leadsquared

Get Started with LeadSquared

Guide for Admin Users

Complete lead to revenue platform

Bookmark LeadSquared Login Page

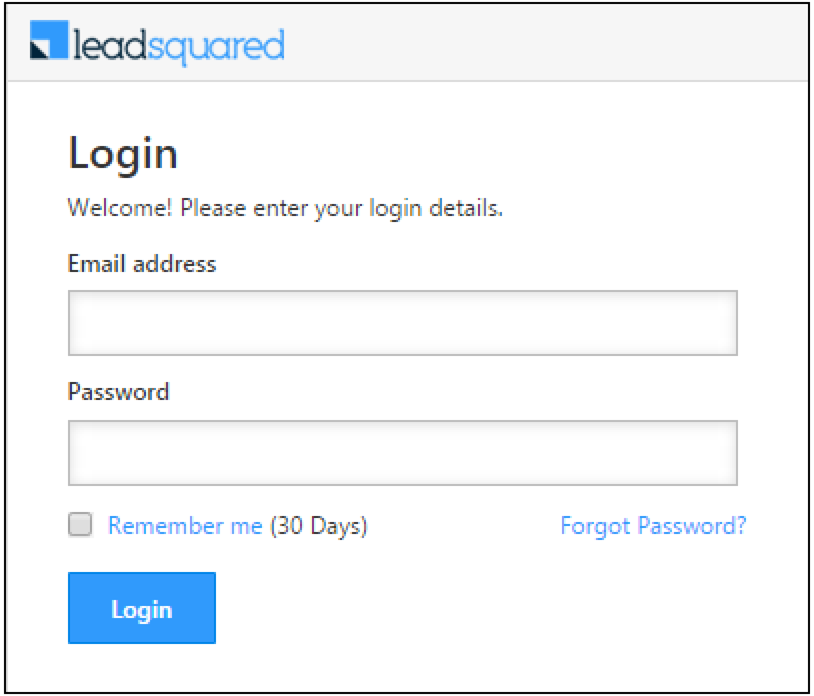
Login to LeadSquared at

https://run.leadsquared.com

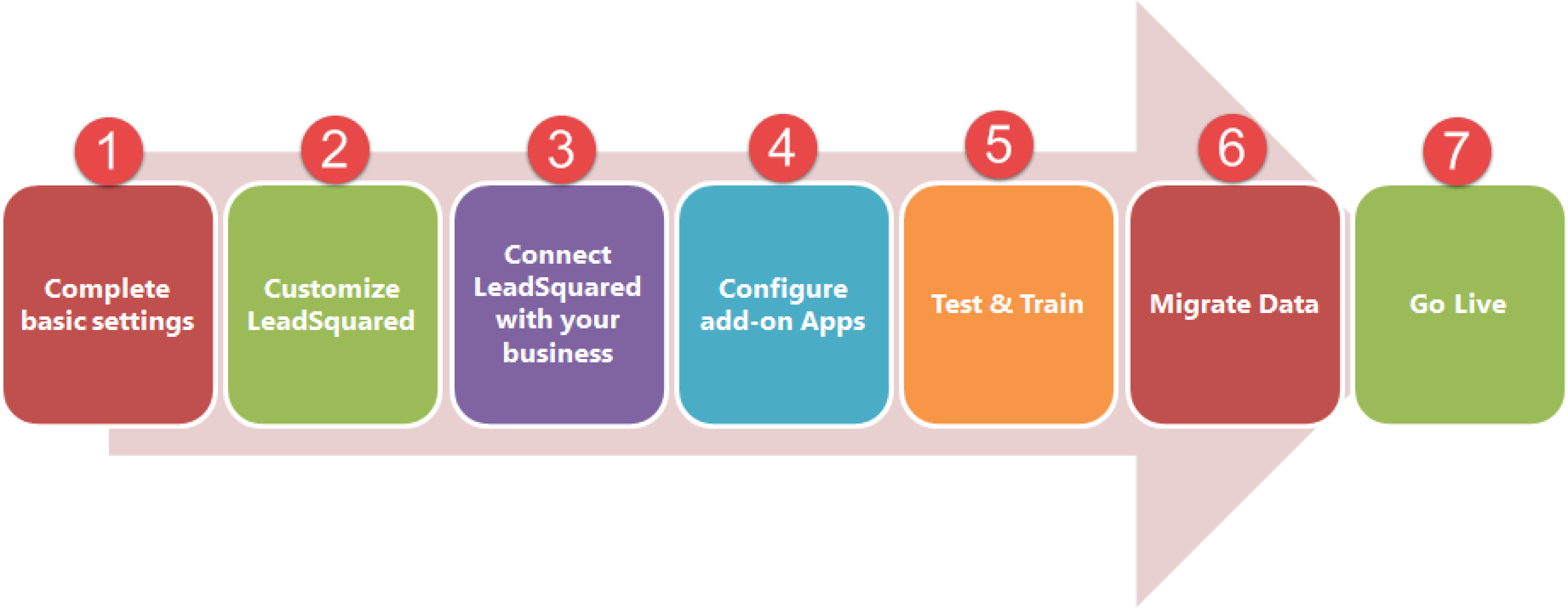
(Bookmark the URL)

LeadSquared provides best experience in:

- *Google Chrome*
- *Mozilla Firefox*
- *Mac Safari*



Steps to Get Started

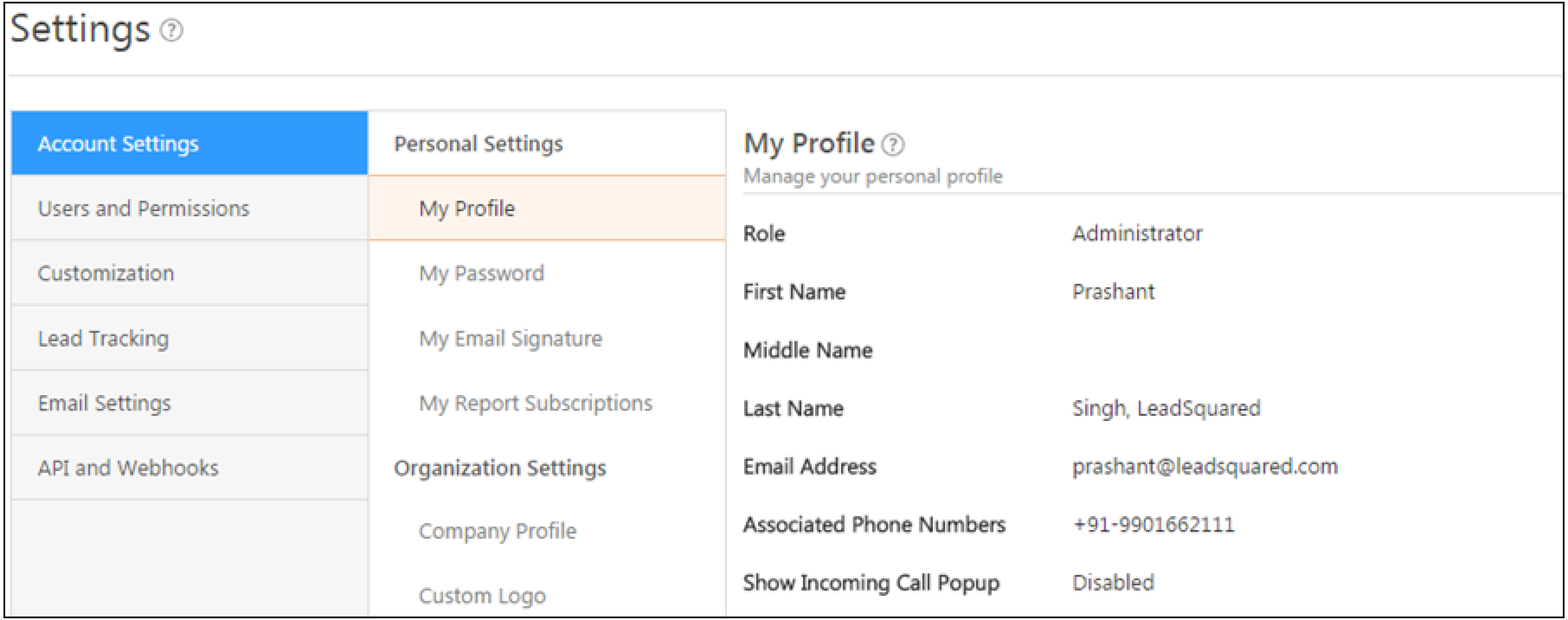


1- Basic Settings

Update Your Profile

Update your own name, phone number, date format and time-zone preferences.

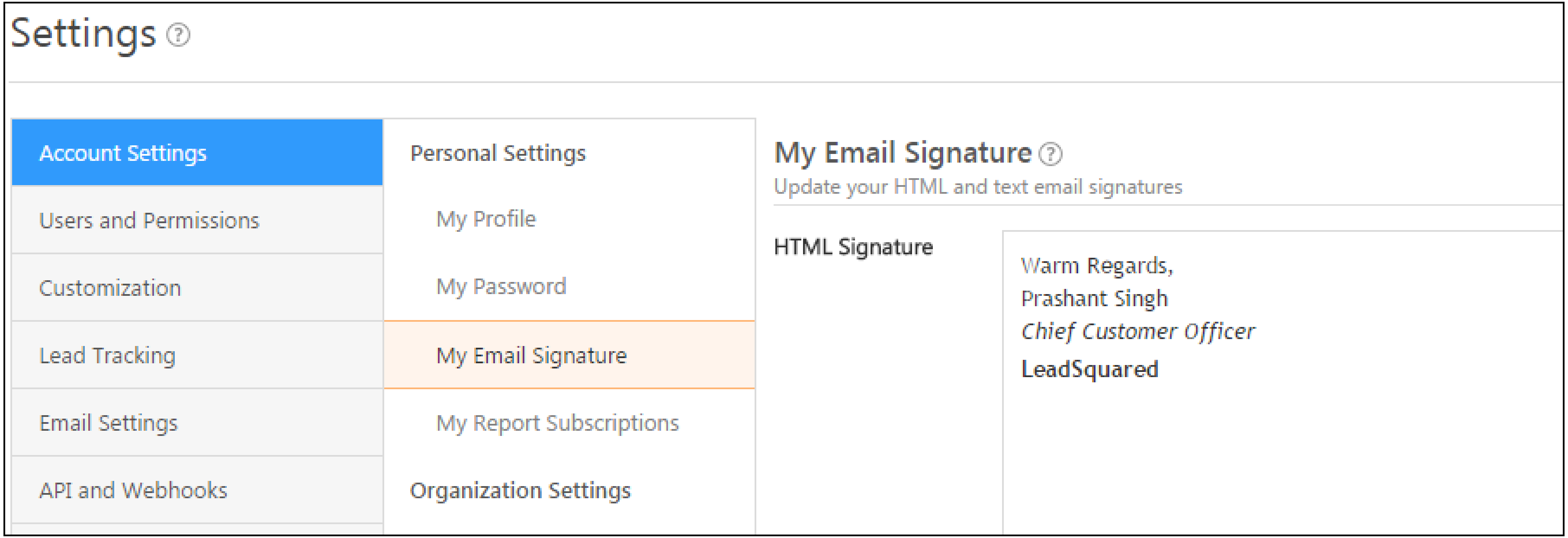
Navigate to [My Account-> Settings -> My Profile] to update your user profile.



Create Your Email Signature

You can create your signature that can be used in outgoing Emails from LeadSquared

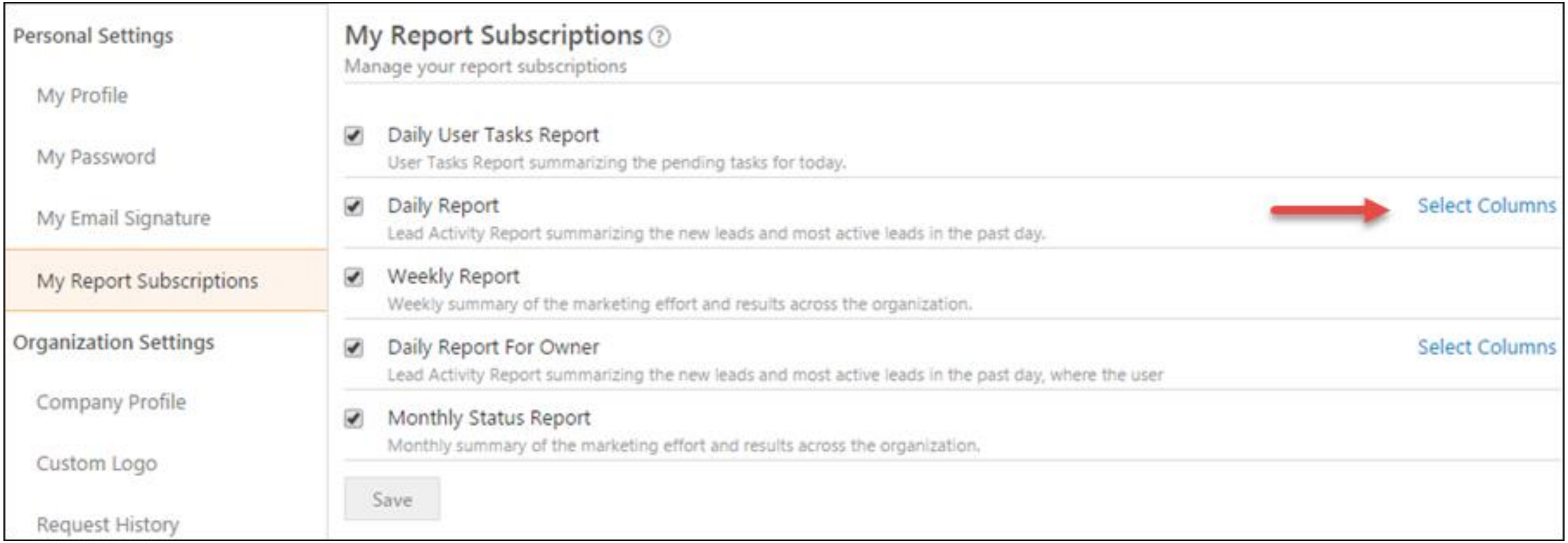
Navigate to My Account-> Settings -> Account Settings- > Personal Settings ->Signature to update your Email Signature.



Manage Your Report Subscriptions

You can select which scheduled daily/weekly/monthly reports you want to receive

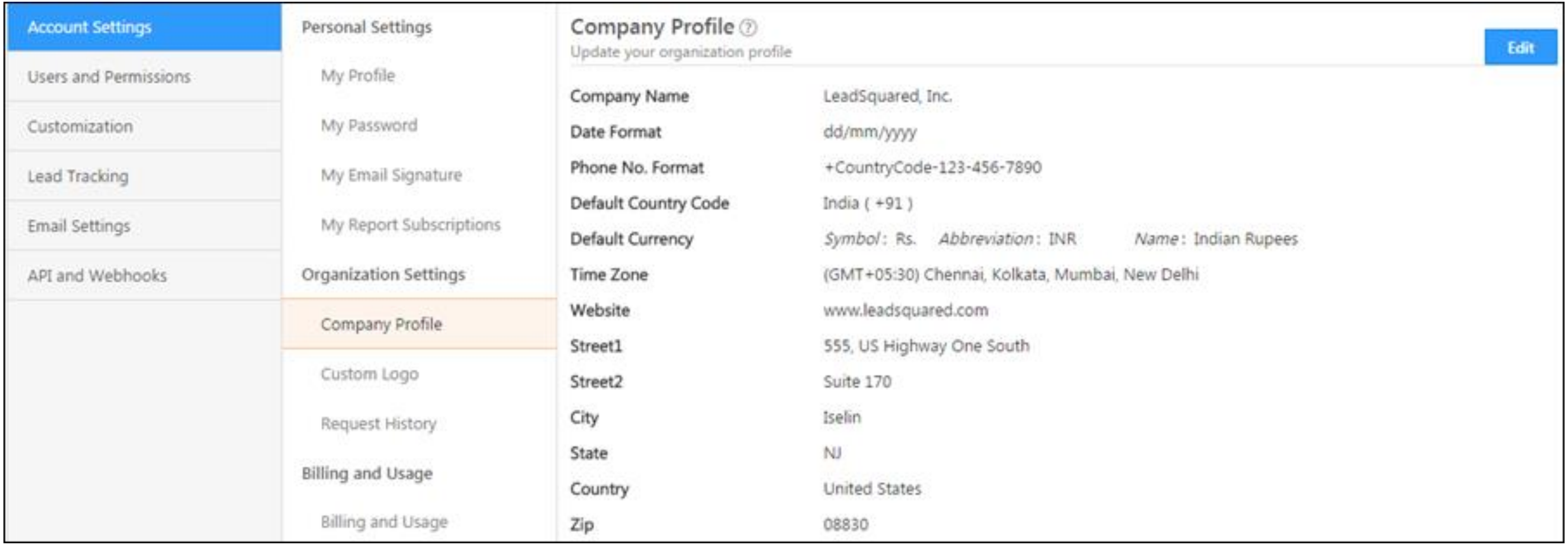
Navigate to My Account-> Settings -> Account Settings-> Personal Settings ->My Report Subscriptions to subscribe / unsubscribe to report subscriptions.



Update your Organization details

Review & Update the profile information about your organization

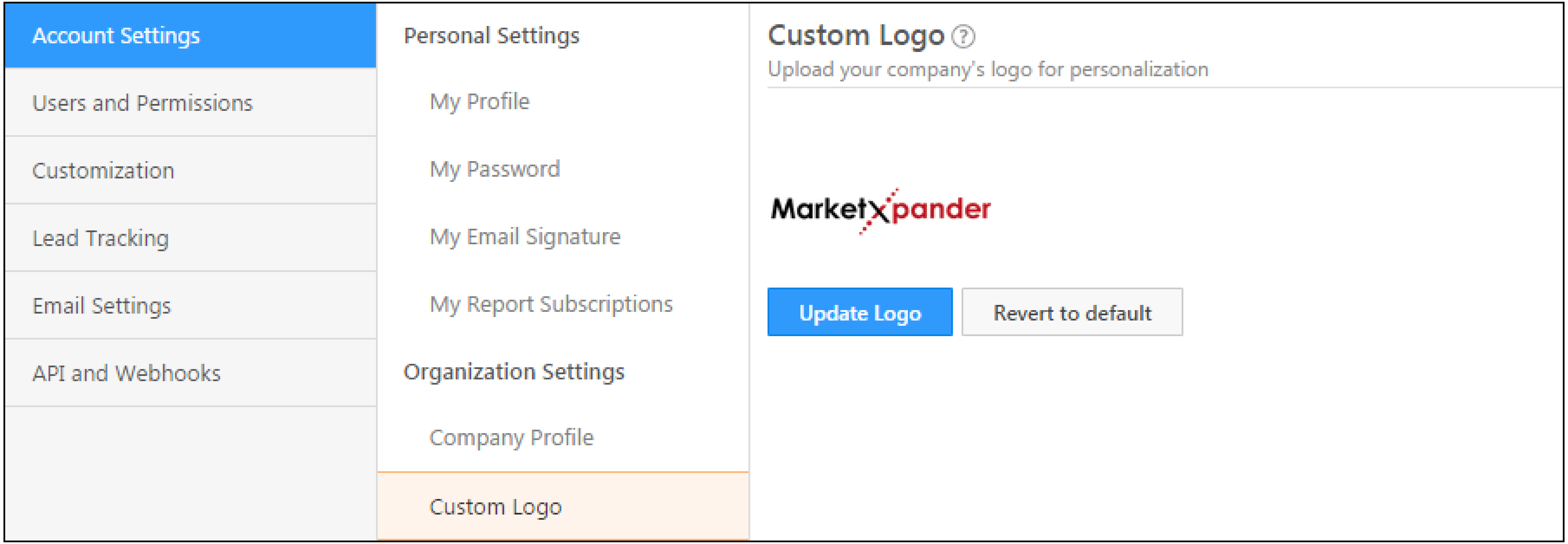
Navigate to My Account->Settings->Account Settings->Organization Settings->Company Profile to update basic data about your organization



Upload your own logo to personalize LeadSquared

Use Custom Logo Setting under Company Profile to upload your own logo

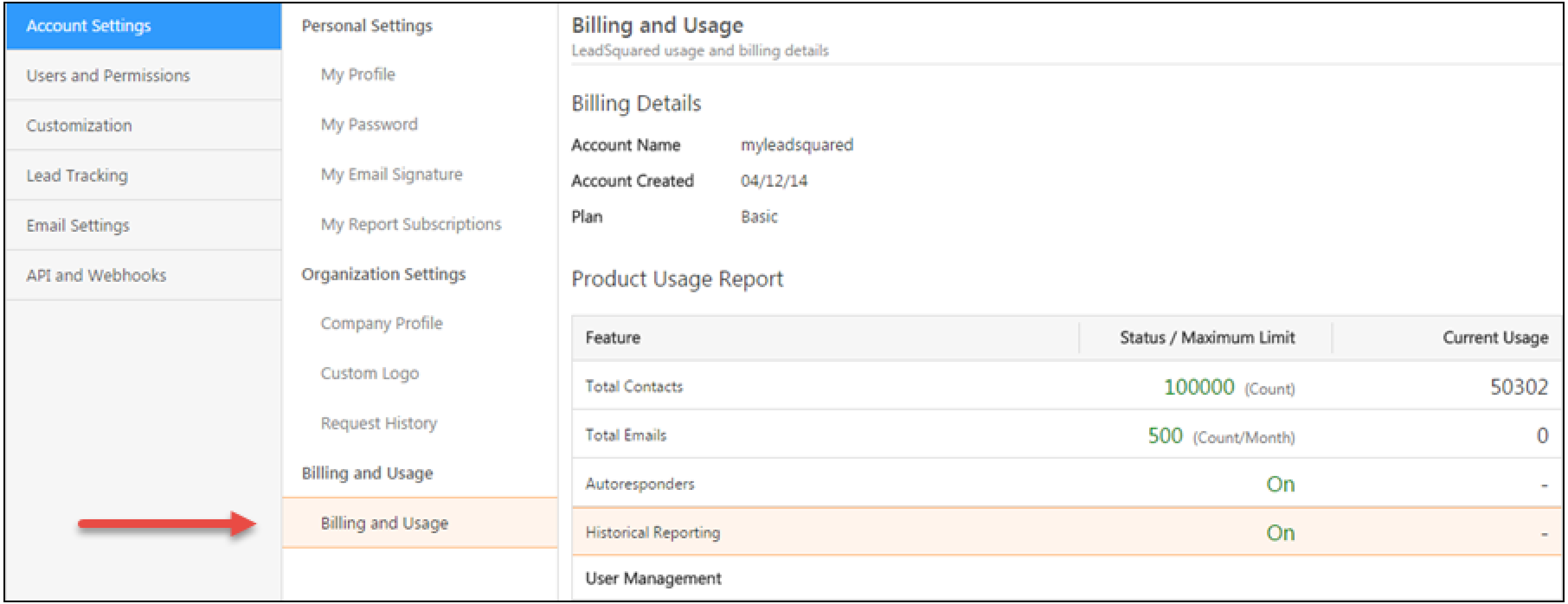
Navigate to My Account->Settings->Account Settings->Organization Settings->Custom Logo to update basic data about your organization



Check your subscription plan

Your subscription plan defines the usage limits of your LeadSquared account. Contact sales@leadsquared.com if you have questions about it.

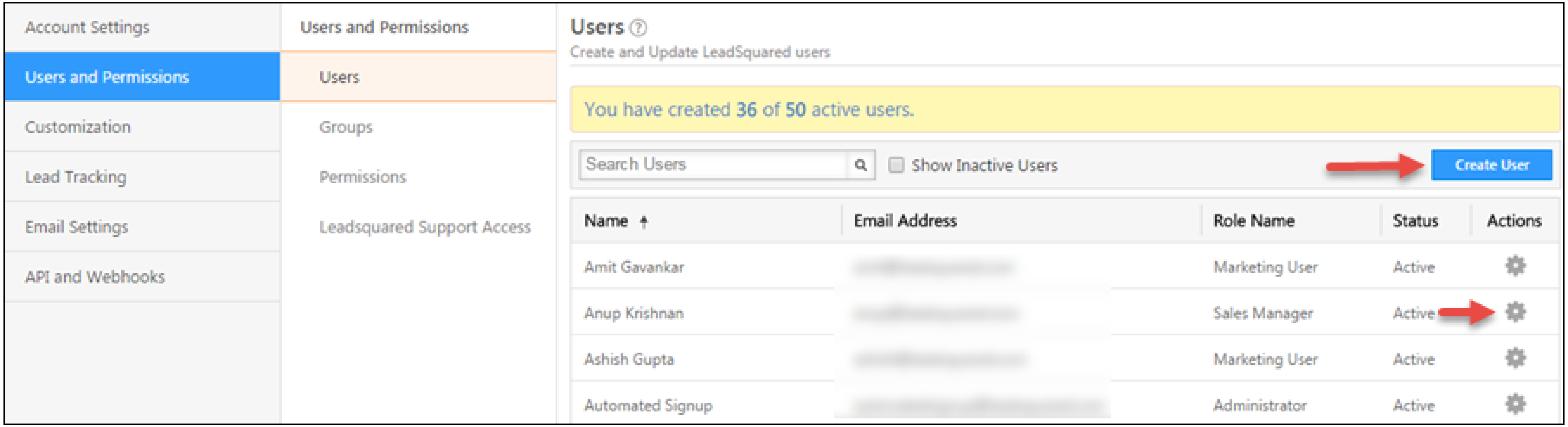
Navigate to My Account->Settings->Account Settings->Billing and Usage



Manager Users

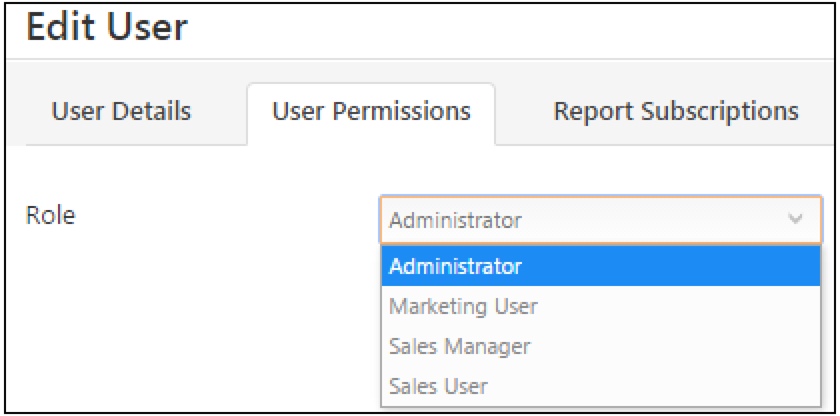
You can Add/Update/Delete users, assign them roles and permissions

Navigate to My Account-> Settings ->Users and Permissions->Users



Assign Users Roles

While Creating or Updating User you can assign an access role.



Role	Description
Administrator	Has access to everything
Marketing User	Can access all features and data except few settings like creating users
Sales Manager	Cannot access Marketing Features. Can access all Lead data.
Sales User	Cannot access Marketing Features. Can access Lead data where she is the lead owner..

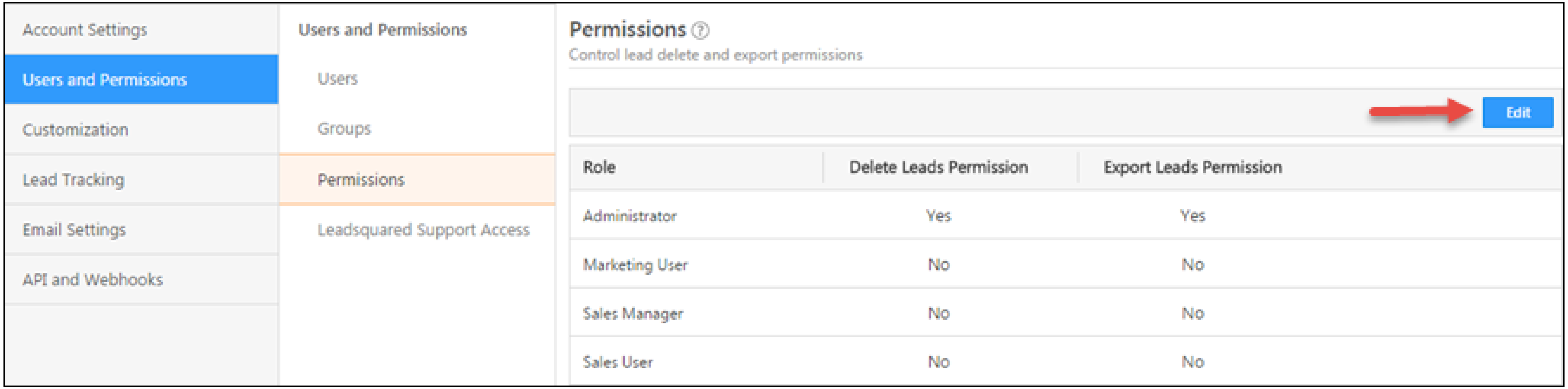
Relevant Help Pages

[LeadSquared User Roles and Access Rights]()

Manage Delete and Export Permissions

You can assign or revoke lead delete and export permissions from each user role

Navigate to My Account-> Settings ->Users and Permissions-> Permissions



Install Website Tracking Script

It will help you track which of your leads are visiting which pages on your website

Navigate to My Account-> Settings -> Lead Tracking-> 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

Website Tracking Script

http (Tracking on non secured site)

```
<!--LeadSquared Tracking Code Start-->
<script type="text/javascript" src="http://web.mxradon.com/t/Tracker.js"></script>
<script type="text/javascript">
      pidTracker('3818');
</script>
<!--LeadSquared Tracking Code End-->
```

- ✓ Put the tracking script on all pages of your website
- ✓ For word-press websites there is a plugin available
- ✓ If you have https website then choose corresponding script
- ✓ If you subscription plan supports multiple domains then put the script on all domains

Relevant Help Pages

How to deploy Visitor Tracking Script on your website?

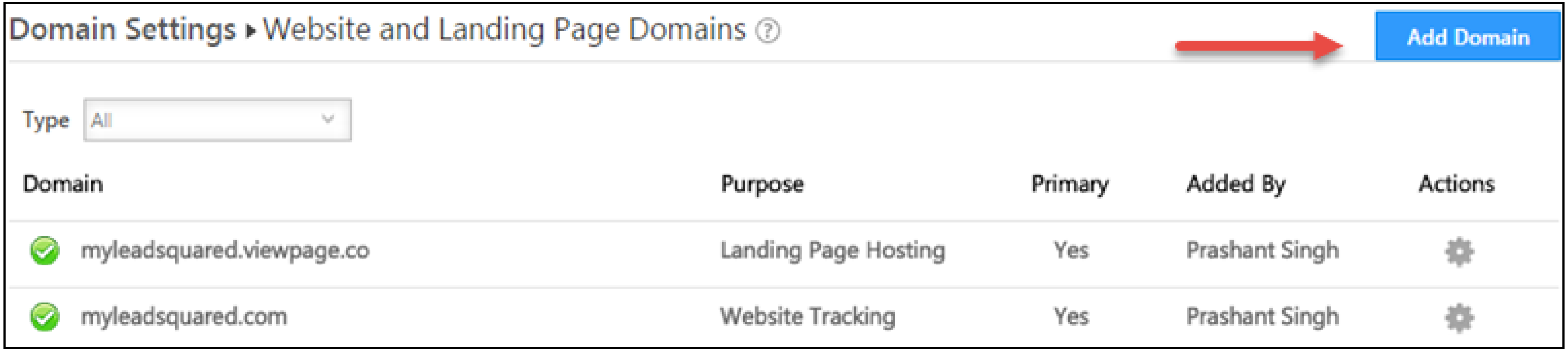
Configuring multiple domains in LeadSquared

Connect your website and landing page domains

LeadSquared can be connected to multiple website and landing page sub-domains (depending upon on subscription plan). You can track website visits on multiple domains (and sub-domains in each domain) in LeadSquared. You can also associate multiple sub-domains for your landing pages.

Navigate to My Account->Settings->Lead Tracking -> Website and Landing Page Domains.

You will find options to Add more domains and sub-domains



Relevant Help Pages

Configuring multiple domains in LeadSquared

DNS Settings for Landing Pages

Your landing pages are hosted by LeadSquared. The default hosting domain is http://<youraccountname>.viewpage.co.

You can change it to host landing pages in your own domain.

Create a cName record in your DNS and point to **cloud.viewpage.co .** For example if your 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->Lead Tracking->Website and Landing Page Domains and specify the sub-domain there.

Domain	Purpose	Primary	Added By	Actions
myleadsquared.viewpage.co	Landing Page Hosting	Yes	Prashant Singh	
mydomain1.com	Website Tracking		Prashant Singh	
page.mydomain1.com	Landing Page Hosting		Prashant Singh	
myleadsquared.com	Website Tracking	Yes	Prashant Singh	

complete CNAME setting to activate the sub-domain

Delete Domain
Set as Primary

Relevant Help Pages

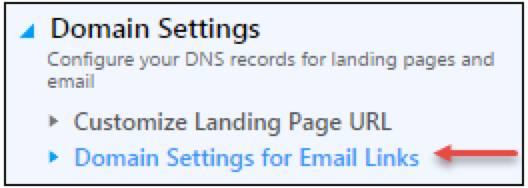
How to Publish Landing Pages within your Domain Name?

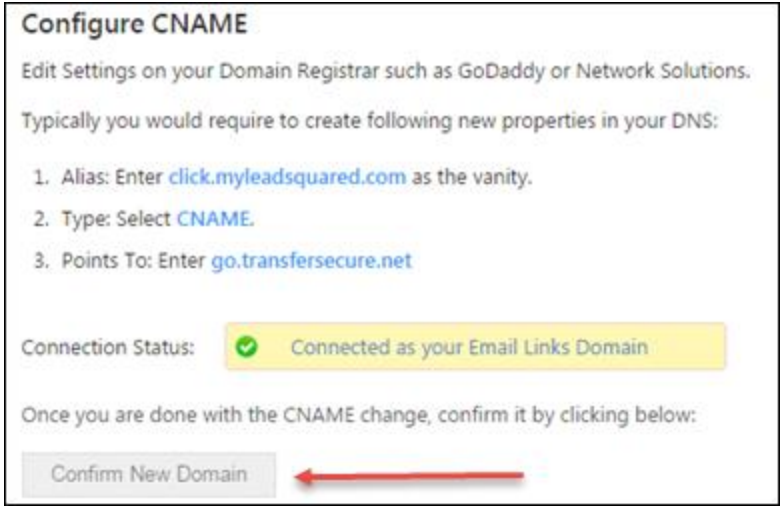
DNS Settings for Emails

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

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

After creating cName record, Login to LeadSquared and go to
My Account -> Settings -> Lead Tracking-> Email Link Domain
and click the “Confirm New Domain” button.





Relevant Help Pages
Domain Settings for Email Links

Install LeadSquared for Mobile

LeadSquared Mobile App is available for Android and iOS. Install it by clicking the respective app stores icons.

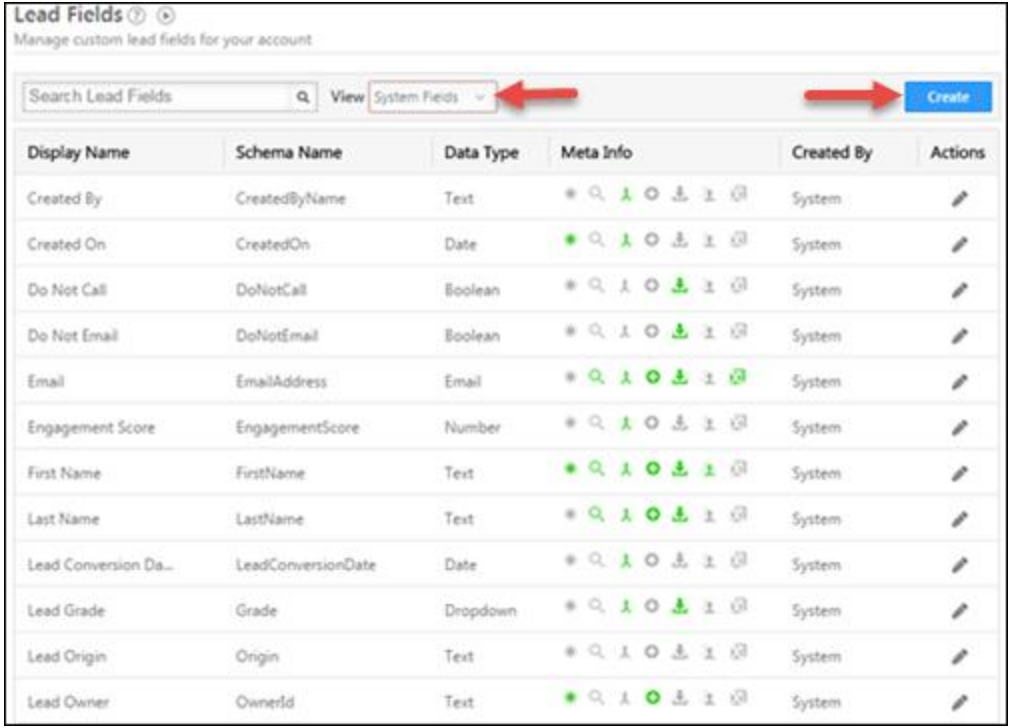
ANDROID APP ON Google play

Available on the App Store

2- Customize LeadSquared

Customize Lead Fields

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



- ✓ To create/update/delete Custom Fields, navigate to My Account-> Settings -> Customizations -> Lead Fields.
- ✓ You will find a number of fields pre-created.
- ✓ You can Add New Fields, Edit existing ones and delete some of the fields.
- ✓ Text, Number, Dropdown, Checkbox, Date, Time, Phone, Website and Email type of fields can be created
- ✓ You can make fields as mandatory and put duplicity constraints on them.

Relevant Help Pages
How to create custom fields in LeadSquared?

Customize Lead Stages

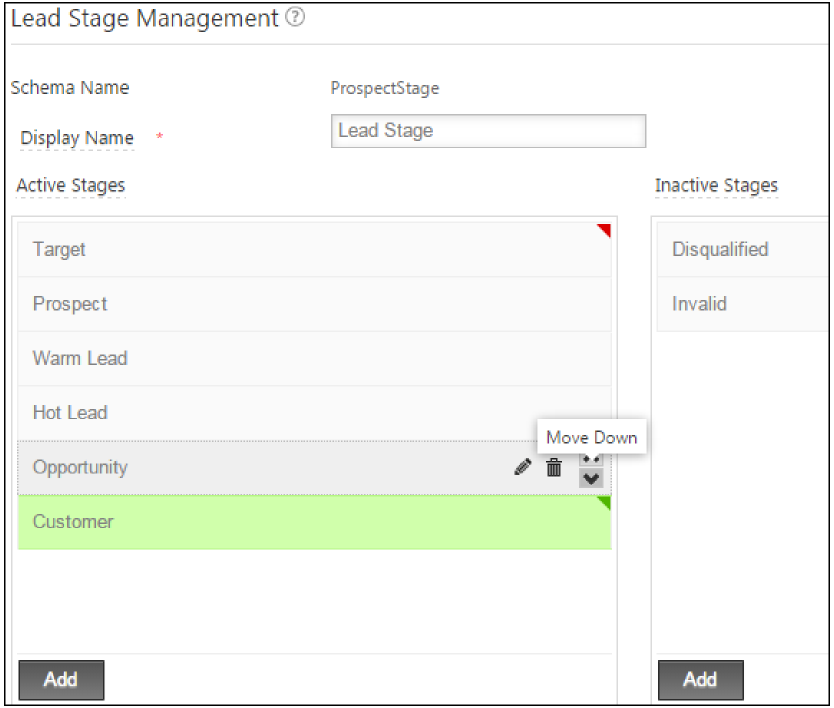
Lead Stage represents the position of the lead in your marketing funnel. You can map your lead stages with LeadSquared by customizing the “Lead Stage” property.

To customize Lead Stage, navigate to

My Account-> Settings -> Customization -> Lead Stages

and update the “Active” and “Inactive” stages

- ✓ Choose one of the stages as default in Active Stages
- ✓ Last stage of Active Stages should mean a “Customer”
- ✓ Inactive Stages represent leads that are dormant.
- ✓ The sequence of active lead stages will be shown in Lead Funnel Report



Relevant Help Pages
Configure Lead Stages

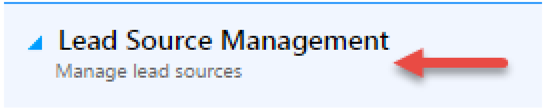
Add Custom Lead Sources

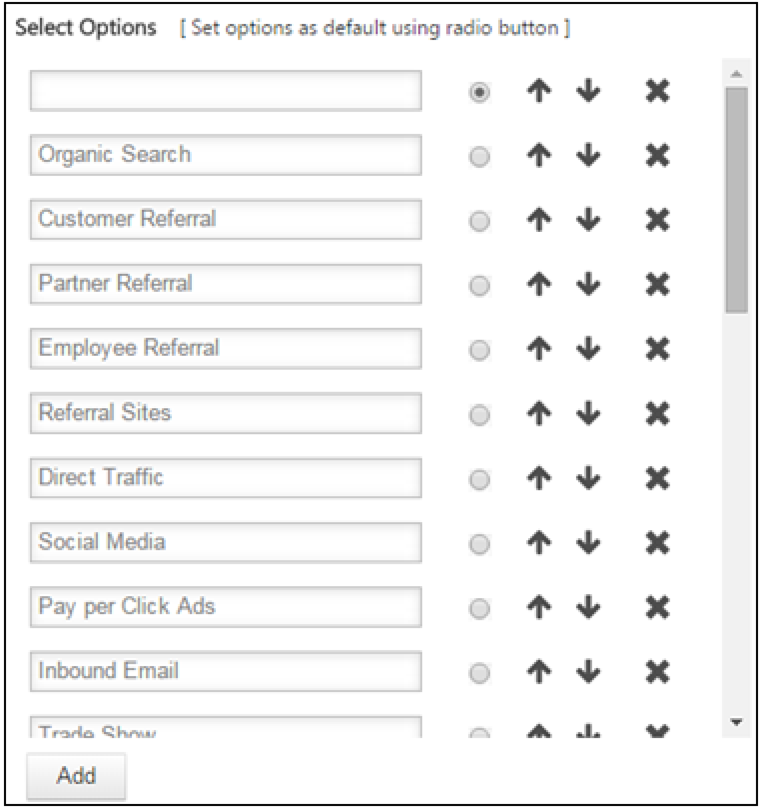
Lead Source usually means the channel through which Lead had first interaction with your business. It can be online ad, telephone, TV ad, referral tec.

- ✓ The Lead Source setting can be customized at:

My Account-> Settings ->Customization -> Lead Sources

- ✓ You can add your custom Lead Sources

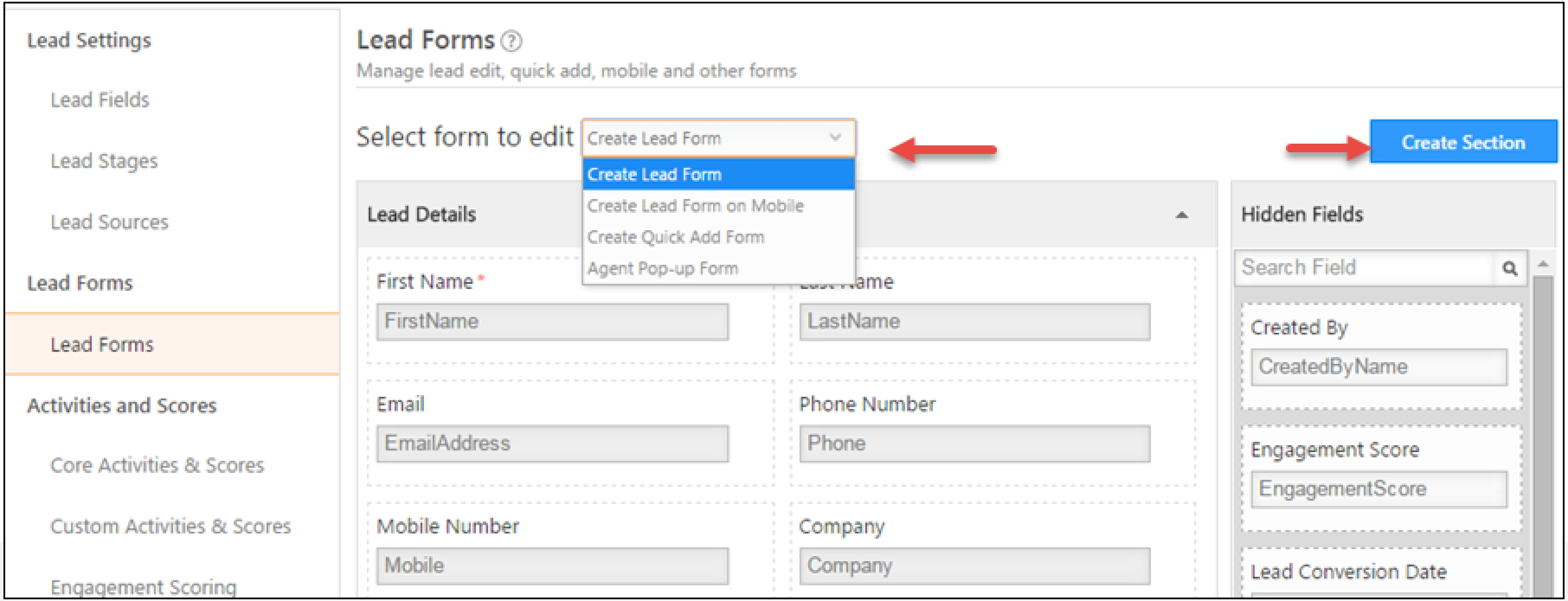




Customize Lead Forms

You can manually add leads in Lead Squared using Lead Addition Forms like “Quick Add Lead”, “Add New Lead” and lead capture form on Mobile. These forms are fully customizable. You choose form fields, their order and display names

. Customize your Lead forms at: My Account -> Settings -> Customization-> Lead Forms. You can create new sections, move fields within and across sections, hide field by moving them to hidden section.



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 scores to activities based on their relative importance.

Online activities like Email Open/Click, Website visit etc., are tracked by LeadSquared automatically. The score for them can be customized at: My Account-> Settings -> Customization -> Core Activities and Scores

Lead Settings

- Lead Fields
- Lead Stages
- Lead Sources

Lead Forms

- Lead Forms

Activities and Scores

- Core Activities & Scores

Core Activities & Scores

Manage lead scores of core web and email activities

Edit

Activity	Display Name	Score	Tags
Email - Bounced	Email Bounced	-100	Email
Email - Link Clicked	Email Link Clicked	2	Email
Email - Mailing Preference Link Clicked	Mailing preference link clicked	0	Email, EmailClient
Email - Marked Spam	Email Marked Spam	-500	Email

Relevant Help Pages

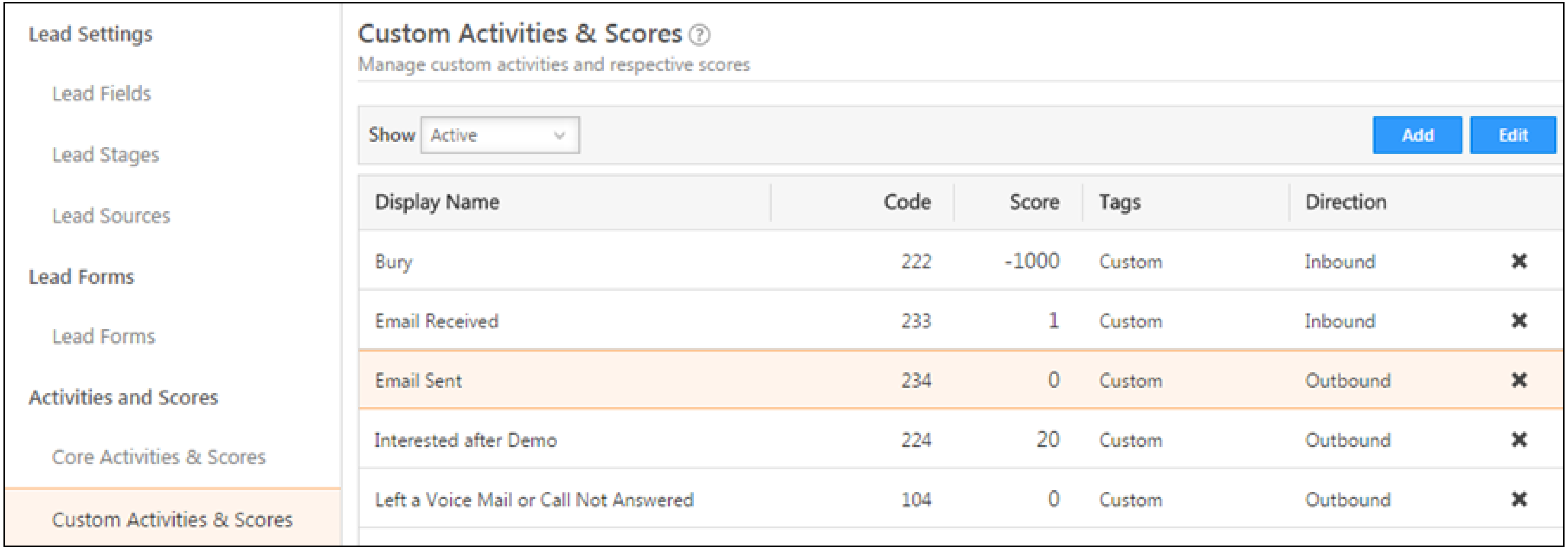
How does Lead Scoring work?

Lead Scoring: Strategies and Benefits

Setup Custom Lead Activities

You can create your own Lead Activities that sales or inside sales people can associate with the leads.

To create/update/delete Custom Activities, navigate to My Account-> Settings ->Customization-> Custom Activities and Scores



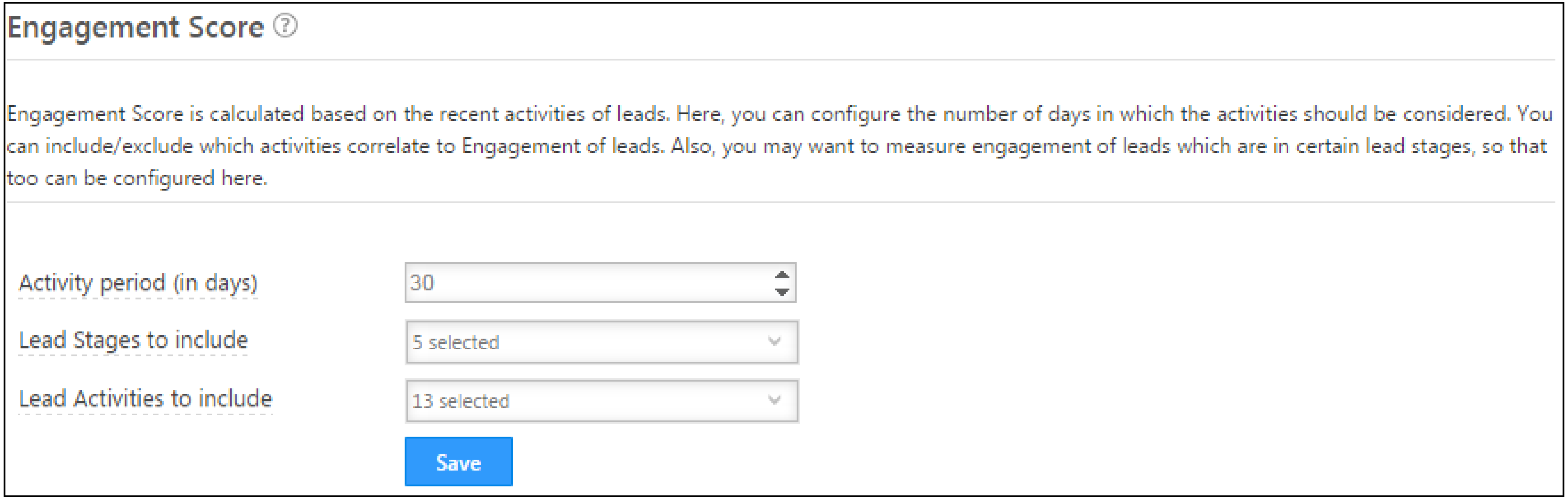
Display Name	Code	Score	Tags	Direction	
Bury	222	-1000	Custom	Inbound	✖
Email Received	233	1	Custom	Inbound	✖
Email Sent	234	0	Custom	Outbound	✖
Interested after Demo	224	20	Custom	Outbound	✖
Left a Voice Mail or Call Not Answered	104	0	Custom	Outbound	✖

Relevant Help Pages
How to add Custom Lead Activity and associate a Score to it?

Setup Engagement Scoring

Engagement Score is a 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 -> Customization -> Engagement Scoring]() . Choose the Activity Period, Lead Stages and Lead Activities that define lead engagement.



Relevant Help Pages

[Setup Criteria of Lead Engagement Scoring]()

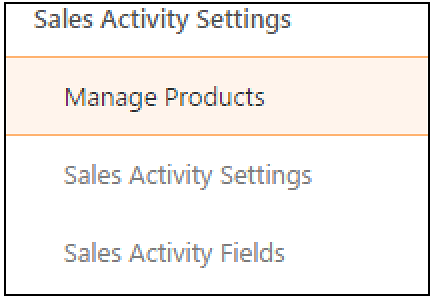
[Help Video: How to Setup Lead Engagement Scoring and Tracking]()

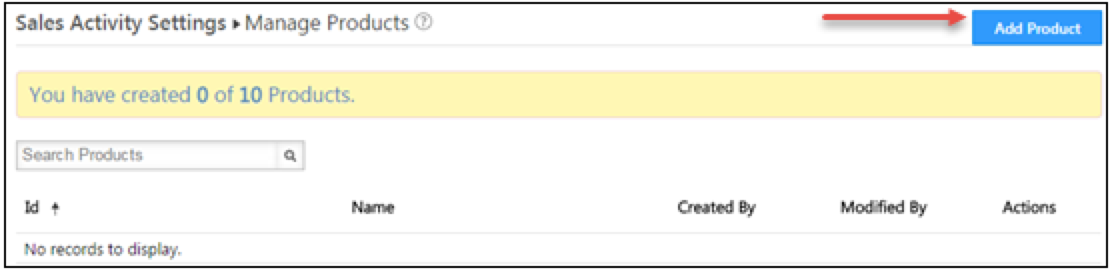
Setup Revenue Activities

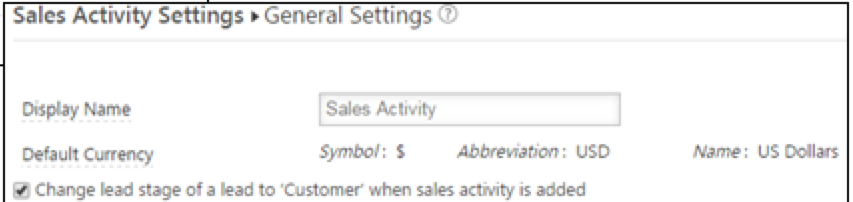
When a lead signs up for your product or service offering, you can capture Revenue associated with it. Examples:

Capture Admission when student pays fee , Capture a subscription when a new customer signs up, Capture a new hotel room booking etc.

To setup your Revenue Activity, navigate to [My Account-> Settings -> Customization -> Sales Activity Settings]() and update Manage Products, Sales Activity Settings and Sales Activity Fields.





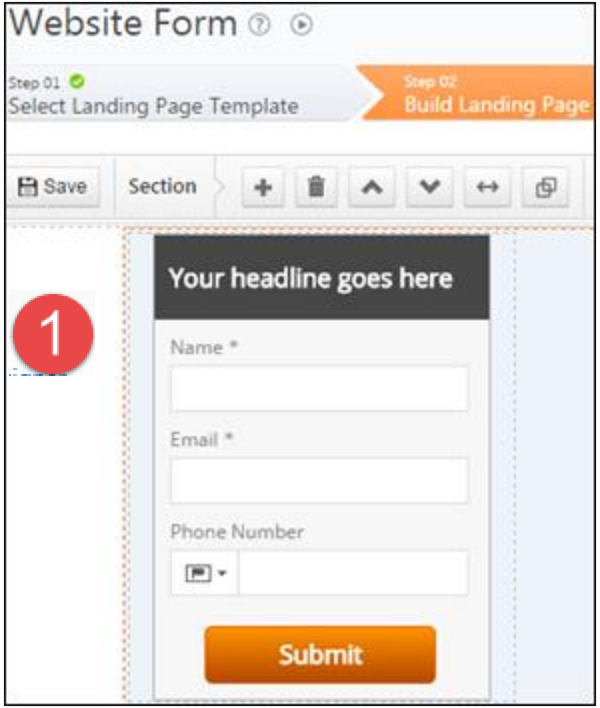


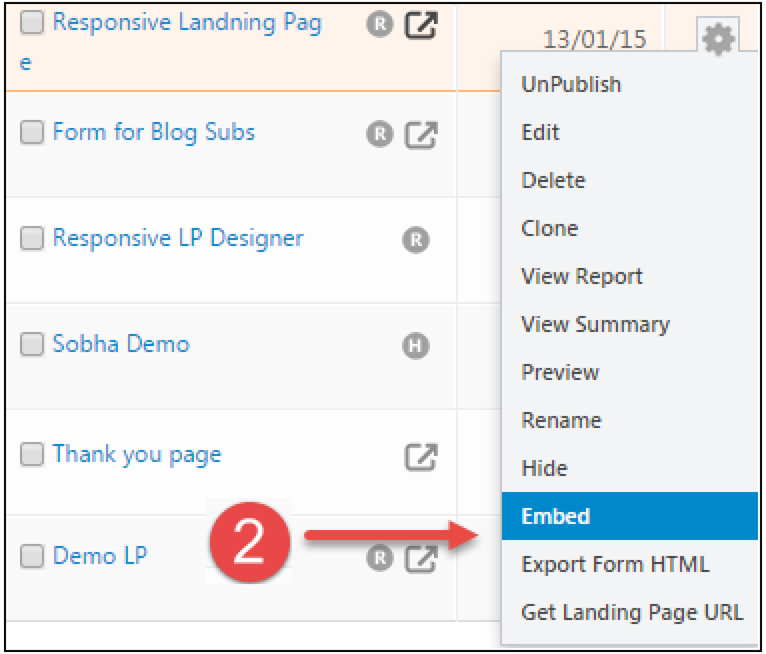
Relevant Help Pages
[Sales Activity Management]()

3-Connect LeadSquared with your business

Capture Leads from your websites in LeadSquared using Forms

For most businesses, the website is the center of marketing. Leads from all forms of your website can be captured in using LeadSquared's web forms. You just need to create similar forms in LeadSquared get their HTML code and replace for your form with it.





1. Create the form in LeadSquared
2. Get Embed code (iFrame) or Form HTML
3. Paste this code in place of your form in your website pages

Relevant Help Pages
[Embedding Form in Website]

Capture Leads from your websites/apps using LeadSquared API

LeadSquared provides HTTP REST APIs that accept JSON data. Leads can be created/updated in LeadSquared by any website or app using these APIs

- ✓ [Get your API access key]
- ✓ [Find the Right API]
- ✓ Create JSON of captured data and POST to the API.
- ✓ Check [LeadSquared API overview] to know more
- ✓ Here is [Sample Code]

Connect your online ads with LeadSquared

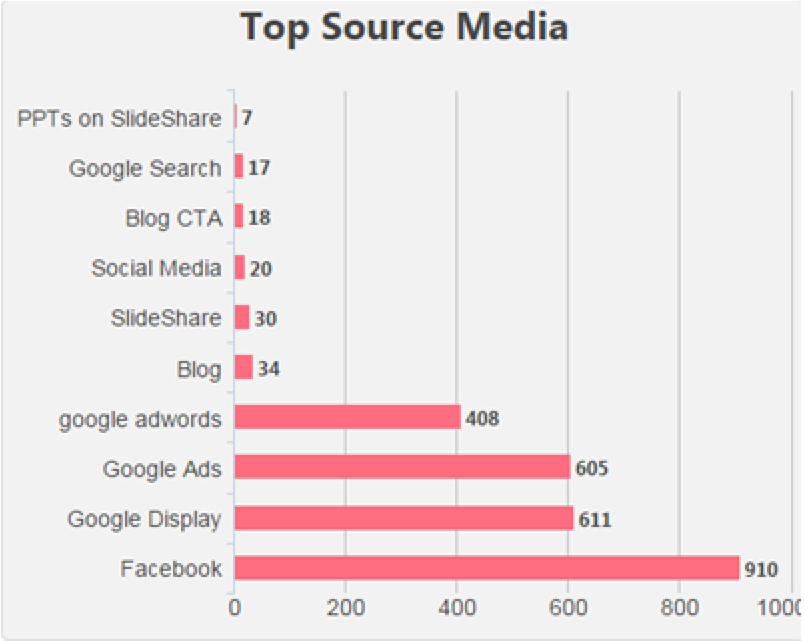
Use LeadSquared Landing Pages to capture Leads from your Search, Banner and Social ads

1. Create Landing Pages in LeadSquared
2. Get URL of page in your domain
3. Add additional UTM parameters (optional)
4. Use it as destination URL in ads

Google AdWords

doubleclick by Google

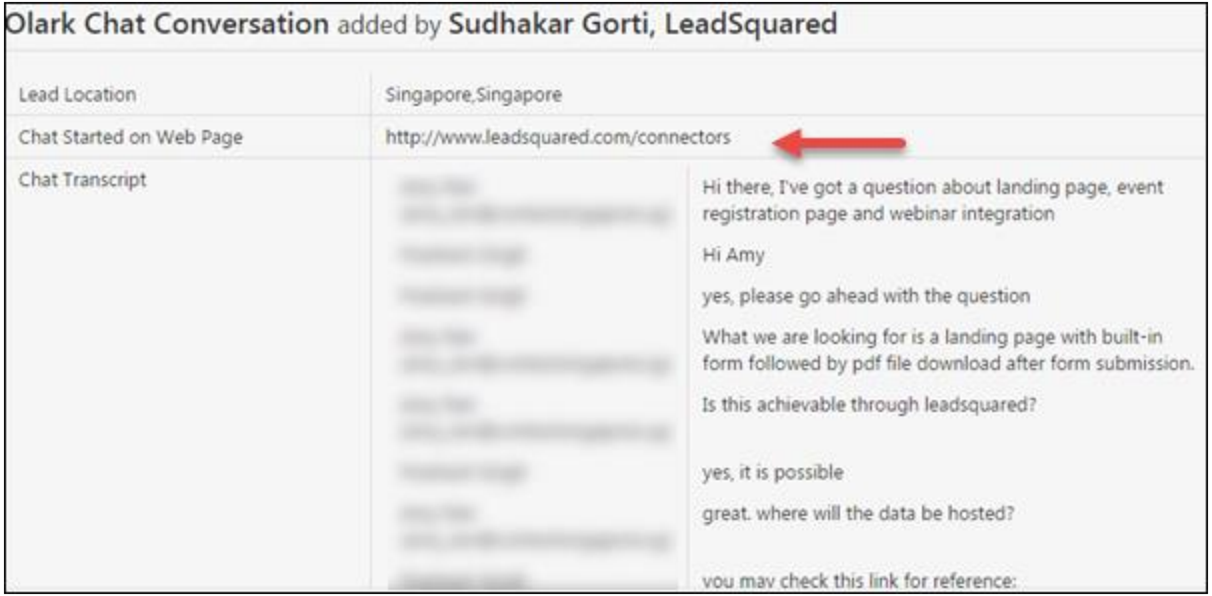
Facebook Ads



You can capture all leads from all ads and analyze your campaign performance

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.



Click on the chat tool images to find the help articles. Using the chat connector you can capture lead data as well as chat transcript.

Capture your inbound phone calls as Leads

We support leading cloud telephony system to help you capture inbound calls as Leads.

Navigate to APPS -> Apps Marketplace, choose the telephony connector relevant to you and install it.

- ✓ Capture Inbound Caller phone number and covert to Lead
- ✓ Make outbound calls using Click to Call
- ✓ Enable Inbound Call Popup on Agent's screen
- ✓ Review Call Recordings

- ✓ ***Features may differ from provider to provider***
- ✓ ***Additional Charge may apply to use the telephony connectors. Contact sales@leadsquared.com***

Supported Telephony Providers

Super Receptionist

AMEYO

CallRail

ozonetel A cloud communications company

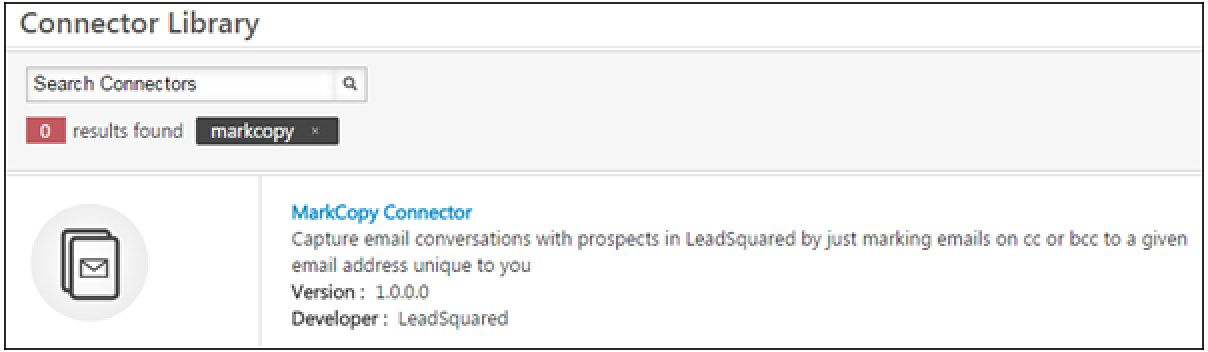
Relevant Help Pages

Telephony & SMS 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**".

Navigate to [My Account Settings -> Connectors and Webhooks-> Connectors]() and Click Add Connector and Select "MarkCopy Connector"



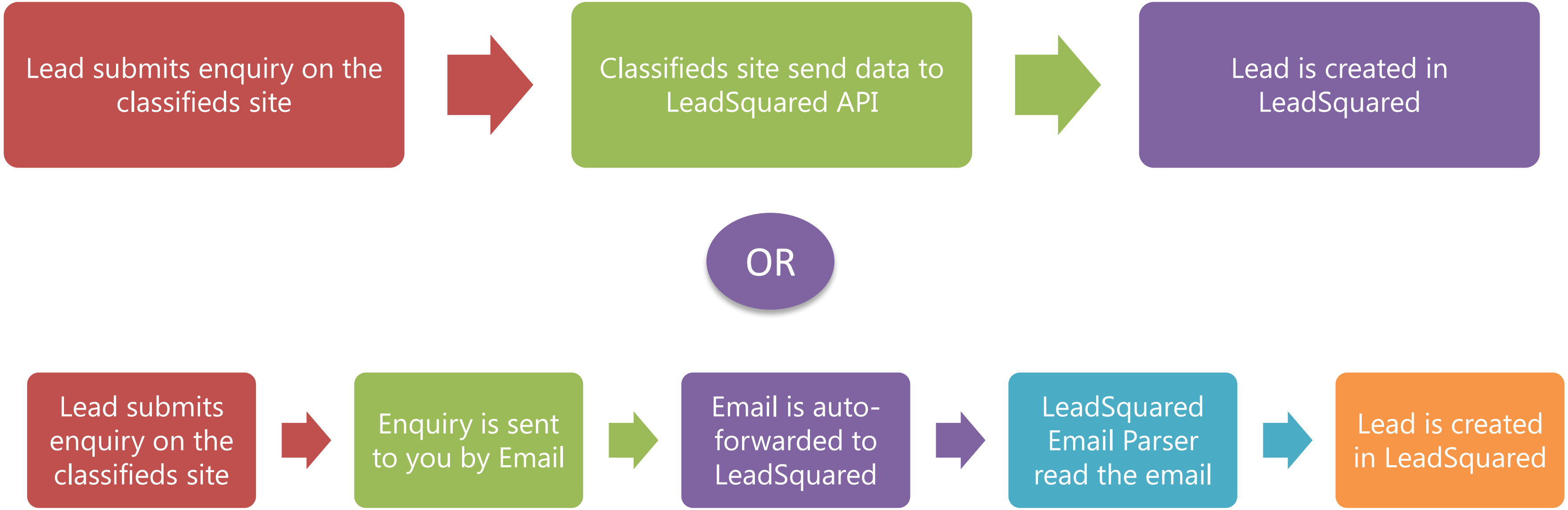
- ✓ Get your organization's @markcopy.com email id after configuring the connector
- ✓ Copy (CC or BCC) to it while sending email from your email client to captured recipients as Leads
- ✓ Auto forward inbound emails to capture Sender as lead
- ✓ Email message is captured in lead activity

Relevant Help Pages

[Capture Email Sender and Recipients as Leads using Markcopy Connector]()

Capture Leads from Classifieds

You can capture Leads from Classified portals like **local search websites, auto portals, education portals, property listing sites**

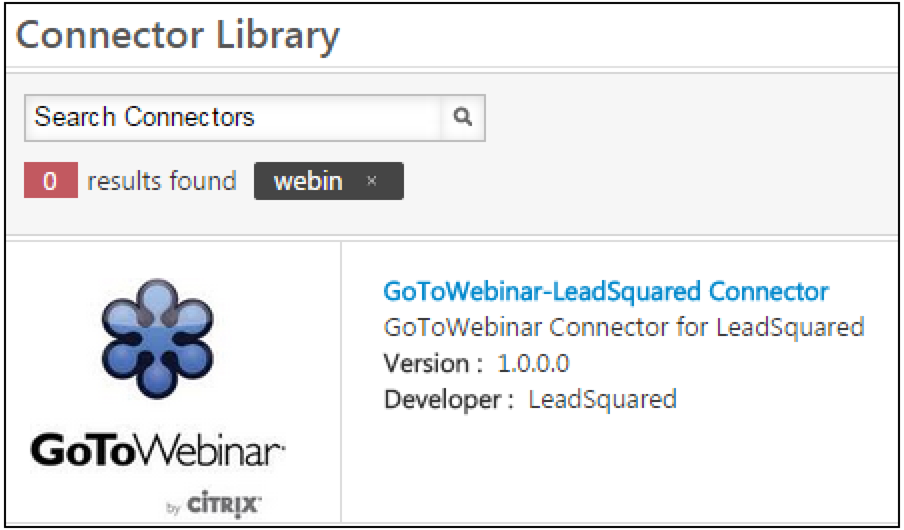


✓ ***Additional charges may apply if Email based parsing is used. Please contact sales@leadsquard.com for more information.***

Capture Leads from Gotowebinar

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

Navigate to [My Account Settings -> Connectors and Webhooks-> Connectors](#)and Click Add Connector and select “GoToWebinar Connector”



- ✓ Add registrations to GoToWebinar from LeadSquared Landing Pages
- ✓ After webinar, sync attendee data with LeadSquared
- ✓ Do lead scoring based on webinar registration/attendance

Check steps to configure the connectors at [LeadSquared GoToWebinar Connector](#)

4- Configure Apps

SMS Marketing App

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

Navigate to [APPS -> Apps Marketplace], select SMS Marketing App and install it. Go to [APPS -> Installed Apps] and configure the app. Steps to configure can be found at [Configuring LeadSquared SMS Marketing Connector]

- ✓ Send SMS to leads and lists
- ✓ Send Autoresponder SMS
- ✓ Send SMS on Lead Activity
- ✓ Merge Lead Fields with SMS message
- ✓ Create SMS templates for self or entire

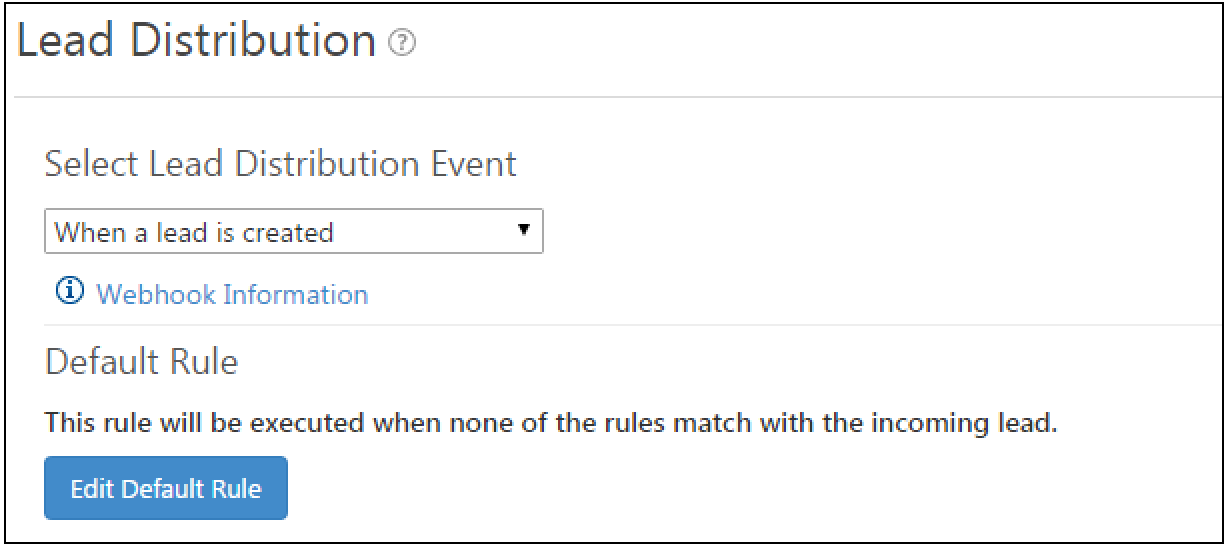
Relevant Help Pages

[Sending and Autoresponder SMS to leads submitting on Landing Pages]
[Sending a message to individual leads]
[Sending message to List of Leads]

Lead Distribution Automation App

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

Navigate to [APPS -> Apps Marketplace](#) and install the "Lead Distribution Automation" app. Then navigate to **APPS -> Lead Distribution** and configure the app.



- ✓ 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)

To configure and use Lead Distribution Automation app, check [**Lead Distribution Automation in LeadSquared.**](#)

5- Test & Train

Test Your LeadSquared account

Test all settings and features of your LeadSquared account

- ✓ Create Lead using Quick Add Lead and Add New Lead forms
- ✓ Import Lead data
- ✓ Send Email to Lead
- ✓ Send Email Campaigns
- ✓ Create Landing Pages and do test submissions
- ✓ Create Autoresponders
- ✓ Add Activity, Tasks and Notes to Leads
- ✓ Send SMS

- ✓ Create static list
- ✓ Create Dynamic Lists
- ✓ Create Quick Filters
- ✓ Use Advanced Search
- ✓ Create and publish Topbars
- ✓ Test MarkCopy connector
- ✓ Test Lead Distribution Rules
- ✓ Create your custom dashboard

- ✓ **Check this slideshow to understand how to use LeadSquared: "Getting Started Guide for Marketing Users"**

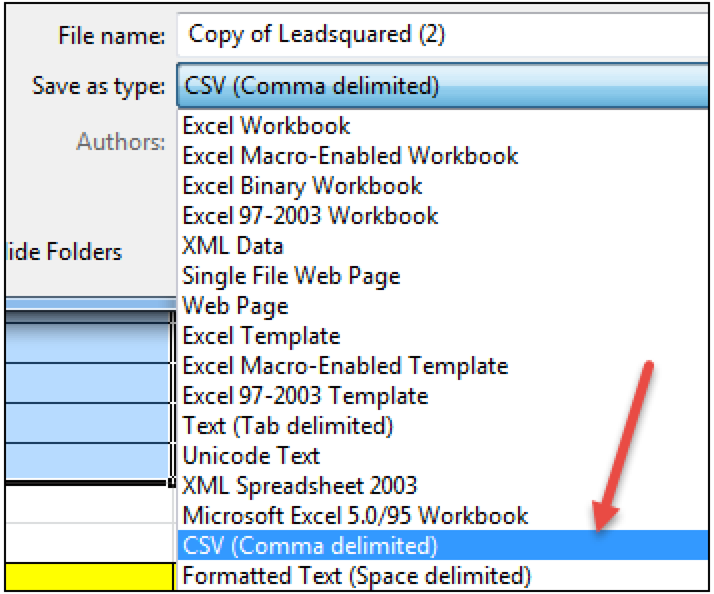
6- Migrate Data

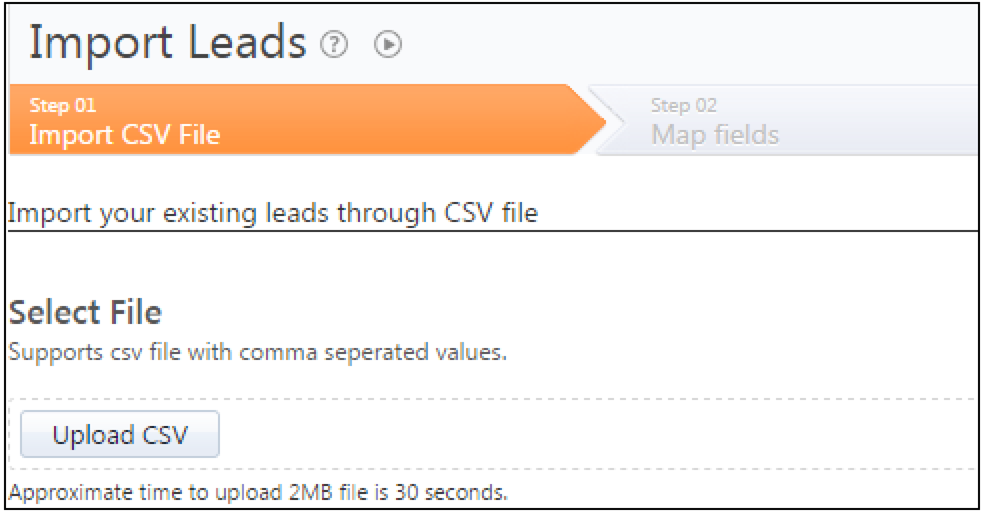
Import Data in LeadSquared

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?

7-Go Live

Find all the help you need at
http://help.leadsquared.com (bookmark it)

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

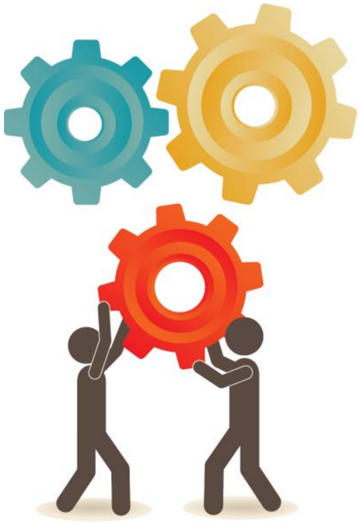
Web Ticket Support: http://support.leadsquared.com/support/tickets/new

Email support: support@leadsquared.com

Chat support: Use inbuilt chat window in LeadSquared

Want to learn more about marketing and sales?
http://blog.leadsquared.com

Land More Leads, Close More Deals



Complete lead to revenue platform