

Learning Objective

This module covers the features of LeadSquared Mobile App

In this module, we will be covering...

- Advantages of Mobile Application
- Permissions
- Task and Activity Completion
- Mobile Navigation
- Leads Near Me
- Day Plan Feature
- Customize Lead Card



Mobile Application



Leadsquared Mobile Application

Delivers a full **CRM** experience on smartphones, tablets, and other internet-enabled devices.

It enables sales, marketing and customer service teams to access

and manage key information in real time, wherever they are



Advantages of Mobile Application

- Get automated day plans
- Get meeting recommendations
- Give intelligent up/ cross-sell signals
- Know what your agents are doing
- Geo-fence their tasks
- Know the location history for your team

Get automated day plans

Let LeadSquared plan your agents' day for them. Right from the number of meetings scheduled, the goals for the day, and the best travel route – everything is designed for them, automatically.

Get meeting recommendations

Based on the agent's location, the mobile app will identify leads nearby. Your agents can then drop in for a quick meeting or follow-up.

Give intelligent up/ cross-sell signals

The tool can use the customer's activity history to look for possible upsell or cross-sell opportunities and recommend sales actions to your agent

Know what your agents are doing

Track all their calls and messages that they receive on their mobile device and analyze their overall productivity. Use their meeting history to know if they are meeting their targets.

Geo-fence their tasks

LeadSquared will not allow your agents to complete their tasks or meetings if they are not in the correct location. This reduces falsified meeting logs.

Know the location history for your team

Get complete geo reporting of all the meetings and tasks. Know how many meetings have happened, the distance traveled, and even the locations of every meeting.



Permissions

Permissions

Set permissions for the Leadsquared mobile app

configure behavior for offline leads/activities/tasks/smart views

Set call, SMS and location tracking permissions for different user roles



Prerequisites

- You must be an Administrator user of your LeadSquared account.
- Your users must have the LeadSquared mobile app installed on their devices.

Mobile App Permission Setting

The Mobile App Permissions page is available under My Account → Settings → Mobile App → Permissions. Click on Edit to set Permission for each Feature.

Settings

Profile

Users and Permissions

Customization

Mobile App

Lead Tracking

Lead Prioritization

Email Settings

API and Webhooks

Rules and Notifications

Data Protection & Privacy

Mobile App

Permissions

Task & Activity Completion

Mobile Navigation

Permissions

Manage mobile app permissions

Note on offline settings : Roles where offline access is not allowed, its sub-settings will not be effective.

Permissions

Administrator

Marketing User

Sales Manager

Sales User

Offline Leads

Allow access	Yes	No	Yes	Yes
No. of leads allowed	100	100	100	100
Override Data	Ignore	Ignore	Ignore	Override
Override settings on device	No	No	No	No

Offline Activities

Understanding Each Setting

Section	Setting	Description
Offline Leads	Allow Access	Allows the user role access to the offline leads feature
	No. of leads allowed	The number of leads displayed to the user role while offline.
	Overwrite Data	Allows a user role to Ignore or Overwrite information of leads created in offline mode.
	Override settings on device	Gives the user role permission to override these settings from the mobile app.

Understanding Each Setting

Section	Setting	Description
Offline Activities, Offline Tasks	Allow Access	Allows the user role access to the offline activities and offline tasks features..
	Date Range	The date range within which activities and/or tasks should be displayed while offline.
	Overwrite Data	Allows a user role to Ignore or Overwrite information of activities/tasks created in offline mode.
	Override settings on device	Gives the user role permission to override these settings from the mobile app.

Understanding Each Setting

Section	Setting	Description
Offline Smart Views	Allow Access	Allows the user role access to the offline smart views' features
	No. of records per tab	The number of lead/activity/task records to display per smart view tab while offline.
	Overwrite Data	Allows a user role to Ignore or Overwrite information of smart view tabs created in offline mode.
	Override settings on device	Gives the user role permission to override these settings from the mobile app.

Understanding Each Setting

Section	Setting	Description
Calls and SMS	Track Calls	Posts inbound and outbound phone calls to leads from the user role's device as activities in LeadSquared.
	Record Calls	Allows you to record the inbound or outbound calls from/to leads.
	Track SMS	Tracks SMS made to or received from leads as activities in LeadSquared.
	Override settings on device	Gives the user role permission to override these settings from the mobile app.



Task and Activity Completion

Automatically post activities every time a task is completed

Mobile App Setting for Task and Completion


1. Navigate to the Task & Activity Completion tab.
2. Click the edit icon under the Actions column, alongside any task type.
3. Under the Activity Associated column, select the activity you want to post when the task type is completed
4. Alongside the Actions column, click the save icon

Settings

Search Settings

Profile	Mobile App	Task & Activity Completion
Users and Permissions	Permissions	Associate the activity to be posted when the task is marked as completed
Customization	Task & Activity Completion	
Mobile App	Mobile Navigation	
Lead Tracking		
Lead Prioritization		
Email Settings		
API and Webhooks		
Rules and Notifications		

Task type	Activity Associated	Modified By	Actions
Demo	Type to Search		✎ ✕
Follow-Up	Chat Conversation		✎
	Document Collection		✎
Meeting	Email Received	Vir Singh	✎
	Email Sent		✎
Phone Call	Example Custom Activity		✎
Proposal	Had a Phone Conversation		✎
	Home Visit		✎
	Left a Voice Mail		✎
Revive Old Lead	Meeting		✎

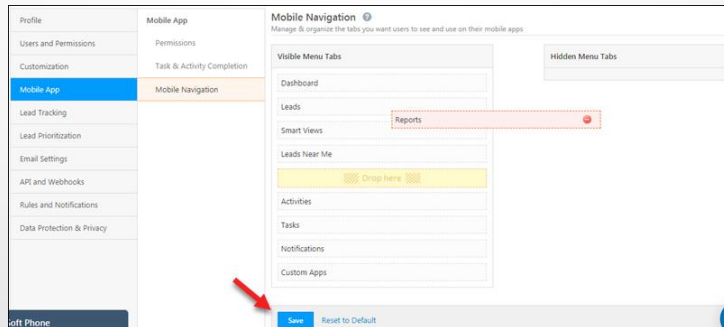


Mobile Navigation

Customizable Menus for all Users

Customize Mobile App Navigation

1. Navigate to Settings → Mobile App → Mobile Navigation
2. Drag menu options to and from the visible and hidden menu tabs to customize the menu.
3. Click **Save**.



List of default menus in LeadSquared Mobile App:

1. Dashboard
2. Leads
3. Smart Views
4. Leads Near Me
5. Activities
6. Tasks
7. Notifications
8. Reports
9. Day Plan

LeadSquared Mobile App Menus

List of default menus in LeadSquared Mobile App:

1. Dashboard
2. Leads
3. Smart Views
4. Leads Near Me
5. Activities
6. Tasks
7. Notifications
8. Reports
9. Day Plan

Leads Near Me

- The Leads Near Me feature of your LeadSquared mobile app detects leads in and around your geographical location.
- This allows you to view leads around you when you are on the move and would like to plan your day to close as many sales opportunities as possible.

Prerequisite

- You should install the latest version of LeadSquared mobile app
- You should install the Lead Location Updater App of LeadSquared. This app updates the address fields of a lead into location coordinates, thereby enabling the Leads Near Me feature to work.

Note: If you have used the Update Lead Location feature, the leads are available as the coordinates are automatically mapped to the address with it

Day Plan Feature

- The Day Plan feature automatically lists out all the Appointment type tasks from the start time to the end time for a particular day.
- It is enabled primarily on mobile platform
- It allows the users to see what all tasks they must complete during their work hours along with the Live Tracking Location

Prerequisites required to set up

- Step 1: From Settings navigate to Mobile App -> Mobile Navigation. Day Plan should be listed under 'Visible Menu Tabs'

Mobile Navigation

Manage & organize the tabs you want users to see and use on their mobile apps

Visible Menu Tabs

Leads

Smart Views

Leads Near Me

Tasks

Notifications

Activities

Day Plan

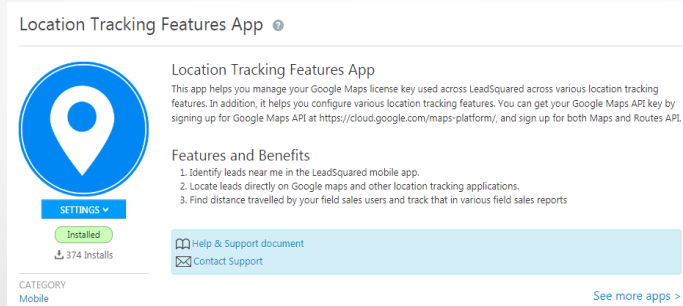
Configure Permissions

- Step 2: from under settings, navigate to Mobile App -> Permissions. Click on 'Edit' and enable 'Track real time location' under 'Location Tracking' for the user roles as per required and click on 'Save'.

Offline Smart View				
Allow access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
No. of records per tab	100	100	100	50
Overwrite Data	Ignore	Ignore	Ignore	Overwrite
Override settings on device	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Calls and SMS				
Track calls	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Record calls	No calls	No calls	No calls	Random calls
Track SMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Override settings on device	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location Tracking				
Track real-time location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Track location on lead update	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>				

Install Location Tracking Features APP

- Step 3: install and configure 'Location Tracking Features App' from the Apps Marketplace



While configuring the 'Location Tracking Features App', you need to enter your Google Maps API key and enable location tracking enabled features and save the settings.

Why Day Plan?

Features and Benefits

- Identify leads near you in the Leadsquared mobile app.
- Locate leads directly on Google maps and other location tracking applications

You must have the Google Geocoding API key/Google Maps API Key to set up this App

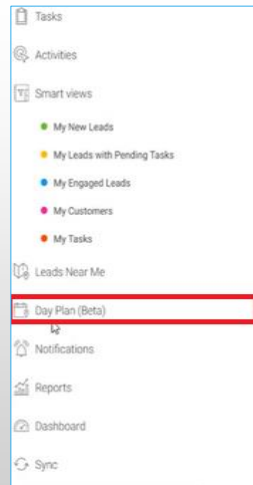
How to get Google Maps API key

- To get a Google Maps API key, navigate to :
<https://developers.google.com/maps/documentation/geocoding/intro>
- Visit the [Google Cloud Platform Console](#).
- Click the project drop-down and select or create the project for which you want to add an API key.
- Click the menu button and select **APIs & Services > Credentials**.
- On the **Credentials** page, click **Create credentials > API key**.
The **API key created** dialog displays your newly created API key.
- Click **Close**.

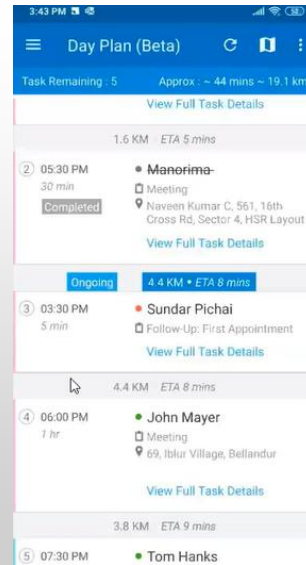
How to navigate on the mobile platform

Login to your LeadSquared account on the mobile.

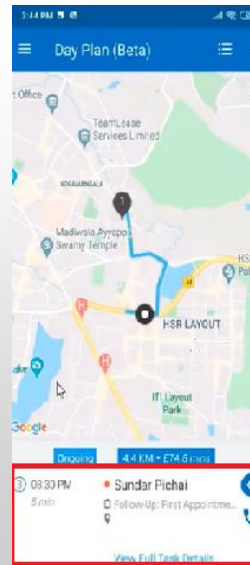
Click on the menu option on the top left from the options click on Day Plan (Beta) as shown in the adjacent figure.



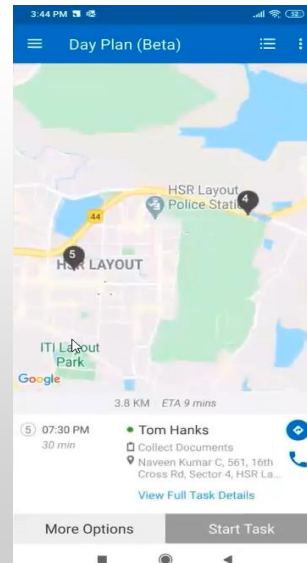
- All the Appointment type Tasks meant to be completed for the day will be shown up .
- The completed tasks will be marked 'Completed'
- The task currently working on will be marked 'Ongoing'



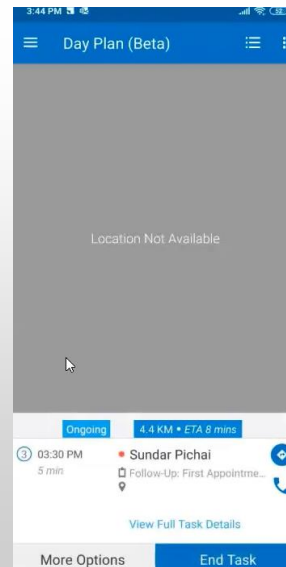
- If we click on the ongoing task, then it will show up on Google Maps with the location of each task w.r.t your current location and the shortest route for you to get there
- Route is shown on the map itself (as shown in the image)
- Click on 'View Full Task Detail' for more information about the Task



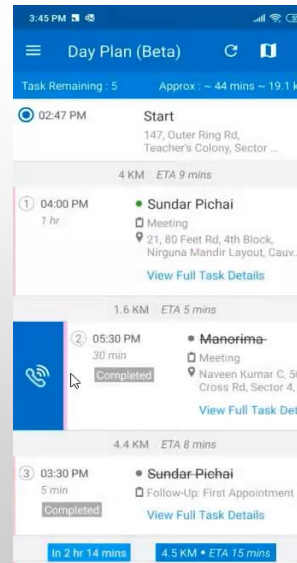
- You can swipe the tasks to find the succeeding ones with their location w.r.t the previous task as shown in image.
- Click on 'Start Task' to start the task you are on currently.



- Once you have completed the task, click on 'End Task'.
- At that time, the user completing the task will be shown certain task fields set up while creating that task and he must log in the details
- If the Task has no Location, then the grey screen will be visible (as shown in the image)



- For each task if there is a phone number associated with the lead, swipe to the right as shown in the image and the user can directly call the lead up from the Day Plan page.
- To view the Phone number, click on 'View Full Task Details'
- Right to left swipe for Edit and Cancel Task options



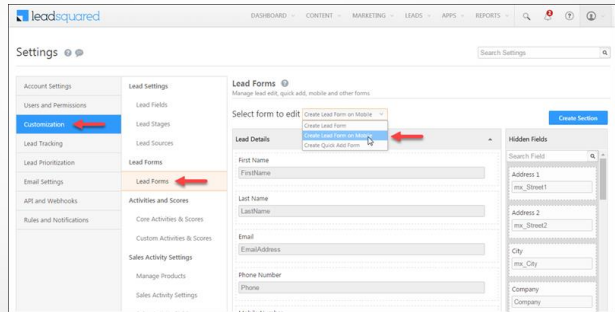


Customize Lead Card

Manage lead fields to be shown in Lead Card on Mobile

Customize Lead Card

- LeadSquared Mobile App can be customized to show only selected lead fields in specified order.
- Login to LeadSquared and navigate to My Account → Settings → Customization → Lead Forms. Select “Create Lead Form on Mobile” in “Select Form to Edit” as shown below



Prerequisite:

- You must be admin user of LeadSquared.

You can add field to the form, remove fields from it, change field order, create new sections

Save the changes. Once you save, the changes will be effective immediately on mobile app. The mobile app user just needs to logout and login again.

Custom Menus for Mobile Apps

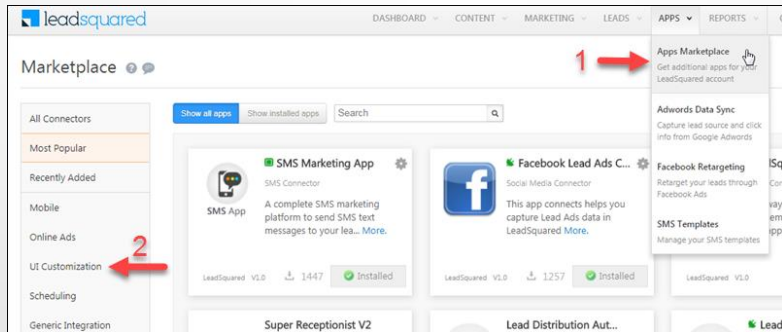
- The Custom Menus app for the LeadSquared mobile application lets you create a customized menu to display information from third-party websites on the app.
- These menus appear in the navigation tab of your app from where you can access external URLs or the third-party data straight from the app itself.

Prerequisites

- You must be an administrator of your LeadSquared account.
- You must run the latest version of the LeadSquared Android or iOS app.

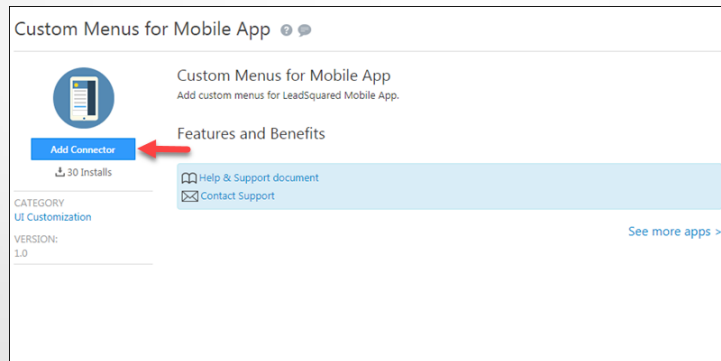
Custom Menus - Installation

1. Go to Apps → Apps Marketplace
2. Go to UI Customization → Custom Menus for Mobile App



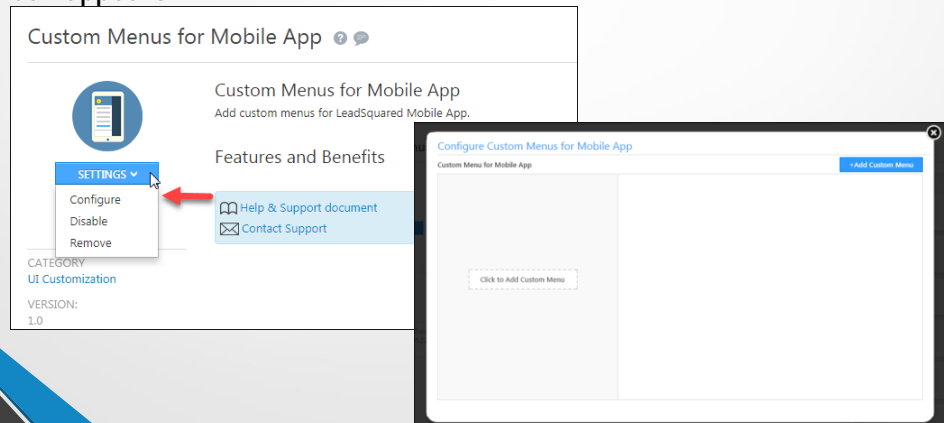
Custom Menus - Installation

Click **Add Connector**. Once the connector is installed, the **Settings** menu appears



Custom Menus - Configuration

Click **Configure**. The Configure Custom Menus for Mobile App pop-up box appears –



Custom Menus - Configuration

Select **Click to Add Custom Menu**. The area to create a custom menu appears on the right pane

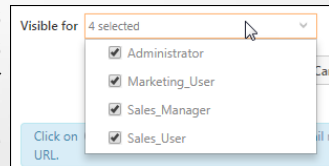
The screenshot shows a configuration window titled "Custom Menu for Mobile App". On the left, there is a dashed box labeled "Click to Add Custom Menu". On the right, there are input fields for "Title*", "URL*", and "Visible for". The "URL*" field contains "https://mydomain.com". Below these fields are "Save" and "Cancel" buttons. A blue tip box at the bottom states: "Click on ⓘ near the URL textbox to view list of mail merge fields which can be used in your URL."

Field	Value
Title*	
URL*	https://mydomain.com
Visible for	4 selected

Custom Menus - Configuration

Complete the following details:

- **Title** – Enter the title for the custom menu which appears in the LeadSquared mobile app.
- **URL** – This is the web URL you need to pass. This field accepts mail-merge fields as well.
- **Visible for** – This drop-down menu allows you to select which LeadSquared user types can view the custom menu in their respective mobile app. The drop-down can have the user types shown in the image below:



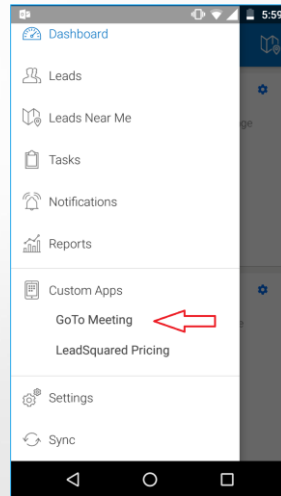
Once the settings are completed, click **Save**. The custom menu is created.

Custom Menus - Configuration

Once the settings are completed, click **Save**. The custom menu is created.

Once logged to the LeadSquared mobile app, a new tab called **Custom Apps** appears under which the custom menu you created will appear

As an example, a custom menu tab for the 'GoTo meeting' is created.





THANK YOU