



## MANAGE WORKGROUPS

The Manage Workgroups function allows the Administrator to set up a host of different settings for each of the workgroups they have access to.

The Manage Workgroups function [if enable for the Administrator] is accessed from the Administration > Manage Workgroups hyperlink:

The screenshot shows the top navigation bar with links for Home, Contacts, Reports, Library, User Settings, Add New Records, Campaigns, Search Archives, Administration, and Calendar. A search and logout button are also present. Below the navigation bar is a header for "Your Web-Based CRM Application" with links for Upload Logo, Upload Footer, and Add Workgroup. The main content area displays a "Workgroup List" table:

ID	Workgroup	Database	Active	Email	Calendar	Track Downloads	Opportunities	
234	XYZ Widgets	LeadMaster Development	Active	Enabled	My Calendar and Group Calendar	Yes	Yes	<a href="#">edit</a>

Clicking on the edit hyperlink for any of the workgroups the Administrator is authorized to see (based on their Logon privileges) will display all of the workgroup settings that can be set for all user of a workgroup:

The screenshot shows the "Add Workgroup" configuration form with various settings:

- Database:
- Populate Tables From:
- Workgroup Name:
- Banner Logo:
- Banner Statement:
- Statement Font Color:  [color palette](#)
- Statement Background:  [color palette](#)
- Banner Background:
- Search/Login Button:
- Section Font Color:  [color palette](#)
- Section Background Color:  [color palette](#)
- Active Status:
- Mapping URL:
- Offline Client Access:
- Mobile Access:
- Collaboration:
- Calendar:
- Event Logging for Event/Callback:
- Track Downloads:
- Track Opportunities:
- Opportunity Discounting:
- Opportunity Product Recurring Revenue:
- Opportunity Not In Stock Capability:
- Display Opportunity ID:
- Lead Status Aging:  Number of Days:
- Sales Stage Aging:  Number of Days:
- Audit Fields: Check field(s) below to begin auditing.  
 Lead Status  
 Sales Stage
- Call Center Stats:   Mandatory Update  
 Add to Comment
- Contact Name Hyperlink:  (Link in the search results screen)

HTML Email	Enabled	Access To Case Management	Disabled
Record Email Logging	Enabled	Required Logon URL	<input type="text"/>
Link Acct Mgr/Rep	Disabled	Redirect to URL	<input checked="" type="radio"/> Yes <input type="radio"/> No
Timestamp Assignments	Enabled	Restricted IPs	<a href="#">None</a>
Timestamp Campaigns	Enabled	Allow Restricted IPs	<input type="radio"/> Yes <input checked="" type="radio"/> No
Clone Multiple Leads	Disabled		
Email	Disabled		

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**Reports**

Available Reports	<input type="text"/> <input type="text"/> <input type="text"/>	Has Access To:	<input type="text"/> <input type="text"/> <input type="text"/>
<input type="button" value="Add &gt;&gt;"/> <input type="button" value="&lt;&lt; Remove"/>			
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>			

[NOTE: The above shows the default setting each workgroup setting – these apply to all users]

### Column 1 Settings

- Database → Name of the database that the workgroup is to be added to
- Workgroup Name → Name that the new workgroup is to be called
- Banner Logo → This is the logo that appears in the banner on each screen - pull-down values [logo must be uploaded by support]
- Banner Statement → This is the banner text that appears just below the banner line on each screen
- Statement Font Color → Font color for the Banner Statement [color palette hyperlink]
- Statement Background → Background color for the Banner Statement [color palette hyperlink]
- Banner Background → Background color for Banner – pull-down values
- Search/Login Button → Color of Search/Login button – pull-down values
- Section Font Color → Font color of the section headers [such as Contacts, Profile Summary, Attached Files, etc.]
- Section Background Color → Background color of the section headers
- Active Status → Active/Inactive – Value of Inactive means users do not have access to workgroup
- Mapping URL → Allows for a number of mapping applications to be selected for use with the address mapping hyperlink
- Offline Client Access → Access to the Offline Client Add-On module [requires installation of additional software on user's PC]
- Mobile Access → Access to the Mobile Add-On module [requires installation of additional software on user's PC]
- [Collaboration](#) –

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- View All Event Records → Allows workgroup users to see all Event associated with the records they have access to **\*\*\*DOES NOT APPEAR ON ADD WORKGROUP SCREEN\*\*\***
- [HTML Email](#) →
- Record Email Logging → This turns on the Email History feature in the Contact detail screen
- [Link Acct Mgr/Rep](#) →
- Timestamp Assignments → This creates a Date/Timestamp message in the Sales Rep Comments field every time a record is assigned or reassigned
- Timestamp Campaigns → This creates a Date/Timestamp message in the Sales Rep Comments field every time the campaign is changed for a record
- Clone Multiple Leads → This allows for the cloning of multiple leads via the Search Results screen (default is only single lead clone via the individual lead detail screens)
- Email → This is an overall switch for allow for Daily and Express email at the workgroup level (this parameter must be set to Enable for individual users to have Daily or Express Email)

## Column 2 Settings

- Calendar → This sets whether the Calendar will be available for user logons – can be set to no Calendar, Basic Calendar, My Calendar or both My Calendar and Group Calendar
- Event Logging for Event/Callback → This creates a Date/Timestamp message in the Sales Rep Comments field when ever the Event/Callback is added or changed
- Track Downloads → This creates an audit trail record that records who and what was downloaded (audit trail is only available to application support personnel and is kept for 90 days)
- Track Opportunities → Enables the Opportunity function
- Opportunity Discounting → Adds the ability to discount by percent in the Opportunity function (discounts are controlled by the Opportunity Discount table in Manage Reference Tables)
- Opportunity Product Recurring Revenue → Allows for the ability to set up Recurring Revenue by individual product line
- Opportunity Not in Stock Capability → Allows users to set up a product line with a non predefined product by filling in the Product Description and/or Product Code and manual entering the Price
- Display Opportunity ID → Display an internal Opportunity ID (unique sequential number created by the application) that displays in the Sales Opportunity section of the detail screen
- [Lead Status Aging](#) →
- [Sales Stage Aging](#) →
- [Audit Fields](#) →
- Call Center Stats → This turns on the Call Stats feature that displays up to 18 user definable field tags (tags can be viewed and change via the Current Label Set> Label Group: Call Center Stats) – if Custom Label is blank then that Call Stat will not appear

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- Contact Name Hyperlink → Determines whether Contact Name hyperlink appears in the Search Results screen
- Account Link → Determines whether Accounts hyperlink appears in the banner
- [Access to Case Management](#) →
- Required Logon URL → Ability to define a custom URL for access to this workgroup
- Redirect to URL → Ability to redirect access via the standard URL to the required URL (if set to Yes the user will be redirected to log in via the required URL, if set to No the user will be told that their username/password is not valid)
- Restricted IPs → Ability to restrict access to application only from determined IPs or ranges of IPs
- All Restricted IPs → Activates the Restricted IPs function