



# CRM-Xpress User Guide

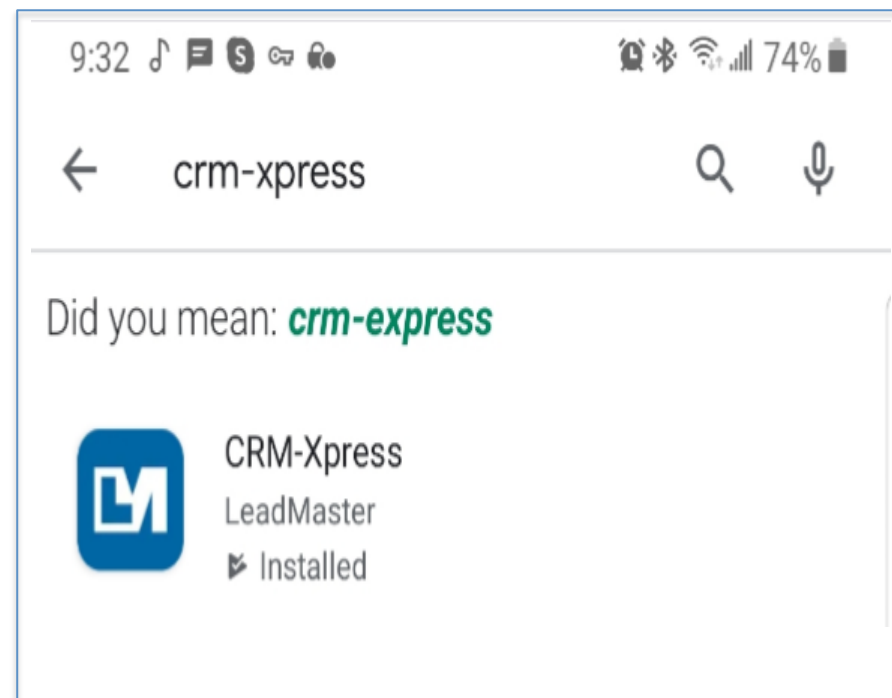
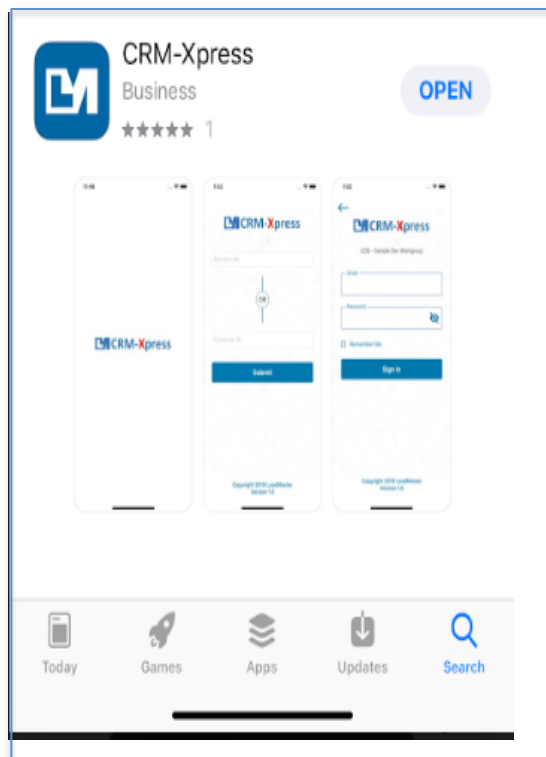
# CRM-Xpress Access

## Access Options

- CRM-Xpress 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 CRM-Xpress in the store**



# APP Login

CRM-Xpress

Secure Link

OR

Customer ID

Submit

Copyright 2019 LeadMaster  
Version 1.0

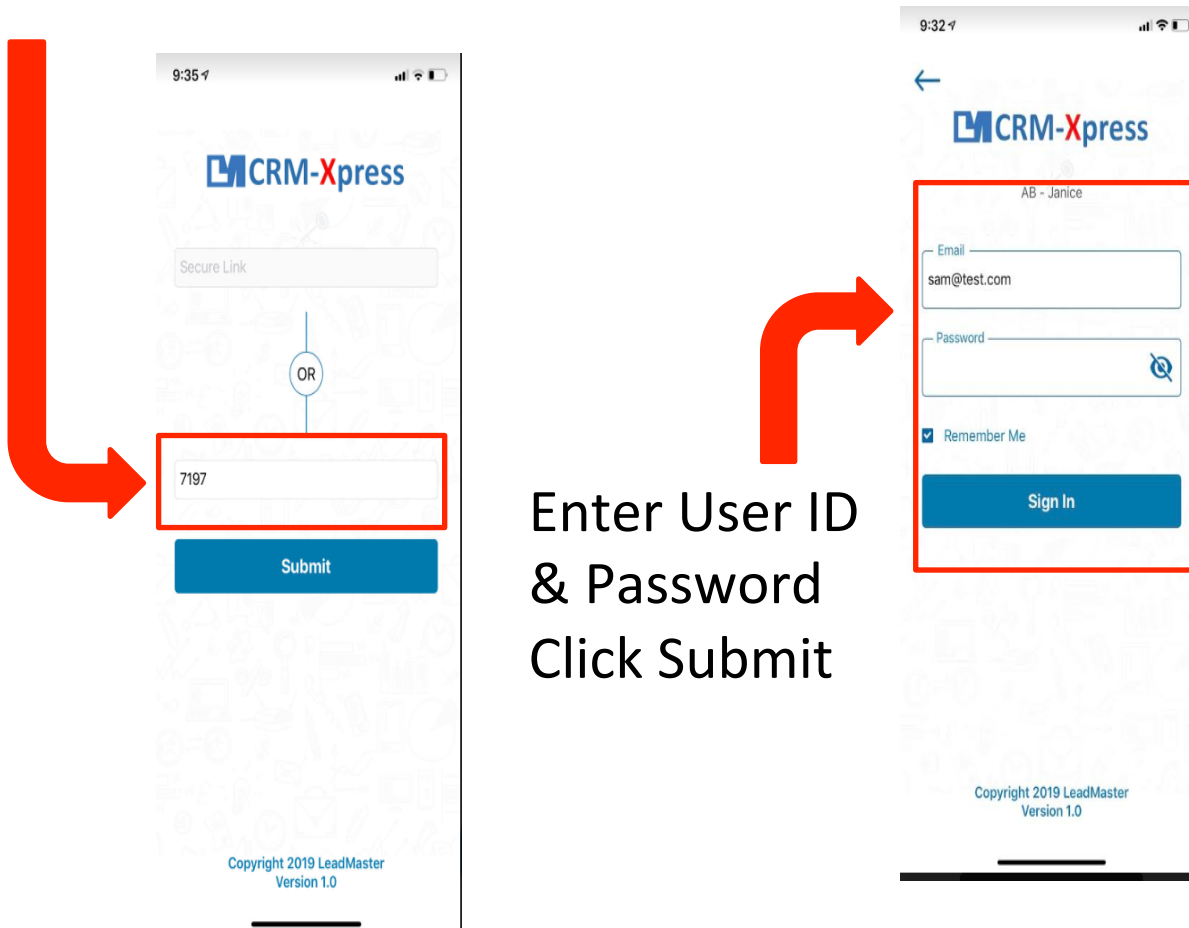
Signing into the Mobile APP

Enter Customer ID # 29500

Click Submit

# APP Login – 2 Steps

Enter the Customer ID



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

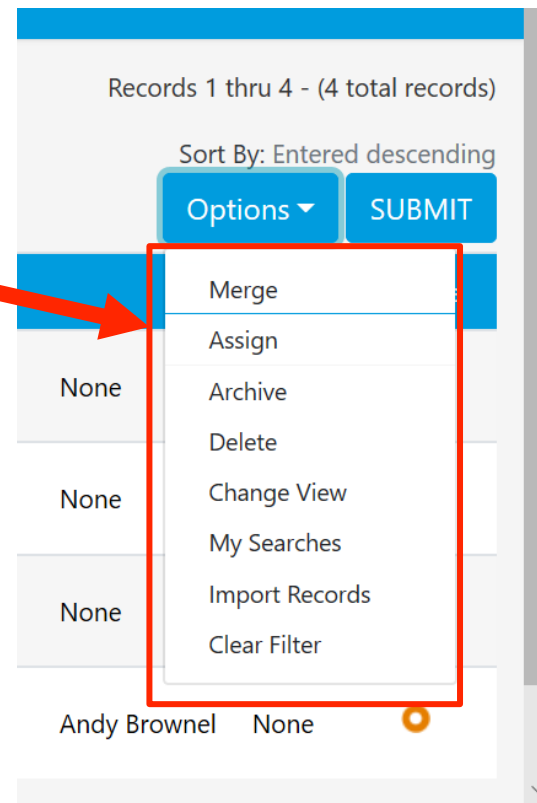
# Signing in with a Browser

- 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](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

# Options

Options for the free version are:

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



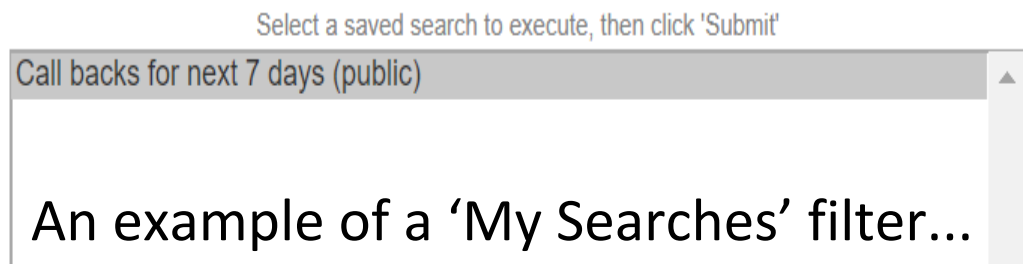
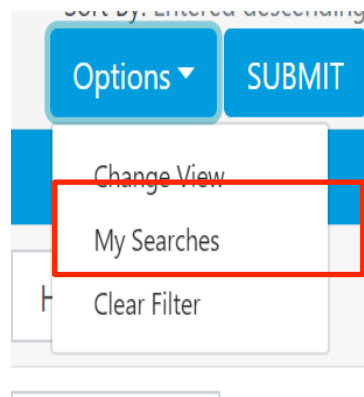
# Options

- 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



# 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



*Call backs for the next 7 days*

# Drilling down to company data

**LEADMASTER** Temp Rep ▾

Accounts Records 1 thru 4 - (4 total records)

No criteria set Sort By: Entered descending

Company ▾ Search by company Go Options ▾ SUBMIT

Primary Contact	Company	City	State	Country	Work Phone	Sales Stage
<input type="checkbox"/> Test3, Test3	Test3					- Select -
<input type="checkbox"/> Test2, Test2	Test2					- Select -
<input type="checkbox"/> Brownell, An	LeadMaster	Roswell	GA	U		- Select -
<input type="checkbox"/> Test, Test	Test					Quote Sub

**LEADMASTER** Edit Profile

Options ▾ Add ▾ Submit

Primary Contact  
CallBack  
t Test

Prefix	<input type="text"/>	Company	Test	Date Entered	10/2/2019 2:06 PM
First Name	Test	Website	<input type="text"/>	Last Updated	12/28/2019 2:18 AM - None
Last Name	Test	Address	<input type="text"/>	Department	- Select - ▾
Title	<input type="text"/>	Address2	<input type="text"/>	Company Revenue	\$0.00
Home Phone	<input type="text"/>	Address 3	<input type="text"/>	Employee Size	0
Work Phone	<input type="text"/>	City	<input type="text"/>	Custom	<input type="text"/>
Cell Phone	<input type="text"/>	State	- Select - ▾	Business Owner	Temp Rep
Other Phone	<input type="text"/>	Zip	<input type="text"/>		
Email <input checked="" type="checkbox"/>	<input type="text"/>	Country	- Select - ▾		

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

# 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

# Import Records

Records 1 thru 4 - (4 total records)

Sort By: Entered descending

Options ▾ SUBMIT


- Merge
- Assign
- None Archive
- None Delete
- None Change View
- None My Searches
- None **Import Records**
- None Clear Filter


Andy Brownel None

Import Records - Upload Your File

Drag and drop your file here.

- or -

 Browse


 Show Sample File ?



Next >> Cancel



# Import Records

Drag and drop your file here.

- or -

 Browse

 Show Sample File 

 Next »  Cancel

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.

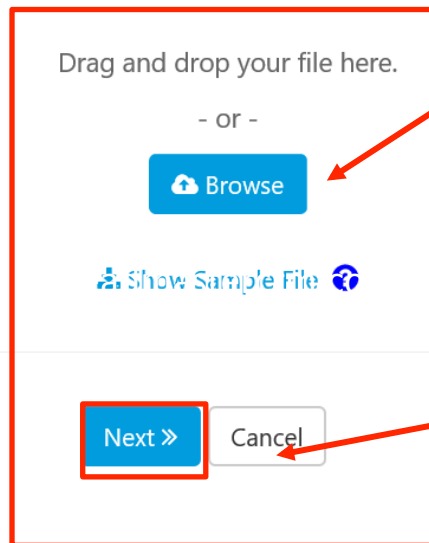
Adjust your import file to match the sample Download File.  
If you don't have data for a particular columns then add the appropriate column header and leave the rest of the column blank.

## Link to Sample File

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

File must be in .csv

# 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

# 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

# Contact details

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

The screenshot shows the LEADMASTER contact details form for a contact named 'Test3 Test3'. The form is organized into several sections:

- Primary Contact Info - Test3 Test3**
- Personal Information:** Prefix, First Name (Test3), Last Name (Test3), Title, Home Phone, Work Phone, Cell Phone, Other Phone, and Email.
- Company Information:** Company (Test3), Website, Address, Address2, Address3, City, State (- Select -), Zip, and Country (- Select -).
- Activity Information:** Date Entered (12/24/2019 7:18 AM), Last Updated (12/30/2019 9:23 AM - None), Department (- Select -), Company Revenue, Employee Size (0), Custom, and Business Owner (Temp Rep).

The screenshot shows the LEADMASTER Accounts list. The table has the following columns: Contact, Company, City, State, Country, Main Phone, Lead Status, Entered, Group, Campaign, and More Info. A red box highlights the Company column, and a red arrow points from it towards the contact details form on the left.

Contact	Company	City	State	Country	Main Phone	Lead Status	Entered	Group	Campaign	More Info
LX_Lastname,	LX_Company	LX_City	LX_State	LX_Country	9988776655	- Select -	12/27/2019	Atlantic	None	
test, test	(select)					- Select -	12/16/2019	Gulf	None	
test, testte	(select)					- Select -	12/16/2019	Gulf	None	
test, tes	(select)					- Select -	12/16/2019	Gulf	Castlewood2	



# 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

Edit Primary Contact

Actions Add

UPDATE

TT Test, Test

Date Created: 10/5/2019 Last Updated: 12/28/2019 - Temp Rep

A ★ indicates a required field

Company	Test	Address		Email	
Prefix		Address2		Department	Please Select
★ First Name	Test	Address 3		Contact ID	
★ Last Name	Test	City			
Title		State			
Cell Phone		Zip			
Work Phone		Country			
Home Phone					
Other Phone					

# Contact Options – Add a Contact

Adding contact(s) to an existing company

Edit Record

Add ▾

Contact

Appt / Call Back

Account Info

First Name

Sample

Add Contact

Actions Add UPDATE

### Primary Contact Info

A ★ indicates a required field

If you wish to make this new contact the primary contact for the record, please enter the contact details in the above fields and then click on the 'Change To Primary Contact' tab to submit.

Company	<input type="text" value="Test3"/>	Address	<input type="text"/>	Email	<input type="text"/>
Prefix	<input type="text"/>	Address2	<input type="text"/>	Department	Please Select ▾
★ First Name	<input type="text"/>	Address 3	<input type="text"/>	Contact ID	<input type="text"/>
★ Last Name	<input type="text"/>	City	<input type="text"/>		
Title	<input type="text"/>	State	<input type="text" value=""/>		
Cell Phone	<input type="text"/>	Zip	<input type="text"/>		
Work Phone	<input type="text"/>	Country	<input type="text" value=""/>		
Home Phone	<input type="text"/>				
Other Phone	<input type="text"/>				

Use primary contact address  Use primary contact phone

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

Edit Record

Add ▾

Contact

Appt / Call Back

Account Info Sample

First Name Sample

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

Add Appt / Call Back

Reminder

Call Back/Event Details

A ★ indicates a required field

Times are displayed in: (GMT -05:00) Eastern Time (US & Canada)

Type: --- None ---

Meeting / Event Name:

Phone:

Date: 10/7/2019

Time:  This is an all day or multi day event

Starts at: 9 :00 AM

Duration: 0 hrs 30 mins

Appt / Call Back: Does not repeat

Description: Type a note...

Done

# Want to upgrade to a full version?

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

Thank you,

The LeadMaster Team