referral Partner' (radio buttons for Yes/No, with 'No' selected), 'Web Address', and 'Logo File'.
Contact Information: Divided into 'Primary Contact' and 'Secondary Contact'.
Primary Contact: Fields for First Name, Last Name, Title, Phone, Fax, Mobile, Mobile Provider (dropdown), Email, and ID. A 'Has Logon' checkbox is at the bottom left.
Secondary Contact: Fields for First Name, Last Name, Title, Phone, Fax, Mobile, and Email. A 'Has Case Assignment' checkbox is at the bottom right.

The Partner edit page contains data that can be collected about a Partner for user "informational" purposes. The Company field is the only required field. A Partner needs to be set up before creating and assigning Partner Reps.

If a user logon is restricted to the Partner assignment level then that logon must be set up as a Partner user type logon and the first name and last name on that logon must exactly match the first name and last name of the Primary Contact on the Partner page.

PARTNER REP ASSIGNMENT TABLES

The Partner Rep function is where you set up a Partner Rep associated with a particular Partner. This can be reached via the Administration page > View/Edit Partner Rep. The following is the detail on the Partner Rep page:

The screenshot shows the 'Partner Rep List' tab selected. At the top, there are tabs for 'Group List', 'Acct. Rep. List', 'Referral Partner List', and 'Partner Rep List'. Below these are buttons for 'Add Partner Rep', 'Import', and 'Help Guide'. The main area displays a table with columns: ID, Referral Partner Name, Partner Rep Name, Email, Has Logon, LX, CRM-Xpress, Available for Assignment, Send Email to Partner Rep, City, State, Territory, and Phone. A single record is shown with ID 2567, Referral Partner Name 'Jo 5 Partner', Partner Rep Name 'Noor Medlej', and 'Available for Assignment' set to 'Yes'. Below the table, there is a 'Delete' link and a 'Page Results' indicator showing 1 of 1 results.

New Partner Reps can be added via the Add Partner Rep or Import options. Existing Partner Reps can be edited or deleted via clicking on the edit hyperlink on the right-hand side of the page, which will take you to the Partner Reps maintenance page.

The Partner Rep edit page contains data that can be collected about a Partner Rep for user "informational" purposes. The Partner Rep first name and last name are required fields. A Partner Rep needs to be "linked" to a Partner via the Company field pull-down table. Partners need to be set up before creating associated Partner Reps.

The screenshot shows the 'Edit Partner Rep' form. It has tabs for 'Group List', 'Acct. Rep. List', 'Referral Partner List', and 'Edit Partner Rep'. Below these are buttons for 'Partner Rep List' and 'Help Guide'. The form is divided into several sections:

- Contact Information:** Includes fields for First Name (Noor), Last Name (Medlej), Title, Referral Partner (Jo 5 Partner), Territory, Has Logon (No), CRM-Xpress (No), Lead-Express (No), Date Format (mm/dd/yyyy), Phone, Fax, Mobile/Cell, Mobile Provider (dropdown), Email, Send Email to Partner Rep (Yes/No), Available for Assignment (Yes/No), ID, and Lead Assignment Notification Email (Yes/No).
- Quota:** Includes Fiscal Year (2019), Period (2019), Start Date (1/1/2019 12:00 AM), End Date (12/31/2019 12:00 AM), and Quota (\$0.00).
- Mailing Information:** Includes Mail To, City, State, Zip/Postal, Country, and Ship To (Same as Mailing), City, State, Zip/Postal, Country.
- Primary Email Signature:** A section for email signature.

 At the bottom, there is a menu bar with options: File, Edit, Insert, View, Format, Table, and Tools.







Until this page indicates 'Has Logon' equals 'Yes' this user will not be able to see assigned Records.

If a user logon is restricted to the Partner Rep assignment level then that logon must be set up as a Partner Rep user type logon and the first name and last name on that logon must exactly match the first name and last name of the Partner Rep page.

WORKGROUP MANAGEMENT

The Workgroup Management function allows the Administrator to enable different functions for each of the WorkGroups they have access to.

Workgroup List

<div> <div>Upload Company Logo</div> <div>Add Workgroup</div> <div>Help Guide</div> </div>										
<div> <div>Database</div> <div>LRP61 - AB</div> </div>		Change Description								
ID	Workgroup	Database	Active	Status	Email	Calendar	Track Downloads	Opportunities	API Key	Rows to Display: 25
27871	AB - Demonstrations (Mail Channels) - Classic	LRP61 - AB	Active	Production	Enabled	My Calendar and Group Calendar	Yes	Yes	ak26771820103190595627311512498431	
9512	AB - Demonstration? (Jango Mail)	LRP61 - AB	Active	Production	Enabled	My Calendar and Group Calendar	Yes	Yes	ak951214417619194845471462222048	
18772	AB - Eljje	LRP61 - AB	Active	Production	Enabled	My Calendar and Group Calendar	Yes	Yes	ak187722516778404979715241073461	
27047	AB - Entry Level LeadMaster	LRP61 - AB	Active	Production	Disabled	My Calendar and Group Calendar	Yes	Yes	ak27047617307039228439151910450828	
7197	AB - Janice	LRP61 - AB	Active	Sandbox	Enabled	My Calendar and Group Calendar	Yes	Yes	ak71976617382706737523456222042	
19394	AB - Jo	LRP61 - AB	Active	Sandbox	Enabled	My Calendar Only	Yes	Yes	ak1939480022340250968991410450848	

To add a WorkGroup click the [Add WorkGroup](#) button.

Clicking on the edit hyperlink for any of the WorkGroups the Administrator is authorized to see (based on their Logon privileges) will display all of the WorkGroup settings that can be set for all user of a WorkGroup.

The settings at the WorkGroup level apply to all users of that WorkGroup.

WORKGROUP OPTIONS AND SETTINGS

DATABASE, WORKGROUP, BANNER, COLOR SECTION

Date Created

4/18/2019 5:00 PM

Last Updated

9/8/2020 4:56 AM - Joanna Hernandez

▼ Database, Workgroup, Banner, Color

Database

Workgroup Name

Active Status

Status

Group - Consultant

Partner - Partner

Display Style

Skin / Custom Stylesheet

Default Label Set

Banner Skin

Banner Logo

Banner Statement Text

Banner Statement Face\Size\Color

Banner Statement Background

Banner Background

Search/Login Button

Section Font Color

Section Background Color

Section Font Face/Size

Locale

Top Banner Menu Style

Quick Tour

LRP61 - AB - 216

AB - Jo 5

Active

Sandbox

None

None

APP4

LM Refresh (old)

Theme279.css

AB - Jo 5 Label Set2

Default Skin

LeadMaster logo.jpg

AB - Jo 5

Georgia

3

White

color palette

White

color palette

Blue

Custom

808080

color palette

CCCCCC

color palette

Georgia

3

English - United States

Locale controls currency formatting.

Text Only(Default)

Enabled

Database – database where the workgroup being configured is located.

Workgroup Name – name of the Workgroup

Active Status – current status of the Workgroup

Status – type of the Workgroup being configured

Skin / Custom Stylesheet – custom css template applied to the WG if there's any
Default Label Set - The "Default Label Set" can be set for a workgroup. It will apply to all users logging into this workgroup with the following exception:

- ✚ The "Internal Settings" for a specific user having access to this workgroup (see "Logon Management / Internal Settings") allows you to specify a default label set to use when that user logs into this workgroup.
- ✚ If "Not set" is selected for the default label set for this workgroup, the default label set specified for a user (see "Logon Management") determines the label set to use when that user logs into this workgroup.

Banner Logo - This is the logo that appears in the banner on each screen - pull-down values [logo must be uploaded by support]

Banner Statement Text - This is the banner text that appears just below the banner line on each screen

Banner Statement Face\Size\Color – Banner statement font type, size and color

Banner Statement Background – Banner statement background

Banner Background – background color for banner

Search/Login Button - Color of Search/Login button

Section Font Color - Font color of the section headers [such as Contacts, Profile Summary, Attached Files, etc.]

Section Background Color - Background color of the section headers

Section Font Face/Size – Font type and size of the section header




Locale – Controls the currency formatting.

Top Banner Menu Style - setting for the top menu display

Quick Tour – setting for the quick tour feature upon user logon

EMAIL AND LEAD NURTURING

♥ Email & Lead Nurturing

HTML Email	Enabled ▼
Record Email Logging	Enabled ▼
Email Multiple Recordss	Enabled ▼
Email	Enabled ▼
Lead Nurturing	Enabled ▼
Use Email Campaign "From Address" As From Address When Sending Email Messages	Disabled ▼
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 ▼
CRM-Express Number Of Records	0
Require Lead-Xpress Password	Disabled ▼
Lead Nurturing Execution Time	3:00 PM ▼
Email Opportunity / Deals to Reps	Disabled ▼
Show Address Book	Enabled ▼ 
Attach Details When Emailing Record	Enabled ▼ 
Enforce GDPR	Disabled ▼ 
Opt-Out Domains	Select

HTML Email – enables the HTML option in Email Editors

Record Email Logging – controls whether emails are logged at the Record/Contact level. This turns on the Email History feature in the Contact detail screen.

Email Multiple Records – allow sending of emails to multiple Records/Contacts

Email - This is an overall switch to allow and enable Daily and Express email at the workgroup level (this parameter must be set to Enable for individual users to have Daily or Express Email)

Lead Nurturing – enables the Lead Nurturing feature

Use Email Campaign "From Address" As From Address When Sending Email Marketing Messages – allows the choice of either:

1. having the email sent from CRMTool.net or
2. user's email address

Send Email Messages – choose whether to send emails from user as sender or leadmaster on behalf of sender

Number of email messages allowed: applies to bulk and individual email messages sent for the Workgroup

Per Month – total number of bulk and individual email messages that can be sent out in a month

Per Day – total number of bulk and individual email messages that can be sent out per day

Per Search – total number of bulk and individual email messages that can be sent out from Search Results

Allow Updates To Records Via Email – enables Lead Xpress

CRM-Express Number Of Records – allocated limit of Records

Require Lead-Xpress Password – enables password for Lead Xpress users

Lead Nurturing Execution Time – specific time for Lead Nurturing steps to execute

Email Opportunity / Deals to Reps – enables the option to print/email opportunities to reps


Show Address Book – shows the address book when sending Records, opps, cases to reps/users of the Workgroup.

Attach Details When Emailing Record – 'When enabled an HTML file containing the contents of the Record View page will be included with the email. If disabled the file will not be included with the email.

Enforce GDPR – When Enforce GDPR is enabled, only email addressed that have selected opt-in on the email preferences page will receive email. LeadMaster will keep track of this by email address, so that even if there are duplicate copies of the contact email address, the selection for any one email address will be enforced for all contacts with that email address.

Opt-Out Domains – List of restricted domains.

SMS


 SMS

SMS Text Message Configuration


Twilio
Manage

Number of SMS allowed:

Per Month

1000


Per Day

100



SMS Text Message Configuration – enable or disable SMS feature

Number of SMS allowed:


Per Month – set the monthly limit of SMS that can be sent out for the Workgroup

Per Day - set the daily limit of SMS that can be sent out for the Workgroup


MOBILE, QUOTES, CASES, MORTGAGE POS

 Mobile, Quotes, Cases, Mortgage POS


Mobile Access

Enabled



Access To Case Management

Enabled

** Access to case management automatically have case management reports.*


Case Assignment Access To

Default



Access To Quotes

Enabled


Change Case Status When Closed

Enabled


Mortgage POS



Mobile Access – allows access to the Workgroup using mobile apps

Access to Case Management – enables the Case page, Case section on Record pages, Case management Reports, Case-related search functions.


Case Assignment Access to – configure if case assignment is linked to hierarchy level or individual user level.

Access to Quotes – enables the Quotes features

Change Case Status When Closed – 'When "Change Case Status When Closed" is enabled the Case Status drop down field will automatically change to Closed. The value in the Case Status reference table should be either Closed, CLOSED or closed.

Mortgage POS – enables the Mortgage POS functionality

TIMESTAMPS

 **Timestamps**

Timestamp Assignments	Enabled ▼
Timestamp Campaigns	Enabled ▼
Timestamp Multiple Record Updates	Enabled ▼

Timestamp Assignments – This creates a Date/Timestamp message in the Sales Rep Comments field every time a record is assigned or reassigned.

Timestamp Campaigns – This creates a Date/Timestamp message in the Sales Rep Comments field every time the campaign is changed for a record

Timestamp Multiple Record Updates - This creates a Date/Timestamp message in the Sales Rep Comments field every time bulk/mass update of Records are done.

SECURITY OPTIONS

Security Options

Required Logon URL

Redirect to URL

☒ Yes
☐ No

Restricted IPs

None

Allow Restricted IPs

☐ Yes
☒ No

Supported Browsers

☒ All
☐ Microsoft Edge
☐ MSIE 11.0
☐ MSIE 10.0
☐ MSIE 9.0
☐ MSIE 8.0
☐ MSIE 7.0
☐ MSIE 6.1
☐ MSIE 6.0
☐ MSIE 5.0
☐ Mozilla Firefox
☐ Chrome
☐ Safari
☐ Netscape

Supported Browsers Enforced After

Required Logon URL – Ability to define a custom URL for access to this workgroup

Redirect to URL – Ability to redirect access via the standard URL to the required URL (if set to Yes, the user will be redirected to log in via the required UR, if set to No the user will be told that their username/password is not valid)


Restricted Ips – Ability to restrict access to application only from determined IPs or ranges of IPs


Allow restricted Ips – Activates the Restricted IPs function

Supported Browsers –

Supported Browsers Enforced After –

AUTOMATION, CALENDAR, CHARTS, PHONE

 Automation, Calendar, Charts, Phone

Access To Automation and Workflow Management	Enabled	▼
Workflow Fires on File Upload	Disabled	▼
Calendar	My Calendar and Gro	▼
Phone Number Hyperlink	Enabled	▼
Phone Number Hyperlink Provider		▼
Show Calendar Event Background	Enabled	▼
Calendar Style	Modern Calendar	▼
Sales-Xtreme	Enabled	▼ 

Access to Automation and Workflow – enables the automation and workflow functionality for the Workgroup. This provides a menu in the Administration section allowing access to the automation and workflow management tools of the system. These tools are easy to use and don't require knowledge of programming. For example, if you wanted to setup and autoresponder you could use these tools to say anytime a new record comes into the system and the campaign is = XYZ send a particular email.

Workflow Fires on File Upload – enable workflow to fire whenever files are uploaded at the Record level.

Calendar – This determines how / if the Calendar will be available – can be set to no Calendar, Basic Calendar, My Calendar or both My Calendar and Group Calendar

Phone Number Hyperlink – turns phone numbers into Hyperlinks for use with various Power Dialers. Click on the phone number and it will dial the phone number through the provider chosen in the 'Phone Number Hyperlink Provider'.

Phone Number Hyperlink Provider – these are companies that have integrated their dialing solutions with the application. You will need either a software product from that company or logon credentials from that company to be able to use this feature.

Calendar Style – This controls the calendar style to display - Modern or Classic calendar

Sales-Xtreme - When enabled it provides the option of accessing Sales-Xtreme through a productivity shortcut or a weblink. To enable the weblink use {!ST} If disabled neither the productivity shortcut nor the weblink are visible.

OPPORTUNITIES

Opportunity / Deal Discounting	Enabled	▼	
Opportunity / Deal Product Recurring Revenue	Enabled	▼	
Opportunity / Deal Not In Stock Capability	No	▼	?
Displays the Product Description Field	No	▼	?
Display Opportunity / Deal ID	Enabled	▼	
Solution Pricing	Read Write	▼	
Track Opportunity / Deal	Enabled	▼	?

Deal Discounting – Adds the ability to discount by percent in the Opportunity function (discounts are controlled by the Opportunity Discount table in Manage Reference Tables)

Deal Product Recurring Revenue – Allows for the ability to set up Recurring Revenue by individual product line

Deal not In Stock Capability – Allows users to set up a product line with a no predefined product by filling in the Product Description and/or Product Code and manual entering the Price

Display the Product Description Field – when enabled, the product description is displayed on the Opportunity page

Display Deal ID – Display an internal Opportunity ID (unique sequential number created by the application) that displays in the Sales Opportunity section of the detail screen

Product Pricing – Display the product description field

Track Deal – This controls the Opportunity function.

TRACKING, AGING, AUDIT, LOGGING

Track Downloads	Enabled ▼	
Lead Status Aging	Enabled ▼	Number of Days: 0
	<input type="checkbox"/> Display Lead Status Chart Icon	
Sales Stage Aging	Disabled ▼	Number of Days: 0
	<input type="checkbox"/> Display Sales Stage Chart Icon	
Audit Fields	Check field(s) below to begin auditing.	
	<input type="checkbox"/> Lead Status	
	<input type="checkbox"/> Sales Stage	
Call Center Stats	Enabled ▼	<input type="checkbox"/> Mandatory Update <input checked="" type="checkbox"/> Add to Comments
	<small>* Call center stats automatically have productivity reports / statistics.</small>	
Record Quick Actions II	Enabled ▼	<input type="checkbox"/> Mandatory Update <input checked="" type="checkbox"/> Add to Comment
Record Take Action III	Enabled ▼	<input type="checkbox"/> Mandatory Update <input checked="" type="checkbox"/> Add to Comment
Access To Call Tracking	Enabled ▼	
Record Activity Logs	Enabled ▼	
Activity Log Storage Duration	30 days ▼	
Activity Log Archive Storage Duration	6 months ▼	
Show DocuSign	Enabled ▼	

Track Downloads - This creates an audit trail record that records who and what was downloaded (audit trail is only available to application support personnel and is kept for 90 days).

Lead Status Aging – If Enabled, then any change to the Lead Status field will have a date/time-stamp in the Sales Rep Comments field. In addition, for any Lead Status values that have Tracking set in the Lead Status Reference table, if the Lead Status does not change within "X" number of days as set in the Lead Status Aging – Number of Days field in this parameter - an auto email notification will be sent to the Account Manager listed on the record. For example, the email might remind them to update the status of their lead.

Sales Stage Aging – Tells you how long the records have been sitting in their current stage. This is useful for analyzing the sales cycle. See the sales stage aging report. You'll need to turn on tracking in the reference tables in order to track it.

Audit Fields - This function turns the Lead Status Aging or Sales Stage Aging ON/OFF. If ON, then the number of days before sending an automatic email to the Account Manager can be set.

Call Center Stats – Call Stats feature displays up to 18 user definable field tags (tags can be viewed and changed via the Current Label Set> Label Group: Call Center Stats) – if Custom Label is blank then that Call Stat will not appear. Updating one of the call stats fields by the user can be made mandatory by clicking 'Mandatory Update'. If 'Add to Comment' is checked then any call stats field that is checked is recorded in the Sales Rep Comments section. Defining the call stats actions can be accessed via the Customize Pages and clicking on 'Define Call Results Click Actions'.

Record Quick Actions II – enables the Quick Actions II fields

Record Quick Actions III – enables the Quick Actions III fields

Access to Call Tracking - Tracks information about calls - similar to opportunity. This is a customer specific implementation and requires programming from the development team. You'll need to turn on tracking in the reference tables in order to track it



Record Activity Logs – turns on or off the Activity Hub and Activity Stream

Activity Log Storage Duration – storage duration option for the activity logs

Activity Log Archive Storage Duration – storage duration option for the activity logs

Show DocuSign – turns on or off the DocuSign functionality in the Workgroup

RECORD CONTROLS

Account Snapshot Header	Fluid	▼
Record Update Default	Enabled	▼
Smart Queue Next Lead Button	Update Record and Get Next Lead	▼
Contact Name Hyperlink	Enabled	▼
Account Hyperlink	Enabled	▼ 
Clone Multiple Records	Disabled	▼
Clone Contact to New Record	Enabled	▼ 
Lock Records	Disabled	▼
Unlock After	5 minutes	▼
Duplicate Company	Enabled	▼
Check when Adding Records	25	▼
Default Rows to Display		

Account Snapshot Header – Controls what is displayed on the Record snapshot header

Record Update Default – This workgroup setting overwrites the User Account's default page settings and always takes displays the Sales Update / Record Update page when the Workgroup's Record Update is set to "Enabled" and the user clicks on either the contact or the company - unless they have 'Contact to Record' selected as default Record page in User settings.

Smart Queue Next Lead Button – Controls the function of Next Lead button in Smart Queue

Contact Name Hyperlink – Determines whether Contact Name hyperlink appears in the Search Results screen

Clone Multiple Records – This allows for the cloning of multiple leads via the Search Results screen (default is only single lead clone via the individual lead detail screens)

Lock Records – Enables the record locking feature. When multiple users have access to a set of records, the record locking feature allows the users access to the information without the risk of overriding another user's work. If one user has opened a record and another wants to access that same record, the system will provide a limited view of the record with a "Record is currently locked" warning tells the user that another person is working with that record.

This is a great way for a group of users, like an inside sales team, to work on a set of records without having to assign them to individual users.

Unlock After – duration setting to unlock a "locked Record"

Duplicate Company Check When Adding Records – When enabled, it will alert user if Company name already exists when adding new Record.

The screenshot shows the 'Add New Record' form in the LeadMaster CRM. At the top, the user is logged in as 'AB - Jo Hernandez' on 'Tuesday - 10/6/2020 7:22 AM EDT'. The navigation bar includes links for Home, Accounts, Contacts, Deals, Reports, Library, Add Records & Leads, Campaigns, Calendar, and Admin. The form itself has a 'Clear Form' button and a 'Check For Match' button. A red-bordered box highlights a message: 'Company Already exists. Please use the "Check For Match" menu to see the existing Company.' Below this, the 'Options' section includes a 'Campaign' dropdown (set to '- Select -') and checkboxes for 'Add a(n) call back/event', 'Add more contacts', 'Add a(n) deal', and 'Display the new record' (which is checked). The 'Primary Contact Information' section includes a note: 'A ★ indicates a required field. Highlighting denotes fields that are used to check for matches.' The form fields are organized into two columns. The left column contains 'Parent Company' (with a dropdown icon), 'Company' (with the value 'Test'), 'Prefix', and 'First Name'. The right column contains 'City', 'State' (with a dropdown), 'Zip', 'Web Address', 'Company Revenue', 'Employee Size', 'Unique ID', and 'Ultimate Duns'.

Default Rows to Display – Controls the number of rows on Records and Search Results list pages.

PASSWORD RULES

Enforce Password Rules	Disabled ▼
Minimum # of Characters In Password	7 ▼
Requires Upper and Lower Case Characters	Disabled ▼
Requires a Number	Disabled ▼
Requires a Special Character (!@#\$%^&*()_+)	Disabled ▼
Password Expires in days	0 - Never ▼
Logon Attempts - # of Retries Before Lockout	0 - Never ▼
Track Previous Passwords	Enabled ▼
Number of Previous Passwords to Save	0 ▼
Case-Sensitive Password Matching on Logon	Disabled ▼

Enforce Password Rules – controls password rules implementation

Minimum # of Characters in password – A minimum # of characters in the password from 1 to 20 can be required

Requires upper- and lower-case characters – Upper & Lower Case can be required.

Requires a number - A number can be required.

Requires a special character – A special character (!@#\$%^&*_+) can be required.

Password Expires in days – A new password can be required anywhere between 1 and 365 days.

Logon Attempts - # of Retries Before Lockout - The user can be locked out after anywhere from 1 to 20 unsuccessful login attempts.

Number of Previous Passwords to Save - The user can be prevented from using previous password and the system will remember anywhere from 1 to 20 of the previous passwords used.

Case-Sensitive Password Matching on Logon - correct input of uppercase and lowercase characters can be required.

HIERARCHY OPTIONS

Link Acct Mgr/Rep	Disabled	▼	
Team Selling	Disabled	▼	🔒
Display Group/Partner - None	Enabled	▼	
Round Robin Assignments	Standard	▼	🔒

Team Selling – controls whether to allow multiple Account Managers and/or Partner Reps to access records.

Display Group/Partner None – controls whether to display the option in the assignment dropdown list.

Round Robin Assignments – Round Robin settings whether Standard or Advanced.

Standard is a single round robin queue with lead assignments starting at the top of the list and working down. If there is a default assignee then the lead assignment starts with that rep. If you've set the requirement for a user to be logged in to get a lead and no one is logged in it will go to the default assignee.

The Advanced Round robin queue allows weighting of the queue by adding the same rep to the queue multiple times. It also has the ability to reset the starting point of the queue and handy reorganization tools. You'll also see the rep that is next in line for a lead assignment.

If you are using the Task Manager to reassign leads that aren't claimed there is a separate table in the database that tracks reassignments. Using the same list of reps as the round robin queue, reassignments start at the top of the list and work down one-by-one.

MANAGE TASKS AND APPOINTMENTS


Event Logging for appt / call back	Enabled	▼	
Add address 1 and phone to new appt / call back	Enabled	▼	🔒
View All address 1 Records	Disabled	▼	

Event Logging for Appointment / Callback – This creates a Date/Timestamp message in the Sales Rep Comments field whenever the Event/Callback is added or changed

Add Address 1 and Phone to new Appointments and Callbacks – auto-populates the Address and Phone Number of the Record/Contact when creating new appointments/callbacks.

View all Address 1 Records -

OTHER

Mapping URL	www.mapquest.com ▼
Fiscal Year End	December ▼
Quota Periods	Yearly ▼
Maximum Upload File Size Options	5 MB ▼
Import Send Single Record Email Notifications	Disabled ▼
Import Max Records for Sending Single Record Email Notifications	0
Accounting Software	None ▼
Display Navigation	After Display of Record ▼
Contact Name View	Last Name, First Name ▼
Time Zone	(GMT -05:00) Eastern Time (US & Canada) ▼
Timestamp new records	Local Time (based on "Time Zone" selection) ▼
Blank Numerical Fields	Display With Zeros ▼
Uses GPS Data	Enabled ▼
Show Tooltips	Enabled ▼
Email Attachment Max Size	5 

Mapping URL – Allows for a number of mapping applications to be selected for use with the address mapping hyperlink.

Fiscal Year End – Set company's fiscal year end.

Quota Periods – Set whether 'Yearly', 'Quarterly' or 'Monthly'

Maximum File Upload Size – Options – Set the allowed file size limit upload for the Workgroup in the attachment section.

Import Send Single Record Email Notifications

Import Max Records for Sending Single Record Email Notifications

Accounting Software – enables QuickBooks for Opportunities.

Display Navigation – controls how Records list is displayed on search and update.

Contact name View – controls how Contact Names are displayed

Timezone – controls the WG timezone

Timestamp New Records – controls whether to timestamp new Records

Blank Numerical Fields -

Use GPS Data – enables the geo location feature on mobile apps

Show Tooltips -

Email Attachment Max Size – Set the allowed file size limit when attaching files to Emails.

REPORTS

Available Reports		Has Access To:
<div>Custom Reports</div> <ul style="list-style-type: none"> New Business and Re-signs Report GE Industry Summary Report Summit Opportunity Product Report Tactical Sales QA Report Origin Opportunity Report Summit Opportunity Detail Report Summit Opportunity Overview Report Summit Sales Team Opportunity Report Summit Penetration Report 	<div>Add >></div> <div><< Remove</div>	<div>Custom Reports</div> <ul style="list-style-type: none"> WIN Opportunity Report Opportunity Products Breakdown Forecast Report Marketing Manager Activity Report Opportunity Tracking Report Sample Custom Sales Comments Report Systems Sales Report Sample Salesperson Pipeline Report Sample Product Pipeline Report Sample Enterprise Pipeline Report



SUBMIT

Cancel

Controls the System Reports available and accessible by the Workgroup.

TRACK USER ACTIVITY

The Track User Activity function allows the user to query by Workgroup/User Type/Date Range to view individual user activity by:

-  Number of Logons
-  Number of Records Created
-  Number of Records Updated

TRACK USER ACTIVITY QUERY PAGE

[Help Guide](#)

Workgroup


* APP5 Test
 ***LeadMaster CRM
 DEMO - Spanish Label Set
 TEST LAB - Main
 TEST LAB - Schema


Select multiple workgroups by holding down the [Ctrl] or [Shift] key

User Type

Administrator
 Group
 Support
 Partner

Select multiple user types by holding down the [Ctrl] or [Shift] key

From Date 

To Date 

Real-time logon statistics are available for the past 60 days.

NOTE:

Only Billable Users are included in the User Activity Report

TRACK USER ACTIVITY REPORT

User Activity Report

Print Report

Email Report

Download Report

User Type(s): ALL
From 10/6/2020 to 10/6/2020

Workgroup: AB - Jo 4 - LM 2017

▼ Name	User Type	Title	Area	# Logons	# Records Created	# Records Updated
Enrollment System	Administrator			0	0	0
chirag darji	Administrator	President		0	0	0

The Track User Activity utility evaluates the following actions:

- ✚ The date used for tracking user activity is **the user's local time**
- ✚ Each logon results in an increment to the **number of logons**
- ✚ Adding a record results in an increment to the **number of records added**
- ✚ The following actions result in an increment to the **number of records updated**:
 - a. Updating a record from the sales update and edit profile pages
 - b. Assigning a record (via popup dialog)
 - c. Attaching a custom form
 - d. Adding an activity to a record or contact
 - e. Adding / editing a callback
 - f. Updating an attached custom form
 - g. Adding a note (via popup dialog)
 - h. Adding / updating a contact associated with a record (via popup dialog)
 - i. Adding / editing an opportunity

Note:

The number of records updated is calculated by adding each update for each record. If a User touched 5 Records and made 10 updates on each one, the number of Records Updated will show **50**.

TRACK LIBRARY ACTIVITY

Tracking Library Activity allows the administrator review activity by user, as seen in the sample Below.

View Library Activity

[Help Guide](#)

From Date: 10/10/2022 To Date: 11/10/2022 Go			
Date Downloaded	Name	User Name	Library File Downloaded
10/21/2022 2:15 PM	Joanna Hernandez	jo@leadmaster.com	13-LeadMaster API/LeadMaster-API-Documentation.pdf
10/21/2022 2:15 PM	Joanna Hernandez	jo@leadmaster.com	13-LeadMaster API/LeadMaster-API-Document.doc
10/28/2022 12:48 AM	Joanna Hernandez	jo@leadmaster.com	03-LeadMaster Application Info/Attaching Files Automatically to Records/Attaching Files to Records in LeadMaster.pdf
10/28/2022 12:49 AM	Joanna Hernandez	jo@leadmaster.com	03-LeadMaster Application Info/Outlook Sync/Outlook Sync.doc
10/28/2022 12:49 AM	Joanna Hernandez	jo@leadmaster.com	03-LeadMaster Application Info/Quickbooks Integration/QuickBooks Desktop Integration/LeadMaster QuickBooks User Guide.pdf
10/28/2022 12:49 AM	Joanna Hernandez	jo@leadmaster.com	03-LeadMaster Application Info/Quickbooks Integration/QuickBooks Desktop Integration/LeadMaster User Guide.doc
10/28/2022 12:51 AM	Joanna Hernandez	jo@leadmaster.com	03-LeadMaster Application Info/DB Schema/57 - Field Label Schema_Aug2011.xls
10/28/2022 12:54 AM	Joanna Hernandez	jo@leadmaster.com	OUTLOOK PLUG-IN TEST CHECKLIST - 9-9 and 9-10 Test Results.docx

The library is a convenient place to store all of your digital assets.

Product literature
Customer testimonials
Digital advertising
Electronic Invitations
Sample letters
eBooks
Whitepapers
Case studies etc.

It is a good idea to keep track of who is using these resources and who was responsible for the current version of the document in the library.

AUTOMATED RECORD ASSIGNMENTS

LeadMaster offers Round Robin and Zip Assignment to help automatically assign the new records to users in CRM.

ZIP ASSIGNMENTS

This function is basically used for US geographic assignments only in conjunction with:

- Landing Pages
- Leads coming into the system by email
- Leads coming from Custom web forms that allow for the automatic assignment of the Account Manager and/or Partner Rep by ZIP.

Zip Code Assignments

[Add Zip Code](#)
[Update Zip Code Assignments](#)
[Assign Records](#)
[Add Logic](#)
[Delete Logic](#)
[Save As...](#)

Workgroup: **AB - Jo 4 - LM 2017**
 Range: - Group: **All** Support: **All** Partner Rep: **All** Logic: **239 - Test**

Zip Code	Support	Partner Rep	Other Partner Rep	Other Support	None Partner Rep	None Support
<input type="checkbox"/> 4105	Support - Joanna Hernandez					
<input type="checkbox"/> 4106	Support - Joanna Hernandez					
<input type="checkbox"/> 4107	Support - Jo Admin					

Logic level can be set up and ZIP3s and/or ZIP5s can be assigned to them. The Logic level is then built into and referenced by the custom web form so that when records are added to a Workgroup they will be automatically assigned.

Add Record allows for the manual input and maintenance of ZIP5/ZIP3 assignments.

When custom web forms are developed, the user usually provides a file of their Account Managers and/or Partner Reps by ZIP5 or ZIP3 for loading into the above table.

The Default setting is used to designate a default Account Manager and/or Partner Rep assignment if there is no ZIP5/ZIP3 match in the Zip Code Assignments table.

ACCOUNT MANAGER ROUND ROBIN QUEUE

Round-robin is a method of lead distribution whereby leads are distributed among a group of account managers by the order in which they were received. For example, without additional conditions, if there were 2 reps the first lead would go to the first rep, the second lead would go to the second rep, the third lead would go to the first rep, the fourth lead would go to the second rep and so on.

The following page shows the management interface that allows you to select those account managers who will participate in 'Round Robin' assignments (all or a subset). This also allows you to select three options of 'Never', 'Always' or 'User Choice' for this Round Robin.

Support Round Robin Queues

[Add Round Robin Queue](#)
[Help Guide](#)

Options

Use the round robin queue to assign supports when new records are added: User choice ▼
 Supports must be logged in to be selected for record assignment ☐

Round Robin Queues	
Name	
Default	edit
RR	edit delete

In addition, you can check the box that only assigns a lead **"IF"** the account Manager in question is **logged in at the time**.

PARTNER REP ROUND ROBIN QUEUE

Partner Rep Round Robin Queue allows an administrator to specify a circular queue of partner reps to which new records are automatically assigned as they are added.

Authorized administrative users can manage the round robin queue by clicking on "Administration" at the top of any page and then clicking on the "Partner Rep Round Robin Queue" link on the "Administration" page.

From the "Administration" page, click on the "Partner Rep Round Robin Queue" hyperlink to display the "Partner Rep Round Robin Queue" page. From this page, you have the following options:

Partner Rep Round Robin Queues

[Add Round Robin Queue](#)
[Help Guide](#)

Options

Use the round robin queue to assign partner reps when new records are added: Never

Partner Reps must be logged in to be selected for record assignment ☐




Round Robin Queues

Name
Default

[edit](#)

1. Select one or more partner reps from the list of available partner reps and click on the "Add >>" button to add the selected partner reps to the round robin queue.
2. Select one or more partner reps from the list of partner reps in the round robin queue and click on the "<< Remove" button to remove the selected partner reps from the round robin queue.
3. Select one partner rep from the list of partner reps in the round robin queue and click on the "Default Assignee" button to specify the selected partner rep as the default assignee if no other partner reps are available for assignment to a new record.
4. Select from the list of choices - 'Always', 'Never' or 'User Choice' to indicate when the round robin queue is used for assigning a partner rep to a new record.
5. Click on the "Partner reps must be logged in to be selected for record assignment" checkbox, if partner reps must be logged in to be assigned to a new record.

The partner rep round robin queue can be used to assign partner reps to new records:

-  Always
-  Never
-  User choice - the user adding the record(s) can choose to have the partner rep assigned from the round robin queue.

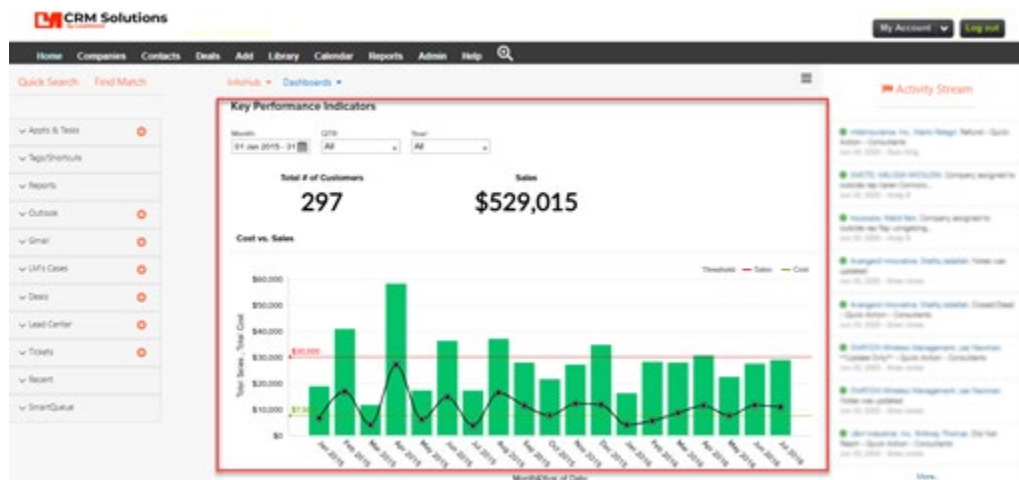
MANAGE INFO CENTER, DASHBOARD AND SHORTCUTS

Easily create customized charts and graphs that can be accessed by multiple users within the system.

- Display a list of existing charts saved for the dashboard, which includes: the saved search used to create the chart, the chart type, chart size and display order.
- Can specify the display order, edit and delete the chart.
- Availability is specified by user.

INFORMATION CENTER

Clicking on Home at the top of any screen brings the user to the Information Center, which serves as the landing page for the online application interface. It provides a place to provide both user-specific and system-wide information.



The Information Center includes the Information Board, which acts as the main body of the Information Center and an Event Tracker to highlight upcoming events and dates of importance. One database may have many information boards to tailor information to different audiences, but each user has access to only one information board.

Access Privileges:

All users have access to an information board, as set in their user permissions. Subsets of users within a database may see different information boards depending on their access privileges and the information board choices available for the particular database. Users with the necessary access privileges can edit, update and delete information displayed in the Information Center.

ADD NEW INFORMATION CENTER

Add Info Center

[Info Center List](#) | [Help Guide](#)

Info Center Title

☒ Is default Info Center for AB - Jo 4 - LM 2017

Info Centre

Heading

Info Center Body

File Edit Insert View Format Table Tools

Powered by TinyMCE

Words 0

[SUBMIT](#) [CANCEL](#)

1. Go to the Administration Page
2. Under Homepage, Dashboard and Shortcuts, Click **Add/Edit Message Board**
3. On the Info Center List, click **Add Info Center**
4. This is a full HTML editor (TinyMCE) so it can contain variable size type, graphics and even video.
5. Enter your Info Center Title
6. Mark as default for the Workgroup and all users
7. Enter Heading and Info Center Content.
8. Once complete, Click Submit to save all the changes.

The Information Center is uniquely assigned for each workgroup. If multiple message boards are available to the WorkGroup then the message board can be assigned at the individual level through the Internal Security page.

INFORMATION CENTER SECURITY

Information Center Security

USER SELECTION - Display the Information Center on the home page of all users or no users

☐ Display the Information Center on the home page of ALL users ☒ Remove the Information Center from the home page of ALL users

USER SELECTION - Display the Information Center on the home page of specific users

Available Users		Selected Users:
<div> <div>Andy B5</div> <div>Eljie Lagunay</div> <div>Enrollment System</div> <div>Jo ActMan 4</div> <div>Jo Admin</div> <div>Jo Admin 3</div> <div>Jo Global2</div> <div>Jo Hernandez2</div> <div>Jo Hernandez6</div> </div>	<div>Add >></div> <div><< Remove</div>	<div></div>

1. Display the Information Center on the Homepage for all users.
2. Remove the Information Center from the Homepage for all users.
3. Display the Information Center on the Homepage of specific/selected users.

EDIT AN EXISTING INFO CENTER

Info Center List

[Add Info Center](#) [Help Guide](#)

Workgroup: AB - Jo 4 - LM 2017

Info Centers / Events

AB - Jo Hernandez	Default	+ 🔍
.Services Info Center		+ 🔍
Info Center 1		+ 🔍
Test-Jo		+ 🔍

1. Go to the Administration Page
2. Under Homepage, Dashboard and Shortcuts, Click **Add/Edit Message Board**
3. On the Info Center List, click on **the name of the Info Center** you wish to update
4. When updates are completed, click **Submit** to save the changes.

DELETE AN EXISTING INFO CENTER

USER SELECTION - Display the Information Center on the home page of all users or no users

☐ Display the Information Center on the home page of ALL users ☒ Remove the Information Center from the home page of ALL users

USER SELECTION - Display the Information Center on the home page of specific users

Available Users Selected Users:

Andy B5
Eljie Lagunay
Enrollment System
Jo ActMan 4
Jo Admin
Jo Admin 3
Jo Global2
Jo Hernandez2
Jo Hernandez6

Add >>

<< Remove

Update Information

Date Created: Before 8/12/2002 **Last Updated:** 9/3/2019 6:24 AM **Updated By:** Joanna Hernandez

SUBMIT
DELETE
CANCEL

1. Go to the Administration Page
2. Under Homepage, Dashboard and Shortcuts, Click **Add/Edit Message Board**
3. On the Info Center List, click on **the name of the Info Center** you wish to delete.
4. Scroll down at the bottom of the page and click **Delete**.

HOMEPAGE DASHBOARDS

Easily create customized charts and graphs that can be accessed by multiple users within the system.

Display a list of existing charts saved for the dashboard, which includes: the saved search used to create the chart, the chart type, chart size and display order.

Can specify the display order, edit and delete the chart.

GLOBAL DASHBOARD

Administrators can create a global dashboard report and make it visible on the home page of one or more users.

ADD A GLOBAL DASHBOARD REPORT

Add Report

[Home Page Dashboard Reports List](#)
[Help Guide](#)

Report Name

Dashboard

Report From the list of available dashboard reports.

Filter Data for the Report ☐ No criteria set

Search Filter From the list of available public saved searches.

Chart Type

of column

Display Order

1. Go to the Administration Page
2. Under Homepage, Dashboard and Shortcuts, Click **Homepage Dashboards** to display the **Homepage Dashboard Reports**
3. From this page, click **Add Report**
4. Enter a name for the dashboard report.
5. Select a dashboard report from the list of available reports.
6. Select a search filter for the report from the list of available public saved searches.
7. Select the chart type, chart size and enter the display order for the report.
8. Click "Submit" to save the new dashboard report.

Once saved, you can now make the dashboard report visible on the home page of one or more users:

of column | One column ▾

USER SELECTION - Display the dashboard report on the home page of all users or no users

☒ Display the dashboard report on the home page of ALL users ☐ Remove the dashboard report from the home page of ALL users

USER SELECTION - Display the dashboard report on the home page of specific users

Available Users

- Account Manager
- Jo ActMan 4
- LM Test
- Administrator**
- Jo Admin
- Jo Admin 3
- Andy B5
- Jo III Hernandez
- Jo Hernandez2

Add >>

<< Remove

Selected Users:

SUBMIT Cancel















1. Click on the "Display the dashboard report on the home page of ALL users" checkbox to make the dashboard report visible on the home page of all users who have access to the workgroup.
2. Click on the "Remove the dashboard report from the home page of ALL users" checkbox to remove the dashboard report from the home page of all users who have access to the workgroup.
3. Select one or more users for the list of available users and click "Add >>" to make the dashboard report visible on the home page of the selected users.
4. Select one or more users for the list of selected users and click "<< Remove" to remove the dashboard report from the home page of the selected users.

EDIT A GLOBAL DASHBOARD REPORT

1. From the **Home Page Dashboard Reports List** page, click on the **edit hyperlink** to the right of an existing dashboard report to display the **Edit Dashboard Report** page.
2. Change the name for the dashboard report.
3. Change the search filter for the dashboard report.
4. Change the chart type, chart size and display order for the dashboard report.
5. Edit the visibility of the Report
6. Click **Submit** to save changes to the Report.

ADD A GLOBAL DASHBOARD

Home Page Dashboard Reports

Home Page Dashboards Add Report Help Guide						
Dashboard	Report Name	Report Type	Search Filter	Chart Type	Display Order	
Activity Feed	Activities	Activity Hub			1	 
Created By Hernandez Joana on Tuesday, May 23, 2017 7:09:00 AM						
Global Reports	All Records		All Records	3D pie	0	 
Created By Hernandez Joana on Friday, December 15, 2017 7:26:00 AM						
Global Reports	QA3 - All Records - Global		QA3 - All Records - Global	3D pie	0	 
Created By Hernandez Joana on Friday, December 15, 2017 7:33:00 AM						
Global Reports	QA2 - Global		QA2 - Global	3D pie	0	 
Created By Hernandez Joana on Friday, December 15, 2017 8:01:00 AM						
Global Reports	Tesy	Quick Actions Summary (Chart)	Tesy	3D pie	1	 
Created By Hernandez Joana on Saturday, October 6, 2018 9:16:00 AM						
Global Reports	QA II	Quick Actions II - Summary Report (Chart)		3D pie	1	 
Created By Hernandez Jo III on Monday, November 13, 2017 11:47:00 AM						
LM	test	Outstanding Activities	test	Map Marker	5	 
Created By Hernandez Joana on Friday, September 11, 2020 12:36:00 PM						

1. From the Home Page Dashboard Reports List page, click Homepage Dashboards
2. Click Add Dashboard
3. Enter a name for the dashboard
4. Click **Submit** to save the changes.

PERSONAL DASHBOARD

Users with appropriate privileges to Add / Edit / Delete / View Personal Dashboards and Reports.

ADD A PERSONAL DASHBOARD REPORT

[My Dashboard Reports](#)
[Help Guide](#)

Report Name

Available Reports

Filter Data for the Report ☐ No criteria set

Dashboard

Chart Type

of column

Display Order

Add Another Report ☐

1. Go to the Administration Page
2. Under Homepage, Dashboard and Shortcuts, Click **Dashboard Settings** to display **My Dashboard Reports**
3. From this page, click **Add Report**
4. Enter a name for the dashboard report.
5. Select a dashboard report from the list of available reports.
6. Filter the Report.
7. Select the chart type, chart size and enter the display order for the report.
8. Click "Submit" to save the new dashboard report.

EDIT A PERSONAL DASHBOARD REPORT

[My Dashboard Reports](#)
[Help Guide](#)

Report Name

Filter Data for the Report ☐ No criteria set

Dashboard

Chart Type

of column

Display Order

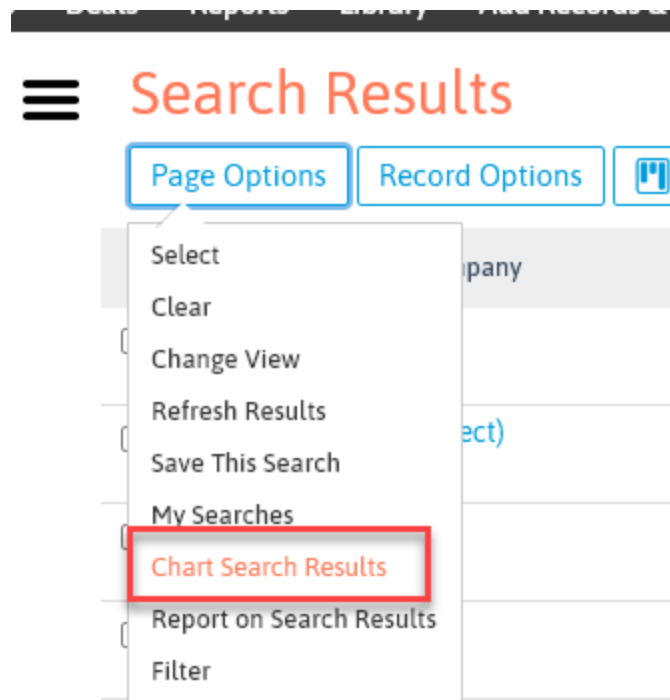
Select Global Dashboard

1. From **My Dashboard Reports List** page, click on the **edit hyperlink** to the right of an existing dashboard report to display the **Edit Dashboard Report** page.
2. Change the name for the dashboard report.
3. Change the search filter for the dashboard report.
4. Change the chart type, chart size and display order for the dashboard report.
5. Click **Submit** to save changes to the Report.

ADDING A PERSONAL DASHBOARD

1. From the My HomePage Dashboard Reports List page, click My Dashboards
2. Click Add Dashboard
3. Enter a name for the dashboard
4. Click **Submit** to save the changes.

ADDING CHARTS FROM SEARCH RESULTS



1. From the Search Results page, click Page Options and select Chart Search Results
- Chart Search Results**

[Help Guide](#)

Chart Title

Chart Type

Field

2. Enter the Chart Name
3. Select Chart Type
4. Select Field to Chart
5. Click **Submit**

6. On the next page, click on **Save to Dashboard**.

Chart 1

[Save to Dashboard](#) [Email Report](#) [Create Shortcut](#)



7. Select the Dashboard where you wish to display the new chart and click **Submit**.

Save to Dashboard

[Help Guide](#)

Chart Name

Dashboard Group

- None--
- Action Hub
- My Dashboard
- Activity Feed
- Global Reports
- LM

HOMEPAGE SHORTCUTS

Administrators can create a shortcut to a report and make a link to the shortcut visible on the home page of one or more users.

Authorized administrative users can add, update and delete shortcuts to reports by clicking on "Administration" at the top of any page and then clicking on the "Home Page Shortcuts" link on the "Administration" page.

ADDING A HOMEPAGE SHORTCUT

1. Go to the Administration Page
2. Under Homepage, Dashboard and Shortcuts, Click **Home Page Shortcuts**
3. From this page, click **Add Shortcut**
4. Enter a Shortcut Name
5. Select a Report from the list of available reports
6. Select a filter from the list of available public saved searches.
7. Click Submit

Once saved, you can now make a link to the shortcut visible on the home page of one or more users:

1. Click on the "Display a link to the shortcut on the home page of ALL users" checkbox to make a link to the shortcut visible on the home page of all users who have access to the workgroup.
2. Click on the "Remove the link to the shortcut from the home page of ALL users" checkbox to remove the link to the shortcut from the home page of all users who have access to the workgroup.
3. Select one or more users for the list of available users and click "Add >>" to make the link to the shortcut visible on the home page of the selected users.
4. Select one or more users for the list of selected users and click "<< Remove" to remove the link to the shortcut from the home page of the selected users.

EDITING A SHORTCUT

1. From the "Home Page Shortcuts List" page, click on the "edit" hyperlink to the right of an existing shortcut to display the "Edit Home Page Shortcut" page.
2. Change the name for the shortcut.
3. Change the search filter for the shortcut.
4. Click "Submit" to save changes to the shortcut.

HOMEPAGE SEARCHES

You may save Searches for a WorkGroup so they show up on the Home Page / Information Center. You can apply user-level security to individual searches.

ADD A HOMEPAGE SEARCH

There are several ways to save searches. Let's take a look at adding searches from the Administration Page.

1. Go to the Administration Page
1. Under Homepage, Dashboard and Shortcuts, Click **Homepage Searches** to bring up the **Homepage Searches List** page
2. On this page, click **Add Search**
3. Enter a name for the search.
4. Click on the "Search Criteria" hyperlink to define the criteria for the search.
5. After entering your search criteria you'll be returned to the 'Add Search' page where you'll have the choice to 'Apply Security for Users Using this Search'. **It is strongly recommended that you always click 'Yes' to apply security.** The reason being that the user who creates the search may have access to records that another user using the search doesn't have access to. If you click no to 'Apply Security for Users Using this Search' you will bypass the security and allow users with access to this search to see records that they otherwise wouldn't have access to.
6. Click "Submit" to save the new search.

Once saved, you can now make a link to the search visible on the home page of one or more users:

Search Name

Search Criteria No criteria set

Apply Security For Users Using this Search No

USER SELECTION - Display a link to the search on the home page of all users or no users

☐ Display a link to the search on the home page of ALL users ☒ Remove the link to the search from the home page of ALL users

USER SELECTION - Display a link to the search on the home page of specific users

Available Users		Selected Users:
<div>Jo ActMan 4</div> <div>Jo Admin</div> <div>Jo Admin 3</div> <div>Andy B5</div> <div>Jo Global2</div> <div>Joglobal H</div> <div>Jo Ill Hernandez</div> <div>Jo Hernandez2</div> <div>Jo Hernandez6</div>	<div>Add >></div> <div><< Remove</div>	

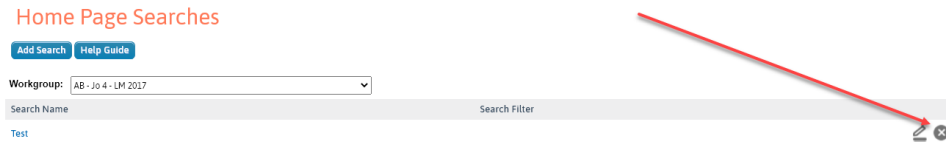
1. Click on the "Display a link to the search on the home page of ALL users" checkbox to make a link to the search visible on the home page of all users who have access to the workgroup.
2. Click on the "Remove the link to the search from the home page of ALL users" checkbox to remove the link to the search from the home page of all users who have access to the workgroup.
3. Select one or more users for the list of available users and click "Add >>" to make a link to the search visible on the home page of the selected users.
4. Select one or more users for the list of selected users and click "<< Remove" to remove the link to the search from the home page of the selected users.

EDITING A SEARCH

1. From the "Home Page Searches List" page, click on the "edit" hyperlink to the right of an existing public saved search to display the "Edit Search" page. From this page:
2. Change the name for the search.
3. Click on the "Search Criteria" hyperlink to re-define the criteria for the search.
4. Click "Submit" to save changes to the search.

DELETE A SEARCH

To delete a Search - from the Homepage Searches List, click the x icon beside the Search name.



Another way to save searches to the Home Page is through the search engine results page.

1. From the Search results page, click Page Options and select Save this Search
2. This will bring up the 'Save Search' window where you'll be able to give the search a name
3. Make it public for everyone in the WorkGroup or save it just for you.
4. You'll also have the option of applying security.
5. Click **Submit**

CAMPAIGN MANAGEMENT




















The Campaign Management page is where you set up the marketing campaigns. Organizing records by campaign makes it easy to search and assign records. It also provides a means to measure marketing ROI.

You get to Campaign Management via the Administration or Campaign menu in the top banner of the application.

Campaigns can be Added, Edited and Deleted via this page.

Options

Campaigns 1 thru 13 - (13 total Campaigns)

Campaign	Campaign Type	Date Created	# of Records	Campaign ID	
<input type="checkbox"/>  Bugs		3/29/2019	65	Bugs	 
<input type="checkbox"/> Campaign 1		6/20/2017	47	CP-1343	 
<input type="checkbox"/> Campaign 2		7/13/2017	30	Campaign 2	 
<input type="checkbox"/> Campaign 3		7/27/2017	0	Campaign 3	 
<input type="checkbox"/> Dharmesh		11/22/2019	22	CP-1863	 
<input type="checkbox"/>  Enhancement Requests		10/3/2018	21	Enhancement Requests	 
<input type="checkbox"/> Homeowner		2/13/2019	24	Homeowner	 
<input type="checkbox"/> IMPORT 3081		9/6/2019	20	IMPORT 3081	 
<input type="checkbox"/>  Jo			27	Jo	 
<input type="checkbox"/> Jo - Campaign	Direct Mail	5/2/2020	0	CP-1891	 
<input type="checkbox"/>  LeadMaster Tickets		10/3/2018	14	LeadMaster Tickets	 

This table controls the pull-down values in the Campaign field on the Search page. It is important to note that the application internally stores the Campaign ID in the individual record in the database and does a table look up to display the Campaign name. This allows for the user to change the Campaign name at any time.

The Campaign record contains a lot of marketing type of information that can be stored and retrieved regarding an individual campaign.

ADD A CAMPAIGN

[Expand All](#)

Program Manager

Program

Launch Date

Program Manager

Note

#fddc73

Campaign ID

End Date

Campaign Description

CP-1919

-- Select --

Record Type Options

Progress Bar

Quick Actions

Sales

Feedback

Add Lead Default

Lead Source

Projected Number of Leads

Projected Leads Closed

Projected Revenue

Projected Expenses

Primary List Source

Target Industry

Target Company Revenue

Target Number of Employees

Target Contact Titles

Target List Size

Projected Lead Percentage

Estimated Contact Size

None

1. ☒ 2. ☐ 3. ☐

None

None

☐

-- Select --

0

0

0.00 €

0.00 €

0

0.00 €

1. Access the the Campaign List by either clicking **Campaigns** at the top of any page or by going to the **Campaign Management section** on the **Administration** page.
2. On the Campaign List page, click **Options** and select **Add new Campaign**
3. Enter all relevant information for the new campaign.

Please note that all fields marked with the checkmark icon are required fields; these fields must be completed in order to create and set up the new campaign.

Campaign name (required)

The campaign name is a required field displayed in records associated with the campaign and also used as a parameter for searching and for setting access privileges. Choose a brief but descriptive name that will be recognizable to your users.

Campaign ID (required)

The campaign ID is the second required field and provides an additional identifier, often a company-determined alphanumeric code associated with the campaign. For example, the Acme Inc. campaign called Widgets might be given the ID Acme-097 and their next campaign would be Acme-098. Since the ID is used primarily for importing data and is not visible in the main record profile, most users will not need to be familiar with this ID. However, it is recommended that users choose logical, preferably sequential coding systems in order to reduce the likelihood of data entry error when records destined for import into the database are tagged for a specific campaign using the Campaign ID.

Campaign comments

The campaign comments field provides an area for the campaign manager to provide a brief text description of the campaign. This description is included in the brief campaign overview window that pops up when the user clicks on the target icon for a record in the search results.

Associate custom form

When creating a new campaign, if there are custom feedback or sales forms available to associate with records added to the new campaign, the form names will appear in the two drop-down boxes at the top of the Add Campaign interface. Make the desired selections as part of the campaign setup. These choices will only appear if custom forms have been created and have been associated with All Campaigns. In some cases, there may be custom forms available but access may be restricted to certain campaigns. In this case, it will be necessary to first create the campaign by submitting it. Then the new campaign can be associated with the form by someone with the appropriate administrative privileges.

A **Feedback custom form** allows for a series of questions and answers regarding a lead at the bottom of the Sales Update page.

The **Sales custom form** allows for a custom set of fields to appear as part of the Sales Progress area on the Sales Update page. These are discussed in more detail in the Custom Forms section.

User access to new campaigns

When a campaign is first established, only those users with campaign access set to All in their security profile will automatically be able to view results from the new campaign. For all other users to whom you want to extend access privileges specifically for this new campaign, logon privileges must be revised to add the new campaign to the list of campaigns to which they have access in order for them to be able to view records associated with the new campaign.

MARKETING / EMAIL / LEAD NURTURING CAMPAIGNS

BOUNCED EMAIL MESSAGE MANAGEMENT

Bounce Management is built-in to the email-marketing component of the CRM system. That means you can manage bounces anytime you send emails from the CRM system, examples include:

- Standard emails,
- HTML invitations
- Newsletters
- Lead nurturing etc.

To access the Bounce Email Manager, click on **Administration** > **Bounced Email Addresses**.

This menu takes you to the Bounced Email Addresses page.

Bounced Email Addresses

[Select Page](#)
[Clear Page](#)
[Enable Email Addresses](#)
[Disable Email Addresses](#)
[Delete Bounce Records](#)
[Download Bounced Email](#)

Order By: ORDER BY Hard Bounce Count DESC, Contact Name

Email Address [GO](#)
Rows to Display: 200

Contact Name	Email Address	Soft Bounces	Last Soft Bounce Date	Hard Bounces	Last Hard Bounce Date	Send Email Enabled
--------------	---------------	--------------	-----------------------	--------------	-----------------------	--------------------

The top menu includes the following options:

- Select page – selects all records in the list
- Clear page – de-selects all records in the list
- Enable email addresses – marks the selected email addresses as good
- Disable email addresses – marks the selected email addresses as bad
- Delete bounce records – deletes the selected bounce records

This page lists all bounced email addresses sent from the WorkGroup. Each record in the list contains the following:

- Name of the contact associated with the email address
- Email address
- Soft bounces
- Last soft bounce date
- Hard bounces
- Last hard bounce date
- Send Email Enabled

Send Email Enabled - this attribute indicates whether or not you want to send email to that address. Yes, means that you are still sending email to that contact. No means you are not.

Disable / Enable link - this will mark the email address as bad or good in the contact record. A bad email address will not receive email.

Delete link – this will delete the record of bounces for this email address. It will not delete the email address nor will it disable sending email to this address.

If you don't want to send email to this address you must click 'Disable'.

By clicking on Disable email you are updating the **Primary Contact Information** Page with a **Bad Email** Checkbox.

22 2825 II 2825 II

Date Created: 4/24/2019 Last Updated: 4/10/2020 - chirag darji

★ indicates a required field

Prefix: DEMO LNAME

Custom Contact Field:

Contact Dropdown: --- Please Select ---

★ First Name: 2825 II

Checkbox: ☐ Option 1 ☐ Option 2

Last Name: 2825 II

Title:

Title Code: Please Select

Address 1: Enter a location

Address 2:

Address 3:

City:

State:

Zip:

Country:

New Contact CField:

Phone:

Alternate Phone:

Cell/Mobile:

Fax:

Email: theiohernandez2@gmail.com

Bad Email: ☒

Contact Method:

LEAD-XPRESS / EMAIL NOTIFICATIONS

DAILY EMAIL NOTIFICATION CONTENT

If the customer chooses to have Daily Email Notification [this feature needs to be requested when the individual workgroup is set up and turned on in the individual user logon] then a template must be set up to define the basic content and other key data. Daily Email Notifications are prepared and sent to individuals at 1am each day.

Email Notifications can be produced for any of the four assignment level personnel:

Group (main contact)
Acct Mgr
Partner (main contact) and
Partner Rep

The Email Notification contains the following events:

New Leads the prior day (input via load process or manual add)
Leads reassigned the prior day
Lead expiring (see description of this feature in Campaign Management)
Call Backs today

Description of Email Notification Content fields:

Company – the name of the workgroup that this Email Notification Content belongs to
From Name – What is to appear in the From Name of the individual Email Notification
From Address – this address needs to be set up when the signing up for the application
Body – what appears in the Email Notification preceding the four items listed above

The following is what the Email Notification Content template screen looks like:

Workgroup

Type

Daily Email Notification Content

From Name

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

Subject

Body

File	Edit	Insert	View	Format	Table	Tools	Help
		Paragraph					

Below is the daily summary of activity on your accounts. Please do not reply directly to this e-mail message, as this is an unattended e-mail account.

P 26 WORDS POWERED BY TINY

The following is what a sample Daily Email Notification would look like that was sent out by the application at 3 AM EST:

From: "Alive Sales & Marketing Department" <emailnotifications@client.com>
 To: "Mike Jolly" <mike.jolly@alive.com>
 Subject: Leads Notification

Company: Alive

[Please do not reply to this e-mail, this is an unattended e-mail account]

This is to notify you that a sales opportunity has been posted on our lead management system.

Go to <http://www.client.com/login> and log into using your user name.

If you have any questions, please contact Sandy Perko at sperko@alive.com

- 1 New Lead(s) assigned on 17-Jul-2010
 - Leeds Consulting Group: Bill Jones
- 4 Re-assigned Lead(s) on 17-Jul-2010
 - Heads Up Technologies: Frank Smith
 - Inet Inc.: Sally Fields
 - Intervoice Inc.: Sharon Young
 - Motorola: Bob Lang
- 3 Lead(s) must be followed-up immediately
 - Analog Modules: Dick Mason
 - Comtech Systems: Nancy Wills
 - Dynacs Engineering Co. Inc: Ronda Taylor

Note: Group and Partner main contacts will receive a "recap" of their respective Acct Mgrs or Partner Reps (if they have Email Notification activated)

EXPRESS EMAIL NOTIFICATION CONTENT

If the customer chooses to have Express Email Notification [this feature needs to be turned on in the individual user logon] then a template must be set up to define the basic content and other key data. Express Email Notifications are prepared and sent to individuals immediately at the time that a lead is manually assigned online.

Email Notifications can be produced for any of the four assignment level personnel:

Organization (main contact)

Account Managers

Partner (main contact)

Partner Reps

Description of Email Notification Content fields:

Company – the name of the workgroup that this Email Notification Content belongs to

From Name – What is to appear in the From Name of the individual Email Notification

From Address – this address needs to be set up when the signing up for the application

Body – what appears in the Email Notification preceding the four items listed above.

The following is what the Email Notification Content template screen look like:

From Name

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

Insert Merge Field

Subject

Insert Merge Field

Body

File Edit Insert View Format Table Tools Help

Paragraph

You have a new lead. Please see below for details. Please do not reply directly to this e-mail message, as this is an unattended e-mail account.

Workgroup: [WG]

Please remember to update the status of this item by going to [Session LogonPage]

Campaign: [Marketing_Programs_Table.Campaign_Name]

P 71 WORDS POWERED BY TINY

The following is what a sample Express Email Notification would look like:

Express Lead Support <leads@crmtool.net>
 to joanna.hernandez ▾

You have a new lead. Please see below for details. Please do not reply directly to this e-mail message, as this is an unattended e-mail account.

Workgroup: AB - Jo 4 - LM 2017

Please remember to update the status of this item by going to https://websvr1app4.leadmastercrm.com/index_logon_dlg.asp

Campaign: Bugs

Lead Score:

Company:

Address 1:

Address 2: :

City:

State:

Zip:

Contact: First Name: Q44

Title:

Phone:

Email: test@test.com

Note: Group and Partner main contacts can receive copies of the Express Email Notifications of their respective Acct Mgrs or Partner Reps (if they have Email Notification activated). But they will be not be combined like the Daily Email Notifications but will be individual emails of each one sent to the respective Acct Mgrs or Partner Reps.

CUSTOMIZE SCREENS & FIELDS / RECORD MANAGEMENT

CUSTOMIZE PAGES

Perhaps one of the more powerful elements within Administration is the "Customize Pages" function, which provides the ability to change labels/fields, turn off sections, re-orient sections, enable "Click-Actions" and more.

The Customize Pages displays a list of pages that can be customized for the workgroup (home, banner menu, search etc. The customization is specific to an individual label set.

The label set being modified is displayed on the page list page.

Page Customization - Page List

Custom Fields

Current Workgroup: AB - Jo 5

Current Label Set: AB - Jo 5 Label Set2

Save As

Record Pages

Visible	Page	Description	
<input checked="" type="checkbox"/>	Sales Update	Sales Update page	
<input checked="" type="checkbox"/>	Edit Record	Edit Record page	
<input checked="" type="checkbox"/>	View Profile	View Profile page	
<input checked="" type="checkbox"/>	My Custom View	My Custom View page	
<input checked="" type="checkbox"/>	CRM-Xpress Edit Profile page	CRM-Xpress Edit Profile page	
<input checked="" type="checkbox"/>	CRM-Xpress Sales Update page	CRM-Xpress Sales Update page	
<input checked="" type="checkbox"/>	CRM-Xpress Quick Edit page	CRM-Xpress Quick Edit page	

Adding / Editing CRM Elements

Visible	Page	Description	
<input checked="" type="checkbox"/>	Add New Record	Add New Record page	
<input checked="" type="checkbox"/>	Quick Edit	Quick Edit page	
<input checked="" type="checkbox"/>	Add / Edit Contact	Add / Edit Contact page	
<input checked="" type="checkbox"/>	Add / Edit Appt / Call Back	Add / Edit Appt / Call Back page	
<input checked="" type="checkbox"/>	Add / Edit Opportunity / Deal	Add / Edit Opportunity / Deal page	
<input checked="" type="checkbox"/>	Add / Edit Quote	Add / Edit Quote page	
<input checked="" type="checkbox"/>	Add / Edit Case	Add / Edit Case	
<input checked="" type="checkbox"/>	Add / Edit Campaign	Add / Edit Campaign page	

Search Pages

Visible	Page	Description	
<input checked="" type="checkbox"/>	Search Record	Search Record page	
<input checked="" type="checkbox"/>	Search Opportunity / Deal	Search Opportunity / Deal page	
<input checked="" type="checkbox"/>	Search Case	Search Case page	
<input checked="" type="checkbox"/>	Search Contact	Search Contact page	
<input checked="" type="checkbox"/>	Search Archive	Search Archive page	

Admin / Other Pages

Visible	Page	Description	
<input checked="" type="checkbox"/>	Administration Menu	Administration menus	
<input checked="" type="checkbox"/>	Home	Home page	
<input checked="" type="checkbox"/>	Banner Menu	Top level menus	
<input checked="" type="checkbox"/>	Assign Record	Assign Record	
<input checked="" type="checkbox"/>	Merge Record	Merge Record	
<input checked="" type="checkbox"/>	Right Panel Display	Right Panel Display Page	
<input checked="" type="checkbox"/>	Left Panel Display	Left Panel Display Page	

CUSTOMIZE LABELS

Authorized administrative users can view, create and edit custom field labels by clicking on Administration at the top of any page and then going to the Custom Labels section. This page displays all fields, including the Label Name (default value), the Custom Label and the Database Field with which these are associated.

The Custom Labels pertain to the set of field label values that are to be used for a particular logon.

There is a standard template that the application uses called **Standard**. This template can be copied and renamed to a unique name and then modified to contain whatever values you want for a particular Database or Workgroup.

Custom Labels are accessed by clicking on the Administration function in the top banner of the application and then selecting the hyperlink '**Customize Labels**'.

The following is an example of the **Custom Labels** list page:

Standard Label	Database Field	Custom Label
(None)	FollowUpType2	Event 2
3 Month Marketing Forecast (By Acct Mgr)		Select Record
3 Month Marketing Forecast (By Group)		3 Month Marketing Forecast (By Acct Mgr)
3 Month Opportunity Forecast (By Acct Mgr)		3 Month Marketing Forecast (By Group)
3 Month Opportunity Forecast (By Group)		3 Month Deal Forecast (By Acct Mgr)
AccMgr Performance Goals Report		3 Month Deal Forecast (By Group)
Account		AccMgr Performance Goals Report
Accounts		Account
Acct Mgr	EE_REP	Accounts
Activity		Acct Rep
Activity Time		
Add Callback		Activity Time
Add Note		Add Callback
Additional Contacts		Add Note
Address	Address	Additional Contacts
Address 2	Address2	Address 1
Address 3	Address3	Address 2
Advanced Administration		Address 3
All Leads		Advanced Administration
All Phone	PHI_PHONE2	All Leads
Area Code	Area Code	All Phone
Ascending		Area Code
Assign Comment	AssignComment	Ascending
Assign Lead		Assign Comment
Assignment		Assign Lead
Assignment Report		Assignment
Attach Custom Form		Assignment Report
Attached Audio Files		Attach Custom Form
Attached Files		Attached Audio Files
Attached Files Report		Attached Files
Attached Forms		Attached Files Report
Average Order Size		Custom Forms
Back to Results		
Bad Email		Back to Results
Banner - Accounts		
Banner - Add New Records		Accts/Targets
Banner - Add Records & Leads		Add New Records
Banner - Admin		Add/Import
Banner - Administration		Admin
Banner - Advanced Administration		Administration
Banner - Advanced Customization / Options		Advanced Administration
Banner - Automated Record Assignments		Advanced Customization / Options
		Automated Record Assignments

ADDING A NEW LABEL SET

To create a new custom label set you need to:

1. Click on the **Label Set** dropdown and select either the Standard or another one that you have access to copy.
2. Then click on Save As
3. Tag and type in the name that you want to call the new custom label set.
4. You will be prompted to Identify what workgroup(s)/company(s) you want to assign the new current label set to.
5. Admin users can only view those custom label sets that have been assigned to workgroup(s)/company(s) they have access to.

EDITING A LABEL SET

NOTE: If you have more than one label set established for your company database(s), it is important to double-check that you are editing the correct label set by confirming that the correct label set name appears in the Current Label Set drop down box at the top of the editing window before making any changes.

You can modify the field labels by clicking on the edit hyperlink to right of the Custom Label field tag you want to modify.

The following is the page that is displayed when you click on the edit hyperlink.

Date Created: 11/12/2019 10:15 PM **Last Updated:** 11/12/2019 10:15 PM **Updated By:** Joanna Hernandez

Standard Label Account

Database Field

Label Group Basic

Custom Label

Use / Uses Standard Label ☒

Is Being Used ☒

REQUIRED FIELDS

This function allows for the setting up of required fields.

This applies to:

- Manual Add a Record page for all users
- Certain fields in the Sales Progress section of the Edit Profile and Sales Update pages if user has Mandatory Fields turned on
- Certain fields in the Opportunity section of the Edit Profile and Sales Update pages if user has Mandatory Fields turned on
- Certain fields in the Case Management section of the Edit Profile and Sales Update pages

REFERENCE TABLES

Authorized administrative users can view, create and edit the fields and values custom field labels by clicking on Administration at the top of any page and then going to the Manage Reference Tables section.

The basic reference tables that can be maintained are:

Record - Lead Status
Record - Lead Score
Record - Lead Source
Record - Interest 1
Record - Interest 2
Record - Interest 3
Record - Interest 4
Record - Interest 5
Record - Interest 6
Record - Interest 7
Record - Vertical Industry
Record - Geography
Record - Interest 10
Record - Interest 11
Record - Custom 12
Record - Lead Sales Stage
Opportunity / Deal - Opportunity Type
Opportunity / Deal - Deal Sales Stage
Opportunity / Deal - Deal Status
Opportunity / Deal - Deal Miscellaneous Reference Tables
Opportunity / Deal - Solution
Opportunity / Deal Solution - Discounts
Opportunity / Deal Solution - Tax
Contact - Title Code
Contact - Function
Contact - State
Contact - Country
Appt / Call Back - Call /Task
Appt / Call Back -
Marketing Activity
Marketing Status
Case - Status
Case - Origin
Case - Priority
Case - Type

Case - Case Reason
Case - Close Reason
Case - Custom 1
Case - Custom 2
Case - Custom 3
Case - Custom 4
Quote - Custom 1
Quote - Custom 2
Quote - Custom 3
Quote - Custom 4
Quote - Custom 12
Admin Tables
Merge Fields Maintenance
Workgroup URL Mapping

These tables can be maintained for each workgroup within an individual database.

Reference Tables file maintenance is accessed by clicking on the **Administration** function in the top banner of the application and then selecting the hyperlink called **Manage Reference Tables**.

The following is an example of the Reference Tables file maintenance page:

Reference Table Management

[Add Record](#)
[Import](#)
[Help Guide](#)

Workgroup: AB - Jo 4 - LM 2017
 Current Label Set: AB - Joanna

Reference Table: Record - Marketing Mix
 Rows to Display: 25

Internal Value	Text Value	Sequence	Is Header
3	Direct Mail	19	No
5	Seminar	20	No
7	WEB/e-mail	21	No
1	Trade Show	22	No
2	Advertisement	23	No
4	Telemarketing	24	No
6	Referral	25	No
8	Call-In	26	No
9	Other	27	No

Page: 1 of 1

Select the Company/Workgroup (if you have access to multiple ones) and the Reference Table you want to modify. Additional entries can be add via the Add Record tab, Edited via the edit hyperlink or actually deleted via the delete hyperlink.

Each table has the ability for the user to sequence the order that the entries will appear in the page pull-down field.

Some tables as noted above store the code value and not the actual text value in the application DB. These are fields that traditionally were imported directly from Telemarketing firms and this cut down on the possibility of misspelling the text names. It also makes it possible to say change the text value in List Source without having to file maintain all of the values for that List Source Code.

User will not see any changes to these table values until they log into the application again because session variables including tables are set at logon time.

The names of the Reference Tables above can be renamed in the Custom Labels function by choosing the Label Group: **Manage Reference Tables**.

DOWNLOADABLE FIELDS

The Downloadable Fields function defines those fields that show up in the Custom Downloads feature of the Search Results page. This can be reached via the Administration function in the top banner of the application.

AVAILABLE IMPORT FIELDS

This function defines the list of fields available when doing a Record import or doing an append/fum.

SPECIAL INTEREST FIELDS

This page allows an Administrator to manage, disable and enable the 5 Special interest Sections and Fields.

DUPLICATE RECORDS

Find and Manage Duplicate Records allows an administrator to find and manage duplicate records.

Authorized administrative users can manage duplicate records by clicking on "Administration" at the top of any page and then clicking on the "Find and Manage Duplicate Records" link on the "Administration" page.

FIND AND MANAGE DUPLICATE RECORDS

From the "Administration" page, click on the "Find and Manage Duplicate Records" hyperlink to display the "Find and Manage Duplicate Records" page. From this page, you have the following options:

Find possible duplicate records based on the name of the company, matching on:

- the name of the company
- the name of the company and the email address of the primary contact
- the name of the company and the last name of the primary contact
- the name of the company and the first and last name of the primary contact

Find possible duplicate records based on the last name of the primary contact, matching on:

- the last name of the primary contact
- the last name and the email address of the primary contact
- the first and last name of the primary contact
- the first and last name and the email address of the primary contact

POSSIBLE DUPLICATE RECORDS

From the "Find and Manage Duplicate Records" page, select an option for finding duplicate records and click "Submit" to display the "Possible Duplicate Records" page.

This page lists the results from the search. From this page, you have the following options:

1. Click "Back to Record Selection" to display the "Find and Manage Duplicate Records" page.
2. Click on one of the "(All), A-Z" links to filter the results.
3. Enter the name of a company and click "Go" to filter the results by company name.
4. Enter the last name of a contact and click "Go" to filter the results by contact last name.
5. Click on the "view" link for a record in the list to display the "Manage Duplicate Records" page which lists the duplicate records.

MANAGE DUPLICATE RECORDS

From the "Possible Duplicate Records" page, click on the "view" link for a record in the list to display the "Manage Duplicate Records" page. This page lists the duplicate records. From this page, you have the following options:

1. Click "Back to Results" to display the "Possible Duplicate Records" page.
2. Check one or more records in the list and click "Merge Records" to merge the selected records.
3. Check one or more records in the list and click "Archive Record(s)" to archive the selected records.
4. Check one or more records in the list and click "Delete Record(s)" to delete the selected records.

MARKETING AUTOMATION AND WORKFLOW MANAGEMENT

Automation and Workflow Management supports the ability to create workflow processes that provide an automated response to changes to your accounts, contacts and leads.

Authorized administrative users can add, update and delete the workflow processes by clicking on Administration at the top of any page and then going to the Automation and Workflow Management section.

ACCESS PRIVILEGES

Only those users with appropriate administrative privileges can access this function to add, update and delete workflow processes.

Logon Management Page > Administration section > Access to Marketing Automation and Workflow

☒ Access to Marketing Automation And Workflow

AUTOMATION AND WORKFLOW MANAGEMENT

Business rules may be established to accomplish several functions or steps with one click action.

Using the Automation and Workflow Management tools, email templates can be used as an AutoResponder.

Used in conjunction with Call Stats and/or Profile Summary selections (Lead Status, Sales Stage, etc.) you can accomplish many tasks with the Automation and Workflow Management tools.

To provide you with examples and ideas there are several Workflow Process steps already established in your WorkGroup.

WORKFLOW APPLICATION TRIGGERS

Updating an existing record

Considered when a record is updated from the "Sales Update" or "Edit Record" pages; or when updating records or adding "Quick Actions" from the "Search Results" or "Accounts" pages; or when editing a custom form associated with a record.

Adding a new record

Considered when a record is added from the "Add New Record" page or via the "Web to Custom Form Mapping", "Email Parsing" or "Lead Provider" integration features.

Adding a new and updating an existing record

Considered when a record is added from the "Add New Record" page or via the "Web to Custom Form Mapping", "Email Parsing" or "Lead Provider" integration features; or when a record is updated from the "Sales Update" or "Edit Record" pages or when editing a custom form associated with a record; or when updating records or adding "Quick Actions" from the "Search Results" or "Accounts" pages.

Assigning a record

Considered when a record is manually assigned from the "Search Results", "Accounts" or "Edit Record" pages.

An email recipient opens an email message

Considered when the recipient of an email message opens that email message.

An email recipient clicks on a link in an email message

Considered when the recipient of an email message clicks on a link within the email message.

Adding a new opportunity / deal

Considered when a(n) opportunity / deal is added from the "Add Opportunity / Deal" page.

Updating an existing opportunity / deal

Considered when a(n) opportunity / deal is updated from the "Edit Opportunity / Deal" page.

Adding a new and updating an existing opportunity / deal

Considered when a(n) opportunity / deal is added from the "Add Opportunity / Deal" page; or when a(n) opportunity / deal is updated from the "Edit Opportunity / Deal" page.

Date Reminder - contact

Considered before/after a particular Date is reached using a Contact date field

Date Reminder - record

Considered before/after a particular Date is reached using a Record date field

Date Reminder - opportunity / deal

Considered before/after a particular Date is reached using an opportunity / deal date field

Date Reminder - meeting / event name

Considered before/after a particular Date is reached using a callback/event date field

Adding a new contact

Considered when a contact is added from the "Add Contact" page or Add a Contact option on a Record page.

Updating an existing contact

Considered when a(n) contact is updated from the "Edit Contact" page.

Adding a new and updating an existing contact

Considered when a contact is added from the "Add Contact" page or when a contact is updated from the "Edit Contact" page.

Adding a new marketing activity

Considered when a Case is added from the Case accordion or Add a Case option on a Record page.

Adding a new case

Considered when a Case is added from the Case accordion or Add a Case option on a Record page.

Updating an existing case

Considered when a Case is added from the Case accordion or Add a Case option on a Record page is updated; or when a Case is updated.

Adding a new and updating an existing case

Considered when a Case is updated.

Adding a new quote

Considered when a Quote is added.

Updating an existing quote

Considered when a Quote is updated.

Adding A New and Updating An Existing Quote

Considered when a Quote is added or updated.

Updating LEADDB Custom Field

Considered when a Record custom field is updated.

Updating OPPORTUNITY Custom Field

Considered when an Opportunity custom field is updated.

Updating CONTACT Custom Field

Considered when a Contact custom field is updated.

Updating Custom Form

Considered when a custom form is updated from the "Sales Update" or "Edit Record" or "My Custom View" pages.

ADDING AND EDITING A WORKFLOW

You may 'Add Workflow Rule' by clicking the '**Add New Rule**' button, or simply '**edit**' by clicking on the **pencil icon** beside an existing process.

To see the details of one of the Workflow Rules click on the **+** next to the name of the Workflow.

Marketing Automation / Business Rules - List

Add New Rule **Help Guide**

Priority	No.	Business Rule	Applies When	Last Updated	
❖	4543	Test	Updating an existing record	9/8/2020 4:59:05 AM - Joanna Hernandez	⏏ ⚙ Ⓞ ✕
❖	5038	Initial Prospecting	Updating an existing record	12/2/2022 11:31:42 AM - Joanna Hernandez	⏏ ⚙ Ⓞ ✕

Below you'll see the workflow 'Initial Prospecting' expanded to show the details.

There are three components to Workflow and Automation

- A condition that if true executes actions
- The actions that will result if the condition is true.
- Application Triggers defines when the workflow should fire and execute.

The Condition to be evaluated as either true or false is on the left. On the next column are one or more Resulting Actions and next to it is the Application Trigger.

5038

Initial Prospecting

Updating an existing record

12/2/2022 11:31:42 AM - Joanna Hernandez

</

In the 'Initial Prospecting' Workflow Process the condition that is being evaluated is when the 'Request Info' call stat is checked, then the condition is true and the actions will be performed.

In this case the actions to perform are:

Update the record 3 ways

1. The Lead Status will be updated to 'In Progress'
2. The Lead Score will be set to 'SUSPECT'
3. The Sales Stage will be set to 'Initial Prospecting'

A Callback Event will be added for tomorrow

1. The Event Name will be 'Follow-up'
2. The Type of Event will be 'Phone Follow-up'
3. The Start Time will be 'Tomorrow' and although it isn't shown here you are able to specify the exact time of the Event. It will be added to your calendar built into the CRM system.

NOTE: All of the values for Lead Status, Lead Value, Sales Stage etc. are user definable in the Reference Tables so you can set those values to whatever is required.

CUSTOM FORMS AND QUOTES

MANAGE CUSTOM FORMS

Custom Forms are forms that can be attached to a record to hold variable information. This is an extension of the basic application and allows for customization for your special requirements. One of the unique features of Custom Forms is that it allows for the "extension" of the application's basic search capabilities to many of the fields on the Custom Forms.

TYPES OF CUSTOM FORMS

Custom Forms are built via a unique tool that was developed for use with this application. This is only available to users that have Manage Custom Forms permission enabled for their logon.

Supplemental Form – can be attached to a profile when records are manually added to the application or any time after adding a record

Web Form – developed the same way as Supplemental Forms but can be made available for direct web input into the application database (via a special plug-in development tool or thru our post-to-form process)

Sales Form – developed the same way as Supplemental Forms but can be linked "in-line" into the Sales Update page (instead of just being an attachment via a pop-up this form appears as if it is part of the actual Sales Update page) and can be made variable by individual campaign.

Feedback Form – this form appears "in-line" at the end of the Sales Update page and can contain a series of questions regarding the lead (used for Sales Feedback purposes)

Opportunity Form – this form appears in the Sales Opportunity section of the Edit Profile and Record Update page and can be customized for a particular workgroup

Case Form – this form appears in the Case section of the Record page and can be customized for a particular workgroup.

Smart Form – this form appears in the Forms section of the Record. This form can be customized with HTML, CSS & JS. This form can also be linked "in-line" into the Record page.

Survey Form - developed the same way as Web Forms and designed to be used for the Survey Campaigns.

The Custom Forms page lists all the custom forms that are available for a particular workgroup.

Custom Forms / Surveys

Options

Workgroup: AB - Jo 4 - LM 2017							
ID	Form Name	Date Created	Last Updated	Edited By	Link	Required when Adding New Records	Form Type
4830	Sample Proposal 2	11/10/2022	11/10/2022	Joanna Hernandez	https://app4.crmtool.net/WebForm_HTML.asp?F=4830&W=23599	No	Smart
4827	Sample Proposal	10/27/2022	11/10/2022	Joanna Hernandez	https://app4.crmtool.net/WebForm_HTML.asp?F=4827&W=23599	No	Smart
4820	Smart - Inline	9/22/2022	11/6/2022	Joanna Hernandez	https://app4.crmtool.net/WebForm_HTML.asp?F=4820&W=23599	No	Smart (Inline)
4825	This is a Survey Form	10/19/2022	11/6/2022	Joanna Hernandez	https://app4.crmtool.net/webform.asp?F=4825&W=23599	No	Web (Survey)
4828	Opp Form New	10/28/2022	11/6/2022	Joanna Hernandez	https://app4.crmtool.net/webform.asp?F=4828&W=23599	No	Opportunity
4807	Web - Tabbed	5/6/2022	11/6/2022	Joanna Hernandez	https://app4.crmtool.net/webform.asp?F=4807&W=23599	No	Web
4377	Smart - Upload Files	1/24/2020	11/6/2022	Joanna Hernandez	https://app4.crmtool.net/WebForm_HTML.asp?F=4377&W=23599	No	Smart
3839	Case Test	10/3/2018	11/6/2022	Joanna Hernandez	https://app4.crmtool.net/webform.asp?F=3839&W=23599	No	Case
3479	123 Sales	2/5/2018	11/6/2022	Joanna Hernandez	https://app4.crmtool.net/webform.asp?F=3479&W=23599	No	Sales
4029	Notes and Journal - Feedback	5/24/2019	11/6/2022	Joanna Hernandez	https://app4.crmtool.net/webform.asp?F=4029&W=23599	No	Feedback
4815	Supplemental - Tab	8/31/2022	11/6/2022	Joanna Hernandez	https://app4.crmtool.net/WebForm_Tab.asp?F=4815&W=23599	No	Supplemental
3977	ORIG OPP FORM for OPP TYPE 1	4/8/2019	10/28/2022	Joanna Hernandez	https://app4.crmtool.net/webform.asp?F=3977&W=23599	No	Opportunity
4824	OPP TYPE 5 - ALL FIELDS - TABBED	10/18/2022	10/28/2022	Joanna Hernandez	https://app4.crmtool.net/webform.asp?F=4824&W=23599	No	Opportunity
4826	OPP TYPE 6 - ALL FIELDS - NON-TAB	10/21/2022	10/28/2022	Joanna Hernandez	https://app4.crmtool.net/webform.asp?F=4826&W=23599	No	Opportunity
4821	OPP FORM 2 for OPP TYPE 2	10/10/2022	10/18/2022	Joanna Hernandez	https://app4.crmtool.net/webform.asp?F=4821&W=23599	No	Opportunity
4823	Opp Form 4	10/10/2022	10/13/2022	Joanna Hernandez	https://app4.crmtool.net/webform.asp?F=4823&W=23599	No	Opportunity

If the user has access to more than one workgroup then the individual workgroups will appear in the Workgroup pull-down table.

Custom Forms / Surveys

Options

1 Create Custom Form

2 Create Survey

3 Import Custom Form

4 Manage Profile Fields

Workgroup: AB - Jo 4 - LM 2017				
		Date Created	Last Updated	Edited By
		11/10/2022	11/10/2022	Joanna Hernandez
4827	Sample Proposal	10/27/2022	11/10/2022	Joanna Hernandez
4820	Smart - Inline	9/22/2022	11/6/2022	Joanna Hernandez
4825	This is a Survey Form	10/19/2022	11/6/2022	Joanna Hernandez

- 1. Create Custom Form** - brings up the basic parameters page for defining a Custom Form.
- 2. Create Survey** - brings up the basic parameters page for defining a Survey Form.
- 3. Import Custom Form** - allows the user to import (copy) custom forms from another workgroup (if they have access to more than one workgroup).
- 4. Manage Profile Fields** - allows for the inclusion of some of the application standard fields on the Custom Form.

Editing Custom Forms

The Custom Form Edit screen is comprised of several different parameter fields that allow you to customize your Custom Form.

Form Name: max. 35 characters

Response Page: displayed after custom form is submitted

Available as an Attached Form: ☒ Yes ☐ No

Required when Adding New Records: ☐ Yes ☒ No

Show Print Button: ☐ Yes ☒ No

Automatic Numbering: ☐ Yes ☒ No

Update General Comments: ☒ Yes ☐ No

Survey Forms: ☐ Yes ☒ No

Display the record if the user is logged in: ☐ Yes ☒ No

Custom Form Theme:

Theme Style:

Date Format: Applies to web-enabled forms only

Section Style: Applies to web-enabled forms only

Default Section: Applies to web-enabled forms only

Form Type:

Custom Form Security

USER SELECTION - Custom form is accessible by all users or no users

☒ Make this custom form accessible by ALL users

☐ Remove access to this custom form from ALL users

USER SELECTION - Make this custom form accessible to specific users

Available Users:

- Me
- J -
- Jo ActMan 3
- Jo ActMan 4
- Jo Admin
- Jo Admin 3
- Jo Global3
- Jo Global H
- Jo Ill Hernandez

Add >>

<< Remove

Selected Users:

Update Information

Date Created: 8/8/2019 Last Updated: 8/8/2019 Updated By: Joanna Hernandez

Form name – name of Custom Form (can be modified after being created)

Response Page – this field can be used to enter a thank you page other than the system default. This can include a client hosted thank you page, or any other page the client wishes the form submitter to be directed to. By entering the form url itself client's can use this form as a web-based lead entry for their call centers or sales staff.

Available as an Attached Form – this setting allows specifies whether the form is available to be attached at the record or contact levels. If the form is not attached then data flows thru it into the record but does not allow the form to be edited once submitted. Having the form attached at either the record or contact level allows updates to be made by users and is very instrumental for use by Call Centers and Sales staff.

Required when Adding New Records – Enabling this setting means that when a user enters a lead manually via the “Add New Records” function that the form will be presented at the time of lead creation for the individual who entered the lead. Required fields on the Custom Form will be required to complete the lead creation.

Automatic Numbering – whether individual question should be numbered or not

Update General Comments – whether entire Custom Form should be written to the Campaign Survey/Responses field in the Lead Detail

Spell Check Textarea Fields – Enable/Disable automatic Spell Check on this custom form

Date Format – define data form to be used for form fields [mm/dd/yyyy or dd/mm/yyyy]

Form Type – designate whether a Custom Form is Supplemental, Web, Sales, Feedback or Sales Opportunity

Link Sales Form To: – if Custom Form type is Sales then what campaign/s it applies to

Link Feedback Form To: – if Custom Form type is Feedback then what campaign/s it applies to

The lower half of the Custom Form Edit Screen provides for the setting of individualized accessibility for the form. A form can be made accessible by all users or limited to selected users by selecting the appropriate access checkbox.

If the form is to be restricted to only certain users, then those users will have to be selected from the Available Users list and moved to the Selected Users list.

CUSTOM FORMS DESIGN PAGE

When clicking the “design” link on the Custom Forms List page for any custom form you will be taken to the design page. Here you will actually design how you want your Custom Form to look. Additionally, there are several other functions available to you here.

VARIOUS FORM NAVIGATION AND OPTIONS

The screenshot shows the Custom Forms Design Page interface. At the top, there are three tabs: "Custom Forms List", "Custom Forms Options" (which is active), and "Section Options". Below the tabs, on the left, are two input fields: "Form Background Color" with the value "#fff" and "Section Name" with the placeholder "Type A Section Name". To the right of these fields is a vertical list of options: "Preview Form", "Compile Form", "Save As", "Upload Logo", "Edit Profile Fields", and "Sync Mapped Fields". To the right of this list is another vertical list of options: "Add Section", "New Question", "Edit Section", "Copy/Import Question(s)", and "Import Responses".

CUSTOM FORMS LIST

Takes the user back to the Custom Form List Page

CUSTOM FORMS OPTIONS

Preview Form – this allows for viewing what the form will look like to the user

Compile Form – this compiles the form and makes it available for selection by the user. Forms should be developed and finalized before compiling them into a “production” mode (questions and answers should never be deleted from a compiled custom form once “live” data is input. If a question is no longer needed it should be deactivated. This allows the data to still be retrieved in the future but restricts the question from being viewed on the active form.)

Save Form As – this allows for the “cloning” of an existing form within the workgroup list of Custom Forms (when this feature is used the saved form will be in the un-compiled mode)

Upload Logo – allows for upload of a company logo to be used when displaying the Custom form

Edit Profile Fields – allows for inclusion of basic fields on the Custom Form

Sync Mapped Fields

SECTION OPTIONS

Add Section – this allows for the creation of sections within the custom form (see below)

New Question

Edit Question













Copy/Import Questions– allows for copying and importing questions from other custom forms into an existing custom form

Import Responses– allows for importing of responses into radio or multiple choice type questions [file must be one column of responses and be in .txt format]

Custom Forms Field Types

Questions can be added to a section by clicking on the “New Question” link for that section. There are several different types of questions that you can create. Next to each question type is an example of what the field looks like.

Choose a question type by clicking on the type of response that you want for the question.

1  Label	2  Text	3  Text (encrypted)	4  Textarea
5  Radio	6  Checkbox	7  Single Select	8  Multiple Select
9  Summed Question	10  File Upload	11  Rating an Item	12  Company/Contact Link

CANCEL

1. Label – This allows for setting up the display of a text value label [no input values will be associated with it]
2. Text – basic text field
3. Text (Encrypted)
4. Textarea – field for input of large amount of text (user can defined size of field and box)
5. Radio – for use where user will select one response
6. Checkbox – for user where user can select more than one response
7. Single Select – pull-down box where user select one table entry
8. Multiple Select – pull-down box where user can select multiple table entries (by holding down the CTRL and SHIFT key)
9. Summed Question – this allows for the setup numeric values with an automatic total field (fields are set up as Sub Questions):
10. File Upload – Allows the submitter to upload a file while filling out a Custom Form. This file will be attached to the Custom Form
11. Rating an Item
12. Company/Contact Link

NOTE: You will need to ensure that Custom Forms are accessible as being Available as an attached form and the Custom Forms section will need to be enabled on the Edit Profile page of records.

Checkboxes should be used whenever possible for multiple responses type questions versus a Multiple Select type field because a user may “wipe out” multiple responses by clicking on one entry while not using the CTRL or SHIFT key.

To select a particular type of field the user clicks on the field name hyperlink and a pop-up page will allow for the setting up of the parameters for that fields type.

Form Field Type Options

The following is a sample page that has been filled in for a Checkbox type field:

Section:

Question:

☐ Deactivate this question for data collection

Type: (FieldIndex = n/a)

☐ Display as a link in custom reports

Number of Columns:

Required: ☐ Yes ☒ No

Read Only: ☐ Yes ☒ No

Order:

Map to Field:

Update field when form is added to record?: ☐

Section – defines what Section that this field belongs to

Question – Question or field tag to be displayed with this field

Deactivate – Once a Custom Form is compiled and is being used for data collection a field can be “deactivated” (Question or field tag as well as answers will be grayed out on the Custom Form and further editing will be turned off)

Type – Such as Checkbox, Text, Radio, etc

Number of Columns – the number of columns that will be used to display the answers for this particular field

Required – whether this is to be a required field on the Custom Form (marked with a check and requiring entry in this field for the Custom Form to be submitted)

Read Only – remove update capability on this individual field

Order – order of this field within the section

Map to Field - Custom Form fields can also be mapped directly to key fields within the SQL database (this requires technical knowledge of the actual SQL DB field names)

The following is the design page for a basic Supplemental form showing a Main Section header and a sample of the different kinds of fields that can be created with a Custom Form.

All Field Types

Section 1 +

Label Field

Text (encrypted)

Text Field

Textarea

Radio

☐ Radio 1

☐ Radio 2

☐ Radio 3

Single Select

To edit an item in list, select the item and then click on **Edit**

--- Please Select ---

Summed Question

Lodging

Food

Gas

TOTAL

Checkbox

☐ Checkbox 1

☐ Checkbox 2

☐ Checkbox 3

Multiple Select

To edit an item in list, select the item and then click on **Edit**

One Two Three

File Upload

Company/Contact Link

Rate this Article

	Helpful	Very Helpful	Irrelevant
Accuracy of Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Relevance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coverage and Details	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Date Created: 11/27/2022 Date Created: 11/27/2022 Date Created: Joanna Hernandez

For those field types that have responses these can be added by clicking on the Add Response hyperlink next to each field question/field tag. This will pop-up a definition page as follows (example is for the Checkbox field above):

Display Value:

Internal Value:

☐ Deactivate this answer for data collection

Is Header ☐

Set as Default: ☐ Yes ☒ No

Order:

Go To:

Add another response: ☒

When Selected, Require:

Display Value - response value that is displayed on the Custom Form

Internal Value - response value that is stored internally in the DB field (this is for use in scripting where a unique answer such as "Phase/Definition" may be desired versus just "Definition")

Deactivate answer – this will gray out a particular answer on the Custom Form and allow for display of prior selection of this answer but will not allow further selection or editing of this answer

Set as Default – ability to set this value as the default value

Order - sequential order of this field within the response for this question/field tag

Add another response – this allows you to bring up another blank Add Response page when you click on Submit instead of having to go back to the custom form and click on the Add Response hyperlink again.

Editing of existing answers can be edited by clicking on the individual answer (or in the case of Single or Multiple select on the edit hyperlink next to the answer).

PROFILE FIELDS

The Custom Forms contain an additional tab called Edit Profile Fields that allows for the inclusion of some of the application standard fields on the Custom Form.

One of the functions of Profile Fields is to allow a default value to be entered for a field and primarily used with Web type Custom Forms tied to Landing Pages.

In the example below, the field Campaign ID and Initial Lead Grade would be included but hidden on the Custom Form. A value of "CP-1343" would be written to the Campaign ID field which is the internal value for Campaign 1 and "WARM" in the Initial Lead Grade field.

LEADMASTER AB - Jo Hernandez

Home Contacts Deals Reports Library Add Records & Leads Campaigns Calendar Admin

Profile Fields

Active	Field Label	Field Order	Required	Is Hidden	Default Value
<input checked="" type="checkbox"/>	Campaign	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CP-1343
<input checked="" type="checkbox"/>	Initial Grade	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	WARM
<input type="checkbox"/>	Country	1	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Interest16	2	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Alt Phone	3	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Web Address	4	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	# Employees	5	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	# Sales Reps	6	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Lead Value	7	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Current Lead Status	8	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Interest1	11	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Organization	12	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Interest2	13	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Sales Revenue	14	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Interest3	16	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Account Manager	17	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Marketing Mix	18	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Partner Rep	19	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Business Partner	20	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Record ID	21	<input type="checkbox"/>	<input type="checkbox"/>	

This is the filled-out Web Form:

Web Form

★ Indicates Required Field

▼

Name

Email

ID

Currency
 Valid Range From \$10 To \$10000

Numeric

Upload File - Attached To Record [Add/Edit Attachments](#)

And below is how the Record looks like when the web form is submitted:

0 DAYS OLD INITIAL PROSPECTING QUALIFIED / APPT SCHEDULED APPROVED BUDGET PROPOSAL SUBMITTED

Company
 Contact [Test Name](#) Phone
 Record - ☐ Value 1 ☐ Value 2 Email [email@test.com](#)
 Checkbox ☐ Value 3 ☐ Value 4

Campaign [Campaign 1](#)

Showing Lead Sales Stage
 ★ Single Select --- Please Select --
 ★ Single Select 2 --- Please Select --

> Primary Contact Information - Test Name

> Additional Contacts

> Custom Links

> Sales Rep Comments/Notes

> Special Interest III

▼ Profile Summary

Initial Lead Grade **WARM**

Lead Value

Lead Sales Stage

Lead Source

Forecast Date

Marketing Mix

Probability

Date

Export Status

Export Date

MAP WEB FORMS TO CUSTOM FORMS

Custom Form to Web Form Mapping provides the ability to map a custom form to an existing web form. A mapped web form can then be modified to post data directly into the custom form. With this feature, a web site administrator can maintain their existing web forms and not replace them with custom forms.


OVERALL PROCESS

1. The administrator maps a custom form to an existing web form. Once a custom form is mapped to the web form, the mapping provides additional code and html and instructions for modifying the existing web form to post data directly to the mapped custom form.
2. The web site administrator modifies and deploys the updated web form.
3. Web site visitors display and enter data into the existing web form and the data posts directly into the custom form. A record is created and the custom form is attached to the record.

SETTING UP THE CUSTOM FORM

It is important that you build a custom form that matches the targeted web form to be mapped. For example, here's a custom form named **Sample Web Form Landing Page**.

Sample Web Form Landing Page

Record Details + 

Date Today (Mapped to Entered) **Set Default**

Company (Mapped to Company) **Set Default**

First Name (Mapped to First Name) **Set Default**

Last Name (Mapped to Last Name) **Set Default**

Phone Number (Mapped to Phone) **Set Default**

Email Address (Mapped to Email) **Set Default**

Comments (Mapped to Sales Comment) **Set Default**

Be sure to 'Compile' your landing page, otherwise it won't be available to the *Web Form to Custom Form Mapping* tool. You may confirm that your page is compiled from the **Custom Forms List Page**.

CONFIGURING A CUSTOM FORM TO WEB FORM MAPPING

1. Once your Custom Form has been created and compiled, you may now go to the **Administration page** and click on the "**Custom Form to Web Form Mappings**" link to display the list of mapped custom forms.
2. Click "New Custom Form to Web Form Mapping" to create a new custom form to web form mapping.

Name	<input type="text" value="Sample Web Form"/>
Description	<input type="text" value="Sample Web Form"/>
Response URL	<input type="text" value="http://leadmastercrmkb.com"/>

- a. Provide name (arbitrary)
- b. Provide description
- c. Insert a valid web location, which will be displayed after the user clicks the 'Submit' button (required). This will typically be a "Thank You" page or the web page that you want presented after the user submits their form.

3. Next, select the Custom Form that you have built to receive the mapped fields

Web Form to New Lead Map - Selecting a Custom Form

[Help Guide](#)

As an option, you can select to include fields from a custom form to map fields from your web form to. When you have finished, click [Next >>] to continue.

Custom Form:

4. After selecting the custom form, click Next to display the "**Matching Fields**". To map the fields of the Landing Page / Web Form enter the field names one at a time click the Add button after typing each name.
5. Select the Web form field and the matching Custom form field and click Add> to identify those as 'Matched Fields' and add them to the list of Matched Fields.

Now, please add fields from the web form and match these fields with demographic fields and fields in the custom form. When you have finished, click [Next >>] to continue.

Web Form Fields	Fields	Matched Fields
	Email Contact Method Company Revenue Employee Size Campaign Contact Fields Birthday Field Custom Form Fields Date Today Company First Name Last Name Phone Number Email Address Comments	company - Company firstname - First Name lastname - Last Name email - Email Address phone - Phone Number message - Comments

Add
Enter the web form field name here and click 'Add'.

LANDING PAGE CODE INSERTION

Once the fields have been mapped, the system generates Directions and Code for adding HTML to the web form / landing page. The code produced can be seen in the example below.

Web Form to New Lead Map - Completed

Help Guide

Your web form has been mapped to the custom form: **Sample Web Form Landing Page**

To complete the integration between your web form and a new lead, please make the following changes to the html for your web form:

1. Add the following text following the <head> element:

```
<script type="text/javascript" src="https://util1.crmtool.net/lm_wfi.js"></script>
```
2. Add the following text to the <body> element:

```
onLoad="lm_InitWebForm()"
```
3. Add the following text to the <form> element:

```
onSubmit="return lm_SubmitWebForm()"
```
4. Add the following text immediately following the <form> element:

```
<input type='hidden' name='lm_CompanyID' value='23599'>
<input type='hidden' name='lm_FormID' value='4832'>
<input type='hidden' name='lm_MappingID' value='120'>
<input type='hidden' name='lm_FormKey' value=''>
<input type='hidden' name='lm_FormResponsePage' value='http://leadmastercrmkb.com'>
```

Example:

```
<html>
<head>
<script type="text/javascript" src="https://util1.crmtool.net/lm_wfi.js"></script>
</head>
<body onload="lm_InitWebForm()">
<form name="frm" method="post" onSubmit="return lm_SubmitWebForm()">
<input type='hidden' name='lm_CompanyID' value='23599'>
<input type='hidden' name='lm_FormID' value='4832'>
<input type='hidden' name='lm_MappingID' value='120'>
<input type='hidden' name='lm_FormKey' value=''>
<input type='hidden' name='lm_FormResponsePage' value='http://leadmastercrmkb.com'>
</form>
</body>
</html>
```

This page contains the instructions for modifying the existing web form to post directly into the custom form. There are 3 simple modifications (**in blue**) that need to be made to the existing web form.

Just copy and paste the code into your landing page to have the data from the fields in the landing page flow into your WorkGroup.

You can map hidden fields in the landing page to the custom form and database fields if desired. This is useful for keeping track of how visitors arrived at your site and into your database.

For example, if you want to associate this landing page with a particular campaign can have a hidden field mapped to the custom form which can be mapped to the campaign field in the database.

You can also assign data to the custom form directly. This is especially useful if you're using the same landing page for multiple campaigns.

To assign a custom form to a campaign click on Administration > Custom Forms. Select the custom form you want to work with and click Design. Click on **Custom Form Options** then select '**Edit Profile Fields.**'

Profile Fields

SUBMIT << Back

Active	Field Label	Field Order	Required	Is Hidden	Default Value
<input checked="" type="checkbox"/>	Campaign	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sample Landing Page
<input type="checkbox"/>	Country	1	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Interest16	2	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Alt Phone	3	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Web Address	4	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	# Employees	5	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	# Sales Reps	6	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Lead Value	7	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Current Lead Status	8	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Initial Grade	9	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Interest1	11	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Organization	12	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Interest2	13	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Sales Revenue	14	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Interest3	16	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Account Manager	17	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Marketing Mix	18	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Partner Rep	19	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Business Partner	20	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Record ID	21	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	First Name	22	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Last Name	23	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Title	24	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Company	25	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Address	26	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Address2	27	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	City	28	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	State	29	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Zip Code	30	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Telephone	31	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Fax	32	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Email	33	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Lead Source	34	<input type="checkbox"/>	<input type="checkbox"/>	

CUSTOMIZE QUOTE SETTINGS

Quote Settings allows an administrator to configure settings for quotes.

Authorized administrative users can manage quote settings by clicking on "Administration" at the top of any page and then clicking on the "Quote Settings" link on the "Administration" page.

ENABLING THE QUOTE SYSTEM

In order for the Quote system to be available to the user it must be enabled at the WorkGroup level, the User level and activated in Customize Pages.

Here's where you'll find it in **Workgroup Management Page**.

♥ Mobile, Quotes, Cases, Mortgage POS	
Mobile Access	Enabled ▼
Track Mobile Location	Disabled ▼
Mobile Tracking Frequency	15 minutes ▼
Mobile Tracking Storage Duration	2 weeks ▼
Access To Case Management	Enabled ▼ ⓘ * Access to case management automatically have case management reports.
Case Assignment Access To	Default ▼
Access To Quotes	Enabled ▼
Change Case Status When Closed	Enabled ▼ ⓘ
Mortgage POS	▼

Here's where you'll find it in the Viewing / Editing Records section of **Logon Management** for individual users:

+ Viewing / Editing Records

- ☒ Access to "Sales Update" page ⓘ
- ☒ Access to "Edit Profile" page ⓘ
- ☒ Access to "Review And Take Action" page ⓘ
- ☒ Show Custom Forms Section ⓘ
- ☒ Show Attached Files Section ⓘ
- ☐ Show Profile Summary Section ⓘ
- ☒ Show Record Quick Actions - 1 Section ⓘ
- ☒ Show Record Shortcuts Section ⓘ
- ☒ Show Record One Click Actions 3 Section ⓘ
- ☐ Bypass Mandatory Quick Actions Update ⓘ
- ☒ Show Opportunities Section ⓘ
- ☒ Show Callbacks / Events Section ⓘ
- ☒ Show Background Information Section ⓘ
- ☐ Allow Add of Background Information ⓘ
- ☒ Edit Background Information ⓘ
- ☒ Show Cases Section ⓘ
- ☒ **Show Quotes Section ⓘ**
- ☒ Create Proposals ⓘ
- ☒ Add / Edit Contacts ⓘ

You'll also need to make sure there's a checkbox in the **Quotes** section on the **Record Customize Pages**.

✖ Export Date								
✚	Sales Opportunity							
	ID	Opportunity Name	Status 🔍	Forecast Date	Sales Stage	Total Opportunity Value		
	Define Summary Section View							
✚	Sales Form							
	Quote							
		Quote Name	Quote Number	Quote Date	Total	Updated		
✚	Attached Files							
		Date Uploaded	Document Name			Size		
✚	Supplemental Information							
✚	Case							
	Case Number	Subject/Summary	Date/Time Opened		Case Priority 🔍	Status 🔍		
✚	Special Interest							
	✚ Confirmed Appointment 🔍	✚ Interest 3 🔍	✚ Interest 5 🔍					
	✚ Interest 2 🔍	✚ Interest 4 🔍	✚ Interest 6 🔍					

QUOTE SETTINGS

From the "Administration" page, click on the "Quote Settings" hyperlink to display the "Quote Settings" page. From this page, you have the following options:

Quote Settings

[Add Quote Template](#)
[Help Guide](#)

Quote Settings

Company Name	<input type="text" value="LeadMaster"/>	
Address 1	<input type="text"/>	
Address 2	<input type="text"/>	
City, State/Prov	<input type="text"/>	<input type="text"/>
Zip/Postal Code	<input type="text"/>	<input type="text"/>
Logo	<input type="text" value="red square.jpg"/>	Upload Logo View Logo
Comments	<input type="text"/>	
	(max. 5000 characters)	
Terms	<input type="text"/>	
	(max. 5000 characters)	
Fixed Terms	<input type="checkbox"/>	
Default Quote Template - Header Background Color	<input type="text"/>	color palette
Default Quote Template - Header Font Color	<input type="text"/>	color palette

1. Enter information about your company. This information is available to display on the pdf-generated quote.
2. Click "Upload Logo" to upload a logo image. This logo is available to display on the pdf-generated quote.
3. Click "View Logo" to view the current logo image.
4. Enter comments and terms. This information is available to display on the pdf-generated quote.
5. If you would like for the terms to be fixed (meaning users creating quotes cannot update the terms), check "Fixed Terms"
6. You have an available default quote template to use to create a pdf-generated quote.
7. You can specify the header and header font colors.

QUOTE TEMPLATES

You have an available default quote template to use to create a pdf-generated quote. As an alternative, you can create one or more quote templates to use instead of the default quote template. Users creating pdf-generated quotes can choose from among the available quote templates.

Click **'Add Quote Template'** to add a new quote template. From the **"Add Quote Template"** page, you have the following options:

1. To make the quote template available for users to use when creating pdf-generated quotes, set the status to "Active".
2. Enter the name, optional description and the order of the template.
3. Using the editor, design the content of the template.
4. Within the content of the quote template, you can include the following categories of information (filled in when creating pdf-generated quote):
 - Date
 - Contact
 - Sales/Marketing
 - Company
 - User Fields
 - Assignment
 - User Information
 - Quote Information
5. The "Quote Information" category includes the following fields:
 - Quote Name
 - Quote Number
 - Quote Date
 - Comments
 - Terms
 - Quote Discount
 - Quote Taxable
 - Quote Tax Rate
 - Quote Line Items
 - Company information
 - Logo
6. Click "Submit" to save changes to the quote template or "Cancel" to return to the "Quote Settings" page without saving changes made to the quote template.

In addition to Quote information, you can also include contact information, sales, company, user fields and more.

Once you've got your templates set up are you are ready to use the quote generator. If you are familiar with the opportunity management system the quote generator operates in a similar fashion.

You access the quote generator from the Record Update / Sales update page.

ADVANCED CUSTOMIZATION OPTIONS

WEB LINKS MANAGEMENT

Web links support integration between your database(s) and other web-based applications such as Google, Yahoo, Hoover's and MapQuest.

Authorized administrative users can add, update and delete the web links that display on the Record Update page for a record by clicking on Administration at the top of any page and then going to the Manage Web Links section.

To add, update or delete web links, click on Administration at the top of any page and then click on Manage Web Links to display the existing web links.

ADD A NEW WEB LINK

To add a web link, click on the orange Add Record tab above the Web Link List. Select the type of web link, enter the label, description and web link and click Submit.

Add Web Link

[Web Link List](#)
[Help Guide](#)
[Upload Image](#)

Web Link Information

★ Label

Description

Standard Web Links

Link

▼

Web Link

Insert Field

▼

★ Web Link

SUBMIT

Cancel

Required Fields

When adding a web link, the type, label and web link fields are required.

Standard Web Links

Standard web links are pre-defined web links for common, web-based applications including Google, Yahoo, Hoover's and MapQuest. Simply elect one of these standard web links and the system will populate the Web Link field below with the appropriate code; no additional changes are needed for the web link.

Insert Field

To add a custom web link, enter the appropriate code in the Web Link field. You can add elements to the link that will be populated with information from the Record by selecting the relevant field from the Insert Field pick list. The list of fields includes all of the available fields from the Record.

If you select one of the fields from this list, you can see the format for the placeholder in the web link. For instance, selecting Company adds the following to the web link: {!Company}. When the web link is displayed on the Record Update page, the {!Company} placeholder is replaced with the name of the company from the Record.

UPDATE AN EXISTING WEB LINK

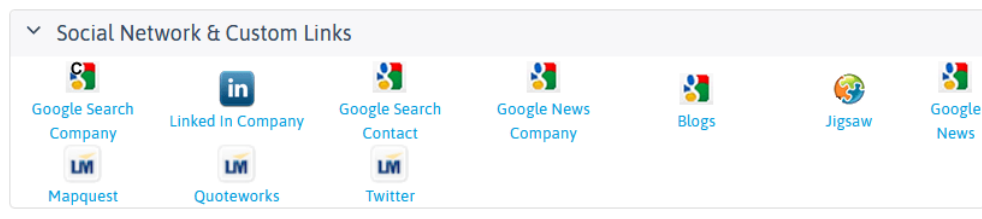
To update an existing web link, click on the edit hyperlink to the right of that web link on the main Web Link List page. Enter any changes to information for the web link and click Submit to save changes.

DELETE AN EXISTING WEB LINK

To delete an existing web link, click on the delete hyperlink to the right of that web link on the main Web Link List page. You will be asked to confirm that you want to delete this web link. If yes, click OK. If not, click Cancel.

RECORD UPDATE PAGE

If you have defined any web links, the Record Update page will include a Custom Links section. Clicking on the link(s) in this section will open a new browser window for the link.



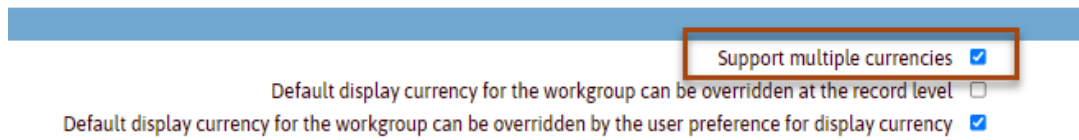
CURRENCY SUPPORT

For International deployments when currency other than the US Dollar is required, you have the ability to change or add currency support, including multi-currency support.

CONFIGURING SUPPORT FOR MULTIPLE CURRENCIES

From the "Administration" page, click on the "Currency Support" link to display currency support pages.

Each workgroup by default does not support multiple currencies and lists only the US dollar as the supported currency. To change simply 'edit' the existing state, or for multi-currency simply check the box 'Support multiple currencies' and the following page will be displayed.



Support multiple currencies ☒

Default display currency for the workgroup can be overridden at the record level ☐

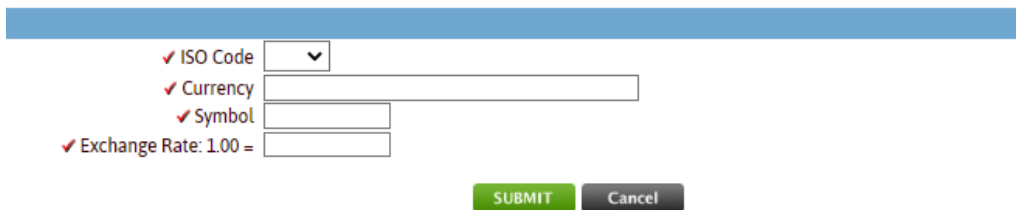
Default display currency for the workgroup can be overridden by the user preference for display currency ☒

When multiple currencies are supported for the workgroup, the following options are available to the administrator:

- The ability to add additional supported currencies for the workgroup.
- The ability to allow the default display currency for the workgroup to be overridden at the record level.
- The ability to allow the default display currency for the workgroup to be overridden by the user preference for display currency.
- The ability to set the base currency for the workgroup
- The ability to set the default display currency for the workgroup

ADDING SUPPORT FOR ADDITIONAL CURRENCIES

To add additional supported currencies, click on the **'Add Currency'** tab.



✓ ISO Code

✓ Currency

✓ Symbol

✓ Exchange Rate: 1.00 =

A supported currency includes the following detail:

- The ISO Code for the currency.
- A long name for the supported currency.
- The symbol (e.g. \$) for the supported currency.
- The exchange rate (relative to the base currency) for the supported currency.

Currently, the following currencies are supported (support for additional currencies can be added as needed):

- Australian dollar
- Canadian dollar
- Euro
- Hong Kong dollar
- US dollar

HOW CURRENCY VALUES ARE STORED AND DISPLAYED

Currency values are stored in the base currency for the workgroup

For records and opportunities, the currency values are displayed in the default display currency for the workgroup unless:

- If the administrator has configured currency support to allow the default display currency for the workgroup to be overridden at the record level the currency values for the record and associated opportunities are displayed based on the currency associated with the record.
- If the administrator has configured currency support to allow the default display currency for the workgroup to be overridden by user preference for display currency AND the display currency has not been set at the record level, the currency values for the record and associated opportunities are displayed based on the user preference for default display currency.

Marketing and Opportunity Reports, Custom Reports and Dashboard Charts display currency values in the default display currency for the workgroup unless the administrator has configured currency support to allow the default display currency for the workgroup to be overridden by user preference for display currency. In this case, the currency values are displayed based on the user preference for default display currency.