

LEADMASTER

ASSIGNMENT TABLES

The application has four levels of lead assignment: Group/Organization and Acct Mgr, Partner and Partner Rep.

For internal purposes a customer can setup a two level hierarchy by assigning an Acct Mgr to a particular Group/Organization such as a district, region or division. An Acct Mgr must belong to a Group/Organization and assignment is at the Acct Mgr level only.

For external purposes (or for an alternative internal purposes a customer can setup a two level hierarchy by assigning Partner Rep to a particular Partner. Partner Reps must belong to a Partner and assignment is at the Partner Rep level only.

[Note: User access at these assigned levels is controlled by the relationship of these tables to the user's logon privileges. This will be covered in more detail under the Logon Management section of this document]

Partner

The Partner function is where you set up a Partner. This can be reached via the Administration function in the top banner of the application. The following is the detail on the Partner screen:

ID	Partner Name	Contact	Email	ID	City	State	Phone
68	Computer Mart	Bob Baker	bbaker@computermart.com		Allen Park	MI	807-837-7200
211	Master Widgets						

New Partners can be added via the Add Record tab. Existing Partners can be edited or deleted via the Partner screen.

The Partner edit screen contains data that can be collected about a Partner for user “informational” purposes. The Company field is the only required field. A Partner needs to be set up before creating and assigning Partner Reps.

If a user logon is restricted to the Partner assignment level then that logon must be set up as a Partner level logon and the first name and last name on that logon must exactly



match the first name and last name of the Primary Contact on the Partner screen. This will be further explained in the Logon Management section of this document.

Below shows the detailed information that can be captured regarding an individual Partner:

yourlogo appears here

Home | Library | Campaigns | Change Database
 Contacts | User Settings | Search Archives | Calendar
 Reports | Add New Records | Administration

SEARCH | LOGOUT

Your Web-Based CRM Application

Back to Results | Help Guide

Edit Partner

✓ indicates a required field.

Company Information

✓ Partner: Computer Mart | Partner Type: Distributor
 Phone: 807-837-7200 | Email: info@computermart.com
 Fax: 807-837-7299 | Web Address: www.computermart.com
 Toll Free: 800-475-8723 | Logo File:
 Specialty: Healthcare application integration

Contact Information

Primary Contact

FirstName: Bob | Last Name: Baker | Title: Partner Manager
 Phone: 807-837-7215 | Fax: 807-837-7299
 Mobile: | Email: bbaker@computermart.com
 ID:

Secondary Contact

First Name: | Last Name: | Title: | Phone: | Fax: | Mobile: | Email:

Mailing Information Same as Mailing

Mail To: 23001 Adams Street | Ship To:
 2nd Floor | City: | State: | Zip/Postal: | Country:
 City: Allen Park | State: MI | Zip/Postal: 48234 | Country: UNITED STATES

Update Information

Date Created: Before 8/12/2002 | Last Updated: | Updated By:

GO

Partner Rep

The Partner Rep function is where you set up a Partner Rep associated with a particular Partner. This can be reached via the Administration function in the top banner of the application. The following is the detail on the Partner Rep screen:

yourlogo appears here

Home | Library | Campaigns | Change Database
 Contacts | User Settings | Search Archives | Calendar
 Reports | Add New Records | Administration

SEARCH | LOGOUT

Your Web-Based CRM Application

Add Record | Help Guide

Partner Rep List

Partner Rep updated

Workgroup: XYZ Widgets | [All] ABCDEFGHIJKLMNOPQRSTUVWXYZ | Last Name: | GO

ID	Partner Name	Partner Rep Name	Email	ID	City	State	Territory	Phone
576	Computer Mart	Carolyn Evans						
76	Computer Mart	Jean Pepin			Allen Park	MI	MI, OH, IL	807-837-7287
577	Master Widgets	John Sanders						

edit | delete | edit | delete | edit | delete



New Partner Reps can be added via the Add Record tab. Existing Partner Reps can be edited or deleted via the Partner Rep screen.

The Partner Rep edit screen contains data that can be collected about a Partner Rep for user “informational” purposes. The Partner Rep first name and last name are required fields. A Partner Rep needs to be “linked” to a Partner via the Company field pull-down table. Partners need to be set up before creating associated Partner Reps.

If a user logon is restricted to the Partner Rep assignment level then that logon must be set up as a Partner Rep level logon and the first name and last name on that logon must exactly match the first name and last name of the Partner Rep screen. This will be further explained in the Logon Management section of this document.

Below shows the detailed information that can be captured regarding an individual Partner Rep:

yourlogo appears here

Home
Contacts
Reports

Library
User Settings
Add New Records

Campaigns
Search Archives
Administration

Change Database
Calendar

SEARCH
LOGOUT

Your Web-Based CRM Application

Back to Results Help Guide

Edit Partner Rep ✓ indicates a required field.

Contact Information

✓ First Name Carolyn Phone
✓ Last Name Evans Fax
Title Mobile/Cell
✓ Partner Computer Mart Email
Territory ID

Mailing Information Same as Mailing

Mail To Ship To
City City
State State
Zip/Postal Zip/Postal
Country Country

Update Information

Date Created: 4/28/2005 8:12 PM Last Updated: 7/18/2007 1:45 PM Updated By: Wendy Johnstone

GO

Administer Group/Organization

The Administer Group/Organization function is where you set up an internal group or organizational level such as a region, division, district, etc. This can be reached via the Administration function in the top banner of the application. The following is the detail on the Administration Group screen:

Group List

Group updated

Workgroup: XYZ Widgets [All] ABCDEFGHIJKLMNOPQRSTUVWXYZ Last Name:

ID	Group Name	Contact	Email	ID	City	State	Zip	
45	Atlantic	Paul Race			Vienna	VA	74574	edit delete
105	Pacific	Stuart Wallberg						edit delete

Page Results: of 1

The Group edit screen contains data that can be collected about a Group for user “informational” purposes. The Group Name field is the only required field. A Group needs to be set up before creating and assigning Acct Mgrs.

If a user logon is restricted to the Group assignment level then that logon must be set up as a Partner level logon and the first name and last name on that logon must exactly match the first name and last name of the first name and last name fields on the Group screen. This will be further explained in the Logon Management section of this document.

Below shows the detailed information that can be captured regarding an individual Group:

Edit Group

✓ indicates a required field.

Back to Results Help Guide

Group Information

✓ Group: Phone:

First Name: Fax:

Last Name: Mobile:

Title: Email:

ID:

Mailing Address

Address 1:

Address 2:

City: State: Zip:

Country:

Shipping Address

Address 1:

Address 2:

City: State: Zip:

Country:

Update Information

Date Created: Before 8/12/2002 Last Updated: 7/18/2007 1:48 PM Updated By: Wendy Johnstone

Administer Account/Acct Mgr

The Administer Account/Acct Mgr function is where you set up an Acct Mgr associated with a particular Group. This can be reached via the Administration function in the top banner of the application. The following is the detail on the Acct Mgr screen:

yourlogo appears here

Home
Contacts
Reports

Library
User Settings
Add New Records

Campaigns
Search Archives
Administration

Change Database
Calendar

SEARCH
LOGOUT

Your Web-Based CRM Application
Add Record Help Guide

Acct Mgr List
Acct Mgr updated

Workgroup: XYZ Widgets [All] ABCDEFGHIJKLMNOPQRSTUVWXYZ Last Name: GO

ID	Group	Acct Mgr	Email	ID Title	City	State	Zip	
102	Atlantic	Kathleen Adams	John.Doe@xxx.com	Acct Mgr	New York	NY	29455	edit delete
141	Atlantic	Carolyn Evans	John.Smith@xyz.com	Account Manager	Orlando	FL	32801	edit delete
247	Atlantic	Tyler Smith						edit delete
248	Pacific	Mark Zaia						edit delete

Page Results: of 1

New Acct Mgrs can be added via the Add Record tab. Existing Acct Mgrs can be edited or deleted via the Account Manager Maintenance screen.

The Acct Mgr edit screen contains data that can be collected about an Acct mgr for user “informational” purposes. The Acct Mgr first name and last name are required fields. An Acct Mgr needs to be “linked” to a Group via the Group field pull-down table. Groups need to be set up before creating associated Partner Reps.

If a user logon is restricted to the Acct Mgr assignment level then that logon must be set up as an Acct Mgr level logon and the first name and last name on that logon must exactly match the first name and last name of the Acct Mgr screen. This will be further explained in the Logon Management section of this document.

Below shows the detailed information that can be captured regarding an individual Acct Mgr:

Edit Acct Mgr ✓ indicates a required field.

Acct Mgr Information	
✓ Group	Atlantic
✓ First Name	Kathleen
✓ Last Name	Adams
Title	Acct Mgr
Phone	212-773-9937
Fax	212-773-9900
Mobile	
✓ Email	John.Doe@xxx.com
ID	

Mailing Address	
Address 1	102 First Street
Address 2	34th Floor - Suite 234
City	New York
State	NY
Zip	29455
Country	UNITED STATES

Shipping Address	
Same as Mailing	
Address 1	
Address 2	
City	
State	
Zip	
Country	

Update Information	
Date Created:	Before 8/12/2002
Last Updated:	7/18/2007 1:53 PM
Updated By:	Wendy Johnstone

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