

Ticker Message --> American Family Insurance is visiting the website

Search

GO

Info Center

Dashboard

Help / Videos

Add Info Center

Edit Info Center

Help

- > Lead Center
- > Call Backs/Events
- > Recent Items
- > My Reports
- > My Searches
- > My Cases
- > Outlook Filing Cabinet



Use LeadMaster to assign, track, manage and update all of your sales and lead management tasks for your company reps.

Lorem ipsum dolar sit amet, consectetur adipiscing elit, sed do eiusmod tempor incedidnunt ut labore et dolare magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Lorem ipsum dolar sit amet, consectetur adipiscing elit, sed do eiusmod tempor incedidnunt ut labore et dolare magna aliqua. Ut enim ad minim veniam, quis nostrud exercitacion ullamco laboris nisi ut aliquip ex ea commodo consequat.

[Ut enim ad minim veniam](#)

★ Welcome Andy Brownell

August 2011						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

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Search Companies Search Contacts

GO

Info Center

Dashboard

Help / Videos

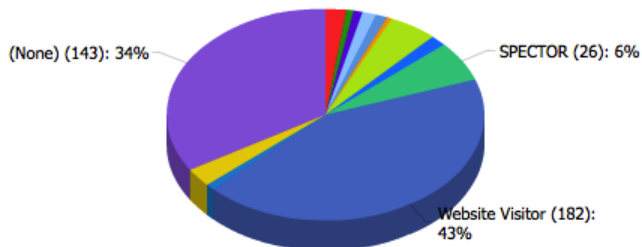
Add Chart

Edit Dashboard

Help

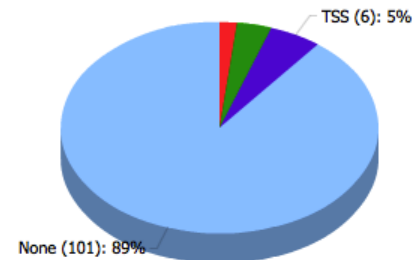
- > Lead Center
- > Call Backs/Events
- > Recent Items
- > My Reports
- > My Searches
- > My Cases
- > Outlook Filing Cabinet

Lead Sources
Total number of records: 424
Total value: \$13,073,501.02



- Referral
- Other
- DNB
- Harris Info
- Post this Recor
- Internal DB
- TSS
- Info Now
- SPECTOR
- Website Visitor
- Call In
- TEAMCO
- (None)

Webinar Status
Total number of records: 113



- Referral
- SPECTOR
- TSS
- None

Assigned accounts for partner reps
Total number of records: 424

Industry Analysis Marketing Report (Graph)
Total number of records: 98

Scroller for "ticker box" Goes Here

[Sales Update](#) [Edit Profile](#) [View Profile](#) [View Detail](#)

[My Searches](#) [Select Page](#) [Clear Page](#) [Change View](#) [Filter List](#) [Options](#) [Help Guide](#)

Primary Contact Info – Website Visitor

Name:	John Bigtime 	City:	Sunny City	Sales Manager:	Bob Black	Company Revenue	\$190,000,000
Title:	Top Banana	State:	California	Sales Rep:	Rhonda Wellstone	Employee Size:	Extra Husky Boy
Company:	Gut Buster, Inc.	Zip:	95816	Partner Rep:	Vivian Frettsworth	Unique ID:	007
Address 1:	123 Flabbergast Lane	Country:	USA	Campaign:	Road to wealth		
Address 2:		Website:	www.clientcompany.com	Phone:	916 878-0099		
Address 3:		Parent Company:	Universal Bellybulge	Cell:	530 987 7867		
				800#:	800 956-9034		
				URL:	www.yoururl.com		

[Update](#) [GO](#)

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My Reports

Standard Reports

Report Subscriptions

[Add a Custom Report](#) | [Show Me](#) | [Help](#)

Title of the Report

Filter Data for the Report No criteria set

▶ [Custom Reports](#)

▶ [Public Custom Reports](#)

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My Reports

Standard Reports

Report Subscriptions

Standard Reports

Title of Report Filter Data For Report **UPDATE** | **A A A**

▼ Sales Opportunity Reports	Content Preview	View Help
<input checked="" type="radio"/> Recurring Revenue Pipeline Report	LeadMaster Revenue metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Opportunity Forecast Report	metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Opportunity Forecast Update	Forecast metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Opportunity Highlight Report	LeadMaster Revenue metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Closed Opportunity Report	metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Opportunity Sales Stage Report (Graph)	Forecast metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Opportunity Sales Status Report (Graph)	LeadMaster Revenue metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Opportunity Detail Report	metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Opportunity Overview Report	Forecast metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Opportunity Pipeline Report	LeadMaster Revenue metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Products/Services Opportunity Forecast Report	metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Sales Team Opportunity Report	Forecast metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Win/Lost Opportunity Report	LeadMaster Revenue metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Inactive Opportunity Report	metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Download Opportunity Information	Forecast metrics on specific report, etc. info here	Preview Help
<input type="radio"/> Deal/Transaction/Book Build Forecast update (not active)	More on specific report, etc. info here	Preview Help

▶ Marketing Reports

▶ Case Management Reports

▶ Call Backs / Activity Reports

▶ Productivity / Statistics Reports

▶ Custom Reports

▶ Public Custom Reports

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My Reports

Standard Reports

Report Subscriptions

Reports | Add a Subscription | Show Me | Help Guide

Rows To Display

10 

Page Results   1 of 20  

Report	Deliver Report Every	Deliver Report	Subscription Status	Options
Daily Update Report Subscription – AB #1	Day	As a link in the email message	Active	Edit Delete Suspend
AB – All Fields	Week	As an attachment to the email message	Active	Edit Delete Suspend

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My Reports

Standard Reports

Report Subscriptions

Add a Custom Report Show Me | Help

Report Name

Report On

Is Public Yes No

Report Sequence

Workgroup Access

Workgroups

-LeadMaster CRM
-New Demo - Clone (Do not change 6)
- ...LTS - Use To Create New Demos
- ...New Clone (No Records 6)
- ..LM - Demo B2B Clone
- .DH - LM Demonstration
- .Lead-Xtreme Demonstration
- .LRP01 - .LM - CIEE (PRODUCTION)
- .LRP01 - .LM - London Relocation - (PRODUCTION)
- .LRP01 - .LM - Puget Sound Moving - (PRODUCTION)

Add >>

<< Remove

Assigned To:

Cancel Next >>

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Library

▼ Administrative Guidelines

Title	Size	Type	Modified
Admin Guidelines Report	27K	 Word Doc	8/1/2004 8:37 PM
How to Master LeadMaster	50K	 Word Doc	8/1/2004 8:37 PM
Opportunity Forecast Updating Your Opportunitites	35K	 Word Doc	8/1/2004 8:37 PM
Starting a New Campaign	22K	 PDF	8/1/2004 8:37 PM
Closed Opportunities	22K	 Word Doc	8/1/2004 8:37 PM
Sales Stage Reporting	72K	 PDF	8/1/2004 8:37 PM
Sales Status	99K	 PDF	8/1/2004 8:37 PM

▶ Company Collateral

▶ Industry Articles

▶ Marketing Literature

▶ PR

▶ Templates

▶ White Papers

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Campaign

E-Marketing

Lead Nuturing

Call Campaigns

Add Campaign | Download | Help Guide

▼ Campaign	Date Created	Campaign Manager	Company	Campaign ID	
Startup America	09/30/2010		LeadMaster	Startup America	Edit Delete
BZoneCRM	03/07/2010	Andy Brownell	LeadMaster	LM 234	Edit Delete
Software Advice	10/30/2010	LM Consultants	LeadMaster	LS-00	Edit Delete
QuinStreet	09/30/2010	Russ King	LeadMaster	QS-001	Edit Delete
Reseller Registration	03/07/2010	Andy Brownell	LeadMaster	Reseller Registration	Edit Delete
WheelHouse	10/30/2010	LM Consultants	LeadMaster	WH-001	Edit Delete
30 Day Trial Registration	09/30/2010	Russ King	Jillico	LRPT-Trial	Edit Delete
Lead Providers	03/07/2010	Andy Brownell		TG-003	Edit Delete
Compare CRM	10/30/2010	LM Consultants	LeadMaster	TG-004	Edit Delete
Gate 58 Leads	09/30/2010	Russ King		PARSE-001	Edit Delete
BuyerZone Call Center	03/07/2010			COMP 101	Edit Delete
Captera Leads	10/30/2010			PARSE-002	Edit Delete
Self Generated Leads	09/30/2010			LMA 066	Edit Delete
LeadMaster LeadCaster After Finding Contacts	03/07/2010	Andy Brownell	LeadMaster	LC-001	Edit Delete
LeadMaster LeadCaster No Contacts Found	10/30/2010	LM Consultants	LeadMaster	LC-876	Edit Delete
LeadMaster Pay Per Click	09/30/2010	Russ King	LeadMaster	LM-016	Edit Delete
LeadMaster Web Leads/LeadCaster	03/07/2010	CamoFlag	LeadMaster	LMVisiStat	Edit Delete
LM Web-Demo	10/30/2010		LeadMaster	LMWeb-002	Edit Delete
LM Web-Email Inquiry	09/30/2010		LeadMaster	LMWeb-004	Edit Delete
LM Web-Free Trial	03/07/2010	Andy Brownell	LeadMaster	LMWeb-003	Edit Delete

[26 Oct-2011- Habitat for Humanity was updated by Mark Adams]

Campaigns

E-Marketing

Lead Nurturing

Call Campaigns

[Create / Manage Email Message Templates](#) | [Launch An Email Campaign](#) | [Report On Email Campaigns](#) | [Show Me](#) | [Help Guide](#)

Show:

▼ Email Campaign Name	Date Sent	Sent	Opened	
Webinar Invite	09/30/2010 10:35 AM	299	27	Delete
LeadMaster Webinar Invitation	03/07/2010 9:55 AM	101	11	Delete
LeadMaster Webinar Invitation	10/30/2010 10:43 AM	14	3	Delete
LeadMaster Follow-up	09/30/2010 5:11 PM	1	1	Delete
LeadMaster Demonstration Invitation	03/07/2010 10:39 AM	7	0	Delete
Are you capitalizing on your sales leads?	10/30/2010 10:01 AM	2338	176	Delete
LeadMaster CRM	09/30/2010 1:52 PM	1	0	Delete

Options
Create / Manage Email Message Templates
Launch An Email Campaign
Report On Email Campaigns

[26 Oct-2011- Habitat for Humanity was updated by Mark Adams]

Campaigns

E-Marketing

Lead Nurturing

Call Campaigns

Create / Manage Lead Nurturing Tracks | Add Contacts to Lead Nurturing Track | Report on Lead Nurturing Tracks | Show Me | Help

Show:

Lead Nurturing Track Name	Status
AB - General Business Track #1 - email every 2 weeks	Active
AB - Reseller Recruiting Track	Active
Andy's CRM Lead Nurturing Track	Not Active
BK - Marketing Programs General Track	Active
Contact Identified - General Drip Track	Active
HP Solution Elite Q1FY11	Active
HP Solution Elite Q2 2011 NEW PARTNERS	Active
HP Solution Elite Q3 NEW Partners	Active
Invitation to Tuesday Webinar Lead Nurturing Track - 4 Emails, 1 week apart	Active
Jennifer's Sample Lead Nurturing Track	Not Active
JJJ Reseller Recruitment_2	Active
LeadMaster CRM Weekly Email	Not Active
Lead-Xpress #1	Active
Lead-Xpress #1 (no salutation)	Active
MC - NEW BUT HAVE NOT REACHED	Active
MC Free Trial Track	Not Active
MC Long-Term LN Track 1	Active
MOP Oct2010 Special Offer	Active
Test Drive Track #1 - Resellers (don't use - under construction)	Not Active
Test Drive Track #1 - Tony Golladay	Active
Test Drive Track #1 - Workflow Automatically Adds New Users to this Track	Active
VolPOne Limited Time Offer	Active

Options

[Create / Manage Lead Nurturing Tracks](#)

[Add Contacts To Lead Nurturing Track](#)

[Report on Lead Nurturing Tracks](#)

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Campaign

E-Marketing

Lead Nurturing

Call Campaigns

Add Campaign | Download | Help Guide

Date Created

Last Updated

Updated By

01/10/2011

01/29/2011

Andy Brownell

★ Indicates A Required Field

UPDATE

CANCEL

Campaign Manager Information

Company:

First Name:

Last Name:

Title:

Phone:

FAX:

Email:

Campaign Information

★ Campaign

★ Campaign ID

End Date

Launch Date

Campaign Detail

Days Until Reassigned

Campaign Type

Telemarketing Vendor

MRM ID

Target Industry

Target Company Revenue

Target Number of Employees

Target Contact Titles

Official Campaign Name

Projected Number of Leads

Projected Lead Percentage

Projected Leads Closed

Average Order Size

Projected Revenue

Projected Expenses

Campaign Comments

Spellcheck ON OFF (Maximum Length 5,000 Characters)

▶ Campaign Custom Character

▶ Campaign Custom Date

▶ Campaign Custom Number

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Campaign

E-Marketing

Lead Nurturing

Call Campaigns

Add Campaign | Download | Help Guide

Date Created

01/10/2011

Last Updated

01/29/2011

Updated By

Andy Brownell

★ Indicates A Required Field

UPDATE

CANCEL

Campaign Manager Information

Company:
First Name:
Last Name:
Title:
Phone:
FAX:
Email:

Campaign Information

★ Campaign
★ Campaign ID
End Date
Launch Date

Campaign Detail

Days Until Reassigned
Campaign Type
Telemarketing Vendor
MRM ID
Target Industry
Target Company Revenue
Target Number of Employees
Target Contact Titles
Official Campaign Name
Projected Number of Leads
Projected Lead Percentage
Projected Leads Closed
Average Order Size
Projected Revenue
Projected Expenses

Campaign Comments

Spellcheck ON OFF (Maximum Length 5,000 Characters)

▼ Campaign Custom Charater

Campaign Cutom Character 1	<input type="text"/>	Campaign Cutom Character 7	<input type="text"/>	Campaign Cutom Character 13	<input type="text"/>
Campaign Cutom Character 2	<input type="text"/>	Campaign Cutom Character 8	<input type="text"/>	Campaign Cutom Character 14	<input type="text"/>
Campaign Cutom Character 3	<input type="text"/>	Campaign Cutom Character 9	<input type="text"/>	Campaign Cutom Character 15	<input type="text"/>
Campaign Cutom Character 4	<input type="text"/>	Campaign Cutom Character 10	<input type="text"/>	Campaign Cutom Character 16	<input type="text"/>
Campaign Cutom Character 5	<input type="text"/>	Campaign Cutom Character 11	<input type="text"/>		
Campaign Cutom Character 6	<input type="text"/>	Campaign Cutom Character 12	<input type="text"/>		

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Search Records

Search Contacts

Search Archives

Search Custom Forms

Keyword Search - Comments:

Demographics

Company:	Select...	
First Name:	Select...	
Last Name:	Select...	
Title:	Select...	
City:	Select...	
Zip/Postal:	Select...	
Email:	Select...	
Phone:	Select...	
Revenue:	Select...	
# of EE's	Select...	
Probability:	Select...	
Lead Value:	Select...	
SIC Range:		
Keyword Search		

Metro Area

Check all Uncheck all

Option 1

Option 2

Option 3

Option 4

Option 5

Option 6

Option 7

Lead Status

Lead Stage

Campaign

SIC Range

Sales Stage

Forecast Date

State

Check all Uncheck all

Option 1

Option 2

Option 3

Option 4

Option 5

Option 6

Option 7

Sales Stage

Forecast Date

Country

Search GO

Assignment

Call Stats Web Visits

[26 Oct-2011- Habitat for Humanity was updated by Mark Adams]

Search Results

Search Archives

My Searches

Save Search

Select Records | Manage Records | Charts & Reports | Options

▼ Company	City	State	Contact	Phone	Status	More...	Entered	Campaign	Sales Manager	Sales Rep	Partner	Partner Rep
Pr Web	Bellingham	Washington	Website Visitor	205-898-0909			09/30/2010	Website Visitor	Andy Brownell	None	None	None
Pnab Ustinga	Linkgadf	Ostergalnoads Lan	Website Visitor	205-898-0909			03/07/2010	Website Visitor	LM Consultants	None	None	None
Winston Hotels Chapel Hill	Wilmington	North Carolina	Website Visitor	205-898-0909			10/30/2010	Website Visitor	Russ King	None	None	None
LP Allocation from Scotlant Online	London	London	Website Visitor	205-898-0909			09/30/2010	Website Visitor	Andy Brownell	None	None	None
Integrated Solutions	Dallas	Texas	Website Visitor	205-898-0909			03/07/2010	Website Visitor	LM Consultants	None	None	None
Jefferies & Company	New York	New York	Website Visitor	205-898-0909			10/30/2010	Website Visitor	Russ King	None	None	None
Truenet	West Chester	Pennsylvania	Website Visitor	205-898-0909			09/30/2010	Website Visitor	Andy Brownell	None	None	None
Ju You Netbar	Baoji	Shaanizi	Website Visitor	205-898-0909			03/07/2010	Website Visitor	LM Consultants	None	None	None
Totronic AG	Oberrieden	Zurich	Website Visitor	205-898-0909			10/30/2010	Website Visitor	Russ King	None	None	None
Sterling Payment Technologies	Tampa	Florida	Website Visitor	205-898-0909			09/30/2010	Website Visitor		None	None	None
Telebeep	O'Neill	Newbraska	Website Visitor	205-898-0909			03/07/2010	Website Visitor		None	None	None
Celtel Tanzania	Dar Es Salaam	Dar Es Salaam	Website Visitor	205-898-0909			10/30/2010	Website Visitor		None	None	None
Network Partners	Newmarket	Suffolk	Website Visitor	205-898-0909			09/30/2010	Website Visitor	Andy Brownell	None	None	None
Lederme/Ledemes	Copenhagen	Hovedstaden	Website Visitor	205-898-0909			03/07/2010	Website Visitor	LM Consultants	None	None	None
Konecranes OVI	Southern Finlandia		Website Visitor	205-898-0909			10/30/2010	Website Visitor	Russ King	None	None	None
Regus Management	Afcangh	Cheshire	Website Visitor	205-898-0909			09/30/2010	Website Visitor	CamoFlag	None	None	None
Intermet B.B.	Seewolde	Flevoland	Website Visitor	205-898-0909			03/07/2010	Website Visitor		None	None	None
Aranes LLC	somewhere		Website Visitor	205-898-0909			10/30/2010	Website Visitor		None	None	None
Tech Mahindra LTD	Bangalore	Kamataks	Website Visitor				09/30/2010	Website Visitor	Andy Brownell	None	None	None
BellWalaain	London	London	Website Visitor				03/07/2010	Website Visitor		None	None	None

Administration



User / Workgroup

- Automated Record Assignments
- Company Hierarchy / Assignments
- Login Management / User Security
- Manage Workgroups
- Track User Activity



Campaign / Messaging / Reports

- Campaign Management
- E-Marketing / Email / Nurturing Tracks
- Home Page / Dashboards / Shortcuts
- Lead-Xpress / Email Notifications



Automation / Customization

- Advanced Customization / Options
- Custom Forms / Quotes
- Field / Record Management
- Marketing Automation / Workflow Mgmt
- Advanced Administration