CRM-Xpress

User Guide

CRM-Xpress

CRM-Xpress Access

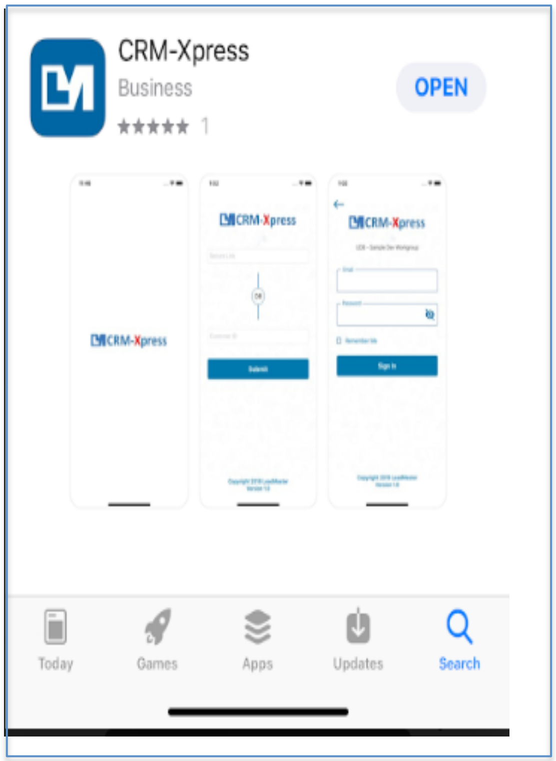
Access Options

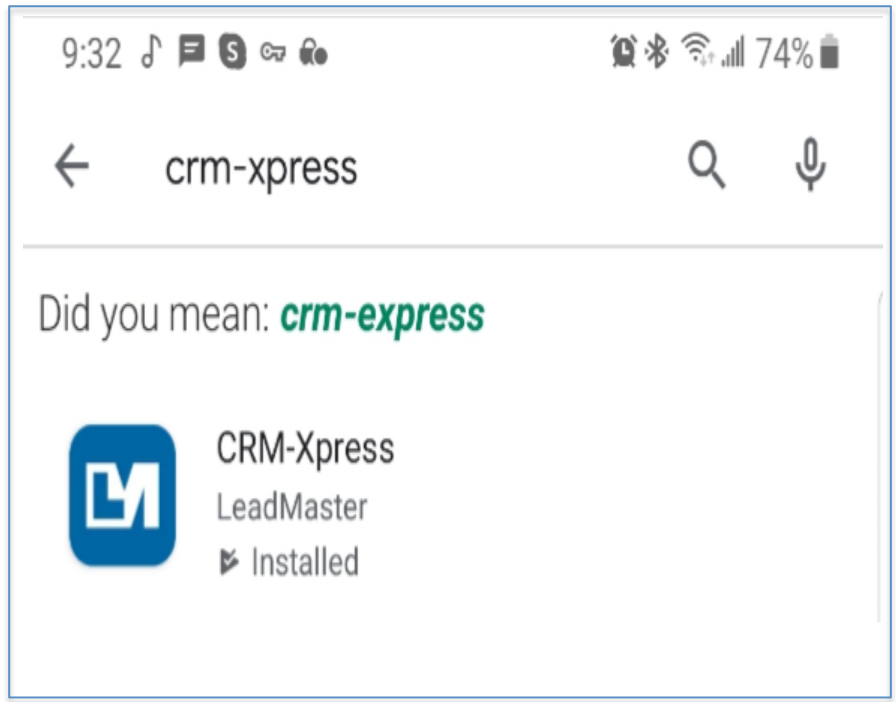
- <u>CRM–Xpress</u> can be used in a browser or with a Mobile APP

- You are provided a login and password to access CRM-Xpress

FREE APP is available in the store

Mobile APP - Available in both iOS and Android – **search on <u>CRM-Xpress</u> in the store**





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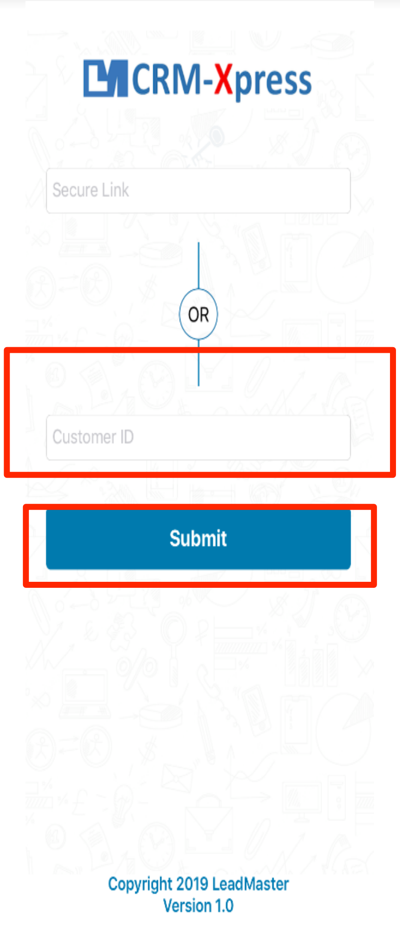
APP Login



Signing into the Mobile APP

Enter Customer ID # 29500

Click Submit

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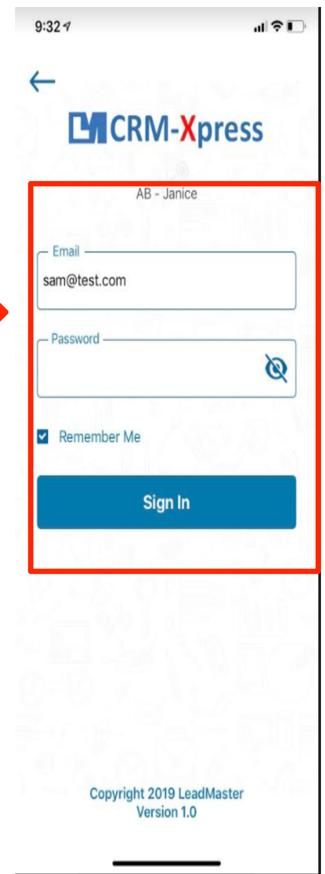
APP Login – 2 Steps

Enter the Customer ID

Enter User ID
& Password
Click Submit



This will take you to the home page -your list of accounts.

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Signing in with a Browser

- You are provided a link to use in a browser
- The link will look similar to this: https://lx.leadmastercrm.com/account_list_lxp.asp?XXXXXXXXXX
- Just like the mobile APP you can access CRM-Xpress with the User ID & Password provided

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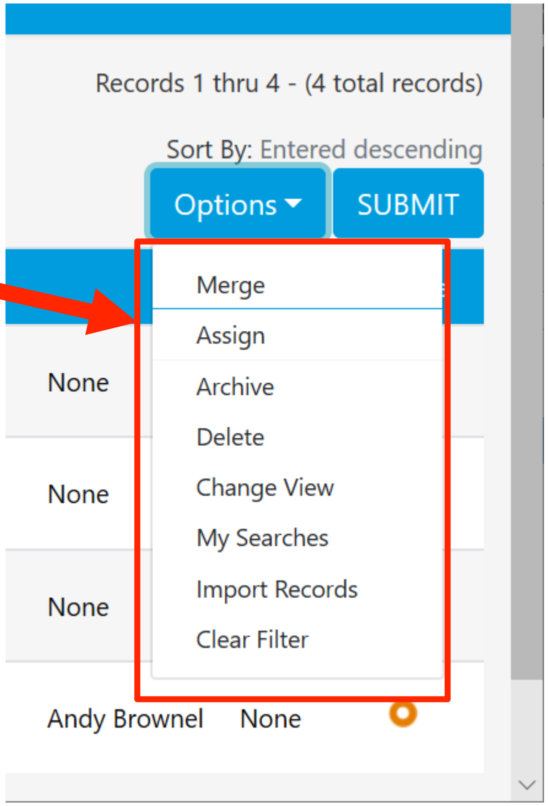
Options

Options for the free version are:

- Merge – combining 2 or more records
- Assign
- Archive
- Delete
- Change View
- My Searches
- Import Records
- Clear Filter



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Options

- Merge – combining 2 or more records
- Assign – Assigning to a rep (N/A)
- Archive – removes from the general view
- Delete – permanently deletes
- Change View – provides different account view
- My Searches – pre-configured filters for easy access
- Import Records – get data into they system in bulk
- Clear Filter – removes / resets the search filter

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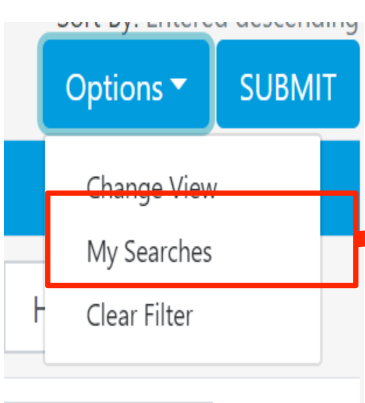
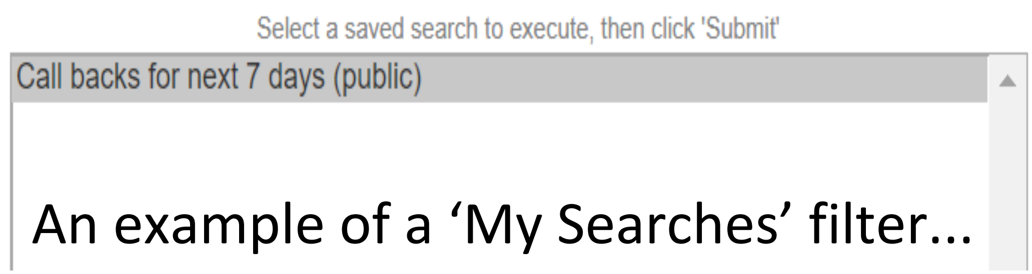
Changing the Header / Selecting Filters

- Change View – changes the header, applying a different view to the accounts list
- My Searches – saved searches created for a subset of records defined by a filter





An example of a ‘My Searches’ filter…

Call backs for the next 7 days

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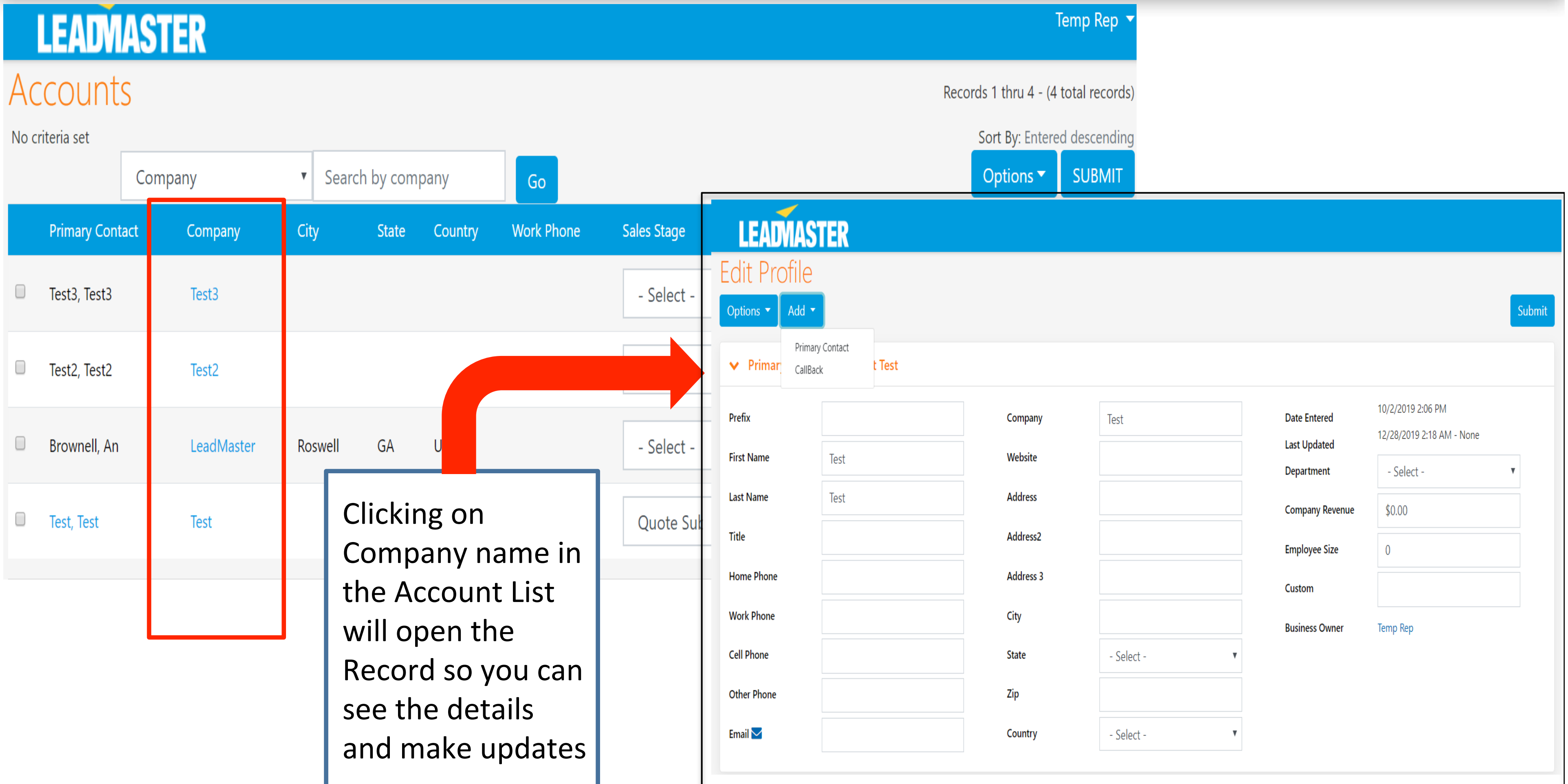
Drilling down to company data



Clicking on Company name in the Account List will open the Record so you can see the details and make updates

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The Record / Edit Account Page

- **These are the available sections on the Record / Edit Account Page**– In the Pro version these sections can be placed in any order, additional sections are available – quotes, opportunities, attached files etc. Sections that aren't used are turned off to simplify the user experience. In the free version customization is not available.

1. Account Info – name, address, phone, email etc.
2. Notes – notes are time stamped for every entry
3. Quick Actions – checkboxes to document your activity
4. CallBack – events, reminders and appointments
5. Closed Call Backs/Events– historical data for events
6. Contacts – the people at the record
7. Pipeline – Sales stage, Lead Grade, Lead Value
8. Custom Info – Text fields

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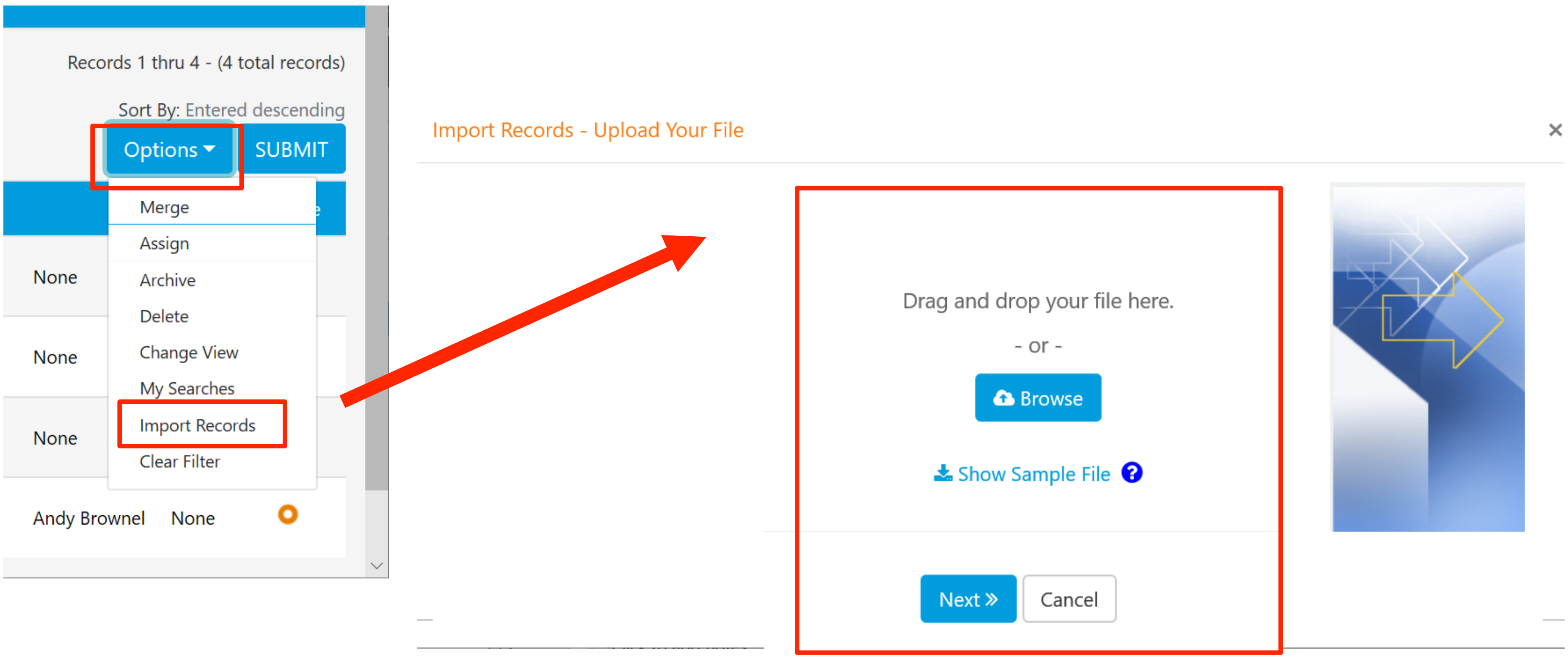
Import Records



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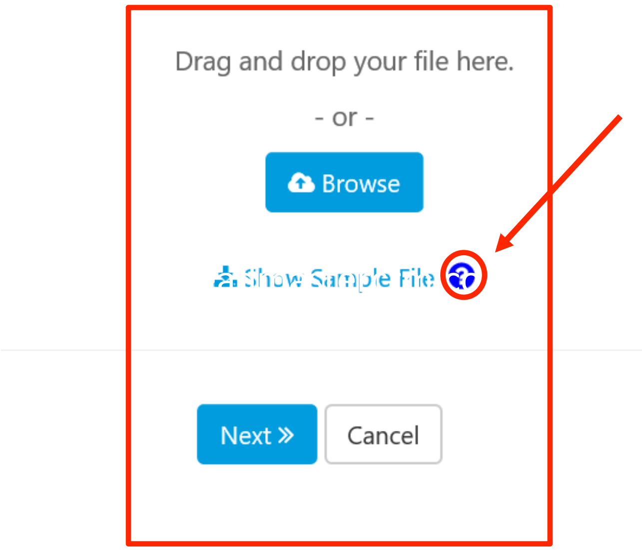
Import Records



The import file must contain the exact same number of columns in the exact same order as the Sample Download File.

Your import file should have the exact same header file as found in the Sample Download file.

Adjust your import file to match the sample Download File.
If you don't have data for a particular columns then add the appropriate column header and leave the rest of the column blank.

Link to Sample File

https://lx.leadmastercrm.com/sample.csv

File must be in .csv

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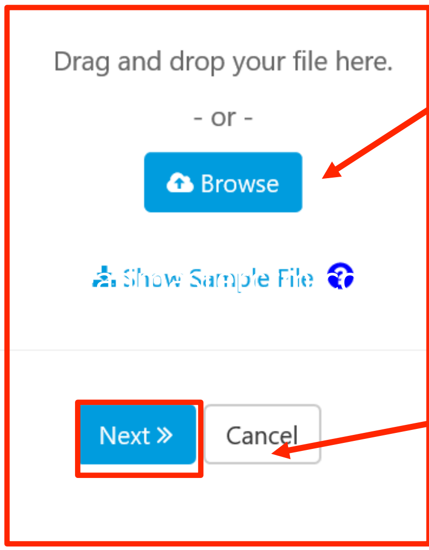
Import Records



To Import Records:
After your file is prepared Drag file to start import OR click Browse to add manually

Note:
File must be in .csv and header must exactly match the example.

Click Next

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Import Records

The import file must contain the exact same number of columns in the exact same order as the Sample Download File. Your import file should have the exact same header file as found in the Sample Download file.

Adjust your import file to match the sample Download File. If you don't have data for a particular columns then add the appropriate column header and leave the rest of the column blank.

Click [Import] to begin the import process. Click [Cancel] to cancel the import.

Number of Records: 1

The free version is limited to 1000 Records.

Import Cancel

You will receive a confirmation message that the import is complete

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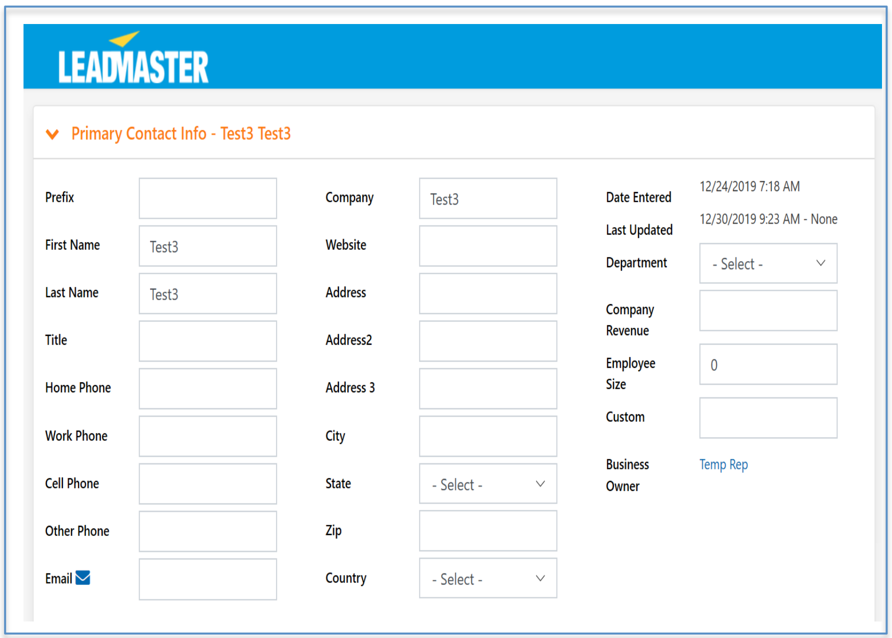
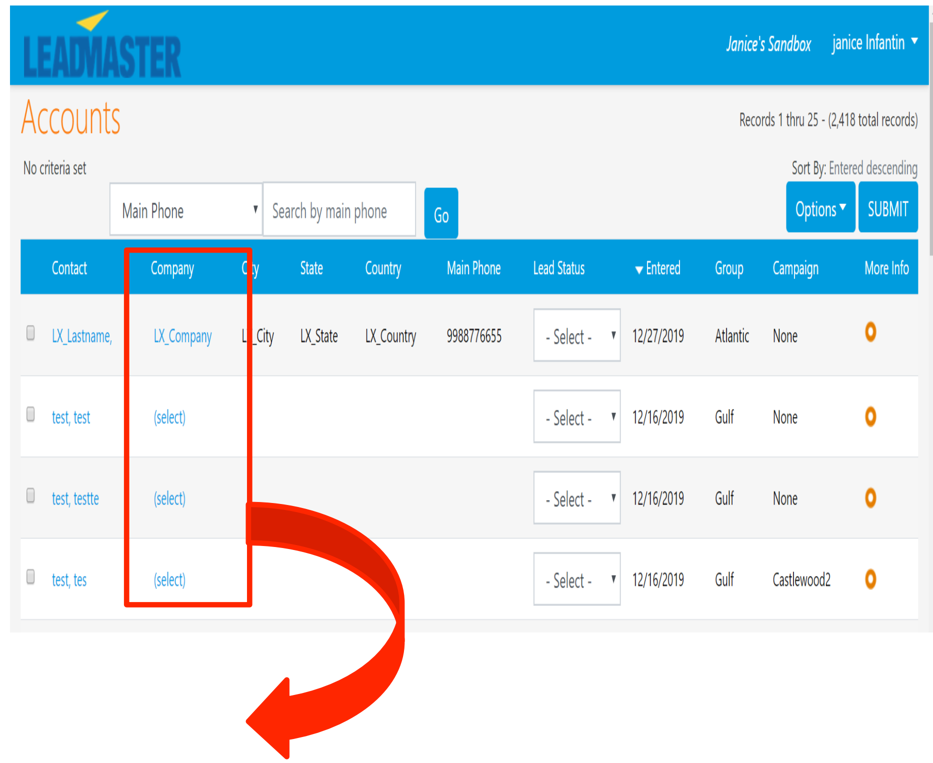
Contact details

Clicking on Contact Name will open the contact details to make changes.





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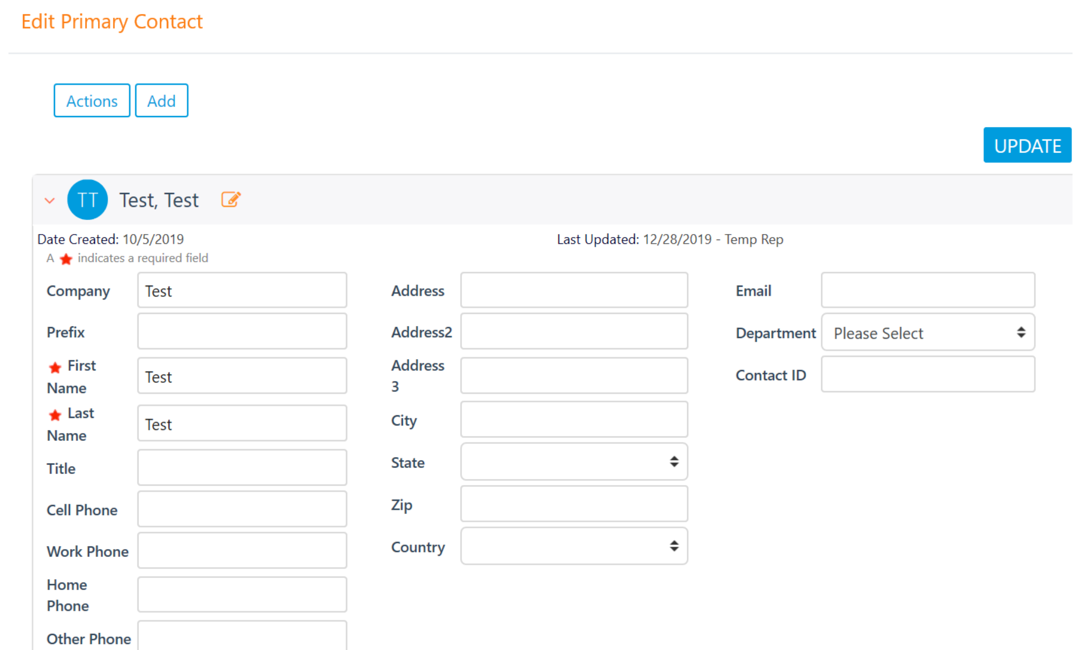
The Edit Contact Page

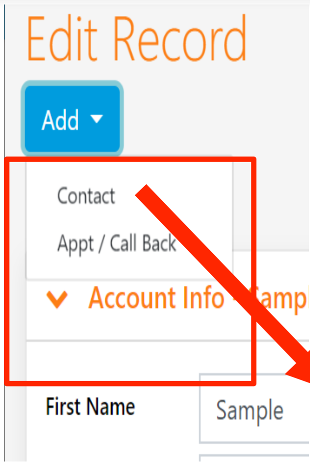
- **These are the available sections on the Edit Contact Page Free Version**

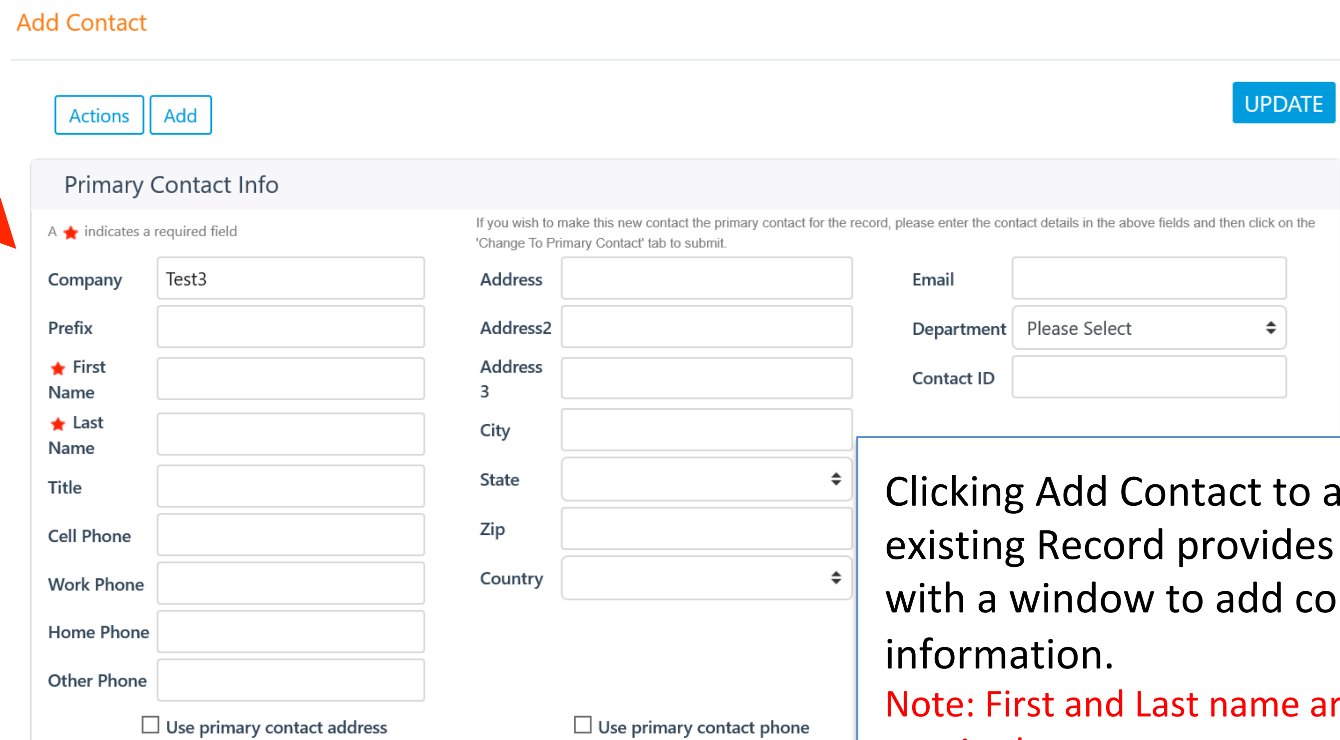
1. Contact Info – demographic fields, name, address, email
2. Contact Notes – these notes are time stamped for every entry and CAN NOT be edited
3. Email History
4. Call Backs/Open Events
5. Attached Files



Contact Options – Add a Contact

Adding contact(s) to an existing company

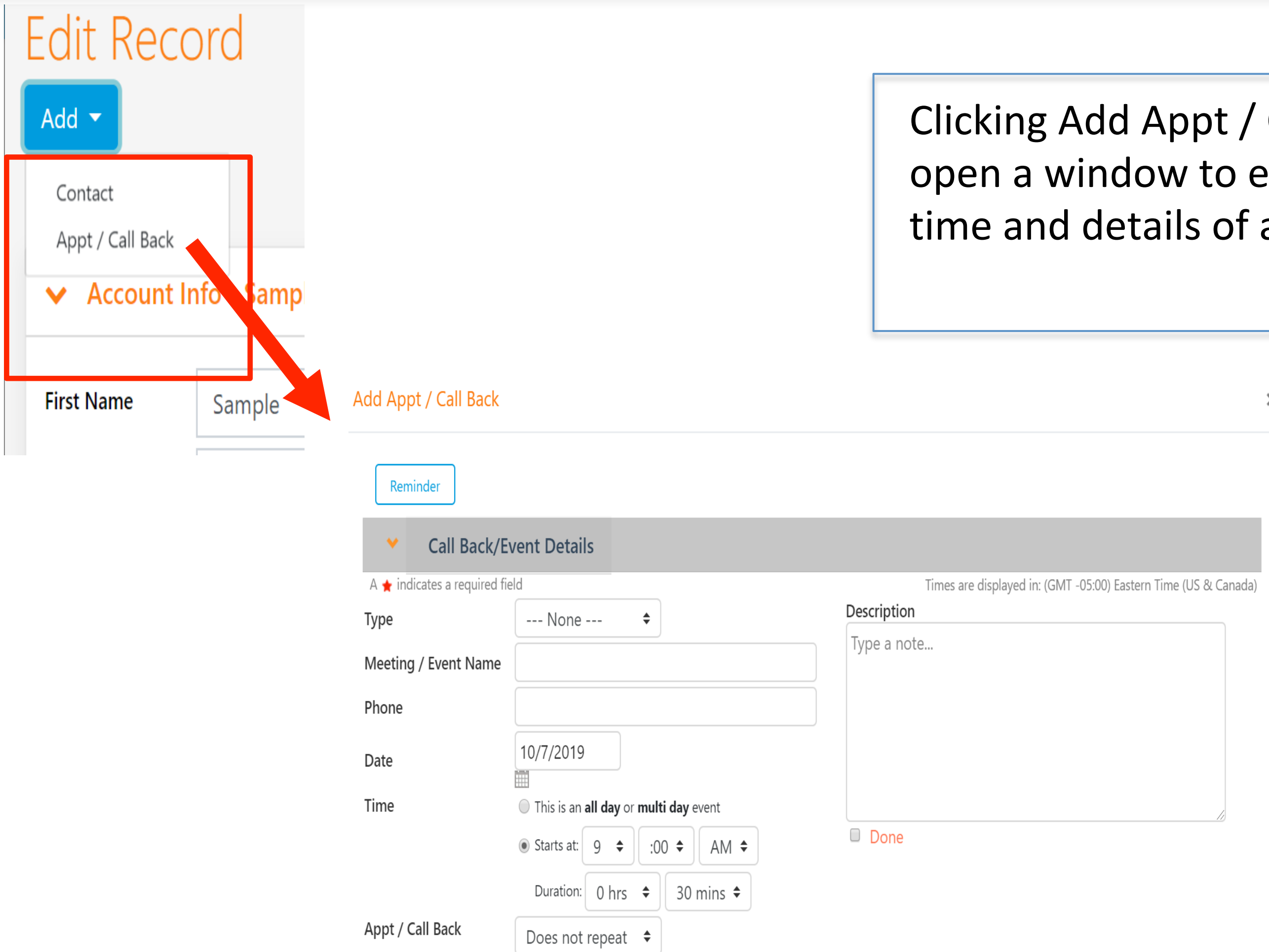




Clicking Add Contact to an existing Record provides you with a window to add contact information.

Note: First and Last name are required

Contact Options – Add an Event



Clicking Add Appt / Call Back will open a window to enter in date, time and details of an event.

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Want to upgrade to a full version?

If you are interested in upgrading to a Professional License email us at: Support@LeadMaster.com or via chat on the LeadMaster website.

Thank you,

The LeadMaster Team

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