Implementing LeadSquared for your business

Complete lead to revenue platform
Create Leadsquared Account

Sign up at http://go.leadsquared.com/start to create LeadSquared Trial Account

Login to LeadSquared at https://run.leadsquared.com (Bookmark it)

Get in touch with sales@leadsquared.com to convert to paid subscription plans

www.leadsquared.com/pricing
LEADSQUARED SETUP AND CUSTOMIZATION
Create Org Details

Navigate to My Account-> Settings -> Company Profile to update basic data about your organization:
Create User and Groups

Add new users and create user groups/teams

Navigate to My Account-> Settings -> Manage Users and Groups to create new users and group of users

Create Users and Assign Roles
Create Groups and Assign users to Groups

Relevant Help Pages
Manage Users
User Roles and Access Rights
Create Groups and Assign Users to Groups
Install Website Tracking Script

Website Visit Tracking script will help you track which of your leads are visiting which pages on your website.

Navigate to My Account-> Settings -> Website Tracking Script to get your unique tracking script for the website domain registered with your LeadSquared account.

Copy the script and paste it on all pages of your website just before </body> tag.

Relevant Help Pages
How to deploy Visitor Tracking Script on your website?
Help Video – Deploying LeadSquared Tracking Script
DNS Settings for Landing Pages

You landing pages are hosted by LeadSquared. The default hosting domain is http://youraccountname.viewpage.co. So a landing page “LandingPage1” will be accessible using http://youraccountname.viewpage.co/LandingPage1

Create a cName record and point to cloud.viewpage.co. For example if you domain name is yourdomain.com and cName is pages then the setting will look like

pages. yourdomain.com points to cloud.viewpage.co

After creating cName, navigate to My Account-> Settings -> Domain Settings and update the “Specify subdomain here” with the same cName.

Relevant Help Pages

How to Publish Landing Pages within your Domain Name?
Help Video – How to create and publish a landing page in LeadSquared?
DNS Settings for Email

This setting will help in accurate tracking of website visit of leads that open your emails sent through LeadSquared.

Create a cName record in the website domain registered with your LeadSquared account

**click.yourdomainname.com** points to **go.transfersecure.net**

[optional] If you are an advanced email marketer and want to do DKIM & SPF settings, contact support@leadsquared.com
Customize Lead Field

LeadSquared allows creation of custom lead fields and editing of system created field. You can map your business to LeadSquared by customizing lead field.

To create/update/delete Custom Fields, navigate to My Account-> Settings -> Manage Custom Fields

Relevant Help Pages
How to create custom fields in LeadSquared?
Help Video – Create Custom Field
Customize Lead Addition Forms

You can add leads in Lead Squared using Lead Addition Forms “Quick Add Lead” and “Add New Lead”.

All this can be done at: My Account -> Settings -> Manage Custom Fields -> Manage Forms

Relevant Help Pages
Lead Form Customization
Customize Lead Stages

Lead Stage represents the position of the lead in your marketing funnel. You can map your lead stages with LeadSquared by customizing the "Lead Stage" Field.

To customize Lead Stage, navigate to My Account-> Settings -> Lead Stage Management and update the “Active” and “Inactive” stages.

Choose one of the stages as default in Active Stage
Last stage of Active stage should mean a “Customer”. You can label it the way you want.
Inactive Stage represent leads that are dormant

Relevant Help Pages
Configure Lead Stages
Some Activities like Email Open/Click, Website visit etc. are tracked by LeadSquared automatically. The score for them can be customized at:

My Account-> Settings -> Lead Activity Management and Scoring
Setup Custom Lead Activities

You can create your own Lead Activities that sales or inside sales people can associate with the lead after the happen. Some examples:

- Positive Phone Call
- Product Demo
- Visit in Trade Show
- Meeting at Property Site

To create/update/delete Custom Activities navigate to

My Account-> Settings ->Lead Activity Management and Scoring -> Custom Notable Activities

Relevant Help Pages

How to add Custom Lead Activity and associate a Score to it?
Setup Engagement Scoring

Engagement Score is the most useful an relevant subset of Lead Score that tells you how engaged is the least in last few days

To define Lead Engagement, navigate to My Account-> Settings -> Engagement Score

In LeadSquared you can distinguish engaged vs non-engaged leads, find engagement level of list of leads, find stage-wise engagement level of leads and much

You need to choose the criteria on which “Lead Engagement” is defined

Relevant Help Pages
Setup Criteria of Lead Engagement Scoring
Help Video: How to Setup Lead Engagement Scoring and Tracking
Mining the Real Gems from your Data – Lead Scoring & Engagement Scoring
Setup Revenue Activities

LeadSquared is a complete Lead to Revenue platform. When a lead signs up for your product or service offering, you can capture Revenue associated with it. Examples

- Capture Admission when student pays fees
- Capture a subscription when a new customer signs up

To setup your Revenue Activity, navigate to My Account-> Settings -> Sales Activity Settings

You can create your own list of product/service and customize the form that captures the revenue activity

Relevant Help Pages

Sales Activity Management
CONNECT LEADSQUARED TO YOUR BUSINESS
Connect your web forms with LeadSquared

For most businesses, the website is the center of marketing. You must capture Leads from it to LeadSquared.

Leads from ALL forms of your website can be captured in LeadSquared using our web forms. You just need to create similar forms in LeadSquared get their code and replace your existing form code

Help Video – Embed a lead capture form on your website
How to Embed Lead Capture Forms on your Website?

Not only your leads with be capture, you will also get information about lead source, campaign, location etc. automatically upon form submission. The subsequent visits of the lead to your website will also be tracked by LeadSquared

You can also use our APIs to integrate your web forms by writing simple software programs in any language of your choice

We provide standard REST API and accepts JSON data.
API documentation is available at LeadSquared API Overview
Sample Code
Chat Connector: Capture your web chat Leads in LeadSquared

LeadSquared helps you get your web-chat Leads in LeadSquared. We support chat to lead integration for two popular web chat tools Olark and Zopim.

To integrate your Olark chat account with LeadSquared follow the instructions at How to use Olark Connector?

To integrate Zopim chat, the instructions are available at How to get Leads from Zopim Chat in LeadSquared?
Email to Lead Connector: Capture email sender and recipients as Leads

You can capture the sender and recipient of emails as Leads in LeadSquared through our “Markcopy Connector”.

To install and configure the Email to Lead (MarkCopy) connector, follow the steps at:

Capture Email Sender and Recipients as Leads using Markcopy Connector

- You just need to generate a unique email id in the format `XYZ@markcopy.com`
- In your email client, setup auto-forward rule to forward a copy of email to your MarkCopy email id. The Sender will be captured as Leads and email will be captured as a lead activity
- Copy the outbound emails (CC or BCC) to your MarkCopy email id. The recipients in “To” will be captured as Leads and email will be captured as lead activity.
Telephony Connector: Capture your inbound phone calls as Leads

Phone call is an important source of Leads for many businesses. LeadSquared support telephony integration to capture inbound phone call as Leads.

To setup our telephony connector, follow the steps at
How to use the Super Receptionist Connector?

Currently we support native integration with Super Receptionist product of Cloud Telephony vendor Knowlarity.
Webinar Connector: Capture Leads from Gotowebinar

Many businesses drive leads using Webinar. We support integration with Gotowebinar from Citrix to capture these leads.

To setup our Gotowebinar connector, follow the steps at

How to use the Gotowebinar Connector?

Using LeadSquared’s webinar connector you can

Connect LeadSquared landing pages to your webinar and capture registrations

After the webinar sync attendee data
CONFIGURE LEADSQUARED ADD-ONS
To configure the SMS Marketing connector, follow steps at

Configuring LeadSquared SMS Marketing Connector

The SMS templates for individual users of LeadSquared and entire organizations can be created and used.

LeadSquared supports following scenarios of engaging leads through SMS

Sending and Autoresponder SMS to leads submitting on Landing Pages
Sending a message to individual leads
Sending message to List of Leads
Setup Lead Distribution Automation Rules

LeadSquared SMS Marketing Connector helps in connecting with your lead via simple text messages.

To add and configure Lead Distribution Automation app, check Lead Distribution Automation in LeadSquared.

- Using the new Lead Distribution Automation App, you can automate the distribution of incoming Leads to your LeadSquared users by creating rules on Lead field data.

- For example, you may want to distribute leads to a group of LeadSquared users in round-robin manner based on its location, interest, budget, education.

- With Lead Distribution App, you can build a series of rules and assign leads to one specific user or to a user among group of users in round-robin manner.
Deploy LeadSquared Mobile App

LeadSquared Mobile App for Android phone can be downloaded at: LeadSquared Mobile App for Android Page

You can control the lead data fields that should appear on mobile app. Refer to Customizing Lead Data on Mobile for this customization.

The features supported in the LeadSquared Mobile App are:

- Leads (Add, Edit, View Lead Detail, Search leads)
- Manage Lead Activities
- Manage Tasks & Reminders
- Sales & Marketing Reports
LeadSquared’s Microsoft Outlook plug-in allows marketer to quickly capture new leads from their Mailbox and activities that are important from sales & marketing process into the LeadSquared System.

To add and configure Outlook Plugin, check [How to integrate Microsoft Outlook email with LeadSquared application?](#)

You can send trackable one to one emails using the plugin
You can track inbound emails in LeadSquared
MIGRATE YOUR EXISTING DATA TO LEADSQUARED
Import your Lead Data to LeadSquared

Export your existing lead data residing in your current system in excel format and save the excel as CSV file (comma separated values file).

Ensure that for the data fields you want to import are present in LeadSquared. Else create corresponding custom fields.

Here is a sample data that will work well with LeadSquared

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
<th>N</th>
<th>O</th>
<th>P</th>
<th>Q</th>
<th>R</th>
<th>S</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>First Name</td>
<td>Last Name</td>
<td>Email</td>
<td>Phone</td>
<td>Company</td>
<td>Website</td>
<td>Lead Source</td>
<td>Job Title</td>
<td>Notes</td>
<td>Lead Stage</td>
<td>Industry</td>
<td>Employee Revenue</td>
<td>Address 1</td>
<td>Address 2</td>
<td>City</td>
<td>State</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>John</td>
<td>Smith</td>
<td>john.smith1 678 600 Acme Corp</td>
<td><a href="http://www.acm">www.acm</a> Organic S &amp; CEO</td>
<td>Sample</td>
<td>Prospect</td>
<td>Business</td>
<td>$25-100</td>
<td>$10-50 Million</td>
<td>San Francisco CA</td>
<td>USA</td>
<td>94100</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Organize your existing Lead Data

Your can Import your lead data to lead Squared

Follow the steps at:

Help Video – Importing leads into LeadSquared
How can I import leads to LeadSquared?

Check http://help.leadsquared.com/?s=import if you run into any issues.
Testing & Training

LeadSquared will test your instance of the application provide Training to Administrators and users of your organization. Administrators training will cover what has been capture in this document.

User Training will cover all features of LeadSquared like:

- Adding leads
- Importing Leads
- Creating landing pages
- Connecting landing pages with your ads
- Sending Emails Campaigns
- Create Email Autoresponders
- Doing SMS Campaigns
- Managing Leads
- Segmenting Leads
- Tasks and reminders
- Lead Scoring
- Lead Activities
- Revenue Activities
- Reports
- And more....
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GO LIVE

You are good to go on using LeadSquared after training!
It takes 1 day to 7 days to finish all settings, customization and training from the time you sign up for LeadSquared.

Once you go live use following channels for support (these options are subject to your LeadSquared plan):

Web Ticket Support: [http://support.leadsquared.com/support/tickets/new](http://support.leadsquared.com/support/tickets/new)
Email support: support@leadsquared.com
Chat support: Use inbuilt chat window in LeadSquared

Phone Support:
India: (+91) 080-3075-2610
International: (+1) 848-248-4295

We provide support Mon to Fri except on public holidays
We usually respond to all support requests within one business day
Happy Marketing
Land More Leads, Close More Deals

Create your free account

sales@leadsquared.com