
leadsquared
Account Management

Learning Objective

In this module, we will…

- How to categorize business relationships with different account types
  - Setup different account types like customer, partner, etc.
  - Adding accounts in a different account types
  - View & manage accounts
  - Know what stages accounts are in
- Group leads using accounts
- Add leads to accounts
- Account based sales group permissions
- Account based automations

Account Management

Introduction

What is an Account and why we need it?

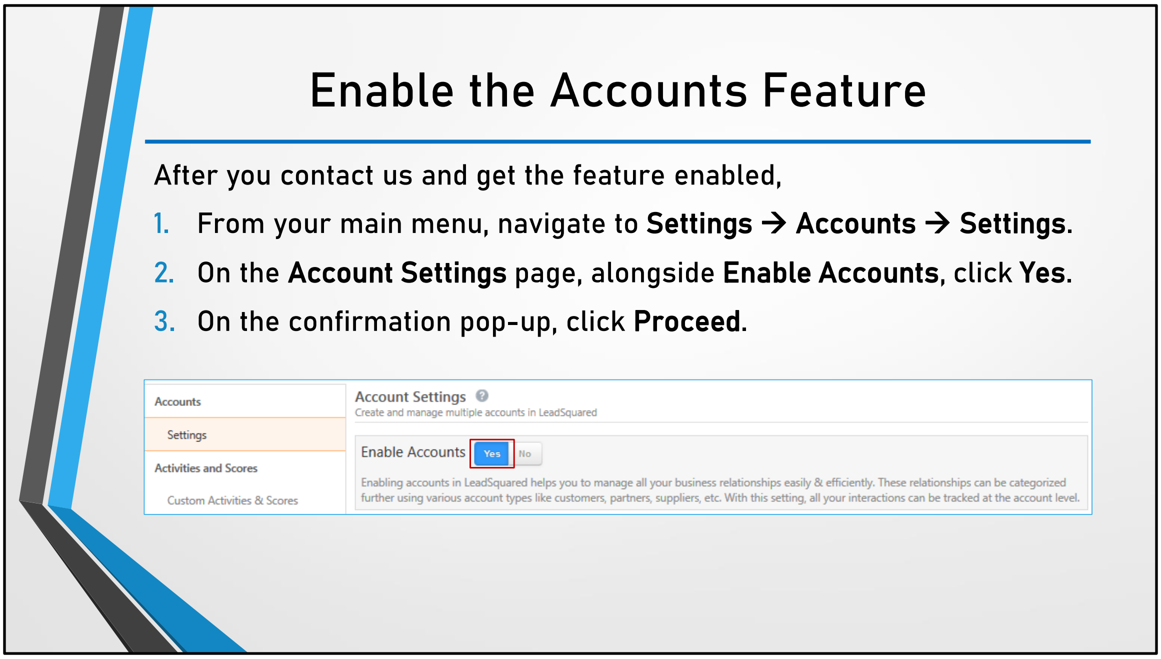
- Account represents an individual customer account, organization or partner involved with business.
- The accounts feature lets you manage all your B2B relationships through LeadSquared.
- Imagine a business selling their different offerings to Colleges, Private firms, Govt. firms either directly or via Partners, Suppliers and/or Agents.

Create accounts for all your partners, vendors, third-party services, etc., store all the data you need (account details, account owners, stages, etc.). Manage your leads under these different accounts.

You can organize all these different organizations in different account types. Accounts created under respective account types can then have leads assigned to them. For example, In ABC College you as a business might be interacting with 5 different people to finalize a deal. These 5 individuals can be created as leads assigned to ABC account under Account Type: College.

Similarly, you are selling your offerings via XYZ Partner who has 3 employees assigned to sell your products. You can create these 3 individuals as leads and assign them to XYZ account under Account Type: Partners.

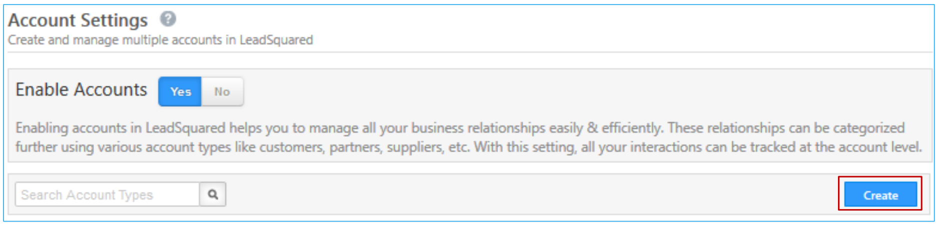
Configuring Account

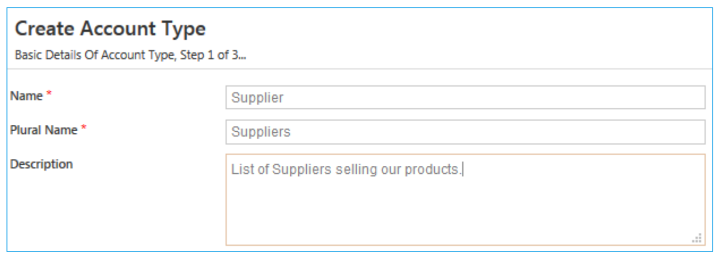


Pre-requisite:
The accounts feature is not available by default. To get it enabled, contact us at support@leadsquared.com.

Note: Once enabled, you cannot disable the accounts feature.

Create and Configure Account Types



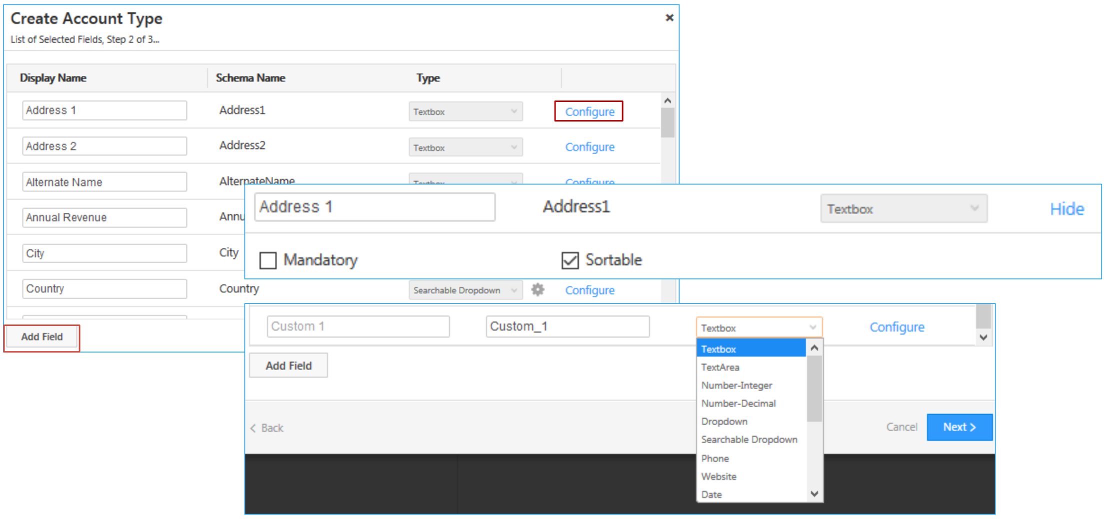


You'll see 2 account types available by default – Customers and Partners. You can't delete the Customers account type, but you can rename and customize it.

To create a new account type –

1. Click **Create**.
2. Give the account type a **Name**, **Plural Name** and **Description**, then click **Next**.

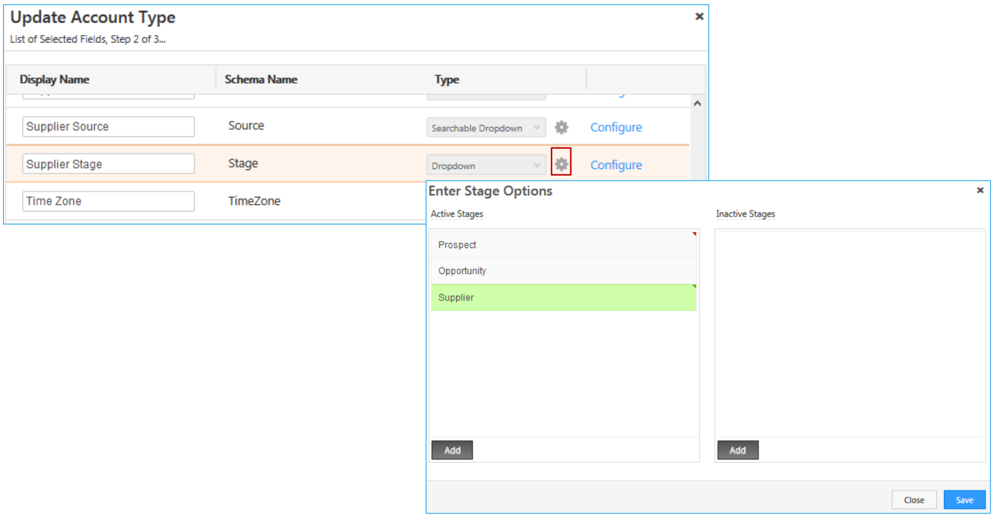
Create and Configure Account Types: Account Fields



Now configure the account type fields.

- You can change the **Display Name** of any field.
- To make more changes to an existing field, click **Configure**. You can make the field **Mandatory** and/or **Sortable** by clicking the respective checkboxes.
- To add a custom field, click **Add Field**. Add a **Name**, **Schema Name**, and configure a **Type** for the custom field. If you configure the Type as Dropdown/Searchable Dropdown/Multiselect Dropdown* click the settingswheel that appears alongside and type in the dropdown options. Click the delete icon if you wish to remove the custom field.
- Click **Next**.

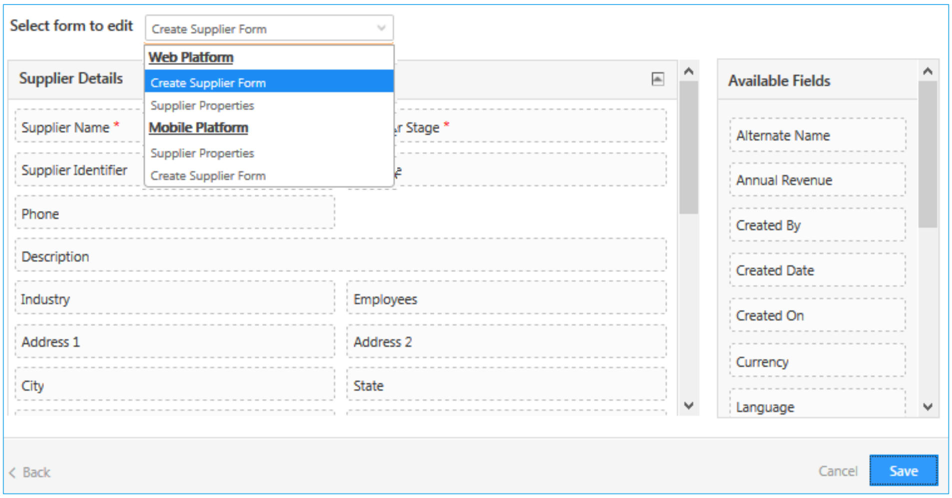
Create and Configure Account Types: Account Stage



Note: While configuring the fields for an account type, be sure to customize the **Stage** field to your liking. Click the settings icon alongside the field

Then add/edit/delete active and inactive stages for the account type.

Create and Configure Account Types: Account Forms



Finally, customize the account creation form.

- Drag and drop fields from the **Available Fields** column into the form sections.
- You can also edit and delete sections by hovering your cursor over the section header and clicking the respective icons.
- Drag and drop fields within a form section to display them in the order you like.
- To add a new form section, scroll down and click **Add Section.**

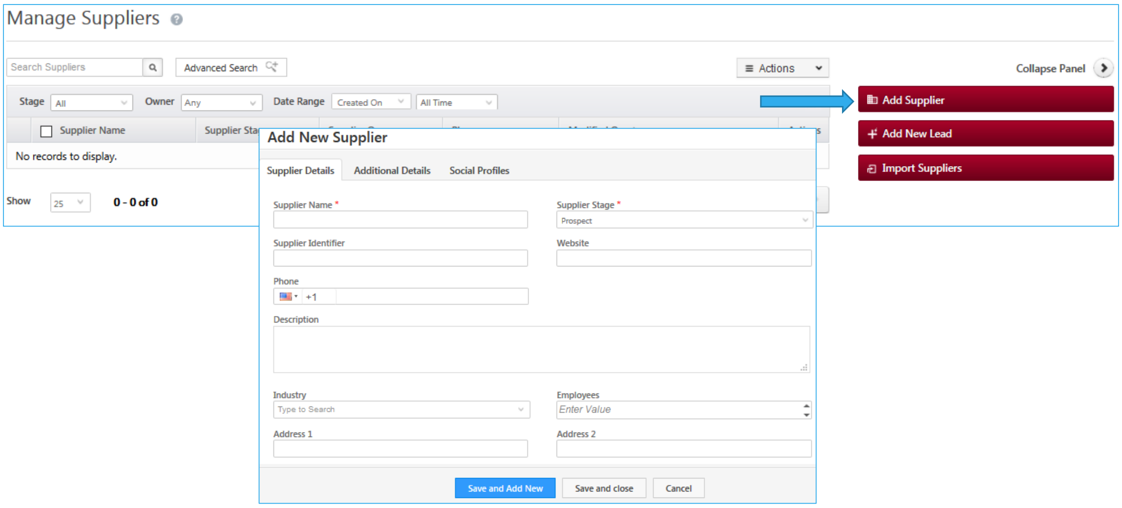
You can also create dependent drop-down fields. The process is the same for lead and activity dependent drop-downs.
You can also customize other forms from here.

Click **Save**.

Once you've created an account type, it'll show up on your main menu under **Leads → Manage Accounts**

Add or Import Account

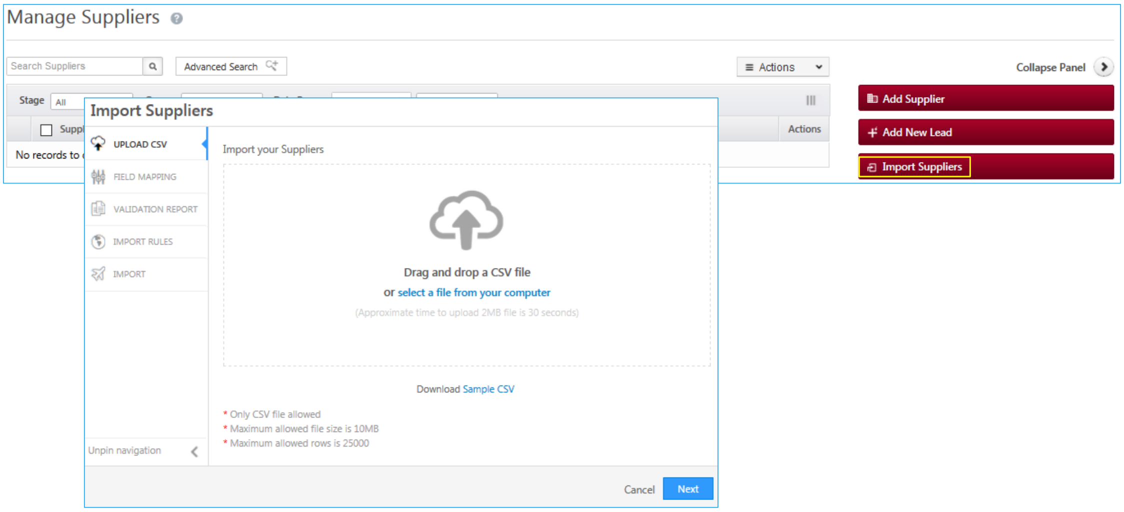
Add an Account



Following are the steps to add accounts under any of the account types you created –

1. Navigate to **Leads → Manage Accounts** and click the account type you want to add an account under.
2. On the **Manage Accounts** page, click Add <Account Type Name>.
3. Fill in all mandatory fields in the add account type form.
4. Click **Save and Add New** to create the next account or click **Save and Close** to proceed.

Import Accounts from CSV



You can import accounts to LeadSquared through a CSV* file. Here are some things you need to consider before beginning the import process

- **You can only import accounts pertaining to one account type (e.g., colleges, partners, vendors, etc.)**.
  For example, you can import multiple entries of a ‘College’ account type activity, but you can’t import both ‘College’ and ‘Vendor’ account types with one CSV file.
- How the fields in your CSV will match the fields of that account type. You’ll have to do the mapping after uploading the file.
- The **Account Name field is mandatory**. You must include it in the CSV file you upload

*Max file size allowed – 10 MB. Max rows allowed 25000

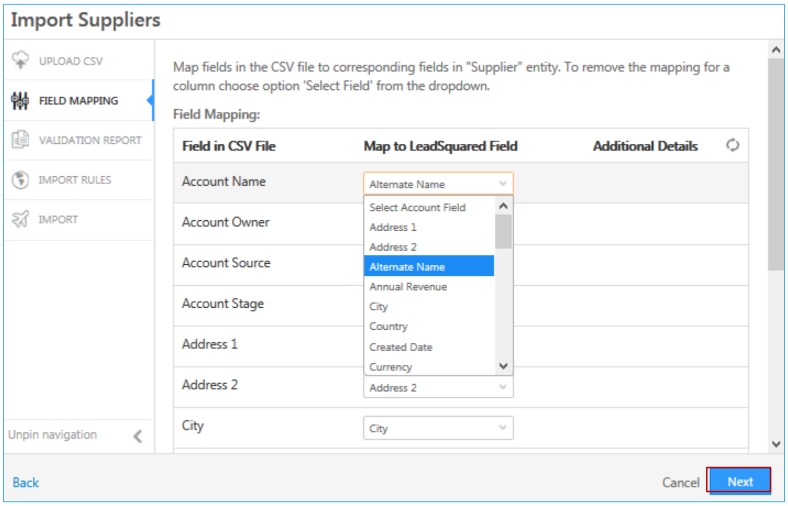
Steps to Import the Accounts:

1. Click on the **Import <Account type name>** button. For example: Import Suppliers.
2. On the **Import Account** wizard, either click the **select a file from your computer** link or directly drag and drop the CSV file into the area demarcated by the dotted

line.

3. Once the file has been uploaded, click **Next**.

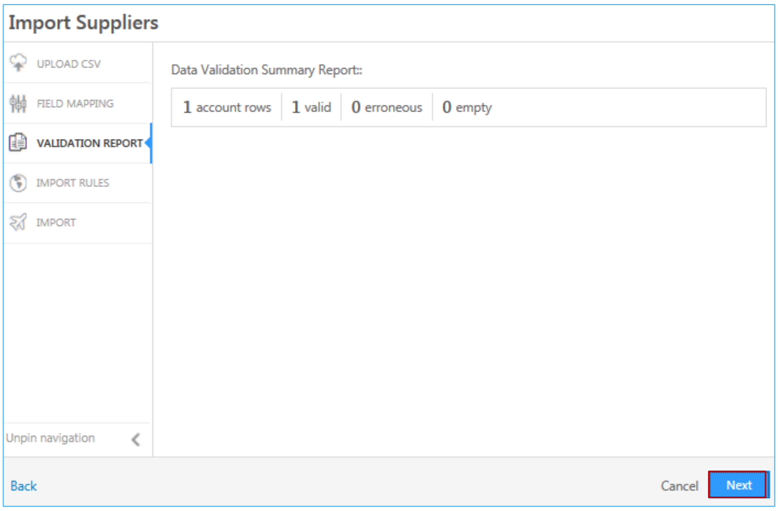
Import Accounts : Field Mapping



Map the CSV File Columns to the Account Type Fields –

1. Map the fields in the CSV file to the account type fields. Choose the appropriate field in the CSV that matches the identifiers in the account type fields (For example, College Name, College Owner, College Source, etc.).
2. Click **Next** when you're done.

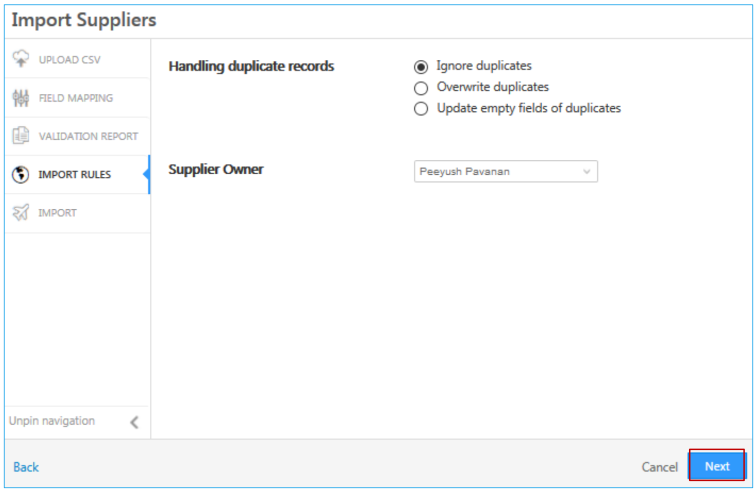
Import Accounts : Review the Validation



Review the Validation Report

1. The validation report will show you errors in your mapping configurations. You can –
2. Fix these errors and re-upload the CSV
   or
3. Ignore the errors and continue. If you do so, accounts won't be created for the rows which contained errors.

Import Account : Import Rules



Set Import Rules: Set import rules on how you want to handle duplicates –

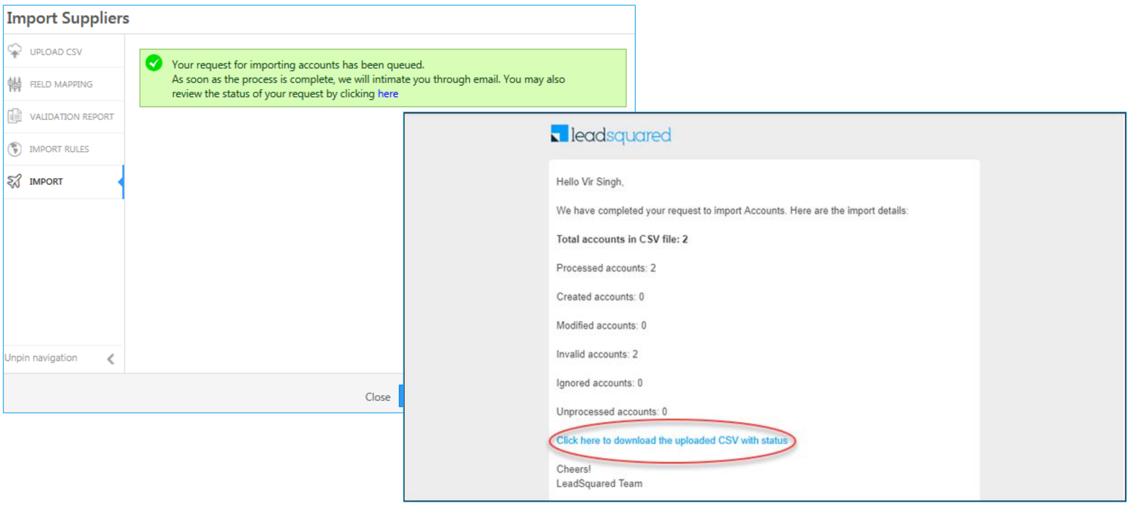
- **Ignore duplicates**
  If you select this option, duplicate records will **not** be imported. This is the default option that is pre-selected.
- **Overwrite duplicates**
  If you select this option, the CSV file data will overwrite the data in your LeadSquared account.
- **Update empty fields of duplicates**
  With this option, only empty fields of the duplicate records in LeadSquared will be updated with the data in the CSV file.

You can also set the default owner –

- If the account specified in your CSV is missing an owner, the selected user will be assigned as the account owner.
- **It won't be** overridden if you've mentioned an account owner in your CSV file (for example, that user X is the account owner for account A1).

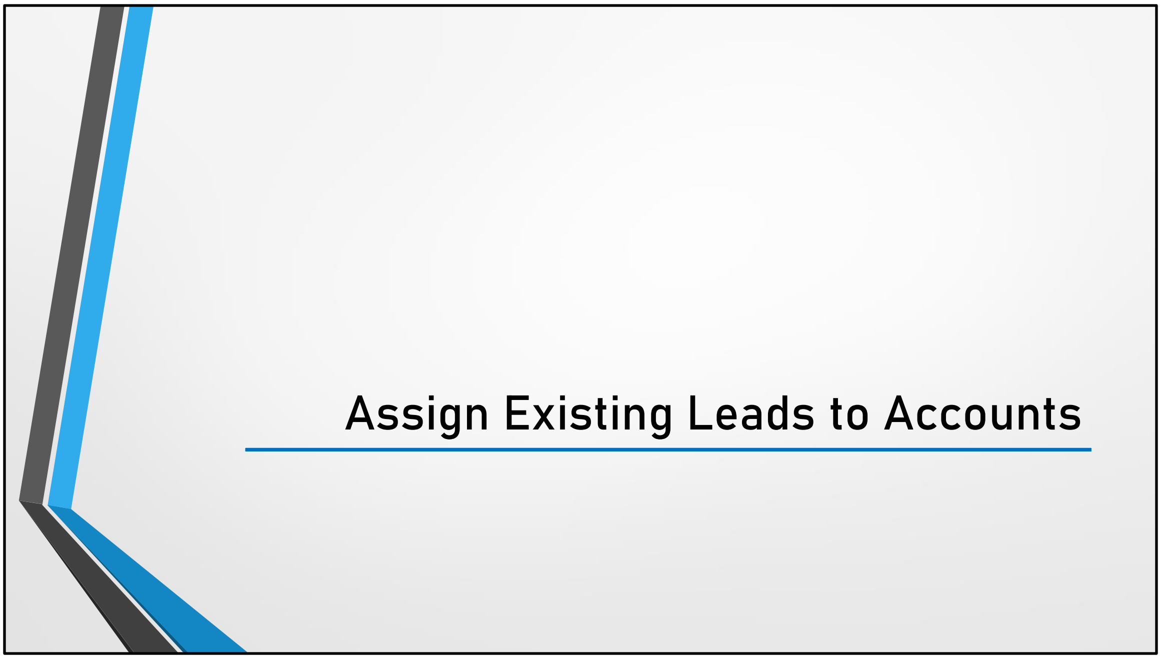
Click **Next** when you're finished.

Import Accounts : Check the Status



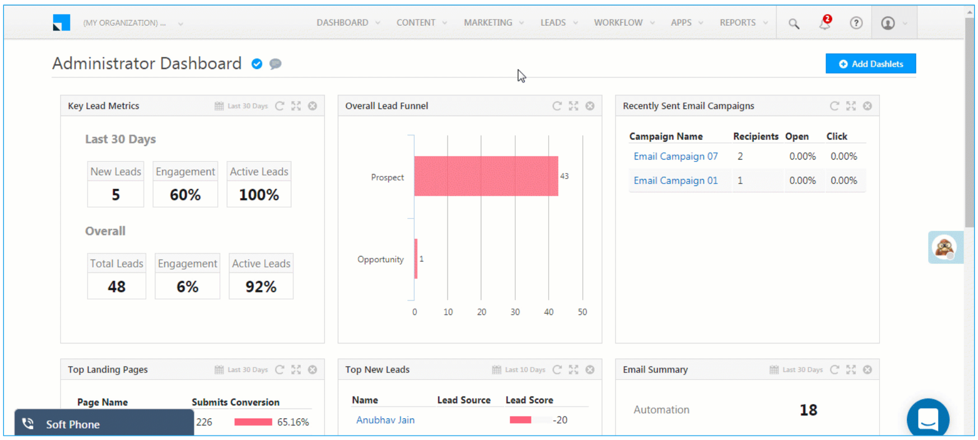
Check the Status of Your Import

Your import request is now successfully queued. Click the link shown below to view the status of the import. You'll also be notified by email once the import is complete. You can now choose to import another file or proceed to the Manage Accounts page


Assign Existing Leads to Accounts

Assign Existing Leads to Accounts

- The quickest way to assign leads to an account is to use the bulk update feature

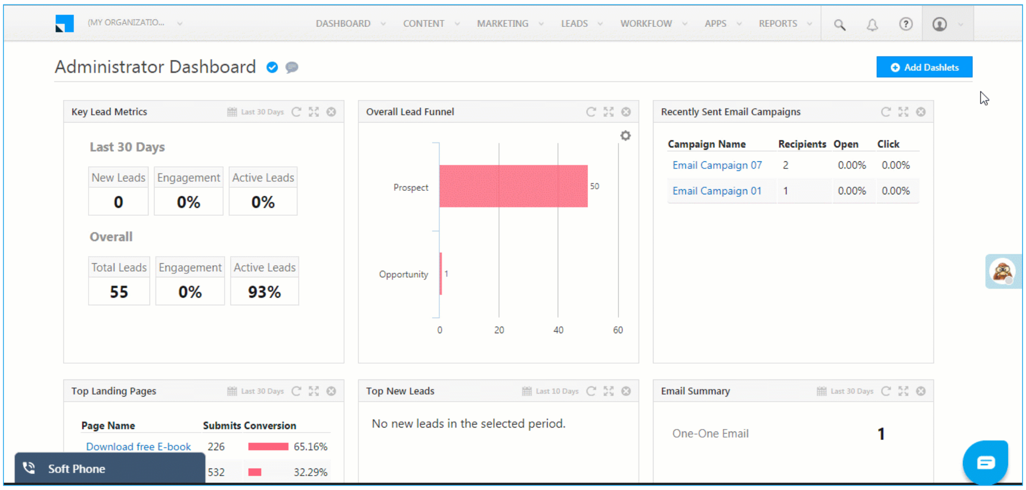


1. On the main menu, navigate to Leads → Manage Leads
2. Select the leads you want to add to an account by clicking the checkbox alongside the **Lead Name** column**.**
3. Hover your cursor over the **Actions** menu, then click **Bulk Update**.
4. From the **Lead Field** drop-down, select **Account**.
5. In the **New Value** field, select and existing account or select **Add New Account.**
6. Click **Update**.

- You can also add leads from the **Manage Accounts** page. On the main menu, navigate to **Leads → Manage Accounts** and click the account type name.
- On the **Manage Accounts** page, click **Add New Lead**.
- Alternatively, you can also use the list actions by hovering your cursor over the actions wheel, and then clicking **Add Lead** to add new leads or **Assign Lead** to assign existing leads.

Activities on Account

Create Activity Types : Accounts



Lead activities capture B2C activities performed on leads. You can similarly capture B2B related activities performed on your accounts. These activities help you log your interactions and track your overall journey with a particular business partner/vendor/associate.

Example Use Cases

Here are some examples of account activities to get you started –

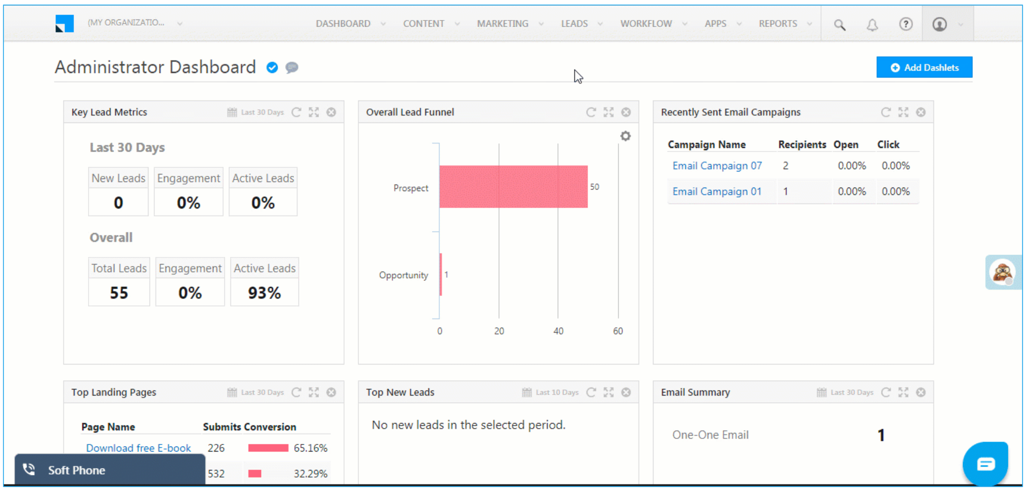
- Stakeholder Meeting
- Quotation Sent
- Contract Signed
- Contact Renewed
- Van/Umbrella Activity, etc.

Step one is to create the activity types you require. Once you've created an activity type, you can add activities of that type to your accounts from the Manage Accounts or Account Details page.

1. Navigate to Settings → Accounts → Custom Activities & Scores
2. Click the **Add** button.

3. On the **Add Custom Activity Type** pop-up, add all relevant details (see the table below for more information).
4. Now add custom fields related to the activity. Notes, Status and Owner fields are available by default. Click **Add Field** to add more custom fields. Select the Type as String, Number, DateTime, DropDown or User. You can also mark fields as mandatory. Click **Next** to go to the final step.
5. Customize how you want your add/edit activity forms to appear. Drag and drop the fields you want displayed on the form from **Available Fields** to **Activity Details**. Click **Add Section** to add another section to the form.
6. Click **Save**.

Add Activities to Accounts

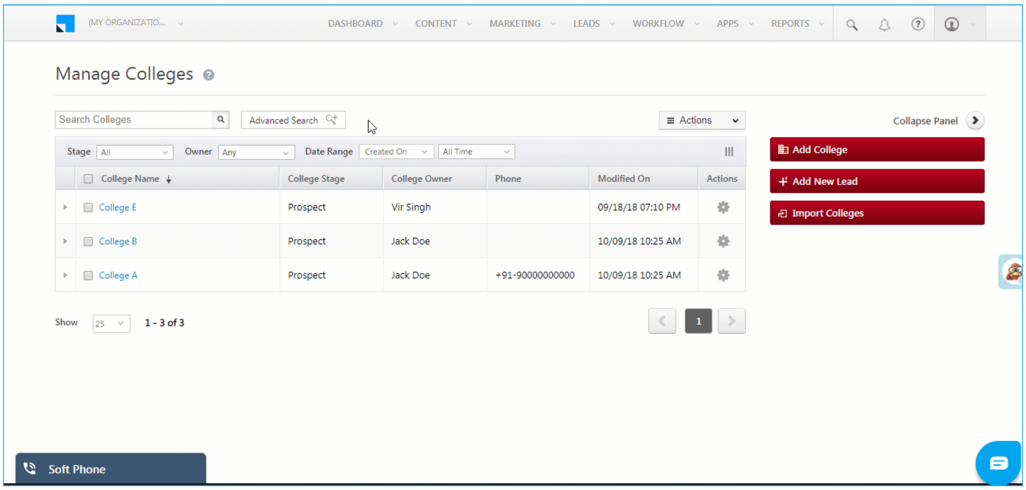


You can now add activities to your accounts from the Manage Accounts or Account Details pages.

Add Activities from the Manage Accounts Page

1. On the main menu, navigate to **Leads → Manage Accounts** and select an account type.
2. On the Manage Accounts page, alongside the account you want to add an activity to, hover your cursor over the settings wheel, then click **Add Activity**.
3. On the **Add Notable Activity** form, select an **Activity Type** from the dropdown (only your created activity types will show up here). Enter the fields relevant fields and be sure to fill in the mandatory data. Click **Add** to proceed.

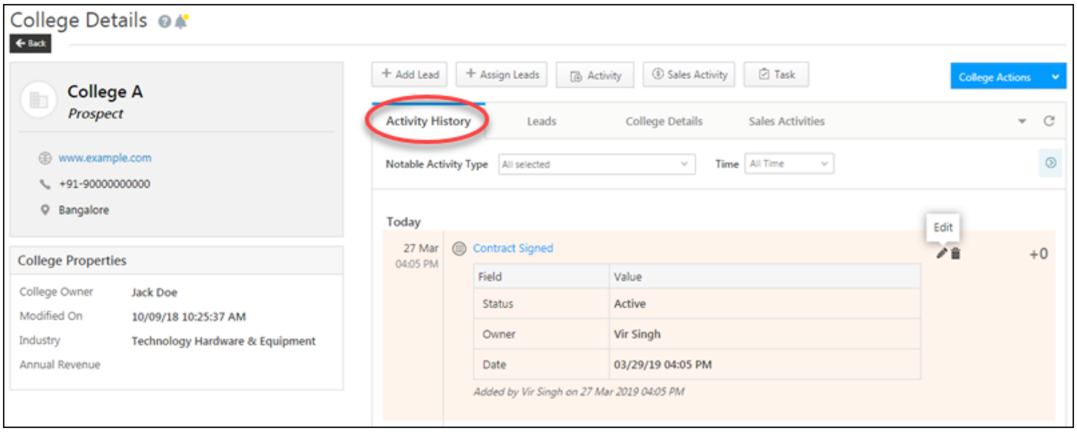
Add Activities via Account Details Page



Add Activities from the Account Details Page

1. On the **Manage Accounts** page, click the name of the account you want to add an activity to. This will direct you to the **Account Details** page.
2. Hover your cursor over the **Add Activity** button, then click **Account Activity**.
3. On the **Add Notable Activity** form, select an **Activity Type** from the dropdown (only your created activity types will show up here). Enter the fields relevant fields and be sure to fill in the mandatory data. Click **Add** to proceed.

Account : Activity History



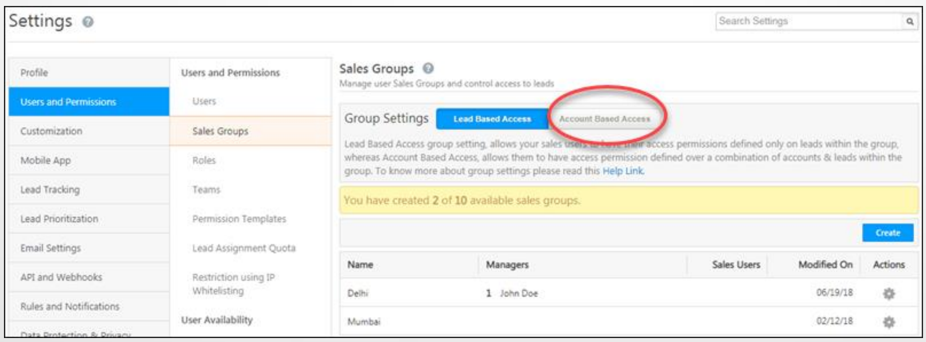
The **Activity History** tab of the **Account Details** page displays the list of all activities posted against an account. You can hover your cursor over an activity and click the pencil icon to edit or the icon to delete.

Managing Lead and Account Access for Sales Users – Sales Groups

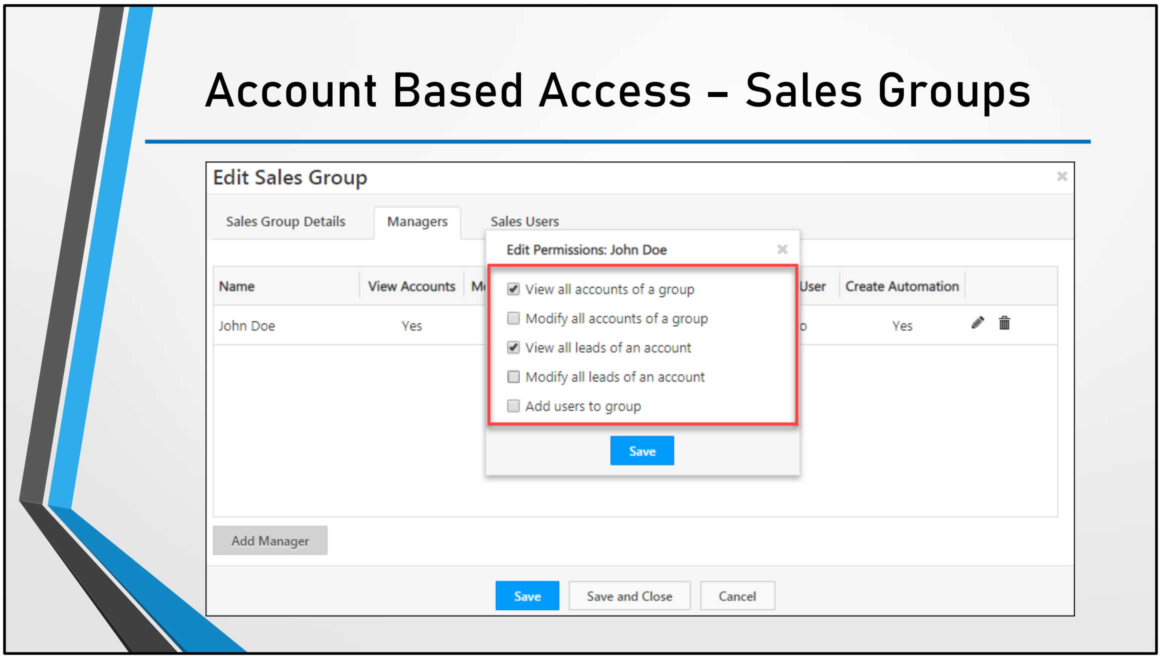
Note:
Group managers can view/modify all accounts and leads owned by the users in their sales groups.
Users that own leads in an account automatically get access to the account details page and can also post activities on the account.

Account Based Access – Sales Groups

- If you want to set permissions at the account level, you'll be able to control which accounts are accessible to a sales group.



Navigate to Settings → Users and Permissions → Sales Groups
Alongside **Group Settings**, click **Account Based Access**.
On the confirmation pop-up, click **Yes**



When you create or edit a sales group, while setting permissions for the group manager you'll now see account level permissions. Select the appropriate permissions, then click **Save**.

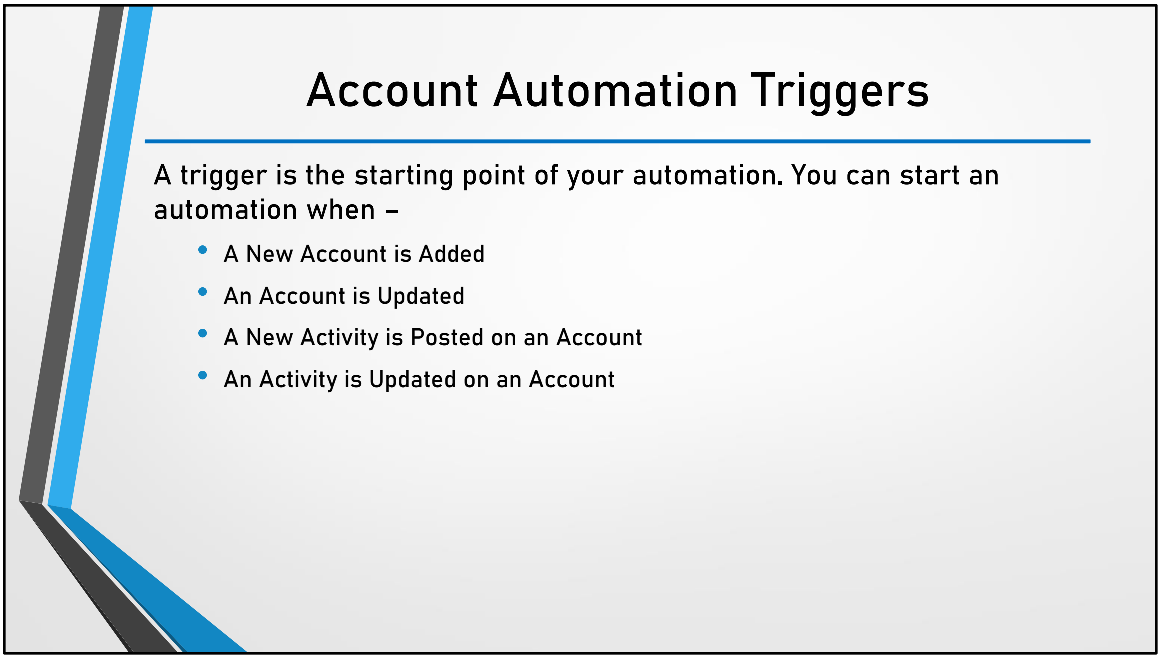
Note: Sales users in the group will have access (to view and modify leads) in **only to the accounts they own**. However, you can give the group manager permission to view and modify leads in all accounts owned by all the sales users in the group.

Account Automation

Account Automation

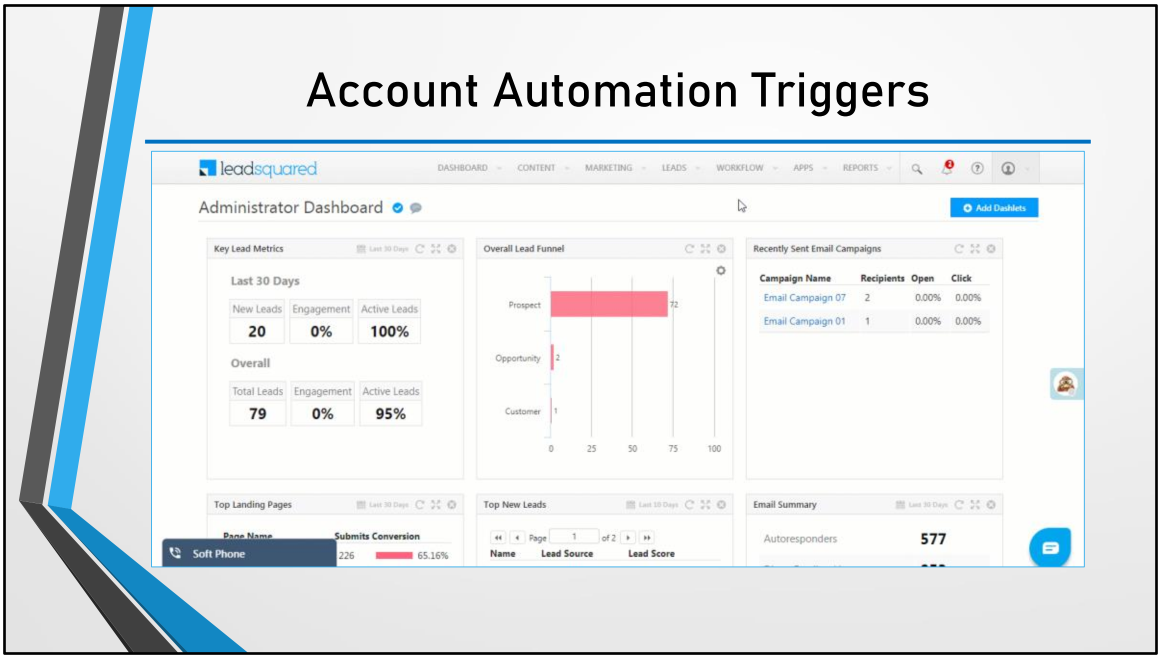
With account automation, you can create workflows around your B2B relationships.

You can notify account owners to act when new accounts are added, when an account's stage changes or when important events such as renewals or stakeholder meetings are due.



To create an account-based automation,

1. On the main menu, navigate to Worklow → Automation
2. Click **Create Automation**.
3. Choose the **Build from Scratch** option from the list of templates
4. Select an **Account Trigger**.



New Account
This option triggers your automation when a new account is created. Here are some examples of use cases you can automate –

- Update an account field when a new account is added.
- Notify an account owner when a new account is added.

Once you select the **New Account** trigger, choose an **Account Type** and set **Additional Conditions**.

Note: You can also set exit conditions to remove an account from the automation.

For example, if you want accounts from a certain account field (say, City) to enter your automation, you could set it up using the additional conditions.

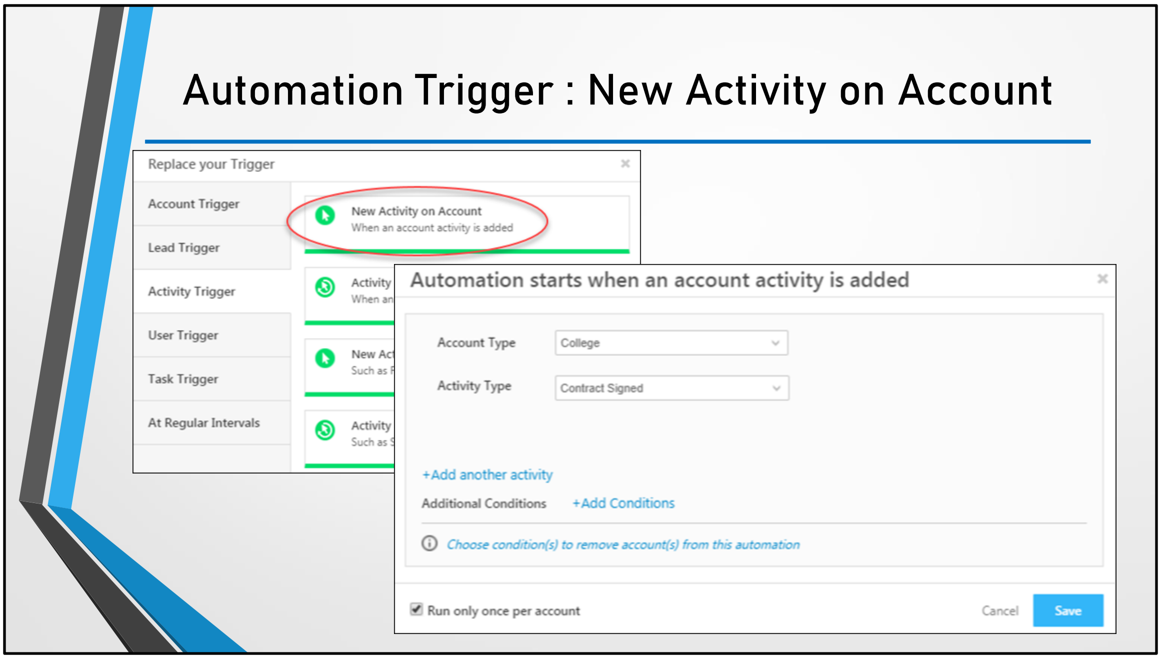
Account Update
This option triggers your automation when an account is updated (account field is changed). Here are some examples of use cases you can automate –

- Notify an account owner to act when the account stage changes from prospect to opportunity
- Notify users when stakeholder meetings, renewals or other important activities

are posted on accounts.

Similarly, when you select the **Account Update** trigger, you’ll have to select an **Account Type** and add **Additional Conditions**.

Note: The **Run only once per account** checkbox lets you run the automation for the account only once (for example, the account will enter the automation when the stage changes the first time. Subsequent stage changes will not trigger the automation again).

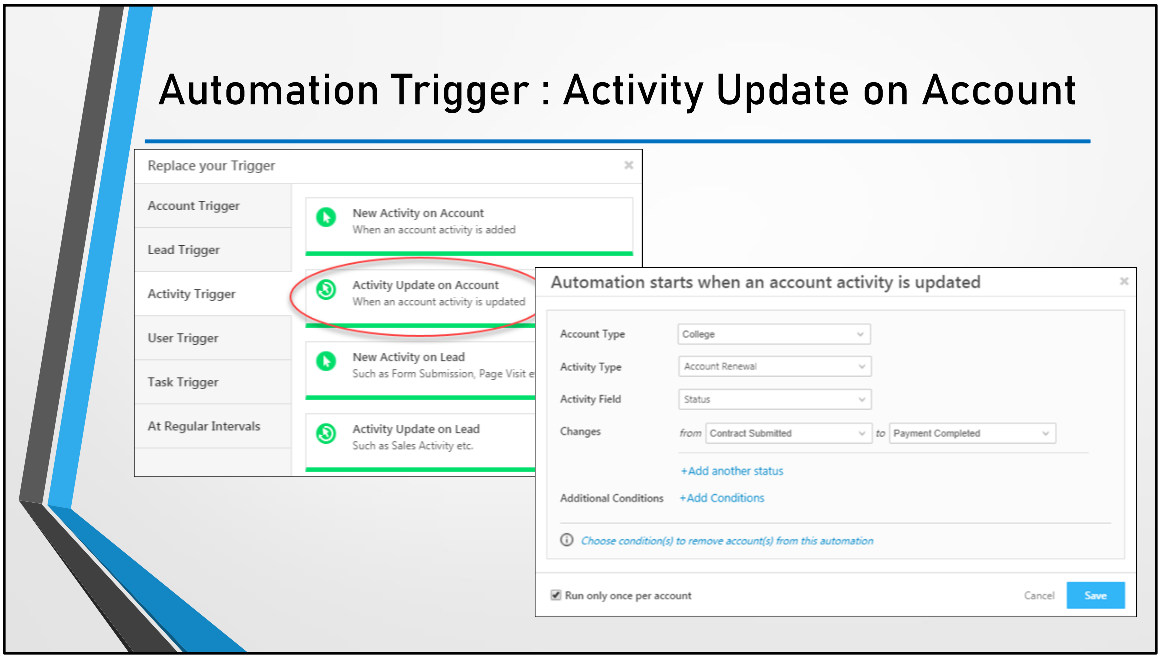


New Activity on Account
Use this feature to trigger an automation when a new activity is posted on an account. Here are some examples of how you can use this trigger –

- Change the account stage to say, 'Opportunity' when a 'Proposal Sent' activity is posted.
- Notify the account owner when a new 'Stakeholder Meeting' activity is posted.

Navigate to the **Activity Trigger** tab, then click **New Activity on Account**.

Choose the **Account Type** and **Activity Type** from the respective drop-downs. Click the **+Add another activity** link to add more activities. If you choose multiple activities, the automation will trigger when any one of the activities are posted.



This option lets you trigger an automation when an account activity is updated. For example, you can trigger an automation when –

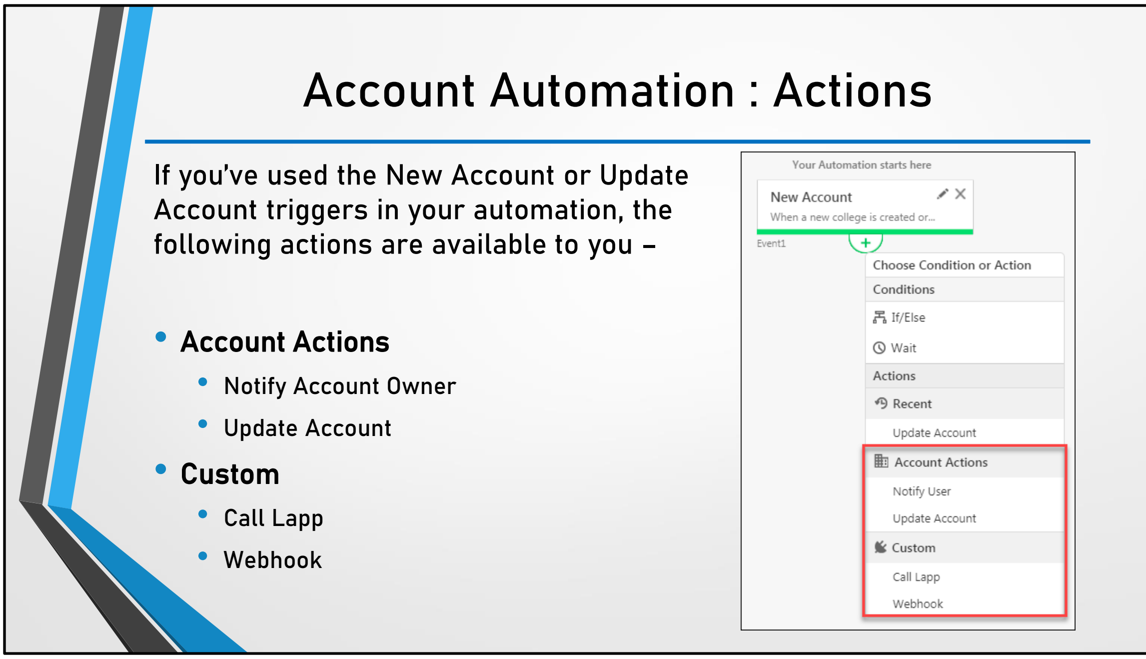
- The date of a 'Stakeholder Meeting' activity is changed. In this case, you can set your automation up to notify the account owner of the new date.
- Notify the account owner when the status of a 'Renewal Activity' has changed from say, 'Contract Submitted' to 'Payment Completed'.

Choose the **Account Type**, **Activity Type**, **Activity Field** (the automation will trigger based on an update in this field).

Account Automation : Conditions

Conditions in account automation are the same as those in lead automations.

Note: The Multi If/Else condition is not available for account automation.



Use cases for these actions include –

Account Actions

Notifying an account owner when a new account is added.

Notifying an account owner to take action when the account stage changes from say 'Prospect' to 'Opportunity'.

Updating an account field when a new account is added.

Updating an account field when a related account field gets updated. For example, you could update the account owner when the account stage changes.

Custom Actions

Calling a Lapp to perform calculations on account fields.

Creating a webhook to update an external system with data of an account.

Thank You!