

Get Started with LeadSquared

Guide for Admin Users



Complete lead to revenue platform

Bookmark LeadSquared Login Page

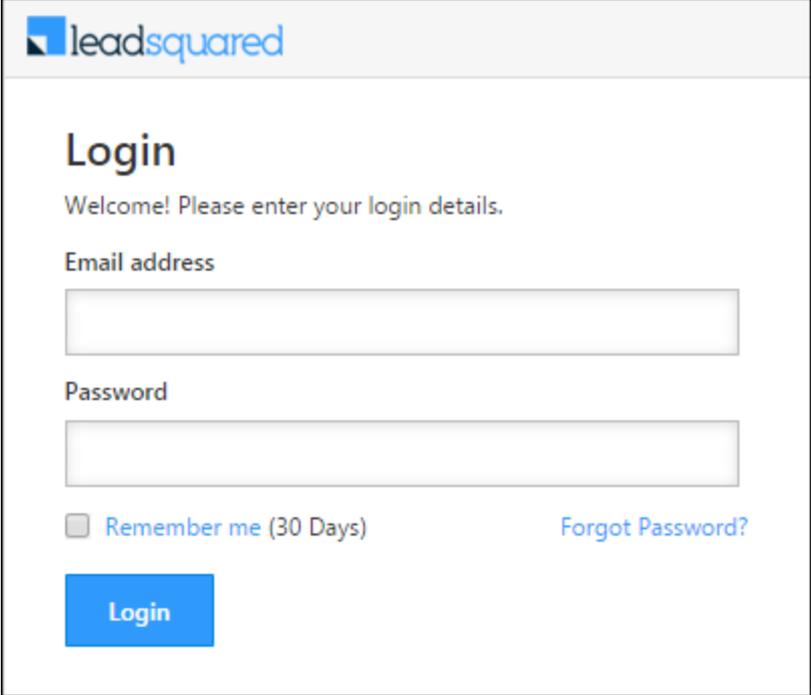
Login to LeadSquared at

<https://run.leadSquared.com>

(Bookmark the URL)

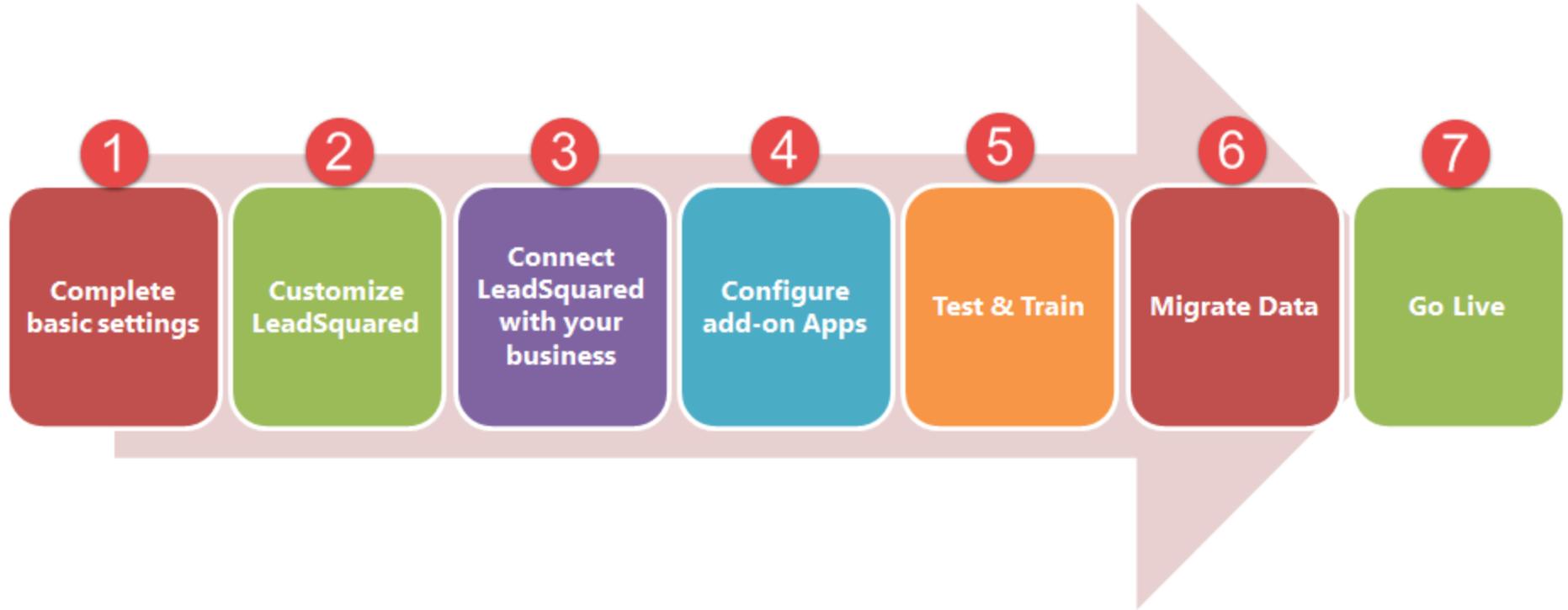
LeadSquared provides best experience in:

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



The screenshot shows the LeadSquared login page. At the top left is the LeadSquared logo, which consists of a blue square with a white diagonal line and the text "leadSquared" in a blue sans-serif font. Below the logo is the heading "Login" in a bold, dark blue font. Underneath the heading is a welcome message: "Welcome! Please enter your login details." in a smaller, grey font. The form contains two input fields: "Email address" and "Password", both with light grey borders and no text inside. Below the "Password" field is a checkbox with the label "Remember me (30 Days)" in blue text. To the right of the checkbox is a link "Forgot Password?" in blue text. At the bottom of the form is a blue button with the word "Login" in white text.

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.

Settings ?

Account Settings	Personal Settings	My Profile ? Manage your personal profile	
Users and Permissions	My Profile	Role	Administrator
Customization	My Password	First Name	Prashant
Lead Tracking	My Email Signature	Middle Name	
Email Settings	My Report Subscriptions	Last Name	Singh, LeadSquared
API and Webhooks	Organization Settings	Email Address	prashant@leadsquared.com
	Company Profile	Associated Phone Numbers	+91-9901662111
	Custom Logo	Show Incoming Call Popup	Disabled

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.

Settings ?

Account Settings	Personal Settings	<h3>My Email Signature ?</h3> <p>Update your HTML and text email signatures</p> <hr/> HTML Signature <div><p>Warm Regards, Prashant Singh <i>Chief Customer Officer</i> LeadSquared</p></div>
Users and Permissions	My Profile	
Customization	My Password	
Lead Tracking	My Email Signature	
Email Settings	My Report Subscriptions	
API and Webhooks	Organization Settings	

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.

Personal Settings	My Report Subscriptions ⓘ Manage your report subscriptions
My Profile	<input checked="" type="checkbox"/> Daily User Tasks Report User Tasks Report summarizing the pending tasks for today.
My Password	<input checked="" type="checkbox"/> Daily Report  Select Columns Lead Activity Report summarizing the new leads and most active leads in the past day.
My Email Signature	<input checked="" type="checkbox"/> Weekly Report Weekly summary of the marketing effort and results across the organization.
My Report Subscriptions	<input checked="" type="checkbox"/> Daily Report For Owner Select Columns Lead Activity Report summarizing the new leads and most active leads in the past day, where the user
Organization Settings	<input checked="" type="checkbox"/> Monthly Status Report Monthly summary of the marketing effort and results across the organization.
Company Profile	<input type="button" value="Save"/>
Custom Logo	
Request History	

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

Account Settings	Personal Settings	Company Profile <small>?</small>	Edit
Users and Permissions	My Profile	Update your organization profile	
Customization	My Password	Company Name LeadSquared, Inc.	
Lead Tracking	My Email Signature	Date Format dd/mm/yyyy	
Email Settings	My Report Subscriptions	Phone No. Format +CountryCode-123-456-7890	
API and Webhooks	Organization Settings	Default Country Code India (+91)	
	Company Profile	Default Currency <i>Symbol:</i> Rs. <i>Abbreviation:</i> INR <i>Name:</i> Indian Rupees	
	Custom Logo	Time Zone (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi	
	Request History	Website www.leadSquared.com	
	Billing and Usage	Street1 555, US Highway One South	
	Billing and Usage	Street2 Suite 170	
		City Iselin	
		State NJ	
		Country United States	
		Zip 08830	

Upload your own logo to personalize LeadSquared

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

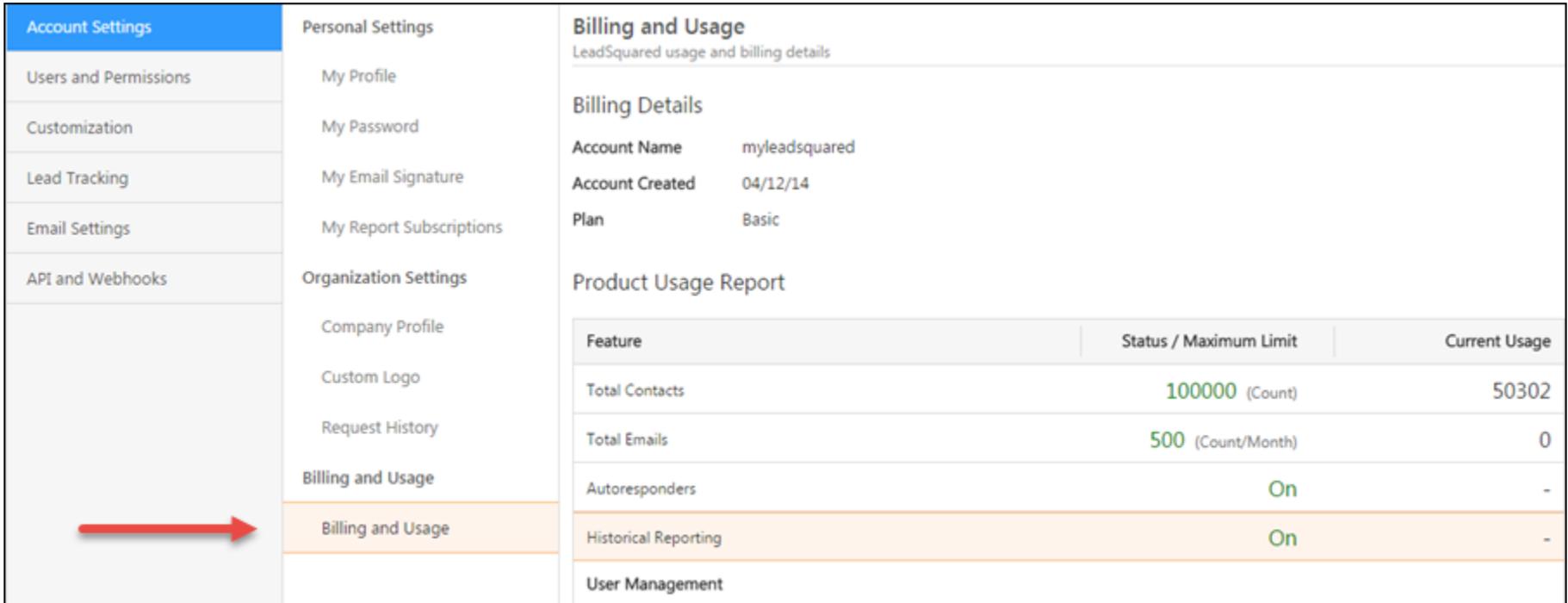
Navigate to [My Account->Settings->Account Settings->Organization Settings->Custom Logo](#) to update basic data about your organization

Account Settings	Personal Settings	Custom Logo <small>?</small> Upload your company's logo for personalization
Users and Permissions	My Profile	
Customization	My Password	
Lead Tracking	My Email Signature	
Email Settings	My Report Subscriptions	<input type="button" value="Update Logo"/> <input type="button" value="Revert to default"/>
API and Webhooks	Organization Settings	
	Company Profile	
	Custom Logo	

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](#)



The screenshot displays the LeadSquared account settings interface. On the left is a navigation sidebar with 'Account Settings' highlighted in blue. Below it are links for 'Users and Permissions', 'Customization', 'Lead Tracking', 'Email Settings', and 'API and Webhooks'. The main content area is divided into three columns. The first column contains 'Personal Settings' (My Profile, My Password, My Email Signature, My Report Subscriptions) and 'Organization Settings' (Company Profile, Custom Logo, Request History). The second column contains 'Billing and Usage', which is highlighted in orange and has a red arrow pointing to it. The third column shows 'Billing and Usage' details, including 'Billing Details' (Account Name: myleadsquared, Account Created: 04/12/14, Plan: Basic) and a 'Product Usage Report' table.

Feature	Status / Maximum Limit	Current Usage
Total Contacts	100000 (Count)	50302
Total Emails	500 (Count/Month)	0
Autoresponders	On	-
Historical Reporting	On	-

Manager Users

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

Navigate to [My Account-> Settings ->Users and Permissions->Users](#)

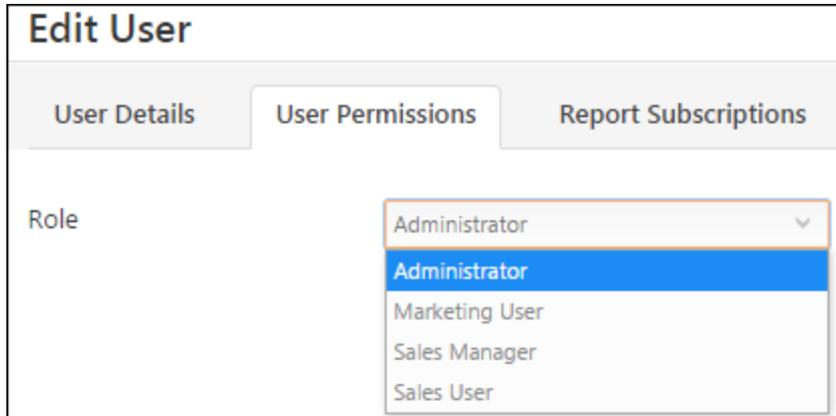
The screenshot displays the 'Users and Permissions' management interface. On the left, a sidebar menu includes 'Account Settings', 'Users and Permissions' (highlighted), 'Customization', 'Lead Tracking', 'Email Settings', and 'API and Webhooks'. The 'Users and Permissions' section is further divided into 'Users', 'Groups', 'Permissions', and 'Leadsquared Support Access'. The main content area is titled 'Users' and includes a sub-header 'Create and Update LeadSquared users'. A yellow notification banner states 'You have created 36 of 50 active users.' Below this is a search bar labeled 'Search Users' and a checkbox for 'Show Inactive Users'. A red arrow points to a blue 'Create User' button. A table lists the following users:

Name ↑	Email Address	Role Name	Status	Actions
Amit Gavankar	[Redacted]	Marketing User	Active	⚙️
Anup Krishnan	[Redacted]	Sales Manager	Active	⚙️
Ashish Gupta	[Redacted]	Marketing User	Active	⚙️
Automated Signup	[Redacted]	Administrator	Active	⚙️

A red arrow points to the 'Active' status of the 'Anup Krishnan' user, and another red arrow points to the 'Create User' button.

Assign Users Roles

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



The screenshot shows the 'Edit User' interface with three tabs: 'User Details', 'User Permissions', and 'Report Subscriptions'. The 'User Permissions' tab is active. Below the tabs, there is a 'Role' label and a dropdown menu. The dropdown menu is open, showing a list of roles: 'Administrator', 'Marketing User', 'Sales Manager', and 'Sales User'. The 'Administrator' role is currently selected and highlighted in blue.

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](#)

Account Settings	Users and Permissions	Permissions ⓘ Control lead delete and export permissions		
Users and Permissions	Users	<input type="text"/>  <input type="button" value="Edit"/>		
Customization	Groups	Role	Delete Leads Permission	Export Leads Permission
Lead Tracking	Permissions	Administrator	Yes	Yes
Email Settings	Leadsquared Support Access	Marketing User	No	No
API and Webhooks		Sales Manager	No	No
		Sales User	No	No

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) v  
  
<!--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

Domain Settings ▶ Website and Landing Page Domains ?  [Add Domain](#)

Type

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

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	 Delete Domain Set as Primary
 myleadsquared.com	Website Tracking	Yes	Prashant Singh	

complete CNAME setting to activate the sub-domain

Relevant Help Pages

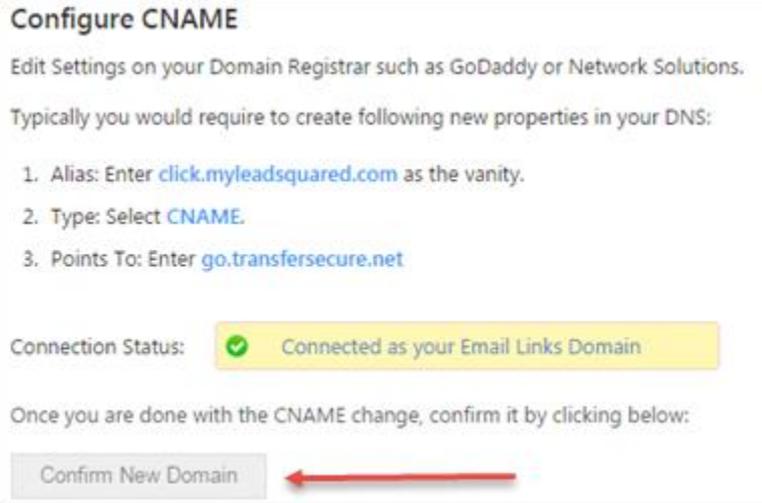
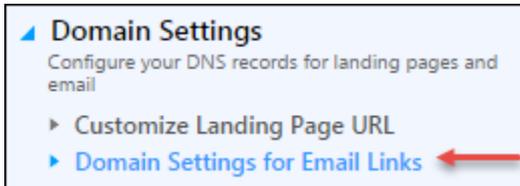
[How to Publish Landing Pages within your Domain Name?](#)

DNS Settings for Emails

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

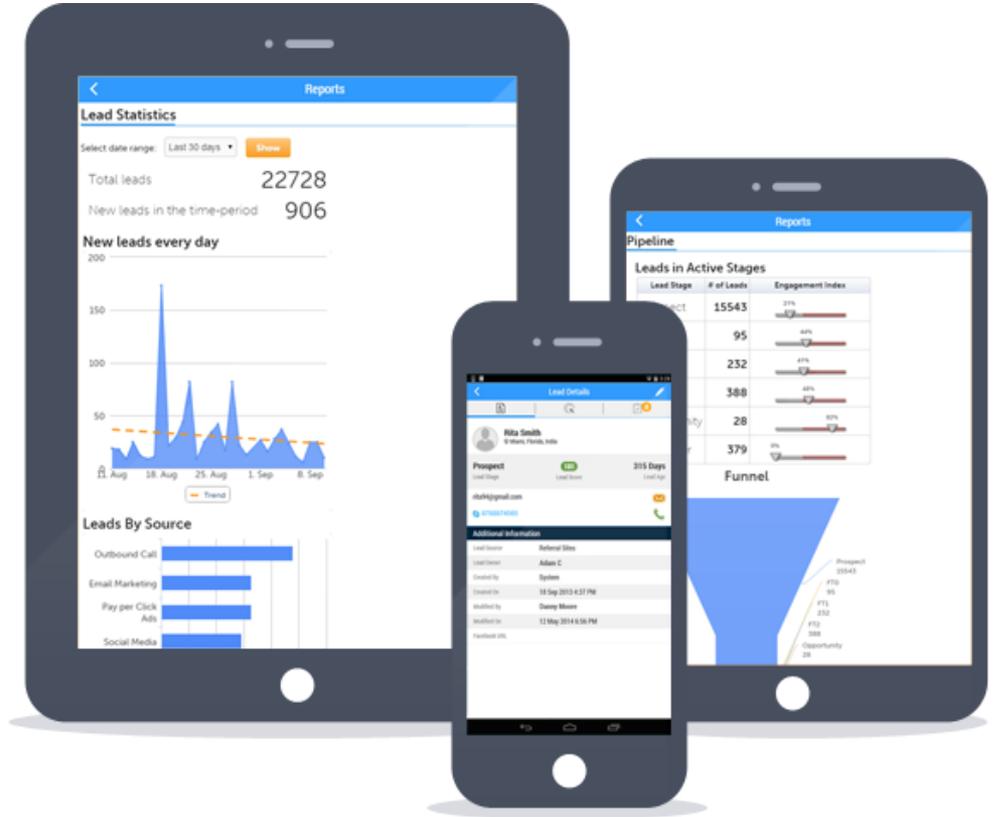
Create a cName record called "click" in your DNS and point to **go.transfersecure.net**. For example if your domain name is yourdomain.com then the setting will look like **click.yourdomain.com** points to **go.transfersecure.net**

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.



Install LeadSquared for Mobile

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



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.

Lead Fields  
Manage custom lead fields for your account

Search Lead Fields View **System Fields**  

Display Name	Schema Name	Data Type	Meta Info	Created By	Actions
Created By	CreatedByName	Text	     	System	
Created On	CreatedOn	Date	     	System	
Do Not Call	DoNotCall	Boolean	     	System	
Do Not Email	DoNotEmail	Boolean	     	System	
Email	EmailAddress	Email	     	System	
Engagement Score	EngagementScore	Number	     	System	
First Name	FirstName	Text	     	System	
Last Name	LastName	Text	     	System	
Lead Conversion Da...	LeadConversionDate	Date	     	System	
Lead Grade	Grade	Dropdown	     	System	
Lead Origin	Origin	Text	     	System	
Lead Owner	OwnerId	Text	     	System	

- ✓ 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

The screenshot displays the 'Lead Stage Management' interface. At the top, the 'Schema Name' is 'ProspectStage' and the 'Display Name' is 'Lead Stage'. Below this, there are two columns: 'Active Stages' and 'Inactive Stages'. The 'Active Stages' column contains a list of stages: Target, Prospect, Warm Lead, Hot Lead, Opportunity, and Customer. The 'Customer' stage is highlighted in green. The 'Inactive Stages' column contains 'Disqualified' and 'Invalid'. At the bottom of each column is an 'Add' button. A 'Move Down' tooltip is visible over the 'Opportunity' stage in the active list.

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

▲ **Lead Source Management**
Manage lead sources



Select Options [Set options as default using radio button]

<input type="text"/>	<input checked="" type="radio"/>	↑	↓	×
Organic Search	<input type="radio"/>	↑	↓	×
Customer Referral	<input type="radio"/>	↑	↓	×
Partner Referral	<input type="radio"/>	↑	↓	×
Employee Referral	<input type="radio"/>	↑	↓	×
Referral Sites	<input type="radio"/>	↑	↓	×
Direct Traffic	<input type="radio"/>	↑	↓	×
Social Media	<input type="radio"/>	↑	↓	×
Pay per Click Ads	<input type="radio"/>	↑	↓	×
Inbound Email	<input type="radio"/>	↑	↓	×
Trade Show	<input type="radio"/>	↑	↓	×
<input type="button" value="Add"/>				

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.

The screenshot displays the 'Lead Forms' configuration page. On the left is a navigation sidebar with categories: 'Lead Settings' (containing 'Lead Fields', 'Lead Stages', 'Lead Sources'), 'Lead Forms' (highlighted), and 'Activities and Scores' (containing 'Core Activities & Scores', 'Custom Activities & Scores', 'Engagement Scoring'). The main content area is titled 'Lead Forms' with a subtitle 'Manage lead edit, quick add, mobile and other forms'. A dropdown menu labeled 'Select form to edit' is open, showing options: 'Create Lead Form' (selected), 'Create Lead Form on Mobile', 'Create Quick Add Form', and 'Agent Pop-up Form'. A red arrow points from the dropdown to the main form area. The main form area is divided into sections: 'Lead Details' (with fields for First Name, Last Name, Email, Phone Number, Mobile Number, and Company), and 'Hidden Fields' (with fields for Search Field, Created By, Engagement Score, and Lead Conversion Date). A blue 'Create Section' button is located on the right side of the form area, with a red arrow pointing to it.

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	Core Activities & Scores ?
Lead Fields	Manage lead scores of core web and email activities
Lead Stages	<div style="text-align: right;">Edit</div>
Lead Sources	
Lead Forms	
Lead Forms	
Activities and Scores	
Core Activities & Scores	

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](#)

Lead Settings

- Lead Fields
- Lead Stages
- Lead Sources
- Lead Forms
- Lead Forms
- Activities and Scores
 - Core Activities & Scores
 - Custom Activities & Scores**

Custom Activities & Scores ?

Manage custom activities and respective scores

Show Add Edit

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.

Engagement Score ?

Engagement Score is calculated based on the recent activities of leads. Here, you can configure the number of days in which the activities should be considered. You can include/exclude which activities correlate to Engagement of leads. Also, you may want to measure engagement of leads which are in certain lead stages, so that too can be configured here.

Activity period (in days)

30

Lead Stages to include

5 selected

Lead Activities to include

13 selected

Save

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.

Sales Activity Settings
Manage Products
Sales Activity Settings
Sales Activity Fields

Sales Activity Settings ▶ Manage Products ⓘ Add Product

You have created 0 of 10 Products.

Search Products

Id +	Name	Created By	Modified By	Actions
No records to display.				

Sales Activity Settings ▶ Activity Fields ⓘ Edit Fields

Field Display Name	Schema Name	Type	Show In form
Product	mx_Custom_1	Product	Yes
Order Value	mx_Custom_2	Number	

Sales Activity Settings ▶ General Settings ⓘ

Display Name

Default Currency Symbol: \$ Abbreviation: USD Name: US Dollars

Change lead stage of a lead to 'Customer' when sales activity is added

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.

Website Form

Step 01 Select Landing Page Template

Step 02 Build Landing Page

Save Section

Your headline goes here

Name *

Email *

Phone Number

Submit

Responsive Landning Page

Form for Blog Subs

Responsive LP Designer

Sobha Demo

Thank you page

Demo LP

13/01/15

UnPublish

Edit

Delete

Clone

View Report

View Summary

Preview

Rename

Hide

Embed

Export Form HTML

Get Landing Page URL

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

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

Create Landing Pages in LeadSquared

Get URL of page in your domain

Add additional UTM parameters (optional)

Use it as destination URL in ads

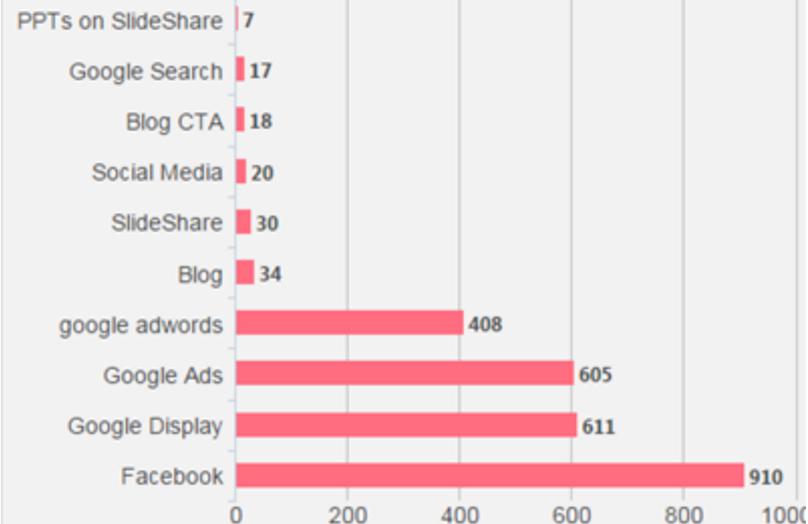
Google AdWords

doubleclick
by Google



Facebook Ads

Top Source Media



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.

Olark Chat Conversation added by Sudhakar Gorti, LeadSquared	
Lead Location	Singapore,Singapore
Chat Started on Web Page	http://www.leadSquared.com/connectors 
Chat Transcript	<p>Hi there, I've got a question about landing page, event registration page and webinar integration</p> <p>Hi Amy</p> <p>yes, please go ahead with the question</p> <p>What we are looking for is a landing page with built-in form followed by pdf file download after form submission. Is this achievable through leadsquared?</p> <p>yes, it is possible</p> <p>great. where will the data be hosted?</p> <p>you may check this link for reference:</p>



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

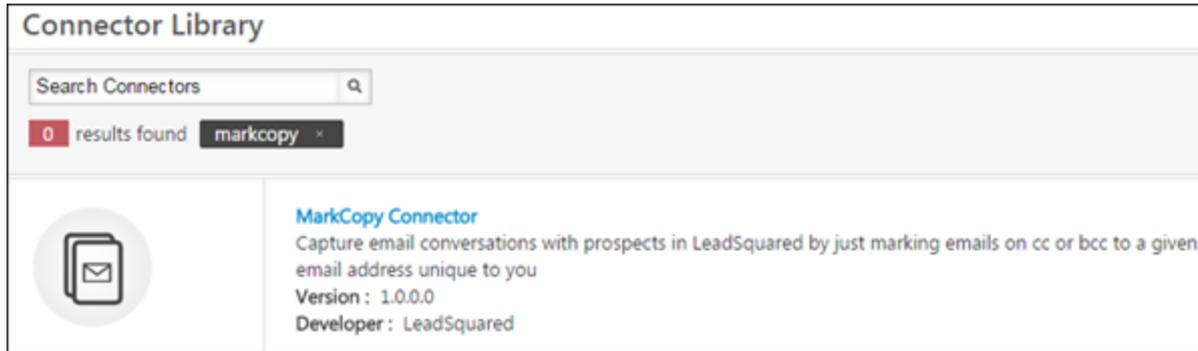


Relevant Help Pages
[Telephony & SMS in LeadSquared](#)

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”



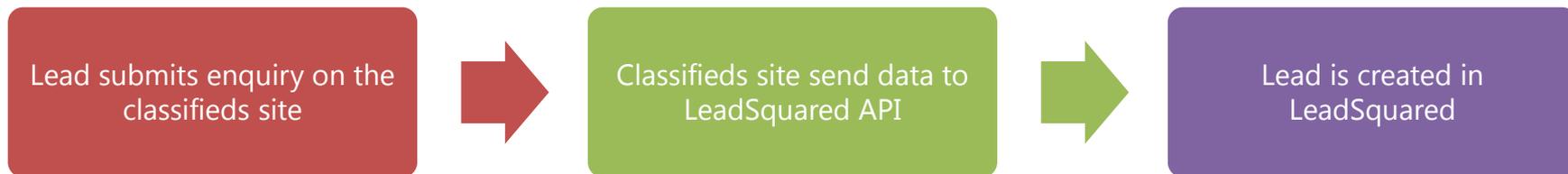
- ✓ Get your organization's @markcopy.com email id after configuring the connector
- ✓ Copy (CC or BCC) to it while sending email from your email client to captured recipients as Leads
- ✓ Auto forward inbound emails to capture Sender as lead
- ✓ Email message is captured in lead activity

Relevant Help Pages

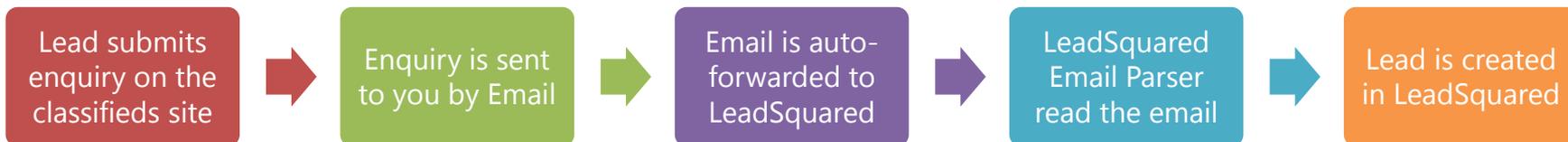
[Capture Email Sender and Recipients as Leads using Markcopy Connector](#)

Capture Leads from Classifieds

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



OR

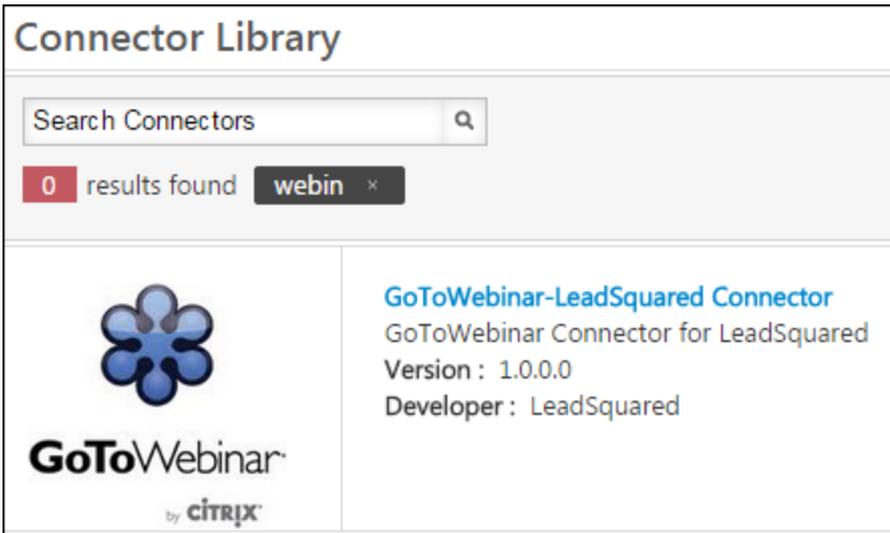


✓ **Additional charges may apply if Email based parsing is used. Please contact sales@leadsquad.com for more information.**

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"



The screenshot shows a web interface titled "Connector Library". At the top, there is a search bar with the text "Search Connectors" and a magnifying glass icon. Below the search bar, it displays "0 results found" and a filter tag "webin" with a close button. The main content area features a connector card for "GoToWebinar-LeadSquared Connector". The card includes the GoToWebinar logo (a blue flower-like shape) and the text "GoToWebinar by citrix". To the right of the logo, the connector name "GoToWebinar-LeadSquared Connector" is displayed in blue, followed by "GoToWebinar Connector for LeadSquared", "Version : 1.0.0.0", and "Developer : LeadSquared".

- ✓ 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](#)



SMS App

LeadSquared V2.0

SMS Marketing Connector 

SMS Connector

Added By : Prashant Singh, LeadSquared
Added On : 12/10/14 03:35:49 PM
<http://help.leadSquared.com/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 ?

Select Lead Distribution Event

When a lead is created ▼

[Webhook Information](#)

Default Rule

This rule will be executed when none of the rules match with the incoming lead.

[Edit Default Rule](#)

- ✓ 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”](#)**

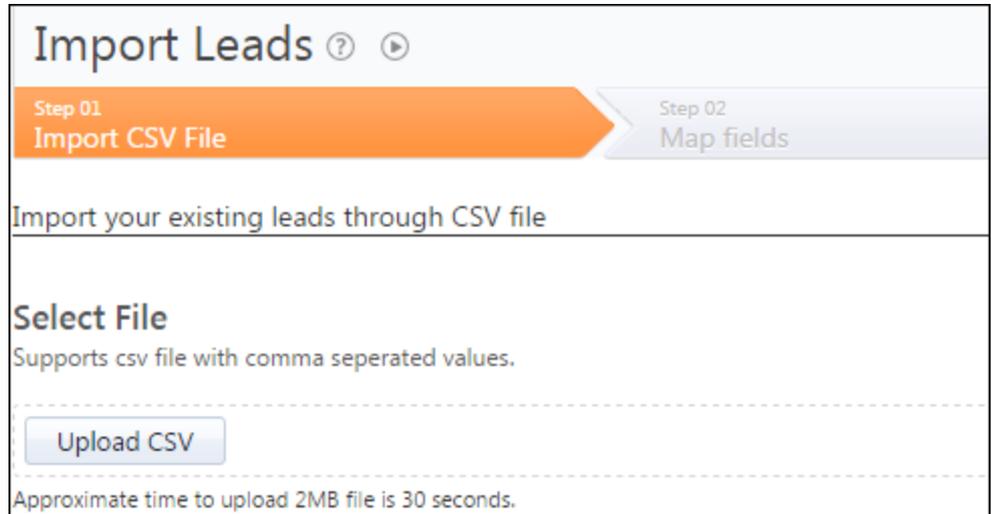
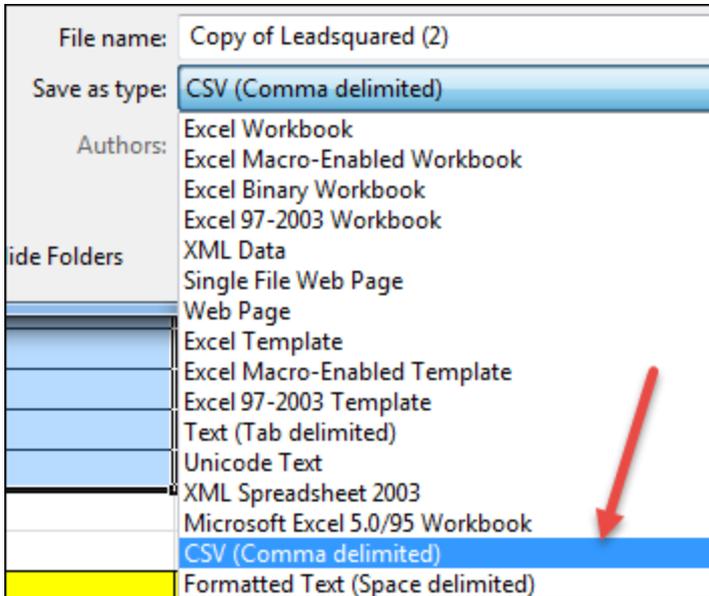
6- Migrate Data

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