

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

Step 1: Log on to LeadSquared

Log on to LeadSquared using your username and password at run.leadSquared.com. If you do not have your login credentials, please check with your LeadSquared Administrator.

Step 2: Update your Personal Settings

Update your Profile	Manage your personal details	Help
Update your Password	Update your LeadSquared password	Help
Update Email Signature	My Email Signature	Help
Manage Report Subscriptions	Allows you to manage which reports you want to subscribe	Help
View Request History	Allows you to view history of all bulk export, delete and other requests	Help

Step 3: Customize Lead Stages and Sources

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 4: 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 5: Customize Sales Activity Settings

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 6: Manage Task Types

Manage Task Type	Allows you to manage multiple Task Types and configure their properties	Help
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Step 7: Manage Tags

Manage Tags	Allows you to manage marketing tags	Help
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Step 8: Install Tracking Script

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

**Available in Standard and higher plans.*

Step 9: 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 sub-domains.

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 10: Manage Email Link tracking domain

Email Link Tracking domain	Allows tracking of website visits after leads open email through LeadSquared.	Help
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Step 11: 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
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Step 12: 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
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**Available in Standard and higher plans*

Step 13: 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
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**Available in Standard and higher plans.*

Step 14: 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 15: Rules & 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
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**Available in Standard and higher plans*

Step 16: Manage the Content in LeadSquared

Email Library	Allows you to create templates for Email communication.	Help
Images and Documents	Allows you to manage the images and documents which is used in LeadSquared. These are used in the landing page designer and email composer.	Help

Step 17: Manage the Marketing Features of LeadSquared

Email Campaign	Allows you to design and create feature rich Email Campaigns which can be scheduled, tracked and analyzed.	Help
Drip Campaign	Allows you to send automated Emails triggered by events.	Help
Landing Pages	Allows you to create Landing Pages and analyze lead conversions	Help
Website Widgets	Allows you to create various website widgets for lead capture.	Help

Step 18: Manage the Leads in LeadSquared

Manage Leads	Allows you to create and manage leads at one place. It also allows you to manage lead activities.	Help
Manage Tasks	Allows you to create tasks and reminders for your leads.	Help
Manage Lists	Allows you to categorize your leads into various lists based on your preference.	Help

Step 19: Manage Reports & Dashboards

Dashboards	Allows you to capture the important marketing and sales indicators in a chosen time-frame.	Help
Reports	Provides analytics around marketing and sales to help you fine tune your business processes using various reports.	Help

Step 20: Attend Training and Start Using

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

Questions?

Check help.leadsguard.com or write to support@leadsguard.com for any queries.