
leadsquared
Basic Setting & Concepts
Product Training 101 | By Peeyush Pavanan

Learning Objective

This is the second module of the LeadSquared Product Training 101

In this module, we will…

- Comprehend the role of an admin and setup admin and organization profile
- Get an overview of the user personas using LeadSquared system
- Underline the concept of Teams and user hierarchy
- Explain the user access rights and implement the same in your LSQ system
- Enable workday template, leave tracker and holiday calendar
- Create custom lead fields and dependent lead fields
- Understand lead stages, lead sources and how to handle lead duplication

Role of an Admin

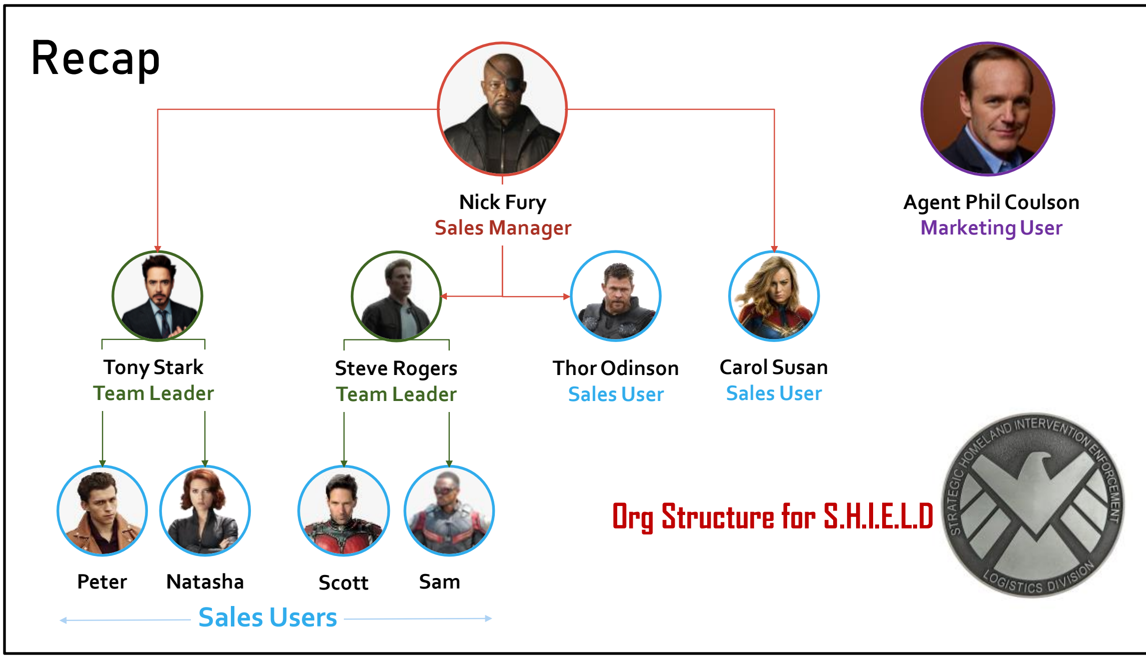
- Configure the application
- Add and maintain users
- Define User Access Rights
- Customize the application

Admin also known as System Admin has complete access to LeadSquared application.

User Profile and Company Profile

As part of the assignment, you will be

- Setting up profile
- Setting up an Organization profile
- Add Company logo



Nick Fury is the Sales Manager who is overseeing the entire Sales. Tony Stark and Captain Steve Rogers have their own team of Sales Users who will be converting the Leads into customers.

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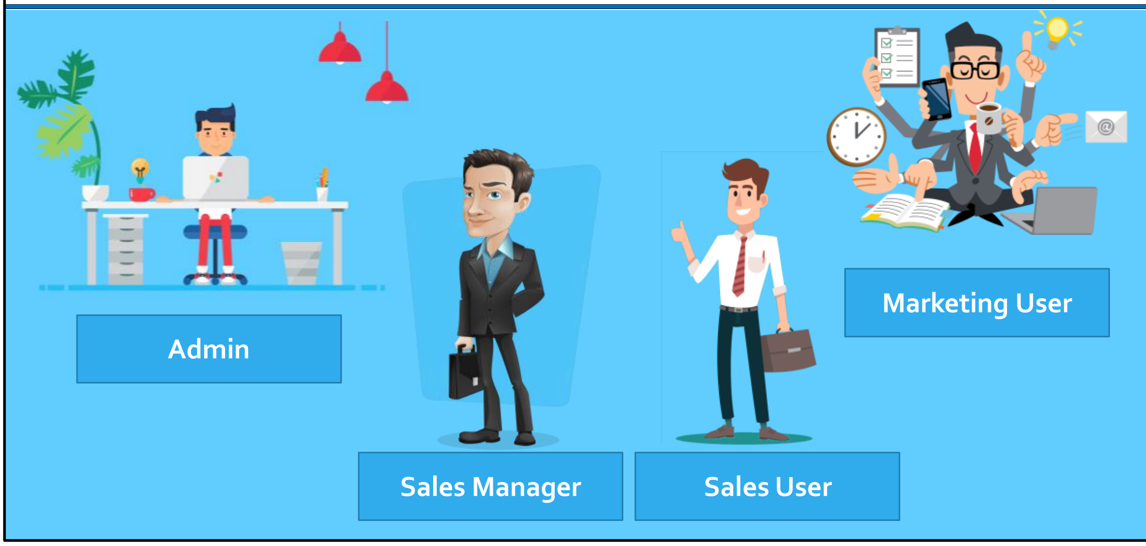
Agent Phil Coulson is responsible for Marketing the products & offerings of S.H.I.E.L.D.

User Personas



In an organization each users has their own responsibilities thus, should have access to relevant features to do their day to day job. For example,

An Admin is the user who needs to have access to everything in LeadSquared as he/she is responsible for configuring and customizing the product as per business requirement

Sales User needs access to Sales Activities features considering his/her day to day job is working with leads and converting them into Customer for the organization

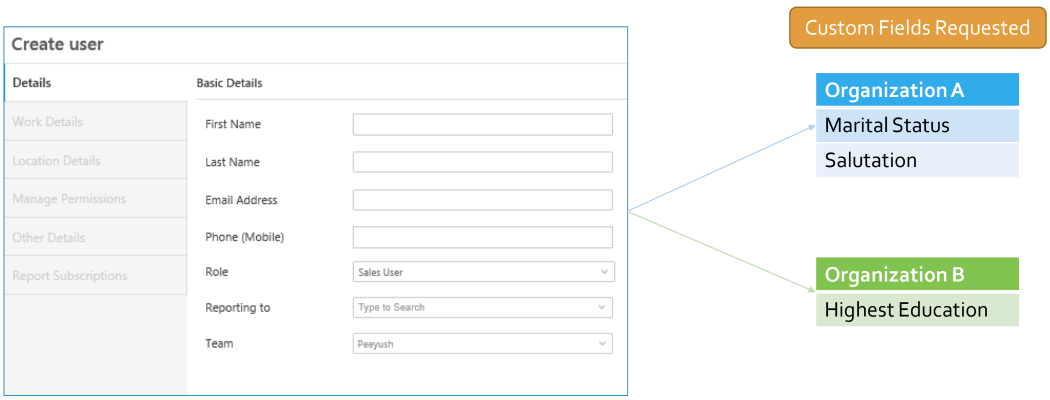
Marketing user needs access to Marketing features of LeadSquared like Email Campaign, Marketing Reports and Dashboards etc.

We can restrict and grant access to each user or group of users in LeadSquared. Admin is the one responsible to maintain and create new permission sets as per their business requirement.

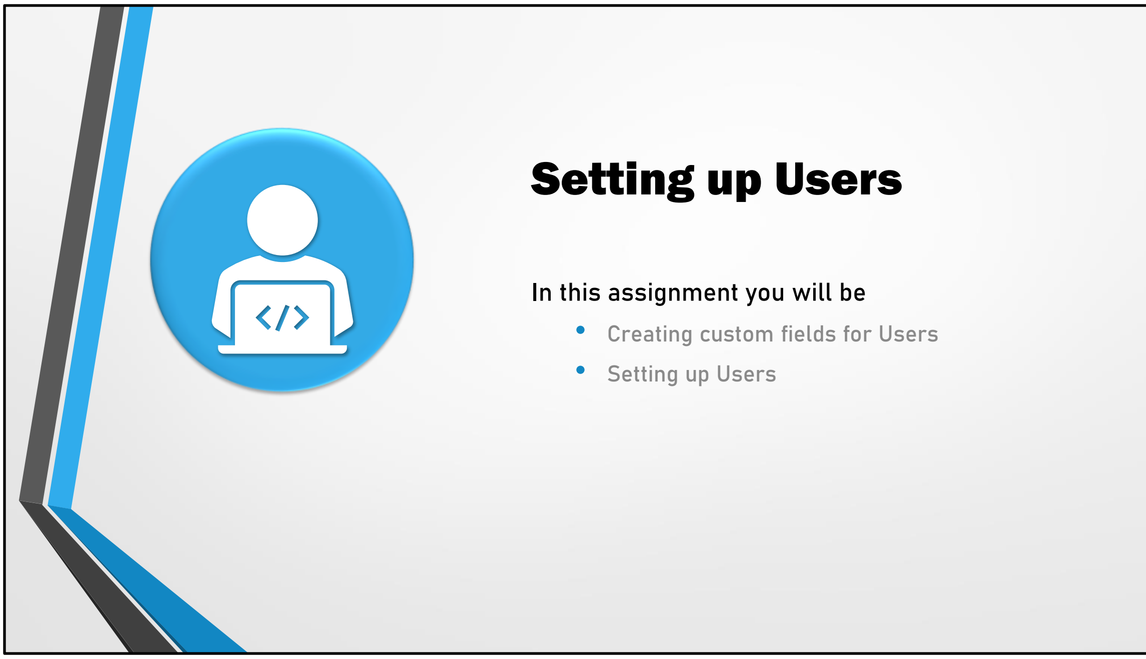
Different Roles – Different Access

User Role	Access Rights
Sales User	• Can access only the Leads assigned (where the user is the Lead Owner) • Cannot access Marketing Functions like Website Widgets, Landing Pages, Autoresponders
Sales Manager	• Can access ALL leads (leads assigned to any user) • Cannot access Marketing Functions like Website Widgets, Landing Pages, Autoresponders • Limited access to Settings
Marketing User	• Can access ALL leads (leads assigned to any user) • Can access all Marketing Functions • Limited access to Settings (more than Sales Manager but less than Administrator)
Administrator	• Full access to everything

Custom fields for User

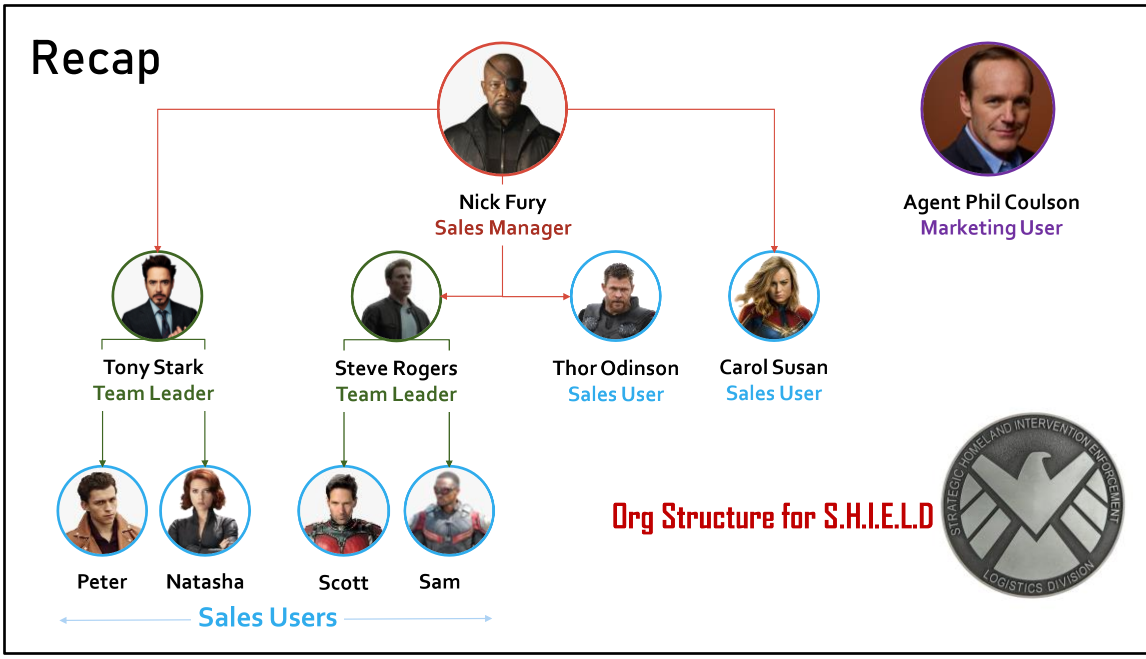


Each organization has their own requirements and no two organizations are same. Similarly while setting up a user, there are good chances an organization may have their own set of custom fields they need for a user which is not covered by the core fields of LeadSquared for the users. In such a case, Admin can configure custom fields for Users.



In this exercise, we will be creating following user fields:

Users: As per the organization hierarchy we discussed in S.H.I.E.L.D business case.



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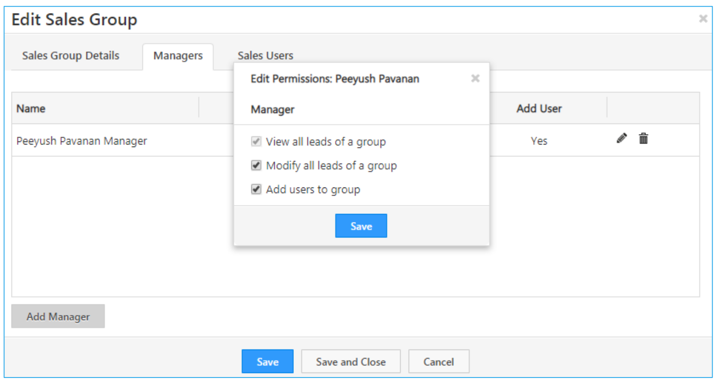
Sales Group

Sales Group is group of users with role Sales User where in one user can be assigned as Group Manager.

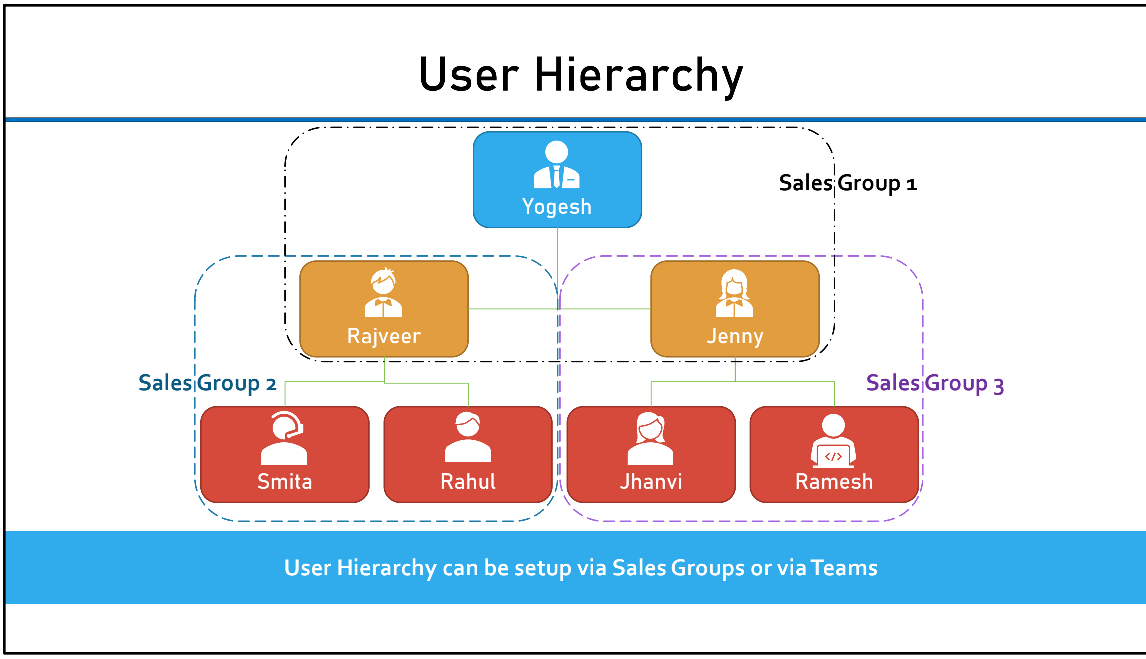
The group manager will have access to all the leads belonging to the members of that group.



Can the group manager access be View All Leads, or Modify All Leads too depends on what access are provided at the time of making the user as group manager.

Question

If a user with Sales Manager Role can see all the leads in the LeadSquared account, why there is a need for Sales Group Manager?



User Hierarchy can be created two ways in LeadSquared System:

- Teams
- Sales Group

Each feature has its own benefits.

1. With Teams, like we learned users assigned to a team can share same workday template, holiday calendar and smart views. Teams also allow auto user check in-check out. More about that feature will be covered in automation module.
2. With Sales Group, individuals belonging to different sales group can have different access rights depending upon what rights are defined for the Sales Group they are assigned to.

Now it is up to the one who purchases the LeadSquared system to determine what fits best for their business case. If needed they can opt one over the other or go with both since, user hierarchy build via each way has it own benefits.

In case of Sales Group,

- one user can be part of multiple Sales Groups
- one user can also be the manager of multiple Sales Groups

- There could be multiple Sales Managers in one Sales Groups.

The Sales Manager will have access to the leads assigned to the Sales Users who are part of the Sales Group to which Sales Manager belong too.

For example: Rajveer will have access to the leads assigned to Smita and Rahul, while, Jenny will have access to the Leads belonging to Jhanvi and Ramesh. Yogesh will have access to the leads belonging to all the sales users (Smita, Rahul, Jhanvi and Ramesh)

Creating Sales Groups

In this assignment, you will be

- Create Sales Group for Team Leaders

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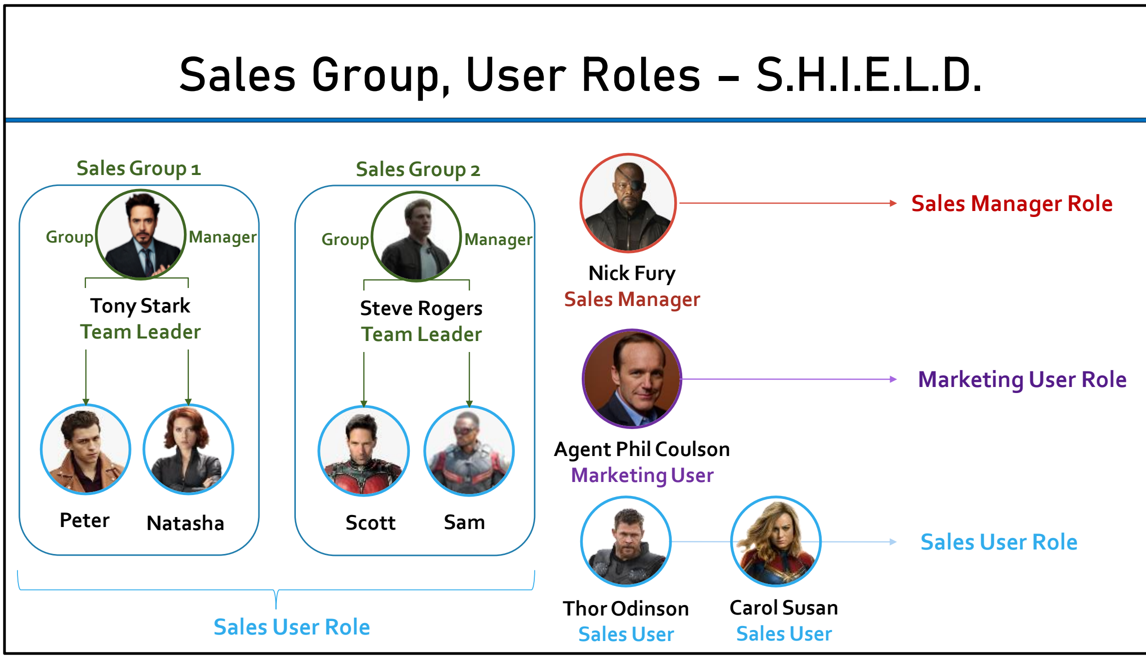


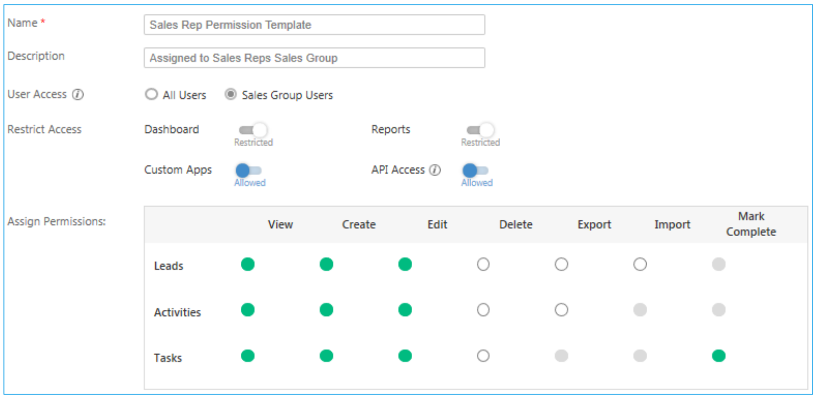
In our case of S.H.I.E.L.D. Insurance, we would need two Sales Groups. One for Tony Stark in which we would add Peter and Natasha as the group members and Tony as group manager. Another group will be for Steve Rogers as group manager with Scott and Sam as group members.

As a pre-requisite to add Tony and Steve as group managers they need to be assigned with Sales User role.

Thor and Carol will have Sales User role too but not added to any Sales Groups.

Agent Phil Coulson will need Marketing User Role and Nick Fury with Sales Manager Role.

Permission Set



Permission Set grants edit and access rights which can be assigned to an individual users, role or Sales Group

Permission templates let you configure access rights for your users. In other words, they let you control who sees what and which users can create, edit, delete, export or import your data.

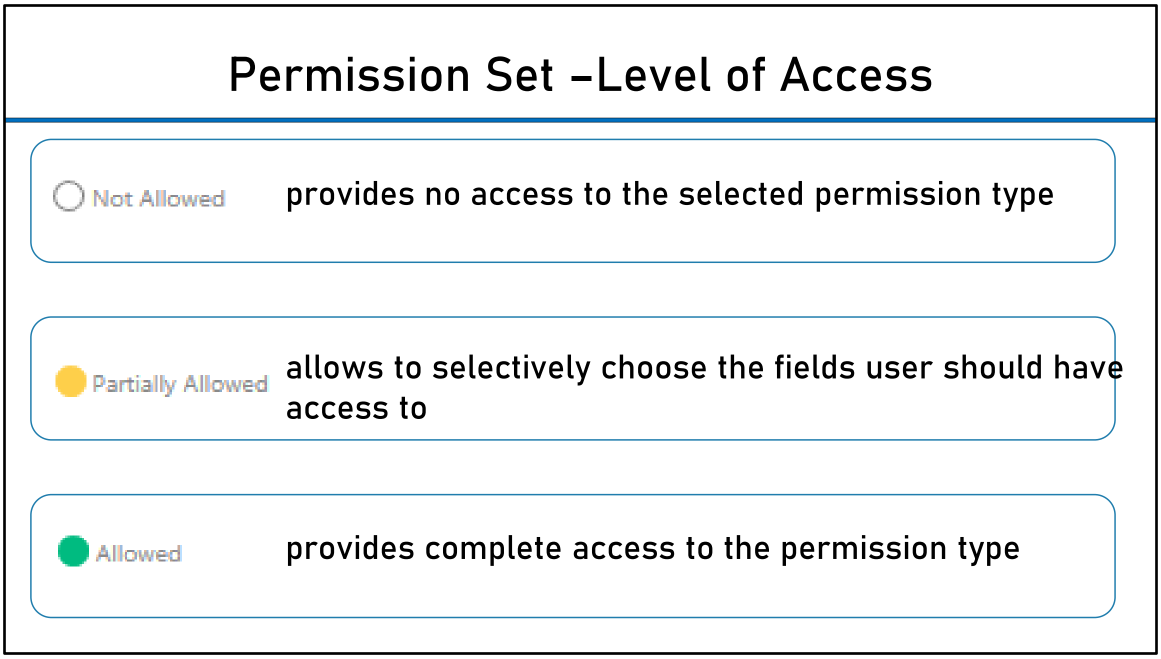
Following are the primary two step you need to setup access control:

1. Create a permission template to control access to features and actions.
2. Apply that template at the user, role, or sales group level.

With permission templates, you can restrict users from –

- Viewing, creating, editing, deleting leads, exporting and importing leads
- Viewing, creating, editing, deleting and exporting activities
- Viewing, creating, editing, deleting and marking the task as complete
- Accessing accounts, dashboards, reports, custom apps and APIs
- You can also configure partial access and allow leads to view/edit only certain lead fields/activities/tasks.

Permission Set is used for restricting access which means if the user is not having any permission template assigned the user will have full access.



As we seen in previous slide, the access a user has on Leads, Activities and Tasks are

- View
- Create
- Edit
- Delete
- Export (Only for Leads and Activities)
- Import (Only for Leads)
- Mark as Complete (Only for Tasks)

1. Full Access or **Allowed** provides complete access to the permission type.
2. No Access or **Not Allowed** provides no access to the selected permission type.
3. Partial Access or **Partially Allowed** allows to selectively choose the fields user should have access to

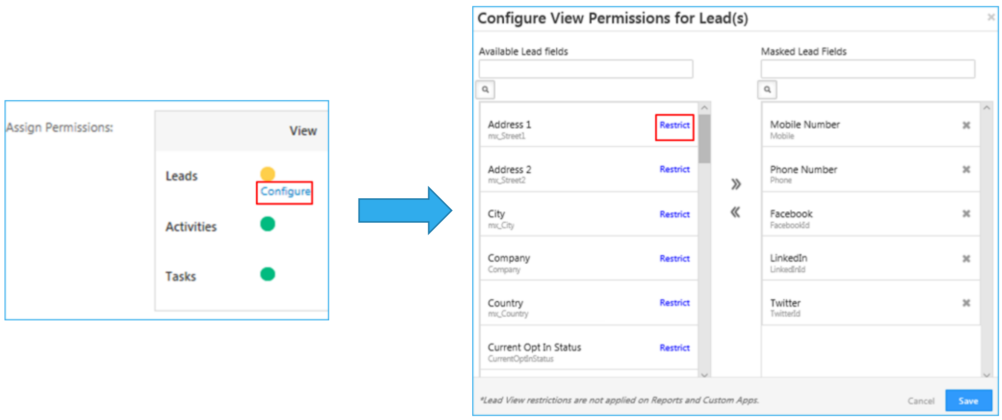
In case of **Export** and **Import**, only Not Allowed and Allowed access can be configured. Delete for Leads can also be configured as Allowed or Not Allowed.

Access rights which could be Partially Allowed are:

- View

- Create
- Edit
- Delete (Only for Activities and Tasks)

Partially Allowed



Assigning Permission Template

To Individual User

To assign a permission template to an individual user, navigate to:

1. Settings → Users & Permission → Users
2. Hover over icon under Actions column of the User you want to assign the permission template
3. Click on Set Permissions from the options displayed
4. In the pop-up window, click on Add link next to the Permission Template you want to assign to the user
5. Click on Save

To Roles

To assign a permission template to a role, navigate to:

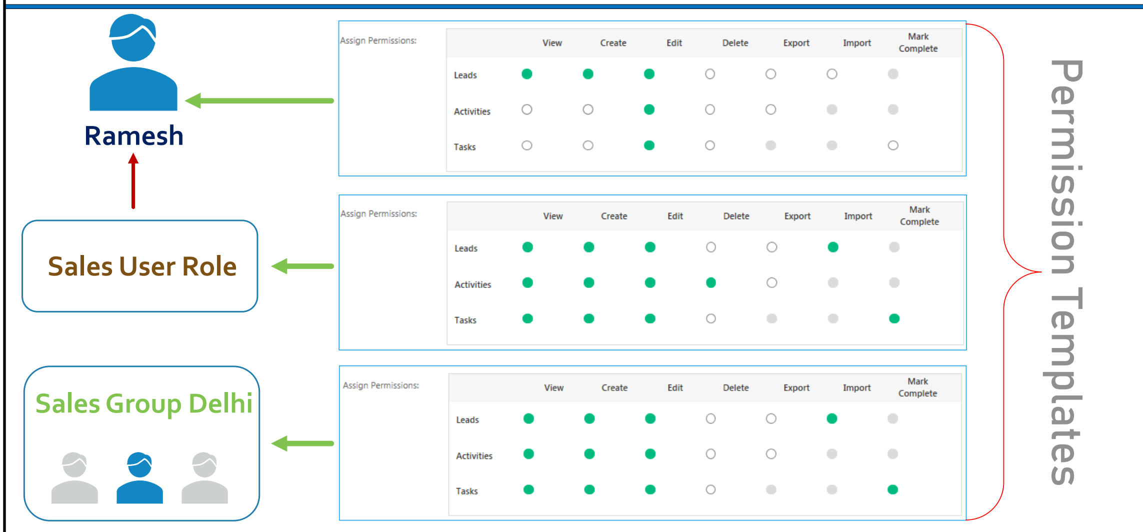
1. Settings → Users & Permission → Roles
2. Hover over icon under Action column of the Role you want to assign the permission template
3. Click on Set Permissions
4. In the pop-up window, click on Add link next to the Permission Template you want to assign to the role
5. Click on Save

To Sales Group

To assign a permission template to a sales group, navigate to:

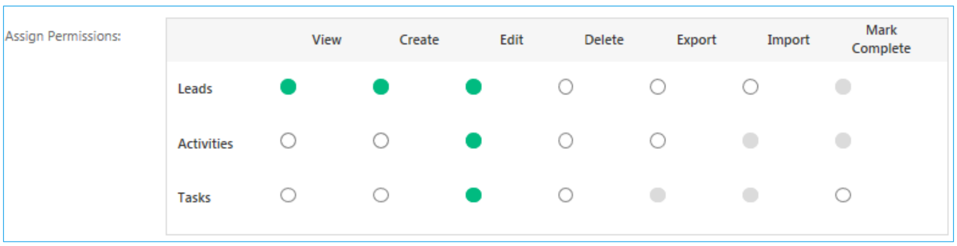
1. Settings → Users & Permission → Sales Groups
2. Hover over icon under Actions column of the Sales Group you want to assign the permission template
3. Click on Set Permissions from the options displayed
4. In the pop-up window, click on Add link next to the Permission Template you want to assign to the Sales Group
5. Click on Save

What access User have?



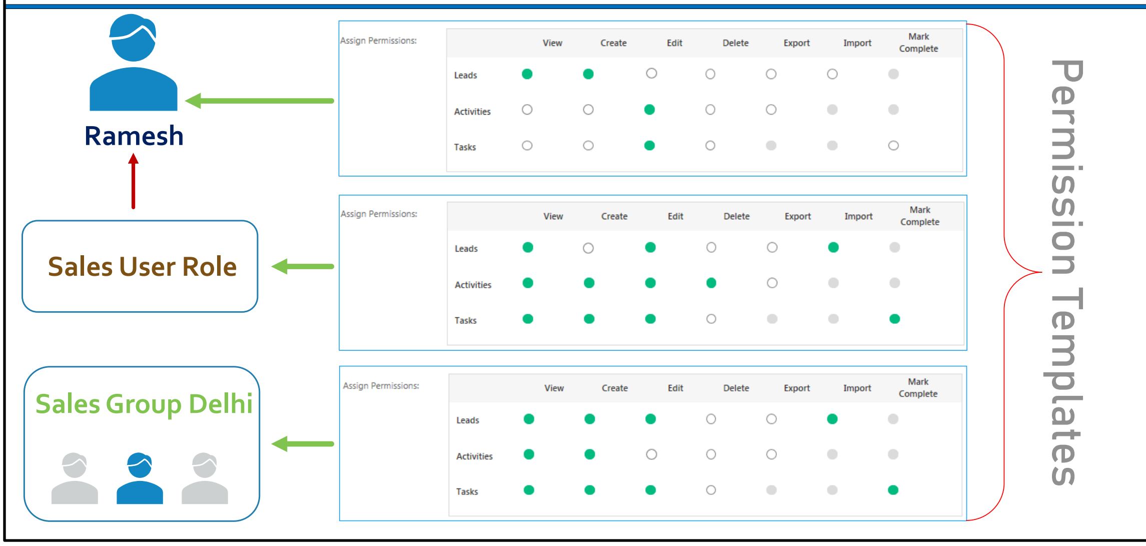
Let's say, Ramesh has a Permission Template assigned to him at user level, another assigned to the User role he is mapped to and third permission templates assigned to the Sales Group he is part of. What access Ramesh will have on Leads, Activities and Task?

What access User have?



User will have the least access of all the access combined as displayed above

What access User have?



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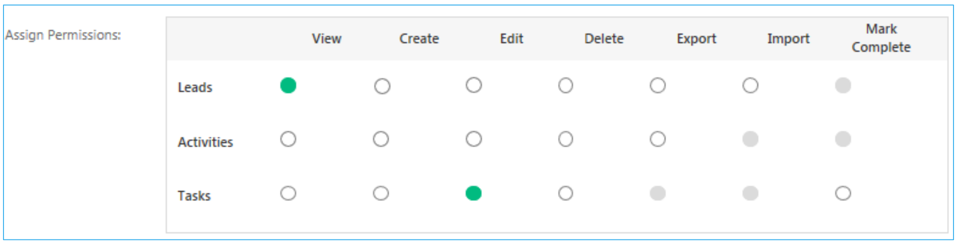

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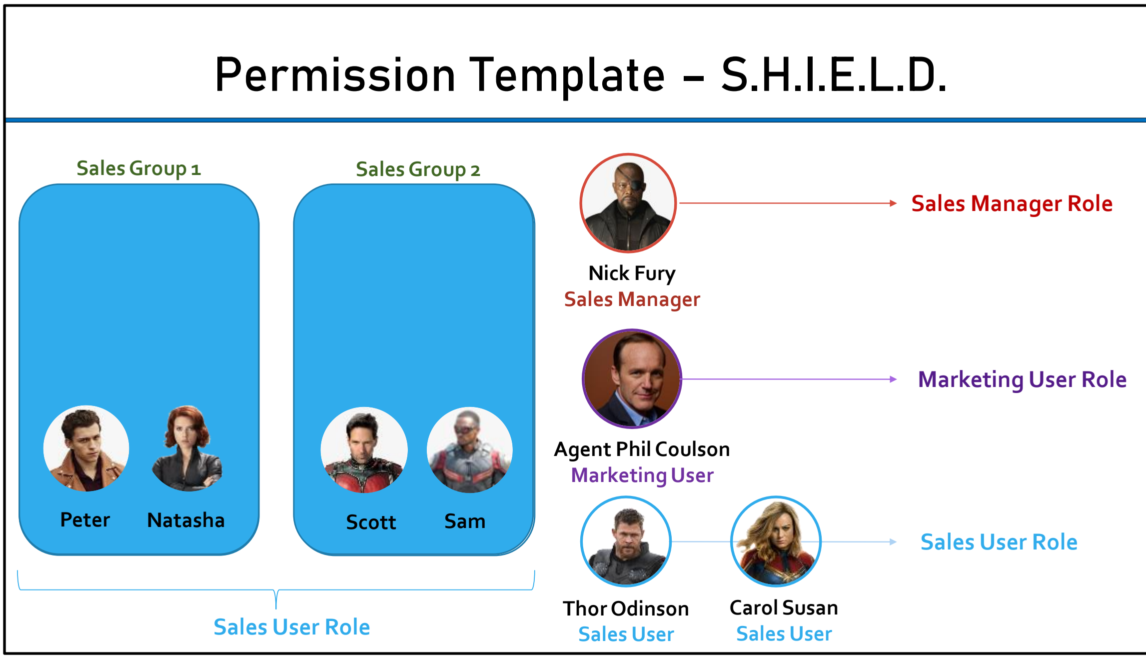


Let's revisit our scenario. Now considering Sales Users are only supposed to convert the leads into customers, they should not be able to do somethings like deleting leads, delete certain type of activities. Also, confidential information about leads should not be exposed to them, so on. Hence, there needs to be a permission template to control that.

At the same time, Thor and Carol handling high priority customers should have more privileges than other sales users. Hence, we need separate permission templates for these users which is not mapped to the user role. Let's see how we can do the same.

The permission template that we will create for Peter, Natasha, Scott and Sam, cannot be assigned to the Sales Groups since, that would be applicable to Tony and Steve too which would mean Tony and Steve will have limited access too. Now that is not something we want. We cannot assign the permission template to the Sales User role too as it would be then applicable to Tony, Steve, Thor and Carol too thus, not satisfying the criteria. Hence, we would have to assign the permission template to the users directly.

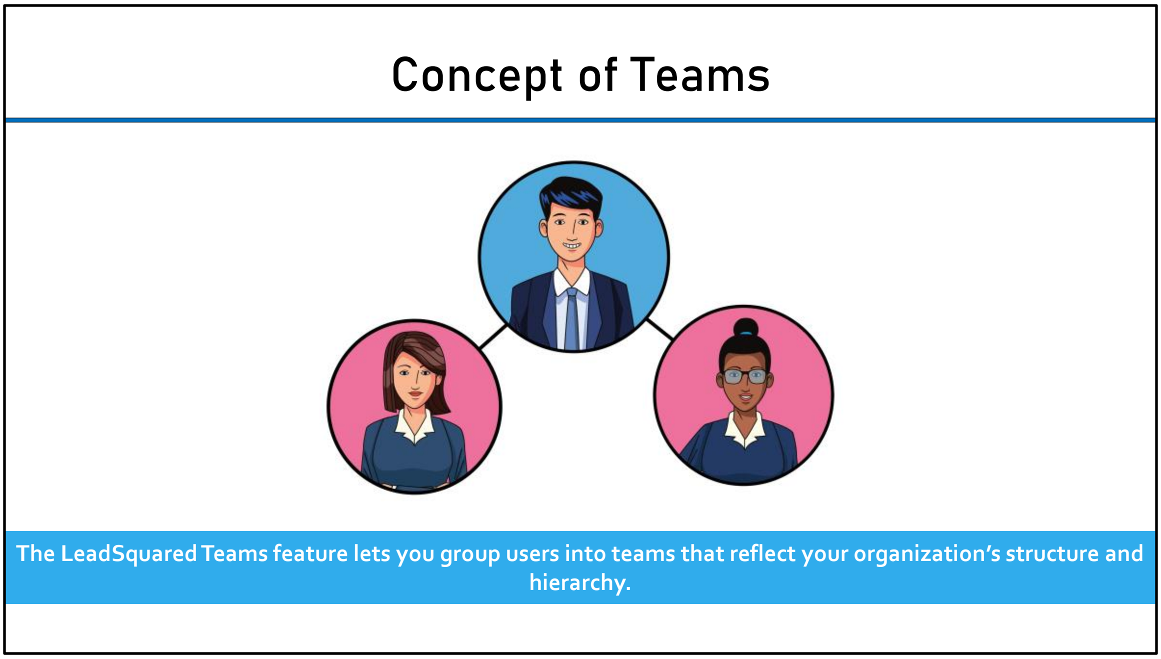
The permission template that we will create for Thor and Carol too has the same issue when we apply to Sales User role as it would be then applicable to all the Sales Users. Even though Peter, Natasha, Scott and Sam also has the Sales User role, this permission template will not grant them more access as the permission template we created before and assigned to them individually has least access. However, it would be applicable to Tony and Steve who are team leads but were given Sales User role only to be added in the respective Sales Group as a group manager.

Also, because Thor and Carol are not part of any Sales Group, thus we cannot assign this Permission Template to the Sales Group. Hence, it must be applied individually to users.

User Access Rights

As part of the assignment, you will be

- Creating Permission Template
- Assigning users to permission template



The most powerful merit of using this feature is the ability to auto check-in your users. You can configure work-day templates and holiday calendars in accordance with your organization's work schedule. Once set up, your users will automatically check in and check out based on these configurations. What's more, the leave tracker lets you track which team members are on leave, so you get a complete attendance management solution.

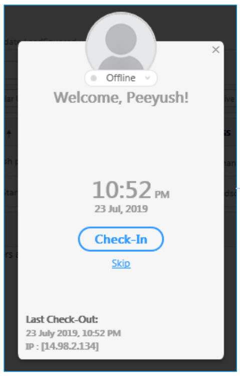
We will talk about User Check in – Check out, Work Day template configuration and attendance management in the next few slides.

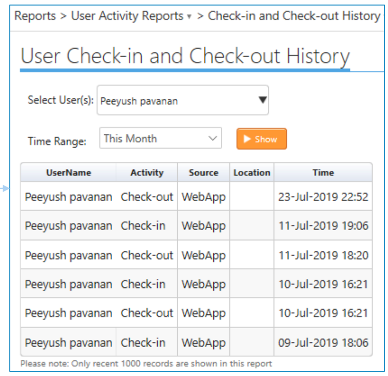
Cumulative User column in the Teams provides the number of users assigned to the current teams and teams below the parent team.

Note: Teams once created, can be deleted only if the following conditions are true:

1. There are no users assigned to the team which you want to delete
2. There are no Child teams assigned to the team which you want to delete
3. The top most team cannot be deleted once created.

User Check in – Check out



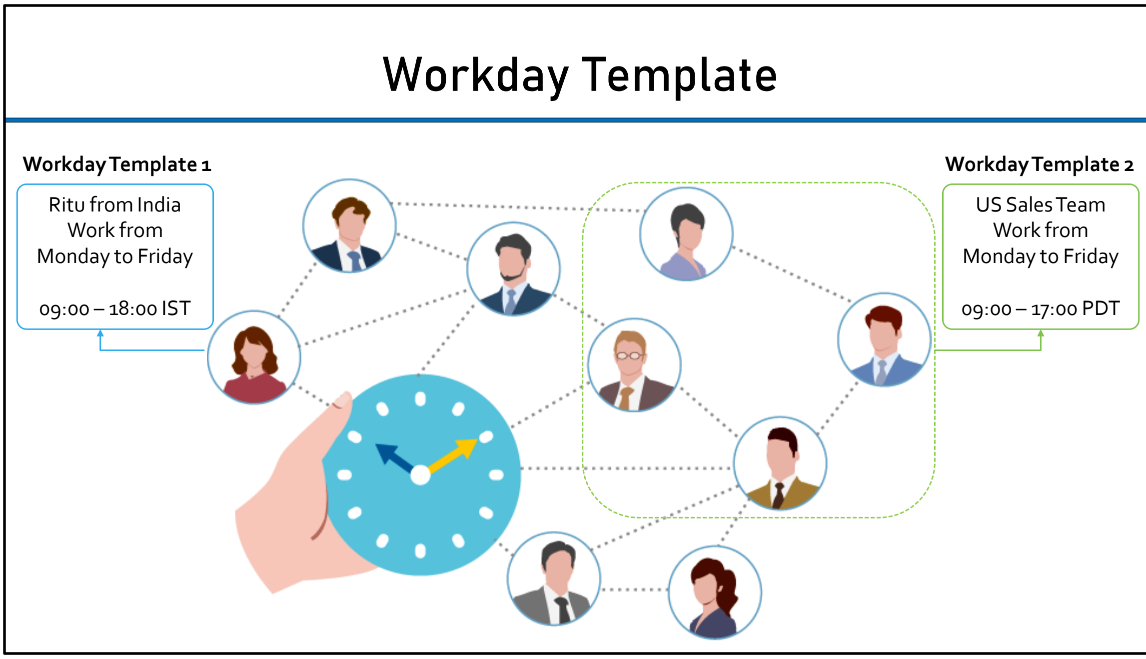


UserName	Activity	Source	Location	Time
Peeyush pavanan	Check-out	WebApp		23-Jul-2019 22:52
Peeyush pavanan	Check-in	WebApp		11-Jul-2019 19:06
Peeyush pavanan	Check-out	WebApp		11-Jul-2019 18:20
Peeyush pavanan	Check-in	WebApp		10-Jul-2019 16:21
Peeyush pavanan	Check-out	WebApp		10-Jul-2019 16:21
Peeyush pavanan	Check-in	WebApp		09-Jul-2019 18:06

Check-In/Check-Out feature of LeadSquared allows the organization leadership or responsible managers to have an overview of the users reporting

Now you know when and where your users’ check-in and check-out, and their online statuses. You also get insights on the general attendance trends of your users through reporting.

What’s more, you can also distribute leads only to users who are available/checked-in to LeadSquared.



Work day templates let you define the schedule and working hours of your organization so you can automatically check-in your users*. It lets you set the timezone you work in, working days and office hours.

Once created, you can assign the templates to teams. So if you have multiple teams working different shifts in different regions, all you have to do is create the appropriate work day templates and apply them to your teams.

Leave Tracker

For Admin User

1. Navigate to
   Settings → Profile → User and Permissions → Leave Tracker
2. Click Add Leave to create new leaves
3. In the **New Leave** pop-up enter the appropriate details.
4. Click **Save** when done.

For Non-Admin User

1. Navigate to
   Settings → Profile → My Leaves
2. Click Add Leave to create new leaves for users. A user select drop-down will be available in the Add Leave pop-up.
3. Admin can also edit or delete leaves by clicking the Settings icon.

The Leave Tracker enables you to manage the leaves of all your users in one place.

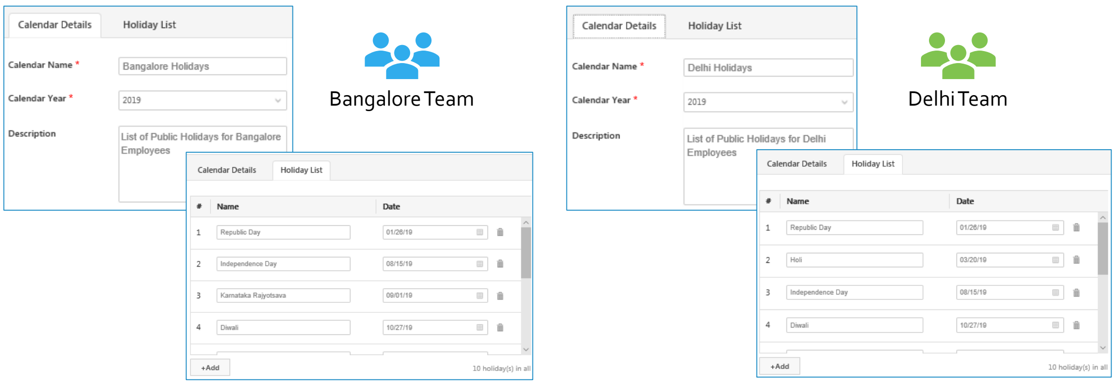
Users can create their own leaves while administrators can create leaves for all users.

The following section tell you how you can fill in your own leaves if you're not an administrator user (or sales group manger) and how you can manage all leaves if you are.

Fields in Leave Pop Up

- **Leave Type:** Apply for full day or partial leaves. If you choose the full day option, you can see the number of days you're creating leaves for.
- **From:** The day the leave starts from. You can also enter the time for partial leaves.
- **To:** The day the leave ends on. You can also enter the time for partial leaves.
- **Reason:** It is mandatory to enter a reason for each leave you create.

Holiday Calendar



The Holiday Calendar feature lets you create your organizations holiday schedule in your LeadSquared account

You can apply the holiday calendars you create to different teams across different regions. You'll also be able to auto check-in (coming soon) your users in accordance with the holiday calendar.

Creating Teams

In this assignment, you will be

- Create User Hierarchy via Sales Group
- Configure user for day to day work
    - User Check in – Check out
    - Workday Template

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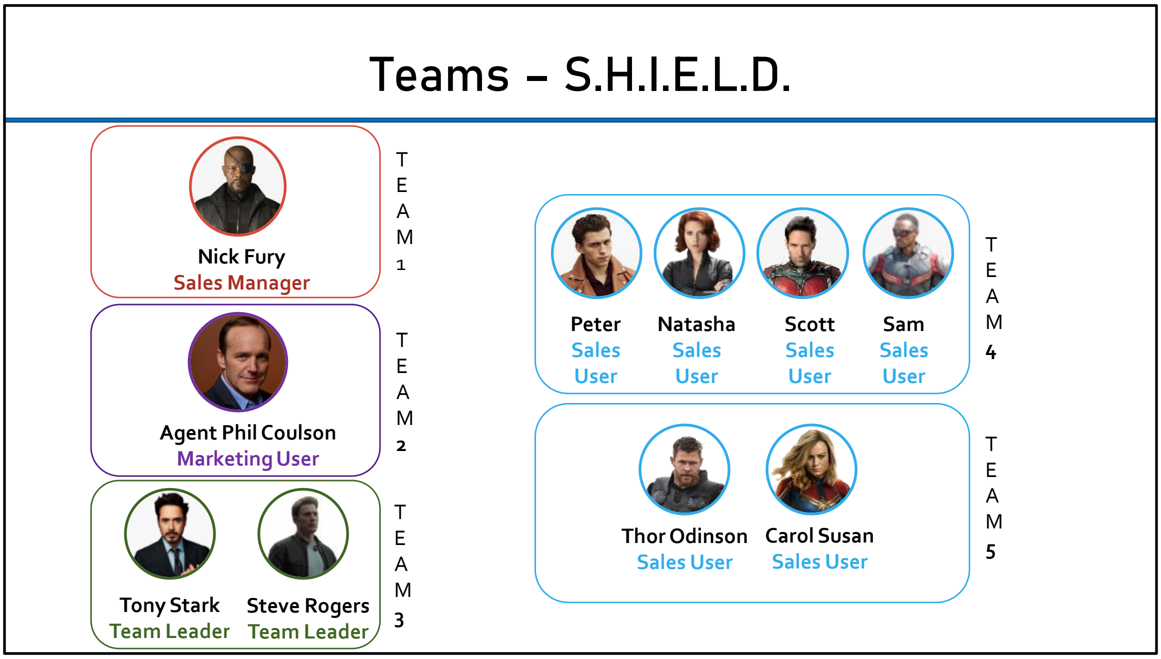


Considering every Sales User in this organization has same work timing, we can create one WorkDay template and assign to respective teams. However, we do not need Tony and Steve who are the team leaders to check in thus during the Check In-Check Out enablement we can exclude them from checking in and checking out.

Also, Team Leads of S.H.I.E.L.D would require a separate team as that will allow us to setup custom smart views for the team leads. Same goes with Thor and Carol who are also sales user but requires separate view than other sales users, thus we need to create separate team for them.

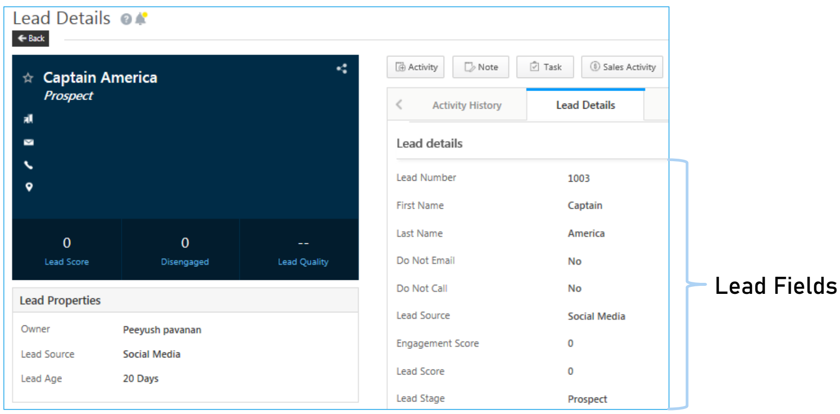
Of course Phil and Nick's role are different thus having the need of separate smart views which means we need to create separate teams for them too.

Let's see how we can set this up. But before that, let's understand different features that could be assigned to Teams like WorkDay template, Holiday Calendar and Smart Views.

Lead Fields

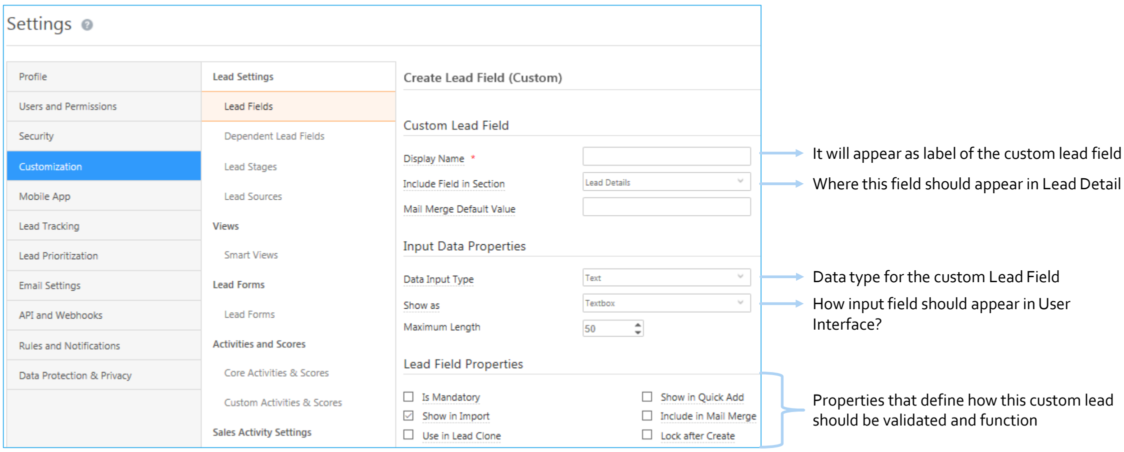
Lead Fields

Lead Fields are the specific fields where you store the details of the Lead that are relevant for your business need. For example: First name, Last name, Phone number etc.



There are core lead fields comes with the LeadSquared application and custom fields which are generally created business to business by the admins during the customization to meet the business requirement.

Lead Field Settings



Different types of Data Input with respective settings for custom leads are:

1. Text: Textbox or Textarea
2. Number: Decimal or Integer
3. Email: Email
4. Phone: Textbox or Phone Control
5. Website: Url
6. Date: Date or Date Time
7. Time: Time
8. Dropdown: Dropdown, Searchable Dropdown or Dropdown with others
9. Multi-select Dropdown: Multi-select Dropdown
10. Boolean: Radio or Checkbox

Further settings for

Phone: With Phone Control option you can restrict Phone numbers length by defining maximum and minimum integer

Dropdown: You can have…

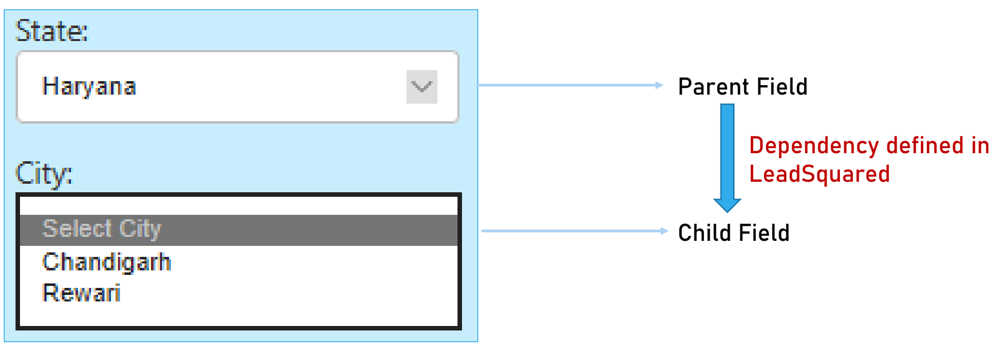
…Searchable dropdown values. You can key in the text field and see the relevant options available, matching the letters entered

…and dropdown with others. This dropdown field will have **Others** as a default option along with the list of options provided.

Dependent Lead Fields

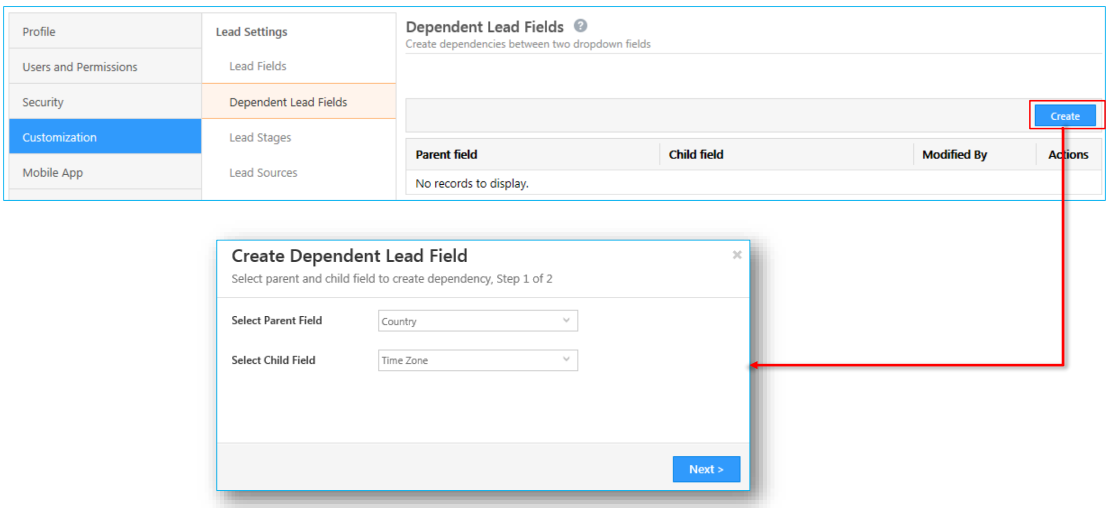
In LeadSquared, you can create a dependency between two or more drop-down lead fields.

For example: By selecting a value in State field, City field would show you the relevant options. In this scenario, State field will become the parent field and City field will be the child field



This feature allows you to create a dependency between two or more drop-down lead fields. You can create dependency between any two drop-down lead fields by selecting them as the parent and the child fields, respectively. This dependency can be used in the various Lead Create forms of LeadSquared.

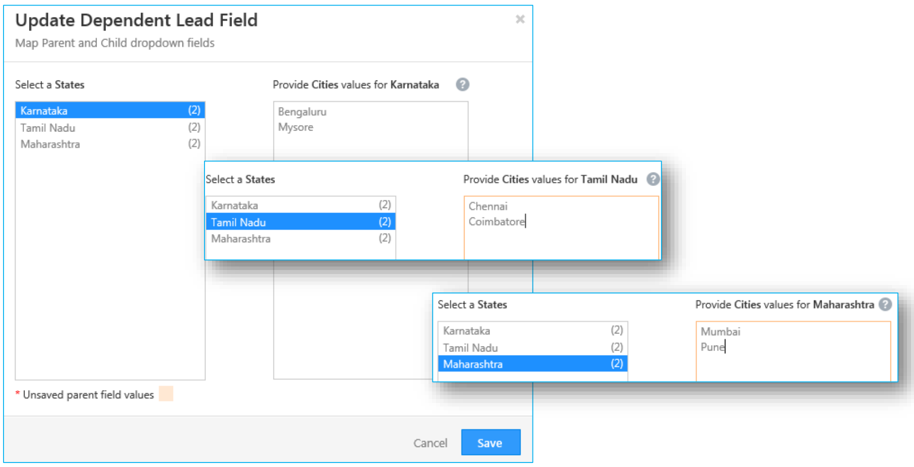
Creating Dependent Lead Fields



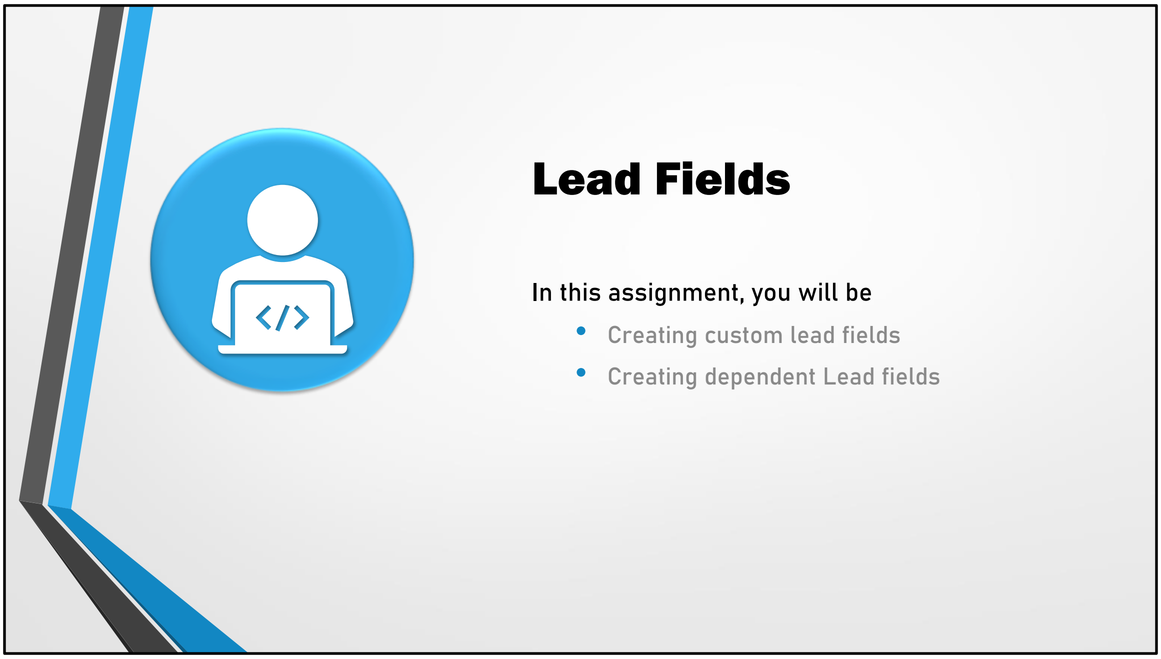
To create Dependent Lead Fields, first you need to identify the parent and child field. You can find the list of Lead Fields by going to Settings → Leads → Lead Fields under Lead Settings

Once the parent and child fields are identified, navigate to Dependent Lead Fields from Settings → Leads → Dependent Lead Fields and click on Create button to create the dependent lead fields

Creating Dependent Lead Fields



- Once you have selected the Lead fields for Parent and Child, click on Next.
- In the next window, you will see parent column and child column.
- In the Parent Column, you will see the options defined in the Lead field mapped to Parent field. Select individual fields and define the values to be displayed in the Child Field by writing it manually in Child Column.
- Do the same for all the parent values one by one.
- Once, the child values are defined for all thee parent values, click on Save. You have successfully created the dependent lead fields.



In our case of S.H.I.E.L.D. you will have to create four custom lead fields.

1st Lead Field: **Superhero Power**: This lead field must be multi-dropdown with following values: Super Speed; Super Strength, Agility, Flight, Immortality, Invisibility, Teleportation, X-ray Vision, Telepathy and Regenerative Healing Power

2nd Lead Field: **Superhero Rating:** This field should be dropdown but not multi-dropdown with following values: 1, 2, 3, 4, 5, 6, 7, 8, 9 and 10.

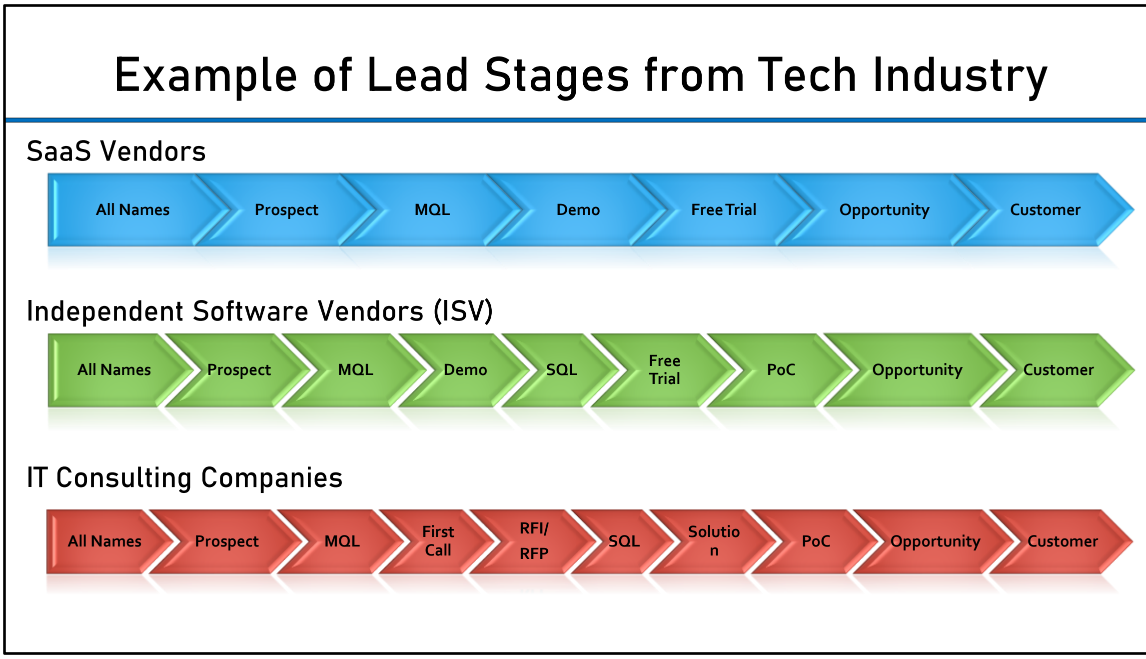
3rd Lead Field: **Credit Rating:** This field should be dropdown dependent on Superhero Rating field with following values:

- if the Superhero rating is 1 – 100, 150, 200
- if the Superhero rating is 2 – 200, 250, 300
- if the Superhero rating is 3 – 300, 350, 400
- if the Superhero rating is 4 – 400, 450, 500
- if the Superhero rating is 5 – 500, 550, 600
- if the Superhero rating is 6 – 600, 650, 700
- if the Superhero rating is 7 – 700, 750, 800
- if the Superhero rating is 8 – 800, 850, 900

- if the Superhero rating is 9 – 900, 950, 1000
- if the Superhero rating is 10 – 1000, 1050, 1100

4th Lead Field: **Superhero Name:** This field should be text.

Lead Stage



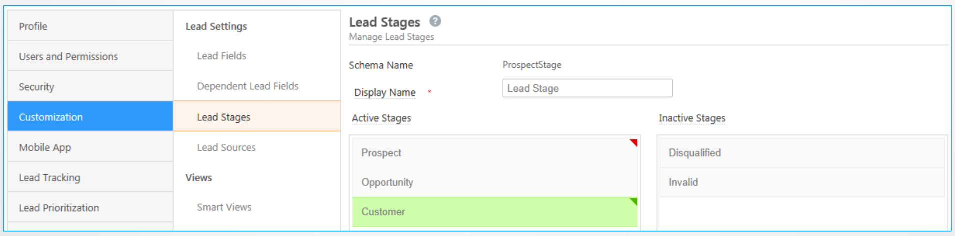
As we learned in Sales Funnel and Lifecycle Marketing concepts a consumer goes through various stages before purchasing the product/services.

Thus, it is important to identify at which stage the leads are in order to take appropriate action to convert the lead into a customer or loyal customer. LeadSquared allows you to identify the leads with standard or custom lead stages as per the client's requirement.

As the customer journey continues from one stage to another respective activities and task can be assigned automatically or manually as per the client's requirement. In above slides, you can see the typical lead stages a consumer moves in Tech Industry

Managing Lead Stages

- As a first step, Navigate to: **Settings → Leads → Lead Stages.** You would see the Stages Classified as **Active & Inactive Stages.**



- You can add, delete or rename any of the existing lead stages. Final Stage however cannot be deleted/removed

Lead Stages help you with the following:

- Keep track of Leads at various levels of Sales/Marketing Cycle/Funnel.
- Qualify Leads and move junk leads to Inactive Stages thereby refining your Leads to be worked on.
- Leads at different levels can be engaged with relevant Nurturing content and methods

By default, LeadSquared is configured with three fundamental Lead Stages:

- Prospect
- Opportunity
- Customer

Lead Stages may vary from company to company and industry to industry. Keeping this variation in mind, **LeadSquared allows you to customize and add Lead Stages relevant for your business needs**.

The **Active Stages** are linked to the **Overall Lead Funnel** available on **Administrator Dashboard.** Overall Lead Funnel shows leads in different Active Lead Stages. This helps in easy monitoring of Leads in various levels in the business process.

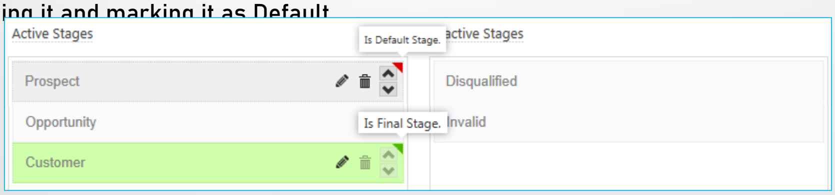
Default and Final Stage

Default Stage

- When a New Lead is created in your account by any mode (Manual or Automated) it can be attributed a **Default Stage**.
- Default Stage is tagged with a Red Indicator at the corner.
- You can set any Custom Stage as Default by editing it and marking it as Default

Final Stage

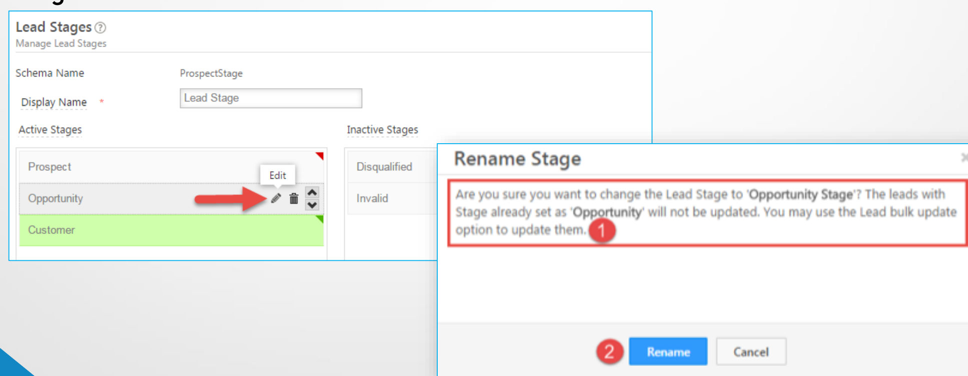
- The final stage in Sales Funnel typically corresponds to Leads that have converted to be **Customers** for your business.
- You may however Rename the Final Stage as per your business needs if required.
- Final Stage can not be deleted/Removed.



- Prospect Stage in pre-set as the Default Stage in your LeadSquared account.
- By default Final Stage is named as Customer in LeadSquared Account

Renaming Lead Stage

To rename or Modify a Lead Stage, click on Edit icon next to the lead stage name

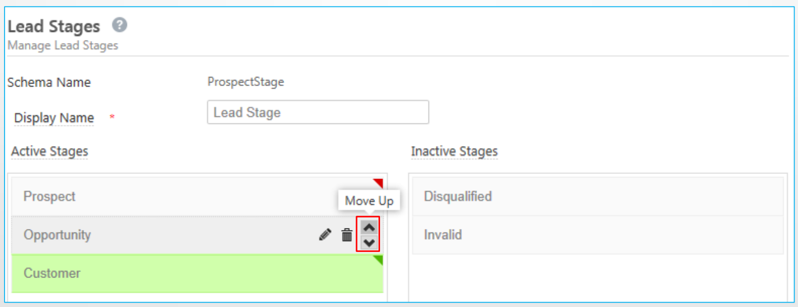


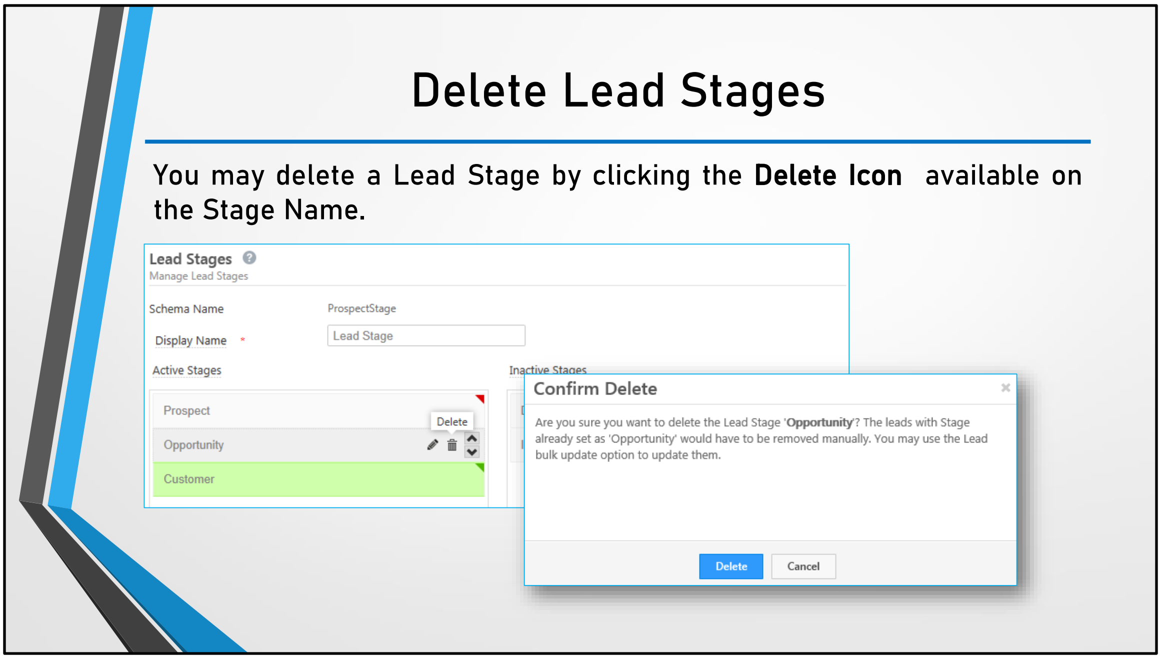
Note: Before Modifying the Stage name kindly make sure that no leads are attributed with the Stage being modified. In case the lead stage is being renamed, the existing leads which are assigned with old values will not be auto-updated. Hence, you can do lead bulk update by exporting the existing leads into excel and updating the lead stage names followed by importing it back to the system.

Reorder Lead Stages

You can **Reorder** or **Change the sequential listing** of Lead stages as per your requirement.

Stages can be moved up and down using the Up-Down icons on Each Stage as shown in the Image below.





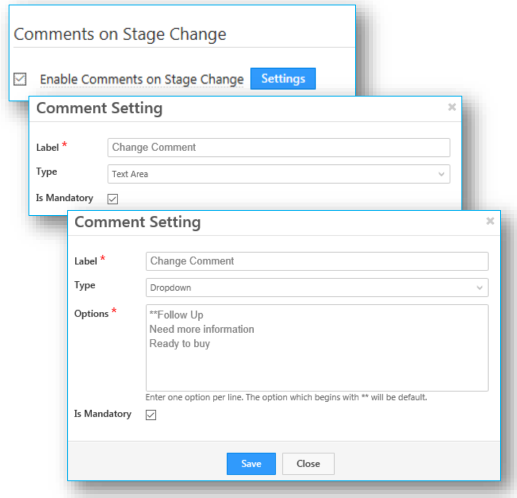
Note: Kindly make sure that No leads are associated with the Stage before deleting it.

On clicking You will see a confirmation popup where you can confirm **Delete** operation. In case the lead stage is being deleted, the existing leads which are assigned with stage being deleted will not be auto-updated. Hence, you can do lead bulk update by exporting the existing leads into excel and updating the lead stage names followed by importing it back to the system.

Comments on Stage Transition

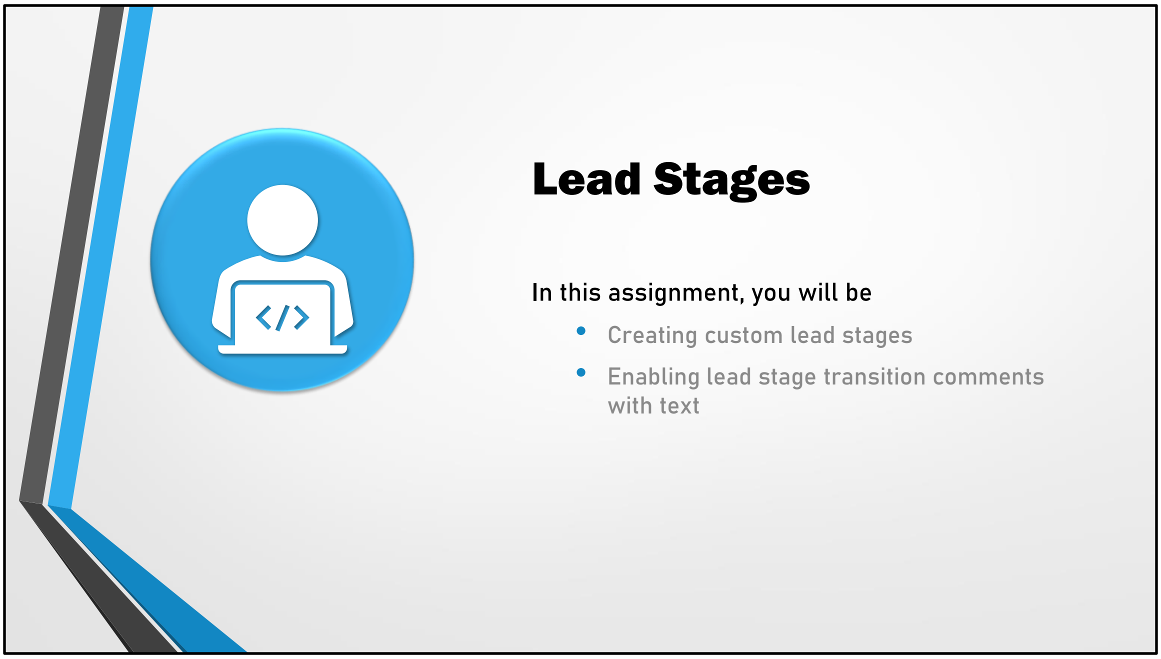
To enable comments on Stage Change → Select the **Check box** > You will see **Settings** button.

1. You may modify and specify the Label name.
2. Choose the data input type as **Text Area** or **Dropdown** for the Comments field. If you select Dropdown, you can specify the options.
3. You may make it mandatory for the Users to add a reason/comment while changing Lead's Stage.
4. Click **Save** to complete configuration.



You can enable *Comments on Stage Change* so that your Users can add a Note/Reason while changing the Lead's Stage in your Sales/Marketing Funnel.

Note: ***Change Comment*** *Field* will be seen on **Change Stage** popup while performing Lead Stage Change for a lead from Manage Leads or Lead Details page.



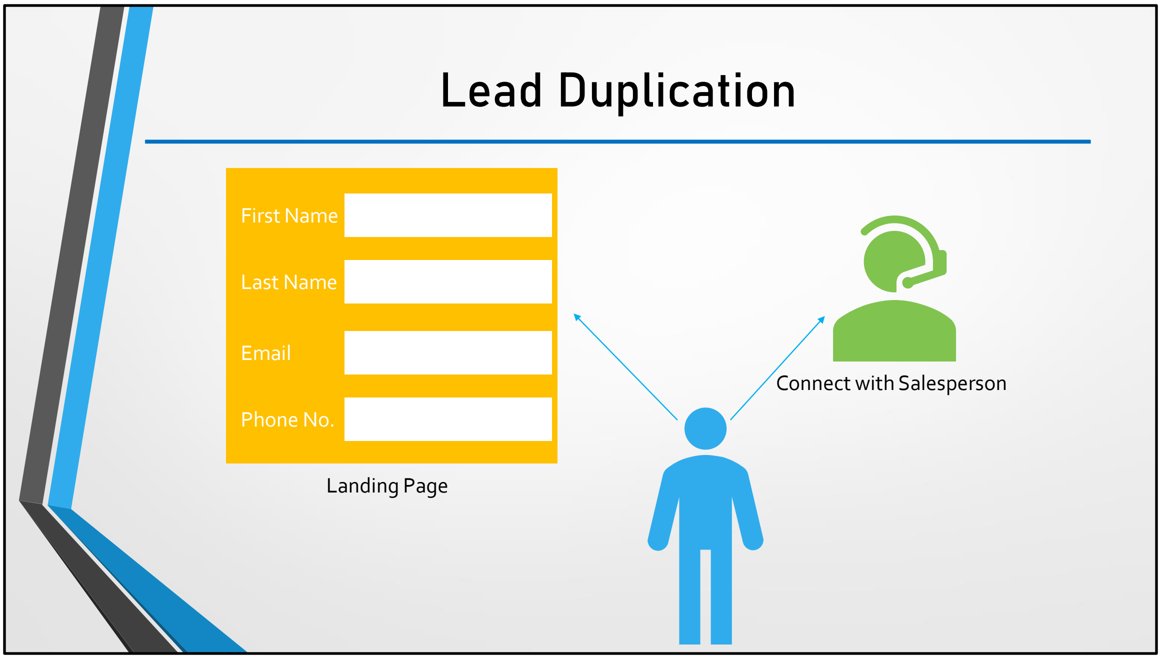
For our use case; create following lead stages:

Active Stages:
New Superheroes (Default stage)
Prospect
Opportunity
Superheroes Onboarded (Final stage)

Inactive Stages:
Villain
Disqualified
Invalid

Also, enable lead stage transition comments.

Lead Duplication

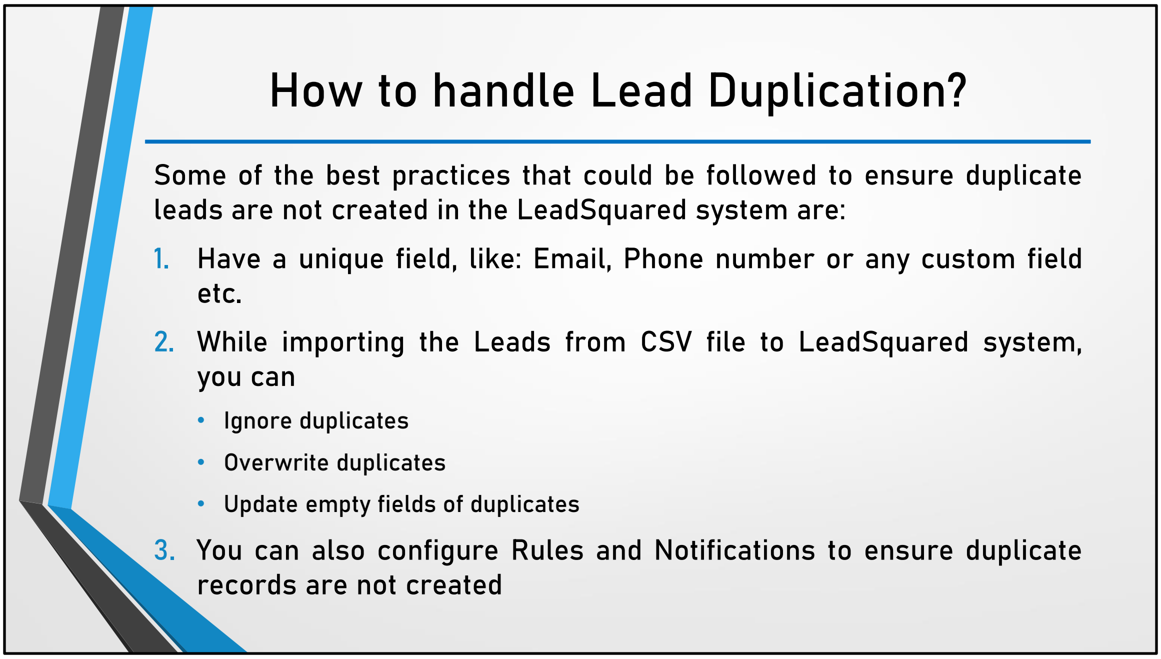


Considering Leads can be generated in many ways, lead duplication is one of the scenarios that may occur in real life, but we have ways to handle that in LeadSquared system.

For example: a user may have submitted his/her details when the sales user called and later submitted his/her details on the landing pages.

Since, LeadSquared has the provision to capture leads from phone call as well as from landing page and other channels, the details shared by the user can get duplicated unless you configure ways to counter that to ensure captured leads does not create duplicate records in the LeadSquared if already existing in the database of LeadSquared.

In coming few slides, we will see how to handle duplicate leads.



As a pre-requisite determine the unique lead field which would be validated by the LeadSquared system before adding a record into the LeadSquared database like, Email or phone number or custom lead fields like PAN number etc.

This unique field will be validated by LeadSquared system no matter from where the leads are getting generated, like Facebook plugin, Landing page or manual entry.

However, another scenario arises during Lead Import where in the CSV file is imported into the LeadSquared system. Considering the file imported may or may not contain already existing leads, system gives you a checkpoint during import asking how to handle the lead duplicates.

This could be either ignore duplicated, overwrite duplicates or update empty fields of duplicates.

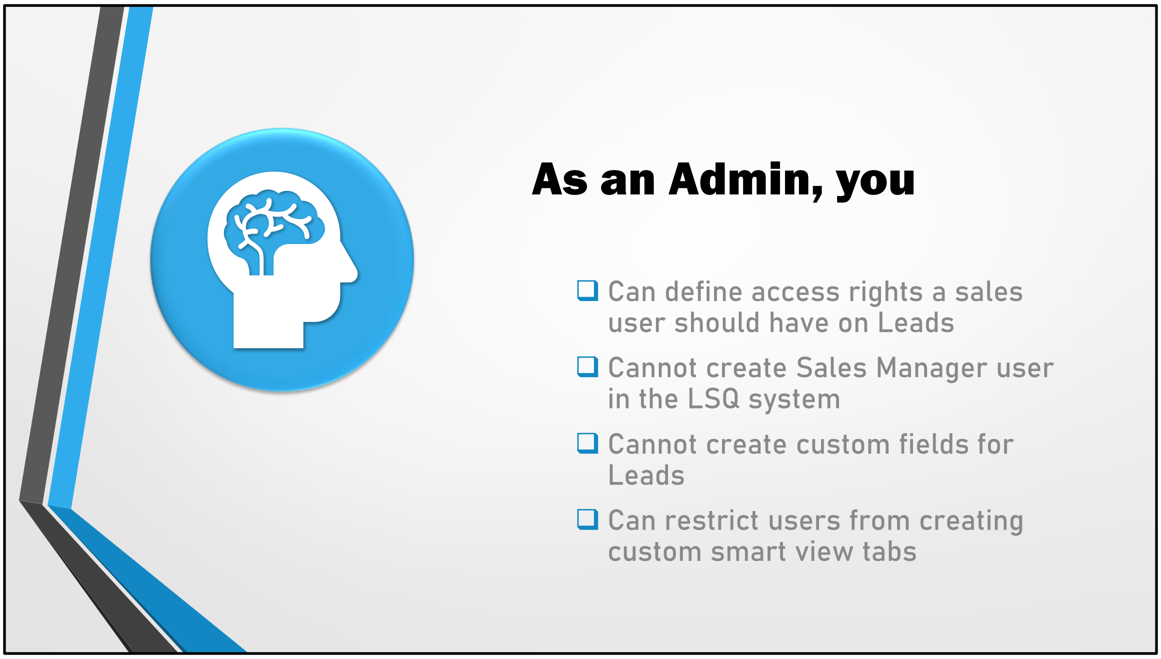
- **Ignore duplicates:** If you select this option, duplicate records will **not** be imported. This is the default option that is pre-selected.
- **Overwrite duplicates:** If you select this option, the CSV file data will overwrite the data in your LeadSquared account.

- **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.

Following link talks about how to make a custom lead field like PAN number etc as unique field: https://help.leadsquared.com/how-to-make-a-custom-field-unique-in-your-leadsquared-application/

Knowledge Check

In the coming few slides, there will be list of questions which you would be answering based on your understanding.



Answer: Can define access rights a sales user should have on Leads.

Which of the following statements are true? In Permission Set

- ❑ Delete access can be partially allowed to Leads and Activities
- ❑ Mark as complete access can be granted only for Tasks
- ❑ For Leads, Delete access cannot be partially allowed

Permission Template can be assigned to

- A user
- Sales Group
- Teams
- Roles

Workday template can be assigned to

- A user
- Teams
- Sales Group
- Roles

If you want to create the Check in – Check out for a group of user, where would you assign?

- ❑ Sales Group
- ❑ Teams
- ❑ Roles

Who can create custom fields for Sales Manager user?

- ❑ Manager of the Sales Group
- ❑ User
- ❑ Admin

Dependent lead fields can be created only between this field type...

- ❑ Text Area
- ❑ Dropdown
- ❑ Boolean and Dropdown
- ❑ Date and Time

Which of the following statements are true?

- [ ] Default lead stage is marked in Red
- [ ] Default lead stage is marked in Green
- [ ] Final stage cannot be deleted
- [ ] If a Lead Stage name is renamed, existing leads with old value will be auto-updated with new lead stage value
- [ ] If a Lead Stage is deleted, existing leads with old value will be auto-updated to default stage

During Lead Stage transition comments could be of field type?

- ❑ Text Area
- ❑ Boolean
- ❑ Date and Time
- ❑ Dropdown
- ❑ Numbers

Thank You!

You have successfully completed the 2nd Module. Please move to the next module: **LeadSquared for Sales**