

This document will provide you hands on experience on LeadSquared features with detailed step by step instructions in configuring and setting up the application.

LeadSquared Step by Step

Exercise Document

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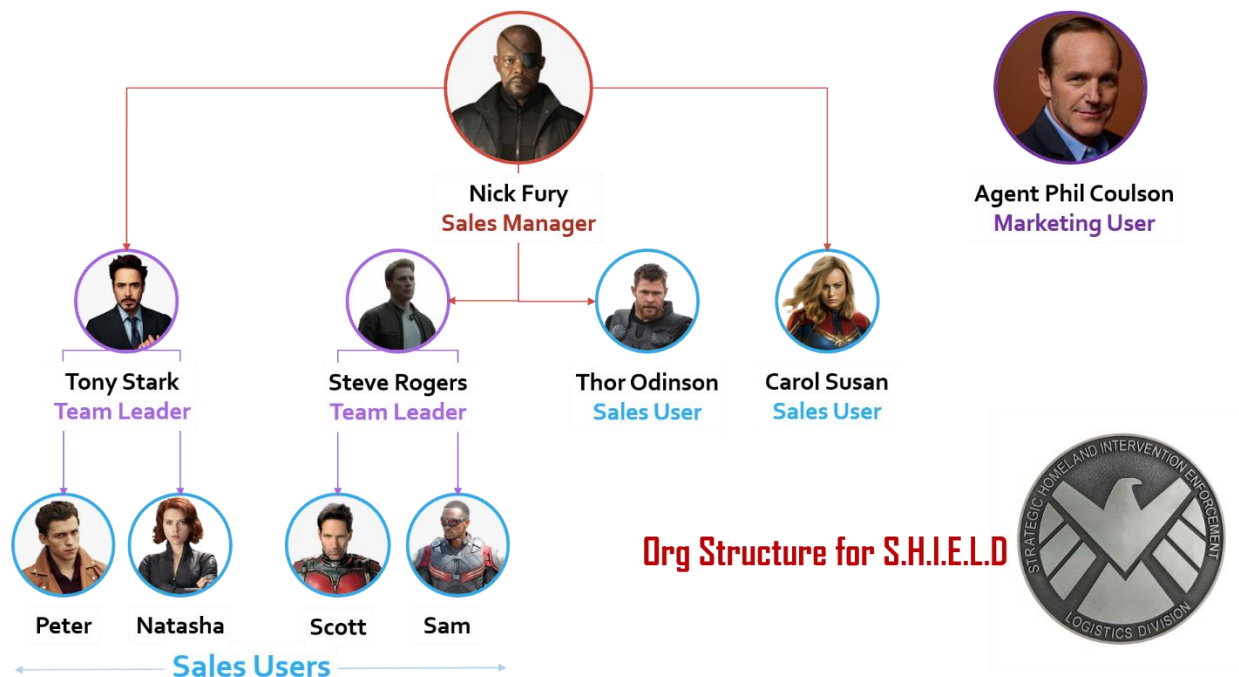
Business Scenario

As discussed in the module 1, S.H.I.E.L.D Insurance firm decided to launch its insurance services to all the Superheroes belonging to Marvel Universe. S.H.I.E.L.D. Insurance firm has following types of insurance products for its superheroes:

1. **Health Insurance.** Not that they need it, but it covers their family members too.
2. **Life Insurance.** Considering they put their life in danger for saving the world, it seems to be only sensible to have a life insurance
3. **Third Party Insurance,**
4. where in it will cover all the damages caused by them to the city during the rescue operations like what happened in New York when aliens attacked with the help of Loki.

S.H.I.E.L.D has their own set of teams who handles various tasks of selling and onboarding the superheroes to these offerings.

Org Structure of S.H.I.E.L.D.



S.H.I.E.L.D Insurance Firm – Business Process



Agent Coulson, promotes the services of S.H.I.E.L.D. via email campaigns, facebook ad campaigns and is responsible for maintaining website of S.H.I.E.L.D. Through his campaigns and landing pages, Leads are captured into LeadSquared.



Tony and Steve as team leaders looks after their team of sales users. They need complete view of the leads handled by their respective teams only. They also verify the Sales done by their teams.



Thor and Carol Susan works only on the high priority customers who has Lead Quality Criteria more than 6 which is calculated based on the Superhero Powers each of the leads has. Thus, they are assigned leads accordingly



Non-Priority Leads captured in LeadSquared will be auto assigned to the users based on the availability. Sales Users will be calling these leads and trying to convert them into customers. They capture Calls in Call Disposition, Collect Documents and finally Sales information is captured.

Chapter 1: Creating Users and Company Profile

Setting up Users and defining company profile is one of the configurations system admins needs to do. As we setup the LeadSquared account, setting up company profile and users are the first things to do.

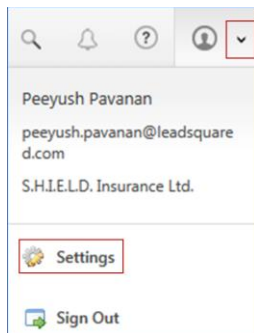
User roles are pre-defined in each LeadSquared account. Thus, as we create new users, we will also assign roles as per the business case. Roles assigned to the users define the level of access user will have when they login to LeadSquared. Following are the four roles:

1. Administrator
2. Sales Manager
3. Sales User
4. Marketing User

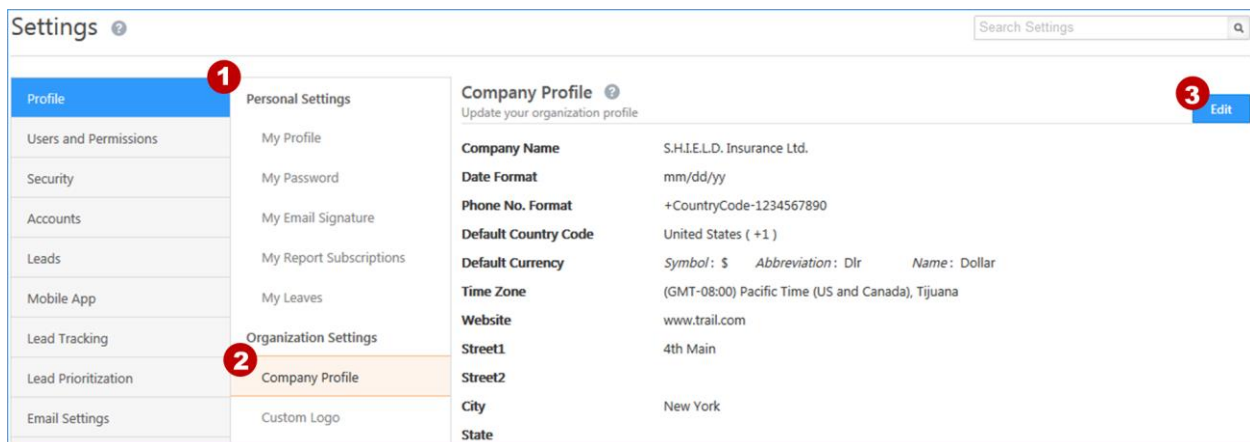
Company Profile is a very simple settings page that allows you to update basic company data. You must provide Company Name and address data before you can use Email Campaign feature. The Company Name and Address is used in the footer of Emails to meet Can-Spam guidelines.

Step by Step: Managing Company Profile

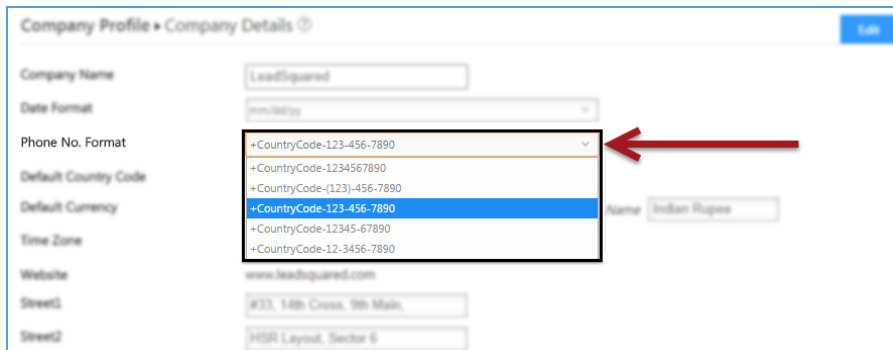
Step 1: Open Settings page from profile



Step 2: Navigate to Company Profile and click on Edit. Change the Company Name to **S.H.I.E.L.D. Insurance Ltd.**



Step 3: Select the phone no. format and default country code as per your choice.



Company Profile - Company Details

Company Name: LeadSquared

Date Format: mm/dd/yyyy

Phone No. Format: +CountryCode-123-456-7890

Default Country Code: +CountryCode-123-456-7890

Default Currency: Indian Rupee

Time Zone: GMT+05:30 Chennai, Kolkata, Mumbai, New Delhi

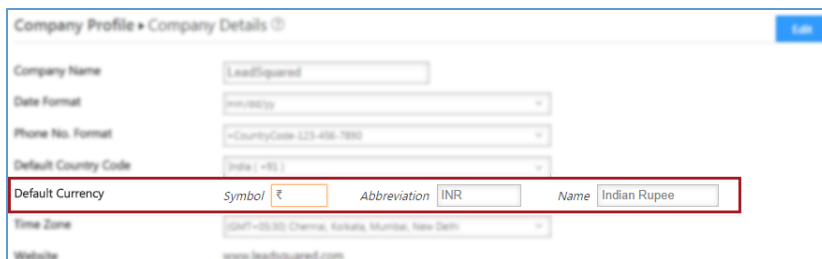
Website: www.leadSquared.com

Street1: #33, 14th Cross, 9th Main

Street2: HSR Layout, Sector 6

All the phone numbers of leads in LeadSquared will be displayed in form of selected phone no. format and the default country code will remain selected in add new lead forms when phone controller is used in phone no. fields

Step 4: Specify your default currency which will be used while adding a sales activity for a lead. By default, its value is US Dollar '\$'



Company Profile - Company Details

Company Name: LeadSquared

Date Format: mm/dd/yyyy

Phone No. Format: +CountryCode-123-456-7890

Default Country Code: India (+91)

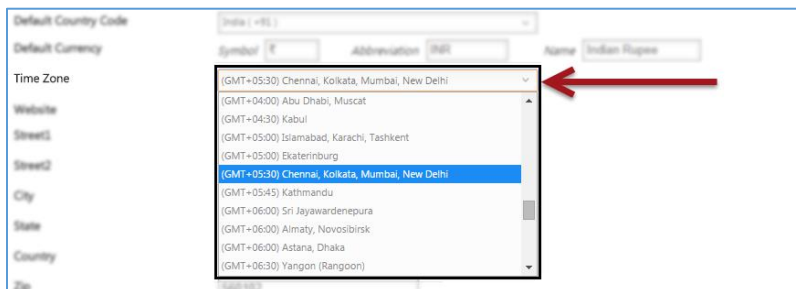
Default Currency: Symbol ₹, Abbreviation INR, Name Indian Rupee

Time Zone: GMT+05:30 Chennai, Kolkata, Mumbai, New Delhi

Website: www.leadSquared.com

Step 5: Specify the date format and the time zone for the Company.

The selected date will be default format for all users. The selected time zone will be used in your Company level reports that may go to one or more users of LeadSquared. The time zone for a user may be different from Company. The user will see date & time as per his/her time zone. Only the reports (available at SettingsMy ProfileReport Subscriptions) that capture company level data will use the Company time zone.



Company Profile - Company Details

Default Country Code: India (+91)

Default Currency: Symbol ₹, Abbreviation INR, Name Indian Rupee

Time Zone: (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi

Website: www.leadSquared.com

Street1: #33, 14th Cross, 9th Main

Street2: HSR Layout, Sector 6

City: HSR Layout, Sector 6

State: Karnataka

Country: India

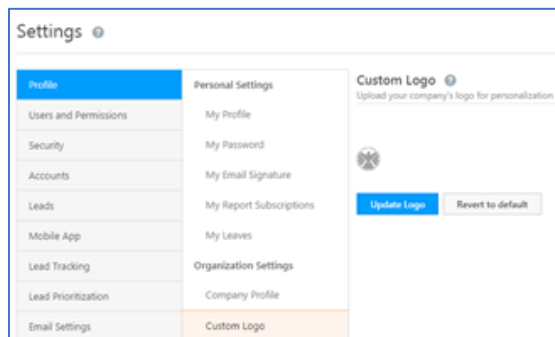
Zip: 560022

Step 6: Click on Save button to save the changes.

Note: You **cannot** edit the website URL of the company. This is provided at the time of your account creation and cannot be changed. If you are in need of changing the same, then contact <http://support.leadSquared.com>

Step 7: Adding Company Logo

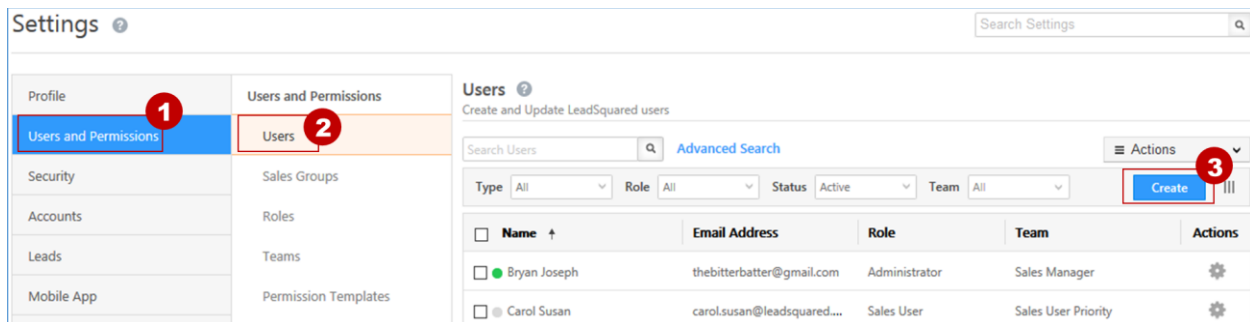
Click on “Custom Logo” under Organization Settings to add the company logo onto the LeadSquared platform. Click on Update Logo button to upload the image. Use any SHIELD image as the logo.



Step by Step: Creating Users

The Manage Users Page is where you'll find the list of all your LeadSquared users. From here you can create, update and perform a range of actions on your users. You can also export your users to a CSV file and perform bulk updates.

Step 1: Navigate to **Settings**→**Users and Permissions**→**Users**. To create a new user, click **Create**.



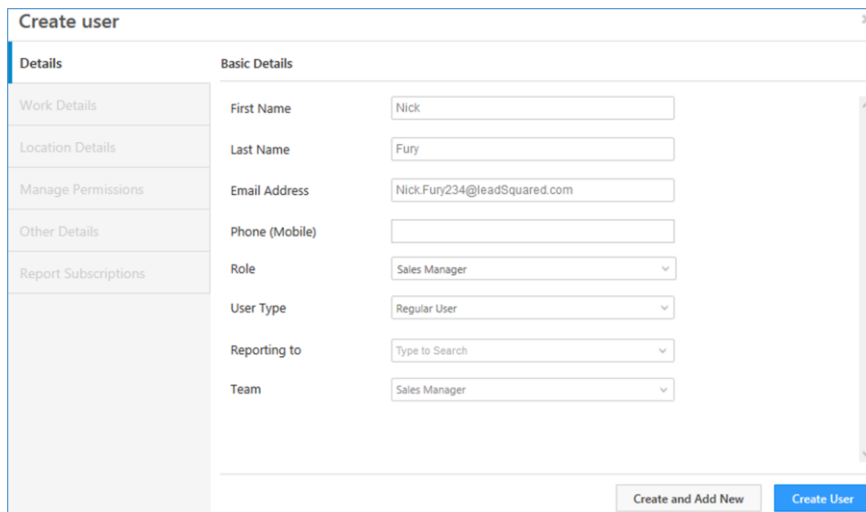
Step 2: On the Create User pop-up, fill in all the necessary details.

Note: You can create a user by entering only first name and email address fields and clicking Save. However, we recommend you enter all the relevant information that you can leverage while using other LeadSquared features like automation.

Basic Details

Provide all the basic details of the user (including the user role) here. You can also choose a reporting manager and team.

For Nick Fury: Enter First name as Nick, Last Name as Fury and Email address *any fictitious email address*. Assign the role of Sales Manager and User Type as Regular User

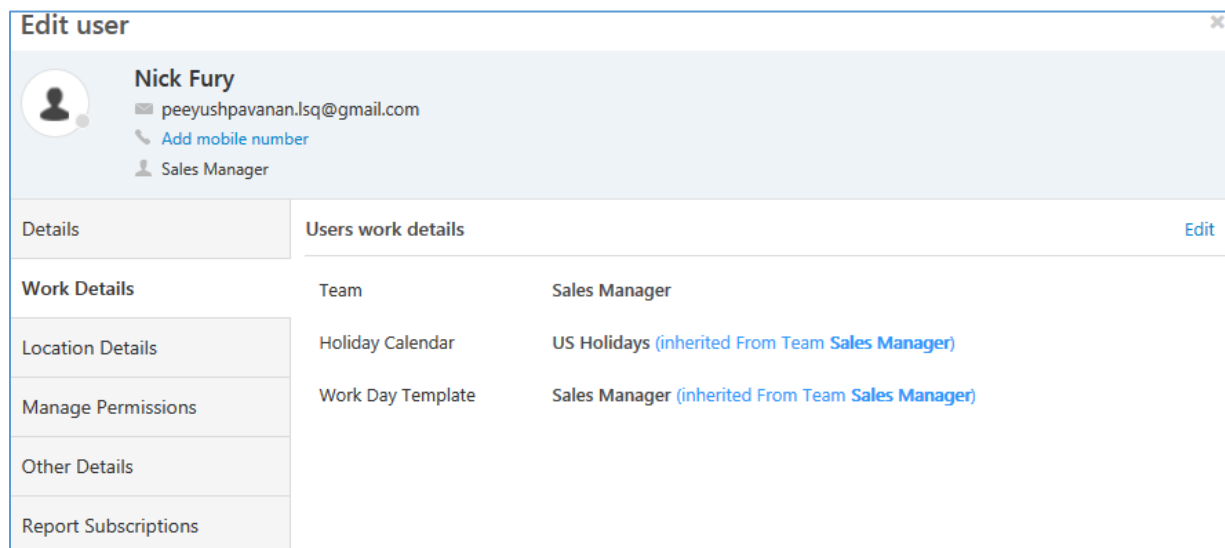



Create user	
Details	Basic Details
Work Details	First Name: Nick
Location Details	Last Name: Fury
Manage Permissions	Email Address: Nick.Fury234@leadSquared.com
Other Details	Phone (Mobile):
Report Subscriptions	Role: Sales Manager
	User Type: Regular User
	Reporting to: Type to Search
	Team: Sales Manager
Create and Add New Create User	

Note: The **Phone (Mobile)** field will be used 2-factor authentication as well as password reset actions. It can only be updated by Administrators.

Work Details

Here, you can add the user to a **team**, apply a **holiday calendar** and a **workday template**.




Edit user		
<div>Nick Fury peeyushpavanan.lsqa@gmail.com Add mobile number Sales Manager</div>		
Details	Users work details Edit	
Work Details	Team	Sales Manager
Location Details	Holiday Calendar	US Holidays (inherited From Team Sales Manager)
Manage Permissions	Work Day Template	Sales Manager (inherited From Team Sales Manager)
Other Details		
Report Subscriptions		

For now, you can leave the work details as blank. We will update the same once we create teams, holiday calendar and workday templates in next chapter


Location Details

Use this tab to enter the user's address.

 <div>Nick Fury peeyushpavanan.isq@gmail.com Add mobile number Sales Manager</div>	
Details	Users location details Edit
Work Details	Location Name
Location Details	Address
Manage Permissions	City
Other Details	State
Report Subscriptions	Country
	Zip Code

Other Details

This tab lets you save custom data about your users like their birthdays, joining dates, marital status, etc.

 <div>Nick Fury peeyushpavanan.isq@gmail.com Add mobile number Sales Manager</div>	
Details	Custom user fields Edit
Work Details	Telephony Agent Id
Location Details	Salutation
Manage Permissions	Superhero Name
Other Details	Date of Joining
Report Subscriptions	Birth Date
	Marital Status
	Custom 6
	Custom 7

You can later use this information to set up automations to automatically send them greetings and notifications.

Next Steps

How we created Nick Fury, similarly, create other users of S.H.I.E.L.D. Insurance Ltd.

First Name	Last Name	Role	User Type
Agent	Phil Coulson	Marketing User	Regular User
Tony	Stark	Sales User	Regular User
Steve	Rogers	Sales User	Regular User
Peter	Parker	Sales User	Regular User
Natasha	Romanoff	Sales User	Regular User
Scott	Lang	Sales User	Regular User
Sam	Wilson	Sales User	Regular User
Thor	Odinson	Sales User	Regular User
Carol	Susan	Sales User	Regular User

Chapter 2: Creating Sales Groups

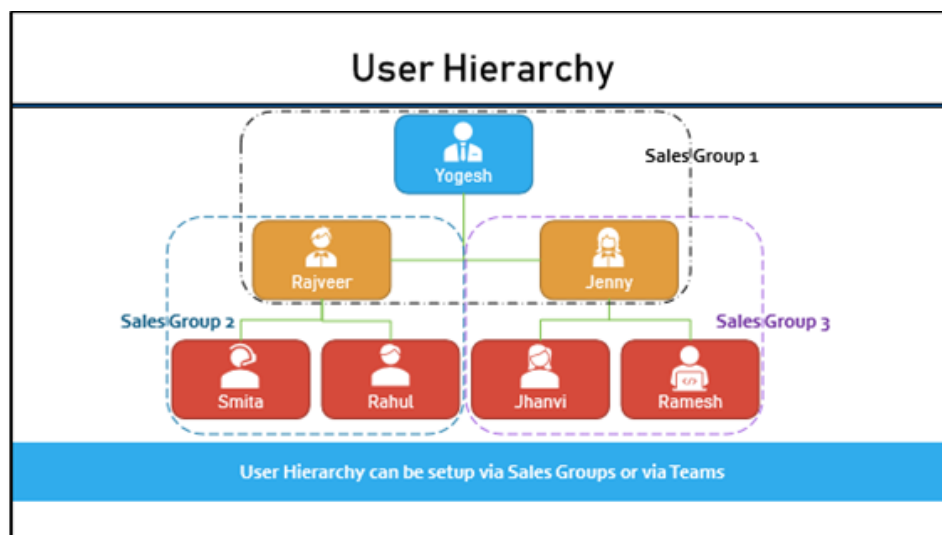
You can organize your sales users into different groups based on location, business unit or any other categorization of your choice. This makes it easier for you to manage your users and leads in keeping with your business use case.

Only sales user can be part of the sales group. As you create Sales group, you can assign one or more Sales User as the group manager. The Sales Group Manager will have access to all the leads assigned to the Sales Users who are part of the group. The level of access will depend upon what has been defined to the Sales User while adding them as group manager.

NOTE:

- 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.

Here's an example to show how it works



Rajveer as the group manager will have access to the leads assigned to Smita and Rahul, while, Jenny as group manager 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) if we assign Yogesh as sales group manager, while, Rajveer and Jenny as Sales Users.

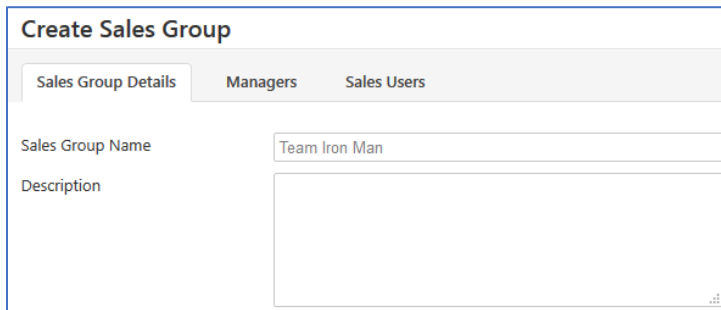
Alternatively, we can assign the role of sales manager to Yogesh and avoid creating a sales group for Rajveer, Jenny and Yogesh.

Step by Step: Creating Sales Group

Step 1: Navigate to **Users and Permissions**

Step 2: Click on Sales Group. Click on Create button to get started.

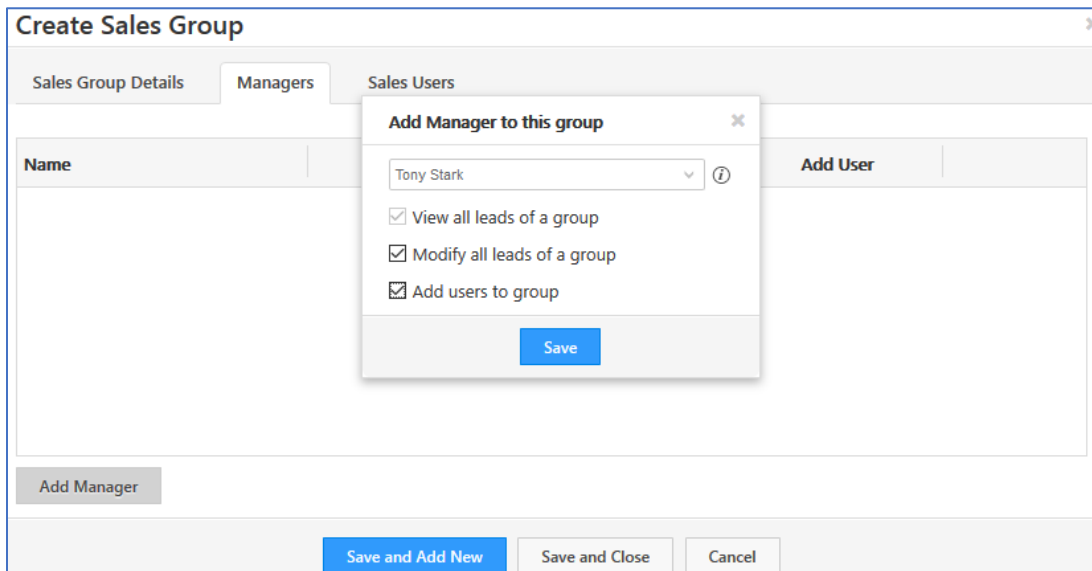
Step 3: Provide the name of the Sales Group in the first tab. As per our business scenario, name it as **Team Iron Man**.



The screenshot shows the 'Create Sales Group' form with the 'Sales Group Details' tab selected. The 'Sales Group Name' field contains 'Team Iron Man'. The 'Description' field is empty. The 'Managers' and 'Sales Users' tabs are also visible.

Step 4: Click on Managers tab. On this tab, we will add the sales users who should be Sales Group Manager. We can also specify the amount of access they should be given for the leads assigned to the group members.

In our case, add Tony Stark as the group manager and give Modify all leads of a group access and Add users to group access.



The screenshot shows the 'Create Sales Group' form with the 'Managers' tab selected. An 'Add Manager to this group' dialog box is open, showing 'Tony Stark' as the selected user. The dialog box has three checked options: 'View all leads of a group', 'Modify all leads of a group', and 'Add users to group'. The 'Save' button is visible. The background form shows the 'Add Manager' button and the 'Add User' button.

Step 4: Click on Sales Users tab. Here is where we add the different Sales Users into the Sales Group.

Note: Sales Group Manager of different group can be added as sales group user. They will have a (manager) next to it

In our case, we will be adding Peter Parker and Natasha Romanoff to Tony's Team (Team Iron Man). See the screenshot given, below:

The screenshot shows a 'Create Sales Group' dialog box with a close button (X) in the top right corner. It has three tabs: 'Sales Group Details', 'Managers', and 'Sales Users', with the 'Sales Users' tab currently selected. The dialog is divided into two main sections: 'Available Users' on the left and 'Assigned Users' on the right. Each section has a search bar with the placeholder text 'Type here to search' and a magnifying glass icon. Below the search bars are lists of users. In the 'Available Users' list, the names are Carol Susan, Sam Wilson, Scott Lang, Steve Rogers (Manager), and Thor Odinson. In the 'Assigned Users' list, the names are Natasha Romanoff and Peter Parker. Between the two lists are two circular buttons with right and left arrows. At the bottom of the dialog are three buttons: 'Save and Add New' (highlighted in blue), 'Save and Close', and 'Cancel'.

Available Users	Assigned Users
Carol Susan	Natasha Romanoff
Sam Wilson	Peter Parker
Scott Lang	
Steve Rogers (Manager)	
Thor Odinson	

Next Steps

On the lines of how we created the Sales Group for Team Iron Man, you will now create a Sales Group for Team Captain America with Steve Rogers as the Sales Group Manager. Scott Lang and Sam Wilson as the Sales Users of the group.

Chapter 3: Creating Permission Templates

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 users to view/edit only certain lead fields/activities/tasks.

	View	Create	Edit	Delete	Export	Import	Mark Complete
Accounts	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Allowed	Not Allowed	Not Allowed
Leads	Allowed	Allowed	Allowed	Allowed	Allowed	Allowed	Not Applicable
Activities	Allowed	Allowed	Allowed	Allowed	Allowed	Not Allowed	Not Allowed
Tasks	Allowed	Allowed	Allowed	Allowed	Not Allowed	Not Allowed	Allowed

Allowed	Provides complete access to the permission type. (green color)
Not Allowed	Provides no access to the selected permission type. (white color)
Partially Allowed	Allows to selectively choose the fields user should have access to (yellow color)

As part of S.H.I.E.L.D. Insurance Ltd., you are required to create two set of permission templates. One for Sales User Non-Priority and another for Sales User Priority. As per S.H.I.E.L.D Insurance Ltd. Sales Users are only supposed to convert the leads into customers, they should not be able to do somethings like deleting leads. Also, confidential information about leads should not be exposed to them

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.

Following will be the two-permission template's configuration you need to create:

1. **Non Priority Permission template:**

- Should not have Delete Lead access.
- Lead fields Email, Phone Number and Mobile number should not be visible to them under View access, should not be editable under Edit access.

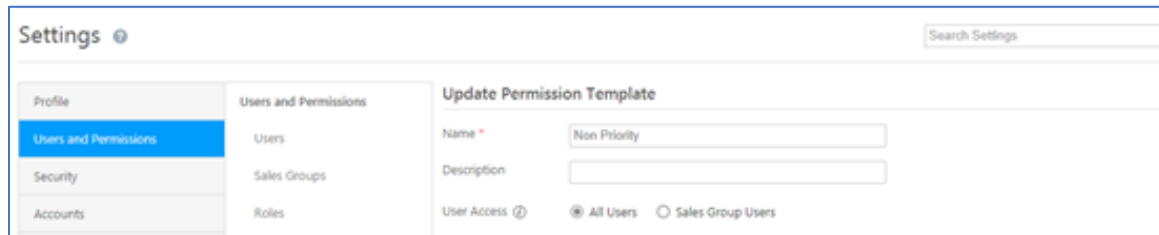
2. **Priority Permission template:** All access should be given except for Delete Lead access which should be Not Allowed in the permission template.

Step by Step: Creating Permission Template

Step 1: Navigate to Settings

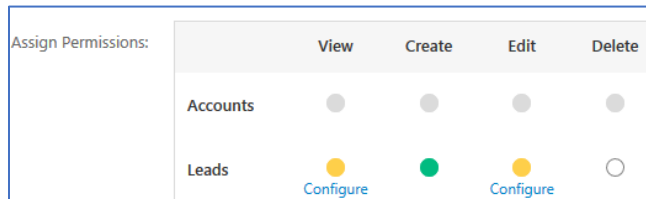
Step 2: Under Users and Permissions, click on Permission Template.

Step 3: Click on Create to Create and name the template as Non Priority.



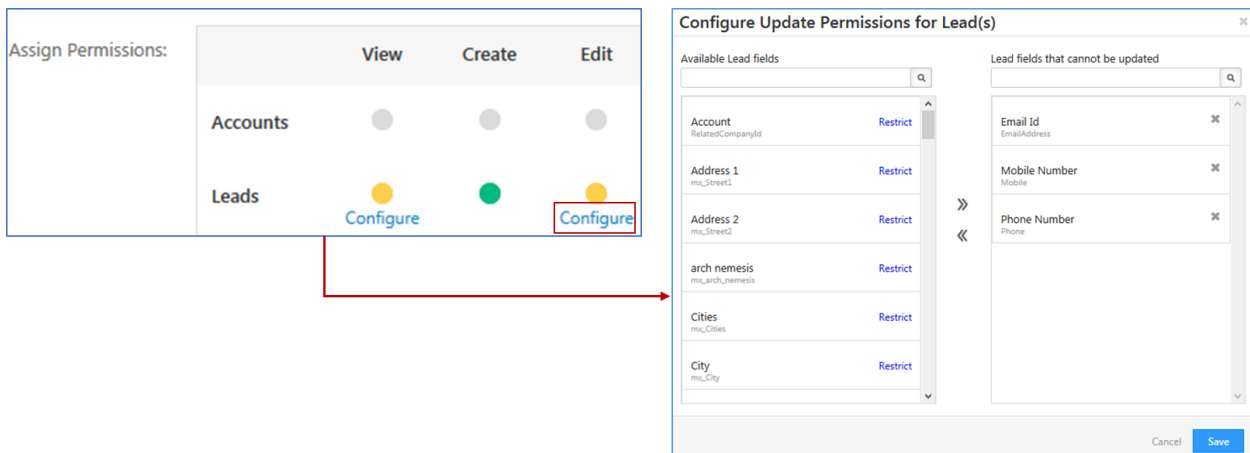
The screenshot shows the 'Settings' page with a sidebar on the left containing 'Profile', 'Users and Permissions', 'Security', and 'Accounts'. The 'Users and Permissions' section is active, showing 'Users', 'Sales Groups', and 'Roles'. The main area is titled 'Update Permission Template' and contains a 'Name' field with the value 'Non Priority', a 'Description' field, and a 'User Access' section with radio buttons for 'All Users' (selected) and 'Sales Group Users'.

Step 4: According to the requirements mentioned above revoke the Delete access for Leads by making it Not Allowed. Click on the node to assign Not Allowed access.



Assign Permissions:	View	Create	Edit	Delete
Accounts				
Leads				

Step 5: For Edit node of Leads, make it Partially Allowed by clicking on the node. Click on Configure link appearing below the node. Click on Restrict link next to the fields you need to restrict. In our case, it will be Email, Phone Number and Mobile Number.



The screenshot shows the 'Configure Update Permissions for Lead(s)' dialog. It has two main sections: 'Available Lead fields' and 'Lead fields that cannot be updated'. The 'Available Lead fields' section lists various fields with a 'Restrict' link next to each. The 'Lead fields that cannot be updated' section lists 'Email Id', 'Mobile Number', and 'Phone Number', each with a 'Restrict' link. A red arrow points from the 'Configure' link in the 'Assign Permissions' table to the 'Configure' link in the 'Available Lead fields' list.

Step 6: Make Partially Allowed for Leads – View by restricting Email, Phone number and Mobile number field.

The image shows two screenshots. The first is the 'Assign Permissions' dialog, which has columns for View, Create, and Edit. The 'Leads' row shows a yellow circle under 'View' and a green circle under 'Edit'. A red box highlights the 'Configure' link under the 'View' column for 'Leads'. The second screenshot is the 'Configure View Permissions for Lead(s)' dialog. It has two panes: 'Available Lead fields' and 'Masked Lead Fields'. In the 'Available Lead fields' pane, 'Email Id', 'Phone Number', and 'Mobile Number' are listed with a 'Restrict' button next to each. In the 'Masked Lead Fields' pane, 'Email Id', 'Phone Number', and 'Mobile Number' are listed with a mask icon (a circle with an X) next to each. A red arrow points from the 'Configure' link in the first screenshot to the 'Configure View Permissions for Lead(s)' dialog.

Step 7: Click on **Save**. Your new permission template would like the screenshot given, below:

The image shows the 'Assign Permissions' dialog with the following permissions assigned:

	View	Create	Edit	Delete	Export	Import	Mark Complete
Accounts	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed
Leads	Partially Allowed	Allowed	Partially Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed
Activities	Allowed	Allowed	Allowed	Allowed	Allowed	Not Allowed	Not Allowed
Tasks	Allowed	Allowed	Allowed	Allowed	Not Allowed	Not Allowed	Allowed

Legend:
 ○ Not Allowed
 ● Partially Allowed
 ● Allowed
 ● Not Applicable

Step by Step: Assigning Permission Template

A permission template can be assigned to the user directly or indirectly via Roles and/or Sales Groups. In following steps, you will observe the steps taken to assign the permission template to the users.

Step 1: Navigate to Permission Templates list from Settings → User and Permissions → Permission Templates

Step 2: Hover over the gear icon next to the permission template you just created and select Apply Template from the dropdown options.

Name	Description	Assigned To	Modified By	ModifiedOn ↓	Actions
Non Priority		4 Users	Peeyush Pavanan	03/01/20 08:43 PM	<div> Edit Delete Apply Template </div>
Priority		2 Users	Bryan Joseph	02/11/ PM	
1 - 2 of 2					

Step 3: To assign permission template directly to the users, go to User Level tab and select users. To assign permission template to Roles, go to Roles Level tab and similarly go to Groups Level tab to assign permission template to Sales Groups.

In our case, the permission template that we created for Peter, Natasha, Scott and Sam, cannot be assigned to the Sales Groups since, it 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.

Hence, select User Level tab and add Natasha Romanoff, Peter Parker, Sam Wilson and Scott Lang from the User List to User with this Template (see below).

Apply Template - Non Priority

User Level Role Level Group Level

Search By: None

User List

Type here to search

- Carol Susan
- Nick Fury
- Phil Coulson
- Steve Rogers
- Thor Odinson
- Tony Stark

Users with this Template

Type here to search

- Natasha Romanoff
- Peter Parker
- Sam Wilson
- Scott Lang

Cancel Save

Step 4: Click on Save. With that, you have successfully assigned the Non Priority Permission template to Natasha, Peter, Sam and Scott.

Next Steps

Create second permission template for Priority Users and apply the template shown below to Thor and Carol. Following will be the configuration:

1. **Priority Permission template:** All access should be given except for Delete Lead access which should be Not Allowed in the permission template.

Ensure, permission template is assigned to the users directly and not to the role and/or groups.

	View	Create	Edit	Delete	Export	Import	Mark Complete
Accounts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leads	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Activities	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tasks	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

☐ Not Allowed ☒ Partially Allowed ☒ Allowed ☐ Not Applicable

Chapter 4: Concept of Teams and different features of Teams

The LeadSquared Teams feature lets you group users into teams that reflect your organization's structure and hierarchy. The different features of teams include workday templates, holiday calendars and smart views.

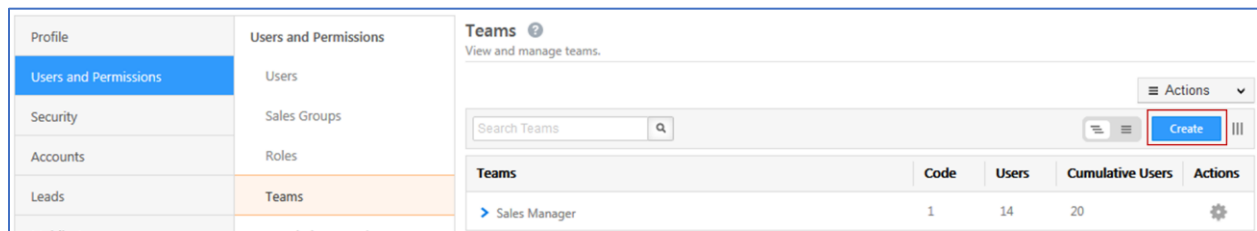
Before we explore each feature, let's see how we create a Team and how you add a user to a Team.

Step by Step: Creating Teams

Let's create a team for the Sales Manager Nick Fury and call it Sales Manager and we'll apply all the features of teams here.

Step 1: Navigate to Users and Permissions click on Teams.

Step 2: Click on create and name the team 'Sales Manager'



Here is where you mention which is the parent team and the child teams inherits features from the parent team. In our case, this is the first team we are creating so there is no child team.

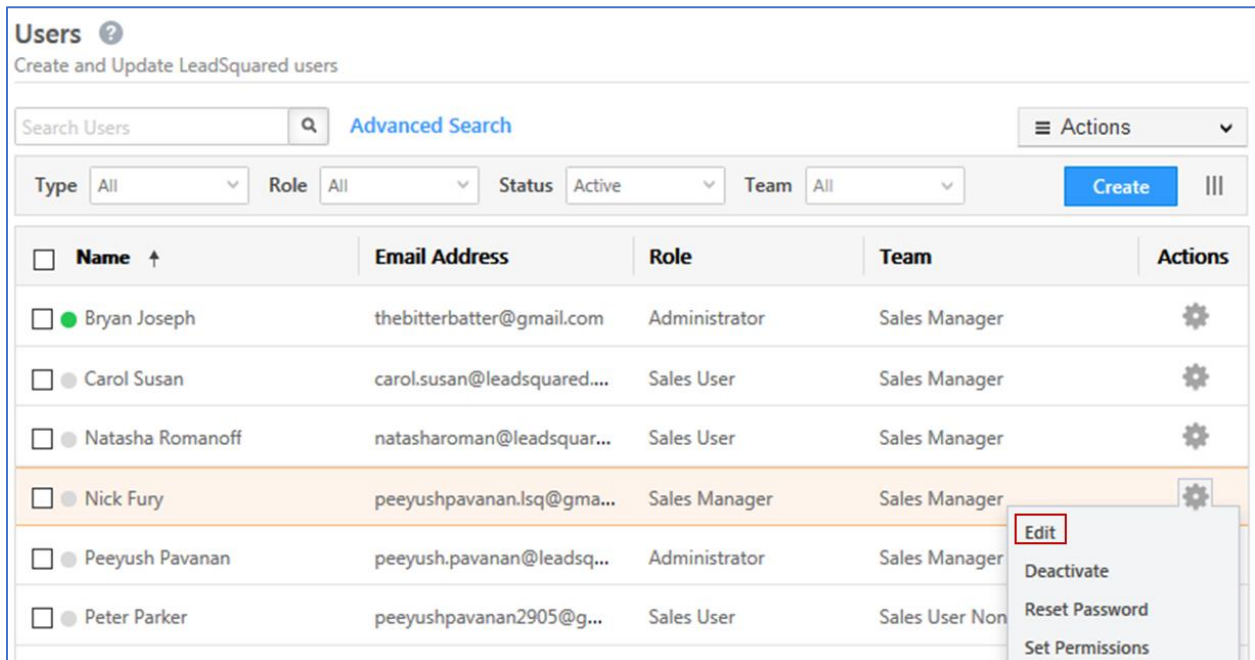
Note: Teams once created, can be deleted only if the following conditions are true:

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 topmost team cannot be deleted once created.

Step by Step: Adding a User to a Team

Let's add Nick Fury to the team 'Sales Manager'

Step 1: Navigate to Users and hover over the gear icon next to Nick Fury. Click on Edit option.



Users ?
Create and Update LeadSquared users

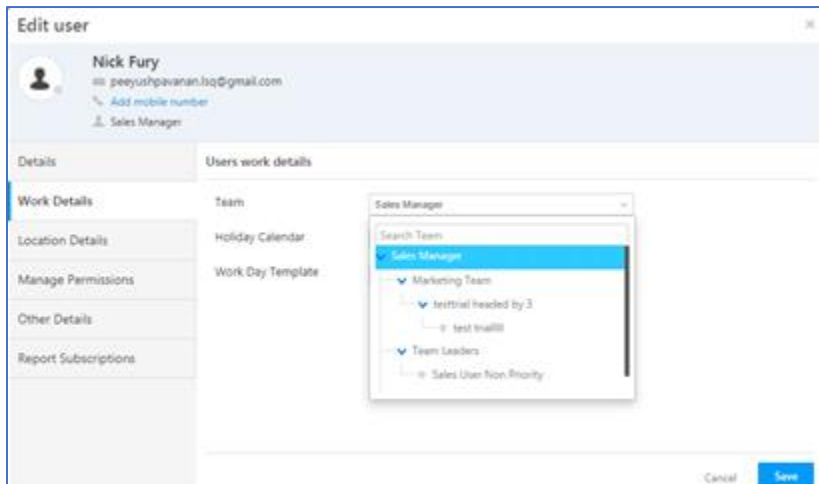
Search Users [Advanced Search](#) ≡ Actions

Type All Role All Status Active Team All Create ⋮

<input type="checkbox"/>	Name ↑	Email Address	Role	Team	Actions
<input type="checkbox"/>	Bryan Joseph	thebitterbatter@gmail.com	Administrator	Sales Manager	
<input type="checkbox"/>	Carol Susan	carol.susan@leadsquared....	Sales User	Sales Manager	
<input type="checkbox"/>	Natasha Romanoff	natasharoman@leadsquar...	Sales User	Sales Manager	
<input type="checkbox"/>	Nick Fury	peeyushpavanan.lsq@gmail...	Sales Manager	Sales Manager	
<input type="checkbox"/>	Peeyush Pavanan	peeyush.pavanan@leadsq...	Administrator	Sales Manager	
<input type="checkbox"/>	Peter Parker	peeyushpavanan2905@g...	Sales User	Sales User Non	

Edit
Deactivate
Reset Password
Set Permissions

Step 2: Click on **Work Details** tab on your left then on Edit. Here we can assign the Team 'Sales Manager' to a Nick Fury.



Edit user

Nick Fury
peeyushpavanan.lsq@gmail.com
[Add mobile number](#)
Sales Manager

Details
Work Details
Location Details
Manage Permissions
Other Details
Report Subscriptions

Users work details
Team
Holiday Calendar
Work Day Template

Sales Manager
Search Teams
Sales Manager
Marketing Team
Testtrial headed by 3
Test trial
Team Leaders
Sales User Non-Priority

Cancel Save

Next Steps

Create the rest of the teams and assign Users to the Team as per the table given, below:

Team Name	Parent Team	Assigned Users
Marketing Team	Sales Manager	Agent Phil Coulson
Team Leaders	Sales Manager	Tony and Steve
Sales User Non Priority	Team leaders	Peter, Natasha, Scott and Sam
Sales User Priority	Sales Manager	Thor and Carol

Following will be the structure of the teams you will be creating:

Teams ?
View and manage teams.

Search Teams

≡ ≡ Create |||

≡ Actions

Teams	Code	Users	Cumulative Users	Actions
▼ Sales Manager	1	14	20	⚙
● Marketing Team	16	1	1	⚙
▼ Team Leaders	17	2	5	⚙
● Sales User Non Priority	18	3	3	⚙
● Sales User Priority	20	0	0	⚙

Workday Template

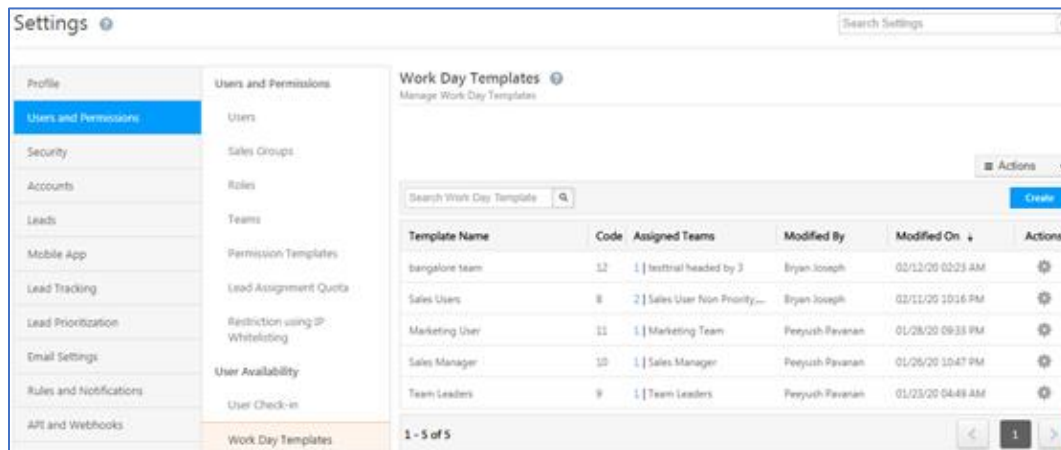
Workday templates let you define the schedule and working hours of your organization so you can automatically check-in your users* using Automations. It lets you set the time zone you work in, working days, office hours, and break timings

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 workday templates and apply them to your teams.

Step by Step: Creating and assigning Workday Templates

Let's say all the sales users must work during weekdays from 9-5 and they have a lunch break in between for 1 hour from 1-2. Let's call the workday template 'Sales User Daily Schedule'

Step 1: Navigate to Users and Permission and Work Day Templates. Click on create



Step 2: In the following pop-up screen, we will give a name 'Sales User Daily Schedule', select the time zone, select the working days, define the work timing and add the breaks.

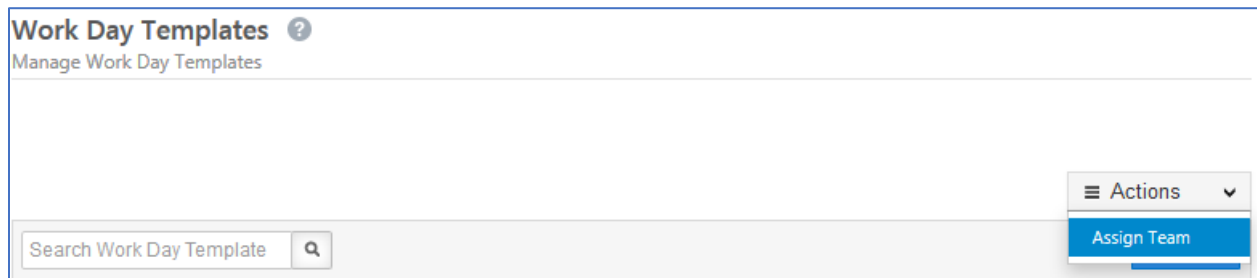
The screenshot shows the 'Create Work Day Template' form. It includes fields for Name, Time Zone, Working Days, Day Wise, Working Hours, and Breaks. The 'Name' field is filled with 'Sales User Daily Schedule'. The 'Time Zone' dropdown is set to '(GMT-08:00) Pacific Time (US and Canada), Tijuana'. The 'Working Days' section shows buttons for Mon, Tue, Wed, Thu, Fri, Sat, and Sun. The 'Day Wise' checkbox is unchecked. The 'Working Hours' section shows '09:00 AM' and '05:00 PM' with a dropdown arrow highlighted by a red box. The 'Breaks' section shows '01:00 PM' and '02:00 PM' with a trash icon.

Note: To add Breaks, click on the dropdown icon highlighted in the screenshot given, above.

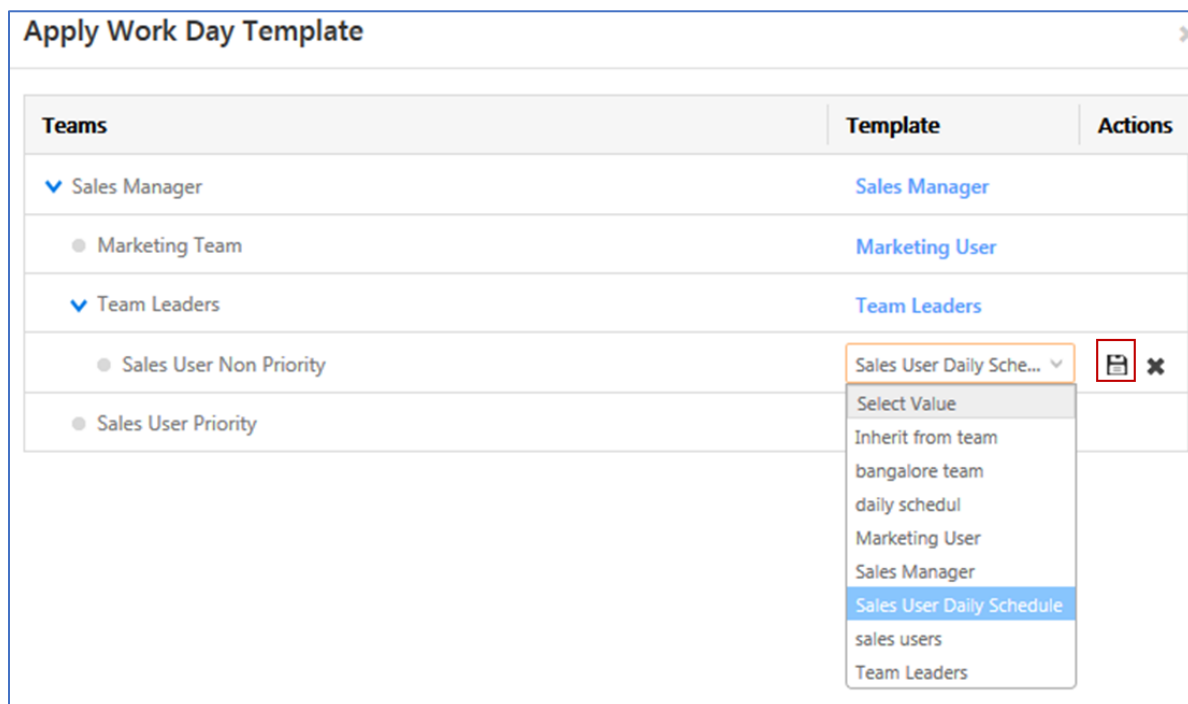
By ticking the day wise check box we can individually add the timings for each work day.

Step 3: click on Save

Step 4: To assign the workday template to teams, hover over the Actions button displayed on the Work Day template page Click on Assign Team option.



Step 5: From this screen, you can assign Work Day Template to different teams. Click on pencil icon next to Sales User Non Priority team and select “Sales User Daily Schedule” work day template from the dropdown.



Step 6: Click on Save icon, highlighted in the screenshot above.

Next Steps

Like Sales User Daily Schedule, create a workday template for ‘Marketing Team’. His schedule must include 10 hours work every day with 1-hour break from 12 to 1 and his off days are Monday and Tuesday.

Holiday Calendar

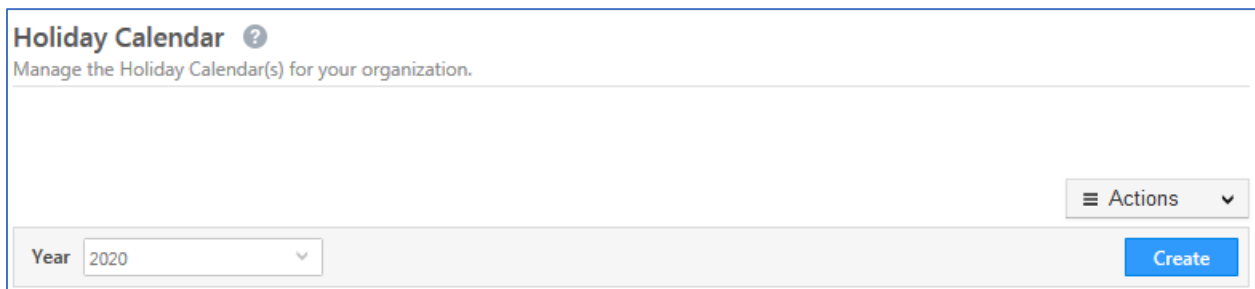
The Holiday Calendar feature lets you create your organizations holiday schedule in your LeadSquared account. You can apply the holiday calendars you create to different teams across different regions.

Let us create a holiday calendar called 'US Holidays' and setup 1st of January as New Year, 4th July as Independence Day, 27th Nov as Black Friday and 25th Dec as Christmas. We will assign this calendar to Sales Manager and every other team under Sales Manager (directly or indirectly) will inherit the same calendar from Sales Manager.

Step by Step: Creating and Assigning Holiday Calendars

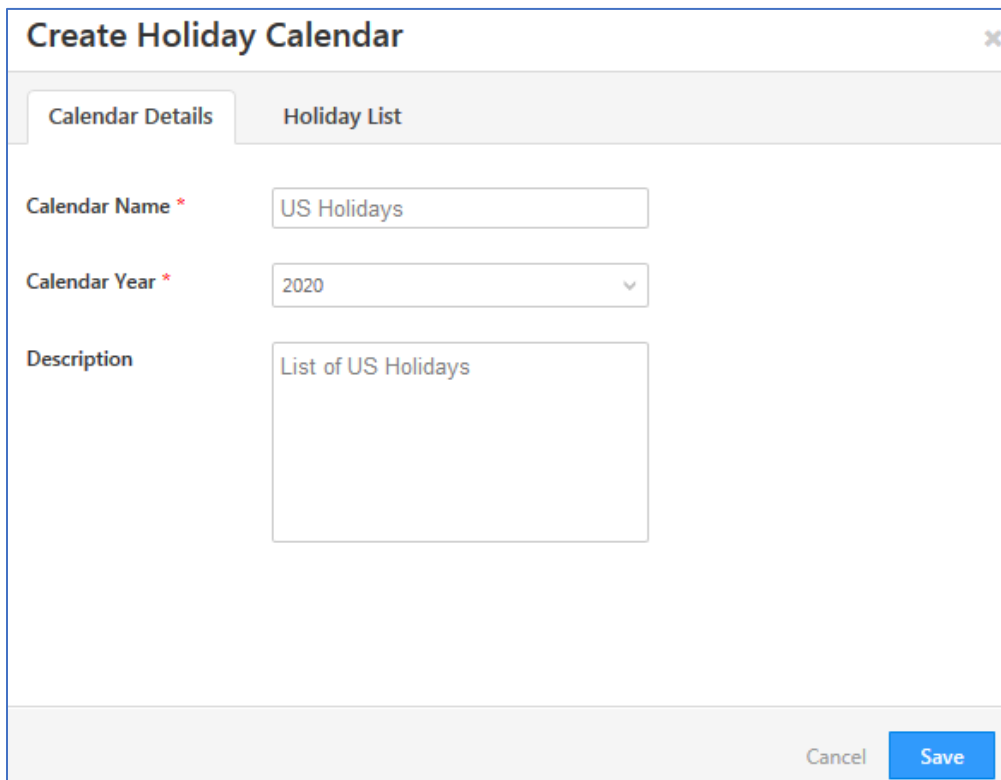
Here's how you create the holiday calendar:

Step 1: Navigate to User and Permissions → Holiday Calendar and then click on Create



The screenshot shows the 'Holiday Calendar' management interface. At the top, it says 'Holiday Calendar' with a help icon and 'Manage the Holiday Calendar(s) for your organization.' Below this is a large empty space. On the right side, there is an 'Actions' dropdown menu. At the bottom, there is a 'Year' dropdown menu set to '2020' and a blue 'Create' button.

Step 2: Under the Calendar Details tab provide Calendar Name and select the Calendar Year along with description (optional)



The screenshot shows the 'Create Holiday Calendar' form. It has two tabs: 'Calendar Details' (selected) and 'Holiday List'. Under the 'Calendar Details' tab, there are three fields: 'Calendar Name' with the value 'US Holidays', 'Calendar Year' with a dropdown set to '2020', and 'Description' with the value 'List of US Holidays'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Step 3: Click on Holiday List tab. Here's where you add the specific days you want to add as holidays

#	Name	Date
1	New Year	01/01/20
2	Independence Day	07/04/20
3	Christmas	12/25/20
4	Black Friday	11/27/20

+Add

Step 4: Click on Save

Step 5: To assign Holiday Calendar to teams, hover over the Actions button displayed on the Holiday Calendar page. Click on Assign Team option.

Holiday Calendar ?



Manage the Holiday Calendar(s) for your organization.

Year: 2020

Actions

Assign Team

In our current case we need to apply the holiday calendar to 'Sales Manager' team. Click on pencil icon next to Sales Manager team and select "US Holidays" calendar from the dropdown.

Apply Holiday Calendar		
Teams	Calendar	Actions
▼ Sales Manager	US Holidays - 2020	 
● Marketing Team	US Holidays	(i)
▼ Team Leaders	US Holidays	(i)
● Sales User Non Priority	US Holidays	(i)
● Sales User Priority	US Holidays	(i)

Step 6: Click on Save icon, highlighted in the screenshot above.

Next Steps

Create a holiday calendar with the main Indian holidays (atleast2) and apply it to 'Marketing Team'

Smart Views

The Smart Views page lets you access your 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 Users a single work area for accessing accounts, leads, activities and tasks.
- Provides a better alternative to quick filters – you can view your saved filters as tabs and apply filters and sort orders per tab.
- Shows you the count of leads on each tab.
- Automatically refreshes so your tabs are always updated.

Administrators can create smart views and assign them to different teams. As an admin, this gives you control over the views each of your teams see. With this feature, you can show your teams only those accounts, leads, activities and tasks relevant to them.

As an admin, you can manage Smart Views by navigating to Settings→Leads→ Smart Views.

Note: Apart from the Smart Views created by the admin, each sales user can make his own tabs. This will be reflected on his account only.

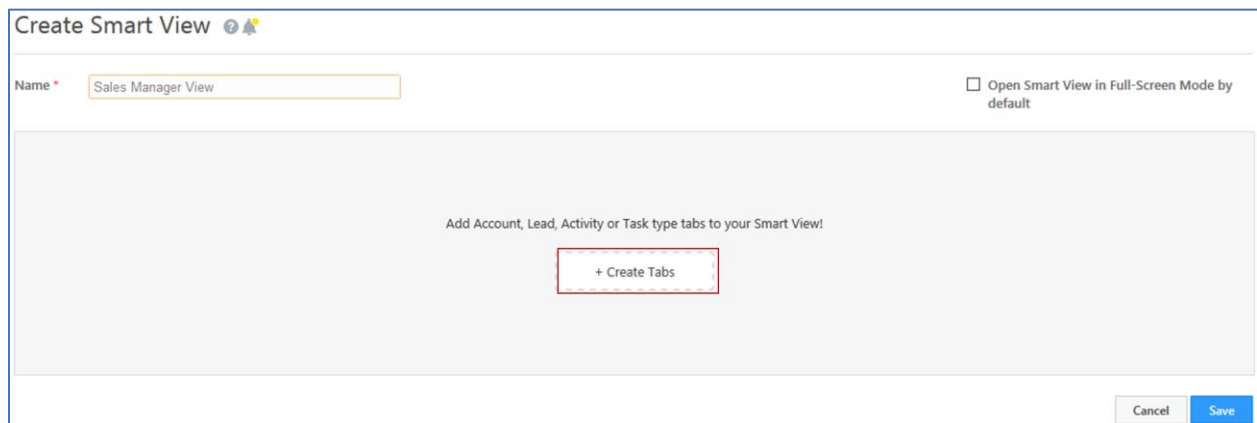
Let us create a Smart View called 'Smart View Sales Manager' for team 'Sales Manager' so that whenever Nick Fury who is part of this team logs into Smart Views, he will see

1. All the leads whose lead stage is in 'Prospect'
2. Pending Follow Up Tasks

Step by Step: Setting up Smart View for Teams

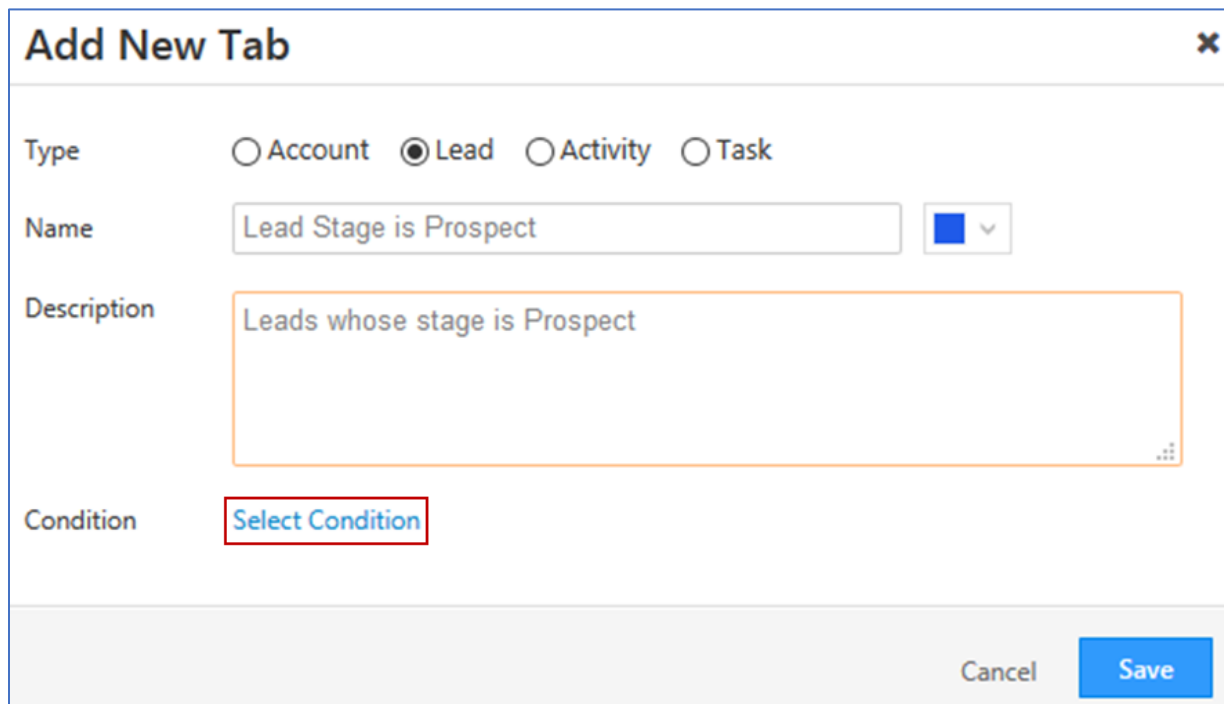
Step 1: Navigate to **Settings**→**Leads**→**Smart Views** and click **Create**.

Step 2: Enter a name 'Sales Manager View' for the new smart view tab, then click **Create Tabs**.



The 'Create Smart View' dialog box shows a text input field for 'Name' containing 'Sales Manager View'. To the right is a checkbox labeled 'Open Smart View in Full-Screen Mode by default'. Below these is a large grey area with the text 'Add Account, Lead, Activity or Task type tabs to your Smart View!' and a red-outlined button labeled '+ Create Tabs'. At the bottom right are 'Cancel' and 'Save' buttons.

Step 3: Select type as Lead, then name it 'Lead Stage Is Prospect' and give a description saying 'Leads whose stage is Prospect' then click on 'Select Condition'



The 'Add New Tab' dialog box has a title bar with a close button. It contains four radio buttons for 'Type': 'Account', 'Lead' (which is selected), 'Activity', and 'Task'. Below this is a 'Name' field with 'Lead Stage is Prospect' and a blue color selection dropdown. The 'Description' field contains 'Leads whose stage is Prospect'. The 'Condition' field has a red-outlined button labeled 'Select Condition'. At the bottom right are 'Cancel' and 'Save' buttons.

Step 4: When choosing the condition, select Lead Stage is Prospect and click on 'Add'. Once the criteria are added in the right column click on 'Set Criteria'

Select Criteria ? ▶

Select Search Criteria

Lead Stage ▼

Is ▼

Prospect ▼

+ Add Reset

Search for Leads that match ☒ Any Criteria ☐ All Criteria

Lead Stage is "Prospect"

Set Criteria Cancel

Step 5 : Click on Save

Step 6: To add a new tab move the mouse towards a downward arrow on the right corner and hover on it. In the options shown select '**ADD NEW TAB**'

Lead Stage is Prospect Details

Search Leads [q] Any Stage ▼ Any Source ▼ Any Owner ▼ Last Activity ▼ All Time ▼

Lead Name	Lead Score	Lead Stage	Owner	Modified On
-----------	------------	------------	-------	-------------

Visible Tabs

Lead Stage is Prospect

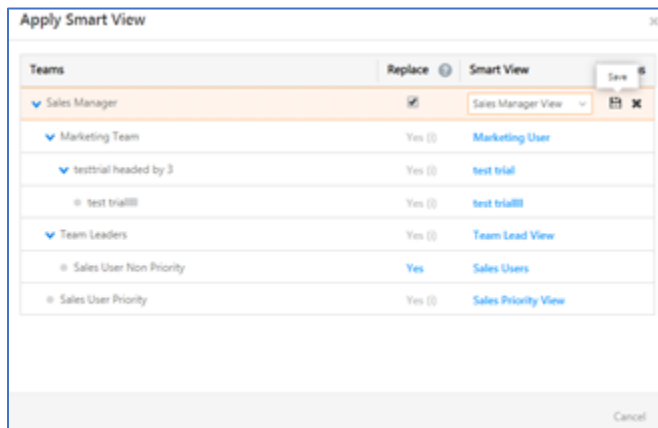
ADD NEW TAB

Step 7: Select the type as Task, name it as 'Pending Follow Up Tasks' and give the same description. Then select the task type as 'Follow Up' and the task view as 'list'

Step 8: Click on Save

Step 9: Hover around actions and in the options select 'Apply Teams'

Step 10: Click on pencil icon and in the dropdown select 'Sales Manager view' and click on the floppy disk to save



Next Steps

Create a Smart View for 'Team Leaders' and 'Sales User Non Priority'.

The Smart View for Team Leaders should have the following two tabs:

1. List of Leads with lead score more than 50
2. Pending "All Tasks"

The Smart View for Team Leaders should have the following two tabs:

1. List of Leads with lead score less than 50
2. Pending "Follow Up" tasks

Check-in Check-out

You can 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. It can be achieved using automations which we will cover later in the course

Here's how you configure the feature

Step by Step: Configuring Check-in – Check-out

Step 1: Navigate to Users and Permissions and click on 'User Check in' tab. Here we get to configure and tell the system who should check in and who needn't. We can apply it to Roles and Sales groups. In our case let's enable check-in for all Sales User and disable it for certain users like Tony and Steve.

Step 2: Enable Check in and click on Configure button.

User Check-in ?
Configure Check In and Check Out feature to help you in tracking user attendance and availability

Show check-in widget to web users ?
Log and track User Attendance and Availability by enabling users to Check In and Out of work on LeadSquared.

Enabled

Configure

Step 3: In the pop-up, Enable User Check-in for Sales Users

Configure User Check-in Feature x

Select Roles to enable User Check-In for.

Role	User Check-In
Administrator	<div>Disabled</div>
Marketing User	<div>Disabled</div>
Sales Manager	<div>Disabled</div>
Sales User	<div>Enabled</div>

+ Exclude Users from selected Roles

0 User/s excluded.

Step 4: Now to disable User Check-in for certain users click on 'Exclude Users from selected Roles'

Sales User

Enabled

+ Exclude Users from selected Roles

0 User/s excluded.

Step 5: Move Tony and Steve from User List box to User Exceptions box and click on 'Add Exceptions'

Configure User Check-In Feature

Add exceptions to enabled Roles

Enabled for : **Sales User**

Role : **All**

User List

Type here to search

- Carol Susan
- Natasha Romanoff
- Peter Parker
- Sam Wilson
- Scott Lang
- Thor Odinson

User Exceptions

Type here to search

- Tony Stark
- Steve Rogers

2 User/s excluded.
User checkin will not be enabled for these users.

Cancel **Add Exceptions**

Step 6: Once configured click on Done to 'save'

Next Steps:

Enable 'User Check-in' for Administrator and Sales Manager. Add Thor and Carol as exceptions.

Chapter 5: Creating Lead fields and Dependent 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 numbers etc. We can see the different Lead Fields from Lead details under V-card of the lead.

Stephen Vincent Strange
New Superheroes
Doctor@LeadSquared.com
+1-9123123132

-50 Lead Score 0 Disengaged 8/10 Lead Quality

Lead Properties

Superhero Po...	Immortality
Order Value	0.00
Lead Age	12 Days
Lead Source	Referral Sites

Lead details

Lead Number	1084
First Name	Stephen Vincent
Last Name	Strange
Email Id	Doctor@LeadSquared.com
Superhero Name	Dr. Strange
Do Not SMS	No
Do Not Track	No
Do Not Email	Yes
Do Not Call	No
Lead Source	Referral Sites
Mobile Number	+1-9123123132

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.

Step by Step: Creating Lead Fields

We will carry out a step by step procedure on how to create a lead field. Say we need to capture the following fields: Superhero Powers, Superhero ID, Origin City, Origin Country, Arch Nemesis with their different data inputs.

Step 1: Navigate to Lead Fields from Settings → Leads → Lead Fields

First check by searching the field if the system already contains it, if not click on 'Create'.

Settings Search Settings

Profile	Lead Settings
Users and Permissions	Lead Fields
Security	Dependent Lead Fields
Accounts	Lead Stages
Leads	Lead Sources
Mobile App	Views
Lead Tracking	Smart Views

Lead Fields Manage custom lead fields for your account

Search Lead Fields View: All Type: All Create

Display Name	Schema Name	Field Type	Data Type	Meta Info	Created By	Actions
Account	RelatedCompanyId	System	Text	✱ ⓘ ⚙️ ⬇️ ⓘ ⚙️	Peeyush Pavanan	⚙️
Conversion Referre...	ConversionReferrerURL	System	Text	✱ ⓘ ⚙️ ⬇️ ⓘ ⚙️	System	⚙️

Step 2: Define the display name as 'Superhero Power'.

Step 3: Choose the data type of the field. In our specific case we need the user to enter the information in multi select dropdown format. Hence, the Data Input Type will be Multi-select Dropdown. Select the Lead Field in Section as Lead Details.

Custom Lead Field

Internal Schema Name: mx_Superhero_Powers

Display Name *: Superhero Powers

Mail Merge Default Value:

Input Data Properties

Data Input Type: Multi-select Dropdown

Show as: Multi-select Dropdown

Set each option in new line

- Super Strength
- Bulletproof
- Self Healing
- Flight
- Immortality
- Agility
- Super Speed

The other types of data types include:

1. Text: Textbox or Text area
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

Step 4: Enter the following values for 'Superhero Powers':

- Super Strength
- Bulletproof
- Self-Healing
- Flight
- Immortality
- Agility
- Super Speed
- Travels in Space

Step 5: Define properties of the Lead Field.

Lead Field Property	Explanation
Is Mandatory	Selecting the check box will make the lead field mandatory, i.e. the user will not be able to create the lead record without filling in details in this field.
Show in Quick Add	Selecting the check box enables this field to appear when you are filling lead details through the <i>Quick Add Lead</i> option.
Show in Import	Selecting the check box will enable the user to map this field when importing lead information through the <i>Import Lead</i> option.
Include in Mail Merge	Selecting the check box will allow you to include this custom field in the mail merge field for message personalization while drafting emails for Email Campaigns.
Use in Lead Clone	The field value for the existing leads will be pre-populated while creating new lead via Lead Cloning.
Lock After Create	Selecting the check box will restrict Non-admin users to update the value of this field once a lead is created.

For Superhero Powers, enable “Show in Import” and “Use in Lead Clone”.

Step 6: if we need to add more lead fields for capturing data according to the business requirement click on ‘Save and Add New’, else click on ‘Save’.

Next Steps

Create 4 different Lead fields for capturing the different details

Lead fields	Data type	values
Origin country	dropdown	US England India Netherlands Wakanda
Origin city	dropdown	-----
Superhero ID	number	
Arch nemesis	text	

Note: do not fill any values for Origin City. We will work on that during creation of Dependent Lead Fields

Dependent Lead Fields

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 one as the 'parent field' and the other as 'child field' respectively. This dependency can be used in the various Lead Create forms of LeadSquared.

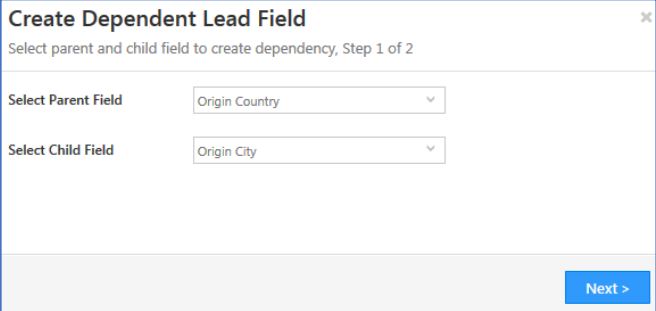
Step by Step: Creating Dependent Lead Fields

As per S.H.I.E.L.D. Insurance Ltd., they requested to create dependency between Origin Country and Origin City. We choose the parent field as 'Origin Country' and 'Origin City' as the child field. We give in the following values

US	New York Washington DC Boston California Vegas
England	Chelsea Manchester London
India	Mumbai Delhi Bangalore
Wakanda	Birnin Zana
Netherlands	Amsterdam Rotterdam

Step 1: Navigate to Dependent Lead Fields from Settings → Leads → Dependent Lead Fields. Click on 'Create'.

Step 2: Select the parent field as Origin Country and child field as Origin City. Click Next



Create Dependent Lead Field ✕

Select parent and child field to create dependency, Step 1 of 2

Select Parent Field

Select Child Field

Next >

Step 3: In the next step, parent field value will be prepopulated, but the child field must be manually entered.

Update Dependent Lead Field

Map Parent and Child dropdown fields

Select a Origin Country

(0)

US(6)

England(4)

India(0)

Wakanda(0)

Netherlands(0)

Provide Origin City values for US?

New York

Washington DC

Boston

California

Vegas

Unsaved parent field values

Cancel

Save

Step 4: Click on Save. Dependency between Origin Country and Origin City has been created.

Chapter 6: Lead Sources and Lead Stages

Lead Stages

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.

We will see the step wise procedure to add/ edit the different lead stages as per the business requirements.

For S.H.I.E.L.D. Insurance Ltd., will be creating the following active lead stages called 'New Superheroes' (default/the starting stage), 'Opportunity' and 'Onboarded Superheroes' (last stage) and create the following inactive stages 'Invalid', 'Disqualified' and 'DC universe'. If any other lead stage is present, we can delete it.

Step by Step: Creating Lead Stages

Step 1: Navigate to Settings → Leads → Lead Stages. Here we can see two columns, one for Active Stages and one for Inactive Stages.

- The **Active Stages** are linked to the **Overall Lead Funnel**.
- Disqualified leads can be categorized into Inactive Lead Stages like Invalid, Not Interested etc.

Step 2: Hover over the available stages to edit them, delete them or to change their respective orders or click on 'Add' to add more stages. Delete all the existing active stages except Opportunity and Customer (you cannot delete the final stage but only rename it.)

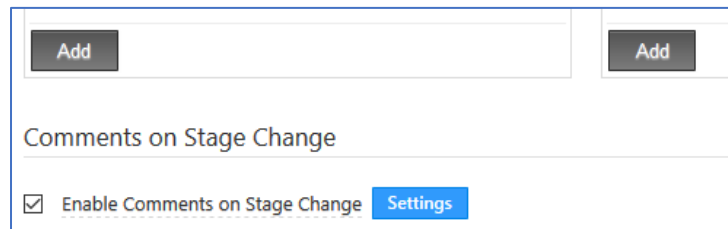
We need 'New Superheroes' as our default (red). Since, it does not exist yet, click on Add button under Active Stages and create 'New Superheroes' as the new stage and make it the default stage.

The screenshot shows the 'Lead Stages' management interface. At the top, there's a header 'Lead Stages' with a help icon and a subtitle 'Manage Lead Stages'. Below this, there are two input fields: 'Schema Name' with the value 'ProspectStage' and 'Display Name' with the value 'Lead Stage'. The interface is divided into two main columns: 'Active Stages' and 'Inactive Stages'. The 'Active Stages' column contains three stages: 'New Superheroes' (highlighted in red), 'Prospect', and 'Onboarded Superheroes' (highlighted in green). The 'Inactive Stages' column contains three stages: 'Disqualified', 'Invalid', and 'DC Universe'. At the bottom of each column, there is an 'Add' button.

Step by Step: Configure Comments on Stage Change

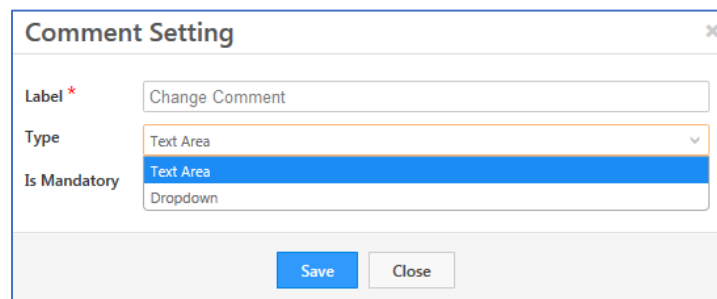
Comments on Stage Change will enable Users to add a Note/Reason while changing the Lead's Stage in your Sales/Marketing Funnel

Step 1: To enable comments on Stage Change, select the checkbox Enable comments on Stage Change under Lead Stages.



Step 2: Click on 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.



Step 3: Click Save to complete configuration

NOTE: Default stages are marked with red arrow and the last stage is marked green.

Next Steps

Create Following Active Stages:

- Prospect (Active Stage)
- Opportunity (Active Stage)
- Villains (Inactive Stage)
- Disqualified (Inactive Stage)
- DC Universe (Inactive Stage)

Rename the Final stage as Onboarded Superheroes from Customer.

Lead Sources

Lead sources are the avenues through which leads come to your website. You can add, remove and customize your lead sources.

By default, the lead sources are in dropdown format.

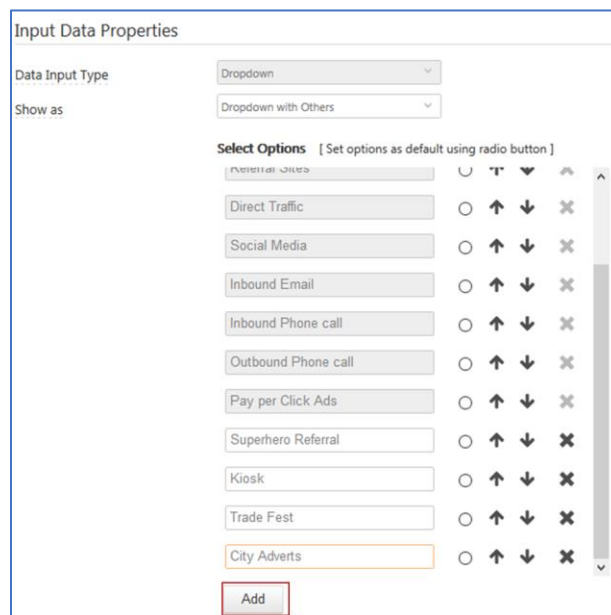
Step by Step: Creating Lead Sources

Step 1: Navigate to Settings → Leads → Lead Sources. We can add new sources, delete the sources or move the order around. The system sources cannot be deleted.

Step 2: Click on Add to add new Lead Sources.

Note: by default, the system captures all the online methodologies which cannot be deleted manually.

Step 3: Add different offline sources like 'Superhero Referral', 'Kiosk' and 'Trade Fest'.



The screenshot shows the 'Input Data Properties' form. At the top, 'Data Input Type' is set to 'Dropdown' and 'Show as' is set to 'Dropdown with Others'. Below this is a section titled 'Select Options' with a subtitle '[Set options as default using radio button]'. It contains a list of lead sources: 'Direct Traffic', 'Social Media', 'Inbound Email', 'Inbound Phone call', 'Outbound Phone call', 'Pay per Click Ads', 'Superhero Referral', 'Kiosk', 'Trade Fest', and 'City Adverts'. Each source has a radio button, up/down arrows, and a delete 'X' icon. The 'City Adverts' source is highlighted with an orange border. An 'Add' button is at the bottom.

Step 4: Click on Save

Types of Dropdown: You can have

1. Searchable dropdown. You can key in the text field and see the relevant options available, matching the letters entered
2. Dropdown with others. This dropdown field will have Others as a default option along with the list of options provided.

Next Steps

Create two more offline methodologies - 'Print Adverts' and 'Outbound Calls' to capture leads into LeadSquared system.

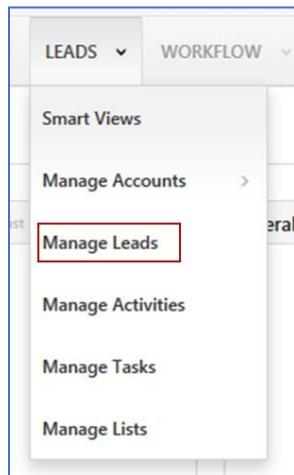
Chapter 7: Manage Leads, Import Leads and Manage Lists

Import leads

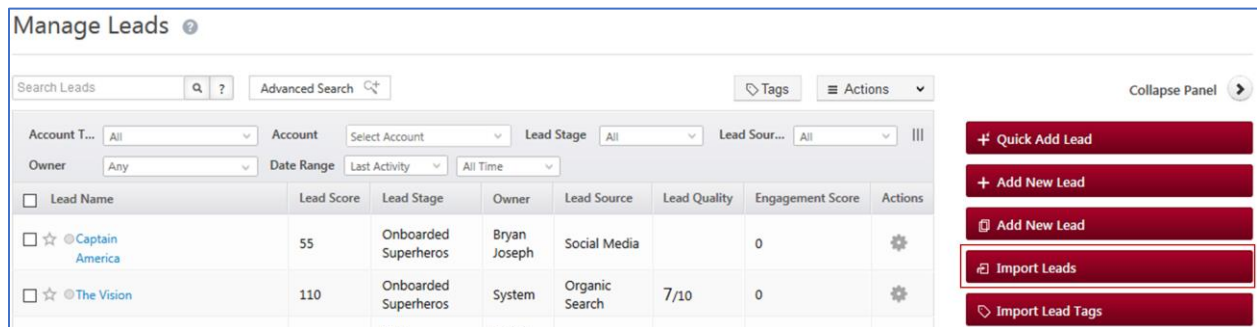
The Import Leads button allows the end user to import the leads from the CSV files to LeadSquared. This functionality comes handy if you must bulk import or update the Leads.

Step by Step: Importing Leads to LeadSquared

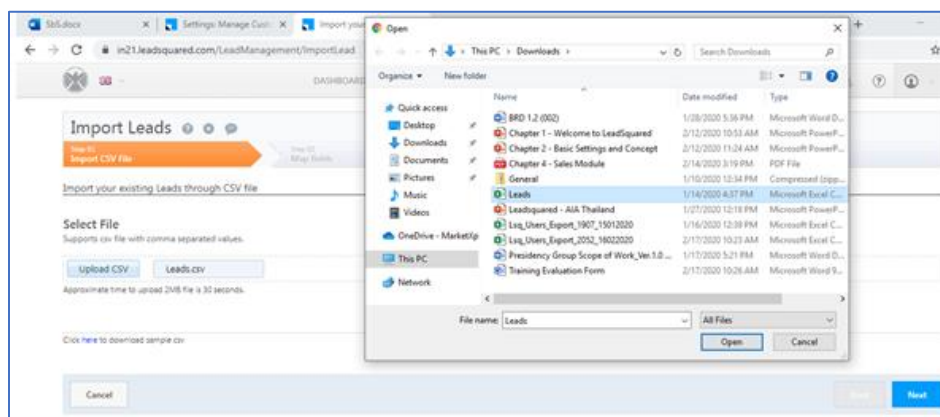
Step 1: On the top bar hover around Leads and from the dropdown select 'Manage Leads'.



Step 2: On the Manage Lead page, click on Import Leads



Step 3: Import the CSV File shared with you during the training by clicking on Upload CSV button.



Step 3: Map the CSV file columns with LeadSquared Lead Fields. If a field in your CSV file doesn't exist like **Superhero Name** in your LeadSquared account, hover over the field mapping and click on Create New Field, define the field properties. In this case, it will be text. Click on Save to create the field.

Step 4: 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.

Handling of duplicate leads 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	<p>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</p> <ul style="list-style-type: none"> • 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.

In our case, select **Ignore Duplicates**.

Step 5: 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. Select System as the Lead Owner.
- 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.

Step 6: Click on Next to see the summary.

Manage Lists

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

LeadSquared allows you to create two types of lists:

- Static List
- Dynamic List

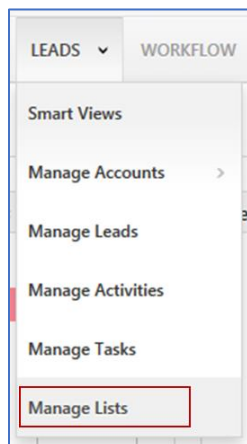
Static List has fixed number of Leads. The list can only be changed by manually deleting, adding or importing Leads.

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.

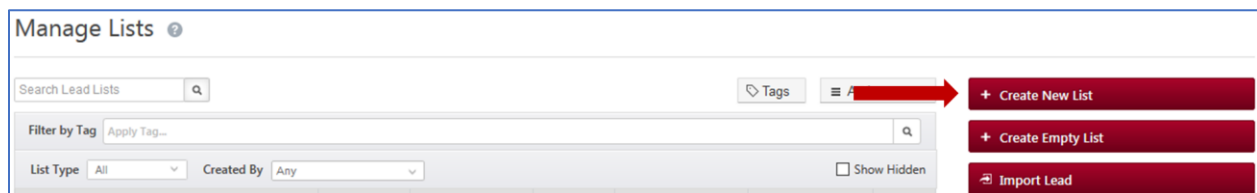
Let us create a dynamic list to capture all the leads whose lead stage is 'New Superheroes'.

Step by Step: Creating Lead List

Step 1: Hover on 'Leads' in the top bar, select 'Manage Lists' from the dropdown.



Step 2: Click on 'Create New List' to create one from scratch. You can also access the different lists created from here.



Step 3: Define the condition as “Lead stage is ‘New Superheroes’”, then click on ‘Find Leads’.

The screenshot shows the 'Create New List' dialog with the 'Select Search Criteria' section. The criteria 'Lead Stage is New Superheroes' is selected and highlighted in a red box. The 'Find Leads' button is also highlighted in a red box. The 'Any Criteria' radio button is selected.

Lead Stage is New Superheroes

Find Leads

Step 4: Click ‘Save as Dynamic List’ button to save the list as Dynamic List.

The screenshot shows the 'Create New List' dialog with the 'Save as Dynamic List' button highlighted in a red box. Below the buttons is a table of leads.

Name	Email Address
T'Challa	Black@LeadSquared.co...
Stephen Vincent Stra...	Doctor@LeadSquared.c...
Clint Barton	Hawkeye@LeadSquared...
Bruce Banner	Hulk@LeadSquared.com
Bucky Barnes	Winter@LeadSquared.c...

Step 5: Provide List name: “Fresh Leads”. Click on Save

The screenshot shows the 'Create New List' dialog with the 'Save search criteria as Dynamic List' section. The 'List Name' field is filled with 'Fresh Leads' and highlighted in a red box. The 'Save' button is also highlighted in a red box.

Save search criteria as Dynamic List

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

List Name: Fresh Leads

Save

Next Steps

Create a new dynamic list of leads having the “Lead Score less than or equal to 100”.

Chapter 8: Custom Activities and Core Activities

Activities are different Action points or steps to complete the business flow. For example: Follow Up, email opened by the lead, website visit by the lead etc.

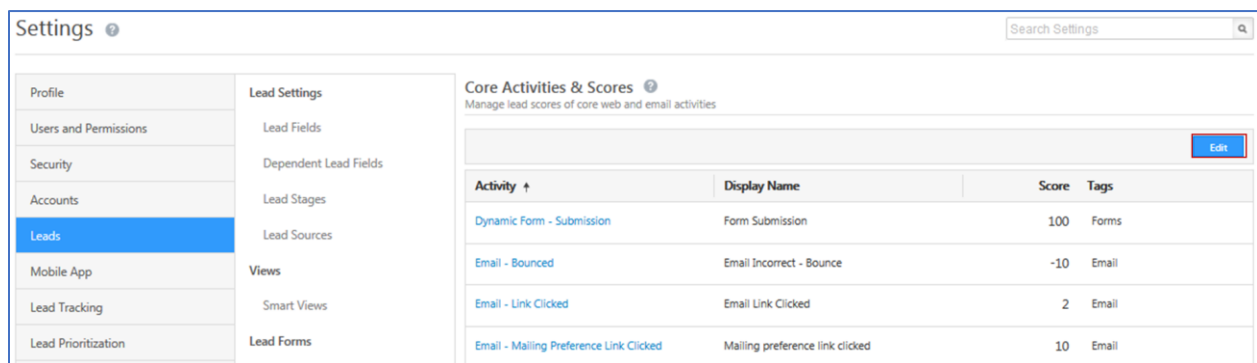
Core Activity

System provided activities are called core activities which cannot be deleted. They can be renamed, and their activity score can be changed.

Step by Step: Customizing Core Activity

Step 1: Navigate to Settings → Leads → Core Activities and Scores

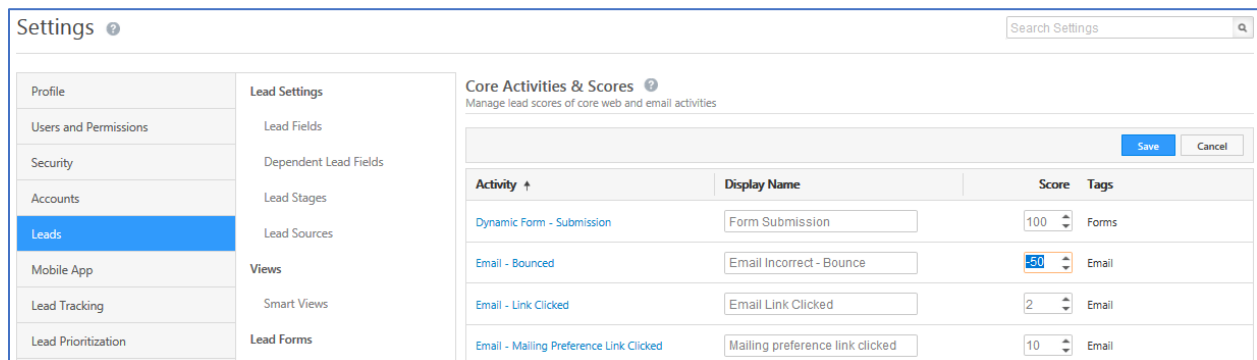
Step 2: Click on 'Edit' in top right corner.



The screenshot shows the 'Settings' page with the 'Leads' section selected. The 'Core Activities & Scores' table is displayed, showing a list of activities with their display names, scores, and tags. The 'Edit' button is highlighted in the top right corner of the table.

Activity ↑	Display Name	Score	Tags
Dynamic Form - Submission	Form Submission	100	Forms
Email - Bounced	Email Incorrect - Bounce	-10	Email
Email - Link Clicked	Email Link Clicked	2	Email
Email - Mailing Preference Link Clicked	Mailing preference link clicked	10	Email

Step 3: Edit the score of Email Bounced to '-50'.



The screenshot shows the 'Settings' page with the 'Leads' section selected. The 'Core Activities & Scores' table is displayed, showing a list of activities with their display names, scores, and tags. The 'Email - Bounced' row is selected, and the score is being edited to '-50'.

Activity ↑	Display Name	Score	Tags
Dynamic Form - Submission	Form Submission	100	Forms
Email - Bounced	Email Incorrect - Bounce	-50	Email
Email - Link Clicked	Email Link Clicked	2	Email
Email - Mailing Preference Link Clicked	Mailing preference link clicked	10	Email

Step 4: Click on 'Save'.

Next Steps

Edit the core activity 'Email - link clicked' and set the score to '50'.

Custom Activity

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.

Step by Step: Creating Custom Activity

Let's create the custom activity for S.H.I.E.L.D called

- 'Call Disposition' (to capture call information between User and Lead),
- 'Document Collection' (for uploading documents for Insurance),
- 'Change Priority' (for changing the priority status of the Lead and re-assignment of lead based on the same).

'Call Disposition' activity will be created with the 5 custom fields to capture-

Custom fields	Data type	Values
Notes	String	
Status	Dropdown	Active Inactive
Owner	User	
Disposition	Dropdown	Interested Not Interested No Response Wrong Number Cannot Connect
Sub Disposition	Dropdown (dependent)	

'Sub Disposition'(dropdown), make it a dependent dropdown with the following information. Parent field for Sub Disposition will be Disposition.

Parent Field Value	Child Field Value
Interested	Health Insurance Life Insurance Third Party Insurance
Not Interested	Price is too high Got better offers
No Response	Follow Up
Wrong Number	Email Valid Email Not Valid
Cannot Connect	Follow Up Busy Not Picking the call

Step 1: Navigate to Settings → Leads → Custom Activities & Score

Step 2: Click on 'Add'

Step 3: Give the name 'Call Disposition'. Leave the score as blank. Tick the checkboxes for 'Log Activity Changes', 'Show in Activity List', 'Lock Activity' and lock it for the Sales Users.

Update Custom Activity Type

Custom Activity Type Details, Step 1 of 3...

Name *

Call Disposition

Description

Score

0

Direction

☒ Inbound
 ☐ Outbound

Delete Activity

☐

Track Location

☐

Log Activity Changes

☒

Allow pre-dated Activities

☐

Show in Activity List

☒

Allow Attachments

☐

Quick Add

☐

Lock Activity

☒

Sales User

Step 4: Click 'Next'

Step 5: Add the custom fields which are missing from the requirements. In this case we need to add 'Disposition' and 'Sub Disposition'. Click on 'Add field'.

Step 6: Add a custom field 'Disposition' and keep the data type as Dropdown. Click on the gear icon next to it to add the values.

Display Name	Schema Name	Type		Mandatory
Notes	ActivityEvent_Note	String		<input type="checkbox"/>
Status	Status	Dropdown		<input type="checkbox"/>
Owner	Owner	User		<input type="checkbox"/>
Disposition	mx_Custom_1	Dropdown		<input type="checkbox"/>

Step 7: Add the following 5 values. (Note: this is not a dependent field)

1. Interested
2. Not Interested
3. No Response
4. Wrong Number
5. Cannot Connect

Enter Dropdown Options [Close]

Is Dependent Field?

Enter options

Interested
Not Interested
No Response
Wrong Number
Cannot Connect

(The option at the top will be default)

Step 8: Click on 'Save'

Step 9: Add a new field and call it 'Sub Disposition' with datatype as Dropdown. Click on the gear icon to add the values of the dropdown.

Step 10: Keep it as a dependent field and tell the system that the parent field is 'Disposition'. Add the values given in the requirement shared above for each value as shown.

Enter Dropdown Options [Close]

Is Dependent Field?

Select Parent Field: Disposition

Select Disposition

Interested	(4)
Not Interested	(3)
No Response	(2)
Wrong Number	(3)
Cannot Connect	(4)

Provide Sub Disposition value

Health Insurance
Life Insurance
Third Party Insurance

[Close] [Save]

Step 11: After adding the Sub Disposition values to each dropdown click 'Save'

Step 12: Click 'Next'

Step 13: In this step, you will define the form for Call Disposition activity which tells the system how the UI should look to the end user. Which fields should be shown, and which shouldn't? We'll select all but 'Status' and 'Owner' field. Drag them under Available Fields.

Step 14: Click ‘Save’ to create the activity.

Next Steps

Create two more Custom Activities ‘**Change Priority**’ and ‘**Document Collection**’

[The requirement for ‘Change Priority’](#)

User should be able to ‘Delete Activity’, ‘Allow pre-dated Activities’ and ‘Log Activity Changes’.

Custom fields	Data type	Value
Priority Status Change	dropdown	Non Priority Priority

And to the end user all the fields should be available barring ‘Status’ and ‘Owner’.

[The requirement for ‘Document Collection’](#)

User should be able to ‘Delete Activity’, ‘Allow pre-dated Activities’ and should be able to “Track Location”.

Custom fields	Data type	Value
Passport ID	String	
Credit Report ID	String	
Social Security Number	String	

Let all the fields be available to the end user except for ‘Status’ and ‘Owner’.

Chapter 9: Lead Prioritization

Lead Prioritization

Lead prioritization is simply separating quality **leads** from junk ones, so that you can reach out to the ones that are most 'likely to buy' first.

We discuss here about lead score, lead quality criteria and engagement score.

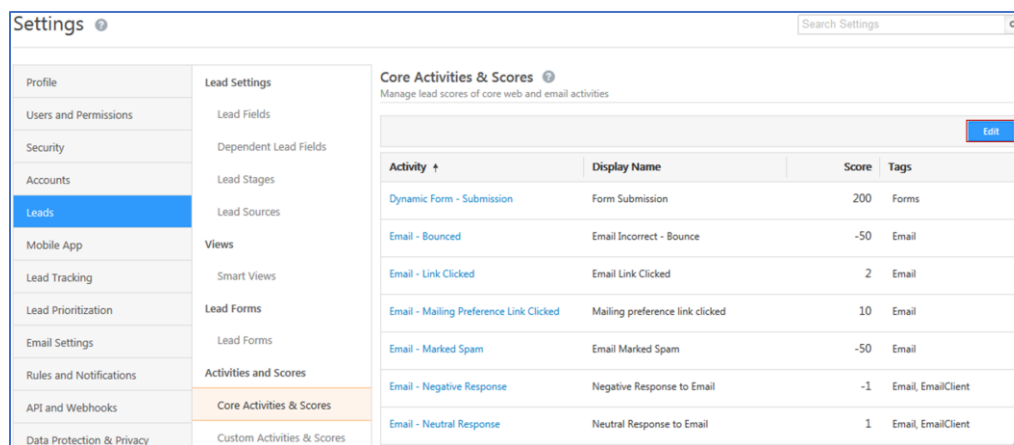
Lead score is the measure of Lead activity in response to your marketing offers. An engaged Lead interacts with you online or offline. These interactions are essentially Lead activities with varied level of importance.

The most important aspect of Lead Scoring is the weight you assign to each activity.

Step by Step: Defining Lead Score

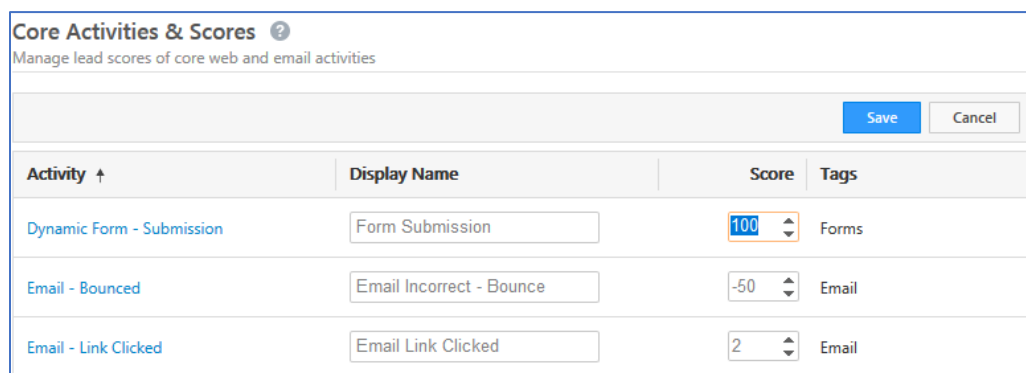
Step 1: In settings go to Leads, under Leads click on Core Activities & Scores or Custom Activities & Scores depending on what activities we need to adjust the score for.

Step 2: Click on Core Activities & Scores. Click on Edit on the top right corner of the screen



Activity	Display Name	Score	Tags
Dynamic Form - Submission	Form Submission	200	Forms
Email - Bounced	Email Incorrect - Bounce	-50	Email
Email - Link Clicked	Email Link Clicked	2	Email
Email - Mailing Preference Link Clicked	Mailing preference link clicked	10	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

Step 3: Change the score of Dynamic Form – Submission to 100



Activity	Display Name	Score	Tags
Dynamic Form - Submission	Form Submission	100	Forms
Email - Bounced	Email Incorrect - Bounce	-50	Email
Email - Link Clicked	Email Link Clicked	2	Email

Step 4: Click on Save.

Lead Engagement Score

The lead engagement score is a time-bound measure of a lead's interest in your business.

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.

Let's set the engagement score for all the leads in 'New Superheroes' stage interacting with all the activities over the last 45 days.

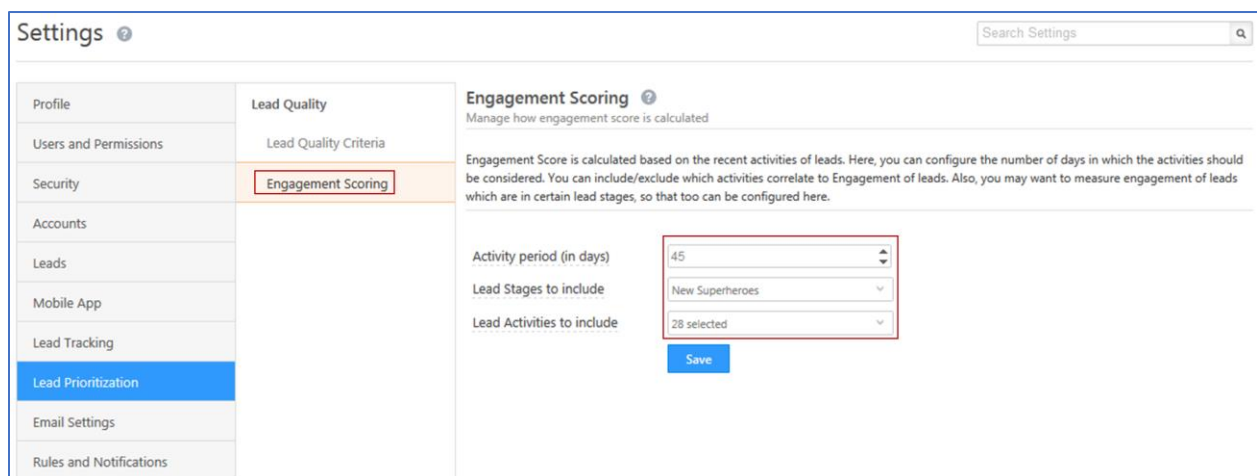
Step by Step: Configuring Engagement Scoring

Step 1: Navigate to Settings → Lead Prioritization → Engagement Scoring

Step 2: Set the number of recent days for which it should be calculated on to 45

Step 3: Select Lead stages for which the score should be calculated on, in our case select 'New Superheroes'

Step 4: Select the activities based on which engagement scoring will be done. Right now, select all the activities present.



The screenshot shows the 'Settings' application interface. On the left is a sidebar menu with options: Profile, Users and Permissions, Security, Accounts, Leads, Mobile App, Lead Tracking, Lead Prioritization (highlighted in blue), Email Settings, and Rules and Notifications. The main content area is titled 'Engagement Scoring' with a subtitle 'Manage how engagement score is calculated'. Below this, there is explanatory text: '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.' There are three configuration fields: 'Activity period (in days)' set to 45, 'Lead Stages to include' set to 'New Superheroes', and 'Lead Activities to include' set to '28 selected'. A red box highlights these three fields and the 'Save' button below them. At the top right of the settings area is a 'Search Settings' search bar.

Step 5: Click on Save

Lead Quality Criteria

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.

Step by Step: Configuring Lead Quality Score

Step 1: To setup Lead Quality, navigate to: Settings → Lead Prioritization → Lead Quality Criteria and click on Create





Step 2: Once there select the attributes on which you want the system to calculate. For our exercise lets choose Superhero Powers and Lead score.

Step 3: Assign the weightage of the selected attributes, so click on the pencil icon next to each attribute. S.H.I.E.L.D. want 80 % weightage for Superhero Powers, and 20% to Lead Score.

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 (%)	
Superhero Powers	<input checked="" type="checkbox"/>	80	 
Lead Score	Yes	20	 

2 Attributes 100

☐ Assign weightage equally across the attributes

[Define Attribute Score >](#)

Step 4: Click on Define Attribute Score button and set the attribute score for Superhero Powers, by weighing the highest to lowest among the given powers. See the screenshot given below to assign scores for Superhero Powers



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.

Superhero Powers

Lead Score

When Superhero Powers **Is** **Immortality** Score = 10  

☐ Super Strength

☐ Bulletproof

☐ Self Healing

☐ Flight

☒ Immortality

☐ ...



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.



Superhero Powers



Lead Score

When Superhero Powers **Is Immortality** Score = 10  

When Superhero Powers **Is Travels in Space** Score = 9  

When Superhero Powers **Is Self Healing** Score = 8  

When Superhero Powers **Is Bulletproof** Score = 7  

When Superhero Powers **Is Flight** Score = 6  

Step 5: Set the scores for Lead Score attribute.

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.

Superhero Powers

Lead Score

Set Attribute Scores

When Lead Score Between 10 & 50 Score = 2

When Lead Score Between 51 & 199 Score = 5

When Lead Score Between 199 & 399 Score = 8

When Lead Score Is Greater Than 399 Score = 10

When Lead Score Is Score =

0

< Back

Save & Publish

Save

Step 6: Click on Save & Publish.

Chapter 10: Custom Field Sets

A custom field set is a group of fields that can be used as a field type in an activity or on a lead.

As we have already created an Activity for 'Document Collection', we will create the custom field set to upload the Passport Copy.

Step by Step: Creating Custom Field Set

Step 1: Navigate to Custom Field Set from Settings → Leads → Manage Custom Field Set. Click on 'Create'.

Step 2: Name it 'Insurance Document' and check 'Activity Integration' because we will be mapping this field set to an activity 'Document Collection'. Click on Next.

The screenshot shows the 'Edit Custom Field Set' dialog box with the title 'Custom Field Set details, Step1 of 3...'. It contains the following fields:

- Name ***: A text input field containing 'Insurance Document'.
- Description**: A large text area for additional details.
- Lead Integration**: A checkbox that is currently unchecked.
- Activity Integration**: A checkbox that is currently checked.

Step 3: Add the field 'Passport Upload' and select the data type as 'file'.

The screenshot shows the 'List of selected fields, Step2 of 3...' dialog box. It contains a table with the following columns: Display Name, Schema Name, Type, and Mandatory.

Display Name	Schema Name	Type	Mandatory
Passport Upload	mx_CustomObject_1	File	<input type="checkbox"/>

Step 4: Click on the gear icon to tell the system what kind of uploads are allowed. We can choose file size up to 1MB and choose the 'Any Document or Images'. Click on 'Save'.

The screenshot shows the 'Enter Default Options' dialog box with the title 'File upload settings'. It contains the following fields:

- Max File Size in MB**: A dropdown menu set to '1'.
- File Type**: A dropdown menu set to 'Any Document or Images'.
- File Extensions**: A text input field containing 'png,jpg,jpeg,bmp,pdf,doc,docx'.
- Allow view on Mobile**: A checkbox that is currently unchecked.

At the bottom, there are 'Close' and 'Save' buttons.

Step 5: Define the fields that will be displayed to the end user. Remove Status field to Available Fields.

Customization of fields layout, Step3 of 3...

Custom Field Set Details	Available Fields
Passport Upload	Status

Step 6: Click on 'Save' and the custom field set is now created. As a next step, we will be mapping it to our Activity.

Step 7: Navigate to 'Custom Activities and Scores' and edit the activity 'Document Collection' by clicking on the pencil icon.

Step 8: Go to step two by clicking Next and create a custom field call 'Document Uploads' and select data type to custom field set 'Insurance Document'.

Update Custom Activity Type

List of selected custom fields, Step 2 of 3...

Display Name	Schema Name	Type	Mandatory
Status	Status	Dropdown	<input type="checkbox"/>
Owner	Owner	User	<input type="checkbox"/>
Passport ID	mx_Custom_1	String	<input type="checkbox"/>
Credit Report ID	mx_Custom_3	String	<input type="checkbox"/>
Social Security Number	mx_Custom_4	String	<input type="checkbox"/>
Document Uploads	mx_Custom_2	Insurance Document	<input type="checkbox"/>

Add Field

< Back Cancel Next >

Step 9: Configure the layout by dragging all the fields to the left and click on 'Save'.

Note: In case of Lead Integration, create the Lead field and have the data type as Custom Field Set as per requirement.

Next Steps

For the recently created Custom Field Set – Insurance Document, add two more fields with name 'Credit Report Upload' and 'Social Security Upload'. The file type should be Any Document or Images with max file size as 1 MB.

Chapter 11: Sales Activity

In LeadSquared, you can capture and track **Sales Activities** that represent Revenue Transactions by adding a Sales Activity to the leads every time a Sale happens.

According to S.H.I.E.L.D. requirements we are selling three insurances

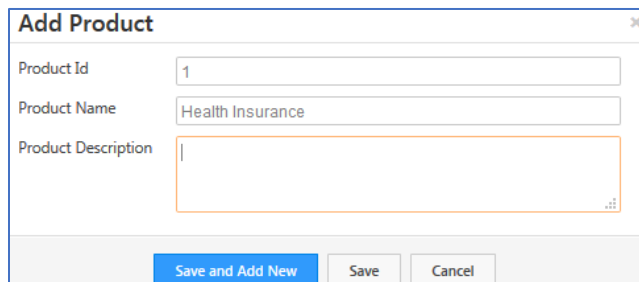
1. Health Insurance
1. Life Insurance
2. Third Party Insurance

We need to tell the software the same, then capture the sale with the respective fields.

Step by Step: Configuring Sales Activity

Step 1: Navigate to Settings → Leads → Manage Products

Step 2: Click on 'Create'. Provide Product ID as 1 and Product Name as Health Insurance



Step 3: Click on Save and Add New button to add other two products one by one: Life Insurance and Third Party Insurance

Step 4: Navigate to Settings → Leads → Sales Activity Fields

Step 5: Click on 'Edit' to add custom fields for the Sales Activity:

Field name	Data type	Value	Show in Form
Insurance Value (Rename Order Value)	Number		Yes
Insurance Purchased On (Rename Sales Date)	DateTime		Yes
Sales done by (Rename Sales Owner)	ActiveUsers		Yes
Interested in other products?	Dropdown	Yes No	Yes
If yes, then which?	Dropdown (dependent)	Yes- Life Insurance Health Insurance Third Party Insurance No - Not applicable	Yes

Step 6: Click on 'Save'

Step 7: Navigate to Settings → Leads → Sales Activity Settings

Step 8: Rename Display name to Insurance Sales. Enable 'Allow Pre Dated Activities' and 'Change lead stage of a lead to 'Onboarded Superheroes' when sales activity is added'.

Sales Activity Settings ?

Manage your sales activity settings like currency, display name and lead stage

Display Name

Insurance Sale

Default Currency

Symbol: \$

Abbreviation: Dlr

Name: Dollar

☐ Log Activity Changes

☒ Allow Pre Dated Activities

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

Save

Cancel

Step 9: Click on Save

Chapter 12: Tasks- Appointments and To Dos

Appointments	To-Dos
Have a definite start and end date and time (14 November 2018 2.p.m to 4 p.m.).	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 appointments include meetings, webinars, demos, presentations, etc.	Examples of to dos include follow ups on old leads, cold calls, in-field address verification, and any task that you don't have to specify an exact time for.

Appointments

Let's create an Appointment called 'sales meeting' and enable it for the organizer and for the lead owners. Capture the following task fields:

Task field	Data type	Values
Meeting Status	Dropdown	Decline Accepted Tentative

To the user all the task fields must be visible except for the task field 'Priority'.

Step by Step: Creating Appointment task type

Step 1: Navigate to Settings → Leads → Appointment. Click on 'create'

Step 2: Put the Name as 'Sales Meeting' and enable Calendar Invites for

1. Organizer
2. Lead Owner

Create Appointment
An appointment is a task which has a fixed start and end time.

Configure

Name * Sales Meeting ▼

Calendar Invites

- ☒ Enable for Organizer [Configure content](#)
- ☒ Enable for Lead Owner [Configure content](#)
- ☐ Enable for Leads

Other Details

Set default duration for the Appointment: 30 minutes ▼

Conflict: Allowed ▼

Reminder: Disable ▼

Include Location: No ▼

Cancel **Create**

Step 3: Click on 'Create'

Step 4: Click on 'Task Fields' tab on the left. Apart from the fields provided add an extra task field to capture 'Meeting Status'. Give the data type as dropdown and give value as per the requirement shared above. Click on Next.

Display Name	Schema Name	Type	Mandatory
Associated Lead	RelatedEntityId	Dropdown	<input type="checkbox"/>
Subject	Name	Text	<input checked="" type="checkbox"/>
Schedule	DueDate	DateTime	<input checked="" type="checkbox"/>
Reminder	Reminder	Dropdown	<input type="checkbox"/>
Description	Description	Text	<input type="checkbox"/>
Organizer	CreatedBy	Text	<input checked="" type="checkbox"/>
Priority	Priority	Dropdown	<input type="checkbox"/>
Meeting Status	mx_Custom_1	Dropdown	<input type="checkbox"/>

Step 5: On 'Form Layout' drag all the fields barring 'Priority' to the left and click on 'Save' to create the appointment task type.

Next Steps

Create an appointment called 'Sales Demo' and enable calendar invite only for Lead Owners. Create the following fields:

Task fields	Data type	Value
Demo status	Dropdown	**Demo attended

Show all the fields in the field layout.

To-Dos

Let's create a to-do called 'Client Meetup' with the following task field requirements

Task field	Data type	Value
Success	Dropdown	** Yes No

Show all the fields in the form layout to the user.

Step by Step: Creating To-Do task type

Step 1: Navigate to Settings → Leads → To-Dos. Click on 'Create'.

Step 2: Give the name as 'Client Meetup' and click on 'Create'.

Step 3: On the navigation, click on 'Task Fields' tab and add a custom field called 'Success' with dropdown data type with the values as mentioned above in the requirements. Click on Next.

Step 4: On 'Form Layout' tab drag all the fields to the left from under 'Available Fields'

Step 5: Click on 'Save'

Next Steps

Create a To-Do task type called 'Superhero follow-up' with the following requirements:

Task fields	Data type	Values
Success	Dropdown	** Yes No Not sure

Chapter 13: Forms and Process Designer

Forms

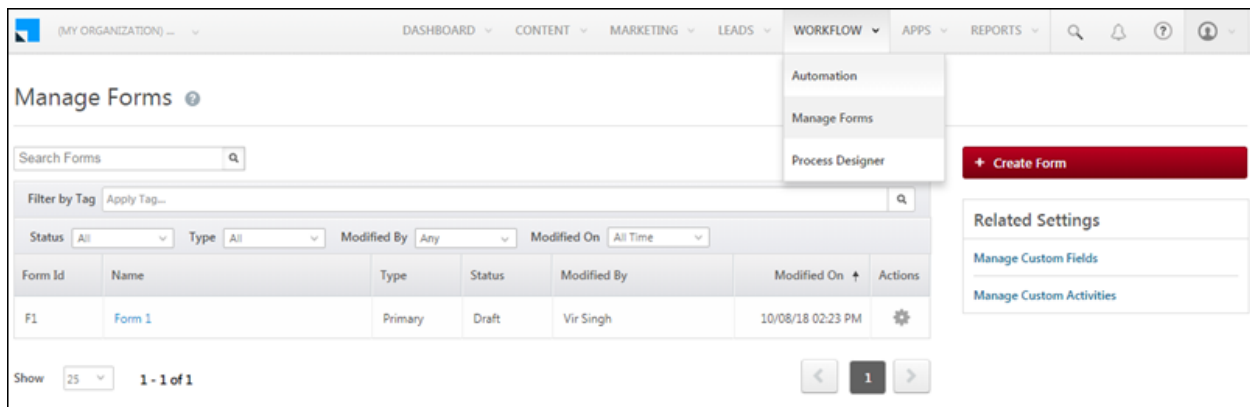
The Forms and Process Designer features help your users create intelligent forms to capture lead data that's relevant to their departments, products, or processes.

You can customize forms to behave in ways specific to your use cases, and prompt users to collect the right information based on a lead's previous inputs.

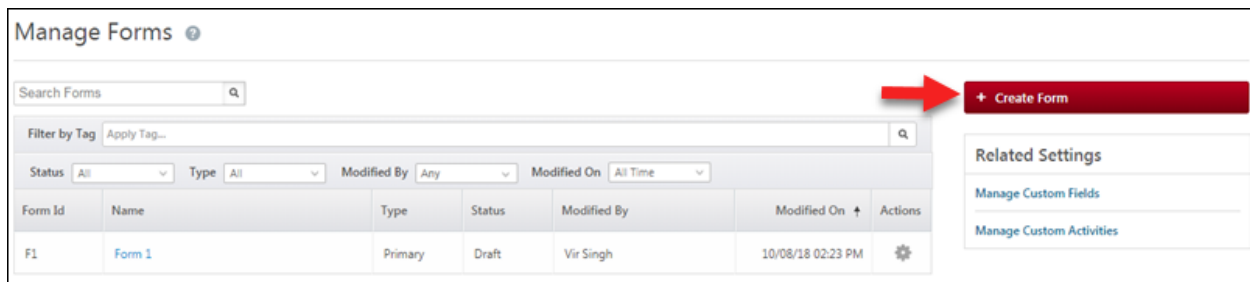
As per S.H.I.E.L.D Insurance Ltd., they would like to replace the existing activity forms of Document Collection with dynamic forms having both Lead Fields and Document Collection Activity fields. In the below steps, you will be creating the dynamic form as per the requirement of our client, S.H.I.E.L.D.

Step by Step: Creating Dynamic Forms

Step 1: Navigate to Manage forms from Workflow → Manage Forms



Step 2: Click on Create Form button to create a new form



Step 3: On the Create Form pop-up:

1. Give your form a name: Document Collection
2. Choose, Lead Fields and Activity Fields. Activity Type should be Document Collection
3. Click Next

Create Form

Configure your form properties

Give your form a name

Document Collection

Choose the type of fields to use

☒ Lead Fields

☒ Activity fields

☐ Task fields

Type Document Collection ▼

Create with default options [Next >](#)

Step 4: Choose the type of form as Primary Form and click Next.

- **Primary Form** – This is the main form that will appear on the Manage Forms grid. You can use the Process Designer to combine primary forms into processes.
- **Sub Form** – A sub-form can be integrated into a primary form. It will not show up on the Manage Forms grid.

Create Form

Configure your form properties

Choose the type of form

☒ **Primary Form**

Build a primary form to integrate in different processes

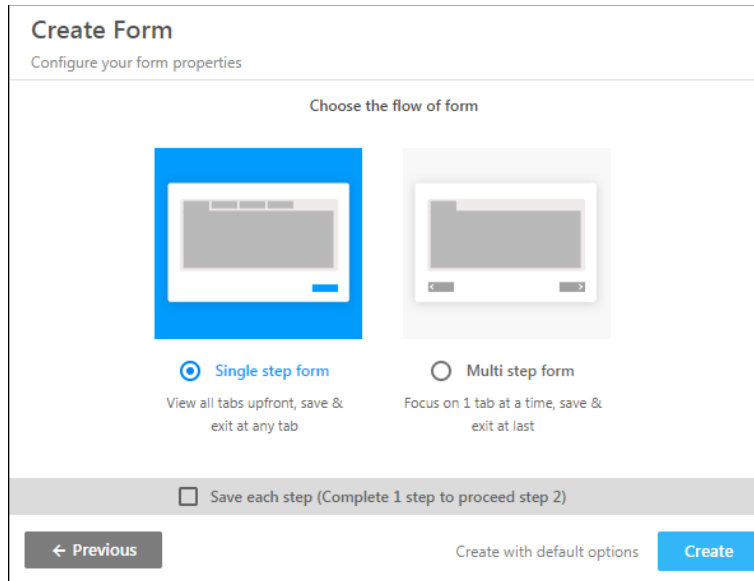
☐ **Sub-form**

Build a sub-form to integrate in primary form

← Previous Create with default options [Next →](#)

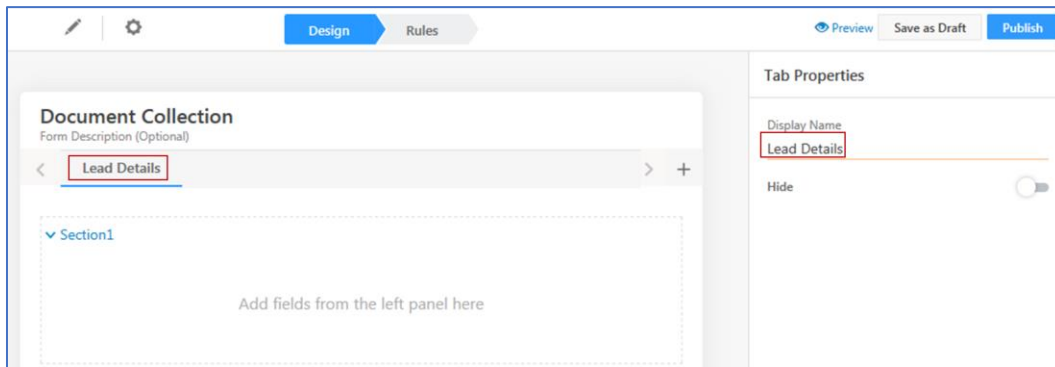
Step 5: Now choose form flow as Single step form and click on Create.

- **Single step form** – All tabs will be visible upfront. You can switch between tabs, and save & exit while on any tab.
- **Multi step form** – Users will only see one tab at a time. You can only save and exit the form at the last step.



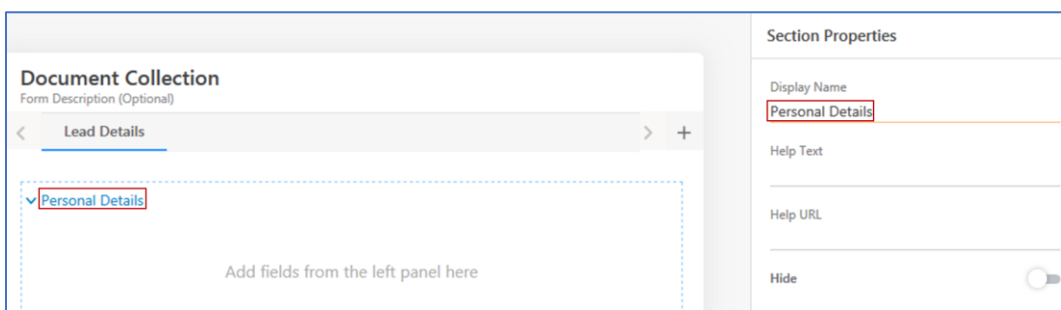
The 'Create Form' dialog box is titled 'Configure your form properties'. It asks to 'Choose the flow of form' with two options: 'Single step form' (selected with a radio button) and 'Multi step form'. Below each option is a brief description: 'View all tabs upfront, save & exit at any tab' for single step, and 'Focus on 1 tab at a time, save & exit at last' for multi step. There is a checkbox for 'Save each step (Complete 1 step to proceed step 2)' which is currently unchecked. At the bottom, there is a 'Previous' button, a 'Create with default options' link, and a 'Create' button.

Step 4: Click on the Tab 1 and rename it as Lead Details



The 'Form Designer' interface shows a 'Document Collection' form. The 'Design' tab is active. The form has a tab labeled 'Lead Details' which is highlighted with a red box. The form content area shows a section labeled 'Section1' with a dashed border and the text 'Add fields from the left panel here'. On the right, the 'Tab Properties' panel is open, showing the 'Display Name' field with the value 'Lead Details' highlighted by a red box. There is also a 'Hide' toggle switch.

Step 5: Click on Section 1 and rename it as Personal Details



The 'Form Designer' interface shows the same 'Document Collection' form. The 'Lead Details' tab is still selected. The 'Section1' is now labeled 'Personal Details' and is highlighted with a red box. The 'Section Properties' panel on the right is open, showing the 'Display Name' field with the value 'Personal Details' highlighted by a red box. There are also fields for 'Help Text', 'Help URL', and a 'Hide' toggle switch.

Step 6: Add following fields to Personal Details by clicking on + icon next to Lead Fields:

First Name, Last Name, Email ID, Mobile Number, Origin Country and Origin City

Document Collection
Form Description (Optional)

Lead Details

Personal Details

First Name
First Name

Last Name
Last Name

Email Id
Email Id

Mobile Number
Mobile Number

Origin Country
Origin Country

Origin City
Origin City

Step 7: Add another section to Lead Details tab by hovering over Personal Details section and click on + as displayed in the screenshot. Rename the Section as Occupational Details and add the following fields to it: Superhero Name, Superhero Powers and Arch Nemesis

Document Collection
Form Description (Optional)

Lead Details

Personal Details

First Name
First Name

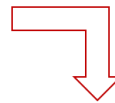
Last Name
Last Name

Email Id
Email Id

Mobile Number
Mobile Number

Add a section

+



Document Collection
Form Description (Optional)

Lead Details

Personal Details

Occupational Details

Superhero Name
Superhero Name

Superhero Powers
Superhero Powers

Arch Nemesis
Arch Nemesis

Step 8: Create new Tab by clicking on the + icon on the tabs bar and rename it as Insurance Documents

Document Collection
Form Description (Optional)

Lead Details

Add new tab

+

Step 9: Rename the section in Insurance Documents tab as Lead Documents and add following fields from Document Collection activity: Credit Report ID, Social Security Number, Passport ID and Document Uploads.

Step 10: Define the rules. As we have all the fields needed in the form, we will now be defining rules for the dynamic forms. As per S.H.I.E.L.D. Insurance firm, they would like to see the Passport Upload option only if the Passport ID field has the data. Likewise, Credit Report Upload and Social Security ID Upload options should show only when there is data in Credit Report ID field and Social Security Number field respectively.

To do so, Click on Rules tab on top, next to Design tab.

Step 11: Click on Add Rule button and define the following rules:

- **Rule 1:** If *Credit Report ID* contains data, Show Field *Credit Report Upload*
- **Rule 2:** If *Social Security Number* contains data, Show Field *Social Security ID Upload*
- **Rule 3:** If *Passport ID* contains data, Show Field *Passport Upload*

Step 12: Click on **Publish**. Once done, you will get a pop-up to Create Process. You can click on the same or you can navigate back to Manage Form page by clicking on Go back to list link.

Process Designer

The process designer lets you organize your forms into workflows. You can create workflows for any business process such as loan/insurance application, KYC collection, education applications, medical applications, etc.

After you've created one or more forms, use the process designer to:

1. Choose the work area (Manage Forms page, Manage Activities page, Smart Views, etc.) where you want to display your forms.
2. Set conditions on users (show forms to particular teams, roles, sales groups, etc.) and form field values.
3. Chain together multiple forms to create processes.

Step by Step: How to create a Process?

Step 1: To access the Manage Processes page, navigate to Workflow → Process Designer or you can click on Create Process link after publishing the Forms.

The screenshot shows the 'Manage Processes' page. At the top, there's a navigation bar with tabs: DASHBOARD, CONTENT, MARKETING, LEADS, WORKFLOW, APPS, and REPORTS. The 'WORKFLOW' tab is active, and a dropdown menu is open showing 'Automation', 'Manage Forms', and 'Process Designer'. Below the navigation bar, there's a search bar labeled 'Search Processes'. Below the search bar, there are filters for Status (Any), Trigger (All), Application (Any), Modified By (Any), and Modified On (All Time). The main table lists four processes:

Name	Trigger Type	Status	Modified On	Modified By	Actions
Process 4	At Specific Work Area	Published	12/18/18	Vir Singh	[Gear Icon]
Process 3	At Specific Work Area	Draft	12/17/18	Vir Singh	[Gear Icon]
Process 2	At Specific Work Area	Unpublished	12/17/18	Vir Singh	[Gear Icon]
Process 1	At Specific Work Area	Draft	12/17/18	Vir Singh	[Gear Icon]

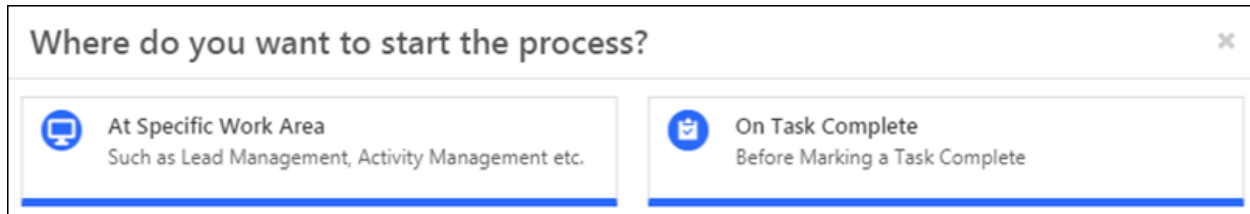
At the bottom left, there's a 'Show' dropdown set to 25 and a pagination link '1 - 4 of 4'. At the bottom right, there's a '+ Create Process' button. On the right sidebar, there's a 'Related Settings' section with links to 'Manage Forms', 'Manage Custom Fields', and 'Manage Custom Activities'.

Step 2: Click the Create Process button to create a new process.

This screenshot is identical to the previous one, but with a red arrow pointing to the '+ Create Process' button in the bottom right corner of the main content area.

Step 3: Choose the trigger point:

- **At Specific Work Area**
This option lets you create a button on a specific page (Manage Leads, Lead Details, etc.) to trigger the process.
- **On Task Complete**
The process will be triggered before a user marks a task complete.





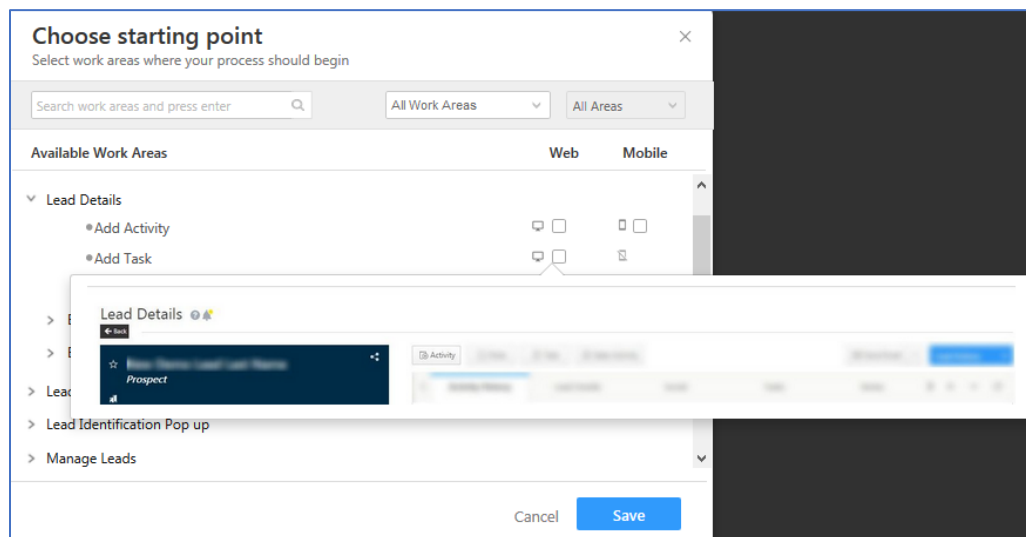
The dialog box titled "Where do you want to start the process?" has a close button (X) in the top right corner. It contains two selectable options, each with a blue icon and a blue underline:

- At Specific Work Area**
Such as Lead Management, Activity Management etc.
- On Task Complete**
Before Marking a Task Complete

In our case, it will be **At Specific Work Area**

Step 4: At Specific Work Area trigger you can choose the page or area you want the process to be initiated from. You can choose multiple work areas to begin a process from.

- Under the Available Work Areas section, click on a work area, then click the checkboxes alongside Web or Mobile.
Be sure to hover your cursor over the desktop  and mobile  icons to view a screenshot of the work area where you're placing the starting point of the process.
- Select all the work areas you want, then click Save.



The dialog box titled "Choose starting point" has a close button (X) in the top right corner. Below the title is the instruction "Select work areas where your process should begin".

At the top, there is a search bar with the placeholder "Search work areas and press enter" and a magnifying glass icon. To the right of the search bar are two dropdown menus: "All Work Areas" and "All Areas".

Below the search bar is a section titled "Available Work Areas" with two tabs: "Web" and "Mobile". Under the "Web" tab, there is a list of work areas:

- Lead Details (expanded)
 - *Add Activity (with Web and Mobile checkboxes)
 - *Add Task (with Web and Mobile checkboxes)

A preview window is shown for the "Lead Details" work area, displaying a "Prospect" card and a table with columns for "Activity", "Status", "Created", and "Updated".

At the bottom of the dialog box are "Cancel" and "Save" buttons.

For our business use case, select following work areas:

Under Lead Details

Add Activity	Both Web and Mobile
Edit Activity History → Document Collection	Web Only

Under Lead Grid

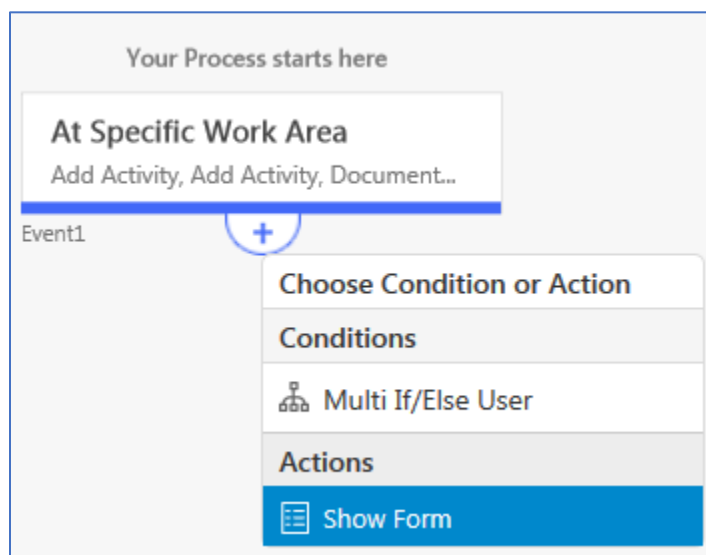
Add Activity	Both Web and Mobile
--------------	---------------------

Under Manage Leads

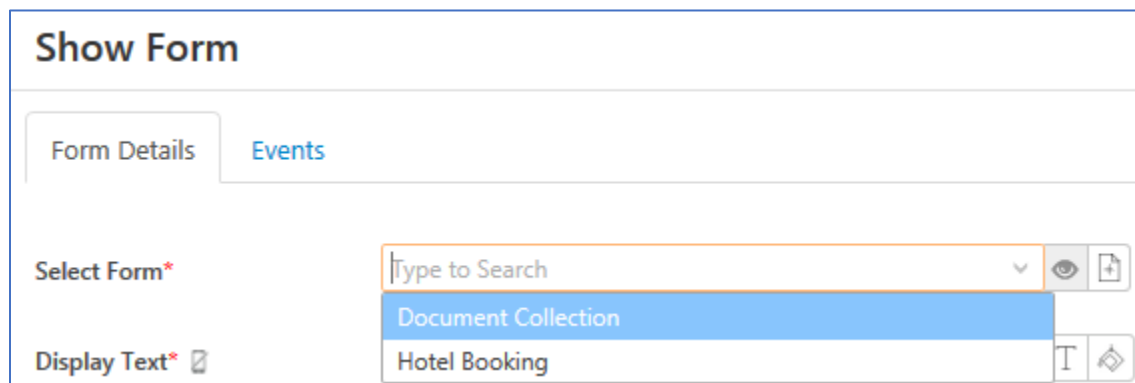
Add New Lead	Both Web and Mobile
--------------	---------------------

Step 5: Click on Save

Step 6: Click on + icon under At Specific Work Area card and select Show Form



Step 7: On the Show Form pop-up, select the published form for Select Form field from the drop down.



Step 8: Replace the Display Text of the form with Insurance Document Upload and Display Text for Save button with Upload. Also, keep Save and Add New Button as disabled

The screenshot shows the 'Show Form' configuration window with the 'Events' tab selected. The 'Form Details' sub-tab is active. The 'Select Form*' dropdown is set to 'Document Collection'. The 'Display Text*' field is set to 'Insurance Document Upload'. The 'Action Buttons' section shows the 'Save Button' toggle is turned on. The 'Display Text*' field for the Save Button is set to 'Upload'. The 'Preview' button for the Save Button is labeled 'Upload'. The 'Save and Add New Button' toggle is turned off. The 'Display Text*' field for the Save and Add New Button is set to 'Save and Add New'. The 'Preview' button for the Save and Add New Button is labeled 'Save and Add New'.

The Events tab lets you call Lapps or an external API before a form is submitted. You can use this as a final validation for a form submission. Read the notes carefully.

The API or Lapp should return 200 OK as the response code and content like `{"IsSuccess":true}` or `{"IsSuccess":false,"ErrorMessage":"Your personal details and passport details do not match. Please check"}`

The screenshot shows the 'Show Form' configuration window with the 'Events' tab selected. The 'Form Details' sub-tab is active. The 'Pre Submission' section is expanded. The 'Type' dropdown is set to 'API'. The 'API URL' field is empty. The 'Content Type' is set to 'application/json'. The 'Custom Headers' section is empty. The 'Notes' section contains the following text:

- Details of Form Id, ProcessDesigner Id, User Id, Lead Id, Activity Id will be posted in query string parameters and Form details in Post data
- Response other than 2XX considered as failed and hence form will not be submitted. Lapp must send "IsSuccess" response parameter to know its result
- If there exist error - Error message must be send in response parameter "ErrorMessage"

The 'Cancel' and 'Save' buttons are at the bottom right.

We can leave the Events section for our process blank since, we are not validating any fields neither have a Lapp created for the same.

Step 9: Click on Save.

Step 10: Click on Publish and then on Yes to confirm.

Step 11: Logout and login to your LeadSquared account.

Step 12: Navigate to Manage Leads page. Notice Add New Lead button is now replaced with Insurance Document Upload form.

The screenshot shows the 'Manage Leads' interface. At the top, there's a search bar and filters for Account, Lead Stage, and Lead Source. Below this is a table of leads with columns: Lead Name, Lead Score, Lead Stage, Owner, Lead Source, Lead Quality, Engagement Score, and Actions. The table contains two rows: 'Captain America' (Lead Score: 55, Lead Stage: Onboarded Superheroes, Owner: Bryan Joseph, Lead Source: Social Media, Lead Quality: 0, Engagement Score: 0) and 'The Vision' (Lead Score: 110, Lead Stage: Onboarded Superheroes, Owner: System, Lead Source: Organic Search, Lead Quality: 7/10, Engagement Score: 0). To the right of the table is a sidebar with buttons: 'Quick Add Lead', 'Insurance Document Upload' (highlighted with a red box), 'Add New Lead', 'Import Leads', and 'Import Lead Tags'.

Step 13: Hover over gear icon next to any lead and observe Add Activity has been replaced with Insurance Document Upload

This screenshot is similar to the previous one, but with a dropdown menu open for the 'Captain America' lead. The dropdown menu contains options: 'Edit', 'Edit+', 'New Sales Activity', 'Add Task', 'Insurance Document Upload' (highlighted with a red box), and 'Send Email'.

Step 14: Open any Lead to access Lead Details page and observe new tab next to Sales Activity button as Insurance Document Upload

The screenshot shows the 'Lead Details' page for 'Captain America'. At the top, there's a 'Back' button and a notification: 'Captain opted out from email communication.' Below this are tabs: 'Activity', 'Note', 'Task', 'Sales Activity', 'Insurance Document Upload' (highlighted with a red box), 'Send Email', and 'Lead Actions'.

Similarly, if you post Insurance Document Upload activity, it will be displayed in the Activity history tab. If you click on pencil icon to edit the posted Insurance Document Upload Activity, it will display the Dynamic Form you just created.

Chapter 14: Email Campaigning

Email Campaigning

An **email campaign** is a coordinated set of individual **email** messages that are deployed across a specific period with one specific purpose, such as download a white paper, sign up for a webinar, or make a purchase with a provided coupon.

Create an 'Welcome Aboard' email campaign to welcome all the leads just entering the system.

Upload the images shared with you – Captain Life and Shield logo

Content:

WELCOME ABOARD HEROES!

THE UNIVERSE NEEDS PROTECTION, SO DO YOU!

WE PROVIDE THE MOST RELIABLE SIDEKICK YOU EVER NEED!

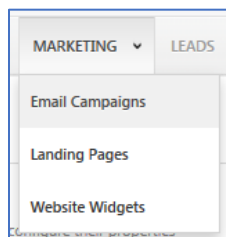
THANK YOU FOR CHOOSING S.H.I.E.L.D AS WE TOGETHER GO FOR GLORY!

WELCOME TO THE COOLEST FAMILY IN THE UNIVERSE

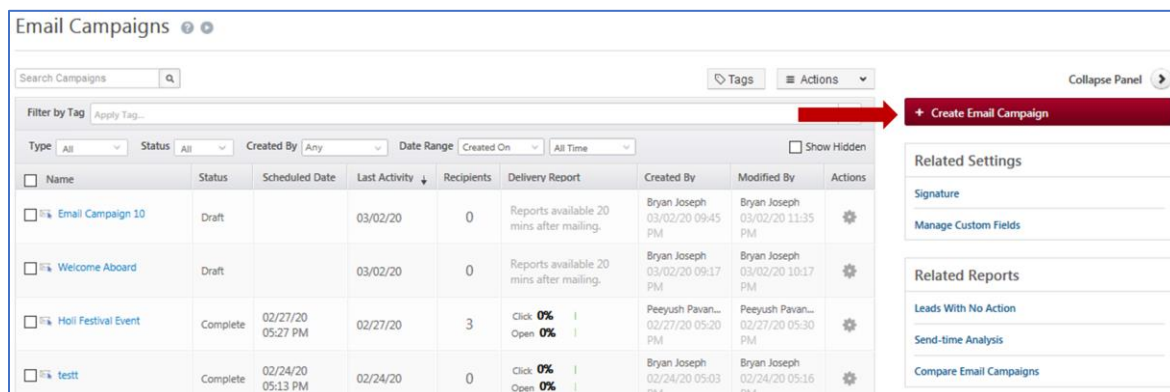
CONTACT US AT 100010001000, OR MAIL US AT SHIELDYOU@marvel.com

Step by Step: Creating Email Campaign

Step 1: Hover on 'Marketing' in the topbar and select 'Email Campaigns' from the dropdown.

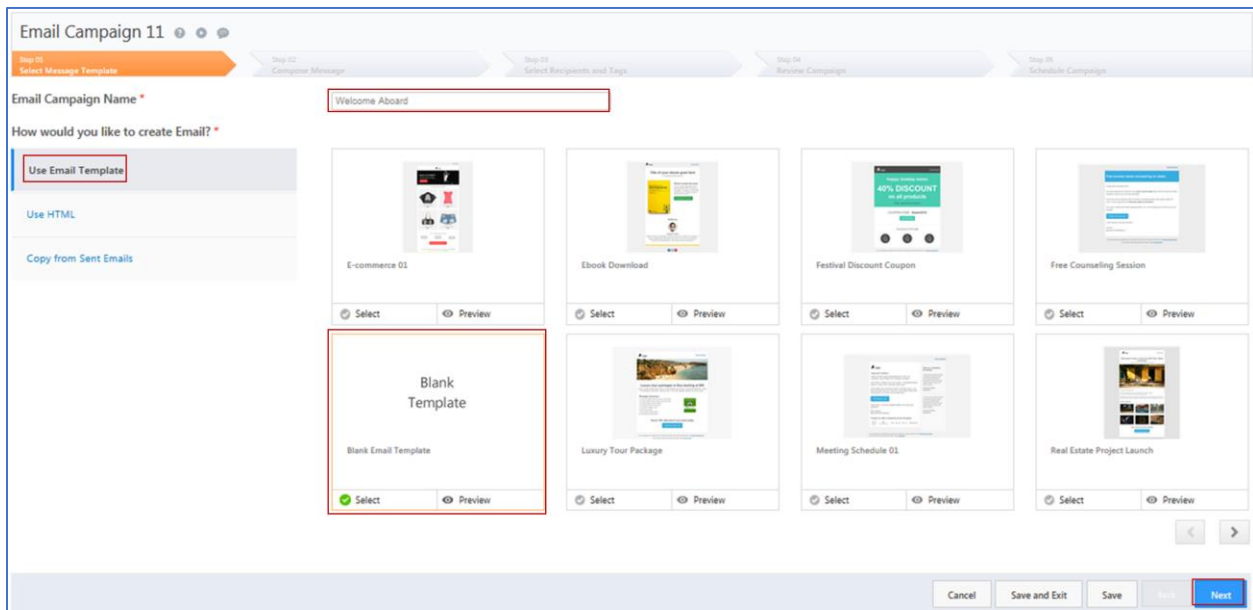


Step 2: Click on 'Create Email Campaign' to get started.



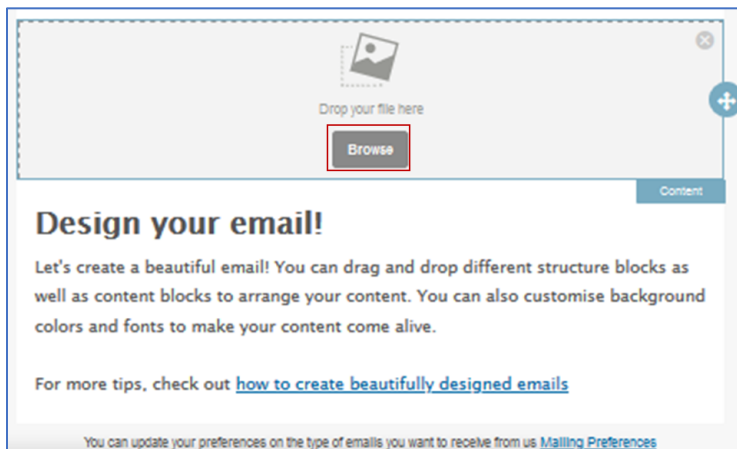
Step 3: Give “Welcome Aboard” as the Email Campaign Name.

Step 4: Select ‘Use Email Template’ tab and choose the **Blank Template** from the options. Click on Next



Step 5: Type the subject ‘Welcome Aboard’ and start with the customization. As a prerequisite you will need to upload the images shared with you at the beginning to the LeadSquared system.

Step 6: Upload the image of ‘SHIELD Logo’ by clicking on ‘Browse’. Select the image and adjust the width.



Step 7: Add the text required by double clicking on the content box and add content given below.

Note : You can edit the background color, font color.

WELCOME ABOARD HEROES!

THE UNIVERSE NEEDS PROTECTION, SO DO YOU!



Step 8: Add the image 'Captain Life'. Under the 'Content' tab drag and drop the 'image' icon, and select the required image



Step 9: Add a text block by dragging and dropping the 'Text' icon under the Content tab. Add the following content by double clicking on the text area.

WE PROVIDE THE MOST RELIABLE SIDEKICK YOU EVER NEED!

THANK YOU FOR CHOOSING S.H.I.E.L.D AS WE TOGETHER GO FOR GLORY!

WELCOME TO THE COOLEST FAMILY IN THE UNIVERSE.

CONTACT US AT 100010001000, OR MAIL US AT SHIELDYOU@marvel.com



Step 10: Click on 'Test Content' button and enter your email id to see how the content of your campaign looks like, then click on 'next'

Test your email content

Send test email to following email addresses for review

thebitterbatter@gmail.com

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

Cancel
Send

Step 11: Under Recipient Lists dropdown select the list 'Fresh Leads'

Welcome Aboard

Step 01 Select Message Template
Step 02 Compose Message
Step 03 Select Recipients and Tags
Step 04 Review Campaign
Step 05 Schedule Campaign

Recipient Lists

Fresh Leads
Fresh Leads

+ Add
or
Create Recipient List

Step 12: Click on 'Next'

Step 13: Review the campaign and click on 'Next'

Step 14: Select the option to send the email content right away, and click 'Send Now'

Welcome Aboard

Step 01
Select Message Template

Step 02
Compose Message

Step 03
Select Recipients and Tags

Step 04
Review Campaign

Step 05
Schedule Campaign

☒ Send Email Campaign

Send the email campaign immediately.

☐ Schedule Email Campaign

Choose the date and time to send the email campaign.

Cancel

Save and Exit

Back

Send Now

Next Steps

Create an email campaign called “Reminder” for the leads in the list ‘Leads with lead score less than 100’ and schedule it to be sent on the coming Sunday early morning at 9.

The content of the email campaign could be to remind them of upcoming webinar session. You can write your own content or copy from any generic template from Google.

Chapter 15: Landing Pages

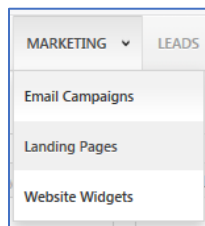
Landing Pages

A landing page, sometimes known as a "lead capture page", "static page", or a "destination page", is a single web page that appears in response to clicking on a search engine optimized search result, marketing promotion, marketing email, or an online advertisement.

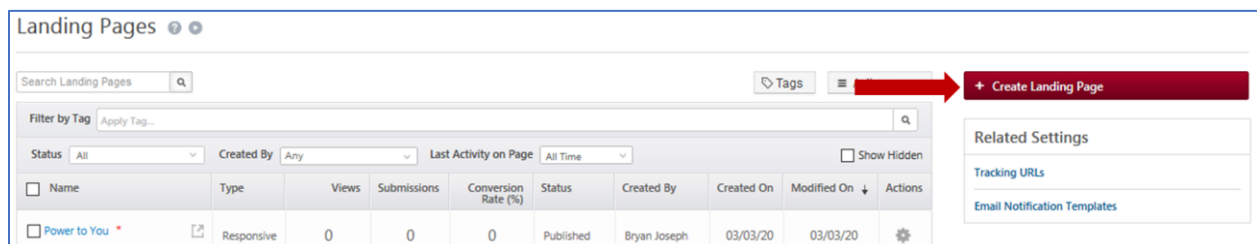
Step by Step: Creating a landing page

We will be creating a landing page called 'Superhero Capture' to capture the Superhero Name, Email, Phone Number and add a captcha field as well

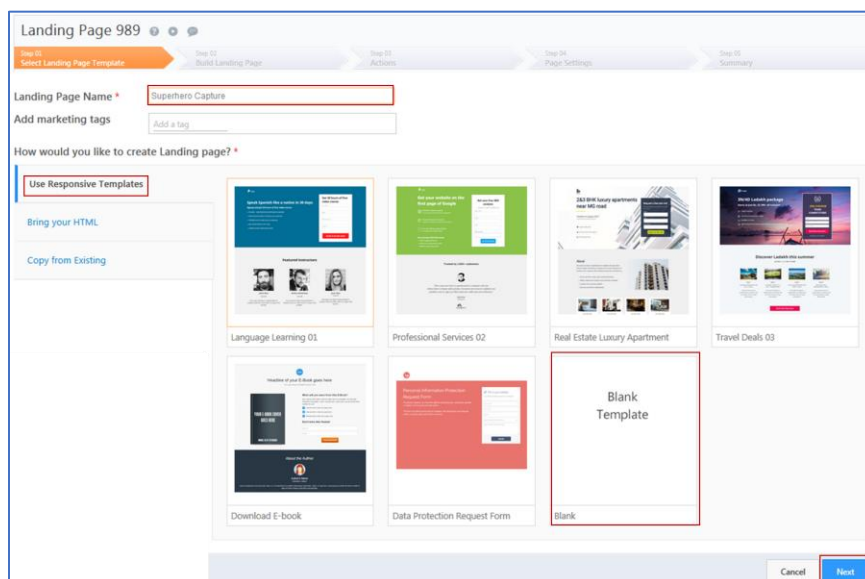
Step 1: From the top bar hover around marketing and from the dropdown select 'Landing Pages'.



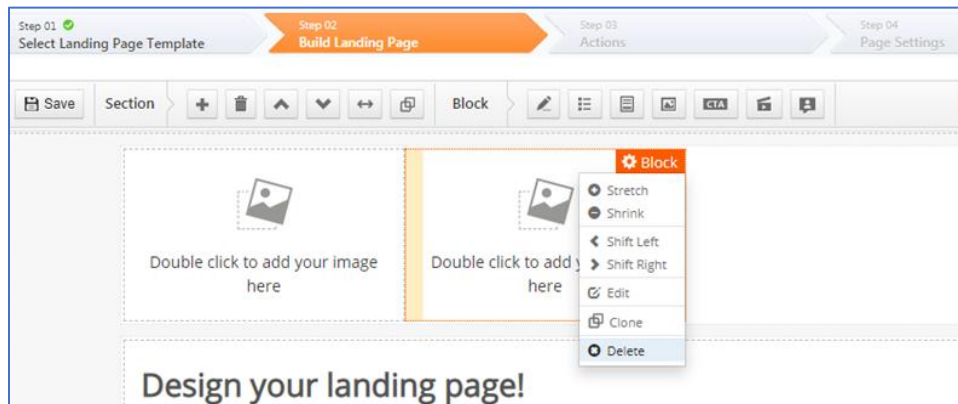
Step 2: Click on 'Create Landing Page' button



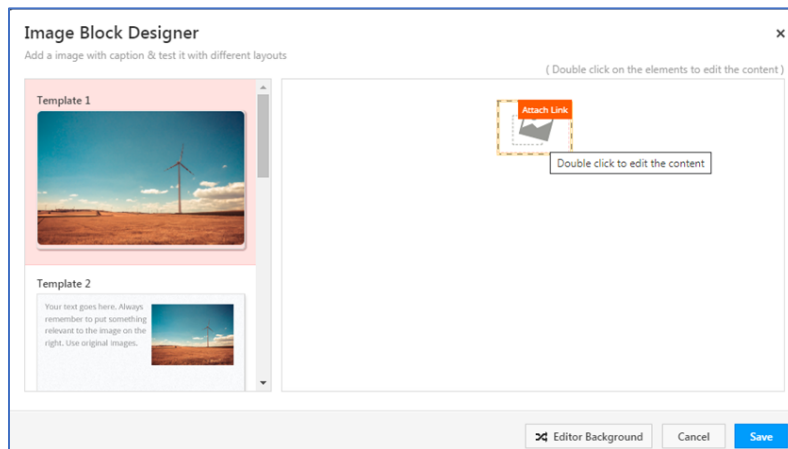
Step 3: Landing Page name should be 'Superhero Capture'. From the available templates select the 'Blank Template'. Click on 'Next'



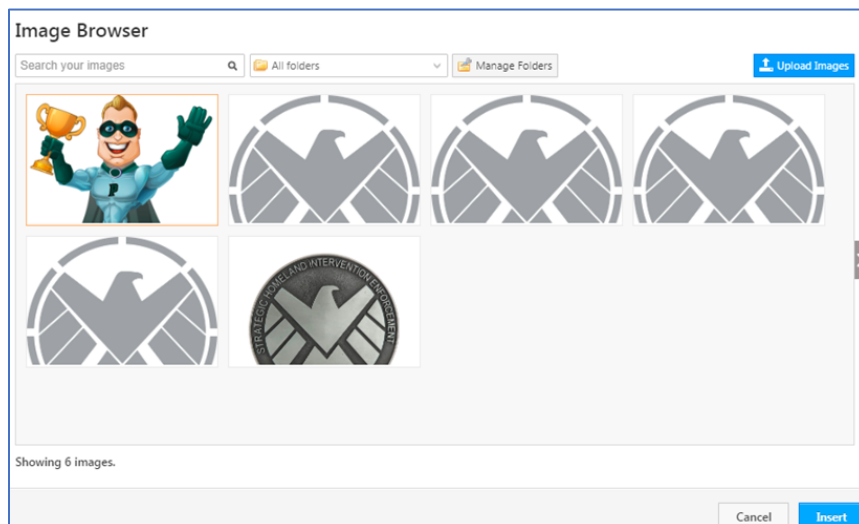
Step 4: Delete two of the three image blocks by clicking on the block and hovering around 'block' and from the dropdown click on 'Delete'.



Step 5: Double click on the remaining image block, select 'Template 1'. On the right side, double click on the image to upload the content.



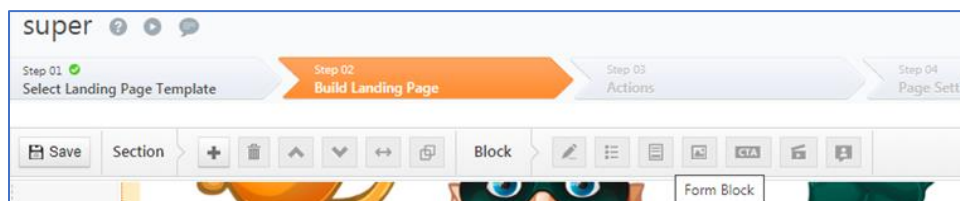
Step 6: Upload the image shared with you called 'Incredible'. Select it and click on 'Insert'. Click on 'Save'



Step 7: Click on the image and to the right adjust the width to '1'



Step 8: From the customization top bar select 'Form Block'



Step 9: Hover over the Form section you added, click on 'Block' and select 'Edit Header'. Insert the following text: "GET A QUOTE NOW". Click 'Save'.

Step 10: Hover on 'Block' of the form block again, this time click on 'Edit Form'. Drag the following lead fields

- Superhero Name
- Email
- Phone Number
- Captcha (in special fields)

And rename the Change Button Text to "GET YOUR QUOTE NOW" and click on 'Save'

Form Designer

01 Add Lead Fields

Search Field

Special Fields

Mailing Preferences

Password

File Upload

Selected Fields

Email Id

Phone Number

Superhero Name

Captcha

Available Fields

Account

Is Primary Contact

Add Custom Field

02 Design Your Form

Superhero Name

Email *

Phone Number

VP 3 F 2

GET YOUR QUOTE NOW

Label Properties

Placement: Top

Font: Open Sans

Font Size: [Slider]

Font Weight: Normal

Color: #787676

Field Properties

Cancel Save

Step 11: On the top bar select 'Feature Block'. Of the feature block, double click on 'Feature' and in the edit content section

- Add the S.H.I.E.L.D logo
- Add the feature headline as "APPLY NOW TO SAVE UPTO 70% OFF ON LIFE INSURANCE"
- Add the description as "PROTECT YOUR LOVED ONES WHO DEPEND ON YOU FILL THIS FORM SO THAT S.H.I.E.L.D CAN REACH YOU AT THE EARLIEST WITH THE BEST QUOTE"

Feature Block Designer

Add a new feature & test it with different layouts

Template 1

Feature Headline

Explain your feature here. Make sure you talk about customers not yourself. Keep it short and simple.

Template 2

Feature Headline

Explain your feature here. Make sure you talk about customers not yourself. Keep it short and simple.

LOGISTICS DIVISION

APPLY NOW TO SAVE UPTO 70% OFF ON LIFE INSURANCE.

PROTECT YOUR LOVED ONES WHO DEPEND ON YOU

FILL THIS FORM SO THAT S.H.I.E.L.D CAN REACH YOU AT THE EARLIEST WITH THE BEST QUOTE

Editor Background Cancel Save

Step 12: Click on 'Save' and delete the description box

Step 13: Click on 'Next'

Step 14: Select 'Gets a Thank You message'. Under 'Other Actions'

- Check the box for 'Ignore submission from New Lead'
- Assign the leads to Peter Parker
- Increase the lead score by 10

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

☒ Gets a Thank You message or ☐ Is redirected to a URL or ☐ Downloads a document

Where should the Thank You message be shown?
☒ Message above the form ☐ On a Popup
Message will be shown above the form after form submission.

Thank you for your interest.

272 characters remaining

Message will be shown above the form after form submission in case of error

Oops something went wrong.

274 characters remaining

☐ Auto Response Email to Lead
☐ Send Notification to the Marketer

Other Actions

Create new Lead for each Submission ☐
Ignore submission from New Lead ☒
Assign Leads to
Add Leads to List
Increase Lead score by

Step 15: Click on 'Next'

Step 16: Do not change any settings. Click on 'Next'

Step 15: Check the summary and click on 'Publish'

NEXT STEPS:

Create a landing page 'Power To You' to capture lead information to book a sales demos on the S.H.I.E.L.D website with their Email ID". Capture the following information of the lead

- Superhero name
- ZIP
- Email ID
- Password (special fields)

And a "THANK YOU" should pop up after submission of the landing page.

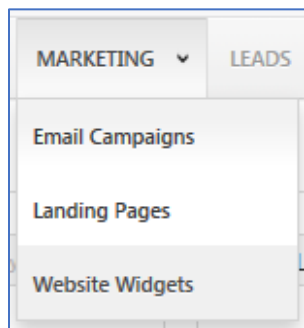
Chapter 16: Website Widgets

LeadSquared Top Bar Widget is a lead conversion tool that you can put on your website and landing pages to get distinguished attention of web visitors on your marketing offers. The TopBar widget is simple to design and connect with your website. You can design it in your LeadSquared account, specify which pages to display on and publish. It does not require any change to be done on your website.

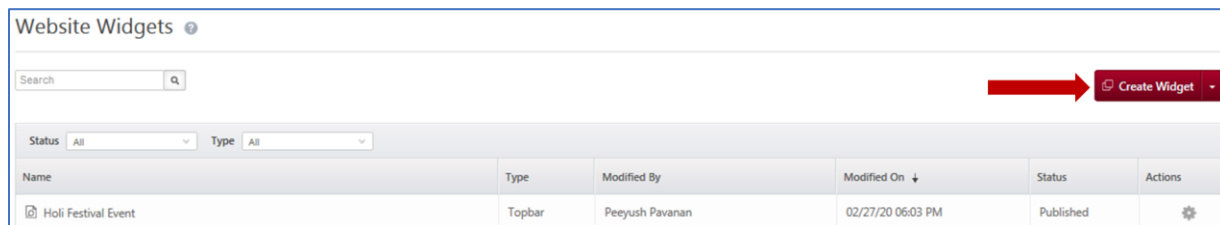
Let's create a website widget on the landing page 'Superhero Capture' to direct the leads to the landing page 'Power to You' and informing them to register for the sales demo.

Step by Step: Creating Website Widget

Step 1: Hover on 'Marketing' in the topbar and in the drop down select 'Website Widgets'



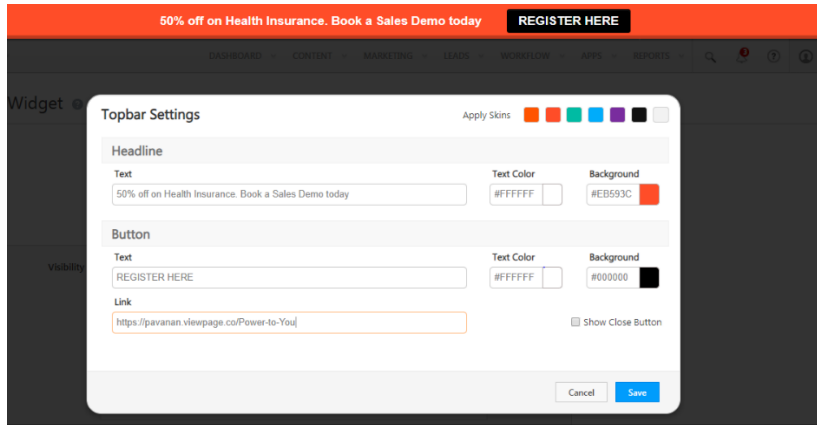
Step 2: Click on 'Create Website Widget'



Step 3: Enter the name 'Sales Demo'

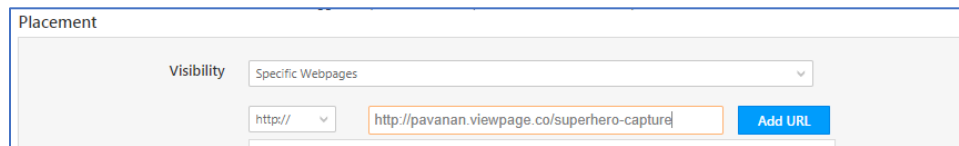
Step 4: Under Design, click on edit and enter the following

- Headline Text: 50% off on Health Insurance. Book a Sales Demo today
- Button Text: REGISTER HERE
- NOTE: Enter the link of 'Power to You' Landing Page created in the previous exercise in the Link space.



Step 5: Click on 'Save'

Step 6: Under Visibility, select 'Specific Webpages' and enter the link of the Landing Page 'Superhero Capture'



Step 7: Under Duration select the current date and time, tick the box 'No End Date'

Step 8: Click on 'Save and Publish'

Chapter 17: Automation

The Automation feature lets you automate your entire workflow using an intuitive and easy to use visual designer. It's a powerful way to push your leads to conversion! Just set it up once and watch your leads trickle down the sales funnel with minimal manual effort.

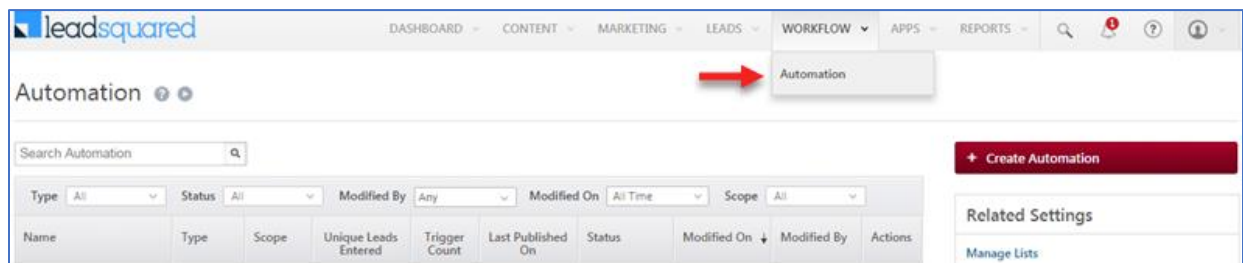
Here are some examples of what you can achieve through automation –

- Send automated campaigns to leads and follow up based on their behavior.
- Nurture leads with the right messages depending on their engagement.
- Automatically distribute leads to users/groups based on location, interests, products, etc.
- Automatically check-in/check-out your users, create tasks and alerts based on their availability and send them automated messages on special occasions.
- Use Lapps and webhooks to pull/push data and automate processes you perform in third-party applications.
- And lots more...

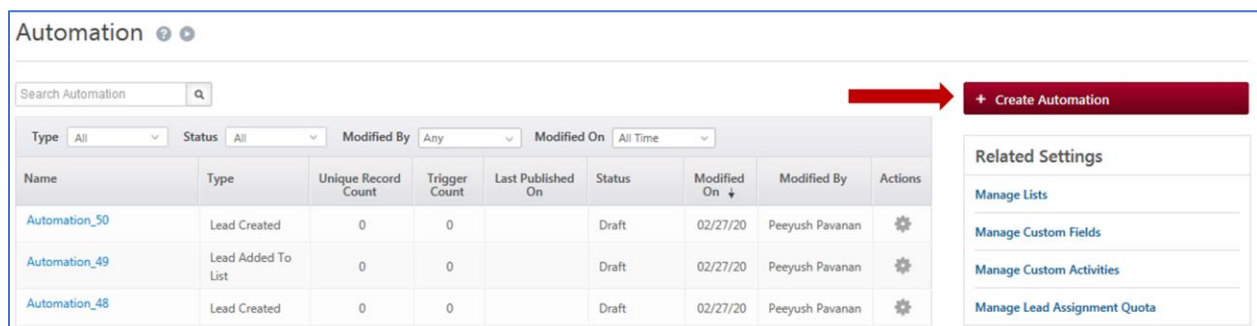
Step by Step: Creating Automation

As per S.H.I.E.L.D. Insurance Ltd., we will be creating an automation to send automated emails to leads with Webinar details and registration link as and when the leads are created in LeadSquared. If the lead does not open the email for 1 day, a reminder email must be sent out with different subject line. The leads who opened the email will be distributed to Non Priority and Priority Sales Users based on Lead Scores. Also, notifications must be sent to the Sales Users to whom the leads are assigned. A follow up tasks will be created after the notifications are sent out

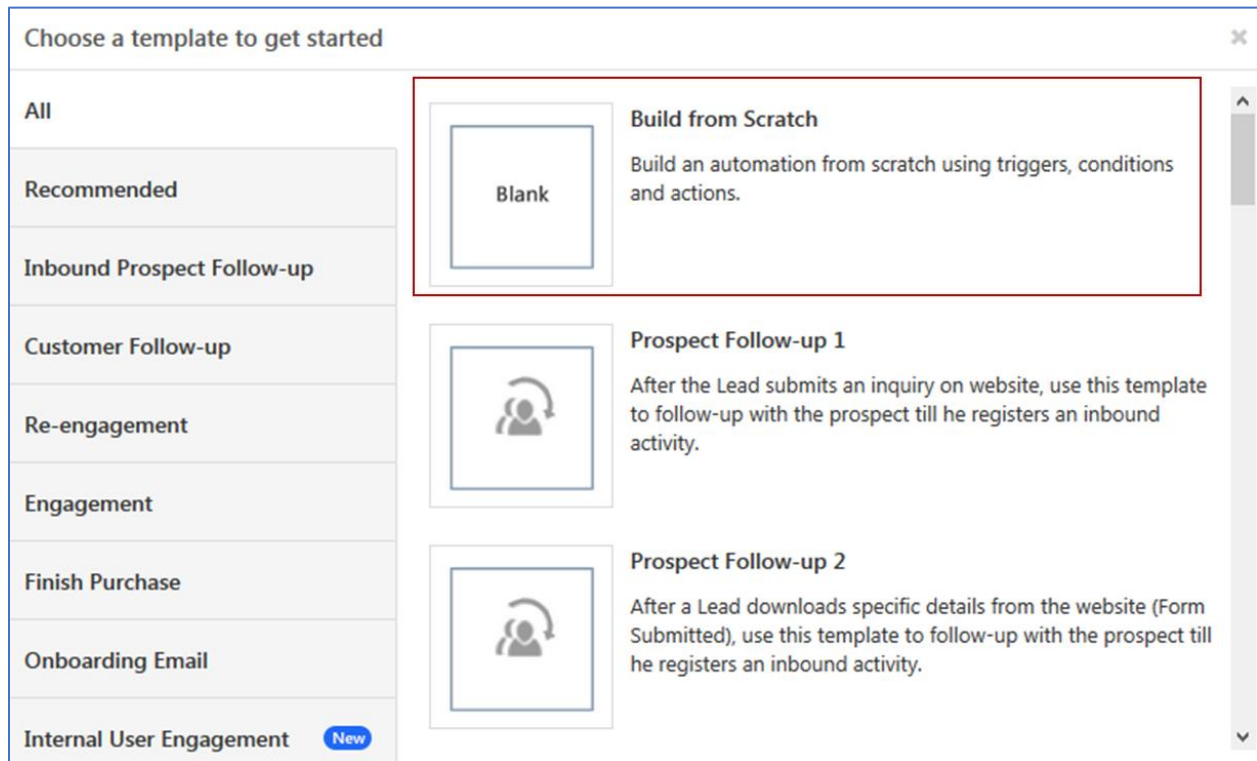
Step 1: To access automation, navigate to Workflow → Automation



Step 2: Click on Create Automation



Step 3: On the next screen, you can choose pre-defined automation template and customize or build from scratch. For our case, we will select Build from Scratch template



Step 4: For our purpose we will be selecting New Lead as the trigger point for executing the automation. Apart from New Lead trigger, we have following trigger points

Category	Trigger	Explanation
Lead Triggers	New Lead Added	Triggers the automation when a new lead is created in your LeadSquared account.
	Lead Update	Triggers the automation when a lead field is updated.
	Lead Added to List	Triggers when a lead is added to a list.
	On a Specific Date	Triggers on a chosen date.
Activity Triggers	New Activity on a Lead	Triggers when a lead performs an activity or set of activities.
	Activity Update on Lead	Triggers when an activity posted on a lead gets updated. This trigger only includes custom and sales activities.
Task Triggers	Task Create	Triggers when a task is created.
	Task Reminder	Triggers when a task reminder is created.
	Task Complete	Triggers on the completion of a task.
User Triggers	On a Specific Date	Use this trigger to initiate your automation on a specific date.
	Start of a Workday	You can trigger an automation at the start of each workday.
	End of a Workday	You can trigger an automation at the end of each workday.

When will your Automation start?

Lead Trigger	New Lead When a new Lead is created or added
Activity Trigger	
User Trigger	Lead Update When a Lead field is updated or changed
Task Trigger	
At Regular Intervals	Lead Added To List When a Lead is added to a static list
	On a Specific Date Such as birthday, renewal date etc.

Step 5: Select Trigger on Import to trigger the automation when importing the leads into LeadSquared and click on Save.

Automation starts when a Lead is created

Additional Conditions [+Add Conditions](#)

Trigger on Import ☒

[Choose condition\(s\) to remove Lead\(s\) from this automation](#)

Cancel Save

Step 6: Click on + icon below the trigger card and add wait condition for 10 minutes.

Your Automation starts here

New Lead

Triggers when Lead is created

Event1

Choose Condition or Action

Conditions

- Multi If/Else
- If/Else
- Compare
- Wait**

Actions

Set Wait Condition

Lead waits

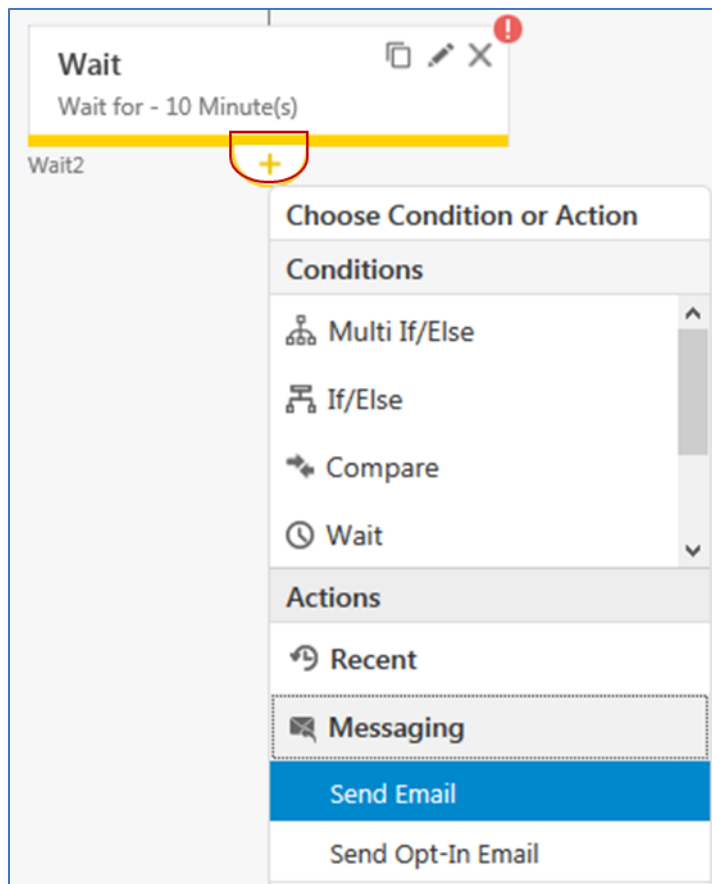
☒ For 10 Minute(s) ☐ Use mail merge

☐ Till a specific date & time

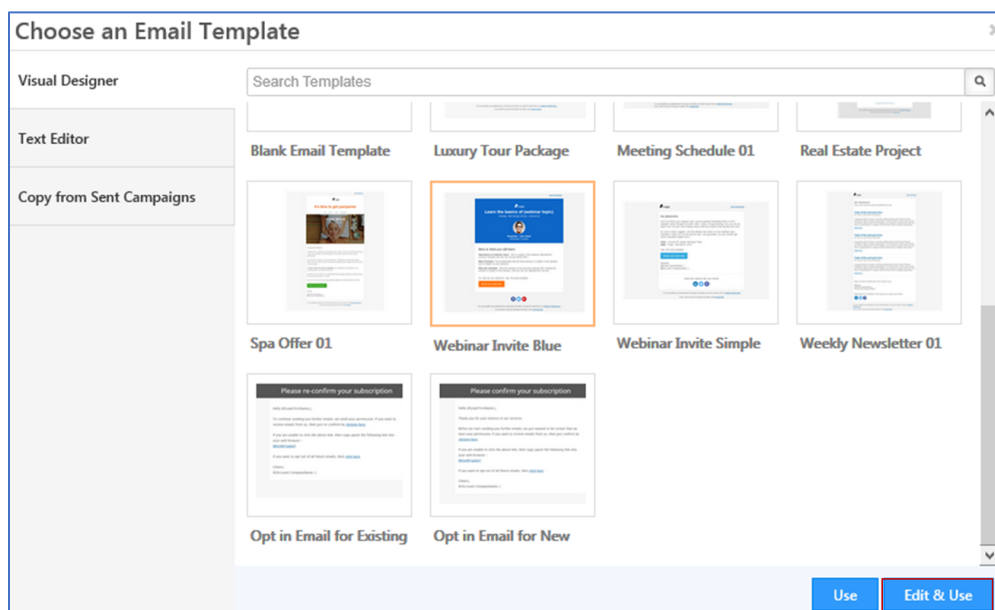
Minute(s)
Hour(s)
Day(s)
Week(s)
Month(s)
Year(s)

Cancel Save

Step 7: Click on + icon below Wait card and select Send Email under Messaging section.

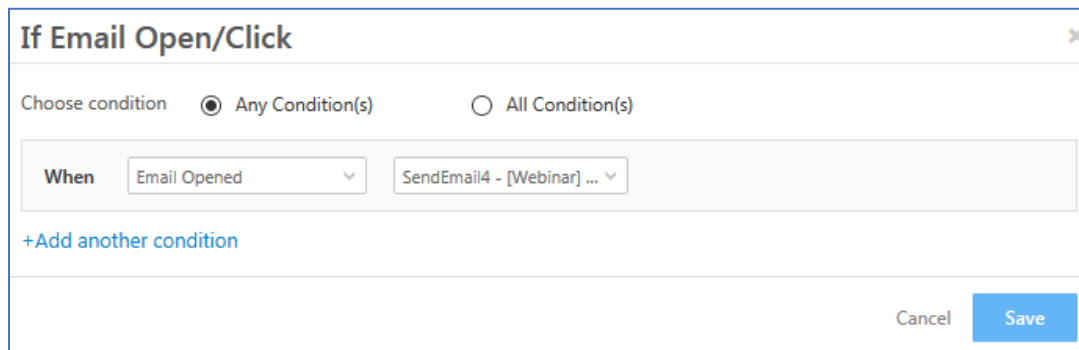
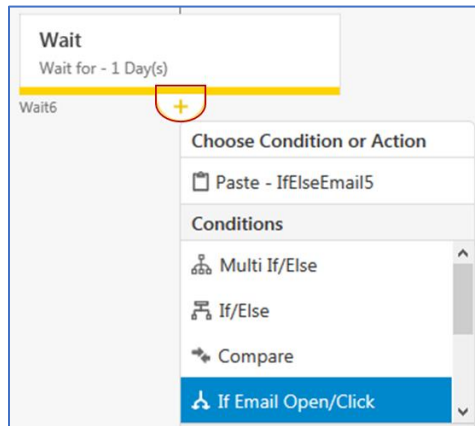


Step 8: Select Webinar Invite Blue. Edit the content with “Register for upcoming Webinar by S.H.I.E.L.D. Insurance firm” inviting leads to register for the webinar with a link to your “Power To You” landing page in it. Give an apt subject line with it.

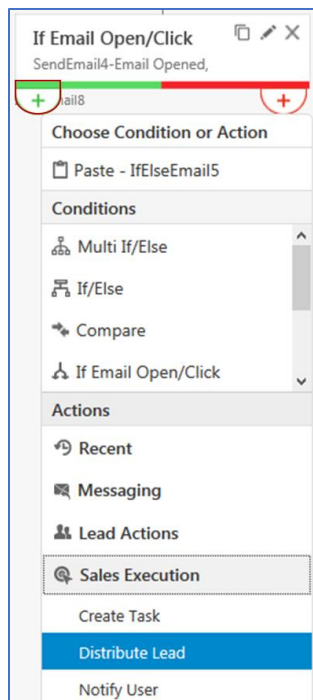


Step 9: Click on + icon under Send Email card and put Wait condition for 1 day

Step 10: Click on + icon under the Wait Condition and select If Email Open/Click under Conditions and set the condition as Email Opened and click on save (screenshot below).

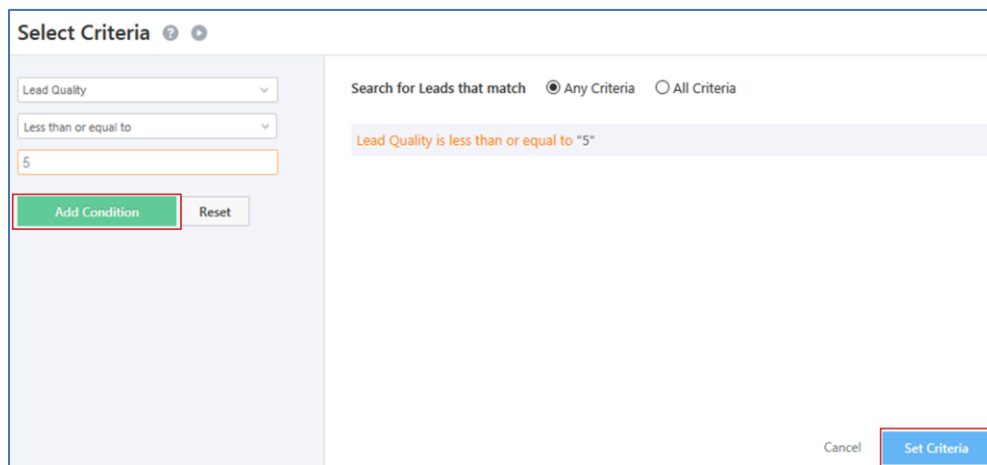
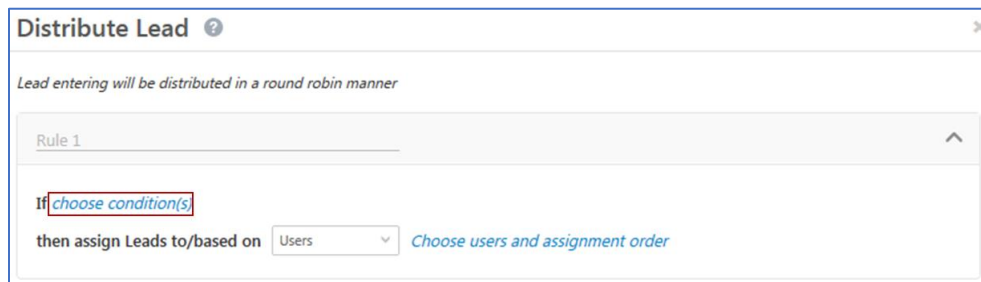


Step 11: Click on **green +** icon (If condition being true) and select Distribute Lead under Sales Execution

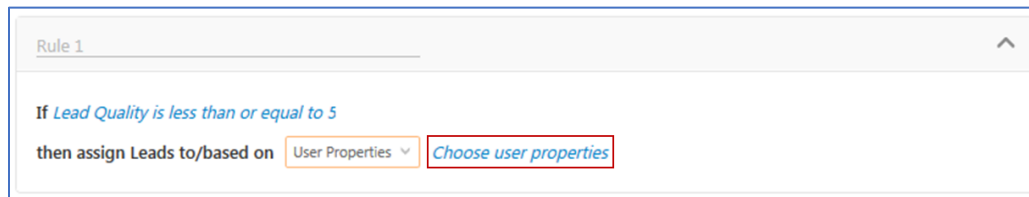


Step 12: Define the rules for distributing leads

Rule 1: Click on choose condition(s) link and set the condition as Lead Quality is less than or equal to 5. Set the Criteria after adding the condition (screenshot, below)



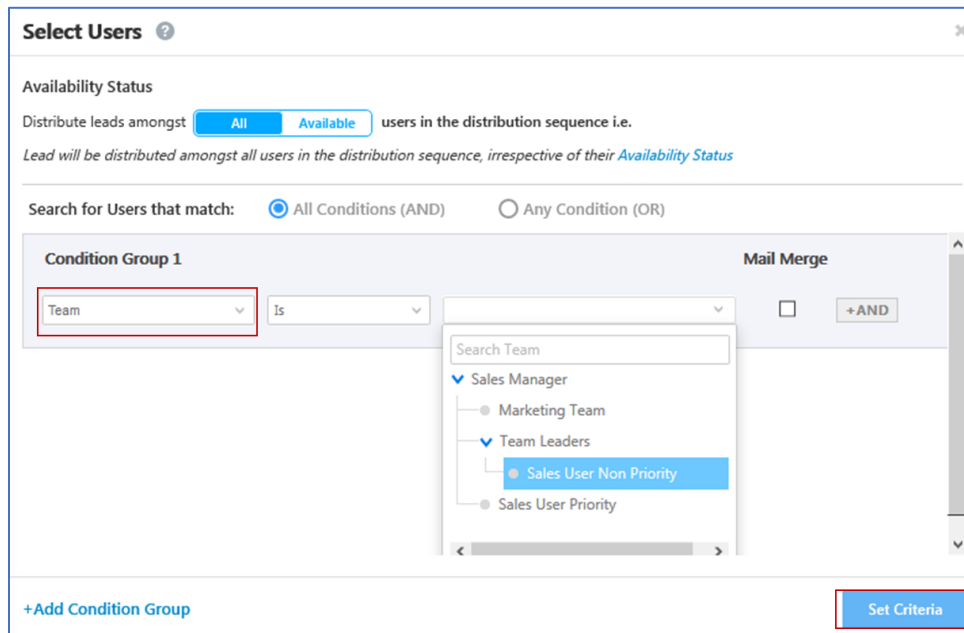
Step 13: For **assign leads to/based on**, select User Properties and click on Choose user properties link to select the Sales User Non Priority team. Click on Set Criteria once done.



Rule 1

If *Lead Quality is less than or equal to 5*

then assign Leads to/based on User Properties Choose user properties



Select Users

Availability Status
Distribute leads amongst All Available users in the distribution sequence i.e.
Lead will be distributed amongst all users in the distribution sequence, irrespective of their Availability Status

Search for Users that match: ☒ All Conditions (AND) ☐ Any Condition (OR)

Condition Group 1

Team Is

Mail Merge ☐ +AND

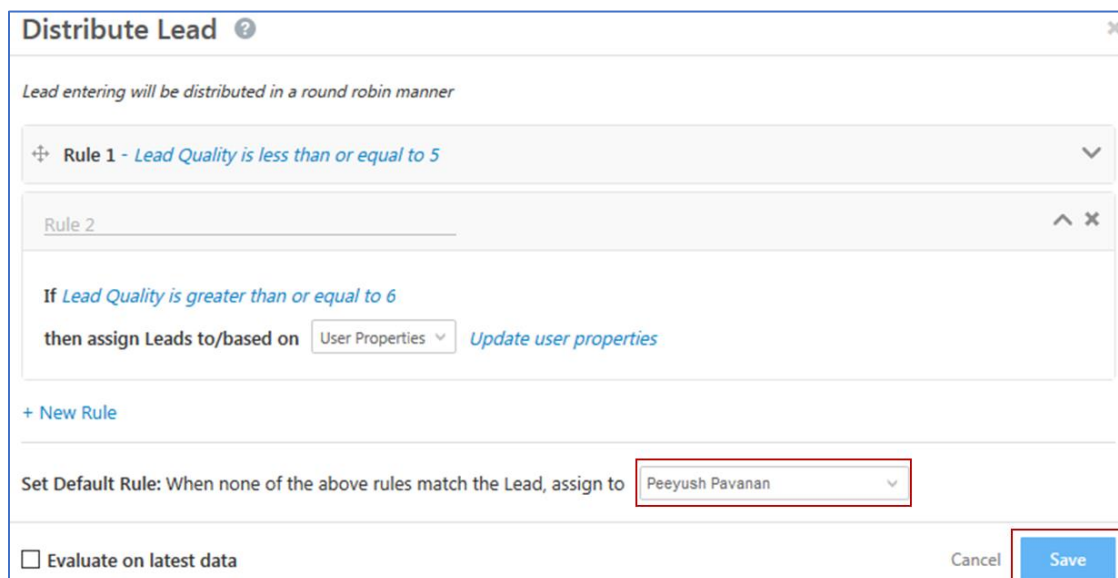
Search Team

- ▼ Sales Manager
 - Marketing Team
 - ▼ Team Leaders
 - Sales User Non Priority**
 - Sales User Priority

+Add Condition Group Set Criteria

Step 14: DIY- Click on New Rule link to create Rule 2. Like rule 1, set the condition for rule 2 as Lead Quality is greater than or equal to 6. Assign leads to Sales User Priority team.

Step 15: Set Default Rule assignment to yourself. Click on Save.



Distribute Lead

Lead entering will be distributed in a round robin manner

Rule 1 - Lead Quality is less than or equal to 5

Rule 2

If *Lead Quality is greater than or equal to 6*

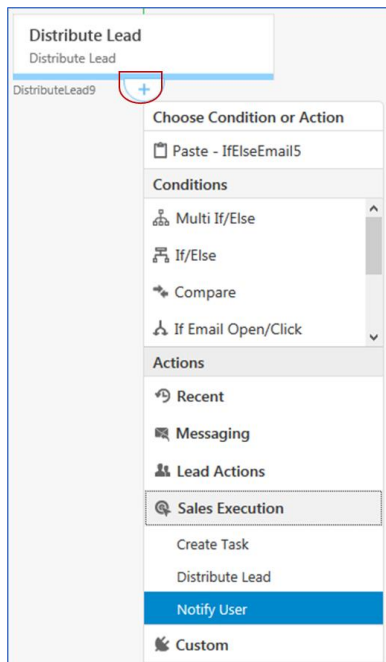
then assign Leads to/based on User Properties Update user properties

+ New Rule

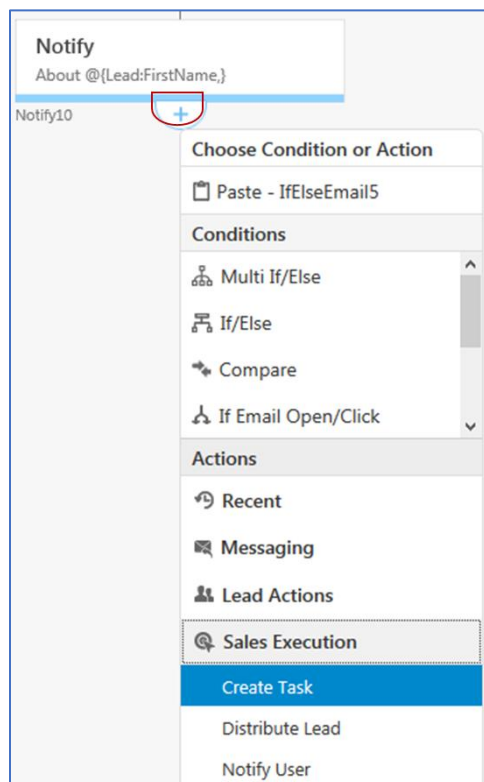
Set Default Rule: When none of the above rules match the Lead, assign to Peeyush Pavanan

☐ Evaluate on latest data Cancel Save

Step 16: Click on + icon below Distribute Lead card and select Notify User action under Sales Execution to send the notification to the respective lead owners. Click on Save once you are satisfied with the content that will be sent to the lead owners.



Step 17: Click on + icon under Notify User card and select Create Task under Sales Execution.



Step 18: Select Follow Up from the drop down and retain everything else as it is. Click on Save.

Create Follow Up

Owner * [Sales Meeting]

Subject * [Sales Demo]

Schedule * [Webinars]

Reminder [Follow Up] (s) before the task starts at 09:00 AM

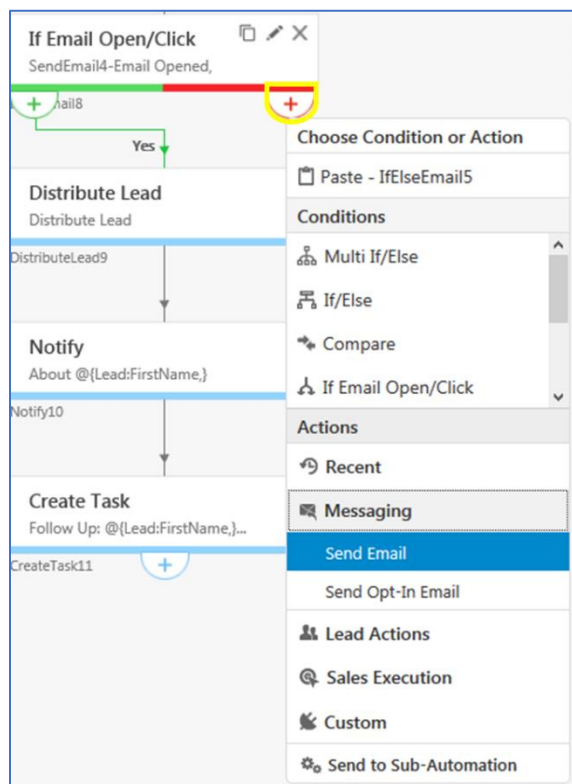
Description Type @ to mail merge field(s)

Organizer * [Lead Owner]

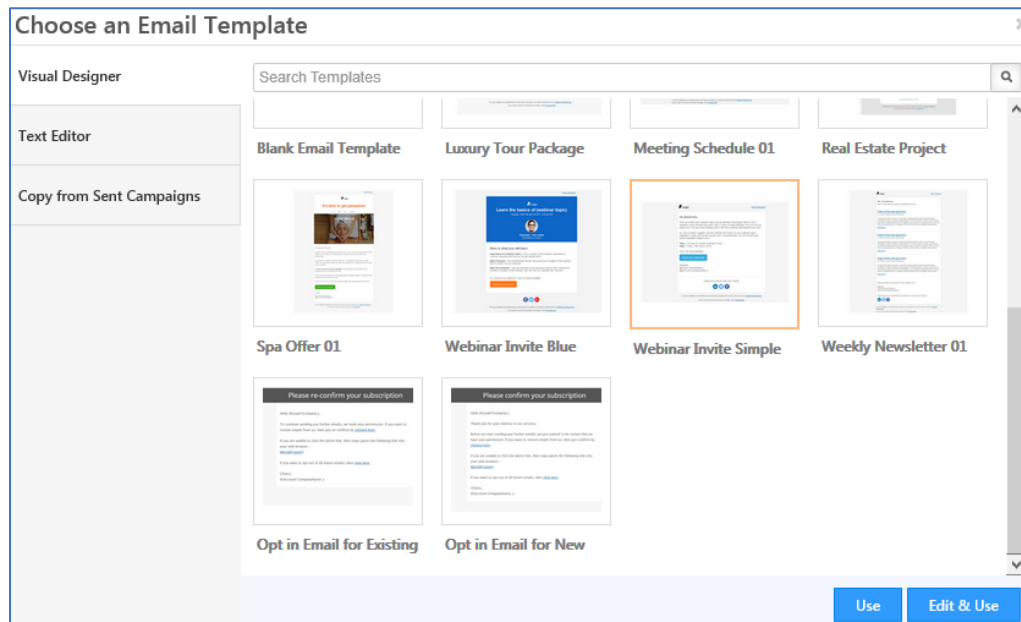
Note: The reminder will be sent immediately if the reminder time is in the past.

Cancel Save

Step 19: Now for the path where in the Email is not opened, we will send the reminder email. To do so, click on red + icon under If Email Open/Click card and select Send Email under Messaging.



Step 20: Select **Webinar Invite Simple** template this time. Edit the content with “Register for upcoming Webinar by S.H.I.E.L.D. Insurance firm” inviting leads to register for the webinar with a link to your “Power To You” landing page in it. Give an apt subject line with it.

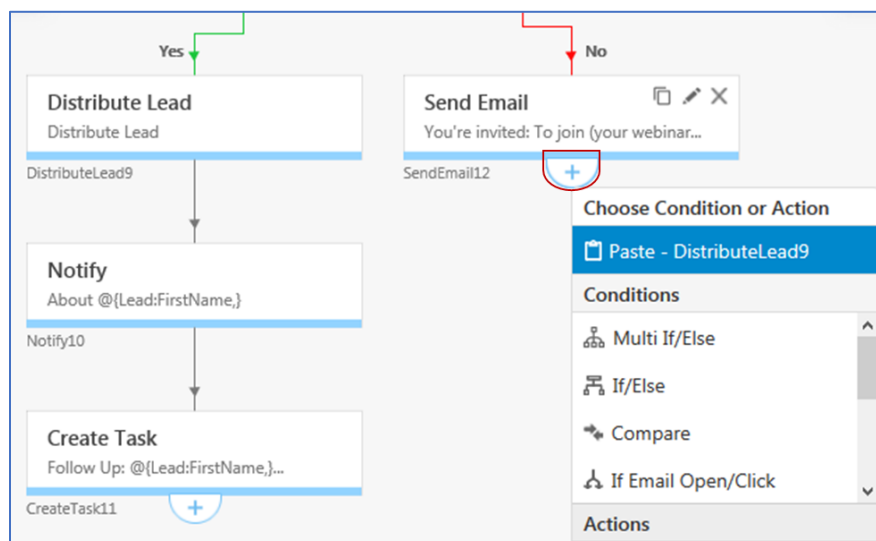


Step 21: This time we will not be validating if the leads are opening the email or not. We will be distributing the leads among the Non Priority Sales User and Priority Sales User teams with notification to lead owner. Also, creating Follow Up task like what we did before.

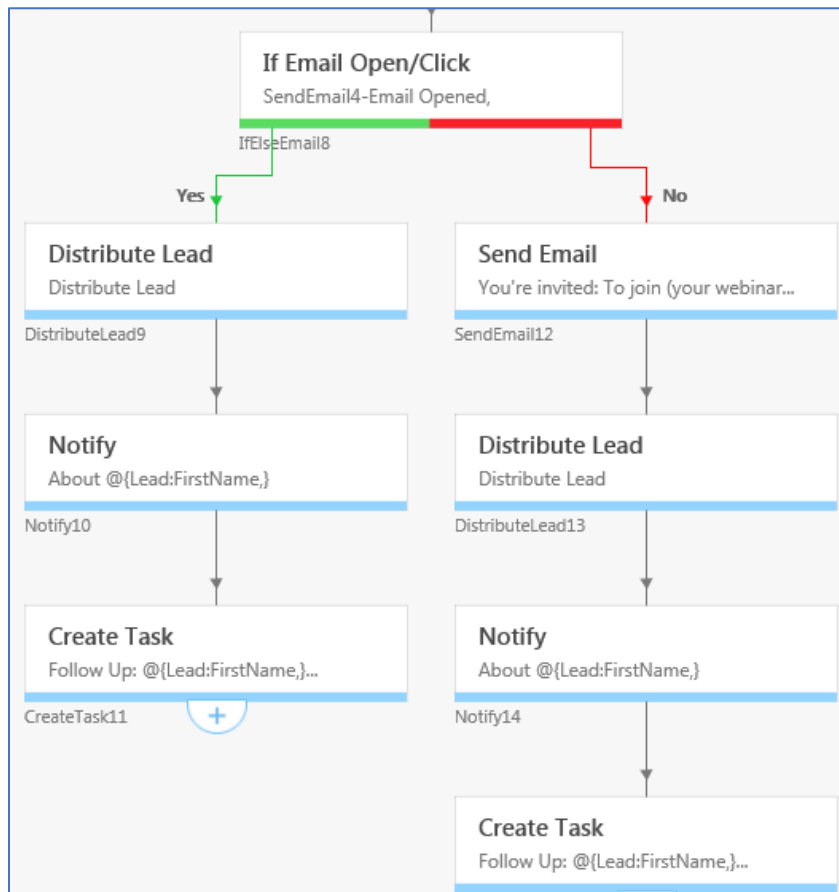
To do so, we won't set it up from scratch, but we will copy the existing Distribute Leads card, Notify User card and Create Task and paste it under Send Email card.

Hover over Distribute Lead card and click on copy icon (📄).

Step 22: Click on + icon under second Send Email card and select Paste – Distribute Lead option



Step 23: Do the same for existing Notify User card and paste it under copied Distribute Lead card. Once done, copy existing Create Task card and paste it under copied Notify User card. Once done, it should look like the screenshot given below:



Step 24: Click on Publish button on top then Yes on the confirmation screen to publish the Automation.

