Getting Started with LeadSquared
Configure & Setup your LeadSquared Account

Complete lead to revenue platform
Create LeadSquared Account

Sign up at http://go.leadsquared.com/start to create LeadSquared 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
Implementation Steps

- Update Org Details
- Create Users & Groups
- Install Website Tracking Script
- DNS Settings for Email and Landing Page
- Customize lead Fields
- Customize Lead Addition Forms
- Customize Lead Stages
- Setup Lead and Engagement Scoring
- Create Custom Activities
- Setup Revenue Activities
- Connect Web forms
- Connect Web-chat
- Connect your Email
- Connect Cloud Telephony
- Connect Webinars
- SMS Marketing Connector
- Lead Distribution Automation
- Deploy Mobile App
- Outlook Plugin
- Export your existing lead data
- Import In LeadSquared
- Testing and training
- Go Live
LEADSQUARED SETUP AND CUSTOMIZATION
Navigate to My Account -> Settings -> Company Profile to update basic data about your organization. You can also upload your organization’s logo.
Create User and Groups

Add New Users, Assign Permissions and Create Teams

Navigate to My Account-> Settings -> Manage Users and Groups to create new users, assign them permissions and create group/teams of users

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
Create a **cName** record in your DNS 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?](#)
Create a cName record called “click” in your DNS and point to go.transfersecure.net. For example if you domain name is yourdomain.com and cName is pages then the setting will look like

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

After creating cName record, Login to LeadSquared and got to My Account -> Settings -> Domain Settings -> Domain Settings for Email Links and click the “Confirm New Domain” button

**Relevant Help Pages**

[Domain Settings for Email Links](#)
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”. These forms are fully customizable. You choose form fields, their order and display names.

Customize your Lead forms 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” property.

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
Setup Lead Scoring

Lead Score is a measure of how active is the lead. It is sum of activity scores of a lead. You can assign differentiated Lead Score to activities based on their relative importance.

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

Some examples of Lead Activities

**Email Link Click | Email Open | Website Visit | Landing Page Submission**

Relevant Help Pages

[How does Lead Scoring work?](#)

[Lead Scoring: Strategies and Benefits](#)

[Mining the Real Gems from your Data – Lead Scoring & Engagement 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.

To create/update/delete Custom Activities, navigate to

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

Some Examples of Custom Lead Activities

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

Relevant Help Pages

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

Engagement Score is subset of Lead Score that tells you how much really lead is engaged in recent times. You can choose your own rules of engagement scoring.

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

Engagement Score will help you distinguish the most important leads you should be focusing on.

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

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
- Capture a new hotel room booking

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
Leads from all forms of your website can be captured in LeadSquared’s web forms. You just need to create similar forms in LeadSquared and get their HTML code and replace for your form with it.

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

Connect your web forms with LeadSquared.
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?
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.
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 Super Receptionist telephony connector, follow the steps at How to use the Super Receptionist Connector?

We support telephony connectors to Ozonetel (India), Ameyo (India), CallRail (US) also. Please contact support@leadsquared.com if you wish to configure one of these.
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
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CONFIGURE LEADSQUARED ADD-ONS
Install SMS Marketing Connector

LeadSquared SMS Marketing Connector helps in connecting with your lead via simple text messages. You can send promotional and transactions SMS to leads or list of leads.

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.

Relevant Help Pages

[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

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.

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

Lead distribution can be done to a named user or in round robin manner.
You can choose to distributed leads only for leads created using certain channels (like form submissions).
You can control the lead data fields that should appear on mobile app. Follow the step at
Customizing Lead Data on Mobile to customize your mobile lead form.

The features supported on LeadSquared Mobile App are:
Leads (Add, Edit, View Lead Detail, Search leads)
Manage Lead Activities
Manage Tasks & Reminders
Sales & Marketing Reports
LeadSquared plugin for Outlook (2010 and beyond)

LeadSquared’s Microsoft Outlook plug-in allows marketer to capture leads and their email activities from outlook.

To add and configure Outlook Plugin, check

How to integrate Microsoft Outlook email with LeadSquared application?
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.

Go to Lead -> Manage Leads, click on “Import Leads” and follow the steps.

Relevant Help Pages
- How can I import leads to LeadSquared?
- Help Video – Importing leads into LeadSquared
Testing & Training

Test your LeadSquared account after you finish the setup. Contact support@leadsquared.com if you need any help.
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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.
Land More Leads, Close More Deals

Complete lead to revenue platform