

Solutions Group by LeadMaster



LEADMASTER CRM USER GUIDE

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LEADMASTER CRM

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

LOGGING IN

Visit www.leadmaster.com, and click **Logon** top menu to log in to the CRM.

What's New

- For our users of the 1998 version (Classic) and the 2009 version (APP) please [click here](#) to read an important announcement.
- Effective June 6, 2020 a new security feature has been added to the Zapier integration. All Zapier users will be required to enable a logon management privilege to access LeadMaster using Zapier. Please contact your LeadMaster representative for further information.
- New Email Report for APP4. [Click](#)

LEADMASTER
Exceed Your Goals

User Name

Password

SUBMIT

Sign-in Help

HOMEPAGE

Once logged in, you will be taken to the main **Dashboard** or **Information Center** screen. From this screen, you will see: shortcuts to your leads (for users at the Account Manager level); messages about using the system, campaign updates and special news; and an event tracker highlighting important dates to remember. You can always return to this screen from anywhere in the application by clicking on the Home button in the top navigation bar.

The screenshot shows the 'User Settings' page with the following options:

- Banner:** White Banner Background
- Default Tab on Home Page:** Info Center Action Hub My Dashboard Activity Feed
- Default Page:** Clicking on the 'Company' hyperlink from search results, accounts and reports takes you to:
 - View Profile
 - Sales Update
 - Edit Profile
 - Review And Take Action
- Contact to Record:**
- Display Checkbox to Add Sales Rep Comments/Notes:** **Show Preview Pages:**
- Message Ticker:** **Show Left Menu:**
- Left Menu Options:** Account View/Accordian
- Add Me to Bcc:**
- Display New Record:**
- 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: EUR

Note: You can select the homepage you want displayed by going to User Settings > Other Settings Tab > Default Tab on Homepage

INFORMATION CENTER

Allows you to have a web page within the LeadMaster application. Some uses include: links to training videos, links to web forms for entering data, web applications in an iframe, content status page etc. The system supports multiple Info Centers.

DASHBOARD

Are real-time representations of the data in your system. You can create dashboards three ways, from a list of pre-configured reports in the dashboard management area, by running a report and charting the results and by charting search results.

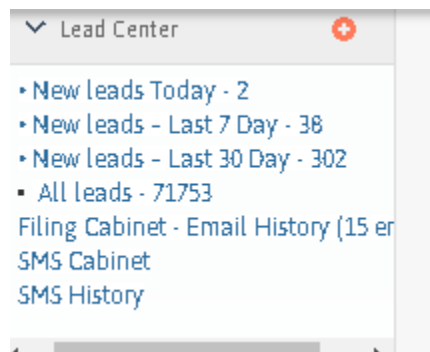
As data changes in the system the charts are automatically updated. Clicking on a chart takes you to the associated data.

WORKING YOUR LEADS

1. LEAD CENTER

To start working on your leads, click on one of the homepage shortcuts – the Lead Center. This provides convenient access to assigned leads, leads entered today, in the last week, in the last 30 days and all leads.

The Lead Center also provides access to the filing cabinet (emails not matched with a contact from the Outlook Sync product), the SMS cabinet (SMS messages not matches with a mobile phone number) and the SMS history.






2. SEARCH FOR ASSIGNED RECORDS OR LEADS

Account Managers can retrieve a full listing of all leads assigned to them (including new leads and leads that were previously updated) by:

1. **Quick Search** – allows users to search records that you are authorized to view. The fields available in the Quick Search are configurable.
2. **Find Match** - allows you to search records that you may not have access to but would like to know if they are in the system.
3. **Advanced Search** - clicking the Search button in the upper right-hand corner of the screen and then clicking the Go button. For more specific results, enter the appropriate search criteria in the search screen. The Search function queries on all primary records as well as additional contacts attached to those records.

Search Results

Entered	Company	State	Contact	Contacts	Phone	Acct. Rep.	Opps	Lead Status	Campaign
<input type="checkbox"/> 10/27/2019	Company 1		Last, First		9293565063	AB-Jo 5 Admi		Pre-Litigati	None
<input type="checkbox"/> 10/26/2019	Company 1		Last, First		9293565063	AB-Jo 5 Admi			None
<input type="checkbox"/> 10/7/2019	Select Record		adg, dv			None			None

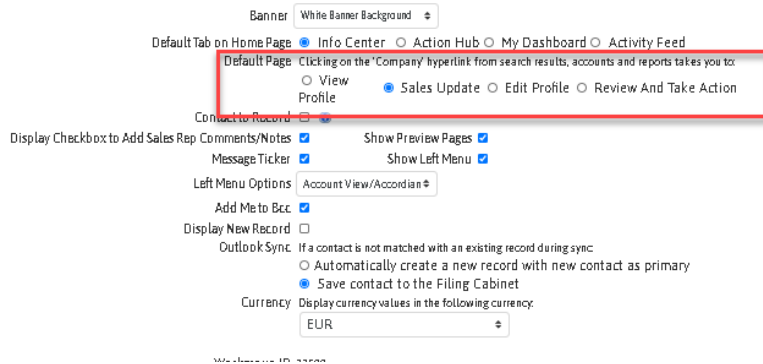
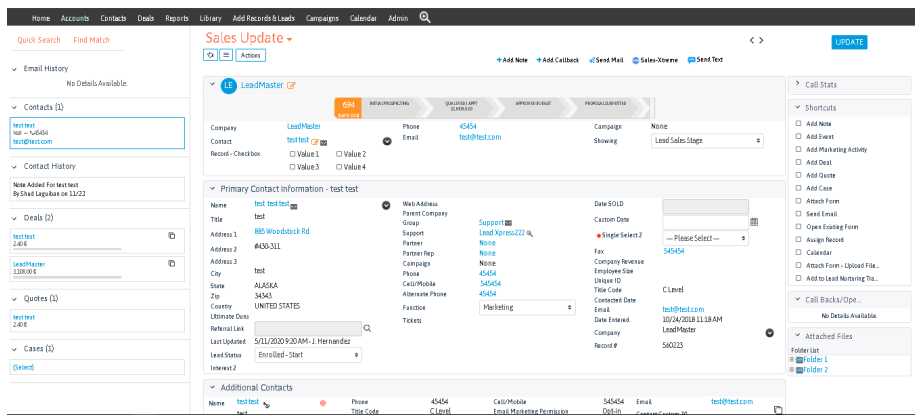
Note: Access to Find Match and access to records through find match is determined by your user configuration.

3. REVIEW EACH LEAD

To review all the leads in your account, use Search and work your leads one by one. You can also use the Report Filter tab in the Search Results to review Lead Aging and Call Backs or to track your Forecast. See below for additional details on using the Forecast and Call Back Reports.

From the Search Results, click on the Company Name to view the record profile.

Note: You can select the default Record page by going to User Settings > Other Settings Tab > Default Page

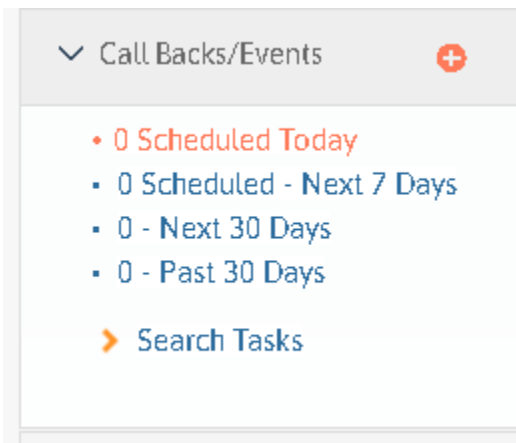


4. UPDATE LEADS

On the Sales Update page, you can update the Sales Progress, Sales Reminder and Comments areas. Don't forget to click on the Submit button to save your updates to the record. The system will automatically date stamp your Comments. By carefully updating each field, you can help ensure that progress on the record is accurately recorded and that real-time updates are available to your team.

5. USING THE CALL BACK HYPERLINK AND CALL BACK REPORT

The number of call backs that you have entered for yourself for the current day appears on your Homepage Callbacks and Events shortcut when you log in. Simply click on **Scheduled Today** hyperlink on the accordion to display a list of these records.



If you wish to review past due and future call-backs as well as those for the current day, use the full Call Back Report by clicking on Reports at the top of any screen and selecting the Call Back Report from the drop-down list. It is important to note that only those call backs that you enter yourself when logged into your own account will show up on your call back reports. Other users cannot enter call backs for you on your behalf.

PERFORMING SEARCHES

QUICK SEARCH

Accessible from on the homepage. The Quick Search function allows you to search records that you are authorized to view. The fields available in the Quick Search are configurable.

Quick Search	Find Match
Company	Opportunity Nam
First Name	Last Name
Phone	Email
City	State
Zip	Unique ID
Address 1	Campaign
Quote Number	Quote Name
ID	Case Number
Subject/Summary	GO

ADVANCED SEARCH

ADVANCED SEARCH

Demographic Search - Select any single criteria or any combination of multiple criteria and click on Go. To select multiple items, hold down the Control key (PC) or Command key (Mac) as you highlight your selections.

Or simply click the magnifying glass icon beside the field selection.

The screenshot shows the 'Demographic' search section. On the left, there is a list of search criteria with a magnifying glass icon next to each. On the right, there is a grid of search fields with a magnifying glass icon next to each. The criteria include: Parent Company, Company, First Name, Last Name, Title, City, Zip, Email, Phone, Company Revenue, Employee Size, Probability, Lead Value, SIC Code Range, Keyword Search, Number Of Call Attempts, Number Of Dials, Date Last Called, Date Last Called Range, Web Address, and Referral Link. The search fields include: Title Code, Function, Metro Area, State, Country, Lead Status, Lead Sales Stage, Campaign, Forecast Date, Initial Lead Grade, and Lead Source. A 'SEARCH' button is located at the bottom right.

Display all records - To display all the records available in your account click on Go without specifying any criteria.

Query Sort Preferences – Select sort preferences at the bottom of the Search screen before clicking on Go.

The screenshot shows the 'Sort Preference' section. It contains three dropdown menus, each with a 'None' option and radio buttons for 'Ascending' and 'Descending'. The first dropdown is set to 'None' with 'Ascending' selected. The second dropdown is set to 'None' with 'Ascending' selected. The third dropdown is set to 'None' with 'Ascending' selected.

Search by Account Manager – or other Assignment category to display records by Account Manager or Region before clicking Go.

The screenshot shows the 'Assignment' section. It contains four dropdown menus, each with a magnifying glass icon next to it. The dropdowns are labeled: Group, Support, Partner, and Partner Rep.

Advanced searches – the sample Search screen shown on the previous page is typical for most account managers. However, depending on your access privileges you may not see the lead assignment search area shown above. In addition, the Special Interest search is only displayed for those databases with the Special Interest fields turned on. Alternately, if you have advanced access privileges, you may have access to additional functions on the search screen, including:

- a. **CRM Management:** Search by a specific date or date range for fields such as call-back date, date entered, date updated and date contacted as well as other marketing parameters such as lead source and marketing mix.

The screenshot shows the 'CRM Management' search interface. It is divided into two columns of filters. The left column includes: Unique ID, Ultimate Duns, Tickets, Date Entered, Date Entered Range, Date Assigned To, Date Assigned, Date Assigned Range, Contacted Date, Contacted Date Range, Last Updated, Last Updated Range, Close Date, Close Date Range, Call Back/Event Date, Call Back/Event Date Range, Event Status, Type, and Event Type 2. The right column includes: Record No., Marketing Mix, Marketing Activity, Marketing Status, Marketing Activity Date, Marketing Activity Date Range, Email Marketing Permission, Calling Permission, Email Message Sent Date, Email Message Sent Date Range, Smart Queue, and Smart Queue Status. Each filter typically consists of a dropdown menu, a text input field, and a search icon.

- b. **Sales Opportunity Search:** Search opportunity-specific fields such as Opportunity Status or Opportunity Source. Opportunity management is discussed in greater detail later in this guide.

The screenshot shows the 'Sales Opportunity Search' interface. It is divided into two columns of filters. The left column includes: Opportunity Name, Opportunity Type, Status, Win Probability, Opportunity Source, Opportunity Custom Text, Custom 1, Custom 3, Opportunity Custom 5, Opportunity Custom 7, Opportunity Custom 9, Opp Custom Character 11, Opp Custom Character 13, Opp Custom Character 15, Opp Custom Date 1, Opp Custom Date 1 Range, and Opp Custom Date 3. The right column includes: ID, Forecast Date, Forecast Date Range, Close Date, Close Date Range, Sales Stage, Close Reason, Custom 2, Custom 4, Opportunity Custom 6, Opportunity Custom 6 Range, Opportunity Other Record, Opp Custom Character 10, Opp Custom Character 12, Opp Custom Character 14, Opp Custom Character 16, and Opp Custom Date 2. Each filter typically consists of a dropdown menu, a text input field, and a search icon.

Search unnamed campaigns: On occasion, records may be entered into the database with a Campaign Code that does not correspond to an existing Campaign in the database. In these cases, the Campaign Code displays with the prefix "ID=" Users can search on records with nonstandard campaign codes by selecting "Leads with no campaign" in the Campaign field dropdown list on the Search screen and clicking Go.

Search Custom Forms – search by responses to questions or specific fields within a custom form.

The image shows a search interface with two columns of dropdown filters. The left column contains: Title Code, Function, Metro Area, State, and Country. The right column contains: Lead Status, Lead Sales Stage, Campaign, Forecast Date, Initial Lead Grade, and Lead Source. Each dropdown has a magnifying glass icon to its right. Below these filters is a red-bordered box containing a checkbox and the text "Search Custom Forms".

Save Search - To save time running your most common queries, you can save the search and sort parameters so that you can later run the saved search with just one click. Perform a search as usual, entering the desired parameters and sort parameters in the main Search screen and clicking Go.

Search Results

The screenshot shows the Search Results interface. At the top, there are buttons for 'Page Options', 'Record Options', and a search input field containing 'test' with a 'GO' button. To the right, it indicates '23 Records'. Below this is a table with columns: Company, Email, Contact, Phone, Lead Status, Campaign, More Info, Entered, and Last Updated. A dropdown menu is open over the 'Page Options' button, with 'Save This Search' highlighted in red. The table contains several rows of data, including one with 'test' in the Company column and 'Appointment' in the Lead Status column.

Company	Email	Contact	Phone	Lead Status	Campaign	More Info	Entered	Last Updated
test		Joanna Hernandez		Appointment	None		2/27/2020	9/15/2020
Test Company	Test@test.co	Test Test			IMPORT 3081		12/4/2019	5/11/2020
Test Company	Test@test.co	Test Test			Bugs		12/4/2019	5/11/2020
Test Company	Test@test.co	Test Test			Jo		12/4/2019	5/11/2020
Test Company	Test@test.co	Test Test			LeadMaster T		12/4/2019	5/11/2020

On the Search Results screen, click on **Page Options** button then **Save This Search**. Enter the desired name for the search and click on Submit.

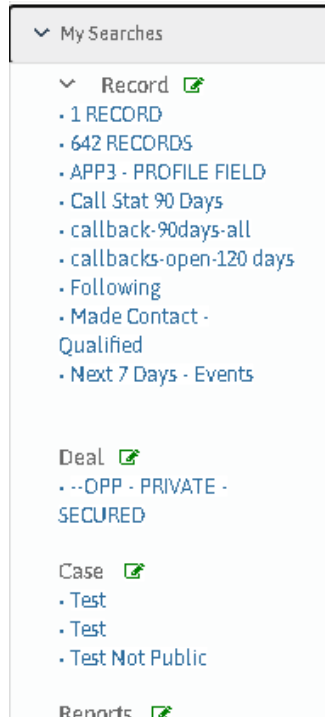
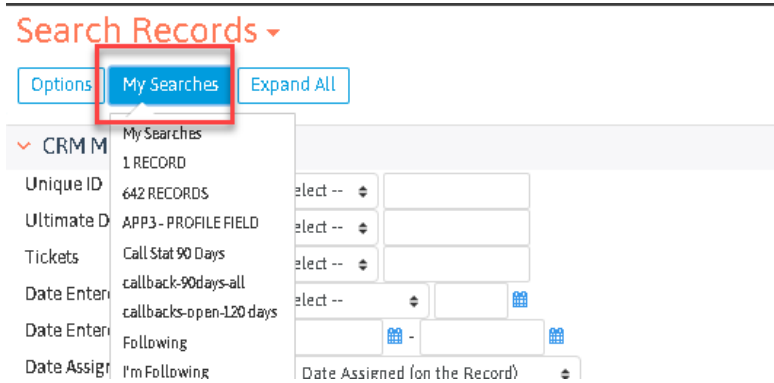
Save Search

The 'Save Search' dialog box contains the following fields and options:

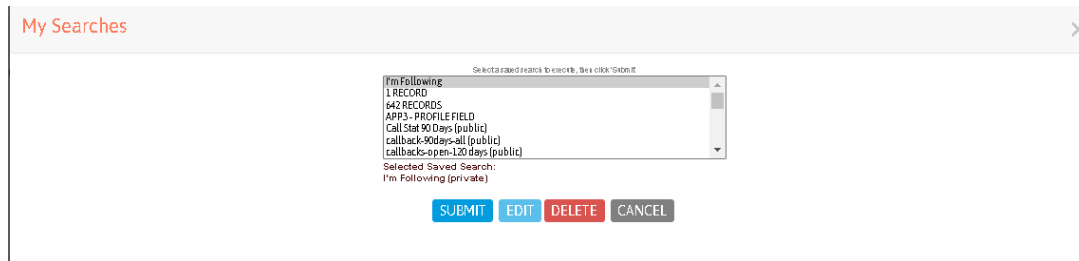
- Search Name:** A text input field.
- Is Public:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Save Search For:** A dropdown menu showing a list of users: Jo Admin 3, Andy B5, chirag darji, Jo Global2, Jo Global H, Jo III Hernandez, and Jo Hernandez2.
- Apply Security For Selected User:** Radio buttons for 'Yes' and 'No', with 'Yes' selected.
- Buttons:** 'SUBMIT' and 'CANCEL' buttons.

Your Search is now saved and can be accessed at any time by clicking the **My Searches shortcut** on the homepage or by clicking the **My Searches button** near the upper left-hand corner of the main Search screen. The pop-up window will display all of the searches you have saved. Select the desired search and click on Submit.

This will run a real-time query on your records and produce Search Results using the search and sort parameters specified when you created this search.



If you wish to delete a saved search, click the edit icon beside your saved search on the homepage shortcut, select the desired search and click delete. A pop-up window will appear asking you to confirm that you wish to delete this saved search.



Search or Browse Accounts – The Accounts button offers users an easy way to quickly review the Companies associated with all records to which they have access and perform simple searches by Company name. To review Accounts, click on Accounts from the top navigation bar on any page. This displays all records to which you have access and can be sorted depending on your preference. To sort the list, click on the column header of the page.

To search for a Company, enter the full or partial name in the Company search box then click "Go."

Search or Browse Contacts – The Contacts button immediately creates a list of all of the primary and additional Contacts for all records to which the user has access. Like the Accounts function, users can perform simple searches by Contact name. To review Contacts, click on Contacts from the top navigation bar on any page. This displays all records to which you have access and can be sorted depending on your preference. To sort the list, click on the column header of the page.

To search for a specific Contact, enter the full or partial last name in the Contact search box then click "Go."

DOWNLOADING RECORDS

Download search results using Mailing List, Basic Fields or an existing Custom Download set-up

On the Search Results screen, select the Download format you wish to use in the Download Search drop-down box in the bottom left corner of the page.

You can choose to use the Mailing List or Basic Fields set-up or a Custom Download that you have previously created (see below for directions on creating a new Custom Download). Selecting the desired download template then click Go to immediately launch the download process using the set-up you have chosen.

If you do not make a selection, Mailing List is used as the default format for the download. The download process opens a new window displaying the search results as a .csv (comma delimited) file. You can work with the data from this page or save it to disk.



Include additional contacts – Additional contacts can be included in your download. When using the download function, the system will prompt you as to whether you wish to include the additional contacts associated with the selected records in the download. Choose Yes to include all additional contacts listed in the records being downloaded. Each contact will appear as a separate record.

Include Additional Contacts

Download only primary contacts that *meet search criteria*
 Include secondary contacts

Download all primary contacts in search results
 Include secondary contacts

Submit Cancel

Create a Custom Download Template - You can customize the fields you wish to be included in a download, including both standard and custom fields by creating a Custom Download Template.

Click on the Templates button to launch the Manage Downloads interface.



1. Click on **Add Download Template** button
2. Enter a name for your custom download template
3. Choose whether to make the template private or public to be accessible by other users
4. Select the fields you wish to be included by clicking in the checkbox for the field name.

REPORTING

"ONE CLICK" REPORTING FUNCTION

For users with access to reporting functions, the Reports button in the navigation bar at the top of every screen provides users with Reporting permissions with a shortcut for running standard reports on all records to which they have access.

- **To access Reports:** Click on Reports from the top navigation bar on any page. Choose the report type, type a name for the report (optional) and indicate sort parameters (optional) and then click "Go." After running the Report, the user has access to the standard Report functions, depending on their security privileges. Options include customize download, download file, download mailing list and print /email.
- **Narrowing results for reporting:** It is important to note that the Reports shortcut button by default runs the selected report for all records to which the user has access. To narrow the results, employ the Report Filter by clicking on the red Search button in the top right corner of any screen. Select the desired parameters to narrow the results, then click "Go." On the Search Results page, the user can access the same reports offered through the Reports shortcut by clicking on the Report Filter tab above the Search Results as explained below.

REPORT FILTER

It is important to note that the Reports shortcut button by default runs the selected report for all records to which you have access.

To narrow the results, instead of using the Reports shortcut at the top of any page, employ the Report Filter by clicking on the large Search button in the top right corner of any screen. Select the desired parameters to generate the record set which you wish to be included in your report, and then click Go. On the Search Results page, click on the Report Filter button. Choose the report you wish to run from the list, type in a name for the report (optional) and indicate the desired sort parameters (optional) and then click Go to generate the selected report. If you do not enter a name for the report, the system will use the generic report name as the title in the black tab at the top of the report. After running the Report, you can Print or Email it as desired.

STANDARD REPORTS

A number of standard predefined sales and marketing reports are available, including:

LEAD HIGHLIGHTS REPORT

Provides an overview of all records, including text information in comments field. If you do not specify sort parameters, by default the system sorts report results by Date Entered, Lead Grade and Company.

LEAD STATUS/ACTIVITY REPORT

Summarizes records by forecast date, lead value and current grade. If you do not specify sort parameters, by default the system sorts report results by Forecast Date, Current Grade and Company.

LEAD SUMMARY REPORT

Provides a bar chart overview of current grade for all records.

FORECAST REPORT

Displays all records with a forecast date entered and probability greater than zero percent. If you do not specify sort parameters, by default the system sorts report results by Forecast Date, Lead Value and Probability. Records with a past due forecast date are highlighted in green. The forecast report includes a lead value subtotal for each page of records displayed as well as a total for the full set of records included in the report.

FORECAST UPDATE REPORT

Facilitates quick updating of records with key sales fields for groups of ten records displayed on a single screen, with records with no forecast date entered appearing first, followed by records with a past due forecast date, as indicated by green highlighting. If you do not specify sort parameters, by default the system sorts report results by Forecast Date and Lead Value. The forecast update report includes a lead value subtotal for each page of records displayed as well as a total for the full set of records included in the report.

Key fields in the Forecast Update Report are editable. Simply enter changes by making the desired selections from the various drop-down boxes and press Submit. Remember to submit the changes for the current page before moving to another page.

LEAD AGING REPORT

Reports on the days out or number of days since a record was assigned but not updated. A record must be updated from the Sales Update screen to halt the Record Countdown. If you do not specify sort parameters, by default the system sorts report results by Date Assigned so that the records with the most days since updating appear first.

CALL BACK REPORT

Displays all records with a call back date scheduled, including key contact information. If you do not specify sort parameters, by default the system sorts report results by Call Back Date and Company.

INDUSTRY ANALYSIS REPORT

Summarizes records by industry type in bar chart format.

SALES COMMENTS REPORT

Displays sales comments entered for all records in the report. If you do not specify sort parameters, by default the system sorts report results by Date Entered, Lead Grade and Company.

SORT REPORT

Using filters, you can sort the records included in your report by the values in three fields. To set the primary sort parameter, select the appropriate field in the drop-down box. When you select a field, the system sets the default sort order to Ascending, which sorts results from A to Z or 0 to 9. To reverse the sort order, highlight Descending. To set second and third levels for sorting, simply repeat the steps outlined above. When you are finished, press Go to run the report.

CUSTOM REPORT

Custom reports tailored to your company's needs can also be created and added as an option on the Reports screen. If you are an Administrator and wish to discuss options for creating a custom report, please contact your Account Manager.

PRINT REPORT

Run the desired report and click on the Print Report button in the menu bar above the report. A new window will open containing only the report. Click the Print button at the top of the pop-up window to launch the printer interface on your computer. The printed report will contain the title you specified when you generated the report or if one was not entered, the name of the report type will be used as the report title. The report also contains the current date in the report header area.

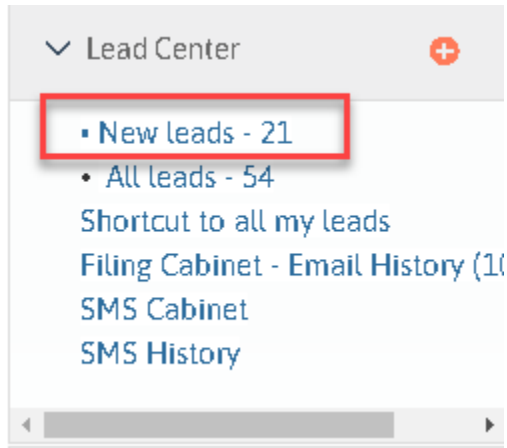
EMAIL REPORT

Run the desired report and click on the Email Report button in the menu bar above the report. A new window will open containing only the report. Click the Email button at the top of the pop-up window to launch the email interface. Enter the recipient(s) valid email address(es) (required) as well as the plain text message you wish to accompany the email (optional). If you are sending the report to more than one individual, separate the multiple email addresses with commas. Click Send to email the Report to the specified recipient(s). The recipients will be emailed immediately; the report will be included in the message as an HTML file attachment, which can be viewed in a web browser and/or saved. The emailed report will contain the title you specified when you generated the report, or if one was not entered, the name of the report type will be used as the report title. The report also contains the current date in the report header area.

ASSIGNING RECORDS

NEW LEADS

In the Lead Center (accessible by clicking Home in the top navigation from any page) click New Leads to view a listing of the newly reassigned leads.



USE SEARCH

To view all of the leads in your account (including new leads and leads which were previously updated) go to Search and click on Go without specifying any criteria. The Search results will show all the leads in your account.

WAYS TO REASSIGN RECORDS

The screenshot shows a pop-up window titled "Assign Record" with a close button (X) in the top right corner. The window contains the following fields and options:

- Group - Support**: A dropdown menu.
- Partner - Partner Rep**: A dropdown menu.
- Flag Assigned Records As New**: A checkbox.
- RECORD SELECTION**:
 - Assign selected records in the search results
To reassign records, click the checkbox to the left of the records in the search results on the records list page.
 - Assign all records in the search results
- EMAIL NOTIFICATION**:
 - Support Request Update
 - Partner Rep Request Update
- Comment (optional)**: A text input field.
- SUBMIT** and **CANCEL** buttons at the bottom.

ASSIGN ONE OR MORE RECORDS AT A TIME FROM THE ACCOUNTS, CONTACTS AND SEARCH RESULTS PAGE

On the Accounts, Contacts and Search Results Page, select the records you want to reassign to one person (either by clicking individual boxes or using the select page function). Click the Record Options button and select Assign. A pop-up window will open showing the Assignment page. Select the Account Manager and/or Partner you wish to assign the Records to, choose an option under Record Selection and Email Notification, add any comments you would like to log to all of the records and click Submit.

ASSIGN THE RECORD FROM THE RECORD PAGE – SALES UPDATE, EDIT PROFILE, VIEW PROFILE
On the Record Page, click Actions button at the top and select Assign.

ADDING NEW RECORDS

Note: Only users with security permission to add new records to the database have access to the Add Record menu.

1. **Click on Add New Records** – in the main navigation menu. Select Add New Record or Lead. Enter all available lead data. Some fields may be required.

Add New Record
✕

Clear Form
Check For Match

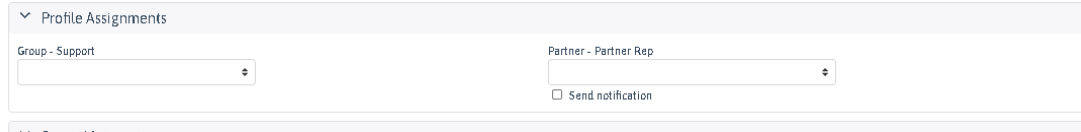
> Options

▼ Primary Contact Information

A * indicates a required field. Highlighting denotes fields that are used to check for matches.

Parent Company	City	Company Revenue
Company	State	Employee Size
Prefix	Zip	Unique ID
First Name	Web Address	Ultimate Duns
Last Name	Phone	Tickets
Title	Alternate Phone	Country
Title Code	Cell/Mobile	
Function	Fax	
Address 1	Email	
Address 2	Contact Method	
Address 3		

2. **Assign the Record** - In the Profile Assignments area, select an Account Manager and, if appropriate, a Partner.



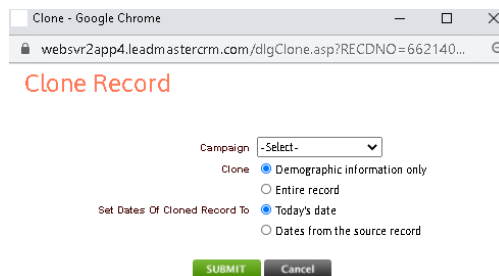
The screenshot shows a form titled "Profile Assignments". It contains two dropdown menus: "Group - Support" and "Partner - Partner Rep". Below the "Partner - Partner Rep" dropdown is a checkbox labeled "Send notification".

3. **Choose the Campaign** –from the campaign drop-down list.
4. Click Submit
5. **Complete Custom Forms** – If the new record you entered belongs to a Campaign which has one or more custom form associated with it, the system will prompt you to fill out each relevant form. Some questions or fields may be required. Enter the necessary information as prompted by the system and submit the results in order to complete the addition of this new record to the database.

CLONE

Another way to create a new record in the database is through cloning. To create a duplicate record, access the Record you want to copy and click on the Clone option under the Actions menu.

In the pop-up window, select a Campaign, select the appropriate option for either cloning only the basic information (contact data and assignment) or the entire record (including special interest fields, comments, file attachments and custom forms associated with the record). Select the Entered Date option for the cloned record and click Submit.



Clone - Google Chrome
websvr2app4.leadmastercrm.com/dlgClone.asp?RECDNO=662140...

Clone Record

Campaign: -Select-

Clone: Demographic information only
 Entire record

Set Dates Of Cloned Record To: Today's date
 Dates from the source record

SUBMIT Cancel

All cloned records contain a note that it is a cloned record, along with the date and user name of the user who performed the cloning.

ADDITIONAL DATA IN RECORDS

ADDING AND EDITING CONTACTS

The Profile, Edit Profile and Sales Update screens all display key details on additional contacts for a record. This information appears in the section immediately below the main demographic and company information. In the Contacts section, the primary contact is listed first (by a yellow key icon), followed by all additional contacts associated with the record listed in alphabetical order. This section displays denoted only the title, phone and email for each contact.

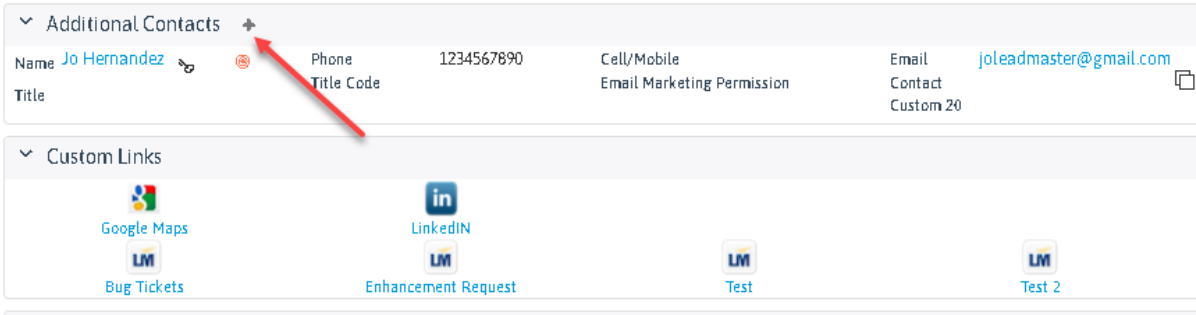
Note: Only users with Full Edit or Edit Contacts privileges have access to functions related to the editing of contacts. Users without these permissions will not see the buttons described below (such as the Submit, Update, Delete or Change to Primary) or the Add Contact option displayed on their screen.

TO ADD A CONTACT TO A RECORD

On the left panel > Click the + on the Contacts section. In the pop-up window, enter the appropriate information for the new contact (first and last name are required) and press Submit.

The screenshot shows the CRM interface with the 'Sales Update' screen. The left panel has a navigation menu with 'Home', 'Accounts', 'Contacts', 'Deals', 'Reports', 'Library', and 'Add Records &'. Below the menu, there are sections for 'Quick Search', 'Find Match', 'Email History', 'Contacts (1)', and 'Contact History'. A red arrow points to a plus sign (+) next to the 'Contacts (1)' section. The right panel shows the 'Sales Update' form with an 'Actions' button. The form includes a 'Company' field with 'swf', a 'Contact' field with 'Jo Hernand', and a 'Record - Checkbox' section with 'Value 1' and 'Value 3'. Below that is the 'Primary Contact Information' section with 'Name: Jo Hernandez', 'Title: egt', and 'Address 1' and 'Address 2' fields.

Alternately, you can add a contact by clicking on the Add Contact button in the gray menu bar near the top of the page. Once submitted, the new contact will appear in the Contacts area.



AUTO-FILL CONTACT INFORMATION

When adding an additional contact to an existing record, you can auto-fill the address information with the address listed for the primary contact to reduce data entry time. To do so, in the Add New Contact pop-up window, click on the "Use primary contact address" checkbox to auto-fill the address fields.

To clear all of the address fields click on the checkbox again to remove the checkmark. Make any necessary changes and additions to the screen and then click Submit to save the new contact record. To close the window without saving the new contact record, click Cancel.

Use primary contact address
 Use primary contact phone

DESIGNATING A CONTACT AS PRIMARY

When adding a new contact, you may also choose to designate the individual whom you are adding as the Primary Contact for the record. The Primary Contact name and contact information is listed in the upper section of the record profile as well as being included in the Contacts area. Doing so will move the existing primary contact down to the additional contacts area, but all information for that contact will be maintained.

To designate a new Contact as Primary: In the Add New Contact pop-up window, enter all details for the new contact, click Actions menu and select Change to Primary Contact.

You can also move an existing additional contact listed for a record to the Primary position by using the same Change to Primary Contact option described above from the Edit Contact pop-up screen.

TO VIEW OR UPDATE THE FULL DETAILS FOR A CONTACT

Click on the hyperlink for their name. In the pop-up window, enter any addition or changes and press Submit. To return to the main record without making any changes, press the Cancel button.

CONTACTS NOTES FIELD

Each contact has a Notes field that appears in the detailed contact area for the individual and may be useful for storing information specific to that person. This free text field supplements the existing Sales Comments/Notes text field, which may be appropriate for tracking information of a more general nature that relates to the record as a whole.

For advanced users, the new Notes field is included when cloning a record and is also available for download and import.

To add or edit Notes for a Contact, in the Contacts section of the Profile, Edit Profile or Sales Update screen, click on the name of the person for whom you wish to add or edit the contact Notes. In the detailed contact window, enter or edit the comments in the Notes field at the bottom of the pop-up window. Click Submit to save these changes to the contact. To close the window without making any changes, click Cancel.

ATTACHING CUSTOM FORMS

Supplemental, web and smart custom forms can be attached to a record when it is first added to the database or can be appended at any time after the record is created.

Sales and feedback forms are attached at the campaign level rather than at the individual record level.

Note: All users can see custom forms attached to a record but only users with appropriate security access can edit data collected in the custom form or edit the form description field.

TO ATTACH A CUSTOM FORM WHEN MANUALLY ADDING A NEW RECORD

To attach a supplemental, web or smart form to a new record added manually into the system - on the Add New Record screen select the desired custom form from the Custom Form selection box at the top of the window. Enter all other information for this new record and then click Submit. In the next step, the system will prompt you to enter the custom data.

TO ATTACH A CUSTOM FORM TO AN EXISTING RECORD

Supplemental, web and smart forms can be attached to an existing record from the Profile, Edit Profile and Sales Update screens. On any of these screens, you can add a form by clicking on the Attach Form button in the gray menu area near the top of the screen. In the pop-up window, select the desired form from the list and click on Submit. Alternately, you can launch this interface by clicking on the orange Add button located in the top right corner of the Attached Forms section.

ACCESSING CUSTOM FORMS

Each entry in the Attached Forms lists the date and time that the form was added to the record or last modified as well as the form name, description, form type and form status. A newly attached form has a status of "New" while a form that has been modified has a status of "Modified."

To access and edit a custom form attached to a record, on the Profile, Edit Profile and Sales Update screens for the record, all custom forms currently attached to the record are displayed in the Attached Forms section below the Profile Summary. To open a specific form, click on the appropriate Form Name in the list. The completed form will launch in a pop-up window. If the form is set up to allow editing, you can update the information by entering the desired changes and clicking the Update button at the bottom of the form. To close the window without making any changes, simply click the Close button.

If editing is not permitted, the Update button will not be displayed.

FILE ATTACHMENTS

Files can be uploaded to a record, viewed and deleted from the File Attachment area located in the “Attached Files” section of the record’s profile.

- **To view an attached document**, simply go to this area and click on the filename in the gray box to launch the desired document.
- **To upload an attachment**, click on the [Add/Edit Attachments](#) hyperlink to the right. A window will open displaying all attached documents and providing browse/upload buttons. To upload a document, browse for the desired file on your computer or network and once the filename appears in the text box, click on [Upload](#). Once the file is successfully attached to the record, the file name will appear in the file list, along with the file size and date uploaded. File types authorized for upload are set by your Administrator. There is a 3 MB file size limit per attached document.
- **To delete an attached file**, simply click on the [delete](#) hyperlink to the left of the file you wish to delete in the Add/Edit Attachments pop-up window.

MANAGING OPPORTUNITIES

Some company databases have advanced functionality for tracking individual sales opportunities associated with records in the database. If this function is available, advanced users can be given access to the opportunity functions, including searching, adding, editing and reporting on opportunities.

ENTERING A NEW OPPORTUNITY

To enter a new opportunity or edit an existing opportunity, go to the Sales Update screen for the record. In [the Sales Opportunity section](#), click on the [Add](#) button. In the Opportunity Detail pop-up, enter the details for the opportunity and press [Submit](#).

EDITING OR DELETING AN OPPORTUNITY

To edit or delete an existing opportunity, go to the [Sales Update screen](#) for the record. If one or more opportunities have been entered, the opportunity name(s) and a brief summary will appear in the Sales Opportunity section. To edit or delete an existing opportunity, click on the [Opportunity Name](#) Hyperlink. In the Opportunity Detail pop-up, enter the necessary changes or additions and press Submit. To delete the opportunity, press [delete](#).

SEARCHING OPPORTUNITIES

Users with the necessary access privileges can search on opportunity-related values from the main search screen. Keep in mind that the Search Results screen will display all records with one or more opportunities that meet the criteria you specified.

REPORTING ON OPPORTUNITIES

To access opportunity-specific reports, follow the same instructions as for standard reports and choose the desired report from the [Opportunity Reports section](#) of the report type selection list. Note that many of the Opportunity Reports have default sort parameters pre-selected.

From the Report display page, you may choose to Download, Print or Email the report.

OPPORTUNITY REPORT TYPES

Opportunity Forecast: Provides an overview of all forecasted opportunities to which you have access. Displays only opportunities with an opportunity forecast date entered; Default sort by: Opportunity Forecast Date (ascending), Total Opportunity Value (descending), Win Probability (descending). Opportunities with a past forecast date (i.e. before the current month) are highlighted.

Opportunity Forecast Update: Displays all opportunities, including those without an opportunity forecast date entered with multiple entries shown on a single screen for easy updating. Default sort by: Opportunity Forecast Date (ascending), Total Opportunity Value (descending). Opportunities with no forecast date entered are displayed first and opportunities with a past forecast date (i.e. before the current month) are highlighted.

Opportunity Highlights: Default sort by: Opportunity Last Updated Date (descending), Total Opportunity Value (descending). Opportunity Description and Opportunity Notes are displayed if they have been entered, including the date stamp and username.

Closed Opportunity List: Provides a summary of all opportunities to which you have access where the Sales Stage that is equal to "Closed" and includes a total value. Default sort by: Opportunity Close Date (descending), Total Opportunity Value (descending).

Sales Stage Summary (Chart): Provides a graphical representation of the sales stage of all opportunities.

Opportunity Status Summary (Chart): Provides a graphical representation of the opportunity status of all opportunities.

Opportunity Detail: Offers users a tool for reviewing key information on opportunities for better tracking of progress. Includes basic contact details such as name and phone number for the primary contact. Default sort by: Opportunity Last Updated Date (descending), Total Opportunity Value (descending).

Opportunity Overview Report: A basic list of opportunities for a quick management review. Default sort by: Company Name (alphabetical), Opportunity Name (alphabetical), Total Opportunity Value (descending).

Opportunity Pipeline: Reports on all open opportunities organized by sales stage to help determine which opportunities are at which stage in the pipeline. Default sort by: Sales Stage, Opportunity Forecast Date (ascending), Win Probability (descending), Total Opportunity Value (descending).

Product/Services Forecast: Presents opportunities organized by product/service. Default sort by: Product/Service (alphabetical), Opportunity Forecast Date (ascending), Total Product Value (descending), Win Probability (descending). Opportunities with a past forecast date (i.e. before the current month) are highlighted.

Sales Team Summary: Provides a team-oriented progress report, with a summary of all opportunities organized by Group and Account Manager. Default sort by: Group/Org (alphabetical), Sales Rep (alphabetical), Win Probability (descending), Total Opportunity Value (descending). Opportunities with a past forecast date (i.e. before the current month) are highlighted.

USER SETTINGS

CHANGE PASSWORD

To change the password, click on [My Account](#) at the top right part of any page and click on [Change Password](#) to open the change password window. Fill out the necessary fields and click [Update](#). The New Password will now get updated and will be used the next time you log into the CRM.

Change Password

Current Password:

New Password:

Verify Password:

CHANGE TIME ZONE

To ensure that your call back appointments are entered into your personal scheduling software correctly when using the save call back feature, you will need to set your time zone in the online database. If you need to change your time zone setting, simply click on [My Account](#) at the top right part of any page in the online application. Go to [Time and Date](#) tab, select the proper time zone parameters and click [Submit](#).

If your area observes Daylight Savings Time, make sure this box is checked.