LEADMASTER

Implementation Guide

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Note: Your access to certain features and functions is determined by your security profile (set by your Administrator). Depending on your access privileges, you may find that some of the options described in this document are not displayed. If you have any questions about your security privileges, please contact your LeadMaster Representative.

Introduction

LeadMaster wants you to implement our software successfully. We've found two critical factors that help our customers succeed:

- **Your dedicated LeadMaster consultant**: This person will always be your primary contact with LeadMaster. We understand how frustrating it is to call an "800" number, trying to explain your business to a complete stranger. We think if you have had this experience, you'll appreciate your dedicated consultant.

- **LeadMaster is highly customizable**: Our software is designed to be customized to fit your business, not the other way around. To make the system work for you, you'll want to have a variety of components set up and customized.

This document describes the steps we'll take to customize the LeadMaster system for your particular business needs. We will also detail the information we'll need from you.

Every customer is unique. You may not require all of the features listed in this document. Your dedicated LeadMaster consultant will provide you with a detailed list of what customizations will be used in your system.

About Passwords & Security

Security is important. LeadMaster takes every precaution to make you're your data is secure.

LeadMaster provides you with the ability to control the level of security associated with passwords. Here are the options:

1. The following password rules can be individually enabled / disabled.
2. A minimum # of characters in the password from 1 to 20 can be required.
3. Upper & Lower Case can be required.
4. A number can be required.
5. A special character (!@#$&&*_+) can be required.
6. A new password can be required anywhere between 1 and 365 days.
7. The user can be locked out after anywhere from 1 to 20 unsuccessful login attempts.
8. The user can be prevented from using previous password and the system will remember anywhere from 1 to 20 of the previous passwords used.

When a user logs in a session is established with the LeadMaster platform. LeadMaster provides you with the ability to control how long a session stays active when a computer is left unattended or there has been no interaction / updates in the LeadMaster system. The session expiration time can be set anywhere between 1 and 120 minutes. When the session times out the user is prompted with a message letting them know they've been logged off. If the user closes the browser without logging off the session will remain active. Eventually that session will timeout or if the user logs in again before the session times out, the previous session will be stopped immediately when the user logs in again. Users should always logoff.

LeadMaster also supports login restrictions by IP address. For example, you could restrict access to LeadMaster so that only computers attached to your company's network would have access. This would insure that no one could access your data unless they had the proper credentials AND their computer is attached to your company's network.

LeadMaster also has security that tightly controls the data users see and the functions they can perform on that data. For example, you may want to restrict download privileges to one or two key members of the team.

Getting Started

LeadMaster consultants are seasoned professionals. Whether your goal is simply to generate better leads or to manage your entire sales and marketing process, LeadMaster is here to help. In fact, we've helped hundreds of companies from virtually every industry.

We start with our 'Customer Implementation Meeting' where we discuss the following:

- Current business processes
- Current sales & lead management processes
- Requirements
- Goals
- Scope
- Timeline

Sample business process questions:

- Do you sell a product or service?
- What departments are going to be using the system?
    - Sales, Marketing, Customer Service...
- Definition of Hierarchy
    - Do you have direct reps or sell through distributors / partners?
    - How are your territories defined?
    - Do reps have exclusive territories?
    - Should one rep be able to see another rep's accounts?
    - Do you have more than one sales manager?
    - Should one manager be able to see another manager's accounts?
- Do you want your reps to have a login to the system?
- How many people will be using the system?
    - What are their roles?
- Who should have access to delete data?
- Who should have access to download data?
- Who should have access to email marketing?
- Do you do business with the EU?
    - RE: GDPR
- Do you want to track sales deals?

- How do you track sales deals now?
- Do you have an inside sales team?

Sample sales & lead management process questions:

- Where do your leads come from?
- How do you manage your leads?
- Do you have your sales stages defined?
- Do you want to track performance vs. quota with the system?
- What are the key performance indicators for the sales team(s)?

Sample requirements questions:

- Do you have a system in place?
- Will we be migrating legacy data from that system?
- Do you want to tie in your website?
- Will you be managing marketing campaigns?
- What type of data do you want to capture in the system?
- Do you need to integrate with other systems?
- Do you want to require strong passwords
    - Minimum # of characters
    - Require Upper / Lower Case
    - Require a Number
    - Require a Special Character - !@#$^&*()_+
    - Expire Passwords after X Days
    - Lockout after X Number of Attempts
    - Can use Previous Passwords
    - Number of Passwords Checked for Previous Use

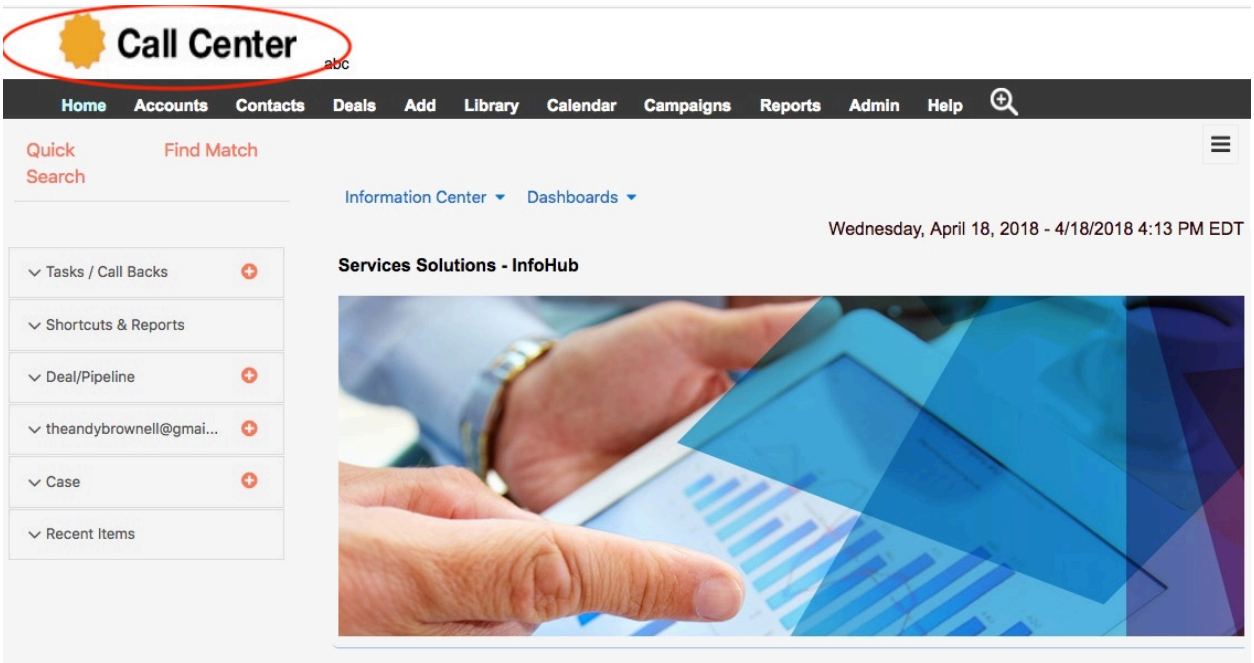
The scope and timeline will be determined largely from the questions to the above answers.

We begin to build your system by creating a secure workgroup just for you. This is where all of your data will reside. We suggest you provide us with a file of your sample data as soon as you can for the set up. We begin customization of Fields and Page Layout, Create Templates, Quotes, Custom Forms, and Workflows that were agreed upon.

After the initial set up we like to follow up with you to review the business process, templates, workflows, and custom forms to make sure it works for your business before we train the admin and end users.

Home Page & Logo Customization

We put your logo on the system.

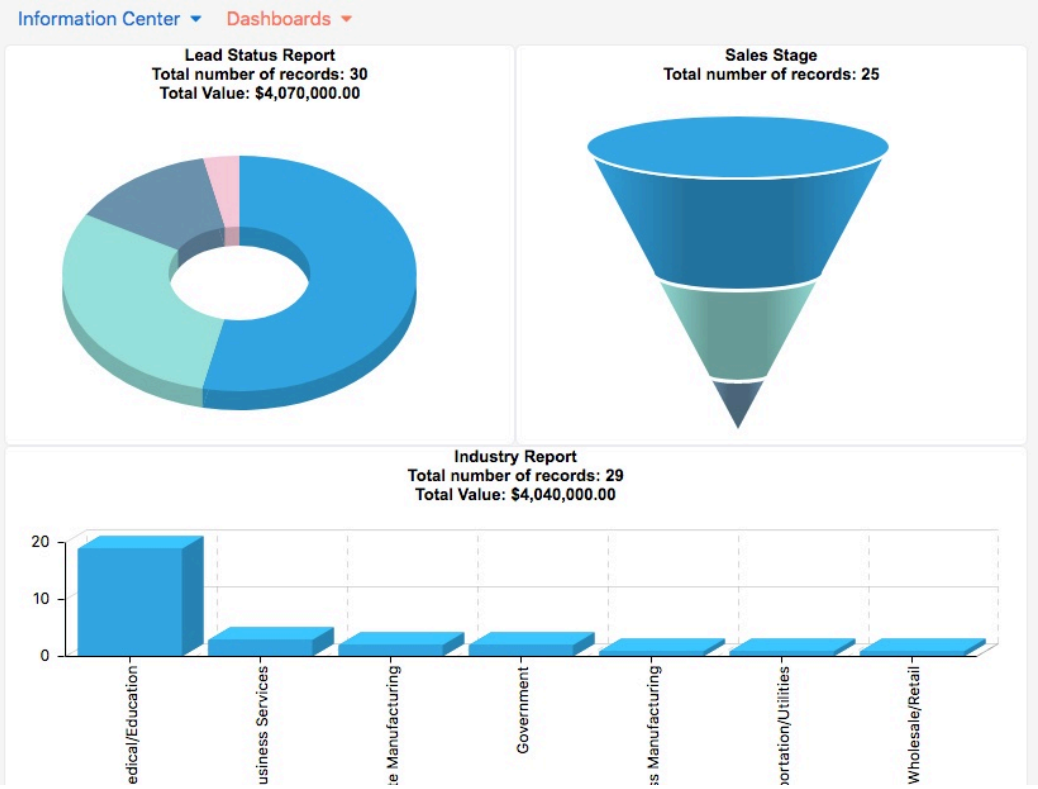


We also customize the home page.

- Information Centers – think of the information center as a custom bulletin board. There are many options.
    - User ID controls Info Center visibility. So you can have separate info centers for managers, outside reps, inside reps, support...
    - You can put internet applications like aNotePad.com (the app must work in an iframe – some things like Google prevent that)
    - Streaming news.
- Banner menu/Accordion menu
    - Accordions can be turned on / off. We suggest you only see the things you are actually going to use.
    - Titles/buttons can be changed or removed

Create Custom Dashboard Charts

We'll set up custom dashboard charts for easy reference. These charts are real-time indicators of what's happening in your business.



Some possibilities include:

- New leads
- Hot Leads
- Number of Leads per Rep
- Number of Leads per Marketing Campaign
- Deals per Rep
- Customers per Rep
- Customers per Marketing Campaign
- Calls per Rep
- Calls per Campaign
- Website Visitors by the number of pages they visited

Customize Fields & Page Layout

We create a label set just for you. We customize the field names and layout of the fields to meet your needs. We'll even show you how to do it. You can even have more than one label set – one in English, one in French, one in Spanish, one in German... Here's a list of the pages we can customize for you.

Page Customization - Page List

Custom Fields

Current Workgroup: ***LeadMaster CRM Current Label Set: LMUSA - NEW LABELS Save As

Record Pages

Visible	Page	Description
☑	Account View	Account View page
☑	Full Edit View	Full Edit View page
☐	View Record	View Record page
☑	Custom View	Custom View page

Adding / Editing CRM Elements

Visible	Page	Description
☑	Add New Record	Add New Record page
☑	Quick Edit	Quick Edit page
☑	Add / Edit Contact	Add / Edit Contact page
☑	Add / Edit Tasks/Appts	Add / Edit Tasks/Appts page
☑	Add / Edit Deal	Add / Edit Deal page
☑	Add / Edit Quotes	Add / Edit Quotes page
☑	Add / Edit Help Ticket	Add / Edit Help Ticket
☑	Add / Edit Campaign	Add / Edit Campaign page

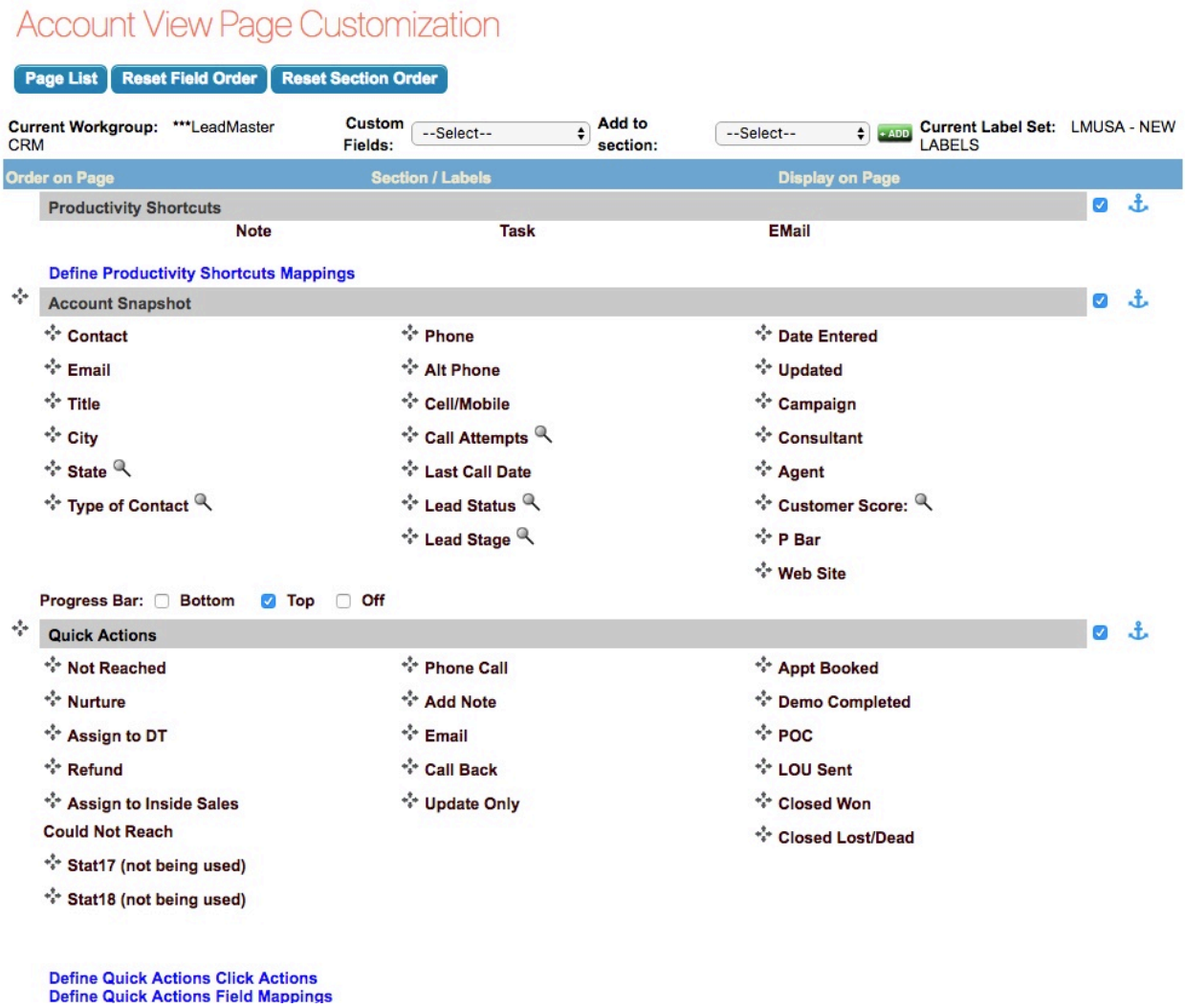
Search Pages

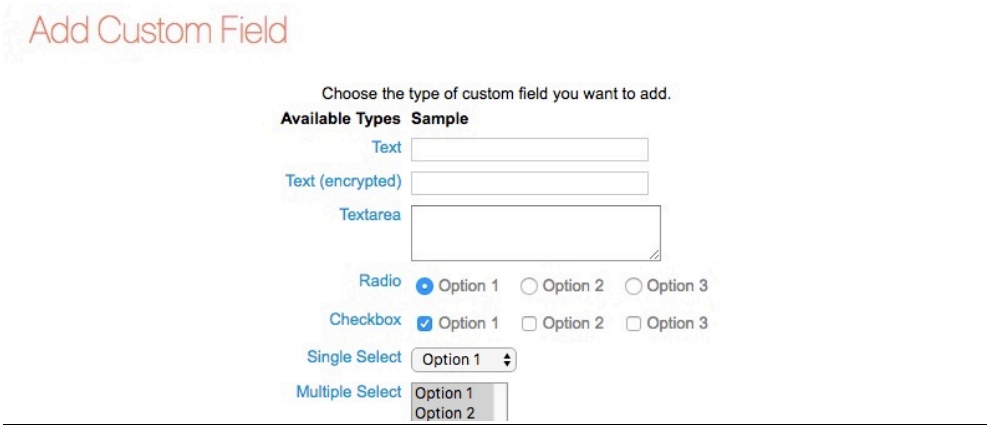
Visible	Page	Description
☑	Search Company	Search Company page
☑	Search Deal	Search Deal page
☑	Search Help Ticket	Search Help Ticket page
☑	Search Contact	Search Contact page
☑	Search Archive	Search Archive page

Admin / Other Pages

Visible	Page	Description
☑	Administration Menu	Administration menus
☑	Home	Home page
☑	Banner Menu	Top level menus
☑	Add / Edit Activity	Add / Edit Activity page
☑	Assign Company	Assign Company

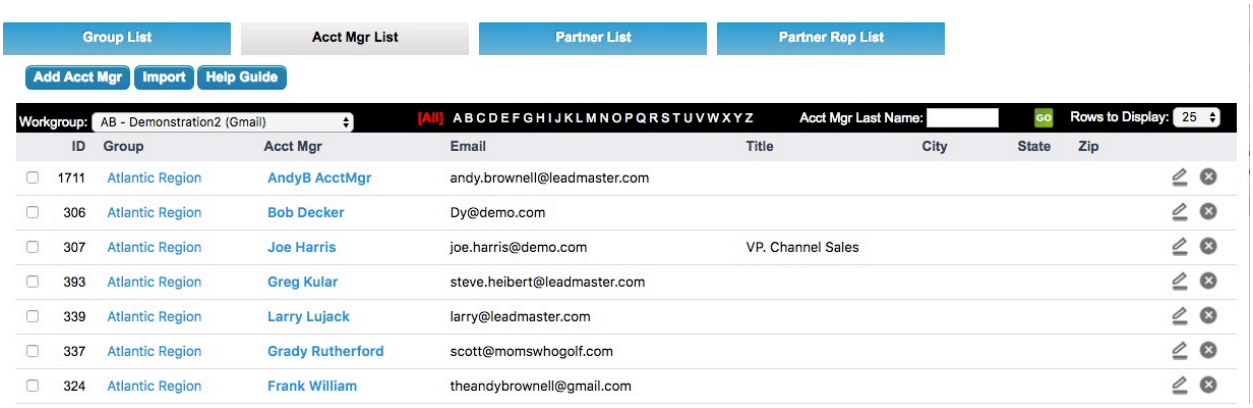
Each page customization includes custom labels, turning fields on / off, customizing the layout of the page, making sections visible / invisible, moving sections up or down on the page and adding custom fields.





Create User ID's and Establish Privileges

We enter your organizational hierarchy and territory assignments into the system. Reps can't see other reps records, managers can't see other managers records – unless specifically given permission in the system.

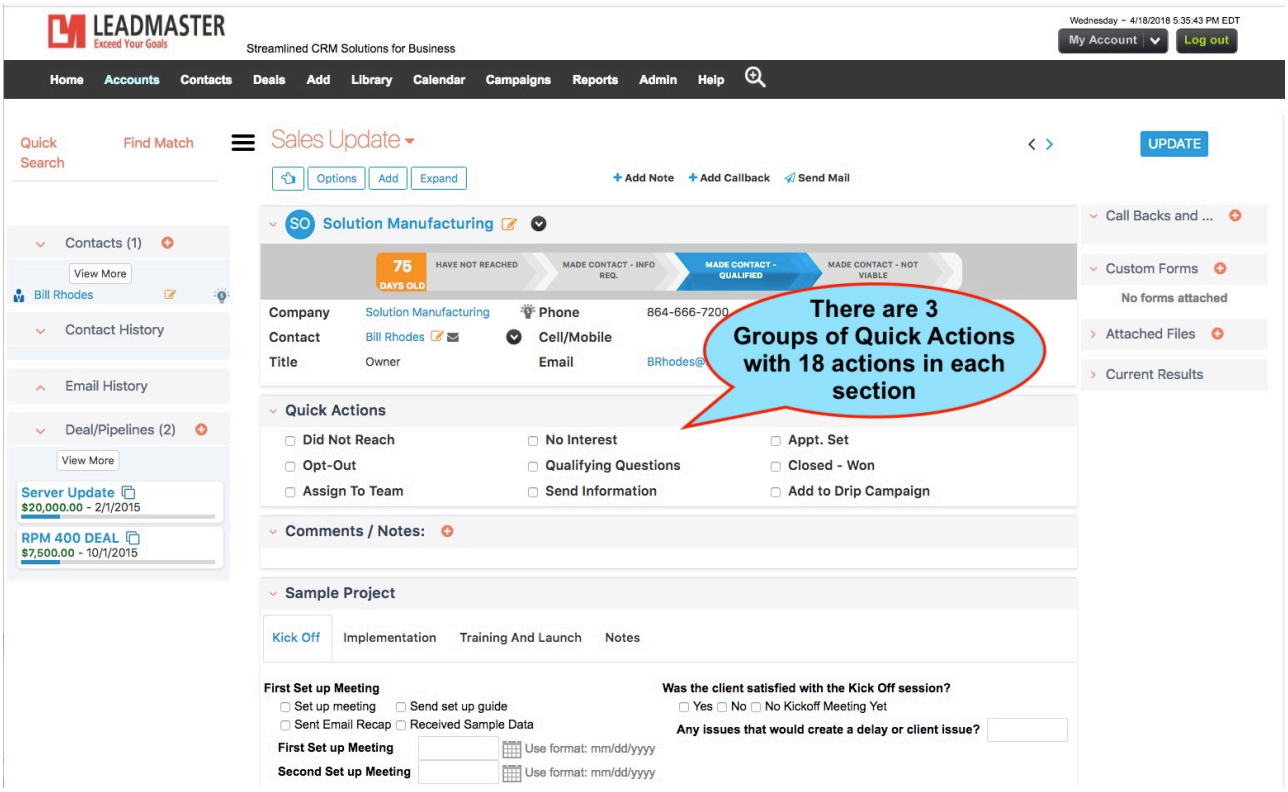


And we establish logon management privileges for those users.

- Users Configuration & Privileges
- Team Hierarchy
- User Types
  - Administrator
  - Global User
  - Organization/Group Leader
  - Account Manager
  - Partner
  - Partner Rep
- Internal Security for Data Access Rules
- User Settings & Default Configuration
  - Should they have access to delete data?
  - Should they have access to download data?
  - Should they have access to email marketing?
  - And much more is available.

Quick Action Buttons

You can consolidate repetitive steps or actions into a single click using the Quick Action buttons. LeadMaster makes it easy for you to click one button and have the system perform several actions for you.

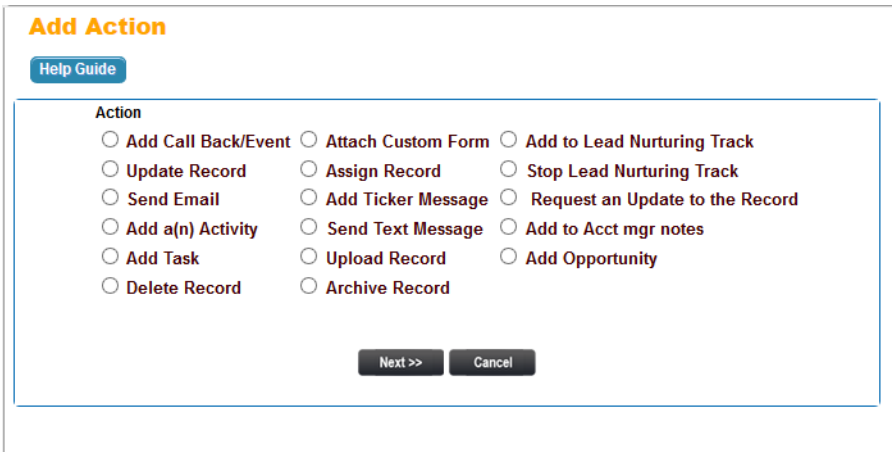


For Example: When you Click on 'Did Not Reach' LeadMaster can:

1. Prompt the appointment screen to pop up so you can add a call back or automatically add a callback to your calendar for tomorrow
2. Change the lead status from 'New' to 'Have Not Contacted'
3. Send the prospect an introductory email – the intro email will be customized for this client by using merge fields with their name, company, phone, email, area of interest – all automatically!
4. Change the initial lead grade to 'None'
5. And more…

By using Quick Actions to perform those repetitive steps we all do like sending an introductory email, you'll see a dramatic increase in performance. You'll make more calls, send more emails and win more business.

Here are actions the system can perform for you when you click a Quick Action.



Each of the radio buttons above takes you to another page where you specify exactly what should happen.

Quick Actions are useful for running searches, generating user activity reports and evaluating actions taken by your team. For example you want to save a report to the home page or home page accordion of saved reports that shows how many times each rep clicked the 'Appointment Set' Quick Action today. The timeframe for the report is variable so it will always show 'Today' without having to recreate it. There are many variable time frames available – today, yesterday, the last 24 or 48 hours, last 7 days, last 30 days, last 60 days, last 90 days, this week, this month, the 1st, 2nd, 3rd or 4th quarter and you can also say NOT in the last variable time period.

There are three Sections of Click Action Buttons (up to 18 actions in each section for a total of 54), which can be used for a specific campaign or type of user.

For example:

- Sales Actions section might be only visible to Account Managers
- Marketing Actions may only be visible to records of a certain campaign.

Setup Lead Status & Sales Stages

You can't manage what you can't measure. Using lead status and defined sales stages helps you get a handle on your business. Here are some examples for Sales Stage and Lead Status.

Sales Stage	Lead Status
Lead Assigned	Attempted
Lead Accepted	Contacted / no opportunity
Lead Re-assigned	Contacted / follow up required
Trying to make contact	Actively working
Contact Made	Pipeline
Unable to make contact 1	Forecast
Unable to make contact 2	Closed - won
Unable to make contact 3	Closed - bought from a competitor
Follow-up Request 1	Delayed
Follow-up Request 2	Contact information incorrect
Follow-up Request 3	Customer
Qualifying	Partner
Prospect	Reseller
Qualified	Affiliate
Meetings taking place	Dead
Approved budget	
Proposal submitted	
Recommended	
Approved	
Closed – Won	
Close – Lost	
Customer	
Partner	
Reseller	
Affiliate	
Dead	

We can also establish business rules as it relates to the sales stage, status codes and lead assignments. For example, if the lead has just come in from your website update the lead status to new and assign it. If the lead hasn't been updated in 20 minutes, reassign it to someone else.

Creating Custom Fields

We'll customize your fields. You can rename fields, move fields, turn fields on and off. We'll setup your reference tables to track things like sales stage (shown below), lead status, lead source, etc. With custom fields you can also create your own single & multi-select fields with custom drop down selections.

Reference Table Management

Record Update Page Customization | Add Record | Import | Help Guide

Workgroup: ***LeadMaster CRM Current Label Set: LMUSA - NEW LABELS

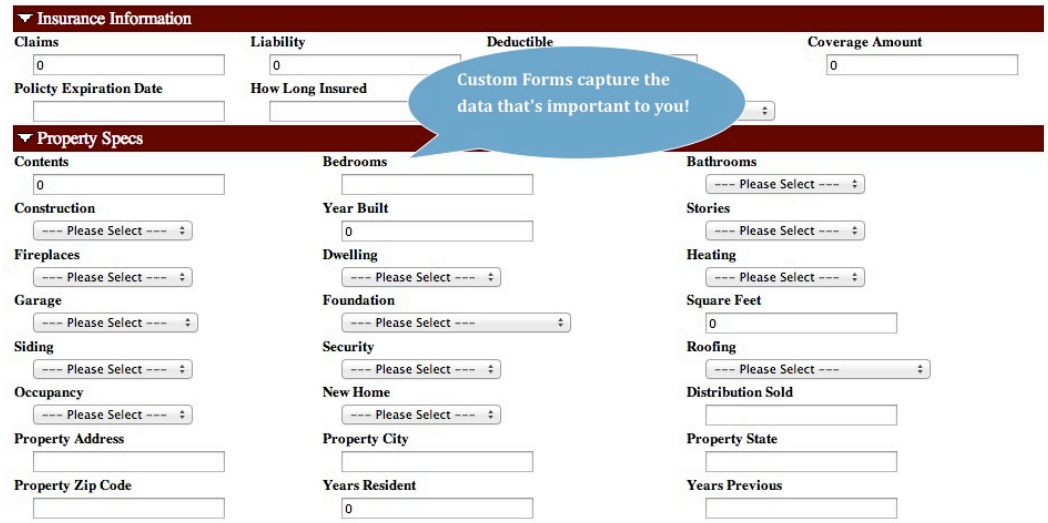
Reference Table: Company - Lead Stage Rows to Display: 25

Text Value	Sequence	Is Header	Track Aging	Text Color
New	1	No	Yes	
Contact Attempted	2	No	Yes	
Info Requested	3	No	Yes	
Appointment Set	4	No	Yes	
Demo Completed	5	No	Yes	
Opportunity Identified	6	No	Yes	
Proposal Submitted	7	No	Yes	
Verbal Agreement	8	No	Yes	
Won	9	No	No	
Lost	10	No	No	
No Opportunity	11	No	No	

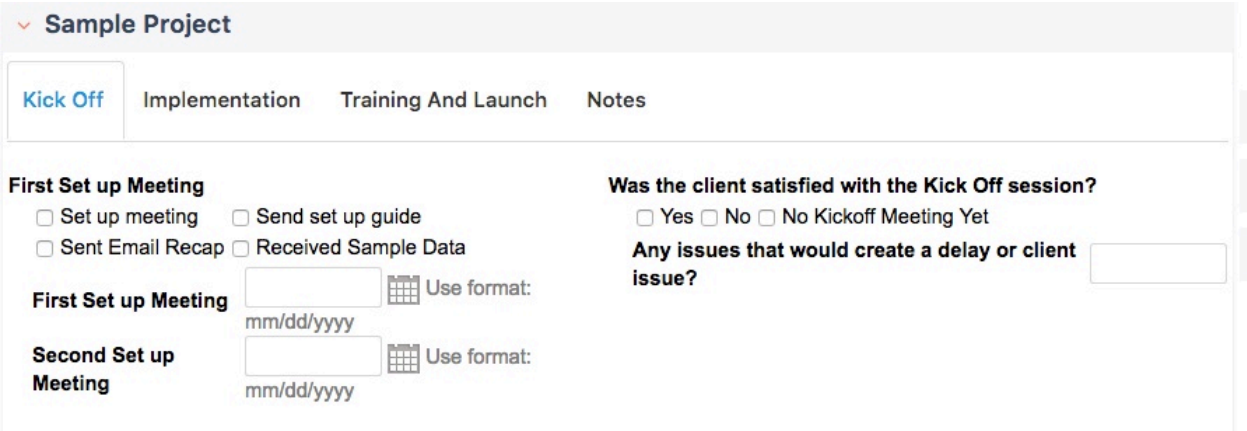
LeadMaster has fields for all of the standard things people like to keep track of. LeadMaster also has pre-defined blank fields for data specific to your business. You can also add more custom fields.

Create Custom Forms

Every business is unique so we've created custom forms. A custom form is a blank page where you can add fields of your choice. You can have as many custom forms as you want. Custom forms can be displayed either in-line so it shows with your other fields or they can be attached in a separate section and opened in a new window. We'll create custom forms to capture data specific to your business. Here's an example of a form that opens in a new window.



Custom Forms are used for additional data that you can attach to a record such as a feedback form, call script, or information pertinent to a specific campaign you are running. Here's an example of an in-line custom form with 3 tabs of information.



Campaign Setup – Marketing, Email & Lead Nurturing Campaigns

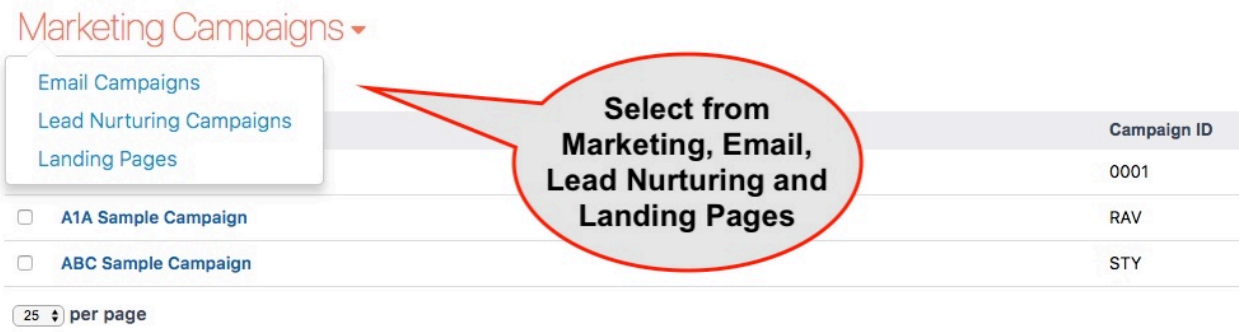
We'll setup your marketing campaigns, email campaigns. lead nurturing campaigns and landing pages.

The marketing campaigns will help you understand how much you are spending for each lead in each campaign and your cost to acquire customers via each of those campaigns.

Email marketing is a useful tool and you can send 10,000 emails for free each month (additional emails available upon request).

Lead Nurturing is a series of predefined emails that are sent at specified intervals. You may have a dozen different products. Each product should have its own Lead Nurturing track. Each track can have hundreds of emails on it. You can select one or more contacts (thousands if you like) and add them all to a Lead Nurturing track with a couple of clicks of the mouse. Sending the same message to all of your prospects sends the wrong message – send them information that is of specific interest to them with LeadMaster Lead Nurturing.

LeadMaster has built-in landing pages. They are pre-configured so all you have to do is add your logo, update the copy, update the links (to your website, social media etc.) and you are good to go!



Using LeadMaster you can create an email campaign with one of the pre-built email templates with a link to a LeadMaster Landing Page.

For example, it might be an invitation to a webinar.

- When you send the email and the user clicks on the link, it will display your LeadMaster Landing Page.

- When the user fills out the form on the LeadMaster Landing Page the data from the form (their name, email, phone etc.) will instantly and automatically be entered into the LeadMaster system.

- You can have workflow immediately send the person a confirmation email, update the record with a status of Webinar Registration and send yourself a text message with the person's name and phone number to let you know they registered so you can call them immediately if you wish.

The time between the user clicking on the submit button and you getting a text message is seconds. You can call them almost immediately after they click the submit button on the LeadMaster Landing Page. Give it a try.

Email Templates for Email Marketing

We'll show you how to use the built-in email templates and how to do email marketing.

My Email Message Templates

Add Template Add Folder Help Guide

Template Names	Subject	Status	Type	
Newsletter	Single Column Contains - This Issue, Latest News, New Features, Case Study	Active	HTML	preview | edit | delete
Introductory Email	Introducing LeadMaster	Active	HTML	preview | edit | delete
Autoresponder	Thank you [ContactFirstName] for your inquiry	Active	HTML	preview | edit | delete

Group Email Message Templates

Workgroup .....LRP301 – 30 Day Demos – Arkansas Public School Res

Sample Email Templates edit | delete

Template Name	Status	Type	
Sample Email Template	ctive	HTML	preview | edit | delete
Sample Newsletter	ctive	HTML	preview | edit | delete
Sample Email - Embedded YouTube Video	Active	HTML	preview | edit | delete
Sample Webinar Invitation	Active	HTML	preview | edit | delete

Use Global Email Templates as a starting point. These already have graphics, buttons, links , titles, multiple columns etc to make a good impression. All you need to do is add your logo and your message.

Global Email Message Templates

Template Name	Subject	Status	Type	
Sample Email - Blue Banner	Save As & Modify - Two Column, Banner, Graphic, Button	Active	HTML	preview | save as
Sample Email - Red Banner	Save As & Modify - Two Column, Banner, Graphic, Button	Active	HTML	preview | save as
Sample Email - Green Banner	Save As & Modify - Two Column, Banner, Graphic, Button	Active	HTML	preview | save as
Sample Newsletter - Blue-Green	Single Column Contains - This Issue, Latest News, New Features, Case Study	Active	HTML	preview | save as
Sample Newsletter - White	Single Column Contains - Subscribe, Back Issues,| Article Archive, Resource Center, Request Demo	Active	HTML	preview | save as

We'll show you how to create a series of emails called a Lead Nurturing Track and how to add customers to your Lead Nurturing Tracks. This is also known as drip marketing.

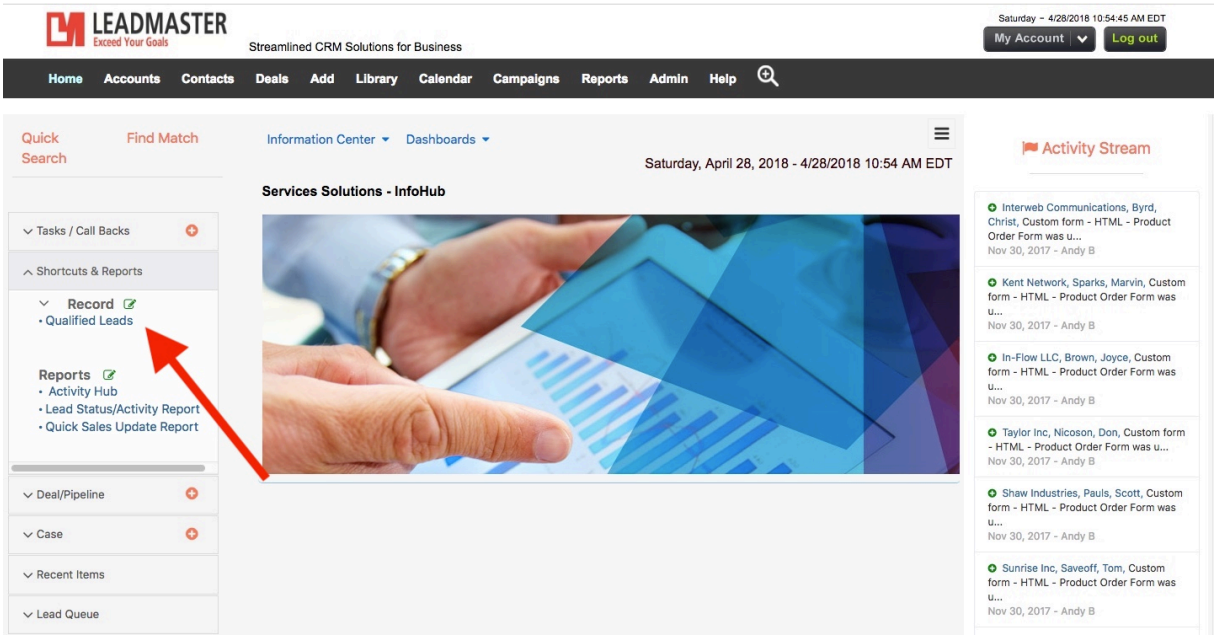
Lead Nurturing Campaign Steps

Step Order	Step Name	Days After	Type	
1	Introducing LeadMaster	0	email	edit | delete
2	Customer Feedback	5	email	edit | delete
3	Why LeadMaster?	5	email	edit | delete
4	Callback after Why LeadMaster	1	callback	edit | delete
5	LeadMaster Helps You Sell More	5	email	edit | delete
6	Seeing is Believing	5	email	edit | delete
7	Callback after Seeing is Believing	1	callback	edit | delete
8	You're going to love what LeadMaster can do	5	email	edit | delete
9	Let's Talk	5	email	edit | delete
10	Why Cloud Hosted Lead Management / CRM / Marketing Automation	5	email	edit | delete
11	Fast & Easy	5	email	edit | delete
12	Callback after Fast & Easy	1	callback	edit | delete
13	Are You Harnessing The Persuasion Power of the Inbox?	5	email	edit | delete
14	Callback after Are You Harnessing The Persuasion Power of the Inbox?	1	callback	edit | delete

Create Custom Reports & Report Subscriptions

We'll set up custom reports to help you keep an eye on your key performance indicators. We'll create report subscriptions that will deliver reports to your inbox either on a daily, weekly or annual basis.

We'll set up saved searches and saved reports so you can quickly access information at your fingertips. For example, Qualified Leads as shown below.



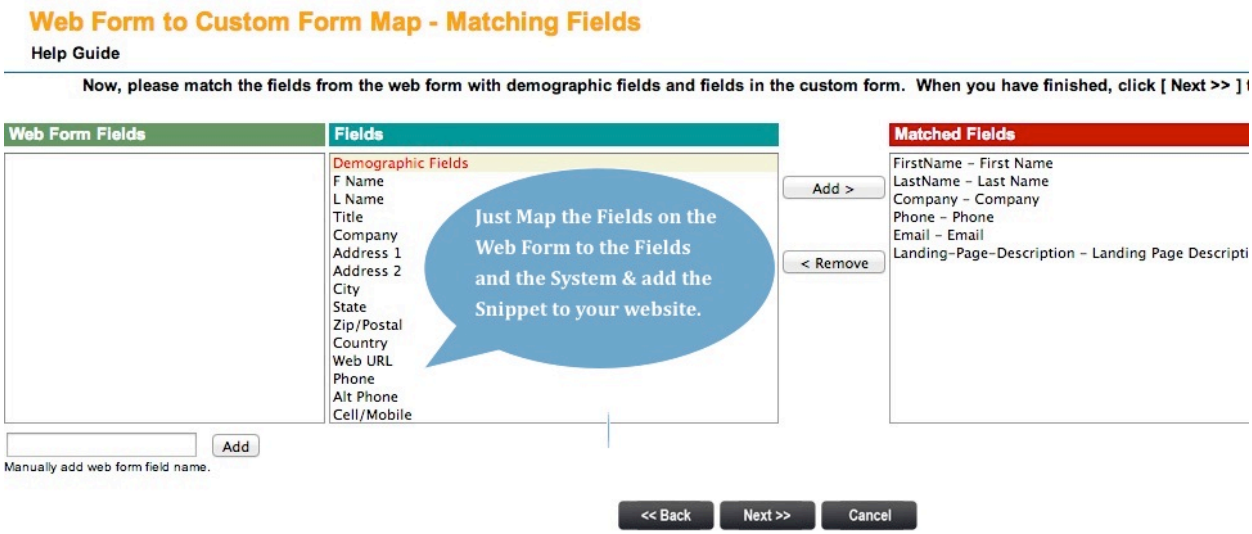
Integrate Website Forms & Landing Pages

We'll show you how to easily integrate your website forms so all the submissions flow into LeadMaster.

We have several tools for integrating your web forms with LeadMaster.

For example, the Web Form to Custom Form mapping tool (pictured below) is a point & click tool that provides you with a small snippet of code to place on your website.

Once the snippet is in place, whenever someone fills out the form the data automatically and instantly is transmitted to your LeadMaster system.



You can even get email and text message notifications when someone fills out a form. Be the first to respond to your leads and you'll close more sales!

Import Product List for Sales Opportunities & Quotes

We'll import your product list so you can track individual opportunities and produce professional looking quotes.

Sales Opportunity

ID	Opportunity	Status	Forecast Date	Close Date	Win Prob.%	Stage	Total Opportunity Value	Last Updated
11405	Jones Proposal	Active	January 2014		50%	ILLUSTRATION & PROPOSAL	$9,360.00	8/15/2013
						TOTAL:	$9,360.00	

Quotes can be emailed directly from within the system.

Add Quotes

Help Guide

Quote Details

Company: Kijak Sebastian Maciej | Date Created: n/a | Last Updated: n/a

Quote Name: Jones Quote
Quote Number: 10056
Key Contact:
Date: 8/15/2013
Discount Available:
Taxable:
Tax Rate: %
Quote Template: LeadMaster Quote Template
Create Opportunity:

Product Details

Product	Product Description	Product Code	Opportunity Product Number	Price	Quantity	Amount	
XR8000	Network Adaptor			200.00	1	$200.00	delete
T5 LCD	15			550.00	5	$2,750.00	delete
RT10 MP3	Digital Audio Player			250.00	2	$500.00	delete
					Sub total :	$3,450.00	
					Total :	$3,450.00	

Recalculate

You must click Submit at the bottom of this page in order to save any changes made to the product details section.

Comments and Terms

Comments: Thank you for the opportunity to provide you with this quote.

(max. 5000 characters)

Terms: Net 30 / 2

(max. 5000 characters)

SUBMIT Cancel

You can create your own custom quote templates. See the example below.

LEADMASTER

SALES ORDER FORM

Building Sciences

Project Information:	
Date Needed:	4/28/2018
Today's Date	Apr/28/2018
Time:	
Quote #:	Website Visitor

Client Information:			Project Information:		
Client Name:Realty, Inc.			Project Name:		
Street Address:40 Wall Street, 31st Floor			Street Address:		
City:Ny	State:New York	Zip:	City:	State:	Zip:
Phone: 646-785-5388	E-Mail:		Contact:	Phone: 646-785-5388	
Requested by: Website Visitor		Title:	Comments:		

Building Health Check™

Notes and Description

Customer would like this completed within 30 days. 10% penalty for finishing late, 10% bonus for finishing early.

AIHA LAP, LLC
ACCREDITED LABORATORY
ENVIRONMENTAL MICROBIOLOGY
ISO/IEC 17025:2005
www.aihaaccreditedlabs.org
LAB #102795

Product	Product Description	Color	Mesh Color	Roof Type	Trim Color	Sample	Product Price	Quantity	Product Amount	Date 1	Date 2	Product Code	Product Number
Scantronic2000	Flatbed Scanner	Green	Red	Shingle	Brown	Yesterday	$140.00	4	$560.00	4/3/2018	4/26/2018		

SubTotal : $560.00
Total : $560.00

Account Executive: ,	Date: 4/28/2018	Method of Payment:
Account Department:	Date:	Terms:

The Building Health-Check ™ utilizes baseline assays to screen the indoor environment.

The Final Laboratory Report is designed as a preliminary screening for potential indoor environmental issues.

Depending on the field inspection and laboratory assays, a more comprehensive study may be recommended.

*Pure Air Control Services is not responsible for repairs due to minimal invasive interstitial wall cavity inspection. Repairs to be performed by customer.

Customer Signature:_____ Date:_____

Visa #:
Mastercard #
Expiration Date:
V-Code (3 digit code on back
Cash/Check #
PO #
Nat:

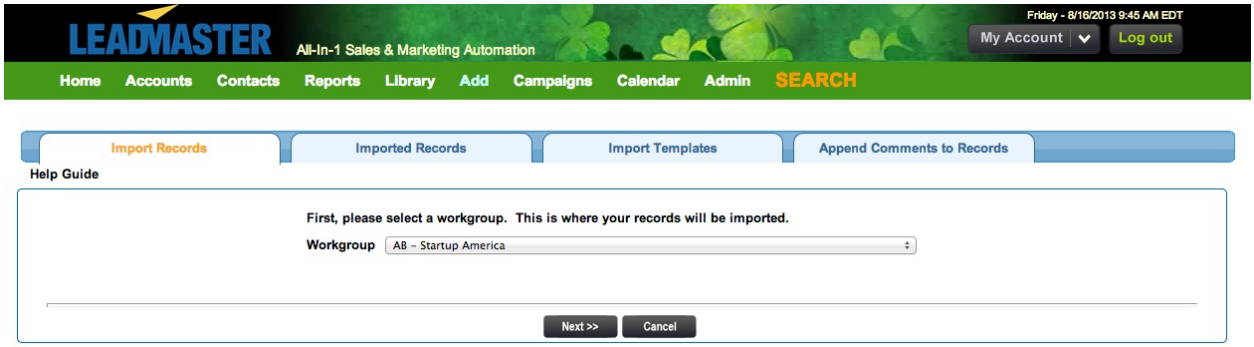
Corporate Office:

885 Woodstock Rd, Roswell GA, 30075

Phone: 1-800-699-4164 WebSite: www. leadmaster.com

Import Legacy Data

Once all of the fields have been customized, the reference tables have been defined and the custom forms created, we'll import your data.



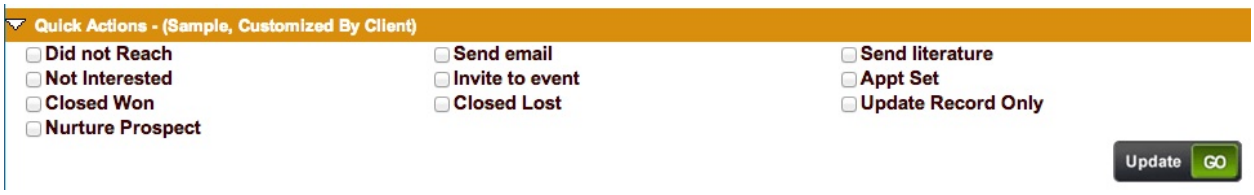
There are many options for organizing your data. It doesn't matter whether you focus on selling to businesses or consumers, LeadMaster can design the way your data is put together so that it's easy to find and manage.

Everything in LeadMaster is controlled by security privileges. If you have sales reps we'll need to assign the companies and / or contacts that were just imported in order for the reps to be able to access their accounts.

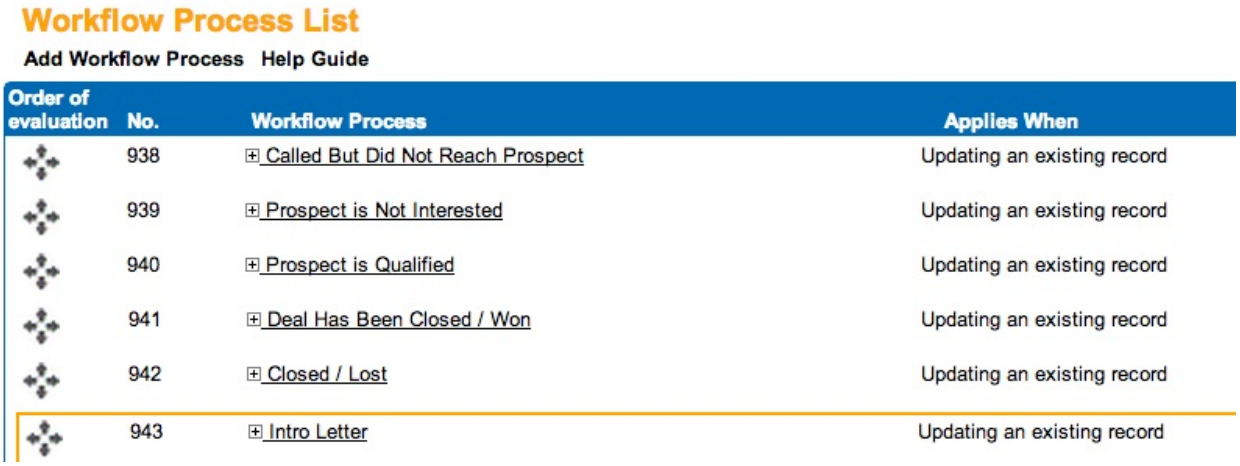
Marketing Automation & Workflows

We'll create automations and workflows, unleashing the power of LeadMaster.

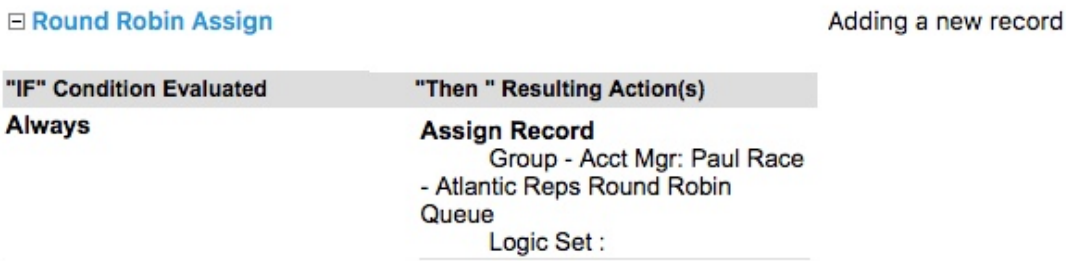
Below are examples. These are just examples, they are customized for each client.



Here's a sample list of workflows.



Here's what a workflow looks like. It's a simple, if this happens then do that. In this example, for all new records that come into the system they are assigned to reps using a round robin queue called 'Atlantic Reps Round Robin Queue'.



Workflows can be either simple repetitive tasks like:

- Adding a timestamp to the record noting that you made a phone call but did not reach them.
- Sending an email to the person you called.
- Adding a callback reminder for tomorrow.

Workflows can also be highly structured automated processes that help streamline your business. For example, suppose you are in the mortgage business. You can have workflows do the following for every lead that comes into the system:

- Send the prospect an email.
- Set the lead status to New.
- Assign the lead to a sales rep.
- If the rep doesn't follow-up on the lead in 5 minutes, reassign the lead.
- Once the rep makes contact change the lead status to In Process.
- Once the loan application is complete send it to underwriting.
- Change the status to In Underwriting.
- If the application is not approved because of a low credit rating, send the contact info electronically to a Credit Repair Company.
- Change the status to In Credit Repair.
- Add the prospect to a lead nurturing track so you stay top of mind for that prospect.
- Add a Callback reminder to your calendar for 90 days from now.

End User Training

LeadMaster provides user training in a virtual meeting. This typically is two one-hour sessions. The first session is focused on orientation and the basics of the system. The second meeting focuses on user questions and getting the most out of LeadMaster.

In addition there are 3-5 minutes training videos on specific topics located your home page of your LeadMaster CRM under the tab help/videos.

On-site training is available as an option.

Help videos are also available on YouTube and on the LeadMaster website.
https://www.leadmaster.com/help-videos/

LeadMaster Training and 'How To' Videos

Orientation Videos

- Why Choose LeadMaster
- A Quick Overview of LeadMaster
- LeadMaster on an iPhone

Getting Data into LeadMaster

- How To Add Contacts Individually
- How To Clean Data Before Importing
- Importing Contacts into LeadMaster
- Preparing Data for Import into a Single-Select
- Preparing Data for Import into a Multi-Select Part 1
- Preparing Data for Import into a Multi-Select Part 2

Identifying Website Visitors

- Lead-Xtreme
- Lead-Xtreme Lite Introduction
- Lead-Xtreme Lite In-Depth
- Lead-Xtreme Lite Form Captures

The Main Menu

- Accounts
- Contacts
- Reports
- Library
- Add New Records
- Campaigns
- Calendar Introduction

Managing the Home Page

- Managing the Info Center
- Managing Dashboards
- Quick Search

Home Page Productivity Tools

- My Calls & Tasks
- Lead Center
- My Searches
- My Reports & Charts
- Recent Items
- My Tasks
- My Cases
- My Smart Queue

Creating Account Managers & Assigning Records

- How to Create a Logon for a Sales Rep & Assign Leads, Also How to Replace a Sales Rep & Re-assign the Leads
- Assigning Accounts/Leads via Round Robin
- Shark Tank – Creating a Pool of Unassigned Leads for Reps to Claim

Smart Queue for Faster / More Productive Calling

- Introduction to the Smart Queue
- Configuring a Smart Queue
- Smart Queue & Workflow – Quick Actions
- Smart Queue Reporting

Telephone Integration

- Click-to-Call with CFBtel
- ConnectLeader Dialer Integration
- 3CLogic Cloud Call Center
- Click-to-Call with Bria Soft Phone
- Click-to-Call with Vonage
- Click-to-Call with Skype
- Click-to-Call with a Browser Plug-in
- Progressive Dialing & Smart Queue

Lead-Xpress

- What is Lead-Xpress
- Configuring LeadMaster for Lead-Xpress
- Using Lead-Xpress
- Lead-Xpress & Automation

Working with Contacts & Companies

- An In-Depth Look at the Sales Update Page
- Record Locking so Two People Can't Edit the Same Record at the Same Time
- Managing Duplicate Records

Reports

- Standard Reports
- Custom Reports
- Report Subscriptions
- Email Campaign Reports
- Advanced Reporting / Xtreme-Reports
- Activity Hub Report / Simplified
- Activity Hub Report / Advanced

Calendar

- Calendar Introduction
- Synchronizing LeadMaster & Google Calendars
- My Calls & Tasks

Email

- How to Verify Your Email Address
- Email Marketing – A Step-by-Step Guide
- Reviewing Email History for a Contact
- Using the Email Editor & Email Templates
- Using Global Email Templates & Changing Colors
- Importing Email Templates
- Background Color in Email Templates
- Email Templates for Tablets & Phones
- Sending Email from Search Results
- Email Campaign Reports
- Notification on Email Open / Click
- Tracking Emails Using Marketing Activities
- Searching for Bad Emails
- Searching for Contacts with Opened / Unopened Emails
- Creating a Document to Send Via Email using Merge Document
- Using Mail Manager to Access Your Email
- Logging Email in LeadMaster without Outlook
- Using an Alternate Email Server

Lead Nurturing

- What is Lead Nurturing & Adding Contacts
- Creating & Editing Lead Nurturing Campaigns
- Managing Lead Nurturing Campaigns

Landing Pages

- Creating Landing & Response Pages
- Map Web Forms to Custom Forms
- Creating Surveys Using Custom Forms and Landing Pages
- Editing Landing Page Templates – Form Fields, Images, Text & Links
- Sending Form Data to LeadMaster from WordPress

Case Management

- Case Management
- Configuring a Customer Support Solution

Campaign Management

Administrator Training

LeadMaster provides administrator training in a virtual meeting usually 1-2 hours long covering the following topics

- Page Customization
- Record Assignment/Hierarchy
- Logon Management
- Email Templates and Notifications
- Automation/Workflow
- Reporting
- Campaign Setup