

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 Sales User.

### Step 1: Log on to LeadSquared

Log on to LeadSquared using your username and password at [run.leadSquared.com](http://run.leadSquared.com). If you do not have your login credentials, please check with your LeadSquared Administrator.

### Step 2: Manage Essential Settings

<a href="#">Update your Profile</a>	Manage your personal details	<a href="#">Help</a>
<a href="#">Update your Password</a>	Update your LeadSquared password	<a href="#">Help</a>
<a href="#">Update Email Signature</a>	This Email signature is used in all Email communications from the LeadSquared application.	<a href="#">Help</a>

### Step 3: Manage Leads

<a href="#">Manage Leads</a>	Allows you to create and manage your leads in a single place.	<a href="#">Help</a>
<a href="#">Quick Add Lead Form</a>	Allows you to create leads with basic details.	<a href="#">Help</a>
<a href="#">Add New Lead Form</a>	Allows you to create leads with the all the details.	<a href="#">Help</a>
<a href="#">Import Leads</a>	Allows the bulk import of leads into LeadSquared	<a href="#">Help</a>
<a href="#">Quick Search</a>	Allows you to quickly search for leads from any page using the Global/Simple/Quick search available on the Main Menu.	<a href="#">Help</a>
<a href="#">Advanced Search</a>	Allows you to search leads, that satisfy one or more conditions.	<a href="#">Help</a>
<a href="#">Actions</a>	Allows you to perform various grid and row actions from the Manage Leads window	<a href="#">Help</a>
<a href="#">Quick Filters</a>	Allows you to find leads based on specific criteria quickly and easily.	<a href="#">Help</a>
<a href="#">Manage Lead Details</a>	Allows you to view and manage all lead details and activities	<a href="#">Help</a>

## Step 4: Manage Tasks

<a href="#">Create and Manage tasks</a>	Allows you to create and schedule tasks and reminders for leads.	<a href="#">Help</a>
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## Step 5: Manage Lists

<a href="#">Lists</a>	Allows you to create and manage lists for leads	<a href="#">Help</a>
Static Lists	Allows you to create lists with fixed number of Leads	<a href="#">Help</a>
Dynamic Lists	Allows you to create lists with specific criteria.	<a href="#">Help</a>
Send SMS	Allows you to SMS to leads in the list.	<a href="#">Help</a>
Send Email	Allows you to send Email to leads in the list.	<a href="#">Help</a>
Bulk Update	Allows to perform bulk update on a desired field within the list.	<a href="#">Help</a>

## Step 6: Dashboards and Reports

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

## Step 7: Other Features & Settings

<a href="#">Manage Report Subscriptions</a>	Allows you to manage which reports you want to subscribe	<a href="#">Help</a>
<a href="#">View Request History</a>	Allows you to view history of all lead import, export, and delete request made by you.	<a href="#">Help</a>
<a href="#">Manage Users</a>	Allows you to create and update other sales users.	<a href="#">Help</a>
<a href="#">View Blocked Email Addresses</a>	View the Email Addresses which are blocked from Emails being sent	<a href="#">Help</a>
<a href="#">Block Email Domains</a>	Allows you to block Email domains from Emails being sent.	<a href="#">Help</a>
<a href="#">Manage API Keys</a>	Allows you to manage your API keys	<a href="#">Help</a>

<a href="#">Apps</a>	View the add-on features, plugins and integrations available in LeadSquared.	<a href="#">Help</a>
Connect My Inbox	Allows you to capture leads and track email activities in LeadSquared. If you do not see this feature under Apps, please check with your LeadSquared Administrator.	<a href="#">Help</a>

## **Step 9: Attend Training and Start Using**

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

### **Questions?**

Check [help.leadSquared.com](http://help.leadSquared.com) or write to [support@leadSquared.com](mailto:support@leadSquared.com)