LeadSquared Implementation Plan
Steps to be followed to get going with LeadSquared

Welcome to LeadSquared! The purpose of this document is to provide you step by step guidance on the setting up and using of LeadSquared.

Step 1: Order Form and your subscription plan

Check if your LeadSquared Order Form is in place and the scope of your subscription has been captured adequately. Understand which plan (Lite, Basic, Standard or Enterprise) of LeadSquared you have subscribed to. Write to success@leadsquared.com, if you have not received the order form from us.

Step 2: Establish your LeadSquared account and role

Create your LeadSquared account at http://pages.leadsquared.com/signup-for-free-trial , if you do not have one already. Once your sign-up is complete, you can login to LeadSquared web or mobile apps:

LeadSquared Web Application	https://run.leadsquared.com
LeadSquared App for Android	https://play.google.com/store/apps/details?id=com.leadsquared.nextgen
LeadSquared App for iOS	https://itunes.apple.com/us/app/leadsquared-crm/id1116979453?ls=1&mt=8

Find your account number and keep if for reference. Quote this number in all communication with us.

Step 3: Setup your Company Profile

Update Org Details	Update the basic details about your organization.	Help
Upload Logo	Put your organization logo to personalize your LeadSquared instance.	Help

Step 4: Customize Lead Fields, Stages and Sources

Update Custom Fields	Customize the lead fields. You can create new fields or edit existing ones.	Help
Update Lead Stages	Capture the stage that define your sales - from new lead to closure.	Help
Update Lead Sources	Populate the sources from which you get or expect to get the leads.	Help

Step 5: Customize Lead Add/Edit forms

Create Lead Form	Use this to customize the fields of Add Lead Form and Lead Details pages.	Help
Create Lead form on Mobile	Choose the fields and the order you want to have on LeadSquared Mobile App	Help
Create Quick Add Form	Choose the fields and the order you want to have on Quick Add Lead form	Help
Agent pop-up form ★	Customize the display of the form that pop-ups for inbound/bound phone calls.	Help

★ *Agent pop-up is applicable only if you have opted for cloud telephony integration with LeadSquared.*

Step 6: Customize Lead Activities and Scores

Update Score of Core Activities	Customize lead score of core activities like Email open/click, website visit and so on to know how active is the lead with your business.	Help
Create Custom Activities	Use this to create your own Lead Activities that sales or inside sales employees can associate with the leads.	Help

Step 7: Update Sales Activity Settings

This setting allows you to capture your sales (order, revenue, booking) in LeadSquared.

Manage products	Create the list of products/services that you sell.	Help
Sales Activity Settings	Configure basic details about your sales activities	Help
Sales Activity Fields	Customize the fields you want to see on sales activity	Help

Step 8: Customize Task Settings

Task Types	Create task types which can be used in your business as tasks and reminders.	Help

Step 10: Install Website Tracking Script

This setting will help you to track website visits of your leads.

Website Tracking Script for WordPress Sites	Use this option if your website is hosted on WordPress. We have a plugin to install our tracking script.	Help
Website Tracking Script for other Sites ★	You will need to copy/paste our tracking script on all our pages for non-WordPress websites.	Help

Step 11: Manage Website and Landing page domains

You need to add website domains that can be tracked. For each website domain you add multiple landing page subdomains.

Website Domains	Allows to connect websites to LeadSquared for tracking.	Help
Landing Page Domains	Allows to connect landing pages to LeadSquared for tracking.	Help
Multi-domain setup ★	Allows to track website visits on multiple domains.	Help

★ *Available in Standard and higher plans*

Step 12: Manage Email Link tracking domain

Email Link Tracking domain	Allows tracking of website visits after leads open email through LeadSquared	Help

Step 13: Setup Lead Quality Criteria

Lead Quality Criteria	Allows to measure lead quality using custom quality rules. It helps to identify the leads that are close to your 'Ideal customer profile'.	Help

Step 14: Setup Lead Engagement Scoring

Engagement Score ★	Allows to capture the engagement level of leads with your business. You can create your own custom rules of engagement scoring.	Help

★ *Available in Standard and higher plans*

Step 15: Setup Lead Flagging

Lead Flagging ★	Allows to identify leads that need a follow-up or escalation. Rules defined in lead flagging will help the system in analyzing leads behavior in various stages.	Help

★ *Available in Standard and higher plans*

Step 16: Email Settings

Email Categories	Allows leads to selectively subscribe/unsubscribe from specific types of emails rather than completely Unsubscribing from all emails.	Help
Landing Page Auto response	You can create a custom email template for automated email that can be sent when landing page submission happens.	Help

Step 17: Users and Permissions

Users	Allows to add, update, or delete users and assign roles and permissions to them.	Help
Groups ★	You can use this feature to model groups/teams of users with one or more managers.	Help
Permissions	Assign delete/export/import lead permissions to the different user types of LeadSquared	Help
Support Access	This feature allows the LeadSquared support team to access your LeadSquared account, if you need any assistance.	Help

★ *Available in Standard and higher plans*

Step 18: Rules and Notifications

Rules and Notifications ★	This feature allows you to automate user notifications based on lead events. For example, you can notify your sales reps whenever any lead visits pricing page of your website.	Help

★ *Available in Standard and higher plans*

Step 19: APPs

A numbers of add-on features, plugins and integrations are available in LeadSquared. You may configure them depending upon your need and subscription plan. **Note that some add-ons may cost your extra money.**

SMS Marketing App$	Allows you to send SMSs to leads from LeadSquared. SMS sending charge is applicable.	Help
Email Sync App	You can connect your email inbox with LeadSquared and capture leads and email activities.	Help
Lead Distribution Automation ★	Allows you to automatically assigns leads to users in your LeadSquared account based on pre-defined rules. The automated lead assignment can be done after lead is created, activity posted or stage changed.	Help
Facebooks Lead Ads connector$	Capture Leads from Facebook lead ads.	Help
Telephony Connectors$	LeadSquared Supports native integration with major cloud telephony vendors and also offers a generic telephony connector for others.	
Chat Connectors$	Allows you to capture leads and chat transcripts from web chat applications Olark, Zopim and LiveChat.	
Mobile App Notifications	Configure notifications that you want to see on LeadSquared mobile app.	Help
Custom Dashlet Builder ★	Allows you to build/create custom Dashlets for your account that can be used to monitor lead details from their respective custom Dashboards.	Help

★ *Available in Standard and higher plans.*

$ *Additional fee applicable*

There are many other APPs & Connectors. You can check the in our Apps MarketPlace.

Step 20: API and Webhooks

This section is relevant for developers. If you not a developer, you can skip this.

Generate API keys	The API keys are used by applications which are built on top of LeadSquared or for third party integration. When such applications need to call an API that is communicating with LeadSquared, the API keys are used to authenticate. Note: Don't share API keys with unauthorized users. API keys are equivalent to password.	Help
Webhooks	LeadSquared can send data related to Leads on events like Lead creation/update, activity, tasks etc. Webhook is a web application that can be configured in LeadSquared to receive this data.	Help
Telephony Logs ★	Allows you to view the logs of inbound/outbound calls with the lead details. This feature is only available, if you have a cloud telephony system integrated with LeadSquared	

   ★ *Applicable only if you have opted for cloud telephony integration*

Step 21: Connect your web forms with LeadSquared

You can connect your website forms with LeadSquared to capture leads. Here are the ways you can do it:

Use APIs	Use LeadSquared HTTP REST APIs to push leads and activities to LeadSquared	Help
Use Landing Page forms	Create forms in LeadSquared and embed them in your website as html or iFrame	Help

If you have website is built on WordPress, then following additional options are available:

Use LeadSquared Plugin for Contact Form 7	Help
Use LeadSquared Plugin for Gravity Forms	Help
Use LeadSquared Landing Page Form Plugin	Help

Step 22: Import Data

You can import Lead Data into LeadSquared thru csv (comma separated values) file. A CSV file can be generated from Excel spreadsheets.

Import Lead data into LeadSquared	[Help](#)

Step 23: Attend Training and start using

Our customer success team will organize a usage training for you. Attend it and get started!

Questions?

Check http://help.leadsquared.com or Write to support@leadsquared.com