

Learning Objective

This is the third module of the LeadSquared Product Training 101

In this module, we will...

- Working with Leads: Lead Capture, Lead Stages, Lead Distribution, Lead Score, Lead List and Smart Views, Lead Forms, Lead Prioritization
- Activities: System and Custom Activities for Sales
- Sales Activity
- Tasks
- List
- Forms & Process Designer
- Process Automation
- Sales Reports



Lead Capture

Ways relevant for Marketing

Capturing Leads

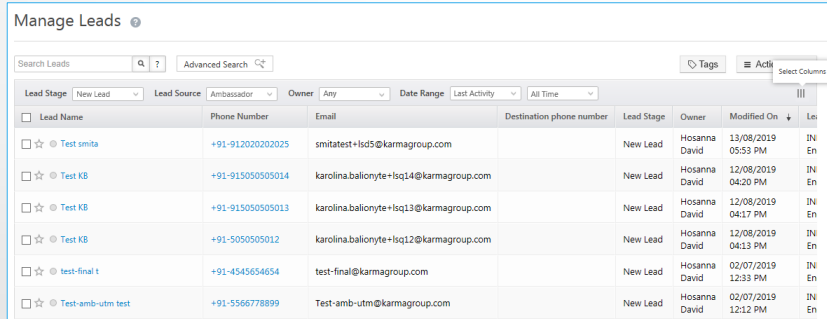




Manage Lead

Manage Leads

The *Managed Leads* window allows you to update the list of leads based on criteria defined by you



Manage Leads ⓘ

Search Leads 🔍 | Advanced Search 🔍

Tags | Actions | Select Columns

| Lead Stage | New Lead | Lead Source | Ambassador | Owner | Any | Date Range | Last Activity | All Time | |
|--------------------------|---------------------|------------------|--|--------------------------|------------|---------------|---------------------|----------|-------|
| <input type="checkbox"/> | Lead Name | Phone Number | Email | Destination phone number | Lead Stage | Owner | Modified On | | Leads |
| <input type="checkbox"/> | ☆ Test smita | +91-912020202025 | smitatest+lsd5@karmagroup.com | | New Lead | Hosanna David | 13/08/2019 05:53 PM | | IN En |
| <input type="checkbox"/> | ☆ Test KB | +91-915050505014 | karolina.balicyte+bsq14@karmagroup.com | | New Lead | Hosanna David | 12/08/2019 04:20 PM | | IN En |
| <input type="checkbox"/> | ☆ Test KB | +91-915050505013 | karolina.balicyte+bsq13@karmagroup.com | | New Lead | Hosanna David | 12/08/2019 04:17 PM | | IN En |
| <input type="checkbox"/> | ☆ Test KB | +91-5050505012 | karolina.balicyte+bsq12@karmagroup.com | | New Lead | Hosanna David | 12/08/2019 04:13 PM | | IN En |
| <input type="checkbox"/> | ☆ test-final t | +91-4545654654 | test-final@karmagroup.com | | New Lead | Hosanna David | 02/07/2019 12:33 PM | | IN En |
| <input type="checkbox"/> | ☆ Test-amb-utm test | +91-5566778899 | Test-amb-utm@karmagroup.com | | New Lead | Hosanna David | 02/07/2019 12:12 PM | | IN En |

You can also add and delete the other columns in the Manage Lead grid view by clicking on Select Columns icon.

From this page as a user, you can do following actions:

- Filter leads
- Create New Fields
- Import Leads
- Create Lead List
- Advanced Lead Search

We will cover all of them one by one in coming few slides.

Manage Leads – Advanced Search

The screenshot displays the 'Manage Leads' interface. At the top, there is a search bar with a magnifying glass icon and a red box highlighting the 'Advanced Search' link. Below the search bar, there are filters for Lead Stage, Lead Source, Owner, and Date Range. A table of leads is shown with columns: Lead Name, Phone Number, Email, Destination phone number, Lead Stage, Owner, Modified On, and Lead source. The table contains four rows of lead data. An 'Advanced Search' modal is open in the foreground, showing 'Select Search Criteria' with dropdowns for Lead Activity, Is, and Select Activity. It also has 'Add' and 'Reset' buttons. On the right side of the modal, there are radio buttons for 'Any Criteria' (selected) and 'All Criteria', and a message 'No Search Criteria is Selected'. At the bottom of the modal, there are buttons for 'Find Leads', 'Cancel', and 'Save as Quick Filter', with the 'Save as Quick Filter' button highlighted by a red box.

| Lead Name | Phone Number | Email | Destination phone number | Lead Stage | Owner | Modified On | Lead source |
|---|------------------|-------------------------------|--------------------------|------------|---------|---------------------|-------------|
| <input type="checkbox"/> ☆ Pankaj Choudhary | +91-9982105005 | paviyaassociates@gmail.com | | New Lead | System | 14/08/2019 12:36 PM | |
| <input type="checkbox"/> ☆ Aarti Shinde | +91-918097480150 | aaryashinde2822@gmail.com | | | Hosanna | 14/08/2019 | |
| <input type="checkbox"/> ☆ sangeeta vijay | +91-9819602197 | sangeeta.m1984@gmail.com | | | | | |
| <input type="checkbox"/> ☆ test smita | +91-912020202020 | smitatest+lsd7@karmagroup.com | | | | | |

While Manage Leads page allows to search leads based on four parameters combination: Lead Stage, Lead Source, Owner and Date Range

Advanced Search allows to do implement multiple criteria with and/or combination. The search criteria could also be saved as Quick Filter which allows you to access the search criteria defined immediately.

Quick Add Lead Button

Manage Leads ⓘ

Add New Lead ✕

Email ID

Last Name

Website

Notes

First Name

Phone Number

Lead Source

Save and Add New

Save and Close

Cancel

+ Quick Add Lead

+ Add New Lead

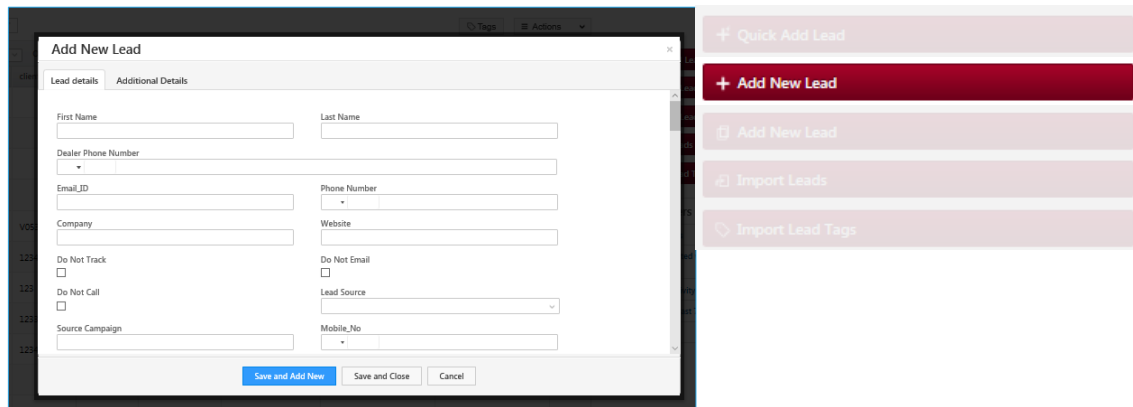
+ Add New Lead

+ Import Leads

+ Import Lead Tags

By Clicking on Quick Add Lead button, the system will open the Lead form right above the list of the leads with basic fields allowing the end users to add the leads with minimum required information.

Add New Lead from the same window



The image shows a screenshot of a web application interface. On the left, a modal window titled "Add New Lead" is open, displaying a form with two tabs: "Lead details" and "Additional Details". The "Lead details" tab is active, showing fields for First Name, Last Name, Dealer Phone Number, Email ID, Company, Phone Number, Website, Do Not Track, Do Not Call, Source Campaign, Do Not Email, Lead Source, and Mobile No. At the bottom of the modal are three buttons: "Save and Add New" (highlighted in blue), "Save and Close", and "Cancel". To the right of the modal, a sidebar contains a list of actions: "+ Quick Add Lead", "+ Add New Lead" (highlighted in red), "Add New Lead" (with a plus icon), "Import Leads" (with a plus icon), and "Import Lead Tags" (with a plus icon).

By Clicking on the highlighted button, LeadSquared system will open a pop-up window which will allow the Sales User to add leads with detailed information.

Add New Lead from new window

The screenshot displays the 'Add New Lead' interface. The form is organized into a sidebar on the left and a main content area. The sidebar includes 'Lead details' and 'Additional Details' sections. The main content area contains various input fields for lead information, including First Name, Last Name, Dealer Phone Number, Email ID, Company, Do Not Track, Do Not Call, Source Campaign, Source Medium, Job Title, Phone Number, Website, Do Not Email, Lead Source, Mobile No, Source Comment, Name, and Owner. A 'Lead Stage' dropdown is set to 'Prospect'. At the bottom of the form are buttons for 'Save', 'Save and Add New', 'Save and Exit', and 'Cancel'. To the right of the form is a vertical sidebar with buttons: '+ Quick Add Lead', '+ Add New Lead', '+ Add New Lead' (highlighted in red), 'Import Leads', and 'Import Lead Tags'.

By Clicking on the highlighted button, LeadSquared system will open a new window which will allow the Sales User to add leads with detailed information. It is like the previous action button except that it will open the add leads page in new window, thus allowing the Sales User to work with Manage Leads page at the same time as adding the new leads.

Import Leads

The screenshot displays the 'Import Leads' interface. At the top, a progress bar shows four steps: 'Select CSV file' (active), 'Map CSV fields', 'Preview', and 'Import'. Below the progress bar, the 'Select File' section includes a text input for 'Select CSV file', a 'Select File' button, and a 'Cancel' button. To the right, a sidebar contains five navigation options: 'Quick Add Lead', 'Add New Lead', 'Add New Lead' (disabled), 'Import Leads' (active, highlighted in red), and 'Import Lead Tags' (disabled).

The Import Leads button, allows the end user to import the leads from the CSV files and mapping the CSV fields with the fields in LeadSquared Lead fields. This functionality comes handy if you must bulk update to the Leads.

Import Lead Steps

Step 1: Import the CSV File

Step 2: Map the CSV file columns with LeadSquared Lead Fields and define the unique Lead fields, for ex: Email ID. If a field in your CSV file doesn't exist in your LeadSquared account, click **Create New Field** and define the field properties.

The screenshot shows the LeadSquared interface for mapping CSV columns to lead fields. Two rows are visible: 'Last Activity Date' and 'Last Name'. Each row has a 'Select' dropdown menu. A tooltip for 'Last Activity Date' says 'Create a new field if you don't have a corresponding field for this CSV column in your account'. A 'Create New Field' button is next to the 'Last Name' dropdown. An inset window titled 'Add Custom Field' shows fields for 'Display Name' (Last Name), 'Select Data type' (Text), 'Show as' (Textbox), and 'Maximum Length' (50). It also has 'Advanced Settings' link and 'Save and add new' and 'Save' buttons.

Step 3: Define how to handle the duplicate leads in the CSV file. If a CSV file contains a lead with an email address that already exists in your LeadSquared account, the lead is a duplicate. In case the Unique field is anything other than Email address then the system will define duplicacy based on that field value

Pre- Requisite: Do maintain the column names in the CSV files before importing.

Step3: Advanced Settings:

Handling of duplicated while importing CSV file:

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. The following checkboxes will also be available for selection

- Import only if valid email exists in CSV

- Do not update owner of existing leads

- Do not create new leads – this will ensure leads are only updated and no new leads are created.

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.

Uncheck the **Import only if valid email id exists in CSV** if you want to import leads with invalid email addresses as well.


Select List and Owner

- By default, the logged in user is displayed as the lead owner. You can change the lead owner from the drop-down.
- You can assign the leads to a list you've created, or you can create a new list. If you want to create a new list, enter the list name and a description.

Note: When you create a new list, it gets created as a **Static List**.

Data Formats

- You may encounter some of the following situations – When your CSV files contain date fields, example 'Contacted On', 'Followed Up On', 'Birthday', and so on, you should ensure that you've created a matching custom field in your LeadSquared account.
- If your CSV file contains a field which can be represented through a drop-down, you could create a matching custom field to map it to during the import process.
- If the CSV file contains a lead field of type 'Boolean', you can create a matching custom field and then map the information during the import process. If the field is empty then, by default it is mapped as 'NO' in LeadSquared.
 - For example, you may create a lead field for 'Valid Passport'. If a lead in your CSV file has an empty value for this column, it will get mapped as a 'No' in your LeadSquared account.
- If your CSV file contains a field for 'Do Not Email' you can map it to the 'Do Not Email' field in your account.



Lead Prioritization

Types of Scores in LeadSquared

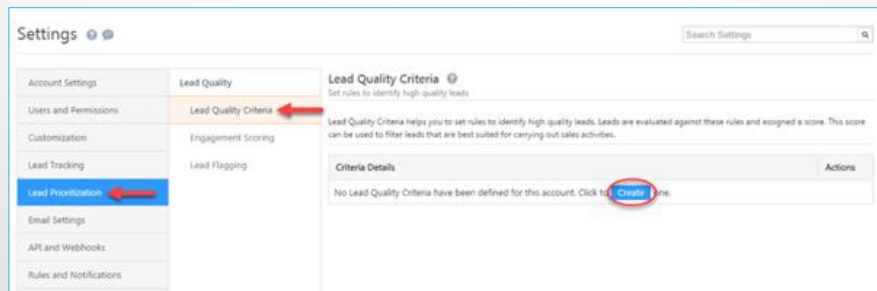
There are three types of scores in LeadSquared, each giving specific information to the users.

1. **Lead Quality Score:** Defining the quality of the leads based on certain rules relevant for business.
2. **Lead Score:** Defines the lead's performance based on different activities lead has been involved in, like email open, inbound call etc. It is applicable for all leads based on various scores defined and for entire timeframe the lead has been in the LeadSquared system.
3. **Engagement Score:** Is a sub-set of Lead Score where in conditions can be defined to gauge the engagement of the lead based on chosen Lead Stages, Timeframe and specific set of activities like Email link open, Email opened, Inbound call etc.

Lead Quality Score

Lead Quality Criteria helps you to set rules to identify high quality leads. Leads are evaluated against these rules and assigned a score. This score can be used to filter leads that are best suited for carrying out sales activities.

To setup Lead score, navigate to: Settings → Lead Prioritization → Lead Quality Criteria and click on Create











Creating Lead Quality Score Steps

Choose Lead Quality Attributes

Create Lead Quality Criteria, Step 1 of 2...

Choose the attributes of lead which can potentially define the quality of lead. You may choose to provide **different weightage for each attribute** and also indicate if **it is mandatory for an attribute to have a value** to calculate a quality score of a lead.

| Attribute | Is Mandatory | Weightage (%) | |
|-------------------------------------|--------------|---------------|---|
| City | Yes | 25 |   |
| Lead Source | Yes | 25 |   |
| Lead Stage | Yes | 25 |   |
| Do Not Email | Yes | 25 |   |
| <div>-- Add Lead Attribute --</div> | | | |
| 4 Attributes | | 100 | |

☒ Assign weightage equally across the attributes

Define Attribute Score >

Choose the attributes of lead which can potentially define the quality of lead. You may choose to provide **different weightage for each attribute** and indicate if **it is mandatory for an attribute to have a value** to calculate a quality score of a lead. If different weightage should be provided to different attributes, deselect Assign weightage equally across the attributes.

Creating Lead Quality Score Steps

Define Lead Attribute Rules

Create Lead Quality Criteria, Step 2 of 2

Provide scores to the relevant attribute values. You may choose **Has other value** to assign scores to values **out of the attribute's complete list**. Also you may choose **Rest all** to assign score to **remaining attribute values** not defined in the rule.

| Lead Source | Set Attribute Scores |
|--------------|---|
| Lead Stage | When Lead Source Is Social Media Score = 5 |
| Do Not Email | When Lead Source Is Inbound Email Score = 10 |
| | When Lead Source Is Organic Search Score = 9 |
| | When Lead Source Is Direct Traffic Score = 9 |
| | When Lead Source Is Inbound Phone call Score = 10 |
| | When Lead Source Is Pay per Click Ads Score = 8 |
| | When Lead Source Is Trade Show Score = 8 |
| | When Lead Source Is Outbound Phone call Score = 5 |

[< Back](#)[Save & Publish](#)[Save](#)

Provide scores to the relevant attribute values. You may choose **Has other value** to assign scores to values **out of the attribute's complete list**. Also you may choose **Rest all** to assign score to **remaining attribute values** not defined in the rule.

Scores can only be within the range of 0 to 10. null value can be given for attributes like Do Not Call, Do Not Email etc if the customer has opted out which makes the condition as yes.

Publish the Lead Quality Scores

The screenshot illustrates the process of publishing lead quality scores. It features three main panels:

- Lead Quality Criteria:** A panel titled "Lead Quality Criteria" with a subtitle "Set rules to identify high quality leads". It explains that leads are evaluated against these rules and assigned a score. Below this, the "Criteria Details" section shows "Unpublished Attributes : Lead Source, Lead Stage, Do Not Email" and "Published" status. The "Actions" menu includes "Edit", "Publish" (highlighted with a red box), and "Un-Publish".
- Lead Details:** A panel for "John Smith" from "Acme Consulting". It shows a "Target" of "10/10" for "Lead Quality", "1" for "Lead Score", and "1" for "Engaged". A red arrow points to the "Lead Quality" score.
- Manage Leads:** A table listing leads with columns for "Lead Name", "Last Activity Date", "Last Activity", "Modified On", "Lead Quality", and "Actions". The "Lead Quality" column shows scores of "10", "9.6", and "9.2". The "9.2" score is highlighted with a red box.

Blue arrows indicate the flow from the "Publish" button in the "Lead Quality Criteria" panel to the "Lead Quality" score in the "Lead Details" panel and the "Lead Quality" column in the "Manage Leads" table.

Note: It may take few minutes (depending on # of leads in your account and # of rules in quality score criteria) when the quality score is being computed for the first time. Once the quality scores are available, you can view it in Lead Details of the lead. See the image for reference.

Activity and Activity Score

Before we understand Engagement Scoring, it is important to understand how the scores are defined for each activity

There are two types of Activities in LeadSquared:

Core Activity

These are the activities posted by System by default. For example: Email – Link clicked, Email – Unsubscribed, Phone Call – Inbound and Lead Capture etc.

Custom Activity

These are the activities posted by the Users. For example: Site Visit, Document Collection, Call Disposition etc.

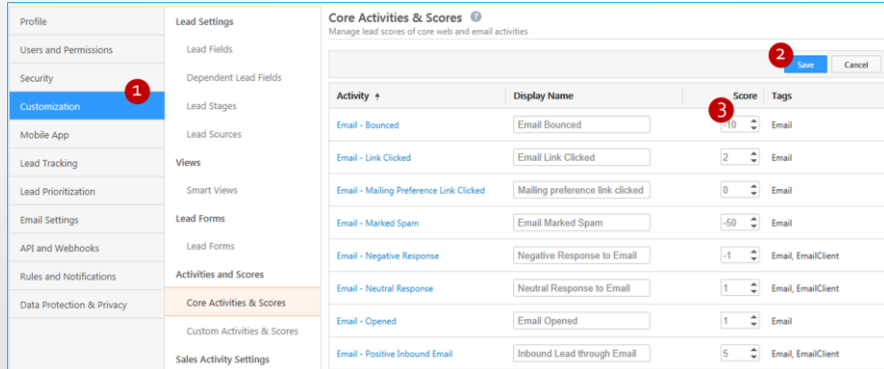
LeadSquared comes pre-built with several core or system activities like email bounced, email link clicked, website page visited, lead captured, etc. We automatically post these activities against your leads whenever they are performed. The activities then appear in the Manage Activities page or on the lead's detail page.

Note: Core Activities cannot be deleted whereas Custom Activities can be deleted or modified.

In addition to core activities, you can also create custom activities to accommodate your own unique use cases. You can also add fields within each custom activity to capture relevant data.

Defining Activity Score

Navigate to **Settings** → **Leads** → **Core Activity & Score** or **Custom Activity & Score**



Core Activities & Scores ⓘ
Manage lead scores of core web and email activities

| Activity + | Display Name | Score | Tags |
|---|---------------------------------|-------|--------------------|
| Email - Bounced | Email Bounced | -10 | Email |
| Email - Link Clicked | Email Link Clicked | 2 | Email |
| Email - Mailing Preference Link Clicked | Mailing preference link clicked | 0 | Email |
| Email - Marked Spam | Email Marked Spam | -50 | Email |
| Email - Negative Response | Negative Response to Email | -1 | Email, EmailClient |
| Email - Neutral Response | Neutral Response to Email | 1 | Email, EmailClient |
| Email - Opened | Email Opened | 1 | Email |
| Email - Positive Inbound Email | Inbound Lead through Email | 5 | Email, EmailClient |

Lead Score is a numeric value associated with a Lead which allows you to measure its relative importance over other leads in the system. It allows you to segment hot Leads from the remaining leads. Lead Score is based on Notable Activities updated against the leads. A Notable Activity is any event that is of importance in the life cycle of Lead.

When a lead performs any of the notable activity, the lead score gets automatically updated. For instance, Submission on a Landing Page may have a score of 100 associated to it. Hence when a lead submits on your landing page, the lead is automatically is updated with a score of 100.

Lead Score

Lead Score is the measure of Lead activity in response to your marketing offers.

An engaged Lead interacts with you online or offline. These interactions are essentially Lead activities with varied level of importance.



Example: An Email Open event by your Lead is important but not as important as the submission on a Landing Page. You need to capture both but as it has different levels of importance, you need to assign different values or scores.

To compare two Leads, you need to aggregate all activity scores in a given time frame. This aggregate value is called Lead Score. Lead Score tells you which leads are relatively more active than the others in a given time frame. The change (or delta) in Lead Score in a given time period (Example: day, week, month and so on) is the measure of its activity.

Benefits of Lead Score

Lead Score helps to identify and classify leads into 3 segments allowing you to focus on the business relevant set of leads.

Active & Business Relevant Leads (Positive Score)

Dormant Leads (Zero/Neutral Score over time)

Not Interested or irrelevant Leads for Business (Negative Score)

Active & Business Relevant Leads (Positive Score) – These Leads engage online or offline thereby obtaining high Lead Scores which allows you to focus your business with these leads.

Dormant Leads (Zero/Neutral Score over time) – These leads never engage with online campaigns or Email campaigns. (No email opens or link clicks or online form submission activities). These leads can be marked as Inactive and moved to Inactive Lead Stages over time.

Not Interested or irrelevant Leads for Business (Negative Score) – These leads tend to obtain a negative Score by marking the emails as SPAM or unsubscribing from Email communication. Some are marked as opted out due to invalid Email IDs resulting in Email Bounce activity.

How Lead Scoring Works?

The most important aspect of Lead Scoring is the weight you assign to each activity. It should reflect how you want to differentiate the importance of activities that happen in lead lifecycle.

Example: You may configure LeadSquared with following Lead Scores:

| Lead Activity | Score |
|-------------------------|-------|
| Email Open | 02 |
| Email Link Click | 05 |
| Webpage Visit | 02 |
| Landing Page Visit | 05 |
| Landing Page Submission | 10 |
| Phone Call | 20 |

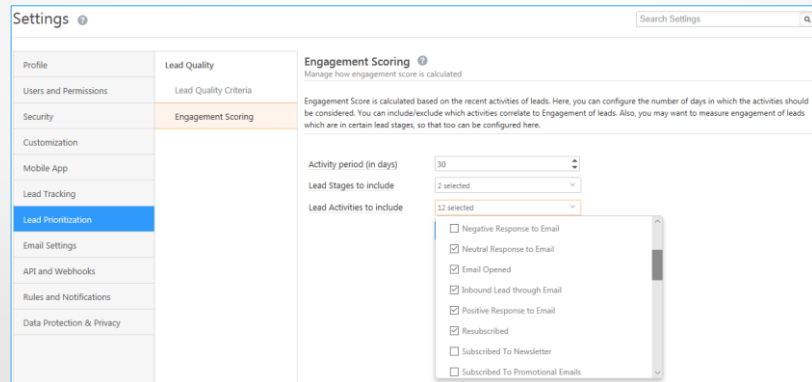
Consider you have a new business opportunity and you do an Email Campaign for it. One of the recipients (or Lead) opens the Email, clicks a links on it, comes to your Landing Page and submits. The aggregate Lead Score here is $2+5+5+10=22$.

Consider another recipient opens the Email but does not do anything immediately. The lead visits your webpage later, visits your Landing Page but does not submit. The lead makes a phone call after two business days. The aggregate Lead Score in this scenario is $2+2+5+20=29$.

Both Leads are important for you but since you configured Phone Call with a score of 20, the second lead has a higher Lead Score than the first and you can prioritize accordingly.

Engagement Scoring

"Lead Engagement Score" captures the engagement level of Leads. It is a quantifiable number that helps in finding engaged vs dis-engaged leads and comparing leads based on their relative scores.



The screenshot shows the 'Settings' page in LeadSquared. On the left is a sidebar menu with options: Profile, Users and Permissions, Security, Customization, Mobile App, Lead Tracking, Lead Prioritization (highlighted in blue), Email Settings, API and Webhooks, Rules and Notifications, and Data Protection & Privacy. The main content area is titled 'Engagement Scoring' with a subtitle 'Manage how engagement score is calculated'. Below this, there's a description: '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.' The configuration section includes three dropdowns: 'Activity period (in days)' set to 30, 'Lead Stages to include' set to 2 selected, and 'Lead Activities to include' set to 12 selected. A dropdown menu is open for 'Lead Activities to include', showing a list of activities with checkboxes: Negative Response to Email (unchecked), Neutral Response to Email (checked), Email Opened (checked), Inbound Lead through Email (checked), Positive Response to Email (checked), Resubscribed (checked), Subscribed To Newsletter (unchecked), and Subscribed To Promotional Emails (unchecked).

The definition of what constitutes Engagement is customizable in LeadSquared. To setup custom Engagement Scoring navigate to Settings → Lead Prioritization → Engagement Scoring.

You can select to which all leads it should be applicable by selecting the Lead Stages, thus, letting the system to identify the leads based on lead stage for which engagement scoring must be calculated. For example in this case 2 lead stages are selected which includes Prospect and Opportunity.

Also, you can define the engagement score should be mapped to which all activities like email link open, positive response to email etc.

Lead Score vs Engagement Score

Lead Score

- Scored based on all the activity scores defined in the system
- Applicable to all the leads irrespective of which Lead Stage they are in
- Applicable for the entire timeframe the lead is present in the LeadSquared system
- Only Activity scores must be defined to calculate the Lead Score. No other configuration is required

Engagement Score

- Calculated based on the chosen lead activity's score
- Applicable only to the leads who are mapped to chosen lead stage/s
- Engagement scoring of the leads are calculated based on the activity period defined
- Conditions to calculate engagement score must be configured apart from defining Activity scores

Activity period (in days)

Lead Stages to include

Lead Activities to include

How Lead Engagement Scoring Works?

Core Activities & Scores ⓘ
Manage lead scores of core web and email activities

| Activity + | Display Name | Score | Tags |
|---|---------------------------------|-------|-------|
| Email - Bounced | Email Bounced | -10 | Email |
| Email - Link Clicked | Email Link Clicked | 2 | Email |
| Email - Mailing Preference Link Clicked | Mailing preference link clicked | 5 | Email |

Define Activity Score

Engagement Scoring ⓘ
Manage how engagement score is calculated

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 contribute 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: 2 months

Lead Activities to include:

- ☐ Negative Response to Email
- ☐ Neutral Response to Email
- ☐ Email Opened
- ☐ Missed Lead through Email
- ☐ Positive Response to Email
- ☐ Resubscribed
- ☐ Subscribed To Newsletter
- ☐ Subscribed To Promotional Emails

Define the timeframe, Lead Stages and Activities to be considered

Lead Details ⓘ ⓘ

Activity: Off Time: Task: Sales Activity: No Tasks to do

Activity History

Include Activity Type: All activities

30 Nov 2016

30 Add to Phone Conversation

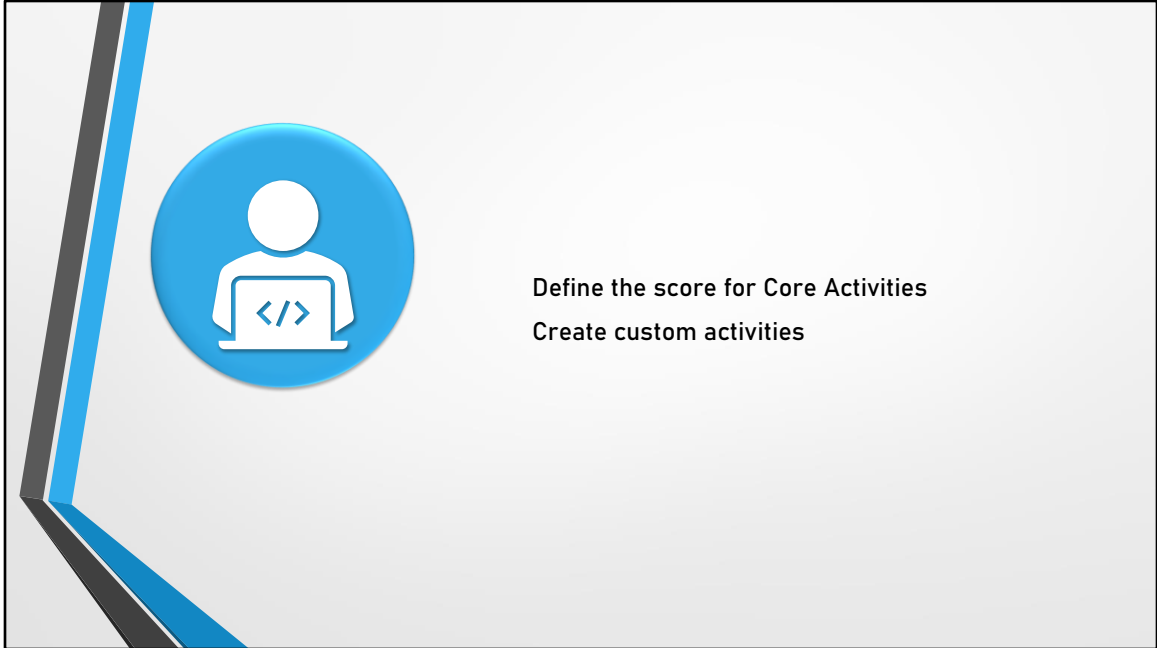
Added by: [User] on: 30 Nov 2016 04:23 PM

Lead Properties

Current: Lead Source: Lead Age: 63 Days

Lead Score is updated

System calculates Engagement Score



You can define the following scores to the following core activities:



Sales Activity

Sales Activity

Sales Activity are the types of activity which captures revenue-based information.

With Core and Custom activities one can identify if a lead was converted into a customer or not but it cannot capture the monetary value of the lead hence, Sales Activity.

You can add different products and services provided by your company at one place and track the overall revenue generated.

Sales Activity Settings

To configure, your sales activity settings navigate to **My Account → Settings → Customization → Sales Activity Settings**

Enter the new display name for sales activity. Display name entered in the field will be displayed in application for adding a sales activity.

Sales Activity Settings ⓘ
Manage your sales activity settings like currency, display name and lead stage

Display Name

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

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

The default value remains sales activity, but you can change it as per your needs like Enrollment, Registration, etc...

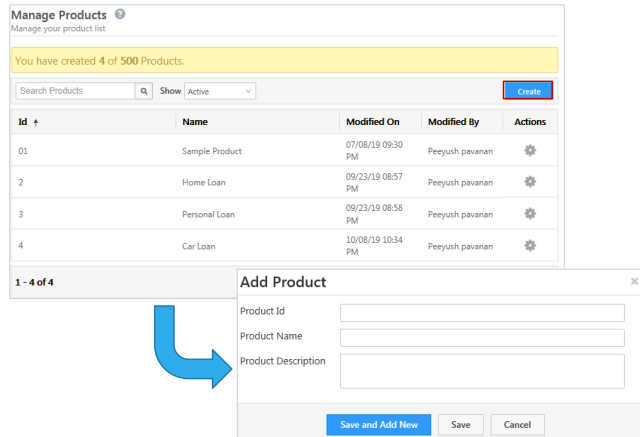
Deselect the checkbox in Sales Activity Settings as highlighted in screenshot above, if you don't want to change the existing stage of a lead to customer.

Note: Default currency can be changed from Settings → Account Settings → Company Profile.

Sales Activity - Product

Once general settings are configured, you are ready to add your products in LeadSquared.

1. Navigate to My Account → Settings → Customization → Manage Products
2. Click on **Create** button
3. Give Product Id, Product Name, and Product Description and click **Save**.



Manage Products ⓘ
Manage your product list

You have created 4 of 500 Products.

Search Products Show

| Id + | Name | Modified On | Modified By | Actions |
|------|----------------|-------------------|-----------------|----------------------------------|
| 01 | Sample Product | 07/08/19 09:30 PM | Peeyush pavanan | <input type="button" value="⚙"/> |
| 2 | Home Loan | 09/23/19 08:57 PM | Peeyush pavanan | <input type="button" value="⚙"/> |
| 3 | Personal Loan | 09/23/19 08:58 PM | Peeyush pavanan | <input type="button" value="⚙"/> |
| 4 | Car Loan | 10/08/19 10:34 PM | Peeyush pavanan | <input type="button" value="⚙"/> |

1 - 4 of 4

Add Product ✕
Product Id
Product Name
Product Description

Sales Activity - Fields

After adding products you can configure your sales activity form using Activity Fields.

In case the field type is Dropdown like Status field, click on gear icon to define the options for Dropdown.

Whether a field should be displayed in the Sales Activity form depends if the Show in form checkbox is set or not.

Sales Activity Fields ⓘ
Manage which fields you would like to capture for your sales activities

[Edit](#)

| Field Display Name | Schema Name | Type | Show In form |
|--------------------|-------------|-------------|-------------------------------------|
| Status | Status | Dropdown | Yes |
| Product | mx_Custom_1 | Product | Yes |
| Loan Value | mx_Custom_2 | Number | Yes |
| Sales Date | mx_Custom_3 | DateTime | Yes |
| Sales Owner | mx_Custom_4 | ActiveUsers | Yes |
| Notes | mx_Custom_5 | ActiveUsers | <input checked="" type="checkbox"/> |
| Custom 6 | mx_Custom_6 | String | <input type="checkbox"/> |
| Custom 7 | mx_Custom_7 | Number | <input type="checkbox"/> |

There are 4 system fields which are to be displayed as default fields in sales activity form and there are eleven custom fields which can be used as per business requirements to configure your form,

Adding Sales Activity

Sales Activity can be added from two places that are lead grid and lead details

The 'Manage Leads' interface includes a search bar, filters for Account Type, Account, Lead Stage, Lead Source, Owner, and Date Range, and a table of leads. The table has columns for Lead Name, Lead Score, Lead Stage, Owner, and Actions. Three leads are listed: Silver Surfer, Doctor Strange, and Hulk Smash, all with a score of 0 and stage of Prospect. The Actions menu for the first lead is open, showing options: Edit, Edit+, New Sales Activity (highlighted with a red box), and Add Task.

| Lead Name | Lead Score | Lead Stage | Owner | Actions |
|------------------|------------|------------|-----------------|---|
| ☆ Silver Surfer | 0 | Prospect | Peeyush pavanan | Edit, Edit+, New Sales Activity, Add Task |
| ☆ Doctor Strange | 0 | Prospect | Peeyush pavanan | |
| ☆ Hulk Smash | 0 | Prospect | Peeyush pavanan | |

The 'Lead Details' interface for 'Silver Surfer' (Prospect) shows tabs for Activity, Note, Task, Sales Activity (highlighted with a red box), Send Email, and Lead Actions. The 'Lead Details' tab is active, showing a section for 'Lead details' with a plus icon and a pencil icon.

To add a sales activity from Lead Grid navigate to Lead → Manage Leads. Click on gear icon in the lead row and click on New Sales Activity

To add a sales activity from Lead Details page, open the lead detail and click on Sales Activity button



Activity by Users Report

How to read Activity by Users Report

- This report will explain you the number of activities performed by your users .

Activities by Users

Activity Owner: 4 selected

Activity Type(s): 7 selected

Activity Time Range: Last Year

Run Report

| Owner | Met in person in Tradeshow | Had a Phone Conversation | Left a Voice Mail | Spoke with Gatekeeper | Topbar CTA button clicked | Olark Chat Conversation | SMS Sent | Total # Activities |
|-------------|----------------------------|--------------------------|-------------------|-----------------------|---------------------------|-------------------------|----------|--------------------|
| Ramprasad B | 1 | 17 | 2 | 1 | 2 | 1 | 36 | 60 |
| Vignesh LS | 0 | 6 | 1 | 0 | 0 | 0 | 0 | 7 |

LeadSquared provides powerful analytics as a part of its product. Now we have added one more report to make you understand how Activities posted by users are being counted.

Activity Owner – The users in your account who have performed an activity on the leads.

Activity Types – You can select the number of activity types that will be displayed as row headers to split the data based on the activity type as shown in the above image.

Activity Time Range – Used to filter the leads based on their activity posted date. In the above image, I have selected last year, so the report will show the number of leads on which the activity was performed.



Task Types

- You can create different task types according to the requirements of your business.

Appointments

Have a definite start and end date and time (14 November 2018 2 p.m to 4 p.m.).

Examples of appointments include meetings, webinars, demos, presentations, etc.

Show up on both the classic list and calendar views on the Manage Tasks and Smart Views pages.

To Dos

To dos don't have a specific start and end time. You can configure to dos to be completed within a certain date range (tomorrow, this week, this month, etc.) but don't have to define a specific time (2 p.m. to 4 p.m.).

Examples of to dos include follow ups on old leads, cold calls, and any task that you don't have to specify an exact time for.

Shows up on the classic list view and on the right pane in the calendar view.

For example, if you're in the real estate industry, you can create a 'Site Visit' task. If you're in the finance industry, you can create a 'Document Collection' task. You also have the flexibility to configure reminders, fields and forms for each task type.

All task types fall under 2 categories – Appointments and To Dos.

How to Create Tasks and Schedule Reminders?

- You can create tasks and schedule reminders for your sales users. The first step is to configure task types (follow-up, meeting, appointment, etc.) in your account.
- Once you've created the task types you need, navigate to the Manage Tasks page and create new tasks for your users by choosing from one of the configured task types.
- Setting a reminder for a task generates an email with the details of the upcoming task. We also send you a daily email report of all your pending tasks for the day..

Note: You can also create a task from the Smart Views page.

You can access tasks using 2 different views – The classic list view and the calendar view

The classic list view shows you a grid with details of all your tasks. You can filter by task type status, owner, and time. Both appointment and to do type tasks show up on the grid. To do type tasks will usually be at the bottom of the list

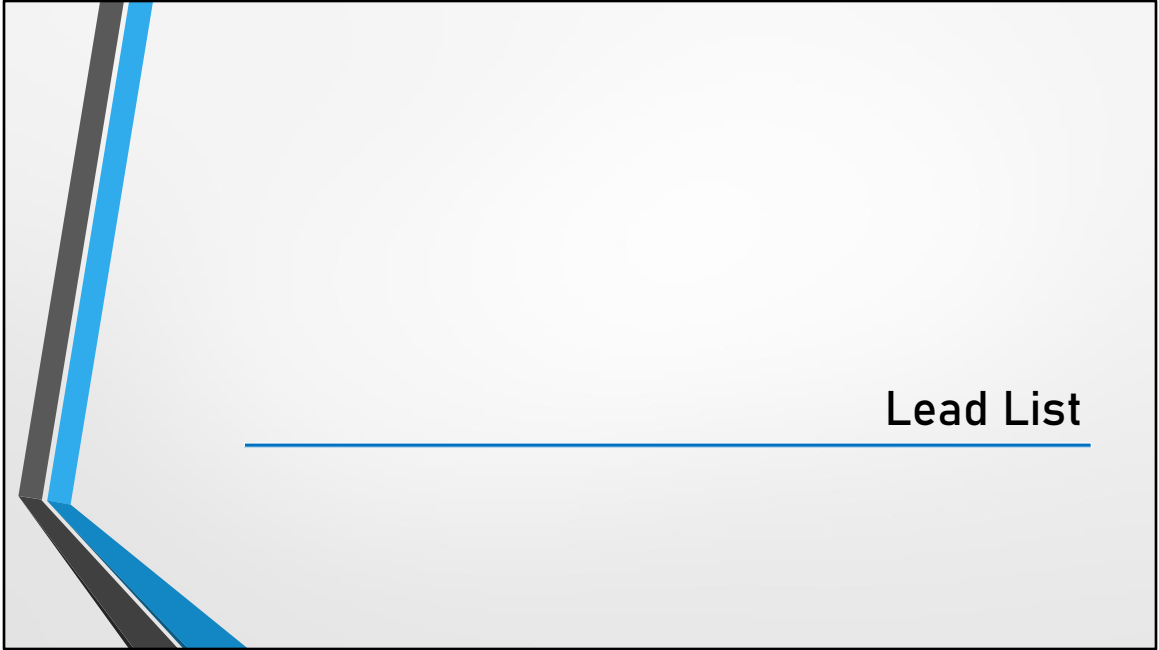
Switch to the calendar view to see your tasks as they're placed for the day, month or week.

The calendar can be viewed in different time zones.

Each user will see tasks in their own time zone. This can be configured while creating or editing a user.

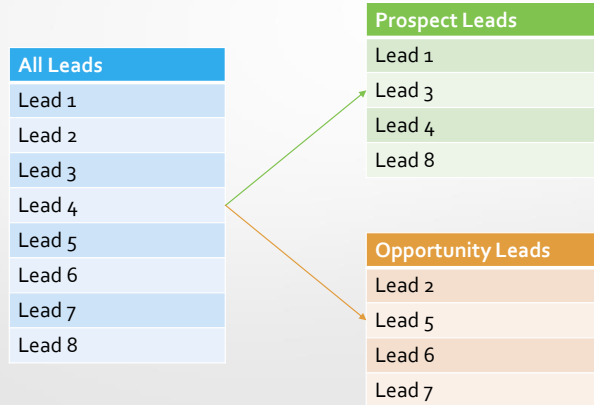
Admins can see the tasks of other sales users in either their own time zone, or in the time zone configured for the sales user. This helps schedule tasks across time-zones. Working hours are also reflected on the calendar with white slots representing

working hours and grey slots representing non-working hours –

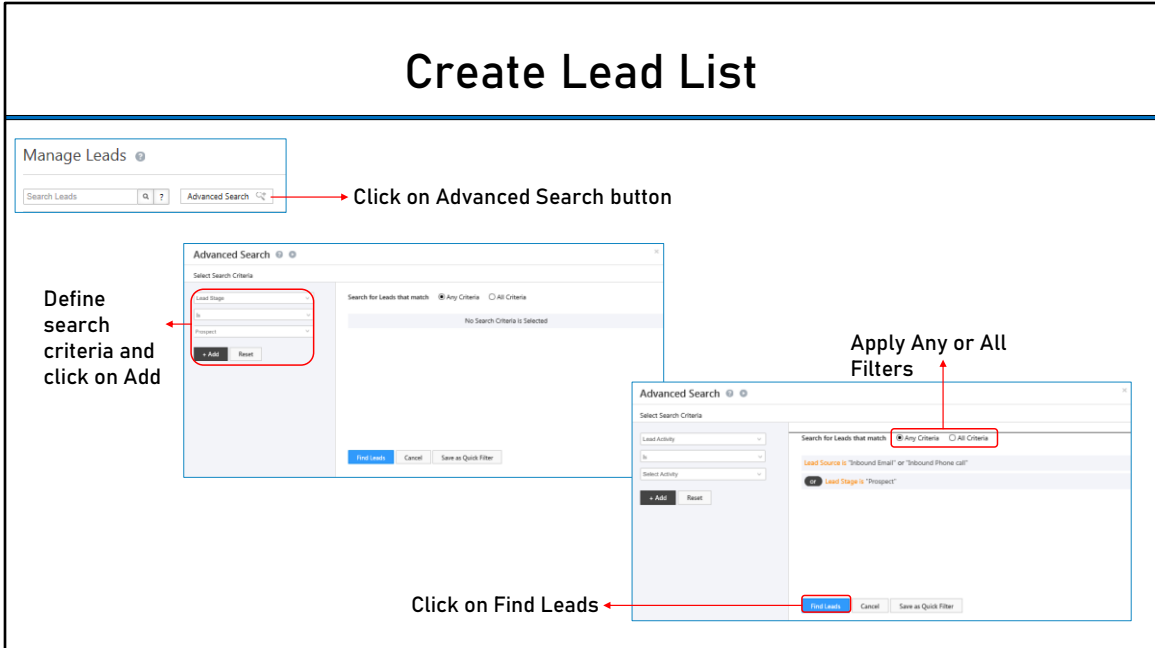


Lead List

Lead lists are a group or collection of Leads. The leads in a list match certain criteria or you can choose to put them together manually.



Create Lead List



Advanced Search button on the Manage Leads page will allow Business Admins to create a list of leads based on or multiple criteria.

1. From the Managed Leads page, click on *Advanced Search*.
2. In the following pop up screen, under Select Search Criteria, select relevant Lead field in the first drop down, define the criteria condition in the second drop down and in third drop down define the value that should be satisfied.
3. Click on Add button
4. Follow the same steps each time you want to add one more criteria.
5. Click *Any Criteria* to search for leads that match any selected search criteria. Click *All Criteria* to search for leads that match all the search criteria.
6. Once you have defined the search criteria, click on Find Leads button.

Create Lead List – Contd.

The screenshot shows the 'Manage Leads' interface. A table of leads is displayed with columns: Lead Name, Lead Source, Lead Score, client_code, Lead Stage, Owner, Modified On, Mobile No, and Phone Number. Five leads are listed, all with a score of 0 and stage of 'Prospect'. A red box highlights the first five rows of the table, with an annotation 'Select some or all the leads' pointing to it. To the right of the table, the 'Actions' dropdown menu is open, showing options like 'Export Leads', 'Bulk Update', 'Add to List', 'Add to Queue', 'Change Owner', 'Change Stage', and 'Delete'. A red box highlights the 'Add to List' option, with an annotation 'Click on Add to List' pointing to it. Below the table, a red box highlights the 'Add all 177051' checkbox, with an annotation 'Add all the leads from other pages or just the selected one in 1st page' pointing to it. Two 'Add to List' pop-up windows are shown. The first window has 'Select List' set to 'Create New List'. The second window has 'Select List' set to 'Leads from Inbound Channels' and 'List Name' set to 'Leads from Inbound Channels'. Both windows have an 'Add' button highlighted with a red box and an annotation 'Click on Add' pointing to it.

Manage Leads

Search Leads [x] [y] Advanced Search [x] Advanced search results [x] [y] [z]

Lead Stage: All Lead Source: All Owner: Any Date Range: Created On: All Time

| Lead Name | Lead Source | Lead Score | client_code | Lead Stage | Owner | Modified On | Mobile No | Phone Number |
|----------------|-------------|------------|-------------|------------|--------|-------------------|-----------|----------------|
| +91-7676292715 | | 0 | | Prospect | System | 07/28/19 04:05 PM | | +91-7676292715 |
| +91-9689120888 | | 0 | | Prospect | System | 07/28/19 04:05 PM | | +91-9689120888 |
| +91-9661196028 | | 0 | | Prospect | System | 07/28/19 03:53 PM | | +91-9661196028 |
| +91-9621139024 | | 0 | | Prospect | System | 07/28/19 03:53 PM | | |
| +91-9376800030 | | 0 | | Prospect | System | 07/28/19 03:53 PM | | |

Add to List

Select list where you want to add selected Leads

Select List: [Type to Search]

☒ Add all 177051

LiveData05Testcodes
First Test:
Leads imported on 15 Jul 2019 18:39:00 by Chandan Kumar(chandankumar@kotak.com).
TEST_05

* Automations will be triggered as per your license.

Add to List

Select list where you want to add selected Leads

Select List: [Create New List]

List Name*: Leads from Inbound Channels

Description: Leads from Inbound Email or Inbound Phone

☒ Add all 177051 leads across 7083 page(s)

* Automations will be triggered as per your license.

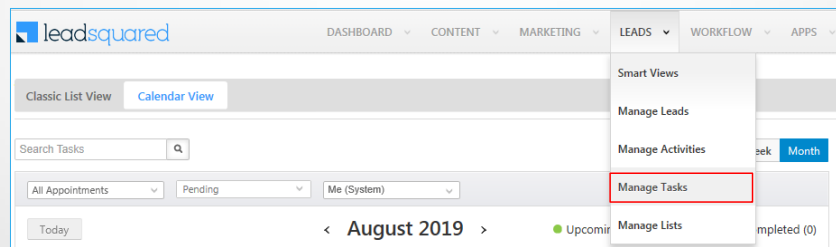
LeadSquared system will take you back to the Manage Leads page displaying the list of leads that satisfies the defined search conditions in the Advance Search.

- Once you are happy with the results, select some or all the leads and click on Actions button, select Add to List option to add the leads to a list.
- In the following pop-up window,
 - select "Create new list" in the first drop down and define the List name and Description if needed to add leads to a new list.
 - Select an existing list in the first drop down to add the leads to an existing list.

Activity List and Task List

Like Lead List, you can create activity and task list.

To access all the lists, navigate to: Leads → Manage Lists



Static List vs Dynamic List

LeadSquared allows you to create two types of lists:

- Static List
- Dynamic List

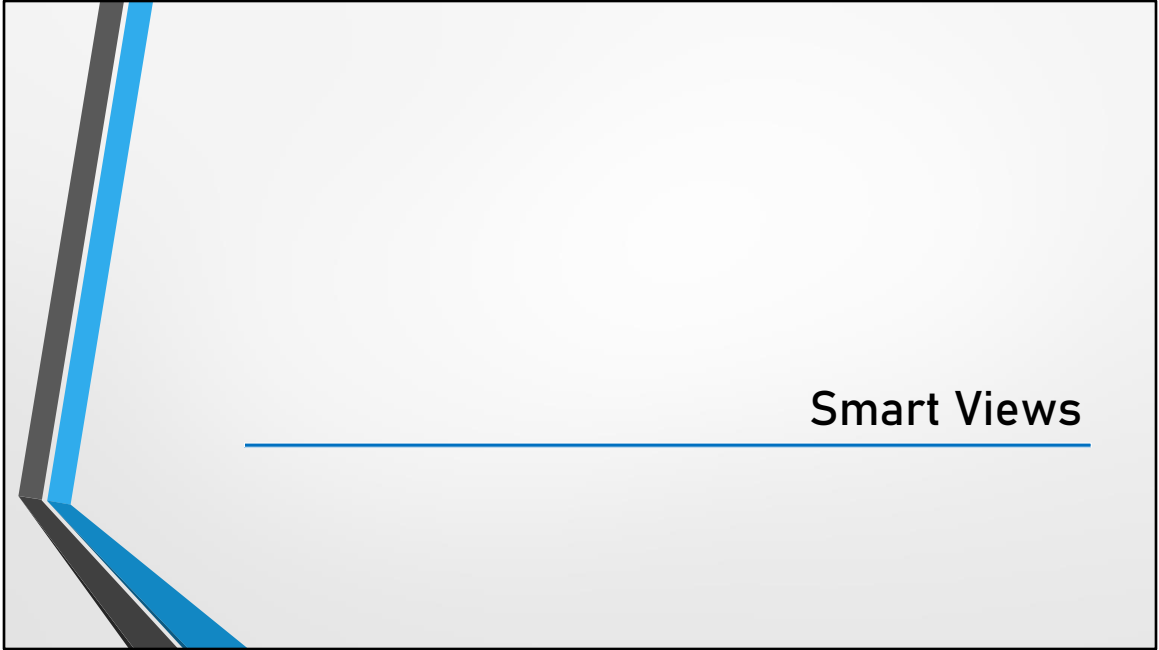
Static List has fixed number of Leads. The list can only be changed by manually deleting, adding or importing Leads.

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

Examples

A typical use case of a static list would be a list of the participants who attended a particular webinar. Creating such a list would enable you to send further documentation/communication/offers for those who attend the webinar. You create a static list for this scenario because the participants would not change for that particular webinar.

A typical use case of a dynamic list is a list of all leads from a specific geographic location. Example: Bangalore, India. Creating such a list allows you to send location specific offers or campaigns. The list is updated when the criterion of the location is met, which in this case is Bangalore, India



Smart Views

The Smart Views page allows access to accounts, leads, activities, and tasks in one place.

It's like the Advanced Search feature on the Manage Leads page, but has the following advantages –

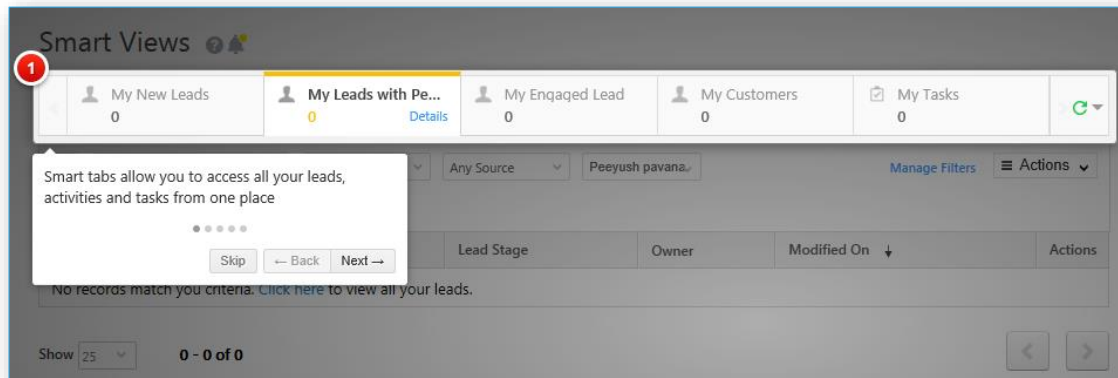
- Gives sales users a single work area for accessing accounts, leads, activities and tasks.
- Provides a better alternative to quick filters – one can view their saved filters as tabs and apply filters and sort orders per tab.
- Shows the count of leads on each tab.
- Automatically refreshes so the tabs are always updated.

You can also receive daily reports for the views you create. So if you want a daily report for new leads added, pending tasks for the day, sales tasks completed yesterday, activities posted yesterday, etc., all you need to do is set up a view and subscribe to the report (For more details, see the 'Subscribe to Smart Views Reports' section of this article).

Default Tabs from LeadSquared in Smart Views are:

1. My New Leads
2. My Leads with Pending Tasks
3. My Engaged Leads
4. My Customers

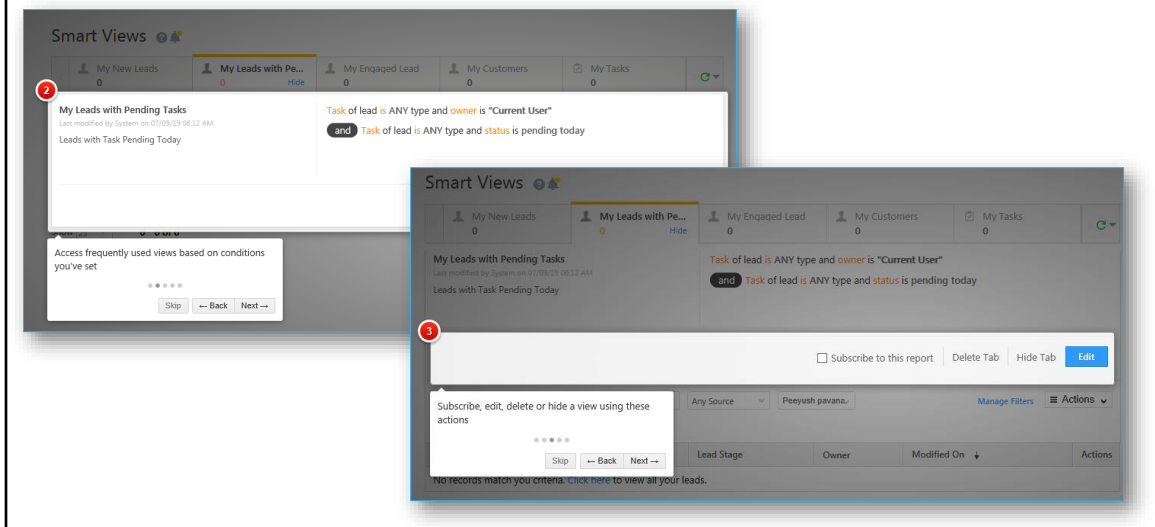
Smart Views features



Smart Views brings Lead List, Activity List and Task list along with Advanced search feature in one page. It is one of the powerful feature of LeadSquared which allows the users to manage their daily task in one screen based on their requirement. Above all, it allows the users to subscribe to reports based on Smart View individual tabs thus allows users to analyze the data as needed.

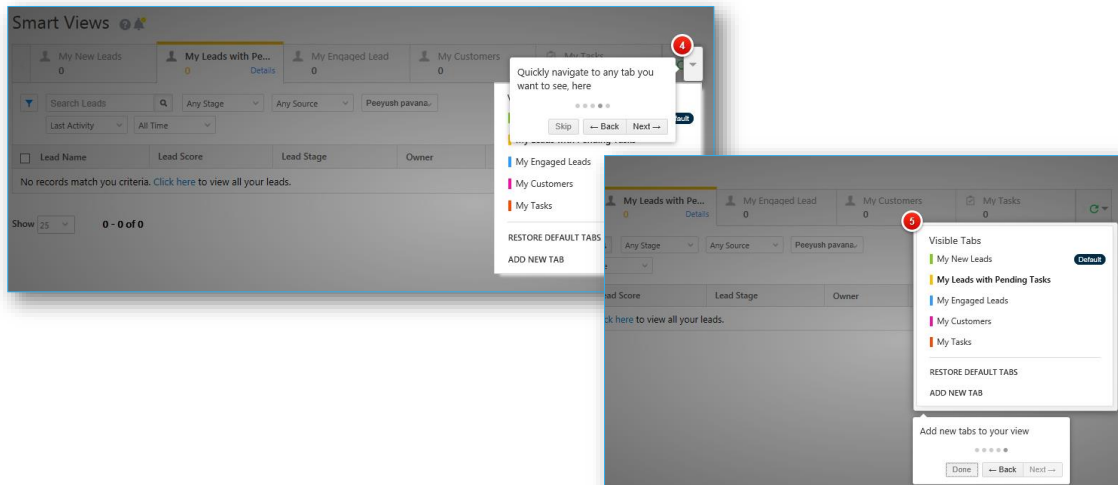
Users can search for leads and apply filters within each tab, edit the search conditions and hide or delete the tabs they don't want to see.

Smart Views – Access Conditions and Subscribe to Reports

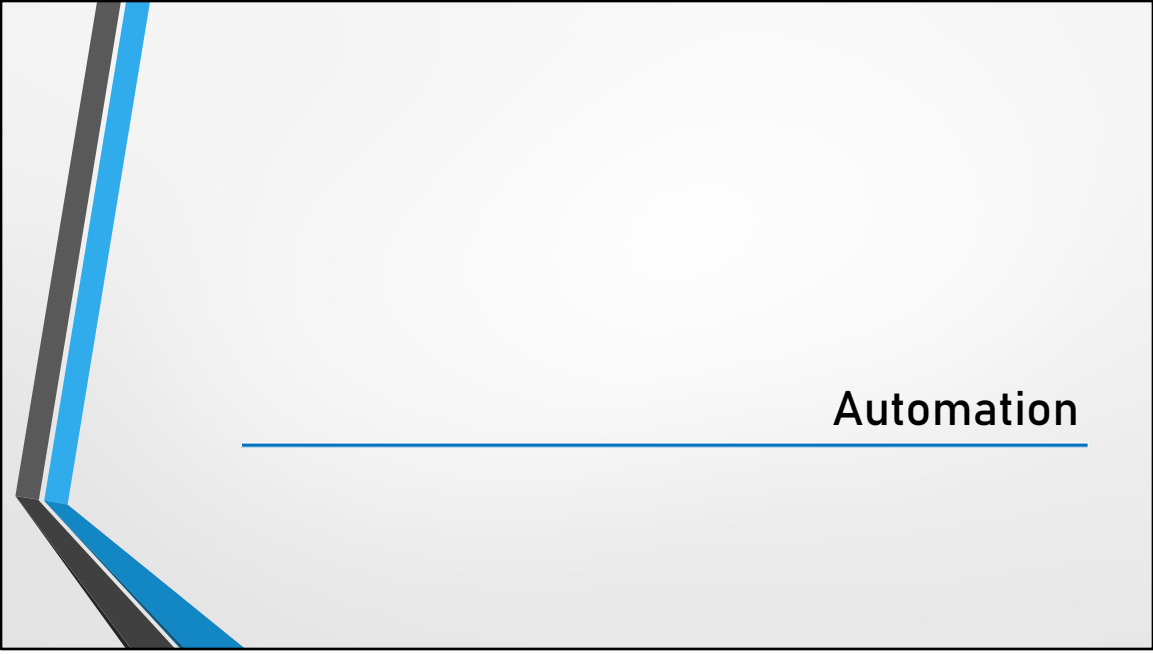


Users can subscribe to the Smart Views Daily Report that summarizes the latest accounts, leads, activities and tasks added to their smart views filters.

Smart Views – Quick Navigation and Manage Tabs



Smart Views allows user to create a new tab alongside the default tabs.



Automation

Automation - Triggers

Triggers define when the automation should be executed or initiated. In LeadSquared there are 4 trigger points which could initiate an automation. These are:

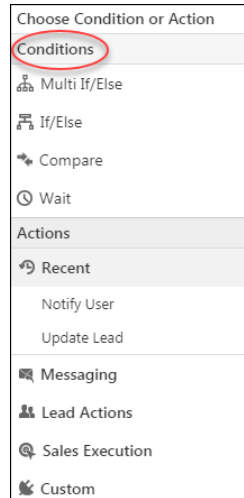
1. Lead Triggers
2. Activity Triggers
3. User Triggers
4. Task Triggers

Automation - Conditions

When a condition is met, the next step in your automation will trigger.

You can follow up a condition with an action (e.g., wait 3 days then send an email) or with more conditions (e.g., wait 3 days then check if the lead stage has changed).

The conditions you can set are 'Multi If/Else', 'If/Else', 'Compare', 'Wait', 'Wait Until Activity' and 'Split Test'.



If/Else

The If/Else condition lets you setup Yes/No criteria. It allows you to set up alternative courses of action based on whether your criteria is met or not. You can set up If/Else conditions on lead, activity and task fields.

Multi If/Else

Helps you set multiple If/Else conditions at the same level. Use the Multi If/Else condition when you have many outcomes to automate. The If/Else cards here will be aligned at the same horizontal level and the performance will be faster than using many single If/Else cards.

Compare

The 'Compare' automation action lets you compare the values of lead and activity fields and set up different courses of action based on the results. You can also use saved responses from webhooks and Lapps in your comparisons.

Wait

The wait condition lets you delay an action or condition for a specified period. A few of the many applications of this feature are listed here –

- Delay sending emails to avoid flooding a lead's inbox.
- Wait till a lead score exceeds 'x' number and then change the lead stage.
- Wait a certain amount of time to see if a lead has performed an activity (Email opened, email link clicked, etc.) and then send a follow-up email.
- Wait till a lead's stage changes from 'Opportunity' to 'Customer' and then send 'Customer-only' discount emails.
- Send email campaigns on specific occasions (birthdays, festivals, etc.).
- Wait till a sales user has sold a product and then send a thank you email.

If you are giving an Email action, you have the option to give another condition called **Wait Until**. This condition allows you to delay until an Email activity is satisfied by the Lead in order to proceed to another action.

Wait Until Activity

The 'Wait Until Activity' condition lets you wait until activities are performed before taking an action. You can choose to wait until a single activity occurs or you can set **and/or** conditions to include multiple activities.

Note: The 'Wait Until Activity' automation card **must** be followed by an action.

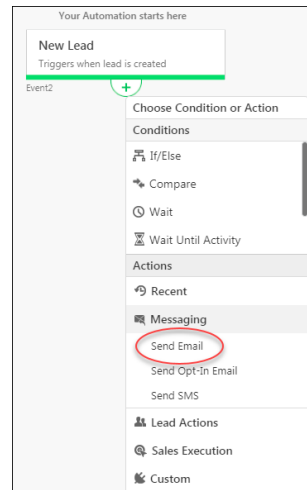
Split Test

Lets you experiment with different email content to see what your customer engage with best.

Automation Actions - Messaging

The Messaging action of Lead Automation allows to system to send an email/SMS to the leads once when the conditions are met.

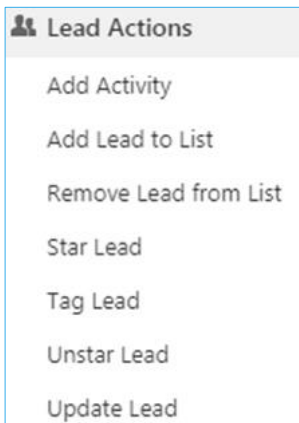
Sending SMS through automation requires you to **first install and configure an SMS connector**.



Automation Actions – Lead Actions

Following are the leads actions that system can perform as and when the conditions are met:

1. Add Activity
2. Add Lead to List
3. Remove Lead from List
4. Star Lead
5. Tag Lead
6. Unstar Lead
7. Update Lead
8. Update Activity



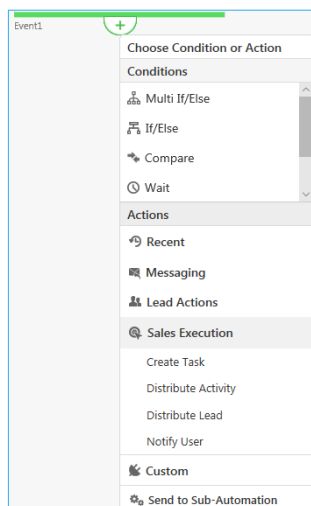
1. **Add Activity:** Allows you to add a custom activity. Click *Add Activity* and the Add Activity pop-up box appears. **Note:** If your custom activity has any associated custom field, click *Add an Additional Field* to add and select custom activity fields to associate to the activity. You can additionally add mail merge field to the selected activity type.
2. **Add Lead to List:** Allows you to add the Lead based on the previous scenario satisfied by the Lead in the workflow. Click *Add Lead to List* and the following pop-up box appear.
3. **Remove Lead from List:** Allows you to remove a Lead from a list based on the previous scenario in the Automation workflow. Click *Remove Lead from List* and the following pop-up box appears.
4. **Star Lead:** Star Lead allows you to highlight and discover Leads easily.
5. **Tag Lead:** Allows you tag a Lead. Tagging is a quick way to add a label to a lead for easy identification of Leads.

6. **Unstar Lead:** Allows you to unstar or unmark a Lead as important.
7. **Update Lead:** Allows you to update the Lead field values with new values if required. Here as an example, the Lead Stage is given as Opportunity and Notes is also updated. These Lead fields are updated with these values if the Lead satisfies the criteria you have specified.
8. **Update Activity:** If you have selected an activity based trigger (New activity on lead or Activity update on lead), you an additional lead action, *Update Activity*, will appear under the lead actions menu. This functionality lets you automatically update any field created under that activity.
 - Let's say you triggered your automation with a 'New Activity on Lead' and set that new activity as a 'Meeting'. You can now use the *Update Activity* option to automatically update any fields created under the meeting activity.
 - Say you want to update the 'Notes' field of the meeting to say 'Done with Meeting', just click the *Update Activity* option, select the 'Notes' field and add the value 'Done with Meeting'. You can also add additional activity fields using the *Add Activity Fields* link

Automation Action – Sales Execution

The Actions under Sales Execution of Automation handles the following output:

- Create Task
- Distribute Activity
- Distribute Lead
- Notify User



Notify User: Allows you to send a notification Email to a LeadSquared user. By default, the notification is directed to the lead owner. You can add more LeadSquared users to the 'To' field. You can also direct the notification to the activity owner or include the activity owner in the 'Cc' or 'Bcc' fields. You can also mail merge lead fields, owner fields, sender fields and activity fields into your email content using the mail merge option

Create Tasks: Allows you to create both appointment and to-do type tasks. **Note:** You can mail merge lead and activity fields in the subject and description of the task. You can also schedule the task to be created using date-time fields from an activity (only for automations with activity triggers).

Distribute Leads: The distribute lead action allows you to set conditions to distribute leads among your users. As an example, let's say you want to distribute all leads from a certain city to specific users. Click the **Distribute Lead** action to open the **Distribute Lead** pop-up window. Enter a rule name in the space provided and then click the **choose conditions(s)** link.

On the **Select Criteria** pop up, choose the lead field as **City** and then enter **Bangalore**.

Next, click **Add Condition**. Now select one of the following options from the drop-down

- **Users** – Select users to distribute the leads to.
- **Sales Groups** – Select the group you want to distribute leads to.
- **User Properties** – Perform an advanced search based on user attributes.

While distributing leads to users, You'll see an **Availability Status** section at the bottom if you've enabled the Check In and Check Out feature for user management. You can toggle the between the **All** and **Available** options to distribute leads to all users or to available users only.

You can proceed to add multiple rules by using the **New Rule** link. You can name each rule and then re-order them by simply dragging and dropping. The rules will execute in the sequence you set up.

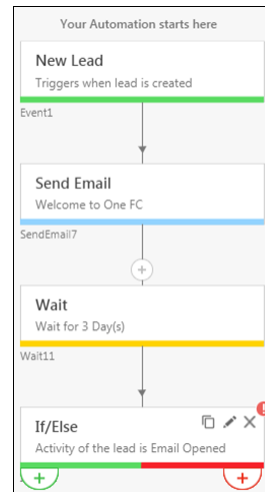
You must set a default rule that will execute when no other rules match the set criteria. The default rule will automatically distribute the lead to a user you select.

Note: If you've chosen the **Available** users option and the user is not available, the lead will be distributed to the user specified in your default rule.

Automation Action – Send to Sub-Automation

Use it to –

1. Keep your main automation brief and simple by sending additional steps to a sub-automation.
2. Re-use a standard sequence of steps across different automations.
3. Build a large network of automations without running out of automation cards/nodes (Only 50 nodes are allowed in a single automation).



Example:

You're sending out an email to all new leads. You want to follow one long course of action (Flow A) for leads that open your email and another (Flow B) for those that don't.

Before you branch out into Flow A or B, your automation may look something like the screenshot given above.

The green + icon under the If/Else automation card will branch out into Flow A, your positive flow for the leads who opened your email.

The red + icon will branch out into Flow B, the negative flow for leads who didn't open the email.

The sub-automation feature now lets you send both flows (A and B) to separate sub-automations and keep your parent automation clean. What's more, you can re-use Flow A and B across any new automations you create.

Points to Remember

- Only published sub-automations will show up in the Send to Sub-Automation pop-up. You can send your main automation to any sub-automation you published previously.
- You can create sub-automations to a maximum of three levels (Main

Automation>Sub 1>Sub 2>Sub 3).

- You can create up to 500 sub-automations.

Automation Action – Custom (Webhook)

Use webhooks to automatically post activities to a URL of your choosing.

The screenshot shows a configuration window titled 'Webhook - PostWebhook59'. It contains the following fields and options:

- Name:** A text input field containing 'Sample'.
- URL:** A text input field with a dropdown menu showing 'http://'. To the right is a 'Verify' button with a warning icon.
- Content Type:** A dropdown menu showing 'application/json'.
- Save Response:** Two buttons, 'Yes' (highlighted in blue) and 'No'.
- Response Format:** A note stating 'This response will be saved as "PostWebhook59_Response" under Dynamic Responses'. Below it are two radio buttons: 'As plain text' and 'As JSON data' (which is selected).
- Custom Headers:** A section with a '+ Add' link.
- Notify on failure:** A dropdown menu showing 'Type to Search'.
- Retry Count:** A spinner box set to '1'.
- Include Latest Data:** A checked checkbox.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

Note: The latest data generated using the webhook is the data retrieved just before the execution of the action you specify in the automation.

Name: Enter any name for the webhook.

URL: Enter the URL you want to post the data to.

Content Type: Choose the format you want the data to be posted in.

Save Response: Allows you to save the response from a webhook and use it to send dynamic email content or in other automation actions.

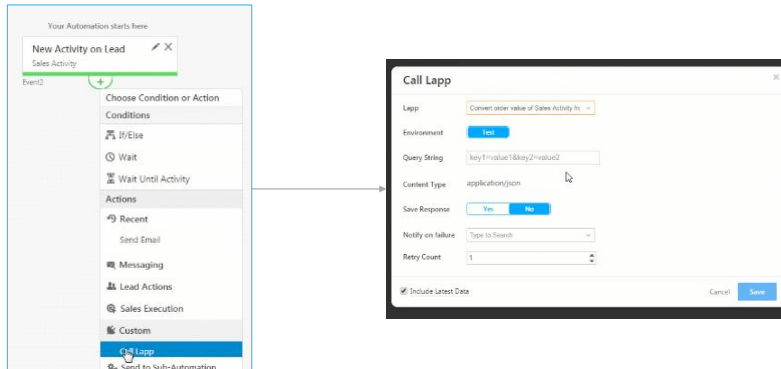
Custom Headers: For security purposes, you can choose to enter a custom name-value pair in the webhook header and then reject all webhook calls where this header isn't present.

Notify on Failure: Get notified every time a webhook fails.


Retry Count: The number of times you want to retry on failure.

Automation Action – Custom (LApps)

After publishing a Lapp to any environment (test or live), you can call it using LeadSquared Automation.



After publishing a Lapp to any environment (test or live), you can call it using LeadSquared Automation.



Automation for Marketing



Drip Marketing via Automation

Drip Marketing

Drip Marketing is any marketing communication broken down into bits and spread across an extended period to gently nudge the prospect to take an action, instead of selling point-blank.

The mark of a good drip email campaign is the prospect not even realizing that it's a pre-written, automated email. It should delight your recipients and make them think that it was written only for them.

Objective of Drip Marketing is not to sell the product in the first few interactions but to nurture the leads and help him reach the final stage.

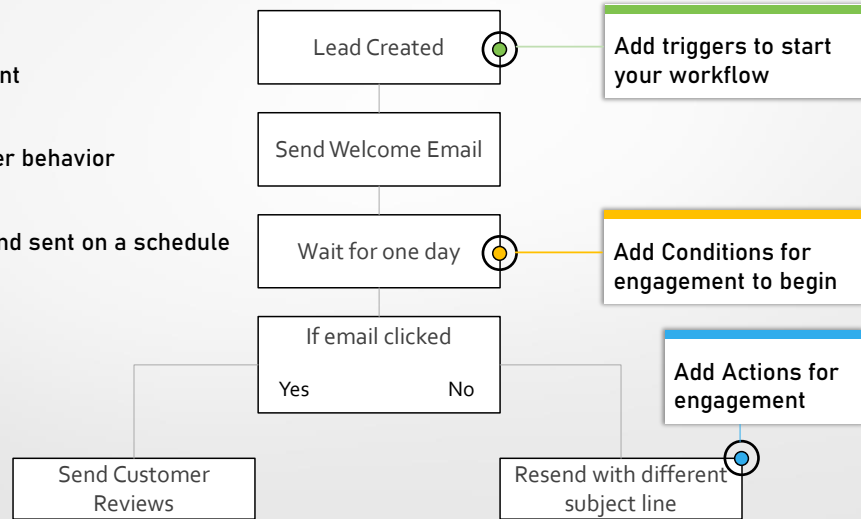
Features and key elements of Drip Marketing


Features

- It is super relevant
- It is personalized
- It is based on user behavior
- It is pre-written
- It is automated and sent on a schedule

Key Elements

- Triggers
- Conditions
- Actions

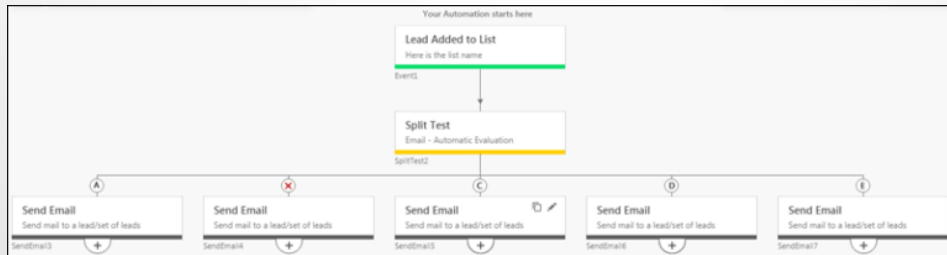




Split Testing/A-B Testing via Automation

Lead Automation Conditions – Split Test

- A split test lets you experiment with different email content and find what works best for your automation.



You can try out different subject lines, senders, etc. and see how your leads are responding. Based on the responses you can either manually or automatically select the best email to use going forward. Lead Automation Conditions – Split Test

Split Test – Use Case

- Let's say your marketing team produced two different subject line for same email but unsure which will get them more traction either in terms of highest email open or highest number of links clicked in the email. Will it be?
 - "Hey, we're so glad you signed up" or
 - "Welcome to the <my organization> family!".

With split test, you can send 2 emails (one with each subject line) to your leads and analyze which one receives more opens/clicks. Based on these results, you can select one of the emails as the 'winner'. All new leads entering the automation will now only receive the email you chose as the 'winner'.

Split Test – How it works?

- As described in the example use case section, a split test lets you send multiple emails and determine a winner based on how your leads respond.
- There are two way to determine the winner:

Automatic Split Test

The winner is decided automatically by the system based on the number of email opens or clicks after a specified number of hours/days/weeks.

If the number of clicks/opens are equal after the specified time, a user will have to manually choose a winner from the automation report.

Manual Split Test

The winner must be determined manually from the automation report after the specified number of hours/days/weeks.

The specified user(s) will receive a notification to manually select a winner after the configured period has elapsed

Prerequisites




The split test feature is only available on select plans. If you want it enabled for your account, contact us at support@leadsquared.com.

Note: These emails are sent to your leads in round robin fashion until a winner is determined.


Once an email is selected as the winner (automatically or manually), it'll be sent to all leads entering the automation from that point onward.

Note: You can test up to 5 different emails.

Setting Up a Split Test

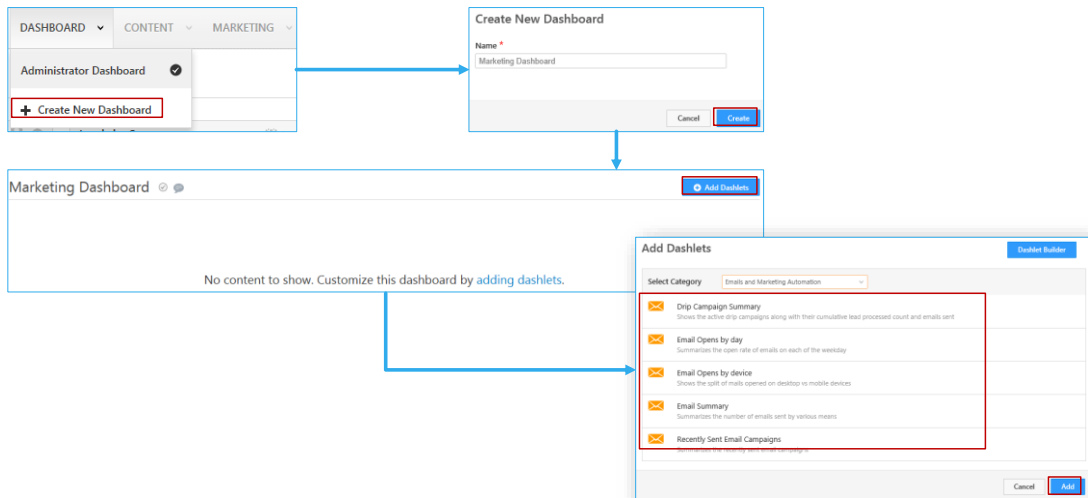
- Select an automation trigger
- At any point after selecting a trigger, click the expand  icon under any automation card and choose the **Split Test** condition
- On the **Configure Split Test** pop-up, choose whether you want to determine the winner automatically or manually.
- Click **Save**.
- To add more emails to your split test, click the add  icon under the split test card.
- Click the **Edit**  icon on each **Send Email** card to set the email content.
- After you're done, click **Publish** on the top right corner of your screen to publish the automation.

1. If you select the **automatically** option, choose whether you want to determine the winner based on the number of email opens or clicks. Next, set the number of hours/days/weeks you want the winner to be determined after. Finally, select the users you want to notify once a winner is determined.
2. If you select the **manually** option, choose the user(s) you want to notify to select a winner. Then set the number of hours/days/weeks you want to wait for before you allow users to select the winner.



Sales Reports and Dashboards

Creating Dashboard and Adding Dashlets



Sales Reports



Field Sales Tracking (3)
Reports to help track field sales team



Large Exportable Reports (9)
List of reports with large data sets that you can export and receive through email



Lead Insights (26)
These reports give you insight on your lead data across various attributes and time periods



Lead Source Analysis (9)
Helps you analyze lead submission and capture sources



Lead Stage Analysis (10)
Helps you analyze data by Lead Stages



Sales and Revenue (4)
Revenue performance analytics - find revenue generated by User, Source, Geography and other parameters




Sales Group-Wise Analysis (18)
Analyze sales user performance and get lead insights by Sales Groups



Telephony and SMS (5)
These give you statistics and reports on your telephony and SMS usage and trends

These are some of the pre-defined sales reports LeadSquared provide. For custom reports, contact us.



Thank You!

You have successfully completed the 4th module of the LeadSquared
Foundation Course.