

Get Started with LeadSquared

Guide for Marketing Users



Complete lead to revenue platform

Bookmark LeadSquared Login Page

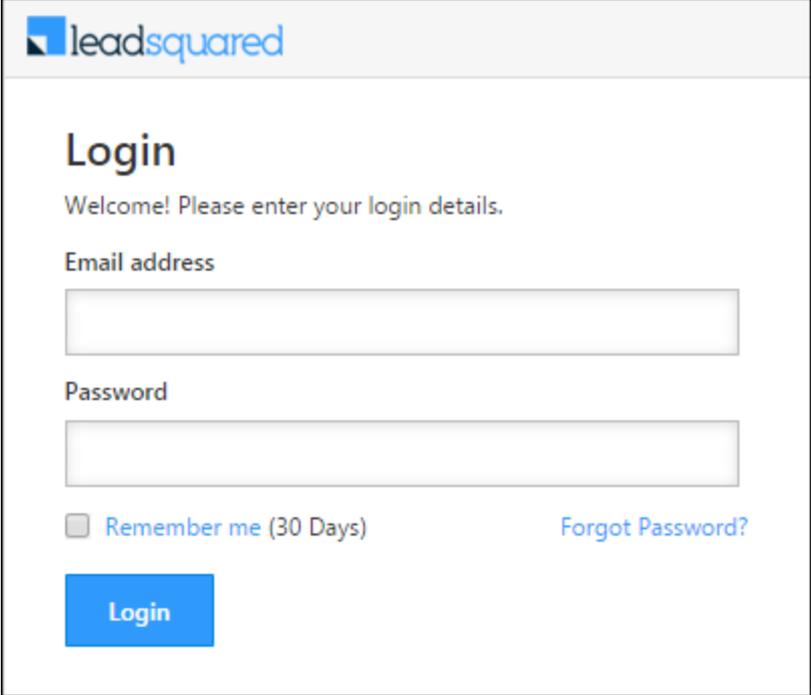
Login to LeadSquared at

<https://run.leadSquared.com>

(Bookmark the URL)

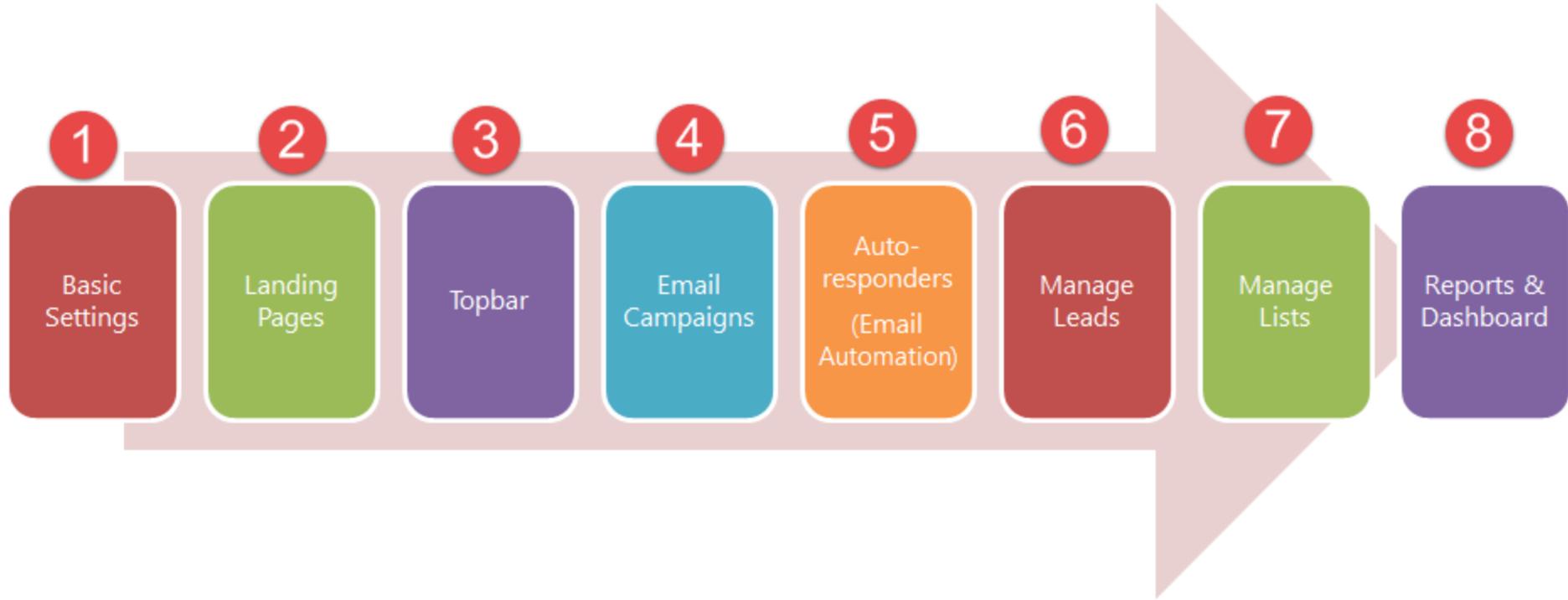
LeadSquared provides best experience in:

- *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.

Account Settings	Personal Settings	My Profile ? Manage your personal profile	
Customization	My Profile	Role	Marketing User
Lead Tracking	My Password	First Name	Demo
Email Settings	My Email Signature	Middle Name	
API and Webhooks	My Report Subscriptions	Last Name	User
	Organization Settings	Email Address	
	Company Profile	Associated Phone Numbers	
	Request History	Show Incoming Call Popup	Disabled
		Date Format	dd/mm/yy
		Time Zone	(GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi

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	

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.

Configure CNAME

Edit Settings on your Domain Registrar such as GoDaddy or Network Solutions.

Typically you would require to create following new properties in your DNS:

1. Alias: Enter [click.myleadsquared.com](#) as the vanity.
2. Type: Select [CNAME](#).
3. Points To: Enter [go.transfersecure.net](#)

Connection Status:  Connected as your Email Links Domain

Once you are done with the CNAME change, confirm it by clicking below:

[Confirm New Domain](#) 

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. A 'Move Down' tooltip is visible over the 'Opportunity' stage. The 'Inactive Stages' column contains 'Disqualified' and 'Invalid'. At the bottom of each column is an 'Add' button.

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

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"/>	↑	↓	×

Add

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](#)

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](#)

Install LeadSquared for Mobile

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



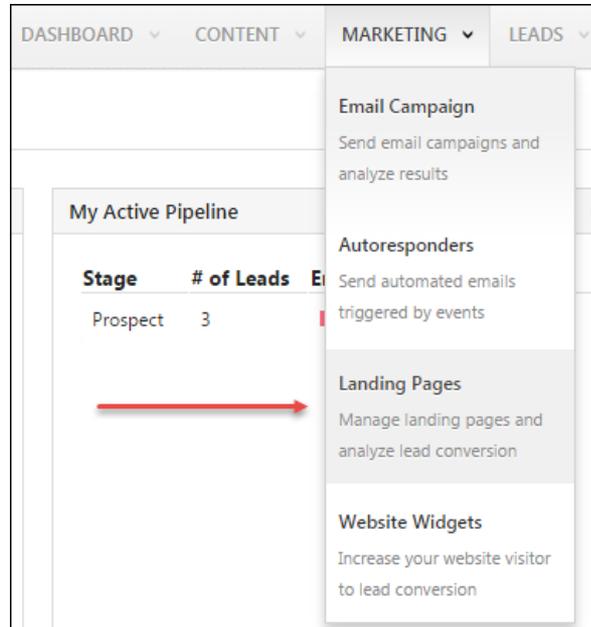
2- Landing Pages

What is Landing Page?

Landing Page is a web page containing a marketing offer and is optimized to trigger call-to-action like form submission or navigation to another page.

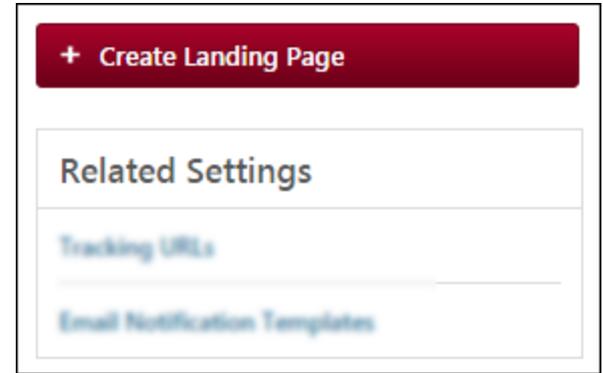
LeadSquared helps you in quickly creating and publishing conversion optimized landing pages that work well on desktop, laptop, tablet and mobile. LeadSquared sign-up page <http://go.leadSquared.com/start> is an example of landing page.

To start working with Landing Pages, navigate to [Marketing -> Landing Pages](#) and click "Create Landing Page" button



The screenshot shows the LeadSquared dashboard with a navigation menu at the top: DASHBOARD, CONTENT, MARKETING, and LEADS. The 'MARKETING' menu is expanded, showing options: Email Campaign (Send email campaigns and analyze results), Autoresponders (Send automated emails triggered by events), Landing Pages (Manage landing pages and analyze lead conversion), and Website Widgets (Increase your website visitor to lead conversion). A red arrow points from the 'Landing Pages' option to the right. Below the menu, a section titled 'My Active Pipeline' contains a table with columns 'Stage', '# of Leads', and 'E'. The table has one row: 'Prospect' with '3' leads.

Stage	# of Leads	E
Prospect	3	



The screenshot shows a dark red button with a white plus sign and the text '+ Create Landing Page'. Below the button is a section titled 'Related Settings' with two links: 'Tracking URLs' and 'Email Notification Templates'.

LeadSquared Landing Page Designer

There are many ways you can start creating a landing page. We recommend to start with "Use Responsive Templates" option.

The screenshot displays the 'Step 01 Select Landing Page Template' stage of the LeadSquared Landing Page Designer. At the top, a progress bar shows four steps: Step 01 (selected), Step 02 'Build Landing Page', Step 03 'Actions', and Step 04 'SEO Options'. Below the progress bar, there is a text input field for 'Landing Page Name *'. The main question is 'How would you like to create Landing page? *'. On the left, four options are listed: 'Use Responsive Templates' (highlighted with a blue bar and a red arrow), 'Use Normal Templates', 'Copy from Existing Landing Page', and 'Use your own Template / HTML'. On the right, three template cards are visible: 'Blank Template', 'Blue signup', and 'Course signup'. A red box highlights the text 'New Templates for responsive pages' above the 'Course signup' template. Each template card includes a 'Select' button with a checkmark and a 'Preview' button with an eye icon.

Step 01 Select Landing Page Template

Step 02 Build Landing Page

Step 03 Actions

Step 04 SEO Options

Landing Page Name *

How would you like to create Landing page? *

Use Responsive Templates

Use Normal Templates

Copy from Existing Landing Page

Use your own Template / HTML

Blank Template

Blank

Select Preview

Blue signup

Write your best three features here

Select Preview

Course signup

Your headline goes here

The supporting sub headline goes here

How we are different ?

Join the free session

Select Preview

New Templates for responsive pages

Creating Responsive Pages

You can build beautiful conversion optimized landing pages using our Responsive Editor.

Use our powerful and intuitive landing page designer. You can add html, image, CTA, media, features and many other types of content.

The screenshot shows the 'Responsive Landing Page' editor interface. At the top, there are four steps: Step 01 (Select Landing Page Template), Step 02 (Build Landing Page), Step 03 (Actions), and Step 04 (SEO Options). Below the steps is a toolbar with icons for Save, Section, Block, CTA, and other actions. The main workspace is a light gray area with a dashed orange border, containing a blue circle icon and the text 'Select a block from the toolbar'. On the right side, there is a settings panel for 'Section 1' with various options like Dimension & Spacing, Background, Border, Box Shadow, Visibility, and Advanced > CSS. Four red callout boxes with white text are overlaid on the interface: 'Add and edit sections' points to the Section icon in the toolbar; 'Use different types of content blocks' points to the Block icon; 'Preview on Desktop, Mobile and Tablet' points to the Preview button; and 'Set Canvas, Block and Section Properties' points to the settings panel.

Click here for a quick tour

Download PDF Guide

Click Next Button after you finish the design

Configure actions after Landing Page submission

You can decide what experience you want to provide to the lead after landing page submission

What happens after the visitor submits the landing page?
Show visitor a Thank You message, redirect him to another URL or Provide him a document to download

Gets a Thank You message or Is redirected to a URL or Downloads a document **1**

Where should the Thank You message be shown?

Message above the form On a Popup

Message will be shown above the form after form submission.

Thank you for your interest.

272 characters remaining

Auto Response Email to Lead **2**

Send Notification to the Marketer **3**

Other Actions

Assign Leads to **4**

Add Leads to List **5**

Increase Lead score by **6**

Embed JavaScript **7**

1. Select among showing thank you message, redirecting to another URL and downloading document
2. You can send a personalized Autoresponder email to lead
3. You can trigger notification to your team and external parties about lead submission
4. Assign the leads to any LeadSquared user of your organization
5. Add the submitted leads to a list that can be nurtured later
6. Assign custom lead score to leads submitting on the landing page
7. Embed your custom JavaScript (e.g. you can embed Google Analytics script here)

Click Next Button after configuring actions

Configure SEO Options

You can improve visibility of landing page in search engine results by updating SEO options

Page Title
This is the title that will appear on the browser when someone is looking at the page

Title display in search engines is limited to 70 characters, 46 characters left.

Landing Page URL
Following URL will be used to access published Landing Page.

<http://pages.myleadsquared.com/>

Meta keywords
Provide meta keywords, the page will show up in the search results when the user searches by any of the specified keywords on any search engine.

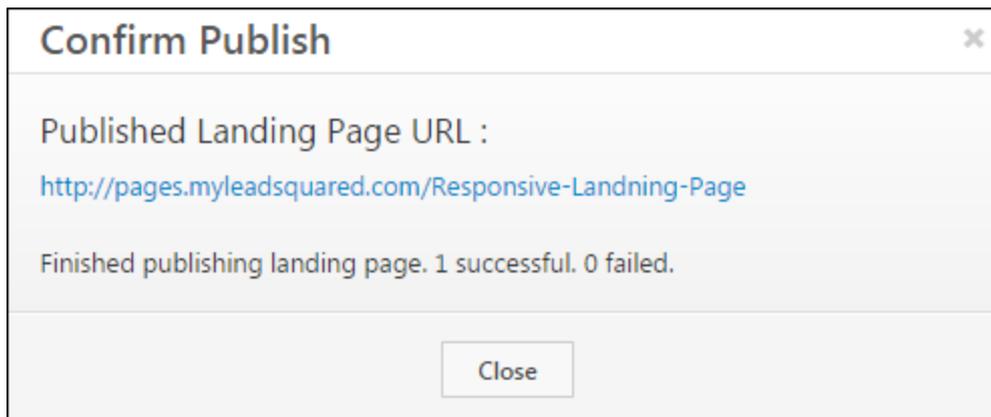
The meta keyword is limited to 156 characters, 156 characters left.

Specify Page Title, Landing Page URL, Meta Keywords and Description to make landing page discoverable on search engines.

Click Next Button after configuring SEO Options

Review Summary and Publish

Check summary of your landing page and actions and publish if no changes needed



- ✓ The published landing page is available to be used using the URL given to it.
- ✓ You can always edit the landing page and republish it.
- ✓ You can unpublish a landing page if you don't need it

The landing pages can be linked to your website domain. See [this slide](#) for the landing page domain settings.

Organize your Landing Page

You can organize all your landing pages on home page of Landing Page Feature

Navigate to [Marketing -> Landing Pages](#)

<input type="checkbox"/> Landing Page Name	Views	Submissions ↓	Conversion Rate (%)	Status	Created By	Modified On	Actions
<input type="checkbox"/> Automated Free Trial Sign up (13.01.2014) *	12106	3547	29.3	Published	Agency User	14/10/14	
<input type="checkbox"/> E-Book - 4 steps to convert website visitors to leads *	3675	1006	27.4	Published	Meenu Joshi, LeadSquared		
<input type="checkbox"/> Automated Free Plan Sign up	1557	750	48.2	Published	Nilesh Patel		
<input type="checkbox"/> E-Book: Lead Gen through Facebook Ads *	2100	552	26.3	Published	Rajat Arora		
<input type="checkbox"/> EBook: 5 Steps to Create Facebook Landing Pges	915	543	59.3	Published	Meenu Joshi, LeadSquared		
<input type="checkbox"/> Free Plan Signup - Facebook Leads (India)	604	509	84.3	Published	Meenu Joshi, LeadSquared		

1. Unpublish the page (take it offline)
2. Embed: Use the option to embed landing page as an iFrame in another web page
3. Export Form HTML: Just get the HTML code of the form to capture leads from your website
4. Get HTTPS URL of the landing page

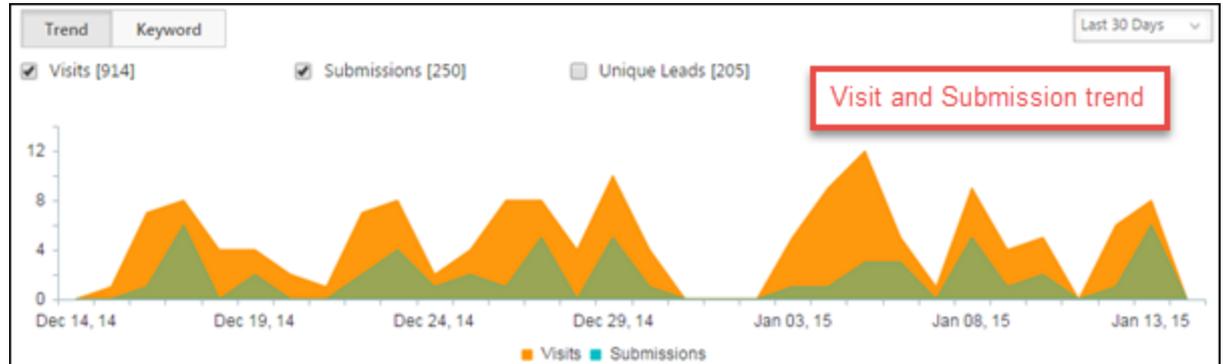
View Landing Page Report

Once you start using landing pages, you can get analytics on views, submissions, conversion rate, lead sources and keywords from Landing Page Report

Navigate to [Marketing -> Landing Pages](#) and click on a published landing page (published pages have  icon in front of them) to see the report

Lead Sources ←

SOURCE	SUBMISSIONS / VISITS
Direct Traffic	+67 / 459
Pay per Click Ads	+53 / 146
Organic Search	+44 / 209
Social Media	+10 / 26
eBook	+2 / 5
SlideShare	+1 / 4
Partner Referral	+1 / 2



3-Website Widgets: Topbar

What is Topbar?

Topbar is a website widget that you can use to publish a marketing offer on top border of the website.

A Topbar will normally have an offer description and a Call-to-action (CTA button) that will link to a lead capture page (landing page).



The screenshot shows a web browser at the URL www.leadSquared.com. At the top of the page, there is a red banner (the Topbar) with the text "[Free Webinar] 7 Killer Content Marketing Strategies for 2015" and a black button labeled "Register Now!". Below the banner is a dark navigation bar with the "leadSquared" logo on the left and links for "SOFTWARE", "PRICING", "ABOUT", "RESOURCES", "LOGIN", and "SIGN-UP" on the right. A white arrow points from a red-bordered box labeled "TopBar" to the red banner. The main content area below the navigation bar has a light blue background with the text "Land More Leads, Close More Deals." and "The complete marketing and sales automation software."

Note: To publish LeadSquared Topbar on your website, you must have [LeadSquared Website Tracking script](#) on your web pages.

How to create Topbar in LeadSquared?

You can easily create & publish Topbars in LeadSquared and analyze their performance.

Navigate to [Marketing -> Website Widgets](#) and click Topbar under Create Widget. Give topbar a name and click Edit.

Website Widgets ?

Search

Status Type

[Create Widget](#)

Topbar

Name	Type	Modified By	Modified On ↓	Status	Actions
------	------	-------------	---------------	--------	---------

Topbar Widget ?

Name

Design

Your headline goes here. [\[Click Here \]](#)

[Edit](#)

This is a suggestive preview of the Topbar. To view the actual Topbar, click on edit.

Topbar Editor

Fill in the details in Topbar editor. Specify headline, CTA name and target URL.

Webinar - How to become a Smart Real Estate Marketer!

Register Now!

Topbar Settings

Apply Skins orange red green blue purple black white

Headline

Text

Text Color

Background

Button

Text

Text Color

Background

Link

Show Close Button

- ✓ You can choose from color skins
- ✓ You can customize foreground and background colors
- ✓ Provide an option to visitor to close the topbar.
- ✓ Save when you are done.

Update the visibility and duration settings

You have variety of options to decide when and on which pages topbar should be shown.

Placement

Visibility

- All Webpages
- All Webpages
- Specific Webpages
- Exclude on Specific Webpages

Duration

Show from 13/01/15 06:36 PM No End Date

Do not show on Sun Mon Tue Wed Thu Fri Sat

- ✓ You can choose to have topbar on all your website pages OR specific pages
- ✓ You can also choose to have it on all pages except specific ones
- ✓ You can choose a time duration to keep it active
- ✓ You can select certain days of week when topbar should NOT be shown
- ✓ Save and Publish the topbar after making all changes.

Organize your Topbars

After publishing you can manage your Topbars in Marketing -> Website Widgets page .

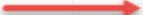
Website Widgets ?

Search 

 Create Widget 

Status Type

Name	Type	Modified By	Modified On ↓	Status	Actions
 How to be a Smarter Real Estate Marketer	Topbar	Shibani Roy, LeadSquared	07/01/15 02:18 PM	Published	
 How to Get the Best Traffic to Lead Conversions from your Website (EST)	Topbar	Nilesh Patel	18/12/14 06:06 PM	Draft	 <ul style="list-style-type: none">UnpublishView SummaryView Report



Select "View Report" to see Topbar performance.

Review Topbar Reports

Check Topbar Performance Reports

Topbar Report

How to Increase Opens, Clicks & Conversions of Your Emails

Select time period: Last 60 days

▶ Run Report

Views
4287

Clicks
62

Conversion
1.45%

TopBar Activity By Page

◀◀ ◀ Page 1 of 5 ▶ ▶▶

Web Page	Views	Clicks
http://www.leadquared.com/	1911	39
http://www.leadquared.com/pricing	288	5

Leads who clicked on this Topbar

◀◀ ◀ Page 1 of 2 ▶ ▶▶

Name	EmailAddress	Phone Number	Lead Source	Lead Score
John Doe	john.doe@leadquared.com	(555) 123-4567	Organic Search	145
Jane Smith	jane.smith@leadquared.com	(555) 987-6543	Organic Search	86
Bob Johnson	bob.johnson@leadquared.com	(555) 234-5678	Organic Search	446

4- Email Campaigns

How to send Email Campaign to Leads?

LeadSquared allows sending email campaigns to leads and analyze the open/click events

To get started, navigate to [Marketing -> Email Campaigns](#) and click "Create Email Campaign" button

Email Campaigns

Search Campaigns

Actions

+ Create Email Campaign

Related Settings

Status All Created By Any Date Range Created On All Time Show Hidden

Name	Status	Scheduled Date	Last Activity	Recipients	Delivery Report	Actions
------	--------	----------------	---------------	------------	-----------------	---------

Selecting a template for Email Campaign

You can select an existing template, copy an existing email campaign or start with blank html/text editors

Email Campaign Name * 

How would you like to create Email? *

Use Email Template

Copy from Sent Emails

Use HTML Editor

Create Text Email



Ebook Download Email 01

Select Preview



Webinar Invitation 01

Select Preview



Generic Newsletter 01

Select Preview



Happy New Year 2



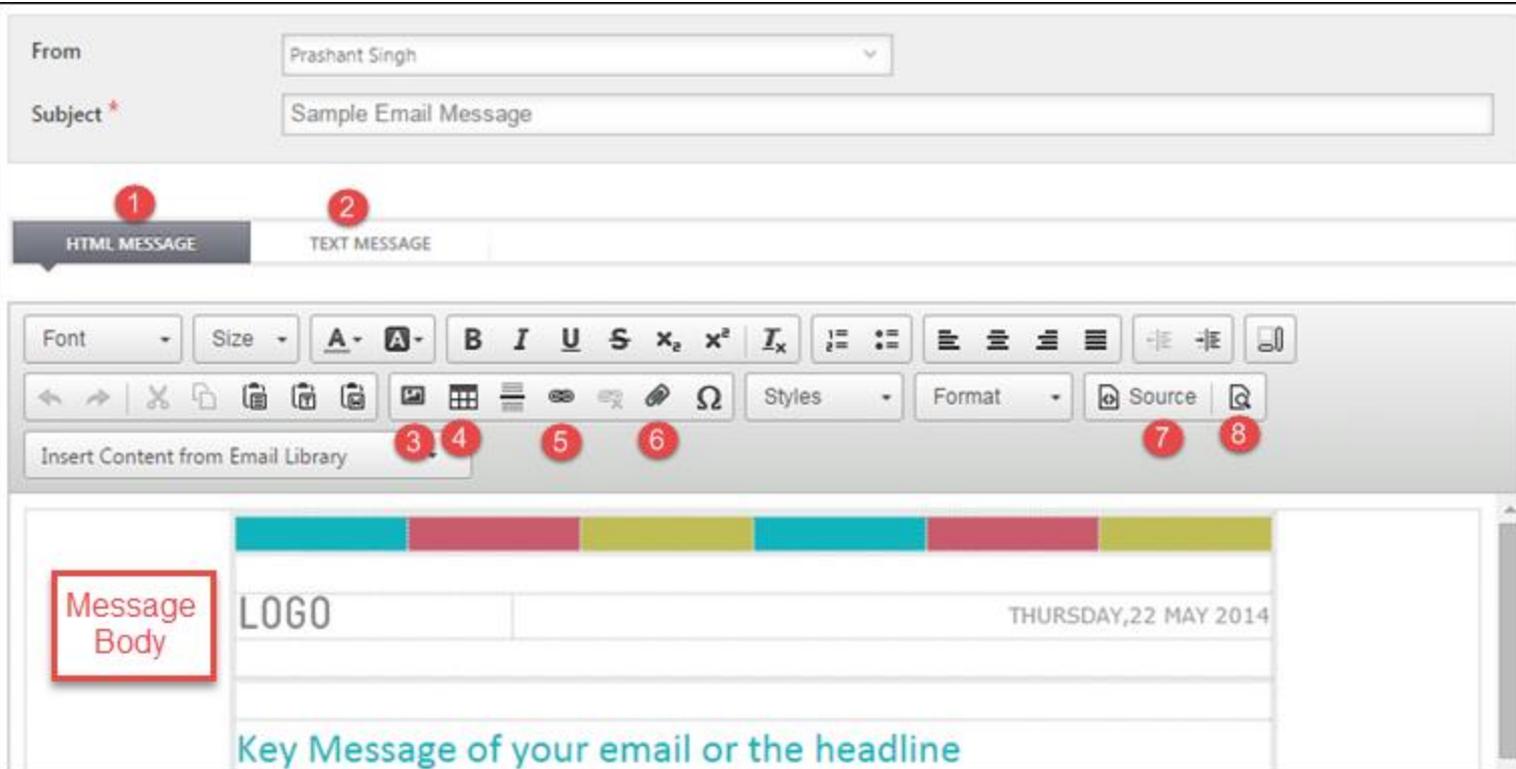
Diwali Template 01



Diwali Template 02

Create the Email Message

Select Sender, write subject and compose message



1	Create HTML version of message
2	Create text version of message
3	Insert Images
4	Insert Tables
5	Hyperlink
6	Insert Attachments
7	View and edit HTML source
8	Preview the Email

Testing Email Message

You must send a test message before you move to next step.

Send Test Emails *
Send test email to following email addresses for review

prashant@leadsquared.com,
singh.pk@gmail.com

Example: abc@xyz.com,abc@b2c.com...



- ✓ Send test message to verify if all elements of the email look fine
- ✓ Send test message to email accounts configured in outlook and mac email client if you are sending campaign to business users
- ✓ Send test message to email accounts configured in Gmail, yahoo etc. if you are sending campaign to consumers
- ✓ Check test email on mobile devices also

Select Recipients

Select list of people whom you want to send Email Campaign. You can also specify an exclusion list in Suppression List section

Recipient Lists

10 Jan Webinar Registrants (Suppression List for Reminder Email) 10 Jan Webinar Registrants (Suppression List for Reminder Email)

7 days old and prospect 7 days old and prospect

[+ Add](#)

or

[Create Recipient List](#)

Suppression Lists

Leads in these Lists will not receive the Email

29Aug-event-prospects-Subha 29Aug-event-prospects-Subha

[+ Add](#)

or

[Create Suppression List](#)

- ✓ Select one or more Lists of recipients
- ✓ To know about lists check [Manage Lists](#)
- ✓ Upto 25 lists can be specified
- ✓ Suppression List: you can maintain a list of leads who should not receive the email even if they are part of any recipient list

Review the Campaign before Scheduling

Verify the message, recipient lists before scheduling the campaign. You can send it for peer or manager review also.

Campaign Details

Name	:	simple campaign
From	:	Nilesh Patel
# of Recipients	:	45 
Recipient Lists	:	19 10 Jan Webinar Registrants (Suppression List for Reminder Email) 31 7 days old and prospect
Suppression Lists	:	30 29Aug-event-prospects-Subha

HTML Message

Sender : Nilesh Patel
Subject : Hi @[Lead:FirstName,], rest of subject

[Preview in browser](#)

LOGO

THURSDAY, 22 MAY 2014

Lorem Ipsum adalah contoh teks

Send for Review

Send email campaign summary to following recipients for review

prashant@leadsquared.com

Example: abc@xyz.com,abc@b2c.com...

Send

Schedule the Campaign

The email can be sent immediately or scheduled for future.

Send Email Campaign

Send the email campaign immediately.

Schedule Email Campaign

Choose the date and time to send the email campaign.

Select Date

15/01/15 

Select Time

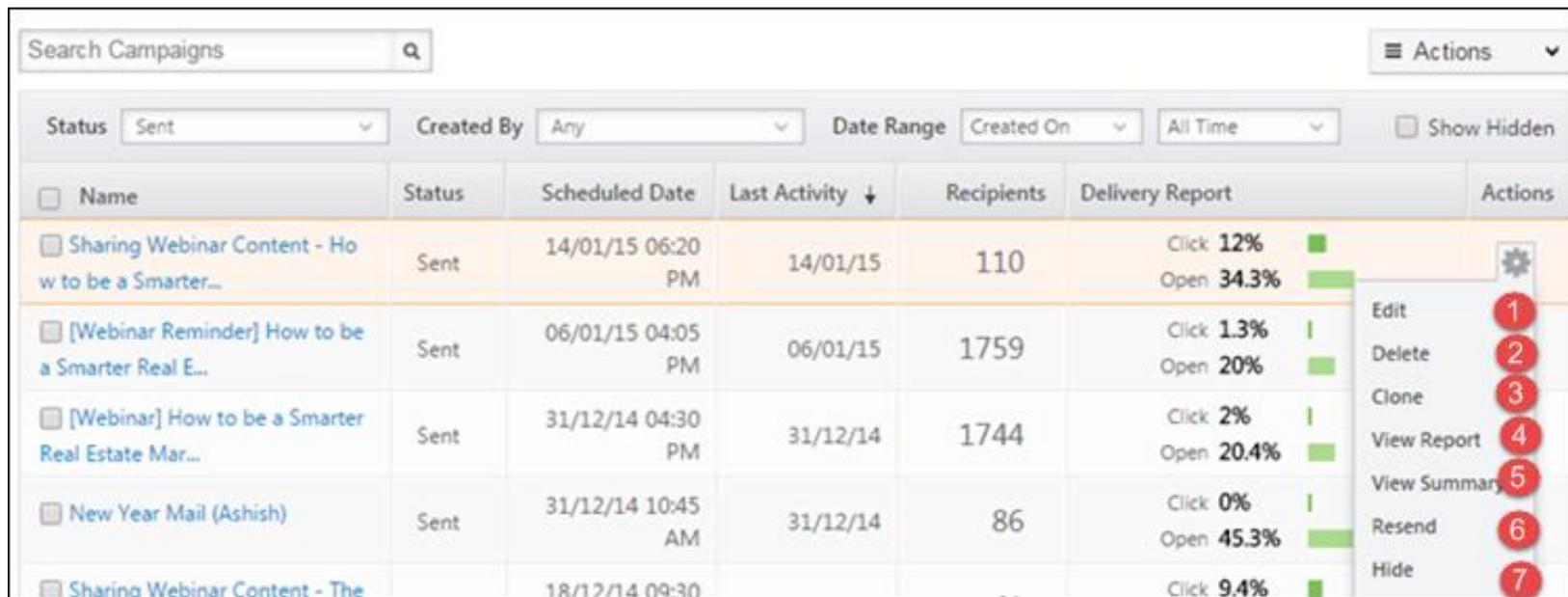
05:49 PM  (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi 

Current User Date & Time: 15/01/15 05:50 PM (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi

- ✓ If you send email campaign immediately, it cannot be stopped.
- ✓ Scheduled email campaigns can be stopped and changed before scheduled date-time

Organize all your Email Campaigns

You can organize and review all your Email Campaigns at the home page of the feature (**Marketing -> Email Campaigns**)



The screenshot displays the 'Email Campaigns' management interface. At the top, there is a search bar labeled 'Search Campaigns' and an 'Actions' dropdown menu. Below this are filter options for 'Status' (set to 'Sent'), 'Created By' (set to 'Any'), 'Date Range' (set to 'Created On'), and 'All Time'. A 'Show Hidden' checkbox is also present. The main table lists campaigns with columns for Name, Status, Scheduled Date, Last Activity, Recipients, and Delivery Report. The first row is highlighted in orange. An actions menu is open for the first campaign, showing options: Edit (1), Delete (2), Clone (3), View Report (4), View Summary (5), Resend (6), and Hide (7).

Name	Status	Scheduled Date	Last Activity ↓	Recipients	Delivery Report	Actions
Sharing Webinar Content - How to be a Smarter...	Sent	14/01/15 06:20 PM	14/01/15	110	Click 12% Open 34.3%	Edit Delete Clone View Report View Summary Resend Hide
[Webinar Reminder] How to be a Smarter Real E...	Sent	06/01/15 04:05 PM	06/01/15	1759	Click 1.3% Open 20%	
[Webinar] How to be a Smarter Real Estate Mar...	Sent	31/12/14 04:30 PM	31/12/14	1744	Click 2% Open 20.4%	
New Year Mail (Ashish)	Sent	31/12/14 10:45 AM	31/12/14	86	Click 0% Open 45.3%	
Sharing Webinar Content - The		18/12/14 09:30			Click 9.4%	

1	2	3	4	5	6	7
Edit the campaign	Delete an Email Campaign	Clone an email campaign	See the delivery report	Check the summary of campaign	Resend: Send email to new members of the list	Hide the campaign

Review Campaign Performance

Click any sent email campaign to review the delivery and open/click report

Sharing Webinar Content - How to Convert More Visitors to Leads from your Website (IST)

Sent

Created By :
Shibani Roy, LeadSquared

Sent/Scheduled On :
03/12/14 / 04:00 PM

188 Emails sent



192
Target Recipients

4
Excluded Recipients

100% Delivered [188 Emails]



Open 46.3%

Click 14.4%

Report Spam 0%

Unsubscribed 0%

Top Performing Email Links

26 <http://pages.leadSquared.com/webinar-video-how-to-convert-mo...>

9 <https://dwmbily8o2kmd.cloudfront.net/t/LeadSquared/content/m...>

5 <http://blog.leadSquared.com/webinar-how-to-get-the-best-traf...>

5- Email Automation using Autoresponders

What is Email Automation?

Email Automation helps in sending series of automated email messages to leads based on their profile and behavior.

Examples:

- ✓ Sending series of educational emails when a person signs up for your product / service.
- ✓ Send series of nurturing emails when a lead looks at your pricing page.
- ✓ Send series of offers to leads who add product to your online shopping cart but do not complete the purchase.
- ✓ Send reminders to inactive leads to use your product again
- ✓ Send reminders to customers about upcoming maintenance schedule

Engaging leads with such automated personalized emails is also called Drip Marketing.

You can conduct Drip Marketing with LeadSquared “Autoresponders”.

Relevant Help Pages

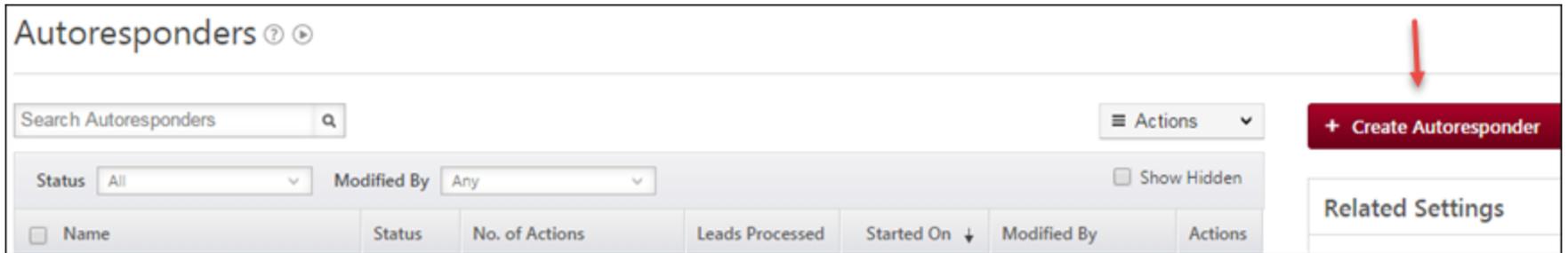
[How to create and schedule Autoresponders?](#)

[Sending Autoresponder Emails to Leads from Landing Pages](#)

How to create Autoresponder?

You can create new Autoresponder campaigns in few easy steps.

Navigate to [Marketing -> Autoresponders](#) and select "Create Autoresponder"



Autoresponders

Search Autoresponders

Status: All Modified By: Any Show Hidden

Name	Status	No. of Actions	Leads Processed	Started On	Modified By	Actions
------	--------	----------------	-----------------	------------	-------------	---------

+ Create Autoresponder

Related Settings

Give it a name and description

Name of the Autoresponder *

Sample Autoresponder

Description

Sample Autoresponder.

Select a list that receives Autoresponder Emails [Option 1]

You can send Autoresponder to all new members of a selected list or leads matching criteria that you specify. **Lets look at the first option (members of static list)**

1. Select the name of List whose members will receive Autoresponder
2. Specify lead stages that should be excluded from Autoresponder. Leads in any of the selected stages will not receive email.
3. Chose if Autoresponder should be sent to existing members of static list

Select recipients of autoresponder

Member of a Static List **1** Option 1

Select List

Type to Search v

Select Leads Matching Criteria Option 2

Exclude leads in these lead stages **2**

Target Prospect Warm Lead Hot Lead Opportunity Customer Disqualified

Invalid

Run autoresponder on all existing leads of the selected list **3**

Specify when members of List get Email

When you setup Autoresponder on members of static list, only one trigger is available: Leads Added to List. All leads that get added to list will get the Autoresponder Emails.

Sample Autoresponder ?

Step 01 ✔
Autoresponder

Step 02 ✔
Select Recipients

Step 03
Trigger

Step 04
Actions

Autoresponder triggers when

Lead is Added to List

You have selected list "Blog Subs" for the trigger.

Specify criteria to determine Leads that will get Email [Option 2]

You can send Autoresponders to leads matching criteria that you specify on lead profile.

Select recipients of autoresponder

- Member of a Static List
- Select Leads Matching Criteria

Select Criteria

Example: All leads with lead score > 100 and lead stage is opportunity

1. Click the Select Criteria option
2. Specify the search criteria and add it. You can combine multiple conditions.
3. Specify lead stages that should be excluded from Autoresponder. Leads in any of the selected stages will not receive email.

Select Criteria

Select Search Criteria

Address 1

is

+ Add

Reset

Search for Leads that Match Any Criteria All Criteria

Engagement Score is greater than or equal to "20"

and Lead Source is Social Media and referral source of the lead contains facebook

Exclude leads in these lead stages

- Target Prospect Warm Lead Hot Lead
- Invalid

Specify the event that will start Autoresponder Emails

There are 3 trigger points available when you use "Select Leads Matching Criteria".

First two triggers are captured in this slide.

Autoresponder triggers on

Lead Creation or Lead Stage Change or Lead Activity

Trigger starts when lead is created and matches the criteria defined.

Use "Lead Creation" as trigger if you want Autoresponder to go to all new leads that match criteria defined in the previous step.

Autoresponder triggers on

Lead Creation or Lead Stage Change or Lead Activity

When Lead stage changes to

Target	▼
Target	
Prospect	
Warm Lead	
Hot Lead	

Use "Lead Stage Change" as the trigger if you want to send Autoresponders to leads after their stage is changed to a new one. For example, you can trigger emails when stage is changed to "Opportunity"

Specify the event that will start Autoresponder Emails

There are 3 trigger points available when you use "Select Leads Matching Criteria". The third trigger is on "Lead Activity".

Autoresponders can be triggered on 4 types of activities:

- 1) **Webpage visit** : When Leads visit your website pages or landing pages
- 2) **Custom Activity**: When you add an activity to the leads (like "Demo Happened")
- 3) **Email Opened**: When Leads open Emails
- 4) **Email Clicked**: When Leads click links in Emails

Autoresponder triggers on

Lead Creation or Lead Stage Change or **Lead Activity**

Select Activity Type:

Select Campaign:

Select Link:

- Webpage Visit
- Custom Activity
- Email Opened
- Email Clicked**

Selecting Webpage Visit as trigger

You can select one or more website pages or landing pages. When Lead visits these, the Autoresponder will start.

Autoresponder triggers on

Lead Creation or Lead Stage Change or **Lead Activity**

Select Activity Type: Webpage Visit

Select Webpages: Type to Search + Add

- http://pages.myleadsquared.com/Form-for-Blog-Subs x
- Responsive Landning Page x
- http://pages.myleadsquared.com/Thank-you-page x

Autoresponder is triggered when lead visits any of these pages.

Restrict Autoresponder to trigger only once per lead in 30 days.

- ✓ An example is Lead visiting your pricing page. You can send an email 1 hour after the visit.
- ✓ Be sure to verify the “Restrict Autoresponder to trigger only once per lead” setting. You would not want to send an email to lead evert time they see a page.

Selecting Custom Activity as trigger

You can select a custom activity as the trigger point. When such activity is added, the Autoresponder will start.

The screenshot shows the 'Autoresponder triggers on' configuration panel. At the top, there are three buttons: 'Lead Creation', 'Lead Stage Change', and 'Lead Activity'. The 'Lead Activity' button is highlighted in blue. Below this, there is a 'Select Activity Type' dropdown menu with 'Custom Activity' selected. Underneath, the 'Select Activity' dropdown menu is open, showing a list of activities. 'Had a Phone Conversation' is selected and highlighted in blue. Other visible activities include 'Email Received', 'Email Sent', 'Left a Voice Mail', 'Met in person in Tradeshow', 'SMS Sent', 'Spoke with Gatekeeper', and 'Topbar CTA button clicked'. The 'Restrict Autoresponder to trigger' section is partially visible at the bottom left.

- ✓ An example is triggering Autoresponder after a good demo or meeting happens with a lead.
- ✓ Be sure to verify the "Restrict Autoresponder to trigger only once per lead" setting. You would not want to send an email to lead every time you add a custom activity.

Selecting Email Opened as trigger

You can setup Autoresponder Email to people who open one of your future Email Campaigns.

Autoresponder triggers on

Lead Creation or Lead Stage Change or **Lead Activity**

Select Activity Type: Email Opened

Select Campaign: Sample Email Campaign

Restrict Autoresponder to trigger only once per lead in 30 days.

- ✓ You will be able to select Email Campaigns that are in draft status. The Autoresponder will work only on future email campaigns that are sent after Autoresponder starts.

Selecting Email Clicked as trigger

You can setup Autoresponder Email to people who click a particular link in one of your future Email Campaigns.

Autoresponder triggers on

or or

Select Activity Type

Select Campaign

Select Link

Restrict Autoresponder to trigger only once per lead in days.

- ✓ You will be able to select Email Campaigns that are in draft. The Autoresponder will work only on future emails campaigns that are sent after Autoresponder starts.
- ✓ You can select one link per Autoresponder

Relevant Help Pages

[Triggering Autoresponder based on Open/Click in Email Campaigns](#)

Next Step: Define Sequence of Emails

After specifying trigger, you can move to next step where you can create sequence of Email Messages

Create actions to execute when autoresponder is triggered

Action Name

Email # 1 - Welcome Email 1

2 Set Email Content
(No Content Set)

When should autoresponder email be sent? 3

After 2 Day(s) of the trigger event

Control day and time of email delivery

4 Specify Time 01:00 AM

and what are your preferred days to send email?

Mon Tue Wed Thu Fri Sat Sun

5

1. Give the action or step a name
2. Write Email content (sender, subject and message) for the step
3. Choose after how many hours or days from trigger point the email message should be sent
4. You can choose the preferred email delivery days and time
5. Save the step to add another one

Create more steps in Autoresponder

You can add up to 20 steps in each Autoresponder

The screenshot displays a configuration interface for an autoresponder with two steps. Each step is a card with a left column for content and a right column for scheduling. Step 1 is titled 'Email # 1 - Welcome Email' and is scheduled to be sent 'After 2 Day(s) of the trigger event' with 'Control day and time of email delivery' checked and 'Specify Time' set to '01:00 AM'. Step 2 is titled 'Email # 2 - Educational Email' and is scheduled to be sent 'After 4 Day(s) of the trigger event' with 'Control day and time of email delivery' unchecked. A red callout bubble with the text 'Add More Steps' points to a button labeled 'Add Another Action' at the bottom left.

Action Name
Email # 1 - Welcome Email

[View Email Content](#)
Thank you for the call today

When should autoresponder email be sent?
After 2 Day(s) of the trigger event

Control day and time of email delivery

Specify Time 01:00 AM

and what are your preferred days to send email?
 Mon Tue Wed Thu Fri Sat Sun

Action Name
Email # 2 - Educational Email

[View Email Content](#)
10 ways you can increase traffic on your website

When should autoresponder email be sent?
After 4 Day(s) of the trigger event

Control day and time of email delivery

Add More Steps

Add Another Action

Review the Autoresponder and Start it

In the next step you can review all elements of Autoresponder and start it.

Sample Autoresponder

Sample Autoresponder.

The autoresponder will be sent to all leads matching criteria:

Lead Source is Social Media and referral source of the lead contains facebook

and Engagement Score is greater than or equal to "20"

The autoresponder will be triggered 'When lead activity is Email Link Clicked in Sample Email Campaign and link clicked is <http://www.marketxpander.com>'.

The autoresponder is restricted to trigger only once per lead in 30 days.

Actions

Email # 1 - Welcome Email | [\(View Email\)](#)

Subject : Thank you for the call today

From : Lead Owner

Scheduled : 2 Days after the event "When lead activity is Email Link Clicked in Sample Email Campaign and link clicked is <http://www.marketxpander.com>" at 01:00 AM on Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday

Status : Draft

Cancel

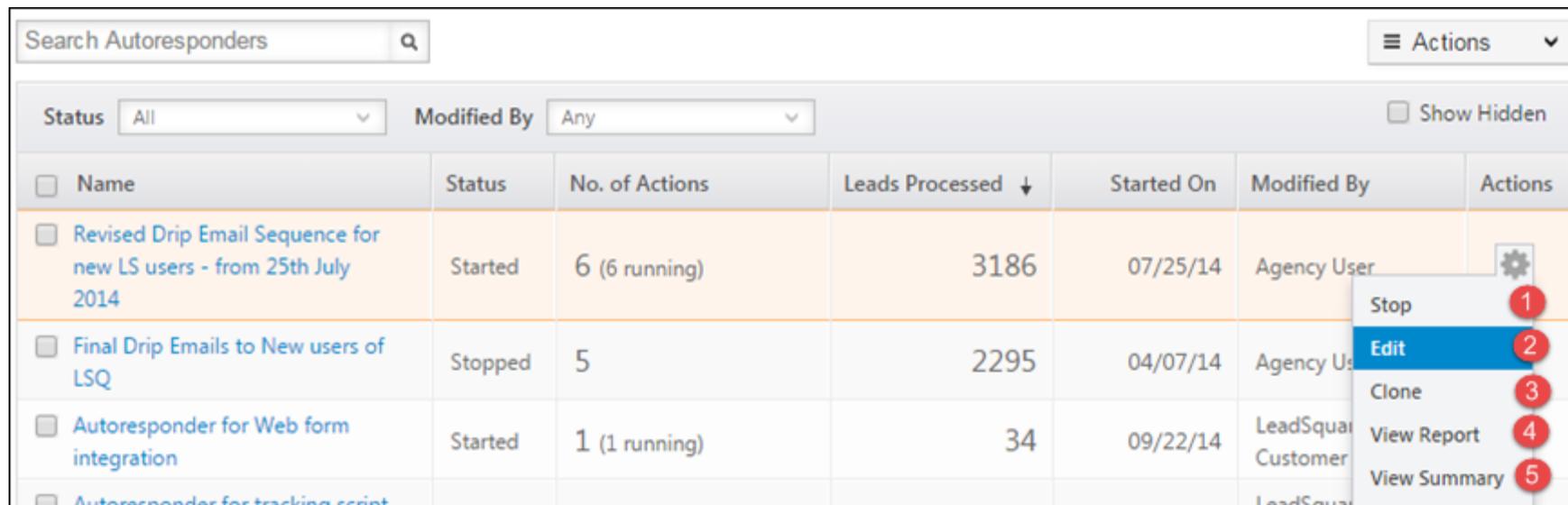
Exit

Back

Save and Start

Manage your Autoresponders

You can manage all your Autoresponders at Marketing -> Autoresponders.



The screenshot shows a web interface for managing autoresponders. At the top, there is a search bar labeled 'Search Autoresponders' and an 'Actions' dropdown menu. Below the search bar, there are filters for 'Status' (set to 'All') and 'Modified By' (set to 'Any'), along with a 'Show Hidden' checkbox. The main content is a table with columns: Name, Status, No. of Actions, Leads Processed, Started On, Modified By, and Actions. Three autoresponders are listed: 'Revised Drip Email Sequence for new LS users - from 25th July 2014', 'Final Drip Emails to New users of LSQ', and 'Autoresponder for Web form integration'. An actions menu is open over the first row, showing options: Stop (1), Edit (2), Clone (3), View Report (4), and View Summary (5).

<input type="checkbox"/>	Name	Status	No. of Actions	Leads Processed ↓	Started On	Modified By	Actions
<input type="checkbox"/>	Revised Drip Email Sequence for new LS users - from 25th July 2014	Started	6 (6 running)	3186	07/25/14	Agency User	
<input type="checkbox"/>	Final Drip Emails to New users of LSQ	Stopped	5	2295	04/07/14	Agency User	
<input type="checkbox"/>	Autoresponder for Web form integration	Started	1 (1 running)	34	09/22/14	LeadSquare Customer	
<input type="checkbox"/>	Autoresponder for tracking script					LeadSquare	

1	2	3	4	5
Stop the Autoresponder (with an option to stop all future triggered emails)	Edit: change the email content of one or more steps without stopping Autoresponder. Click here for more info.	Clone: Copy the Autoresponder	View Report: See the delivery & performance of each step of Autoresponder	View Summary: Check the summary of Autoresponder criteria, trigger and actions

Review Autoresponder Reports

Check Autoresponder report to find which steps are doing well/ not well.

Revised Drip Email Sequence for new LS users - from 25th July 2014

Date Range

Revised Drip Email Sequence for new LS users - from 25th July 2014. Updated the email content.

17903

Emails Sent

17903

Emails Delivered

No Action 67.85%

Open 32.15%

Click 2.85%

Report Spam 0.01%

Unsubscribed 0.47%



3186

Leads Processed

3146

Leads Received Emails

Engaged 53.75%

Not Engaged 46.25%



Created By :
Agency User

Last Modified On :
01/16/15

Actions

Email # 1

[\(View Email\)](#)

📌 Immediately after trigger

3166

Sent

42.61%

Opened

[1349 Emails]

7.01%

Clicked

[222 Emails]

0.38%

Unsubscribed

[12 Emails]

0%

Report Spam

[0 Emails]

Email # 2

[\(View Email\)](#)

📌 3 Days after trigger

3046

Sent

36.93%

Opened

[1125 Emails]

3.74%

Clicked

[114 Emails]

0.49%

Unsubscribed

[15 Emails]

0.03%

Report Spam

[1 Emails]

6- Manage Leads

Understand the Manage Leads page

“Manage Leads” page helps in conducting all Lead Management activities from capture till closure.

Navigate to [Leads -> Manage Leads](#) and check all options available.

Manage Leads

Search Leads

Collapse Panel

Lead Stage Lead Source Owner Date Range

<input type="checkbox"/> Lead Name	Lead Score	Lead Stage	Owner	Modified On ↓	Actions
<input type="checkbox"/> ● Karan Jain	5	Prospect	Demo User	26/12/14 01:38 PM	<input type="button" value="⚙"/>
<input type="checkbox"/> ● Paul Drucker	0	Prospect	Demo User	26/12/14 01:38 PM	<input type="button" value="⚙"/>
<input type="checkbox"/> ● John Smith	0	Prospect	Demo User	26/12/14 01:37 PM	<input type="button" value="⚙"/>

Show 1 - 3 of 3

Quick Filters

- Engaged Leads
- Leads who visited website in the last 7 days
- Leads with activity in last 7 days
- New Leads in last 7 days

Adding Leads using 'Quick Add Lead' form

There are multiple ways of Adding Lead manually. Quick Add Lead is the fastest one.

Navigate to [Leads -> Manage Leads](#) and click Quick Add Lead Button. Fill in the data and press save button.

The screenshot displays the 'Manage Leads' interface. At the top, there is a header 'Manage Leads' with a help icon and a refresh icon. Below the header is a dark blue bar with the text 'Add New Lead' and a close icon. The main form area contains several input fields: 'First Name', 'Last Name', 'Email', 'Phone Number', 'Website', 'Lead Source' (a dropdown menu), and 'Notes'. A red circle with the number '2' is placed over the 'Phone Number' field. To the right of the form is a sidebar with a 'Collapse Panel' button. The sidebar contains a list of buttons: 'Quick Add Lead' (highlighted with a red circle and the number '1'), 'Add New Lead', 'Add New Lead [NEW]', and 'Import Leads'. Below the buttons is a 'Quick Filters' section with a plus icon and a list of filter options: 'Engaged Leads', 'Leads who visited website in the last 7 days', 'Leads with activity in last 7 days', and 'New Leads in last 7 days'. At the bottom of the form, there are three buttons: 'Save and Add New' (highlighted with a red circle and the number '3'), 'Save and Close', and 'Cancel'.

Adding Leads using 'Add New Lead' form

Navigate to Leads -> Manage Leads and click Add New Lead or Add New Lead [NEW] button.

Actions

Collapse Panel

Last Activity All Time

Modified On ↓ Actions

26/12/14 01:38 PM	⚙
26/12/14 01:38 PM	⚙
26/12/14 01:37 PM	⚙

+ Quick Add Lead

+ Add New Lead **1**

+ Add New Lead [NEW]

Import Leads

Add New Lead **2**

Enter Data and Save in this popup form

Lead Details Additional Details

First Name Last Name

Email Phone Number

Add New Lead [?]

2 or Use this form "Add New Lead [NEW]"

Lead Details

Additional Details

Lead Details

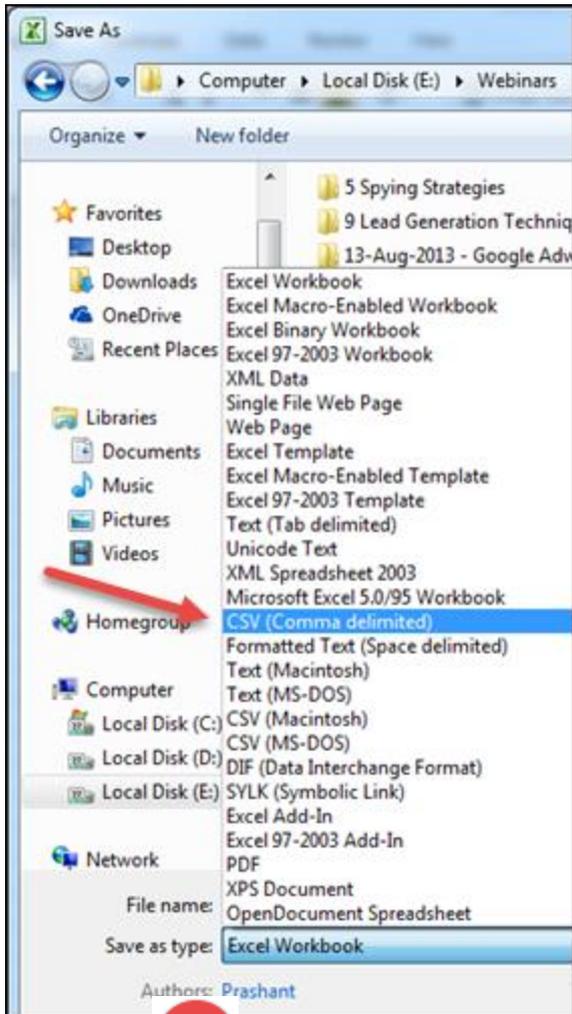
First Name Last Name

Email Phone Number

Company Website

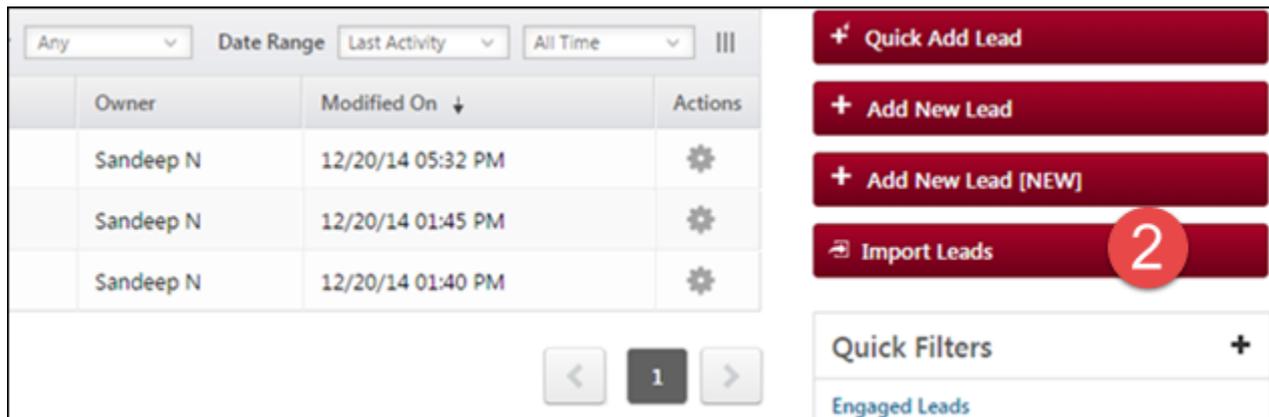
Importing Leads from Excel Spreadsheet

1. Save Excel as a [CSV](#) file.
2. Navigate to [Leads -> Manage Leads](#) and click Import Leads and follow instructions



1

Save Excel as CSV



Additional Help

[How can I import leads to LeadSquared?](#)

[Help Video – Importing leads into LeadSquared](#)

Customize Lead Grid

You can decide which lead fields you want to see on the Manage Leads Page. Click on  to select the lead fields.

Manage Leads ? ▶

Search Leads

Lead Stage Lead Source Owner Date Range 

<input type="checkbox"/> Lead Name	Lead Score	Lead Stage	Owner	Modified On ↓	Actions
<input type="checkbox"/> ● Karan Jain	5	Prospect	Demo User	26/12/14 01:38 PM	
<input type="checkbox"/> ● Paul Drucker	0	Prospect	Demo User	26/12/14 01:38 PM	
<input type="checkbox"/> ● John Smith	0	Prospect	Demo User	26/12/14 01:37 PM	

Simple Search for Leads

You can search for leads based on their name, email address, company name etc. Check with your LeadSquared Admin on what fields simple search is possible.

Manage Leads ? ▶

Search Leads

1 results found **John** ×

Lead Stage Lead Source Owner Date Range ☰

<input type="checkbox"/> Lead Name	Lead Score	Lead Stage	Owner	Modified On ↓	Actions
<input type="checkbox"/> ● John Smith	0	Prospect	Demo User	26/12/14 01:37 PM	<input type="button" value="⚙️"/>

Show **1 - 1 of 1**

Filter Leads based on Lead Stage, Owner, Source and Date Range

You can also look at lead data based on one or more search filters - Lead Stage, Lead Source, Owner, Date Range.

Manage Leads ? ▶

Search Leads 🔍 Advanced Search 🔍 Actions ▾

Lead Stage All ▾ Lead Source All ▾ Owner Any ▾ Date Range Last Activity ▾ All Time ▾ |||

<input type="checkbox"/> Lead Name	Lead Score	Lead Stage	Owner	Modified On ↓	Actions
<input type="checkbox"/> ● Karan .	5	Prospect	Demo User	26/12/14 01:38 PM	⚙️
<input type="checkbox"/> ● Paul D	0	Prospect	Demo User	26/12/14 01:38 PM	⚙️
<input type="checkbox"/> ● John Smith	0	Prospect	Demo User	26/12/14 01:37 PM	⚙️

Lead Stage dropdown menu:
All
Prospect
Opportunity
Customer
Disqualified
Invalid

Show 25 ▾ 1 - 3 of 3 < 1 >

Using Advanced Search to find leads

You can combine multiple lead fields and activity data to do fine grained segmentation of Leads. Click "Advanced Search" button.

The screenshot shows the 'Manage Leads' interface. At the top, there is a search bar with 'Search Leads' and a magnifying glass icon. To its right is the 'Advanced Search' button, which is highlighted with a red box. Below the search bar, there are filters for 'Lead Stage' (set to 'All') and 'Lead Source' (set to 'All'). There are also checkboxes for 'Lead Name' and 'Lead Score'. The 'Advanced Search' dialog box is open, showing the 'Select Search Criteria' section with a 'Type to Search' dropdown, an 'Is' dropdown, and a 'Select Activity' dropdown. Below these are '+ Add' and 'Reset' buttons. The '+ Add' button is highlighted with a red circle labeled '2'. To the right of the dialog box, there are radio buttons for 'Any Criteria' and 'All Criteria', with 'All Criteria' selected. Below this, there are three criteria listed: 'Activity of the lead is Had a Phone Conversation', 'and Lead Stage is "Opportunity"', and 'and Created On is this month'. At the bottom of the dialog box, there are three buttons: 'Find Leads' (highlighted with a red circle labeled '3'), 'Cancel', and 'Save as Quick Filter'.

Click here for more help on Advanced Search

Create Quick Filters for your most frequent search queries

If you use few search queries frequently, then you may save them as Quick Filters. Press **+** icon on Quick Filters widget in Manage Leads page, specify search query and save filter.

The image shows a user interface for managing leads. On the left, a 'Quick Filters' widget is visible, containing a list of filters: 'Engaged Leads', 'Leads who visited website in the last 7 days', 'Leads with activity in last 7 days', and 'New Leads in last 7 days'. A red arrow points to a '+' icon in the top right corner of this widget. To the right, the 'Advanced Search' modal is open. It features a 'Select Search Criteria' section with three dropdown menus: 'Lead Activity', 'is', and 'Select Activity'. Below these is a '+ Add' button (marked with a red circle '2') and a 'Reset' button. The search results area shows 'Search for Leads that Match' with radio buttons for 'Any Criteria' and 'All Criteria' (selected). Below this, a search query is displayed: 'Lead Source is Organic Search' followed by 'and Lead Score is greater than or equal to "20"'. A red callout bubble (marked with a red circle '1') points to the 'is' dropdown menu with the text 'Specify Search query'. At the bottom of the modal, there are three buttons: 'Find Leads', 'Cancel', and 'Save as Quick Filter' (marked with a red circle '3').

Quick Filters

- Engaged Leads
- Leads who visited website in the last 7 days
- Leads with activity in last 7 days
- New Leads in last 7 days

Advanced Search

Select Search Criteria

Lead Activity is Select Activity

+ Add Reset

Search for Leads that Match Any Criteria All Criteria

Lead Source is Organic Search and Lead Score is greater than or equal to "20"

Find Leads Cancel Save as Quick Filter

[Click here for more help on Quick Filters](#)

Working on Leads

A number of actions can be performed on each lead.

Lead Name	Lead Score	Lead Stage	Owner	Modified On ↓	Actions
<input type="checkbox"/> Karan Jain	5	Prospect	Demo User	26/12/14 01:38 PM	<ul style="list-style-type: none"> 1 Edit 2 Edit [NEW] 3 New Sales Activity 4 Add Task 5 Add Activity 6 Send Email 7 Change Owner 8 Change Stage 9 Add to List 10 Delete 11 Send SMS
<input type="checkbox"/> Paul Drucker	0	Prospect	Demo User	26/12/14 01:38 PM	
<input type="checkbox"/> John Smith	0	Prospect	Demo User	26/12/14 01:37 PM	

1 & 2	3	4	5	6	7	8	9	10	11
Edit Lead Record	Post a revenue activity like New Order or Booking;	Create a future task on the lead	Add an activity (like personal meeting) on the lead	Send one-to-one Email to Lead	Assign lead to someone else	Change the stage of Lead	Add Lead to a static list	Delete the lead (your admin can disable this)	Send SMS (available if SMS feature is enabled)

Working on Multiple Leads

You can perform action on multiple leads simultaneously. Select multiple Leads and use Actions menu.

The screenshot shows a CRM interface with a search bar, filters, and a table of leads. An 'Actions' dropdown menu is open, listing eight actions with red numbered circles next to them.

Lead Name	Lead Score	Lead Stage	Owner	Modified On
<input checked="" type="checkbox"/> <input type="radio"/> Karan Jain	5	Prospect	Demo User	26/12/14 01:38 PM
<input checked="" type="checkbox"/> <input type="radio"/> Paul Drucker	0	Prospect	Demo User	26/12/14 01:38 PM
<input checked="" type="checkbox"/> <input type="radio"/> John Smith	0	Prospect	Demo User	26/12/14 01:37 PM

- 1 Bulk Update
- 2 Send Email
- 3 Add to List
- 4 Add Activity
- 5 Change Owner
- 6 Delete
- 7 Reset all Filters
- 8 Send SMS

1	2	3	4	5	6	7	8
Update one field of all selected lead records with a new value	Send one-to-one emails to multiple leads in one go	Add selected Leads to a static list	Add an activity (like personal meeting) on all the selected leads	Assign all selected leads to new owner	Delete selected leads (may not be available if your admin has disabled it)	Reset all current search filters on Lead Grid	Send SMS to selected leads (available if SMS feature is enabled)

Manage Tasks & Reminder

Manage all your tasks (created by you or assigned to you by your manager) in Task & Reminder Page. Click  on top menu to access it.

DASHBOARD ▾ CONTENT ▾ MARKETING ▾ LEADS ▾ APPS ▾    MY ACCOUNT ▾ HELP ▾

Tasks [?]

Search Tasks

Actions ▾

Due Today ▾

Status ▾

Pending ▾

Filter by Owner

Maria Susan, LeadSquar... ▾

<input type="checkbox"/> Subject	Status	Due Date ↑	Reminder	Created By	Actions
<input type="checkbox"/> Lead Follow Up: 	Overdue	15/09/14 11:00 AM	15 min	Maria Susan, Lead	
<input type="checkbox"/> Lead Follow Up: 	Overdue	23/09/14 03:00 PM	15 min	Mari Lead	
<input type="checkbox"/> Lead Follow Up: 	Overdue	13/10/14	15 min	Mari	

Edit
Mark Complete
Delete

Manage Lead Activities

On Manage Leads page, click on a Lead Record to see all Lead Activities

The screenshot displays a CRM interface for a lead named Artem. The left sidebar shows lead details: name (Artem), address (Mira av. 105/1, Moscow, Russia), lead stage (FT2), lead score (38), and engagement status (Engaged, with a red circle containing 36). Below this, lead source (Organic Search), lead age (0 Days), and lead owner (Nilesh Patel) are listed. A blue button labeled 'Activity History' with a right arrow is at the bottom of the sidebar.

The main content area features a toolbar with icons for navigation, a checklist, a document, a red circle with a white dollar sign, and a green box with '1' and the text 'TO-DO Tasks for this Lead'. A blue button labeled 'Lead Actions' with a dropdown arrow is on the right. Below the toolbar is the 'Activity History' section, which includes a dropdown for 'Notable Activity Type' (set to 'All') and a 'Time' filter (set to 'Last 30 Days').

A red speech bubble points to the activity history table with the text 'Activity History of Lead Record'. The table lists activities for December 2014:

Date	Activity	Score Change
26 03:11 PM	Lead Stage changed from FT1 to FT2 by Automated Signup.	+0
26 03:10 PM	Opened email sent by LeadSquared Support <support@leadsquared.com> with subject LeadSquared Account Setup and clicked on https://signup.leadsquared.com/CompleteSignup/Index/bd4fce39-1173-4833-bbfa-ba7f2e83215e link.	+2
26 03:10 PM	Opened email sent by LeadSquared Support <support@leadsquared.com> with subject LeadSquared Account Setup.	+1
26 03:09 PM	Lead Stage changed from FT0 to FT1 by Automated Signup.	+0

7-Manage Lists

What is a list?

Lists are group or collection of Leads. These Leads can be together because they match specified criteria or because a user chose to put them together.

You can create two types of lists in LeadSquared – Static & Dynamic

- Static List has fixed number of Leads.
- The list can only be changed by manually deleting, adding or importing Leads

Static List



- Dynamic List is a set of Leads defined by a specific criteria.
- The criteria could be attributes or activities of Leads.
- The number of leads in the list will change based on which leads meet the criteria specified in the list definition

Dynamic List



- ✓ Leads can be part of multiple Lists
- ✓ All leads will show up in Manage Leads page irrespective of them being part of one or more lists
- ✓ Lead removed from a list does not delete the lead
- ✓ Dynamic List can be converted to static but static can't be converted to dynamic

Understand the Manage Lists page

Navigate to [Leads -> Manage Lists](#) page to work on all your lists.

Manage Lists ?

Search Lead Lists

List Type All Created By Prashant Singh, LeadSq... Show Hidden Actions

<input type="checkbox"/>	List Name	Engagement Index	Description	Member Count	List Type	Created by (date) ↓	Modified by (date)	Actions
<input type="checkbox"/>	<input type="checkbox"/> Anup - FT2 - Follow up	100%	Anup - FT2 - Follow up	5	Static	Prashant Singh, Lead Squar... 17/12/14	Prashant Singh, Lea dSquar... 17/12/14	
<input type="checkbox"/>	<input type="checkbox"/> List of ppl below 30 L	25%	List of ppl below 30 L	4	Static	Prashant Singh, Lead Squar... 28/11/14	Prashant Singh, Lea dSquar... 28/11/14	
<input type="checkbox"/>	<input type="checkbox"/> SMS Nurturing List	0%	SMS Nurturing List	0	Static	Prashant Singh, Lead Squar... 12/10/14	Prashant Singh, Lea dSquar... 12/10/14	

[+ Create New List](#)

[↩ Import Leads](#)

Help?

What is Static List?
Static List has fixed number of Leads. The list can only be changed by manually deleting, adding or importing Leads.

What is Dynamic List?
Dynamic List is a set of Leads defined by a specific criteria. The criteria could be attributes or activities of Leads. The number of leads in the list will change based on which leads meet the criteria specified in the list definition.

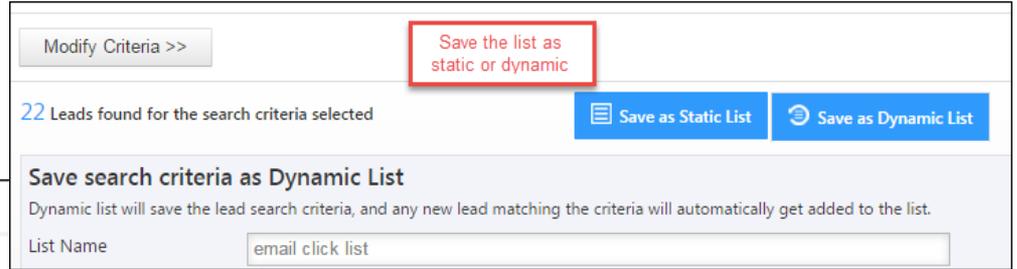
Create your own Lists

Navigate to [Leads -> Manage Lists](#) page and click on "Create New List" button



Actions ▾ + Create New List

Show Hidden Import Leads



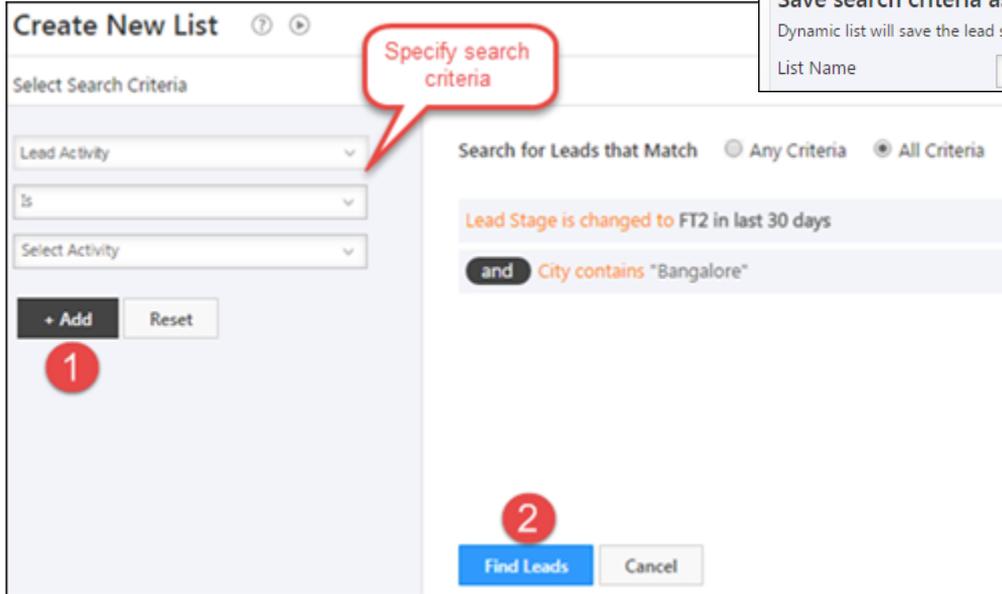
Modify Criteria >> Save the list as static or dynamic

22 Leads found for the search criteria selected Save as Static List Save as Dynamic List

Save search criteria as Dynamic List

Dynamic list will save the lead search criteria, and any new lead matching the criteria will automatically get added to the list.

List Name email click list



Create New List

Select Search Criteria

Lead Activity is Select Activity

+ Add Reset

1

Specify search criteria

Search for Leads that Match Any Criteria All Criteria

Lead Stage is changed to FT2 in last 30 days

and City contains "Bangalore"

2

Find Leads Cancel

- ✓ Specify the search criteria to filter leads
- ✓ You can combine multiple criteria
- ✓ Click find leads to see matching leads
- ✓ Save the result as static or dynamic list

Send Email/SMS to all members of List

On Manage List Page, you can find option of sending Email and SMS to entire list under the actions options .

- Send Email option is available to all users
- Send SMS option is available only for the customers who have SMS feature enabled

Manage Lists ?

Search Lead Lists Q ≡ Actions ▼

List Type Static ▼ Created By Any ▼ Show Hidden

<input type="checkbox"/>	List Name	Engagement Index	Description	Member Count	List Type	Created by (date) ↓	Modified by (date)	Actions
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Webinar - 13th Feb - Responsiv...	100%	Webinar leads (EST)	13	Static	Shibani Roy, LeadSquared 06/02/15	Shibani Roy, LeadSquared 06/02/15	 Edit Delete Hide Send Email Send SMS
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Webinar - 13th Feb - Responsiv...	77%	Webinar Leads - IST	46	Static	Shibani Roy, LeadSquared 06/02/15	Shibani Roy, LeadSquared 06/02/15	
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Dharmendra-Market Research Lis...	0%		2	Static	Dharmendra Malviya 03/02/15	Dharmendra Malviya 03/02/15	

Explore inside Static List

Navigate to [Leads -> Manage Lists](#) page click on any static list. You will be able to see all members of the list and perform actions on leads or list.

List Details

[← Back](#)

Anup - FT2 - Follow up

Anup - FT2 - Follow up

Static List 5 Total Leads

Created By : Prashant Singh, LeadSquared
Created On : 17/12/14 12:16:23 PM
Modified By : Prashant Singh, LeadSquared
Modified On : 17/12/14 12:16:23 PM

Overall Eng 60

Search Leads

Lead Stage All Date Range Last Activity All Time

<input type="checkbox"/>	Lead Name	Engagement Score	Last Activity Date	Last Activity	Owner	City	Lead Source	Actions
<input checked="" type="checkbox"/>		24	23/12/14 07:26 PM	Topbar Viewed	Anup Krishnan	brno	Organic Search	
<input type="checkbox"/>		0	01/12/14 11:39 PM	Left a Voice Mail or Call Not Answered	Anup Krishnan	Cedar Rapids	Organic Search	

Actions available on List

- Quick Add Lead
- Add New Lead
- Edit
- Add More Leads
- Delete
- Delete All Leads
- Send SMS

Leads in the list

Action options on Leads

Explore inside Dynamic List

Navigate to [Leads -> Manage Lists](#) page click on any dynamic list. You will be able to see all members of the list and perform actions on leads or list.

List Details

← Back

leads visit on website

Dynamic List **30** Total Leads

Created By : Dimple Razdan
Created On : 20/12/14 02:04:37 AM
Modified By : Dimple Razdan
Modified On : 23/12/14 11:36:56 PM

93 Overall Engagement Index

Search Leads

Lead Stage: All | Date Range: Last Activity | All Time

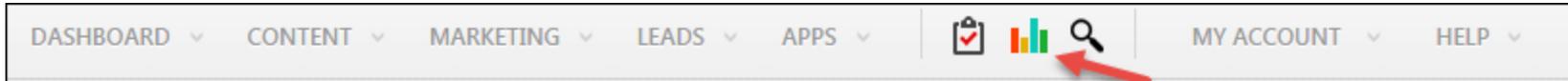
Lead Name	Engagement Score	Last Activity Date	Last Activity	Owner	Location	Ad Type	Actions
<input type="checkbox"/> [Red Dot] [Blurred]	15	27/12/14 01:54 AM	Converted to Lead	Nilesh Patel	cairo	SlideShare	[Gear]
<input type="checkbox"/> [Red Dot] [Blurred]	97	28/12/14 01:30 AM	Email Link Clicked	Subha Devanathan, LeadSquared	Velachery, Chennai	Pay per Click Ads	[Gear]

Note: the action options on dynamic list (only on list, not on leads) are different from static list.

8- Reports & Dashboard

Check Marketing Reports

Check Sales Reports by clicking the Analytics icon  on top menu.



Categories

Click on any report group
to find reports inside

Lead Insights (7)

These reports give you insight on your lead data across various attributes and time periods

User Activity and Tasks (5)

These reports help you analyze the effort and results of your users across various sales and marketing metrics

Telephony and SMS (4)

These give you statistics and reports on your telephony and SMS usage and trends

Website and Landing Pages (3)

Analyze your landing pages, forms and website for trends, patterns, results and improvements

Emails (3)

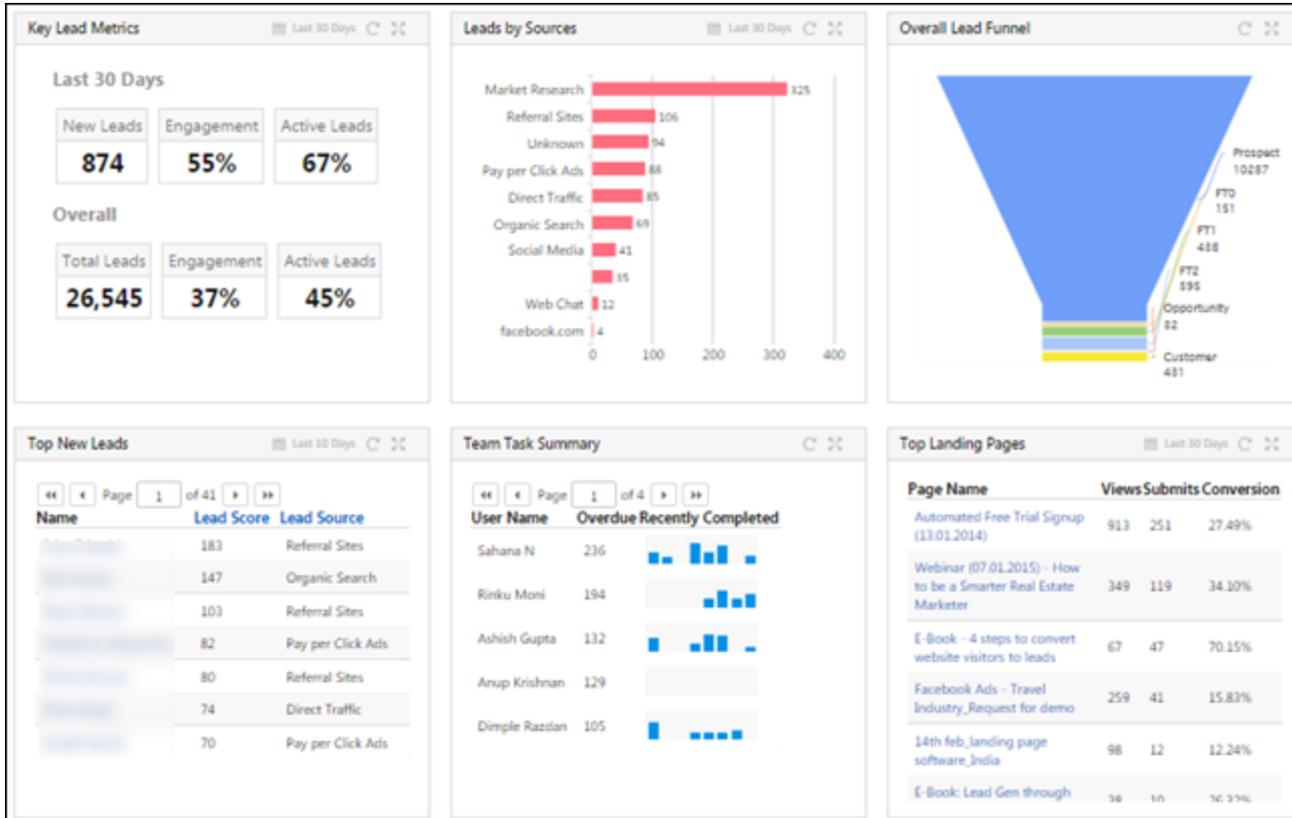
Everything about your emails - Campaigns, Automated Emails and one-one emails

Sales and Revenue (1)

Revenue performance analytics - find revenue generated by User, Source, Geography and other parameters

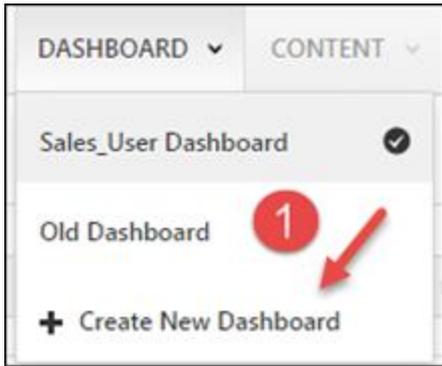
Review Default Dashboard

Click "Dashboard" on top menu to check your system created default dashboard



Customize Your Dashboard

You can create your own Dashboard of Reports, Tasks and Activities. Click "Dashboard" on top menu and select "Create New Dashboard"

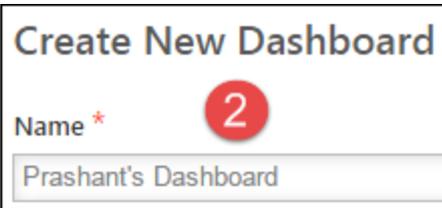


DASHBOARD ▾ CONTENT ▾

Sales_User Dashboard ✓

Old Dashboard **1**

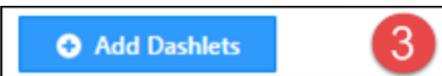
+ Create New Dashboard



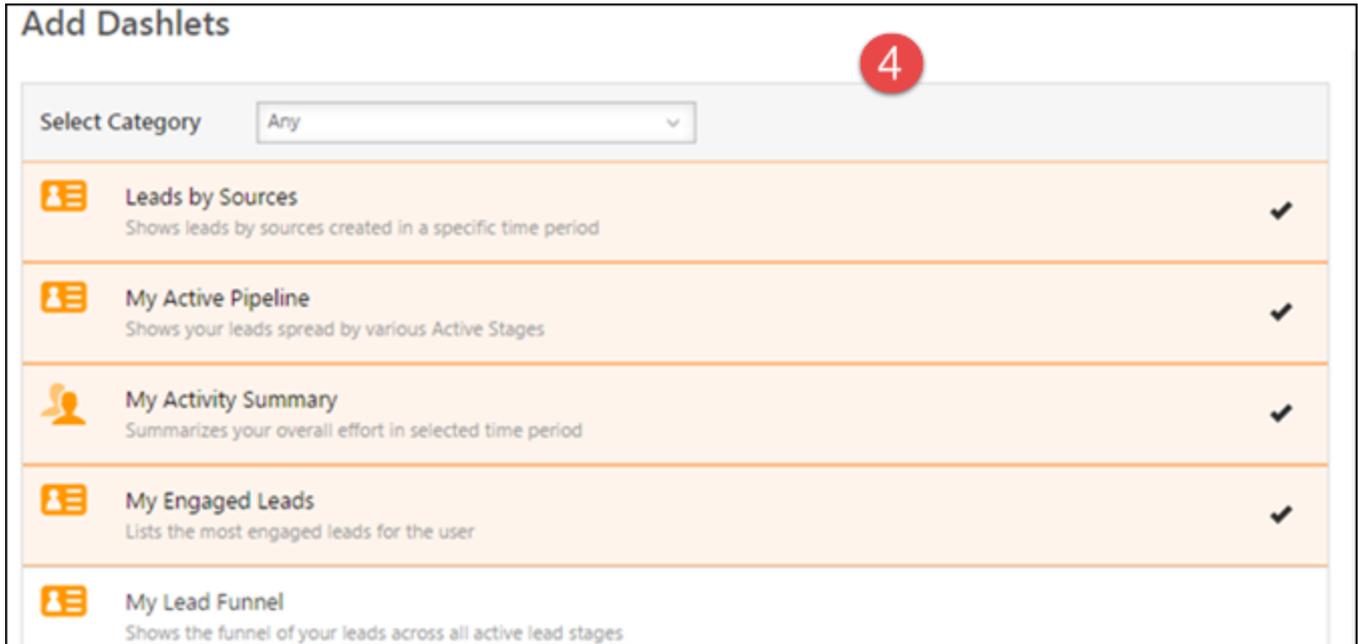
Create New Dashboard

Name * **2**

Prashant's Dashboard



+ Add Dashlets **3**



Add Dashlets **4**

Select Category

	Leads by Sources Shows leads by sources created in a specific time period	✓
	My Active Pipeline Shows your leads spread by various Active Stages	✓
	My Activity Summary Summarizes your overall effort in selected time period	✓
	My Engaged Leads Lists the most engaged leads for the user	✓
	My Lead Funnel Shows the funnel of your leads across all active lead stages	

Make your custom dashboard as default

Check your new dashboard and make it default if you want.

Prashant's Dashboard [Make this dashboard as default](#) [Add Dashlets](#)

The dashboard contains the following components:

- Leads by Sources** (Last 30 Days): A horizontal bar chart showing 1 lead from Social Media, Organic Search, and Unknown.
- My Active Pipeline**: A table showing 3 Prospect leads with ~0.00% engagement.
- My Activity Summary** (Last 30 Days): A list of activities including 3 Leads Added, 3 Leads Updated, 1 Activity Posted, 0 Tasks Completed, and 0 Tasks Overdue.
- My Engaged Leads**
- My Lead Funnel**

Stage	# of Leads	Engagement
Prospect	3	~ 0.00%

Activity	Count
Leads Added	3
Leads Updated	3
Activities Posted	1
Tasks Completed	0
Tasks Overdue	0

**You are good to Go.
Get Started!**

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