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

Contents

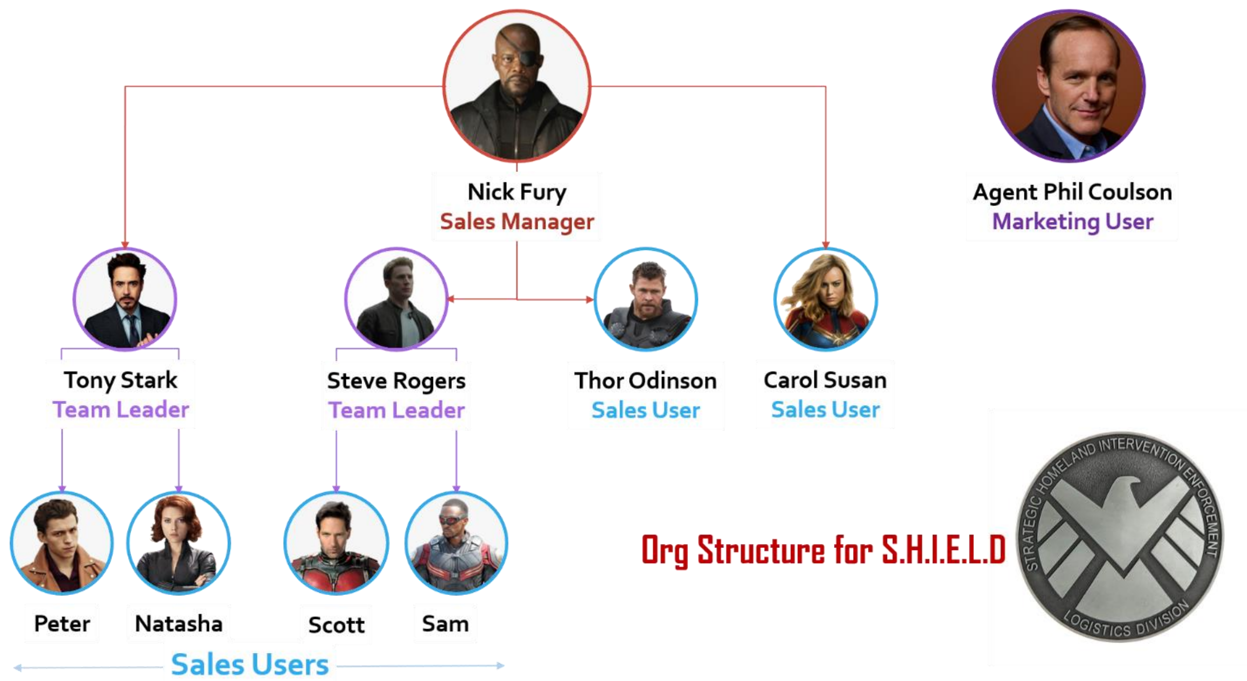
Business Scenario

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.

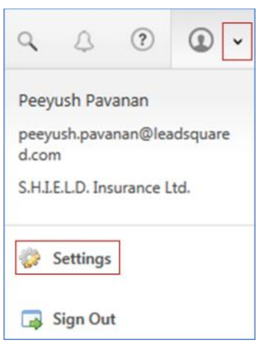
User roles are pre-defined in each LeadSquared account. Thus, as we create new users, we will also assign roles as per the business case. Roles assigned to the users define the level of access user will have when they login to LeadSquared. Following are the four roles:

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

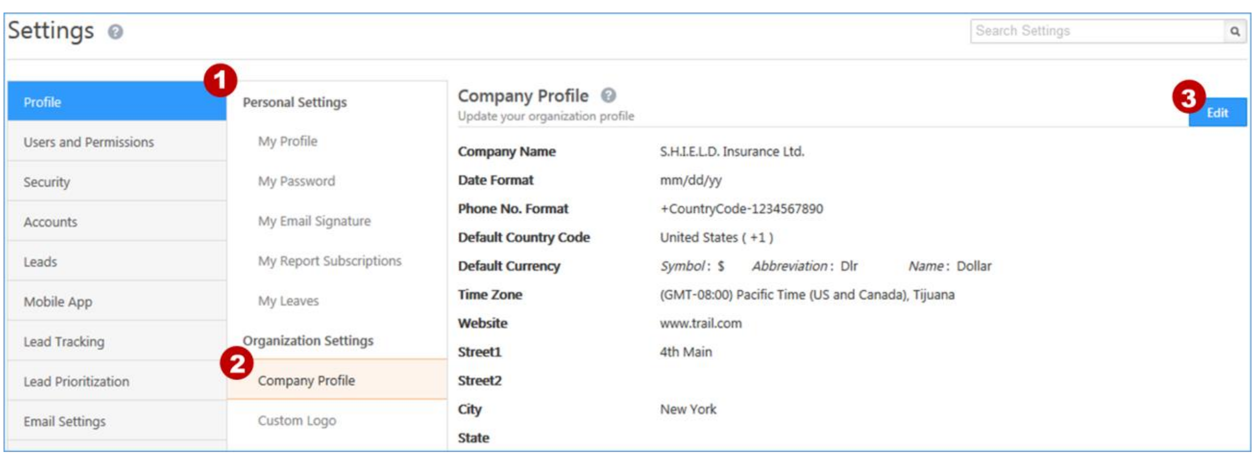
Company Profile is a very simple settings page that allows you to update basic company data. You must provide Company Name and address data before you can use Email Campaign feature. The Company Name and Address is used in the footer of Emails to meet Can-Spam guidelines.

Step by Step: Managing Company Profile

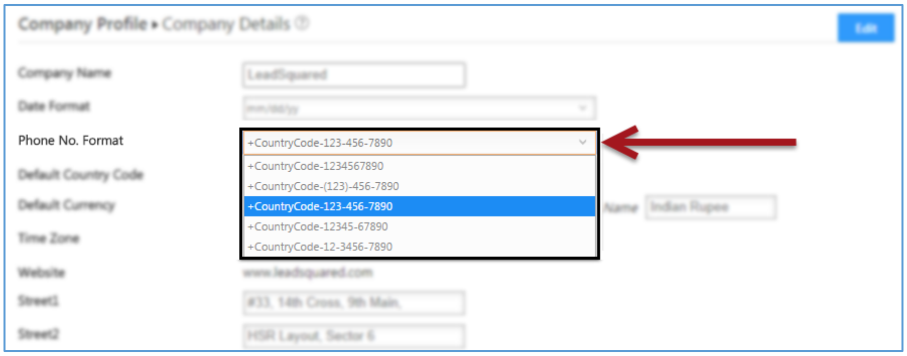
Step 1: Open Settings page from profile



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

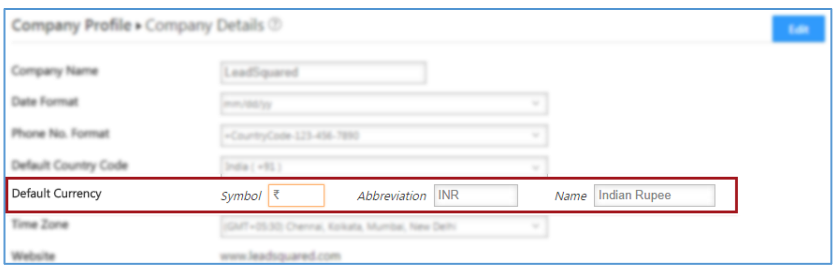


Step 3: Select the phone no. format and default country code as per your choice.



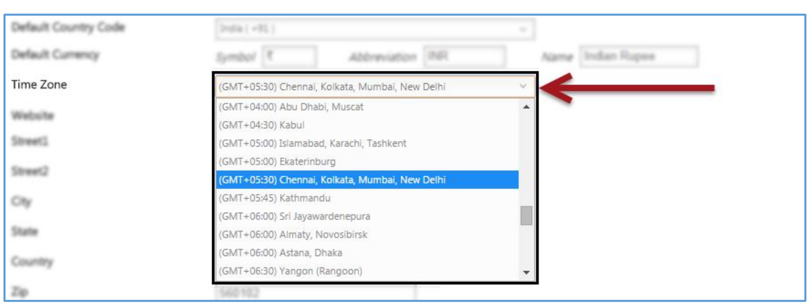
All the phone numbers of leads in LeadSquared will be displayed in form of selected phone no. format and the default country code will remain selected in add new lead forms when phone controller is used in phone no. fields

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 '$'



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.

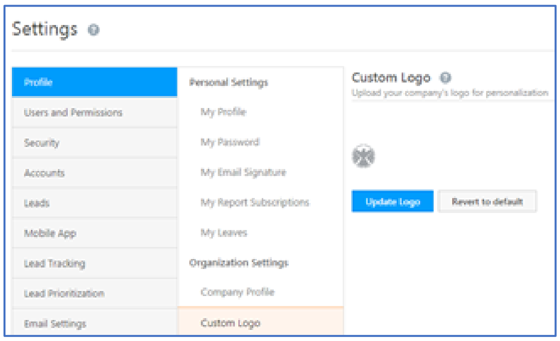


Step 6: Click on Save button to save the changes.

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

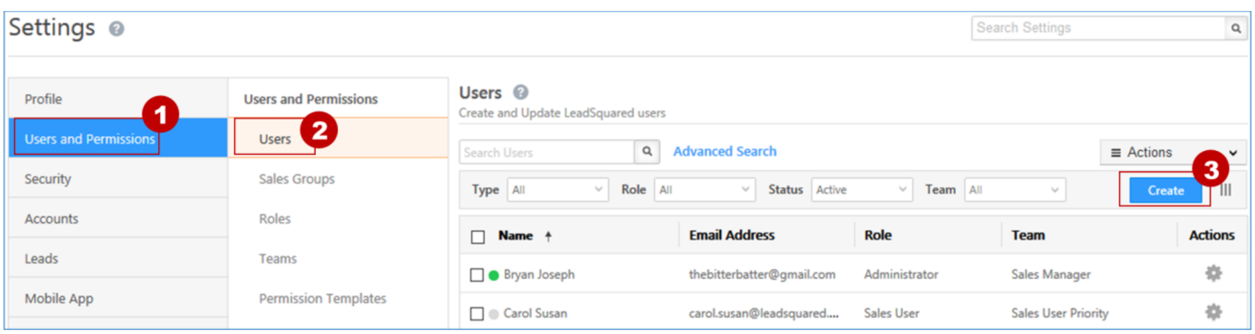
Click on "Custom Logo" under Organization Settings to add the company logo onto the LeadSquared platform. Click on Update Logo button to upload the image. Use any SHIELD image as the logo.



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**.



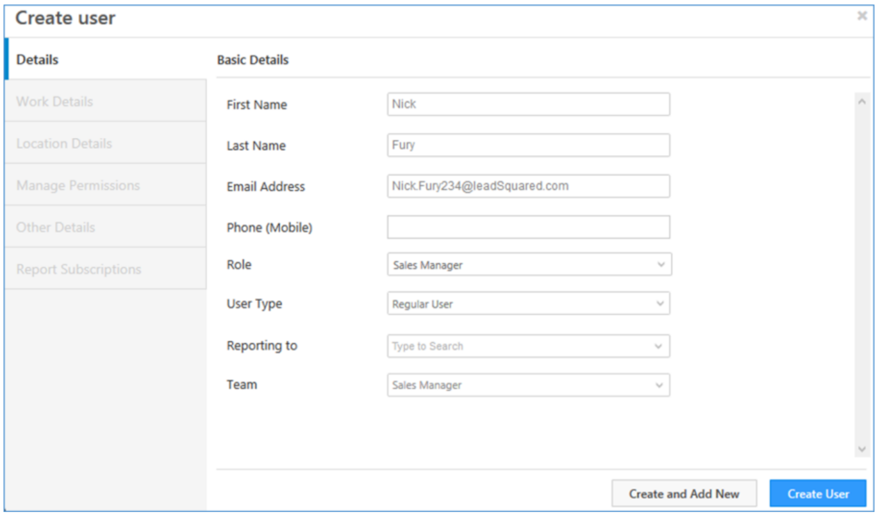
Step 2: On the Create User pop-up, fill in all the necessary details.

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.

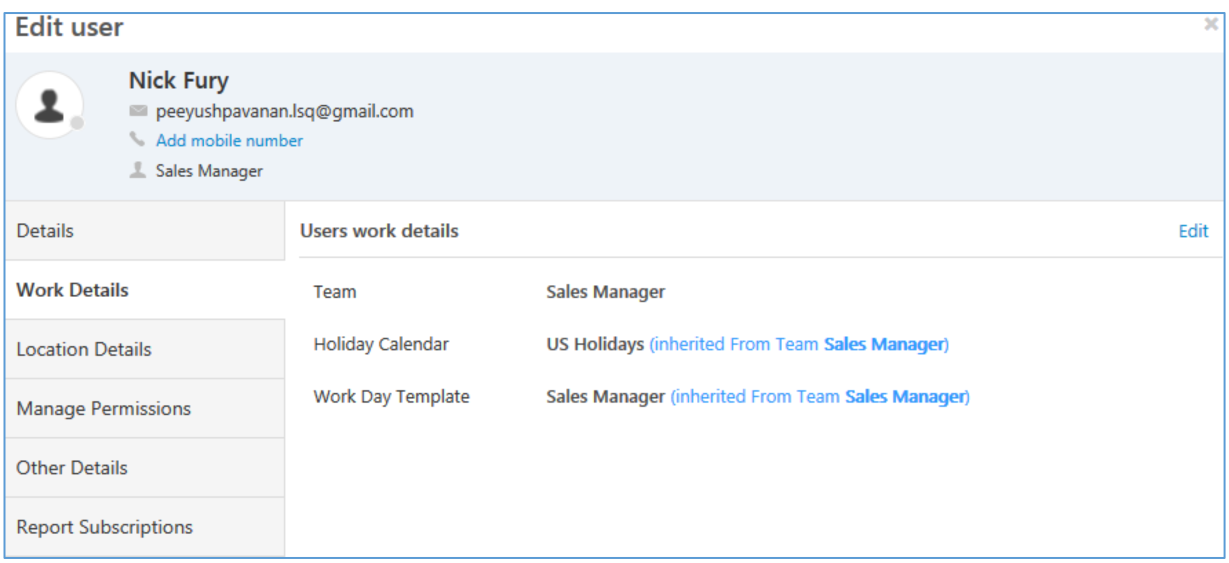
For Nick Fury: Enter First name as Nick, Last Name as Fury and Email address *any fictitious email address*. Assign the role of Sales Manager and User Type as Regular User



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

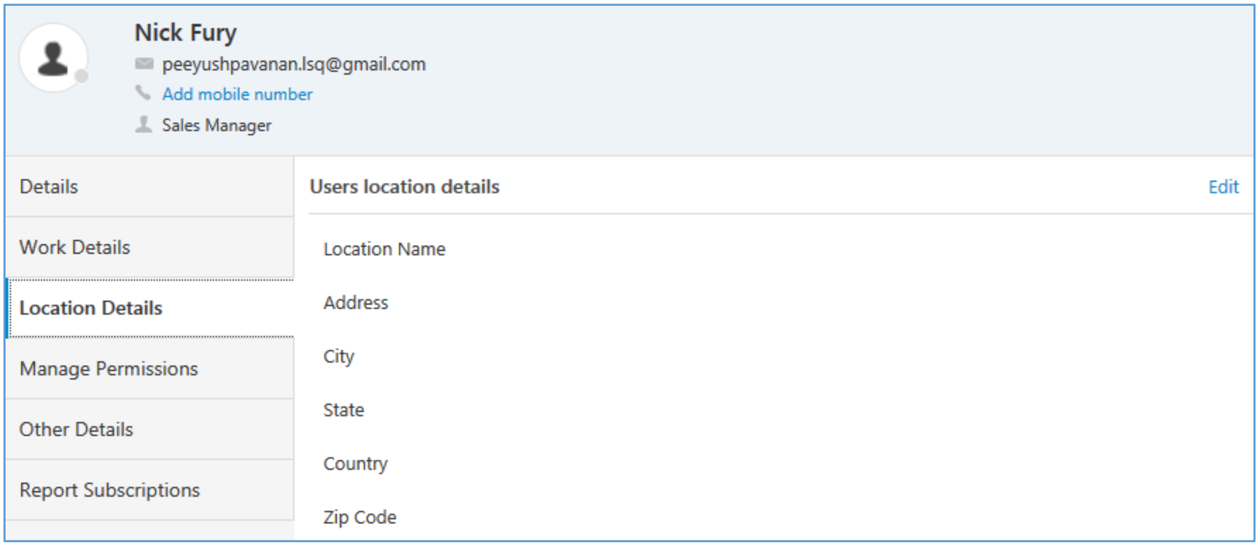
Here, you can add the user to a **team**, apply a **holiday calendar** and a **workday template**.



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

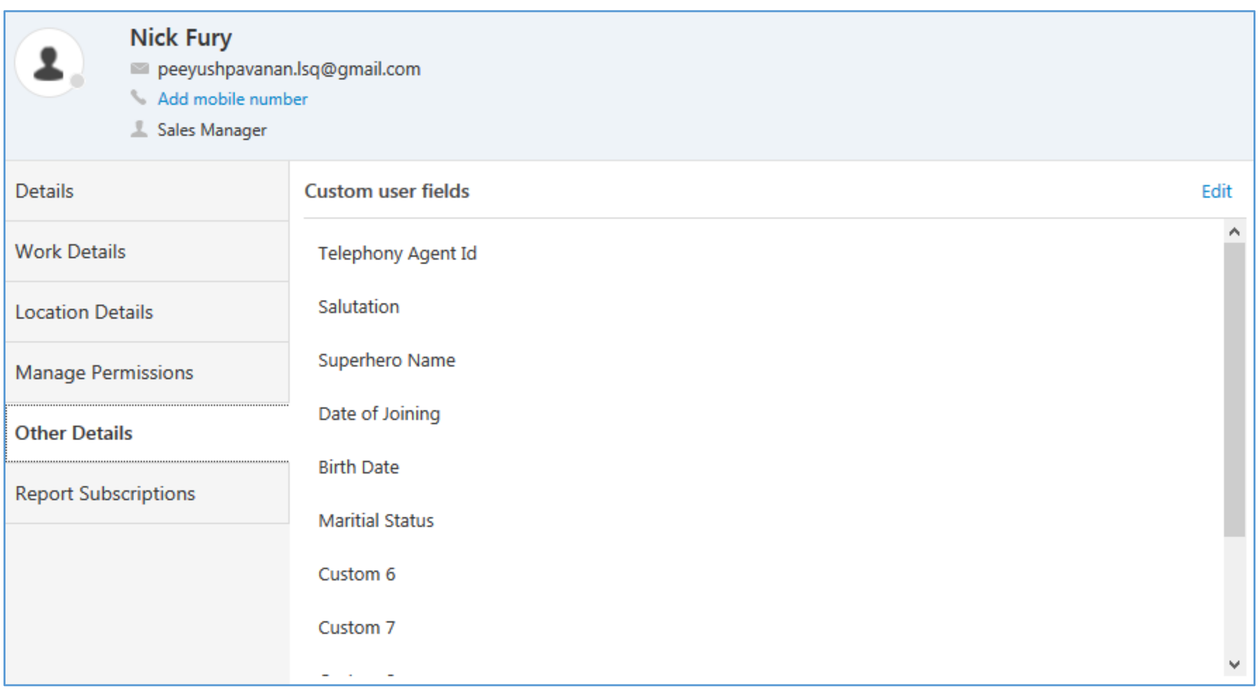
Location Details

Use this tab to enter the user's address.



Other Details

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



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

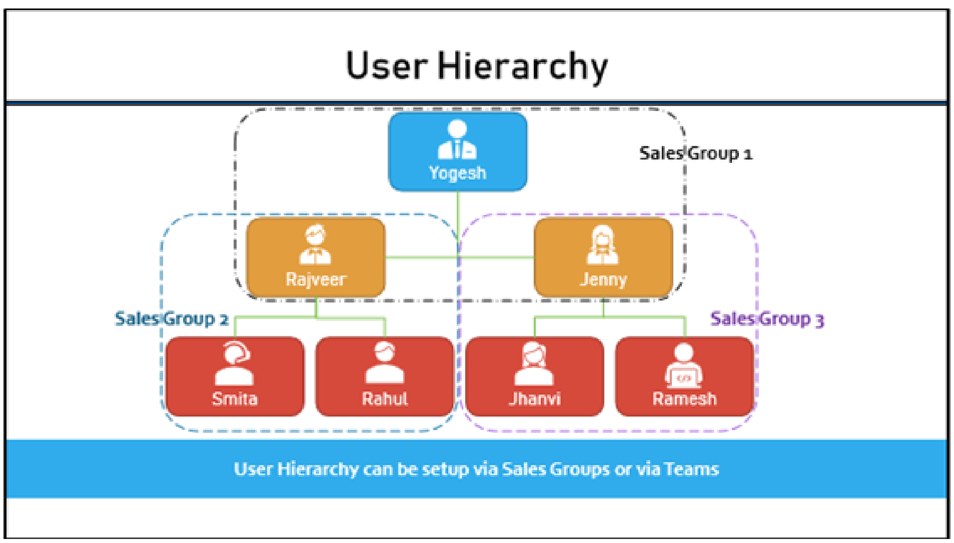
You can organize your sales users into different groups based on location, business unit or any other categorization of your choice. This makes it easier for you to manage your users and leads in keeping with your business use case.

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.

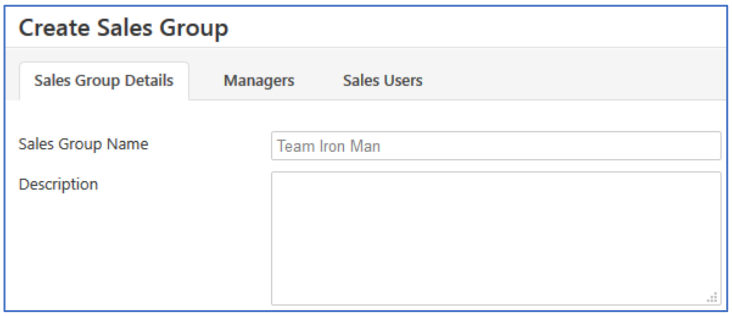
Alternatively, we can assign the role of sales manager to Yogesh and avoid creating a sales group for Rajveer, Jenny and Yogesh.

Step by Step: Creating Sales Group

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

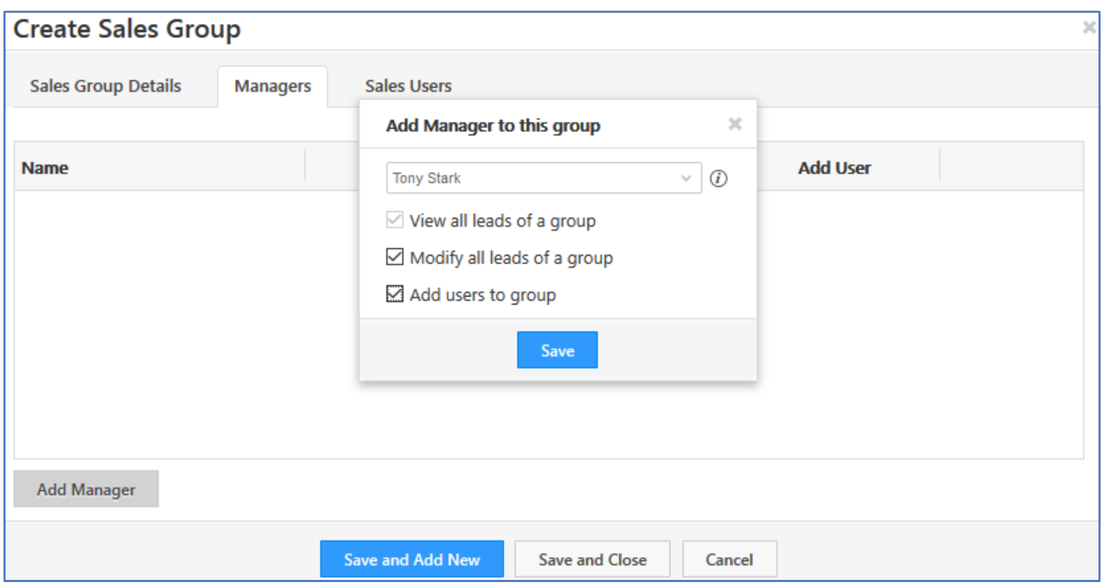
Step 2: Click on Sales Group. Click on Create button to get started.

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



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.

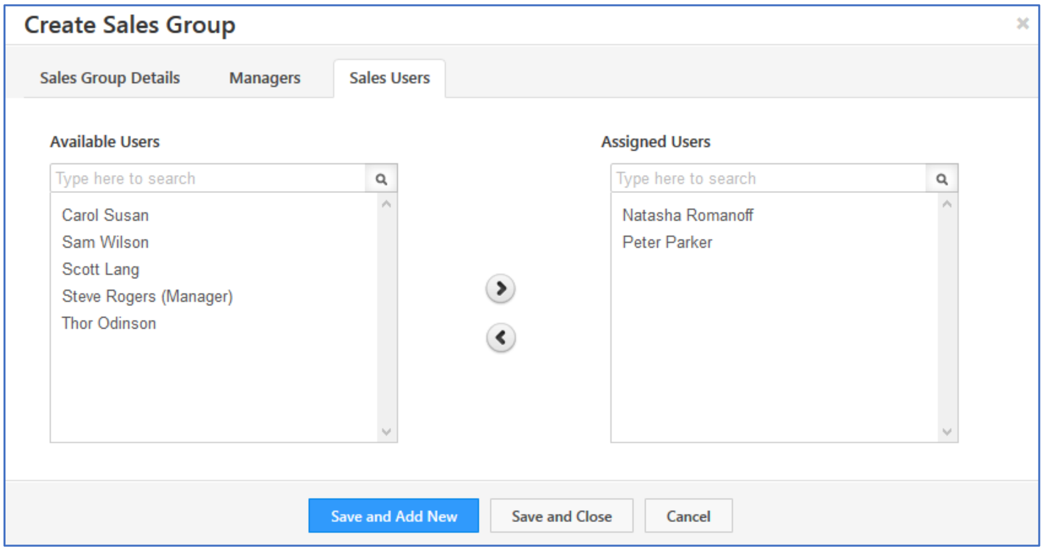
In our case, add Tony Stark as the group manager and give Modify all leads of a group access and Add users to group access.



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:



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

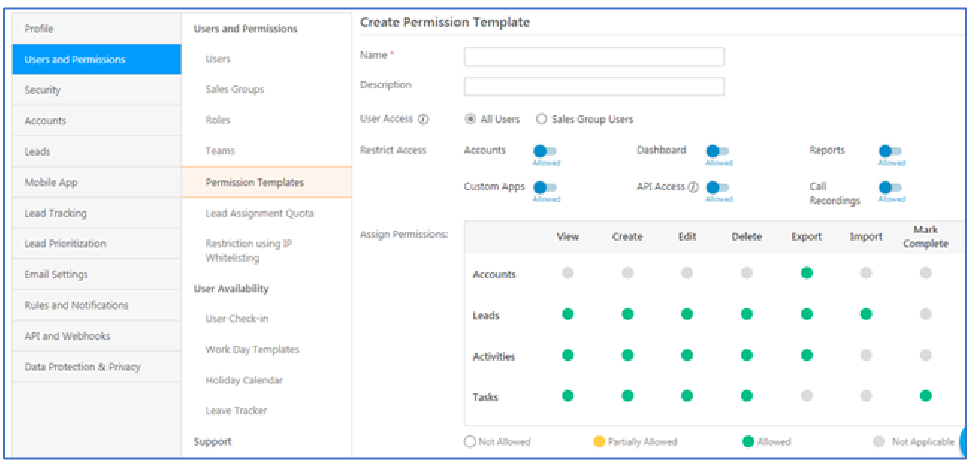
Permission templates let you configure access rights for your users. In other words, they let you control who sees what and which users can create, edit, delete, export or import your data.

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.



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:

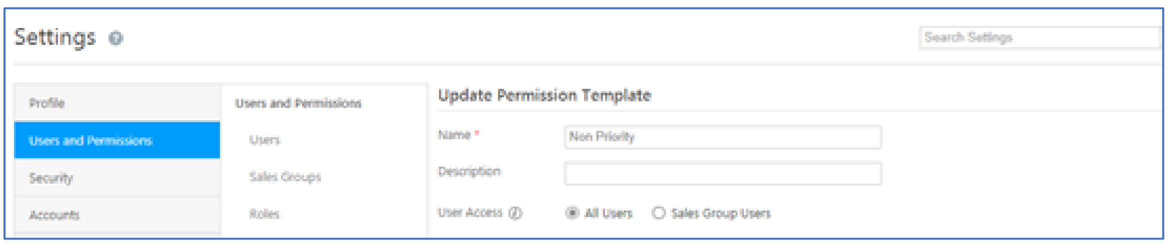
1. **Non Priority Permission template:**
    - Should not have Delete Lead access.
    - Lead fields Email, Phone Number and Mobile number should not be visible to them under View access, should not be editable under Edit access.
2. **Priority Permission template**: All access should be given except for Delete Lead access which should be Not Allowed in the permission template.

Step by Step: Creating Permission Template

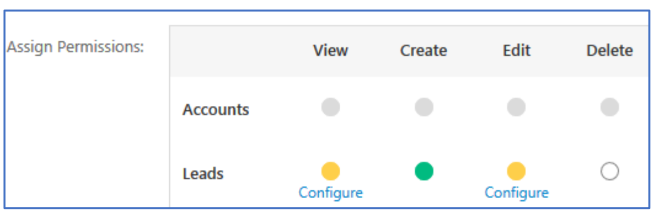
Step 1: Navigate to Settings

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

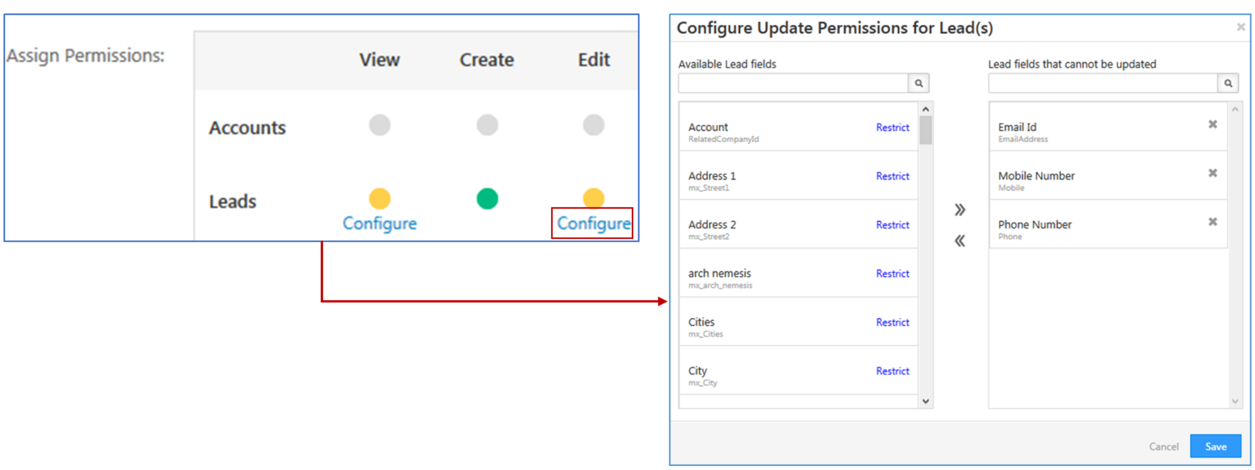
Step 3: Click on Create to Create and name the template as Non Priority.



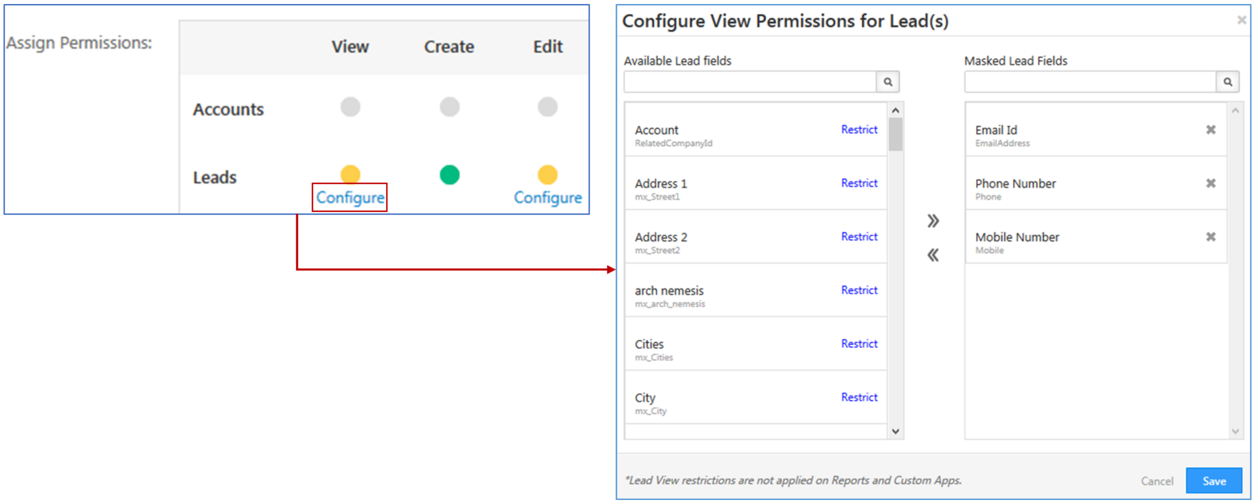
Step 4: According to the requirements mentioned above revoke the Delete access for Leads by making it Not Allowed. Click on the node to assign Not Allowed access.



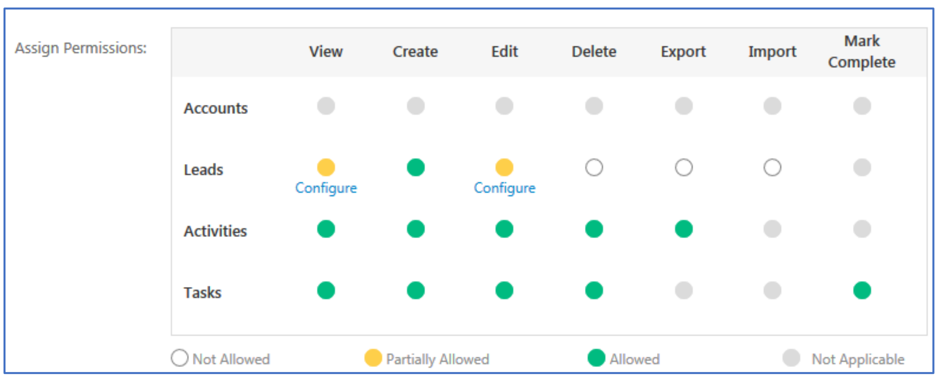
Step 5: For Edit node of Leads, make it Partially Allowed by clicking on the node. Click on Configure link appearing below the node. Click on Restrict link next to the fields you need to restrict. In our case, it will be Email, Phone Number and Mobile Number.



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



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

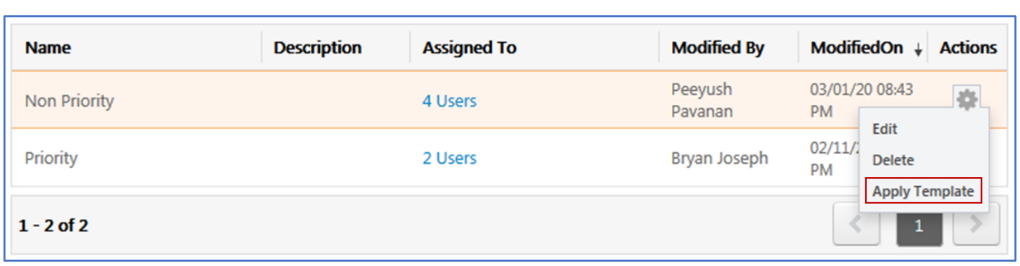


Step by Step: Assigning Permission Template

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.

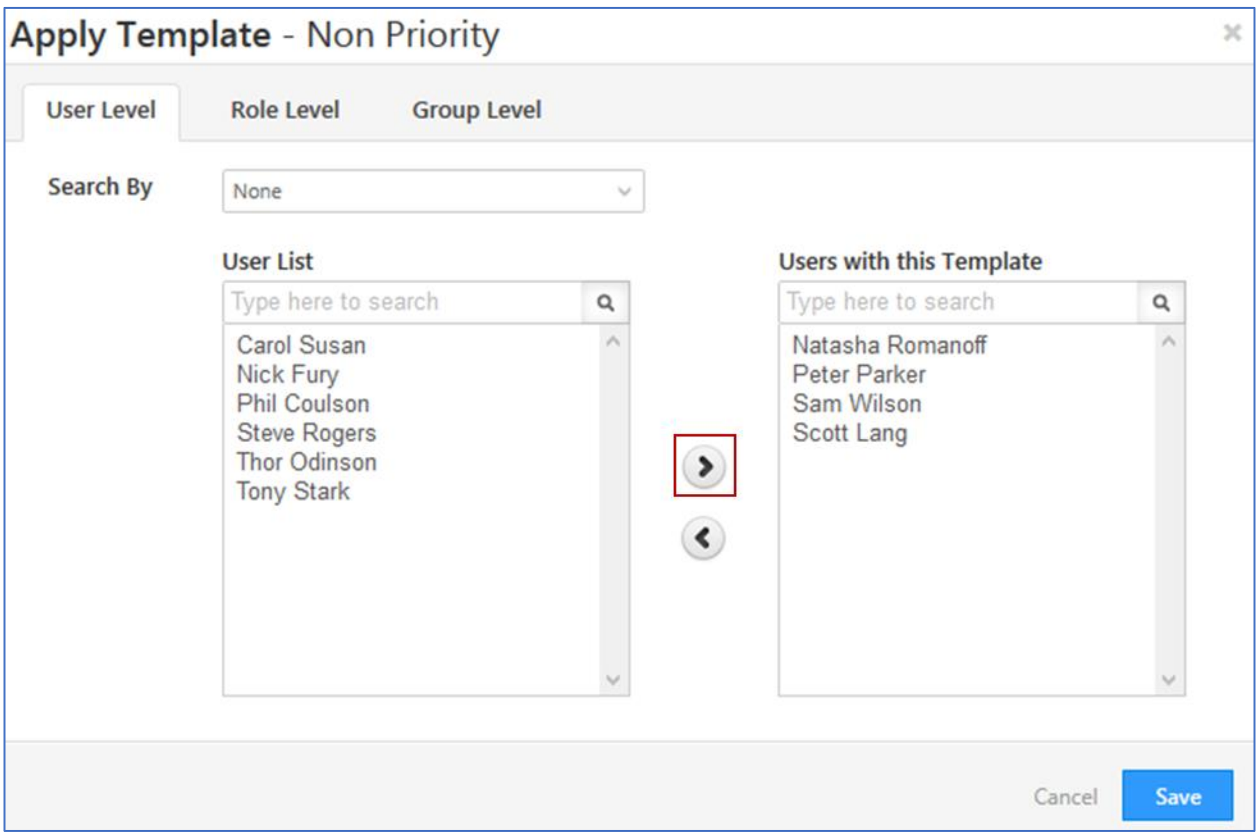


Step 3: To assign permission template directly to the users, go to User Level tab and select users. To assign permission template to Roles, go to Roles Level tab and similarly go to Groups Level tab to assign permission template to Sales Groups.

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).



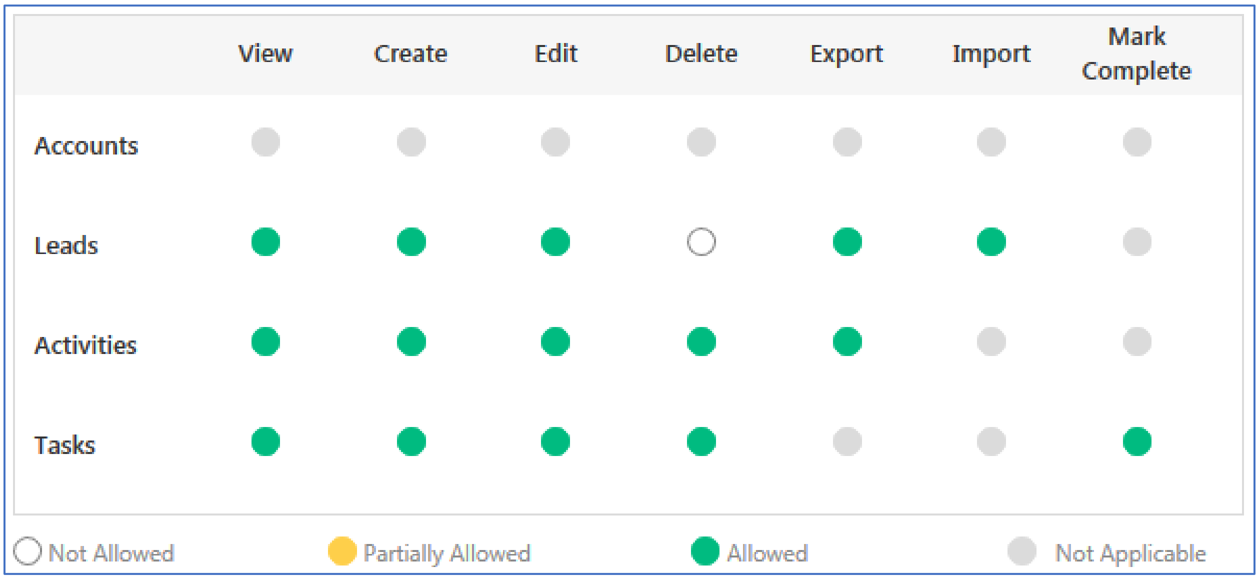
Step 4: Click on Save. With that, you have successfully assigned the Non Priority Permission template to Natasha, Peter, Sam and Scott.

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.



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.

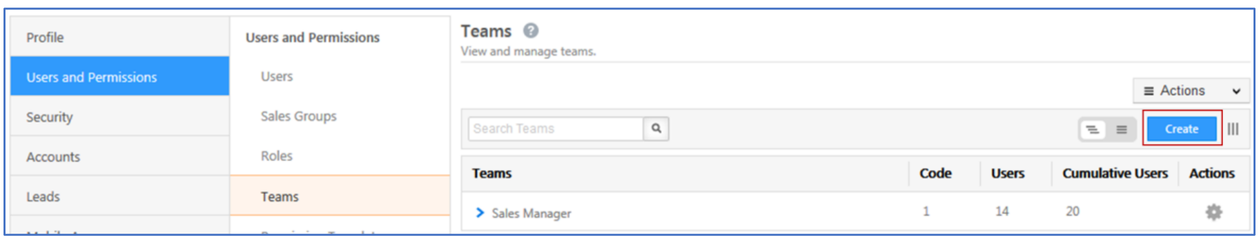
Before we explore each feature, let's see how we create a Team and how you add a user to a Team.

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.

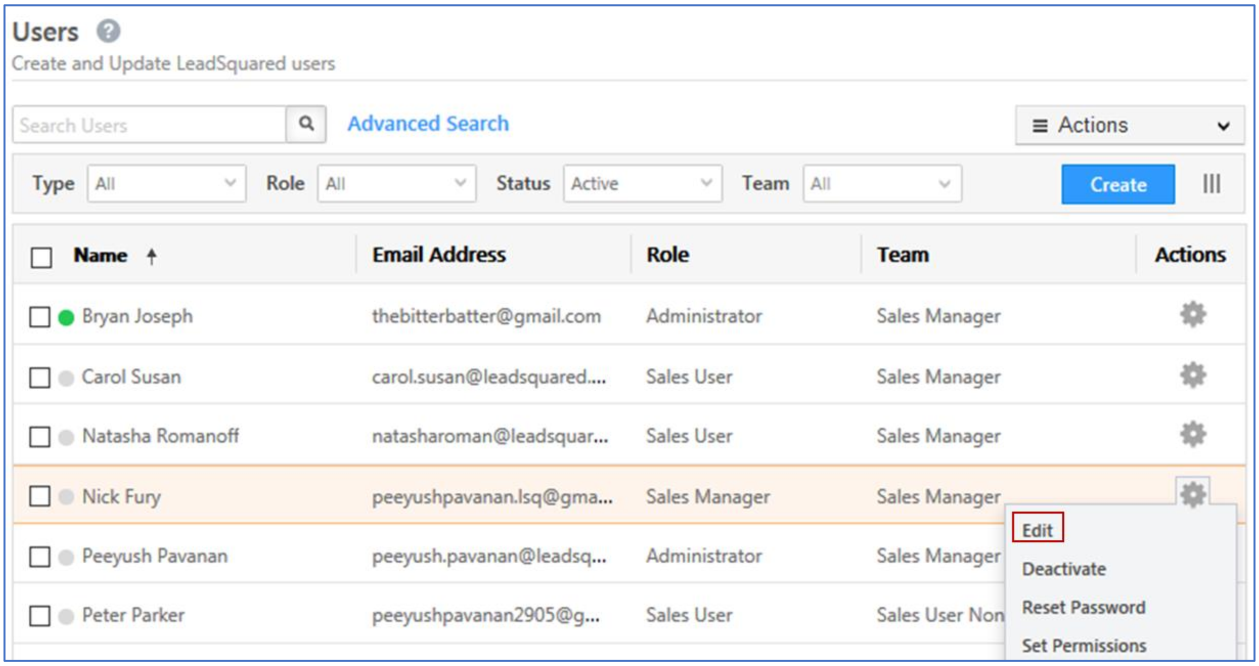
Note: Teams once created, can be deleted only if the following conditions are true:

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.

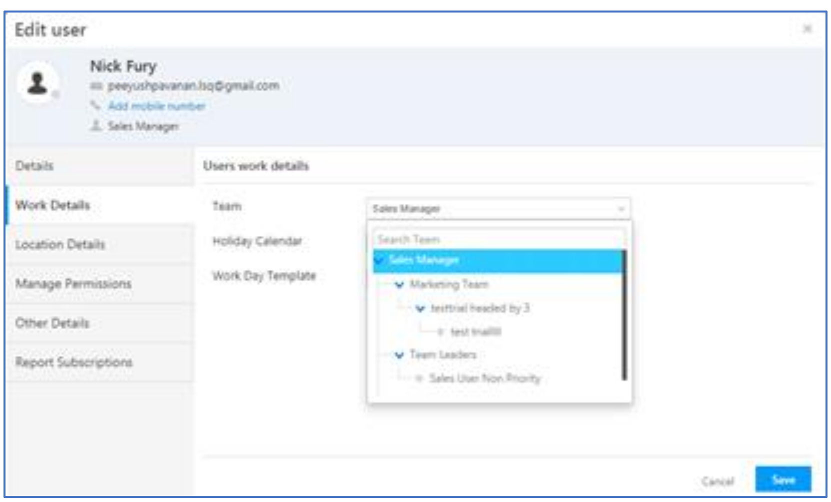
Step by Step: Adding a User to a Team

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.



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.

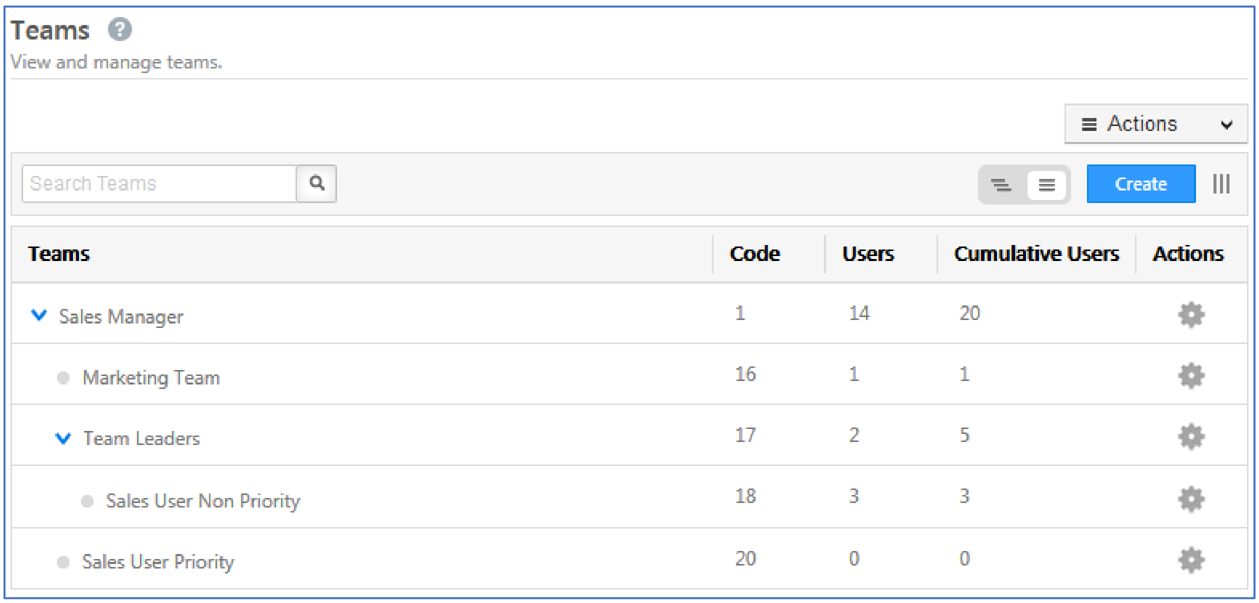


Next Steps

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:



Workday Template

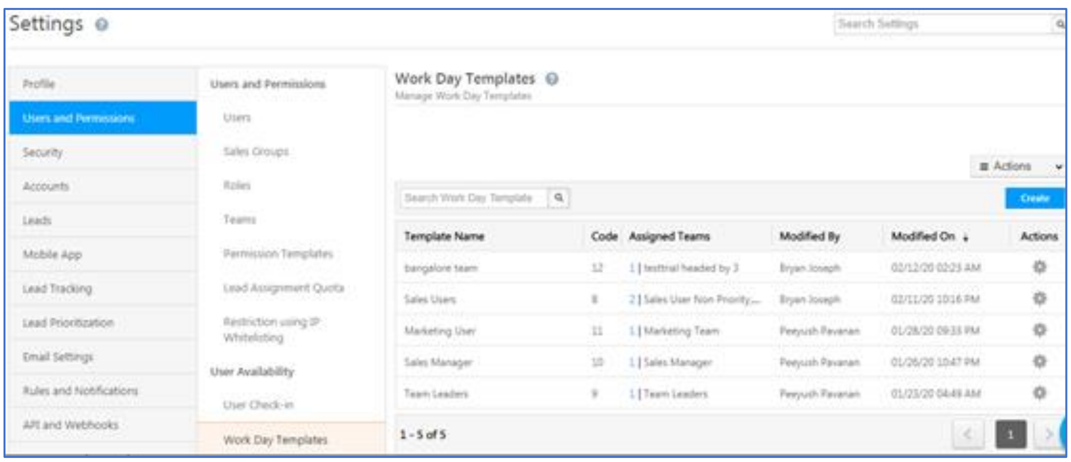
Workday templates let you define the schedule and working hours of your organization so you can automatically check-in your users* using Automations. It lets you set the time zone you work in, working days, office hours, and break timings

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.

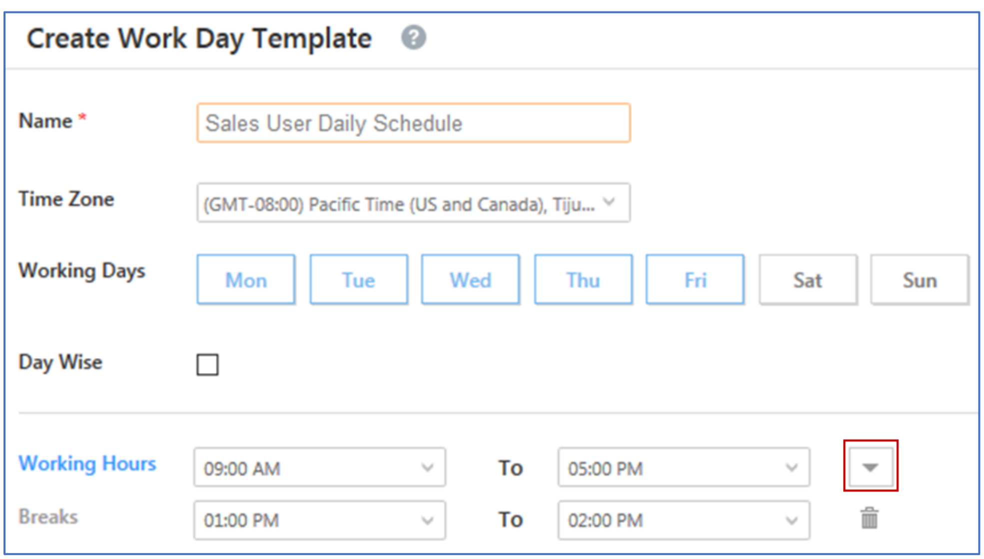
Step by Step: Creating and assigning Workday Templates

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.

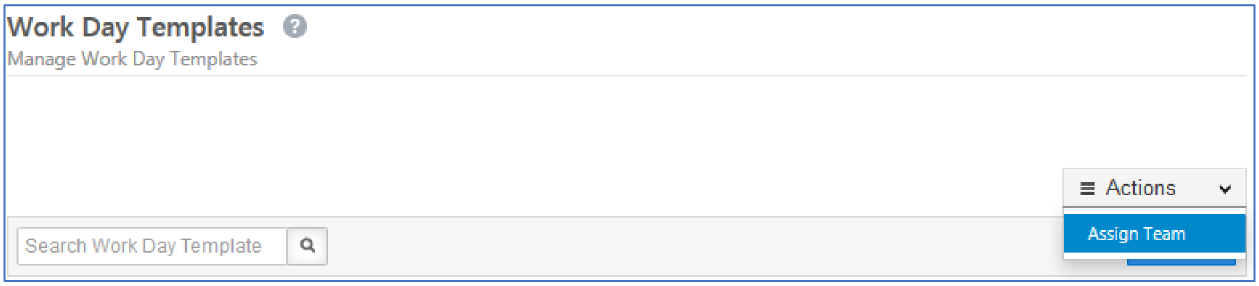


Note: To add Breaks, click on the dropdown icon highlighted in the screenshot given, above.

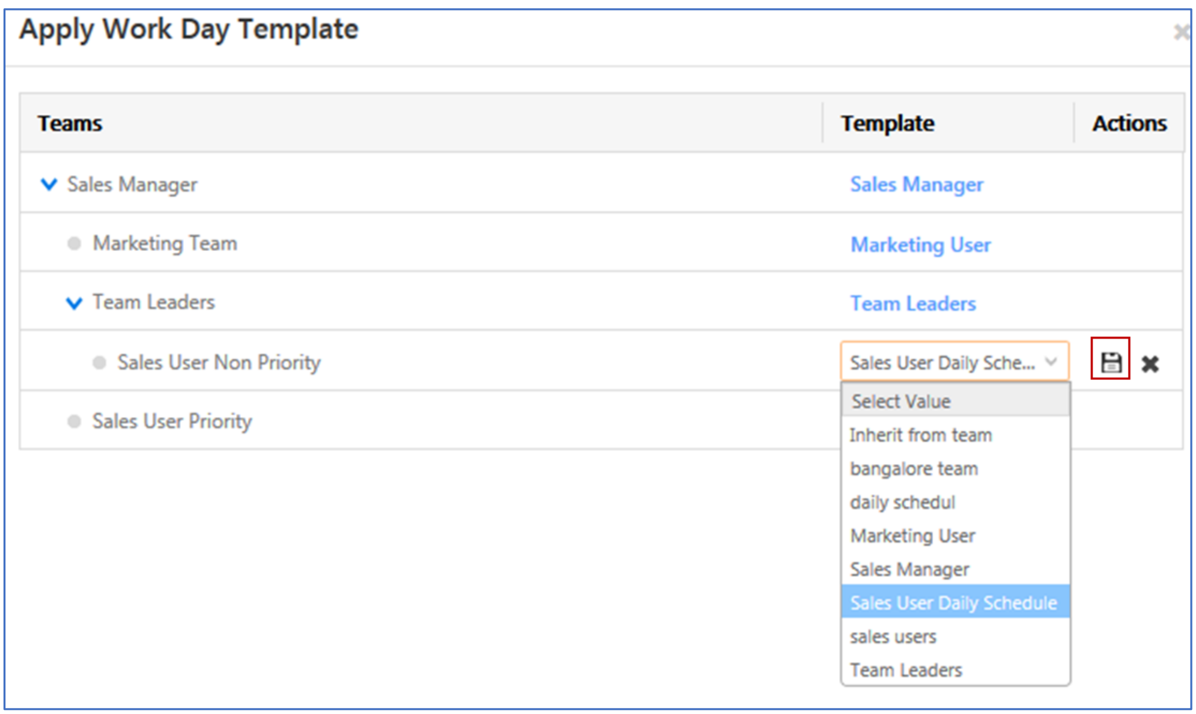
By ticking the day wise check box we can individually add the timings for each work day.

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

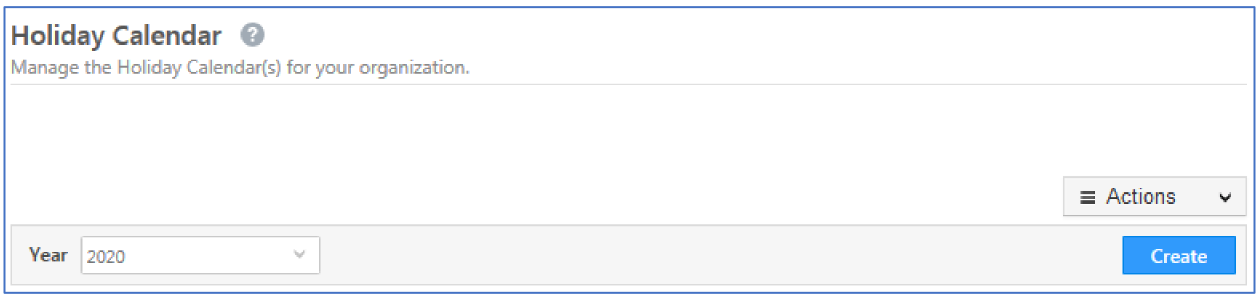
The Holiday Calendar feature lets you create your organizations holiday schedule in your LeadSquared account. You can apply the holiday calendars you create to different teams across different regions.

Let us create a holiday calendar called 'US Holidays' and setup 1^{st} of January as New Year, 4^{th} July as Independence Day, 27^{th} Nov as Black Friday and 25^{th} 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.

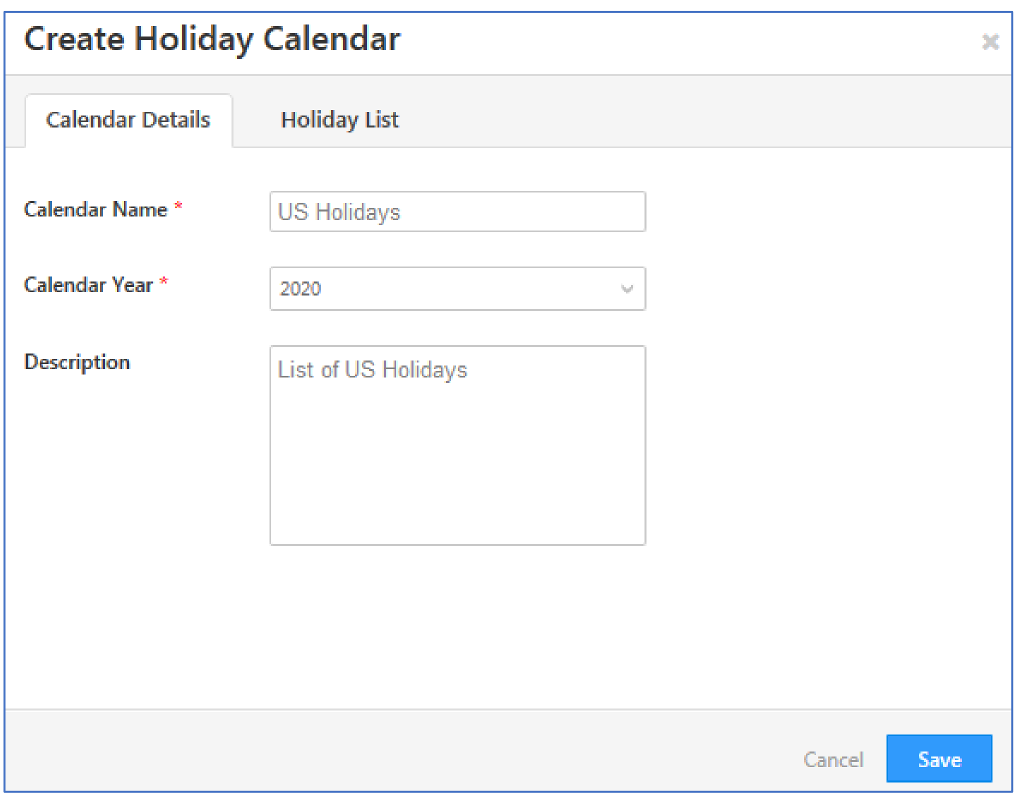
Step by Step: Creating and Assigning Holiday Calendars

Here's how you create the holiday calendar:

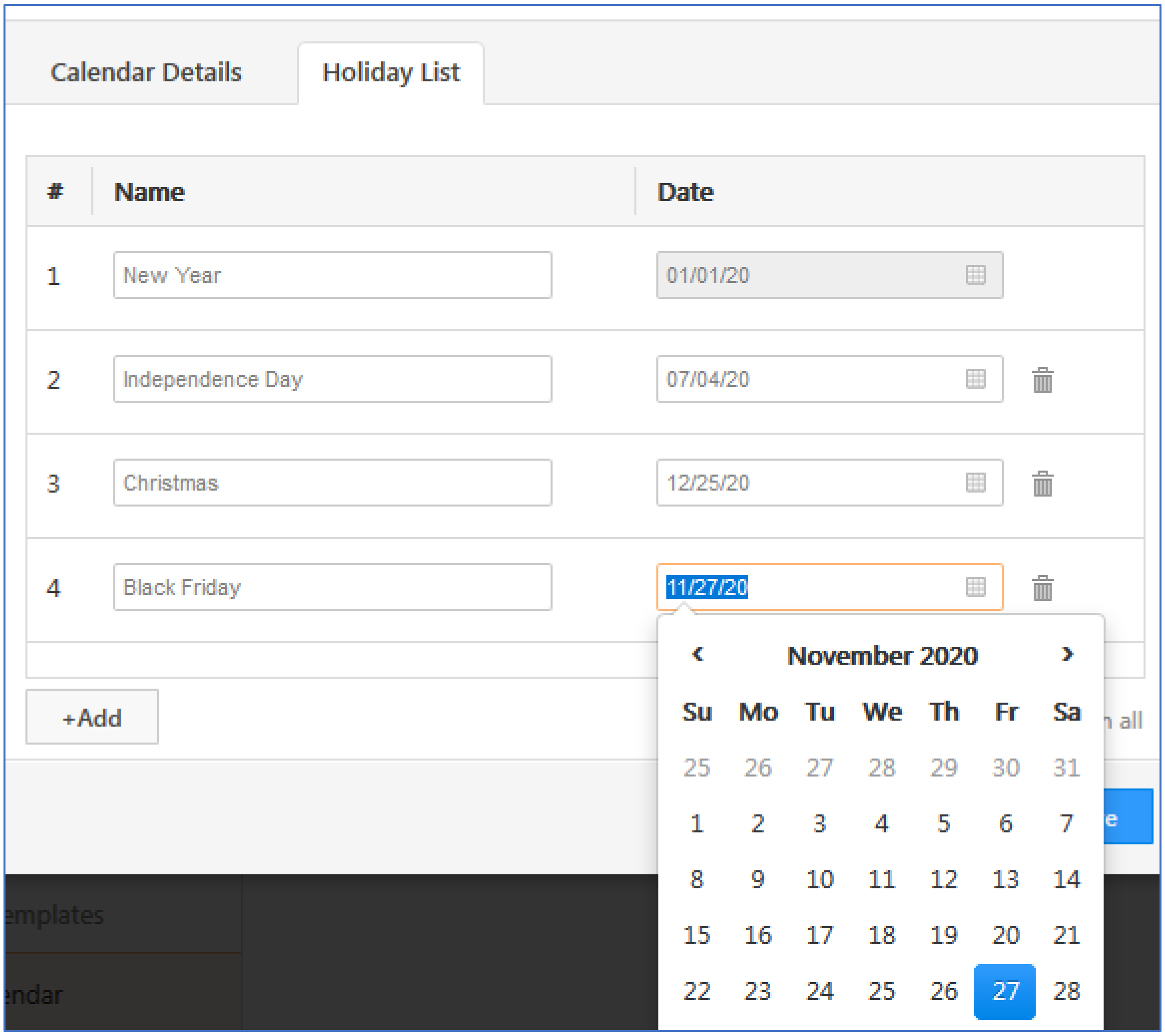
Step 1: Navigate to User and Permissions → Holiday Calendar and then click on Create



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

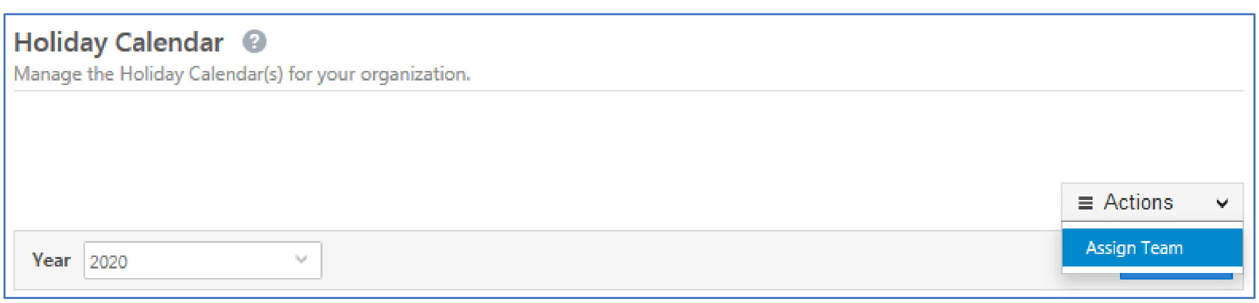


Step 3: Click on Holiday List tab. Here's where you add the specific days you want to add as holidays

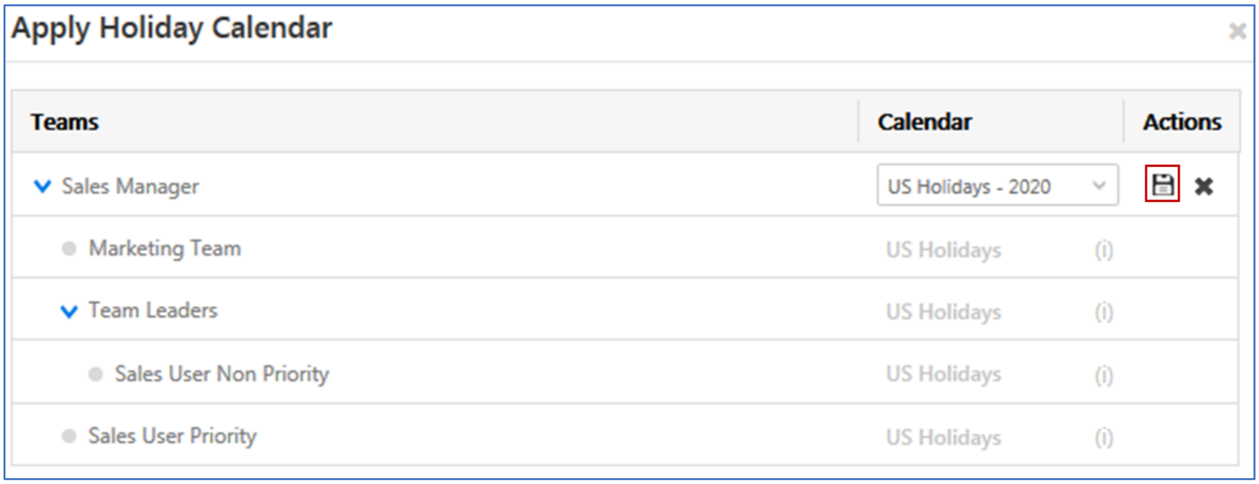


Step 4: Click on Save

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



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.



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.

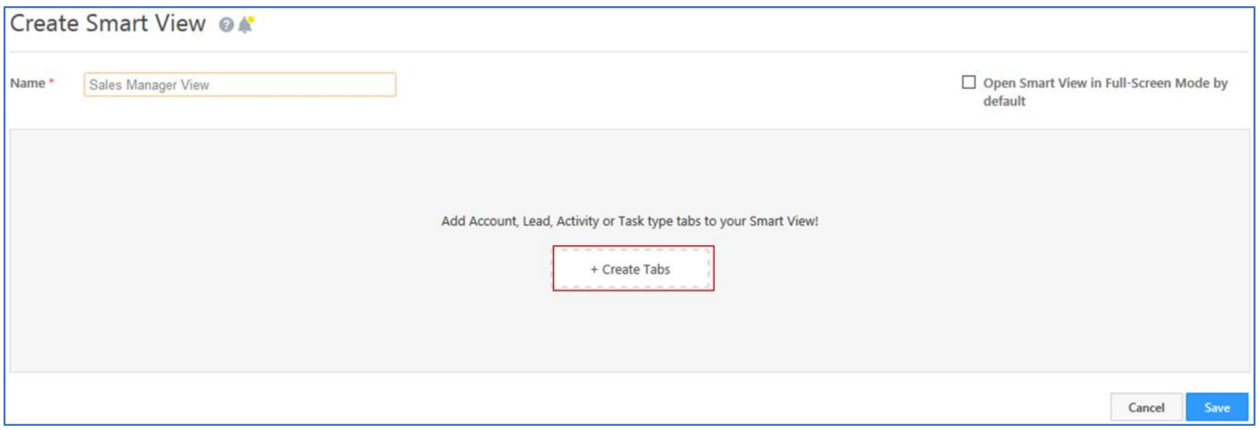
Let us create a Smart View called ‘Smart View Sales Manager’ for team ‘Sales Manager’ so that whenever Nick Fury who is part of this team logs into Smart Views, he will see

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

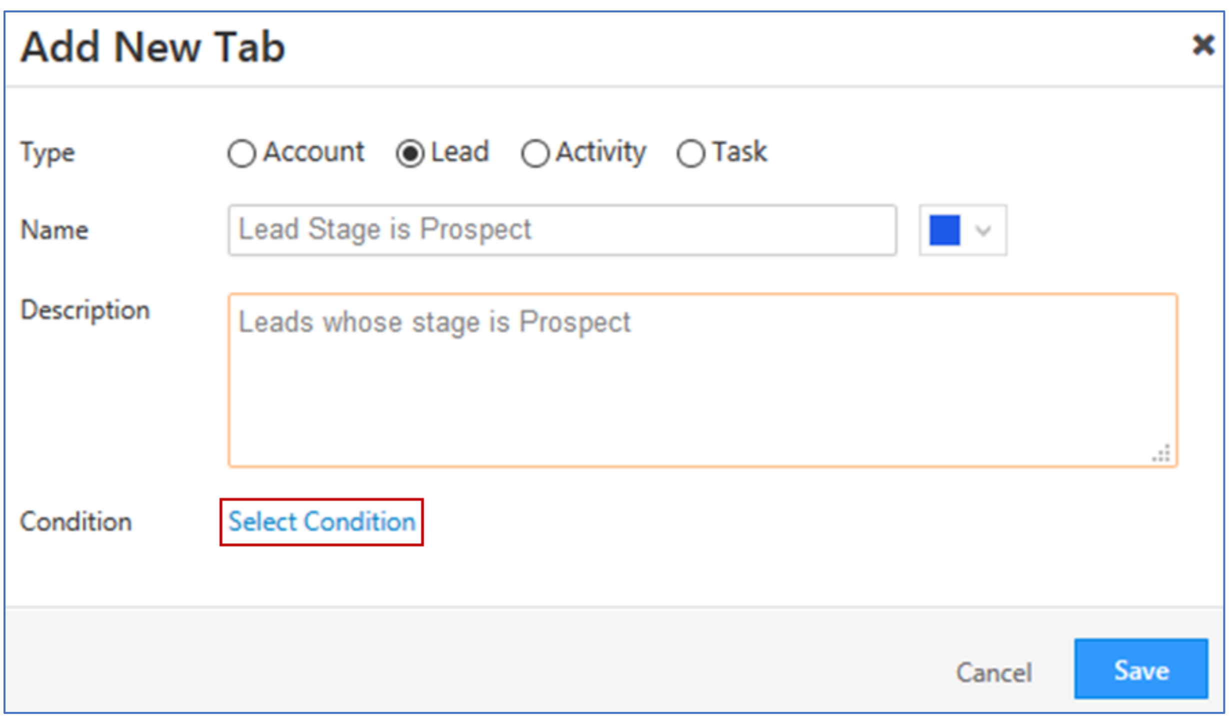
Step by Step: Setting up Smart View for Teams

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

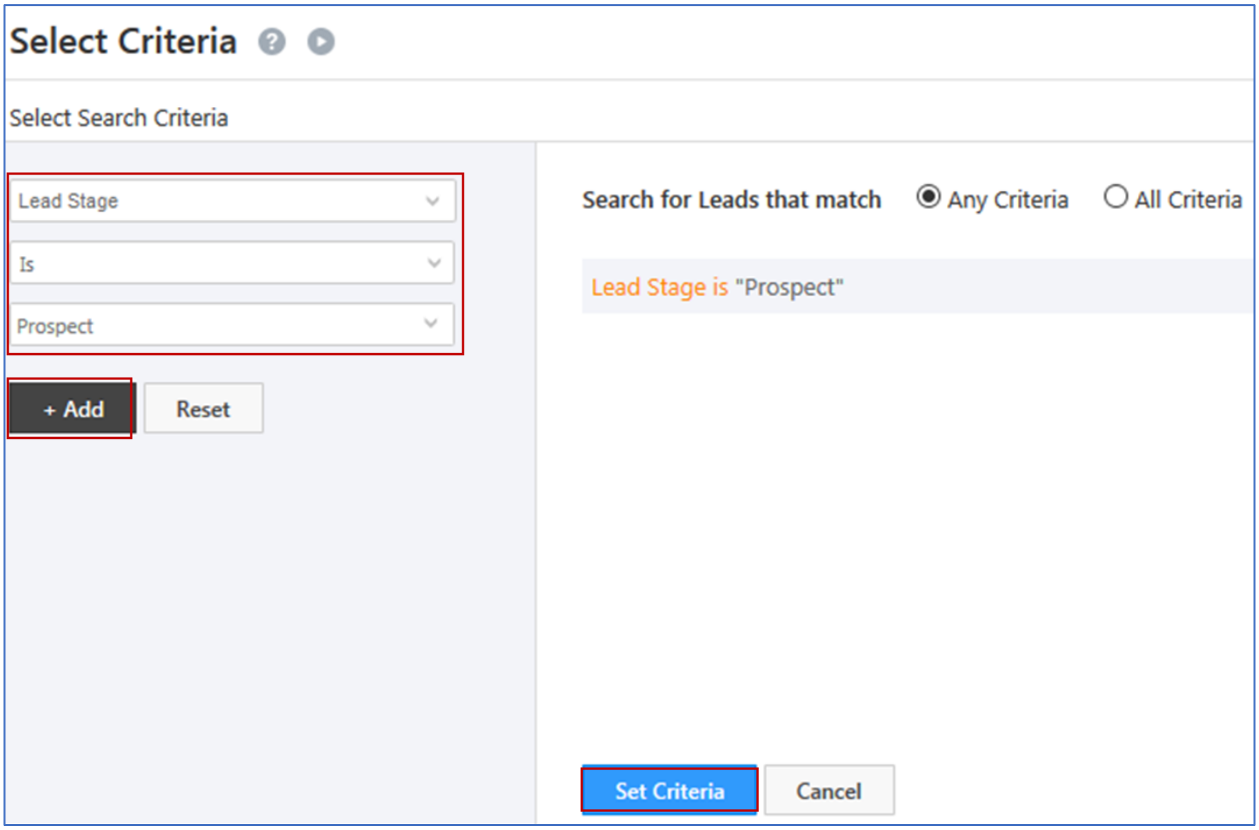
Step 2: Enter a name ‘Sales Manager View’ for the new smart view tab, then click **Create Tabs**.



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’

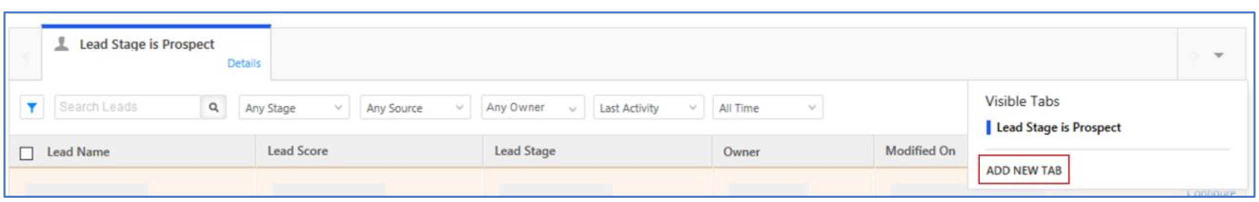


Step 4: When choosing the condition, select Lead Stage is Prospect and click on 'Add'. Once the criteria are added in the right column click on 'Set Criteria'



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**'

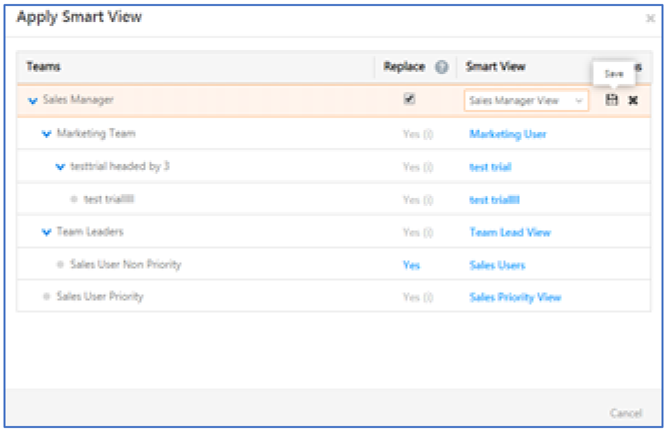


Step 7: Select the type as Task, name it as 'Pending Follow Up Tasks' and give the same description. Then select the task type as 'Follow Up' and the task view as 'list'

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.

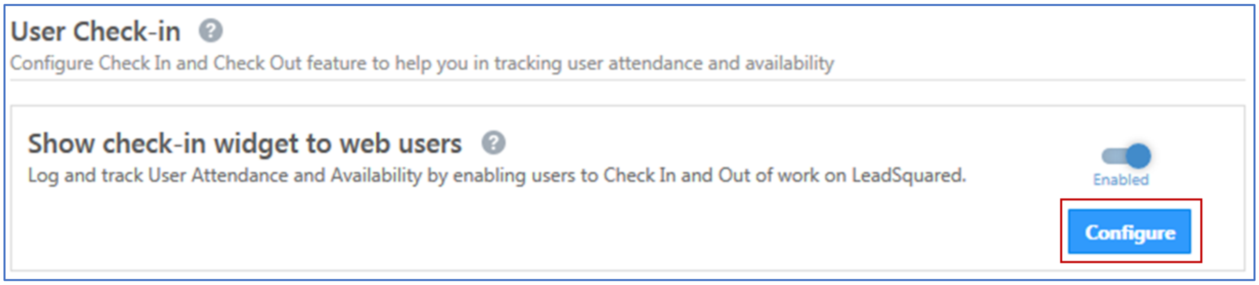
What's more, you can also distribute leads only to users who are available/checked-in to LeadSquared. It can be achieved using automations which we will cover later in the course

Hers how you configure the feature

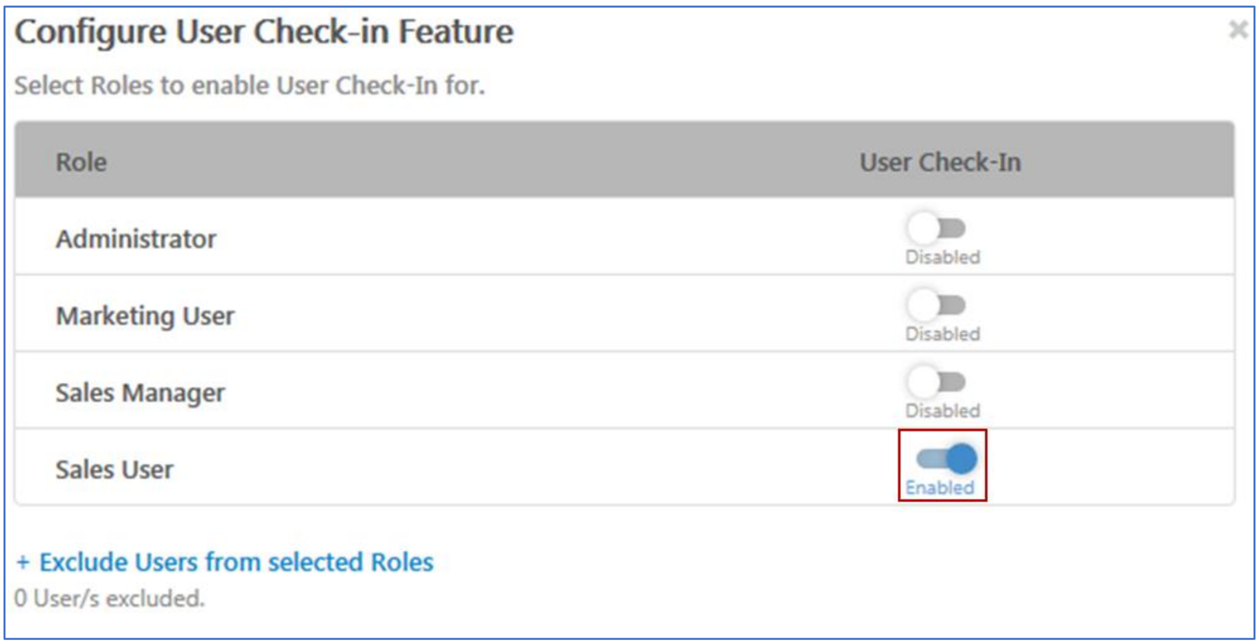
Step by Step: Configuring Check-in – Check-out

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.

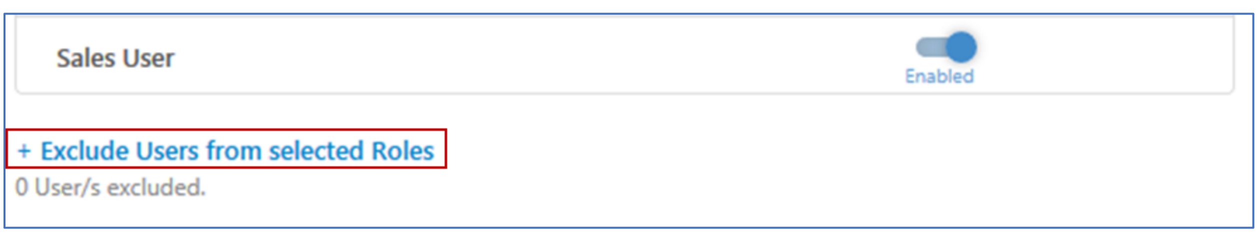
Step 2: Enable Check in and click on Configure button.



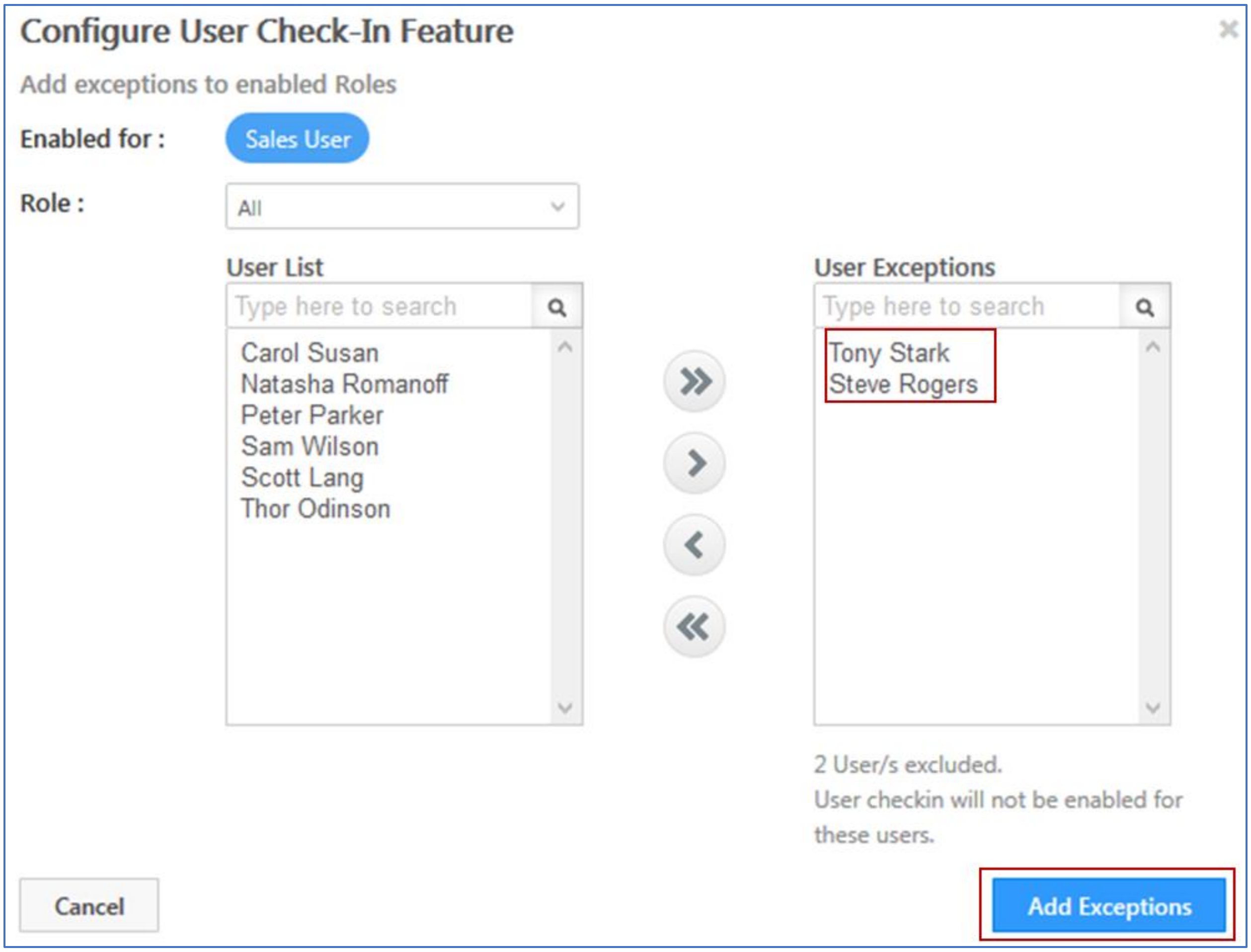
Step 3: In the pop-up, Enable User Check-in for Sales Users



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



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



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

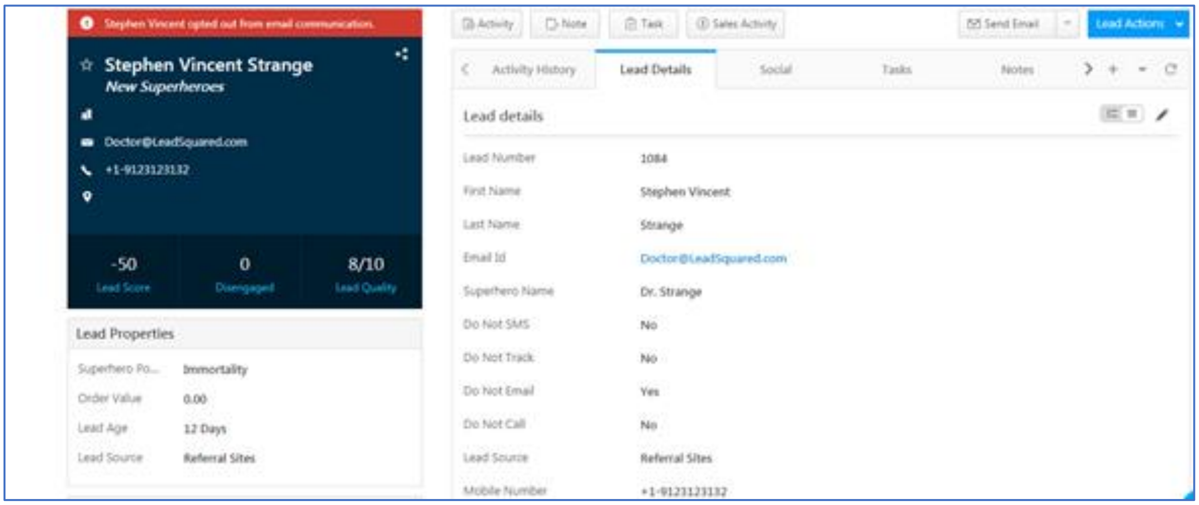
Next Steps:

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.



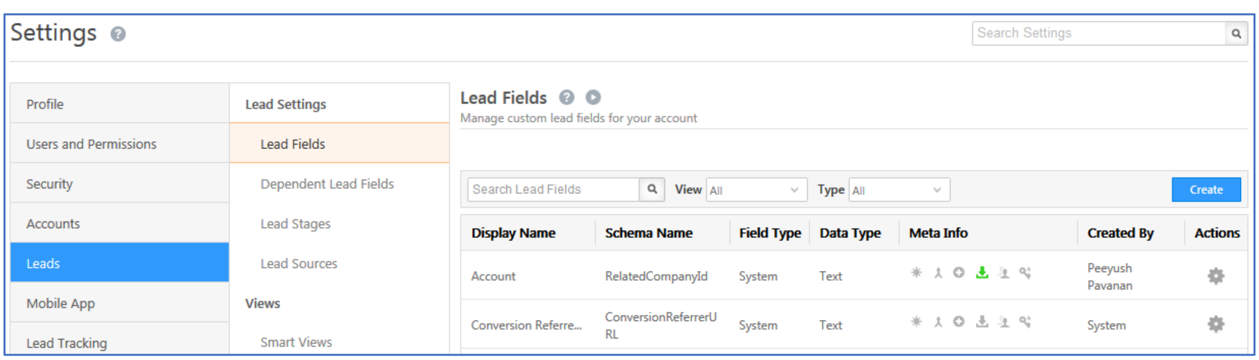
There are core lead fields comes with the LeadSquared application and custom fields which are generally created business to business by the admins during the customization to meet the business requirement.

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.

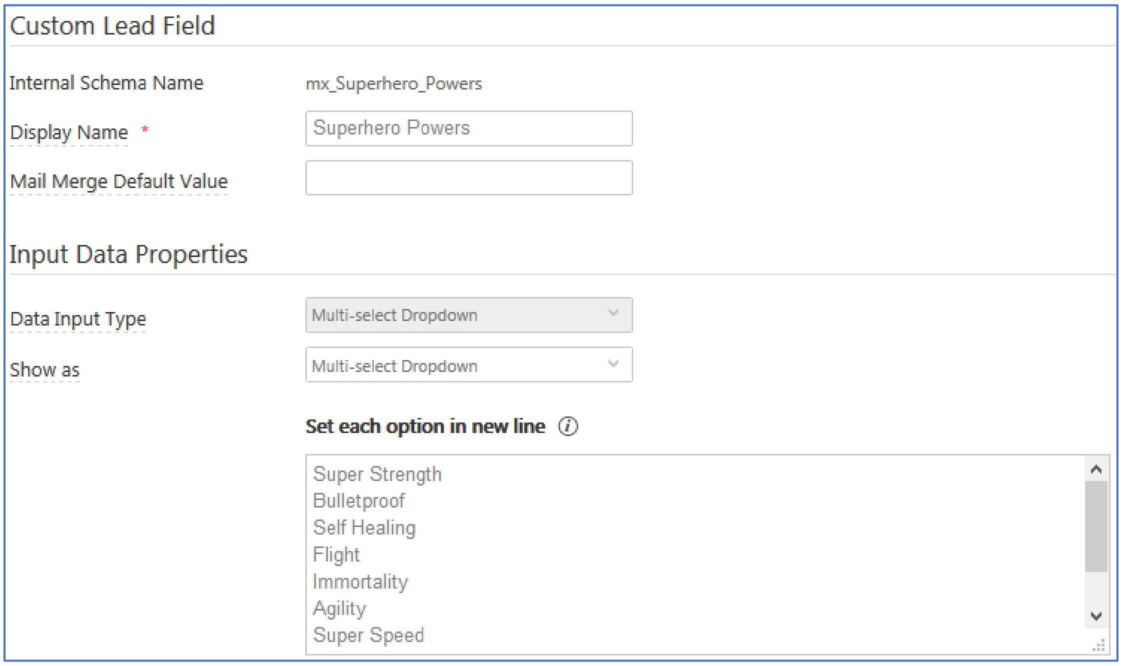
Step 1: Navigate to Lead Fields from Settings → Leads → Lead Fields

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



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.



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 *Quick Add Lead* option.
Show in Import	Selecting the check box will enable the user to map this field when importing lead information through the *Import Lead* 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.

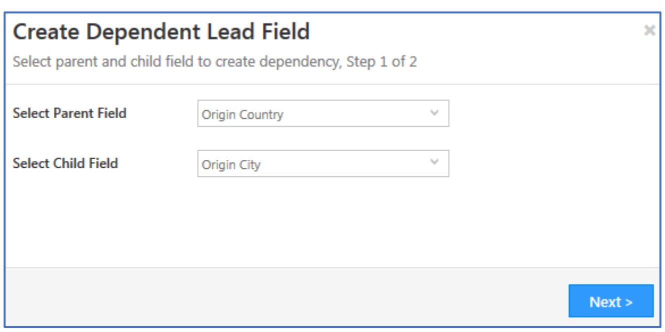
Step by Step: Creating Dependent Lead Fields

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

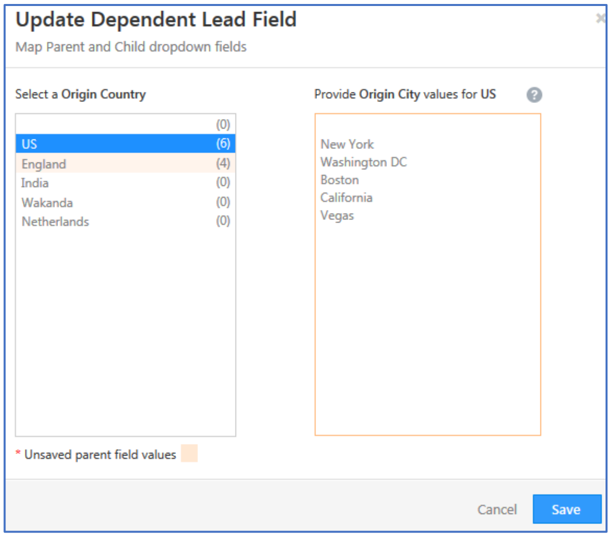
US	New York Washington DC Boston California Vegas
England	Chelsea Manchester London
India	Mumbai Delhi Bangalore
Wakanda	Birnin Zana
Netherlands	Amsterdam Rotterdam

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



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



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.

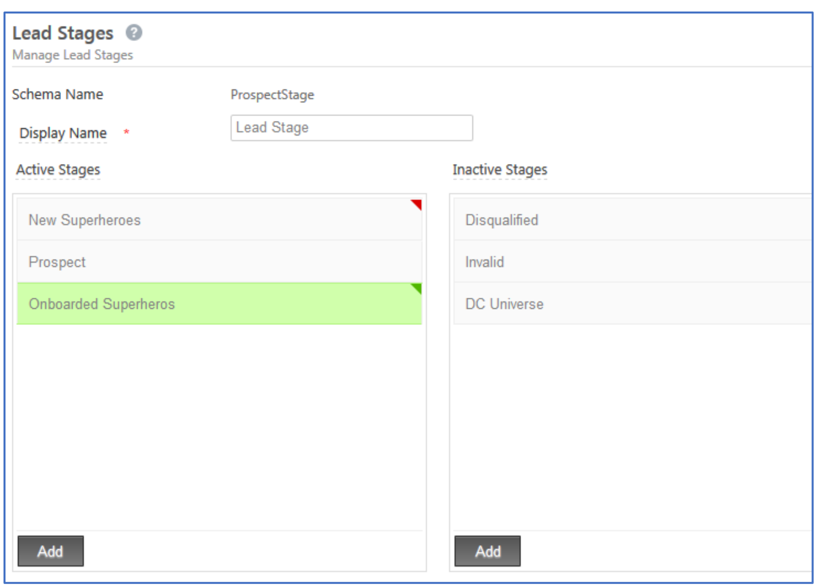
We will see the step wise procedure to add/ edit the different lead stages as per the business requirements.
For S.H.I.E.L.D. Insurance Ltd., will be creating the following active lead stages called 'New Superheroes' (default/the starting stage), 'Opportunity' and 'Onboarded Superheroes'' (last stage) 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.

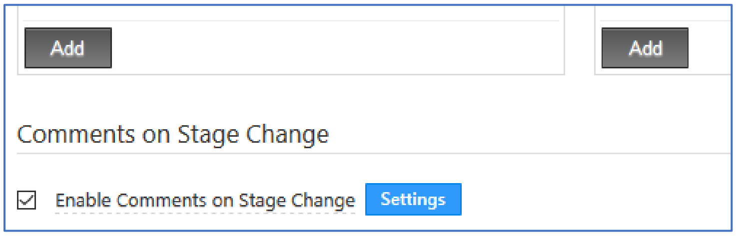
Step 2: Hover over the available stages to edit them, delete them or to change their respective orders or click on 'Add' to add more stages. Delete all the existing active stages except Opportunity and Customer (you cannot delete the final stage but only rename it.)
We need 'New Superheroes' as our default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



Step by Step: Configure Comments on Stage Change

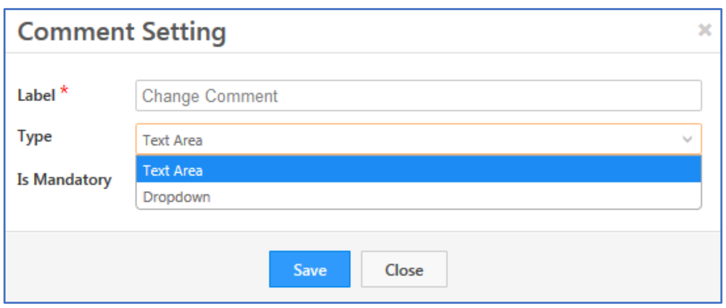
Comments on Stage Change will enable Users to add a Note/Reason while changing the Lead's Stage in your Sales/Marketing Funnel

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.

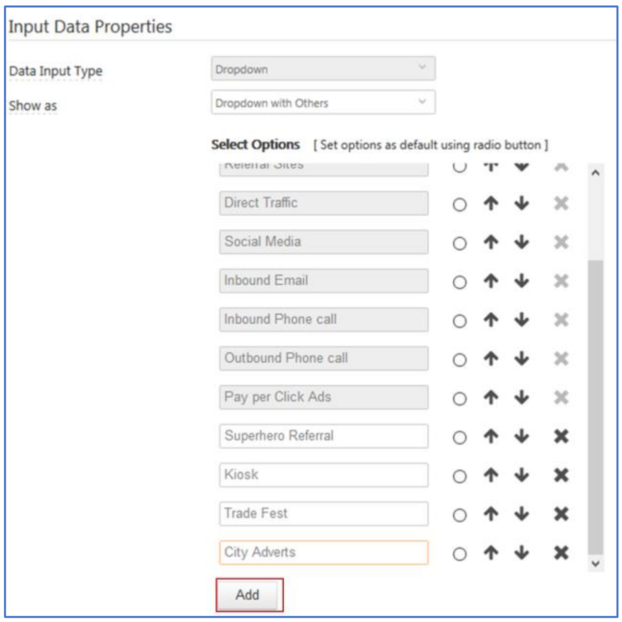
Step by Step: Creating Lead Souces

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'.



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.

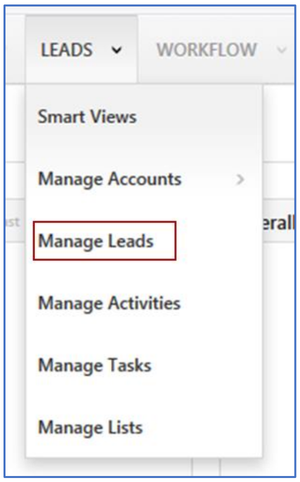
Chapter 7: Manage Leads, Import Leads and Manage Lists

Import leads

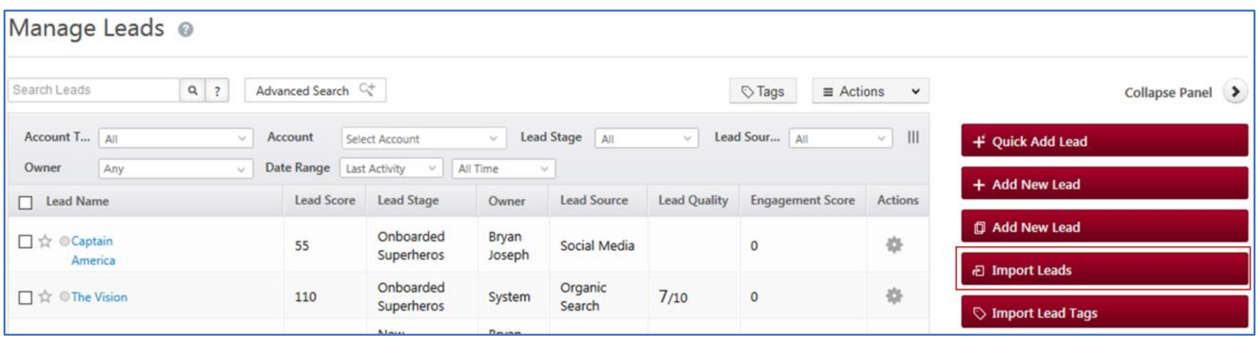
The Import Leads button allows the end user to import the leads from the CSV files to LeadSquared. This functionality comes handy if you must bulk import or update the Leads.

Step by Step: Importing Leads to LeadSquared

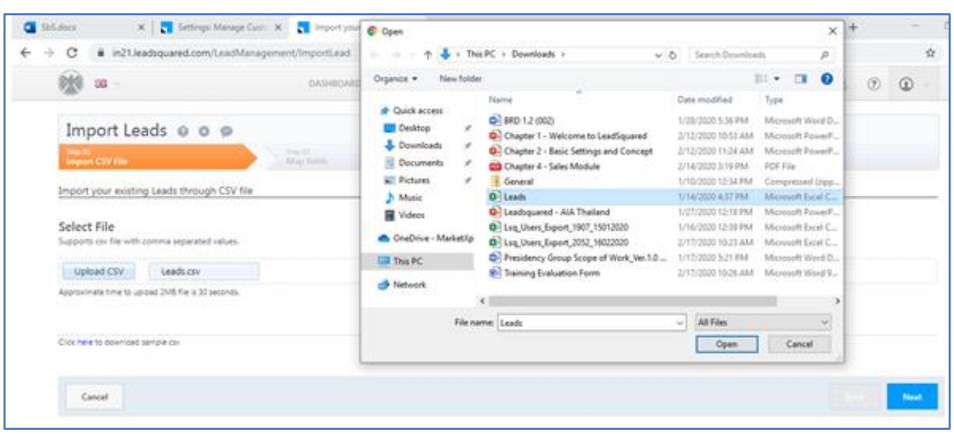
Step 1: On the top bar hover around Leads and from the dropdown select ‘Manage Leads’.



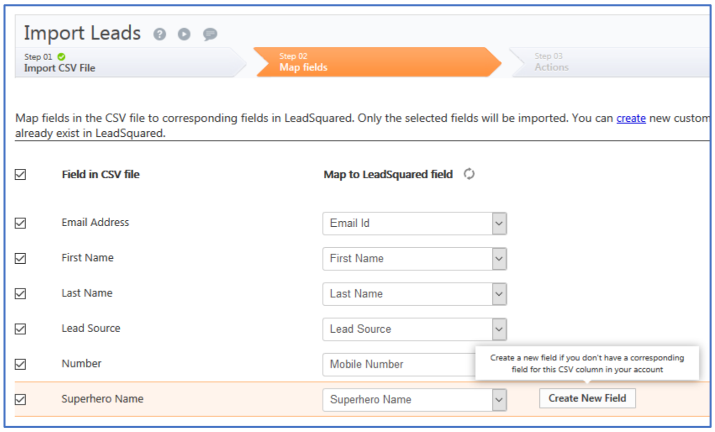
Step 2: On the Manage Lead page, click on Import Leads



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	If you select this option, the CSV file data will overwrite the data in your LeadSquared account. The following checkboxes will also be available for selection • Import only if valid email exists in CSV • Do not update owner of existing leads • Do not create new leads – this will ensure leads are only updated and no new leads are created.
Update empty fields of duplicates	With this option, only empty fields of the duplicate records in LeadSquared will be updated with the data in the CSV file.

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

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

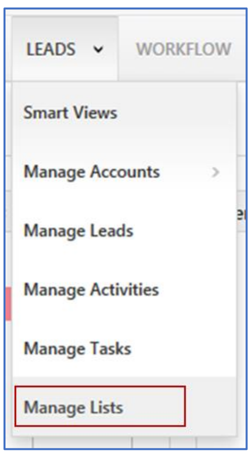
Static List has fixed number of Leads. The list can only be changed by manually deleting, adding or importing Leads.

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.

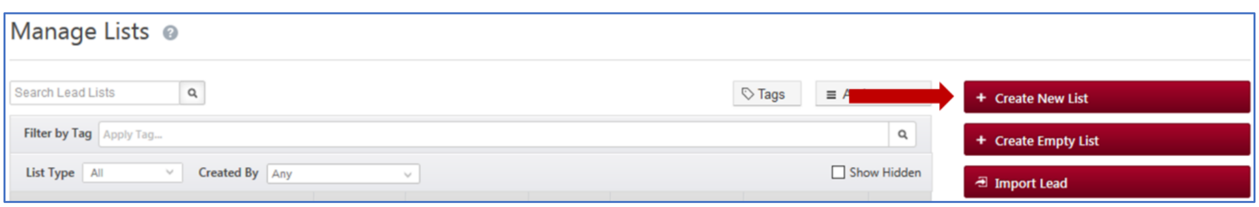
Let us create a dynamic list to capture all the leads whose lead stage is 'New Superheroes'.

Step by Step: Creating Lead List

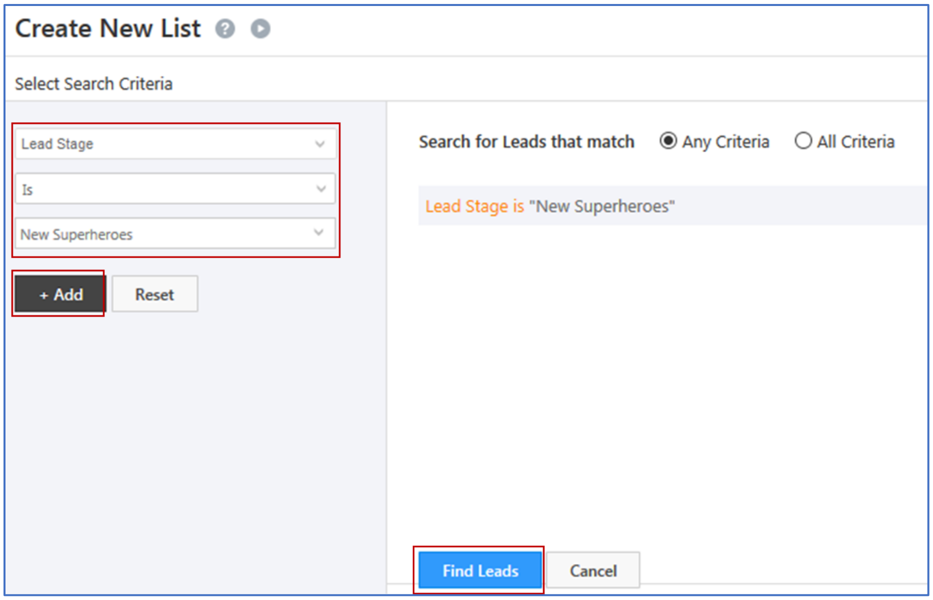
Step 1: Hover on 'Leads' in the top bar, select 'Manage Lists' from the dropdown.



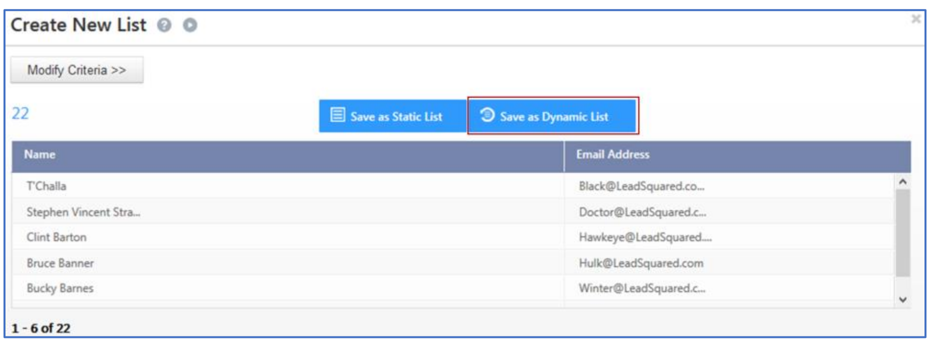
Step 2: Click on 'Create New List' to create one from scratch. You can also access the different lists created from here.



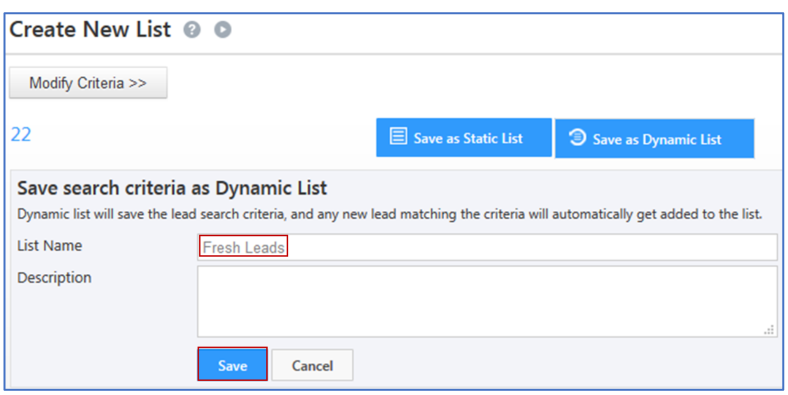
Step 3: Define the condition as "Lead stage is 'New Superheroes'", then click on 'Find Leads'.



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



Step 5: Provide List name: "Fresh Leads". Click on 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.

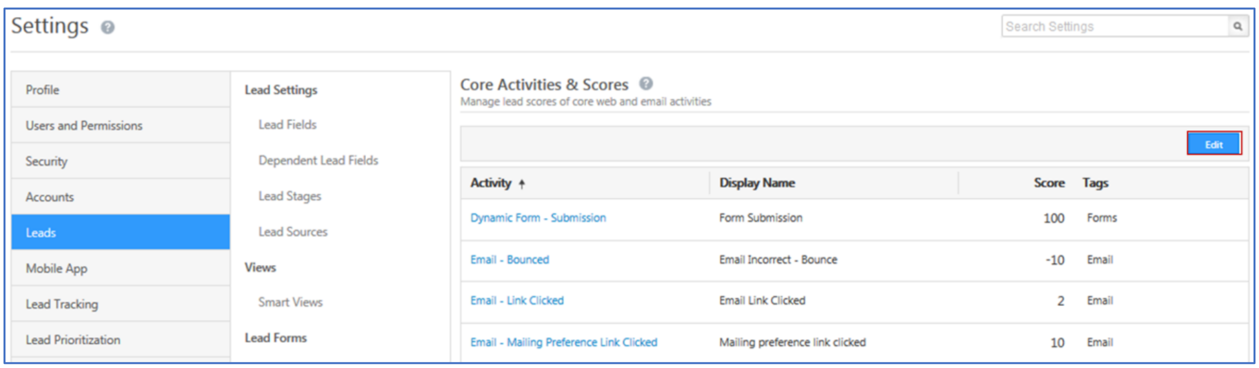
Core Activity

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

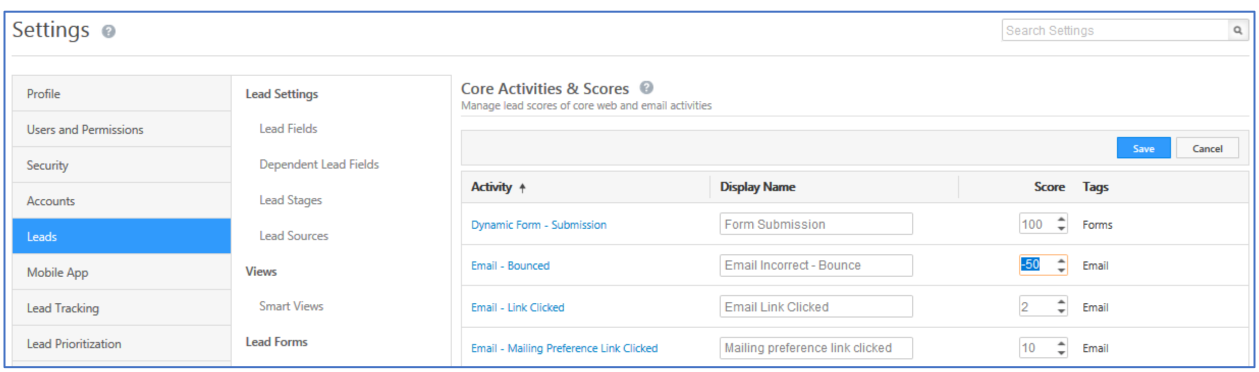
Step by Step: Customizing Core Activity

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

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



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



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)	

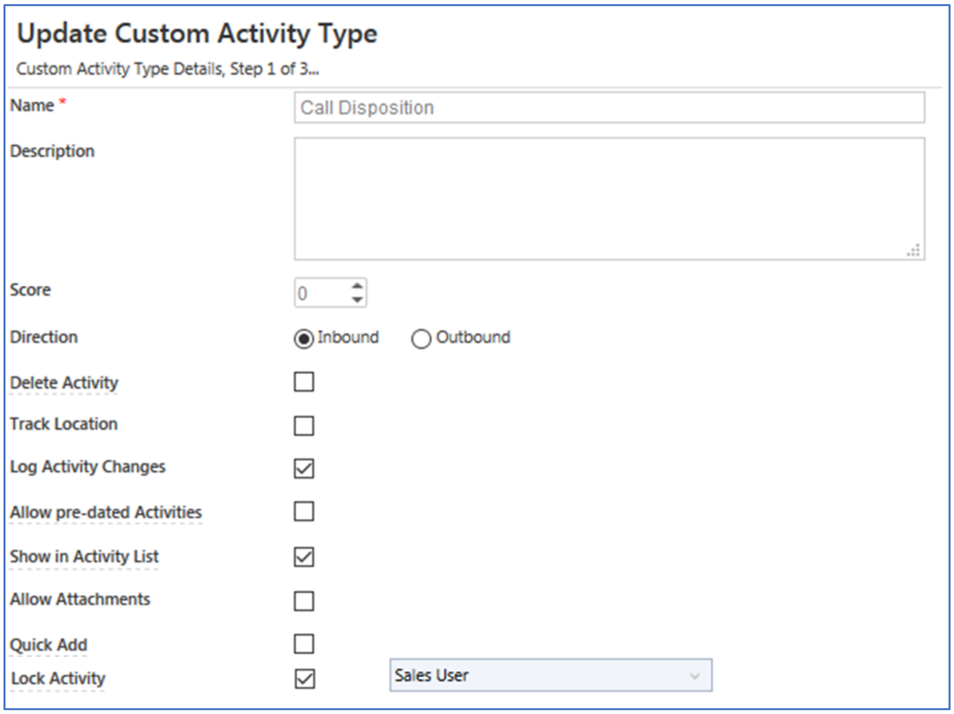
'Sub Disposition'(dropdown), make it a dependent dropdown with the following information. Parent field for Sub Disposition will be Disposition.

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'

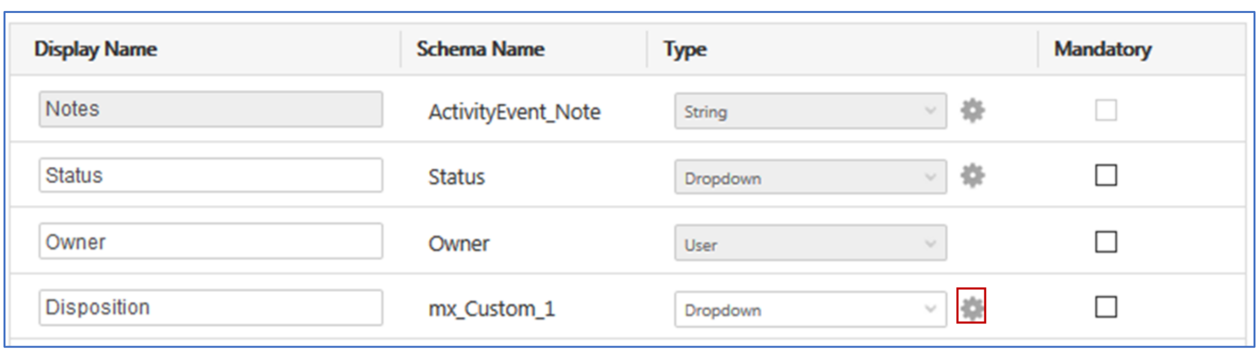
Step 3: Give the name 'Call Disposition'. Leave the score as blank. Tick the checkboxes for 'Log Activity Changes', 'Show in Activity List', 'Lock Activity' and lock it for the Sales Users.



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'.

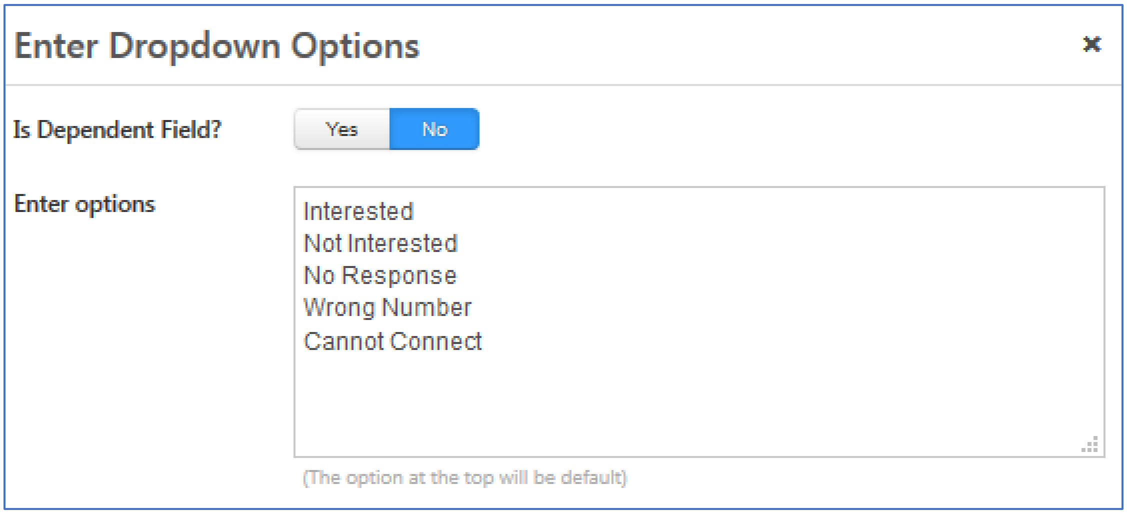
Step 6: Add a custom field 'Disposition' and keep the data type as Dropdown. Click on the gear icon next to it to add the values.



Display Name	Schema Name	Type	Mandatory
Notes	ActivityEvent_Note	String	
Status	Status	Dropdown	
Owner	Owner	User	
Disposition	mx_Custom_1	Dropdown	

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

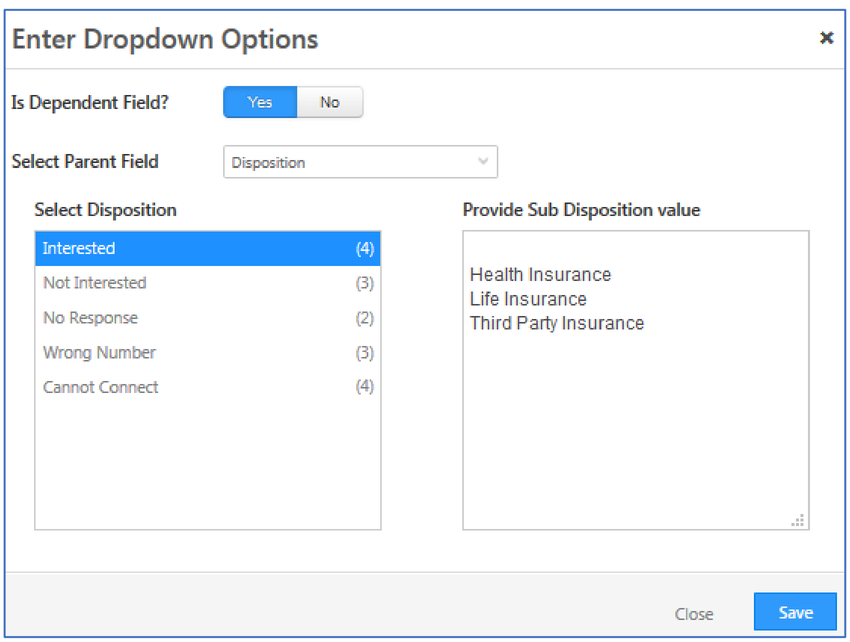
1. Interested
2. Not Interested
3. No Response
4. Wrong Number
5. Cannot Connect



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.

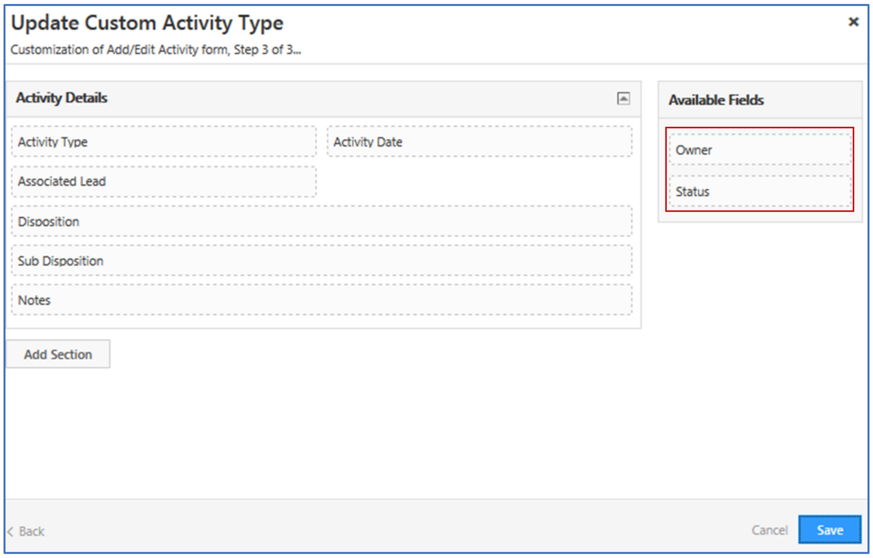
Step 10: Keep it as a dependent field and tell the system that the parent field is 'Disposition'. Add the values given in the requirement shared above for each value as shown.



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.

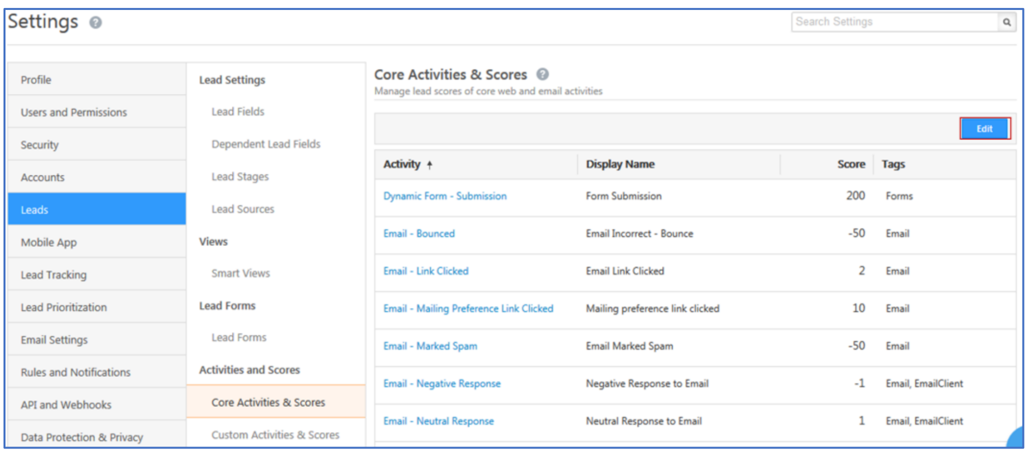
Lead score is the measure of Lead activity in response to your marketing offers. An engaged Lead interacts with you online or offline. These interactions are essentially Lead activities with varied level of importance.

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

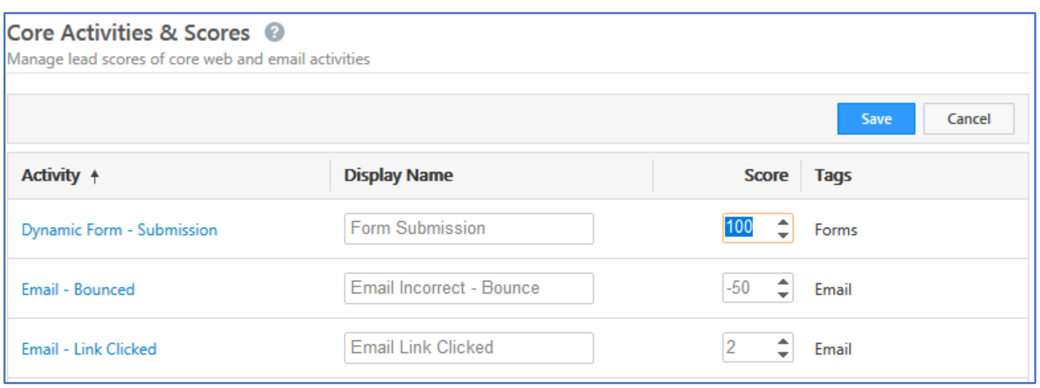
Step by Step: Defining Lead Score

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



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



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.

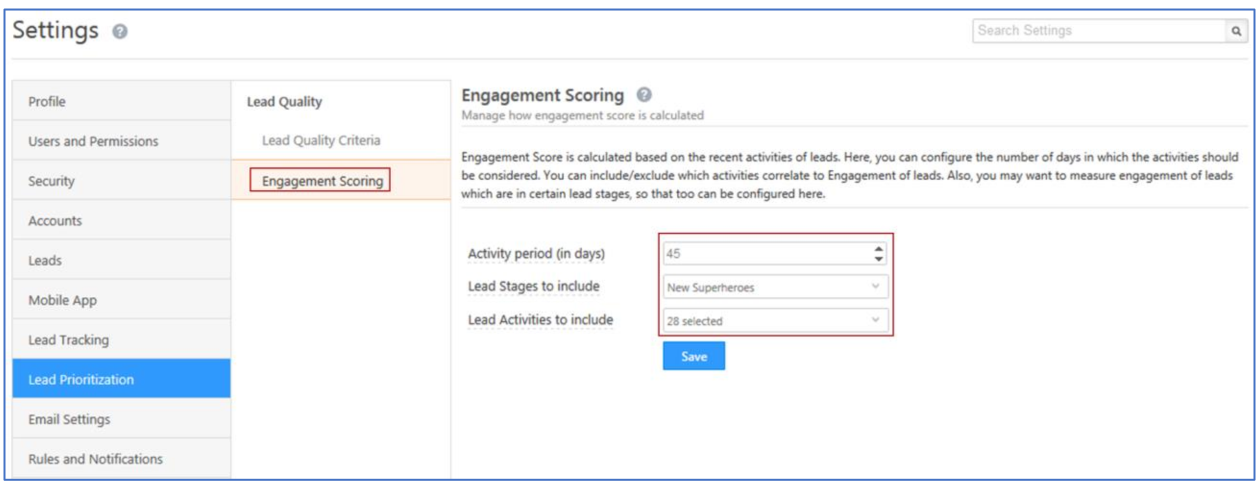
Step by Step: Configuring Engagement Scoring

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.



Step 5: Click on Save

Lead Quality Criteria

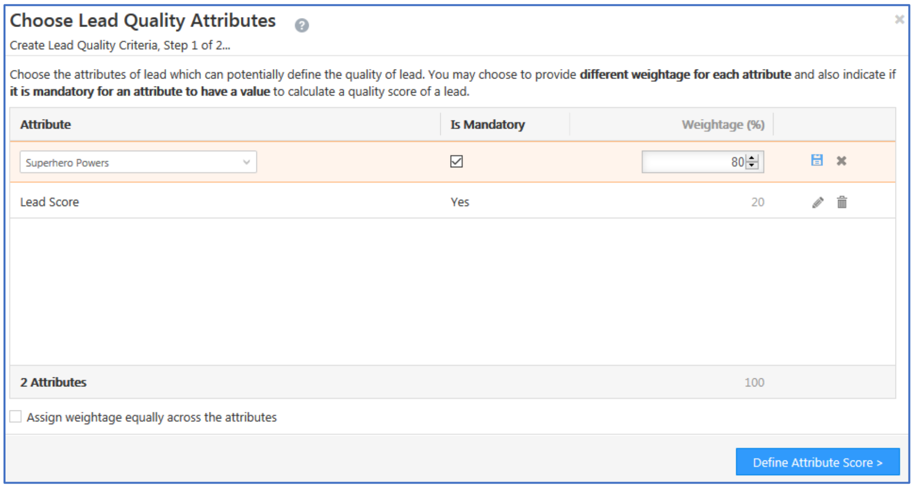
Lead Quality Criteria helps you to set rules to identify high quality leads. Leads are evaluated against these rules and assigned a score. This score can be used to filter leads that are best suited for carrying out sales activities.

Step by Step: Configuring Lead Quality Score

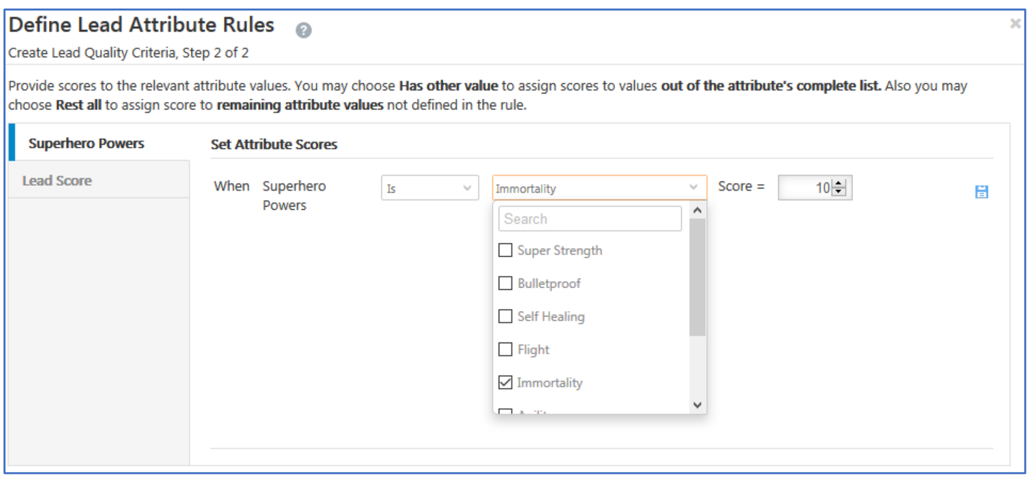
Step 1: To setup Lead Quality, navigate to: Settings → Lead Prioritization → Lead Quality Criteria and click on Create

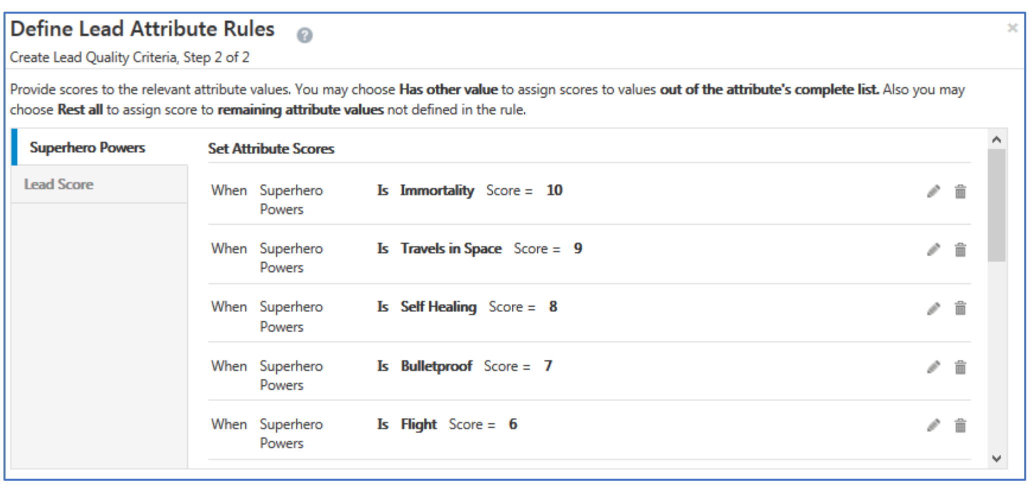
Step 2: Once there select the attributes on which you want the system to calculate. For our exercise lets choose Superhero Powers and Lead score.

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.

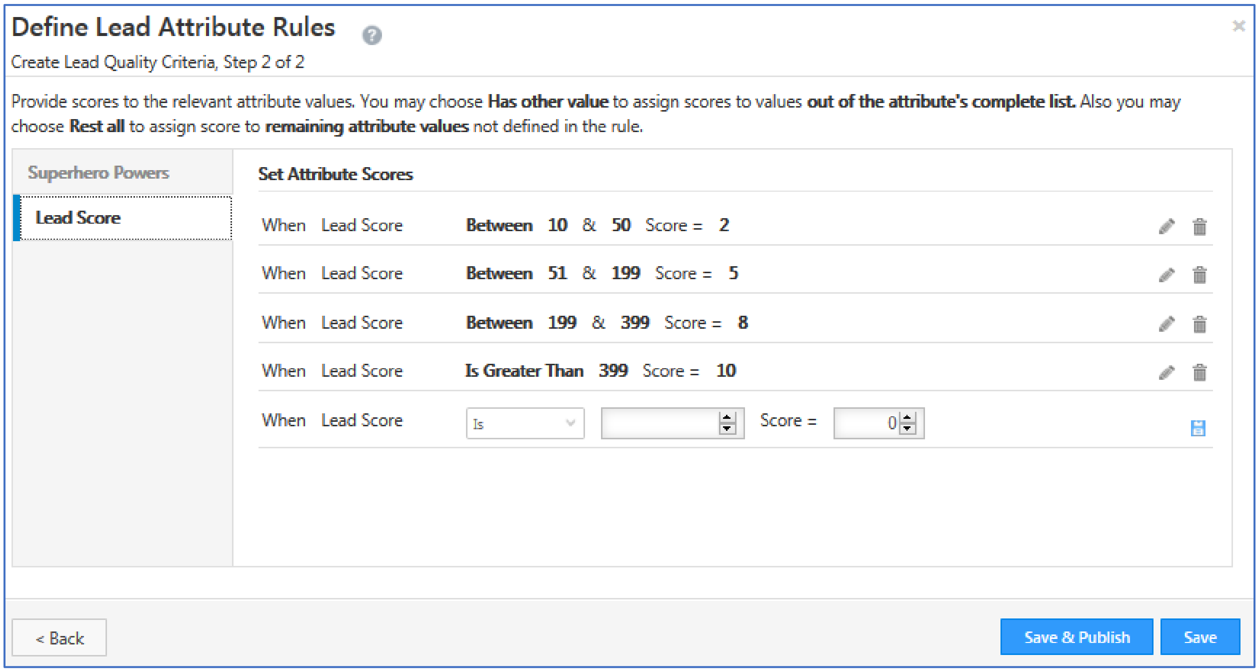


Step 4: Click on Define Attribute Score button and set the attribute score for Superhero Powers, by weighing the highest to lowest among the given powers. See the screenshot given below to assign scores for Superhero Powers





Step 5: Set the scores for Lead Score attribute.



Step 6: Click on Save & Publish.

Chapter 10: Custom Field Sets

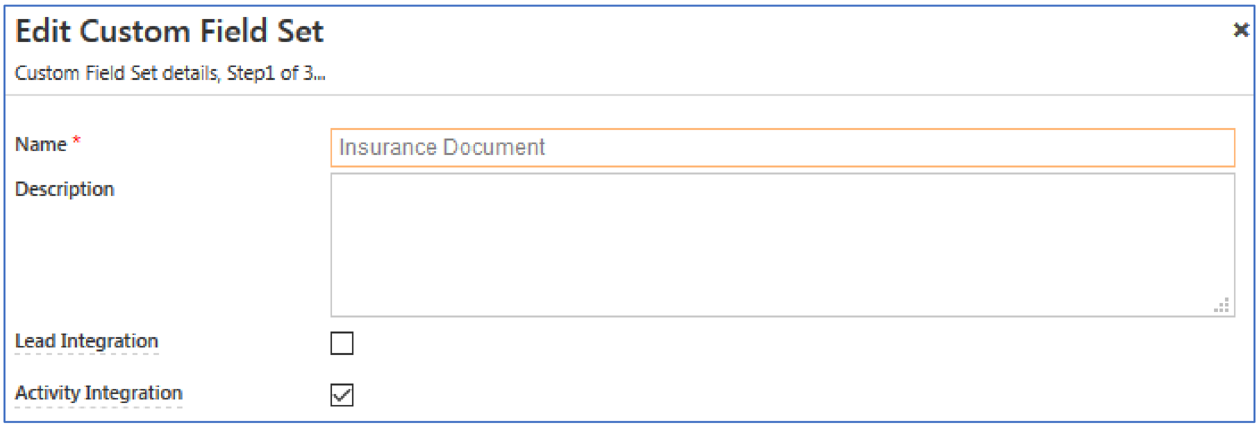
A custom field set is a group of fields that can be used as a field type in an activity or on a lead.

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

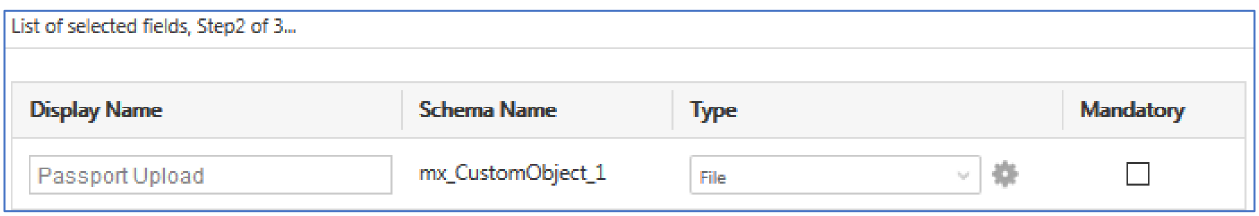
Step by Step: Creating Custom Field Set

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

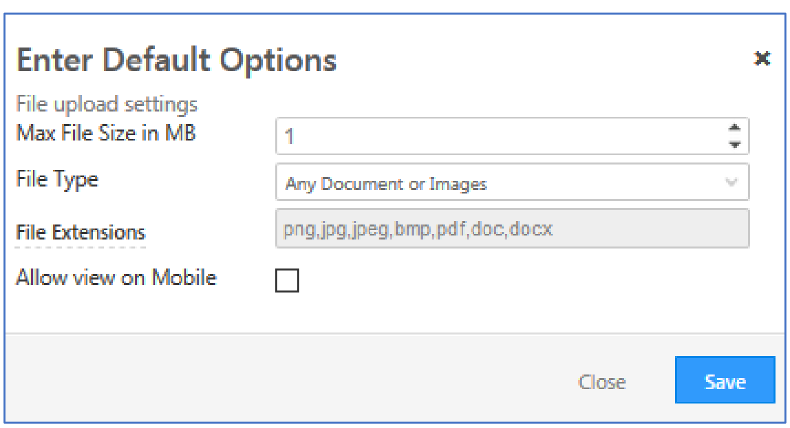
Step 2: Name it 'Insurance Document' and check 'Activity Integration' because we will be mapping this field set to an activity 'Document Collection'. Click on Next.



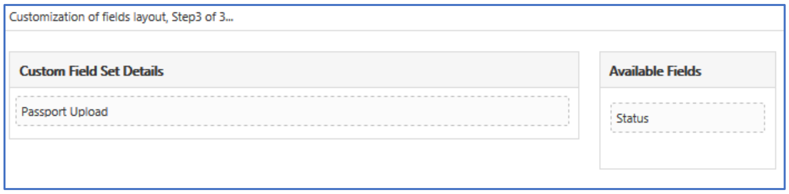
Step 3: Add the field 'Passport Upload' and select the data type as 'file'.



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'



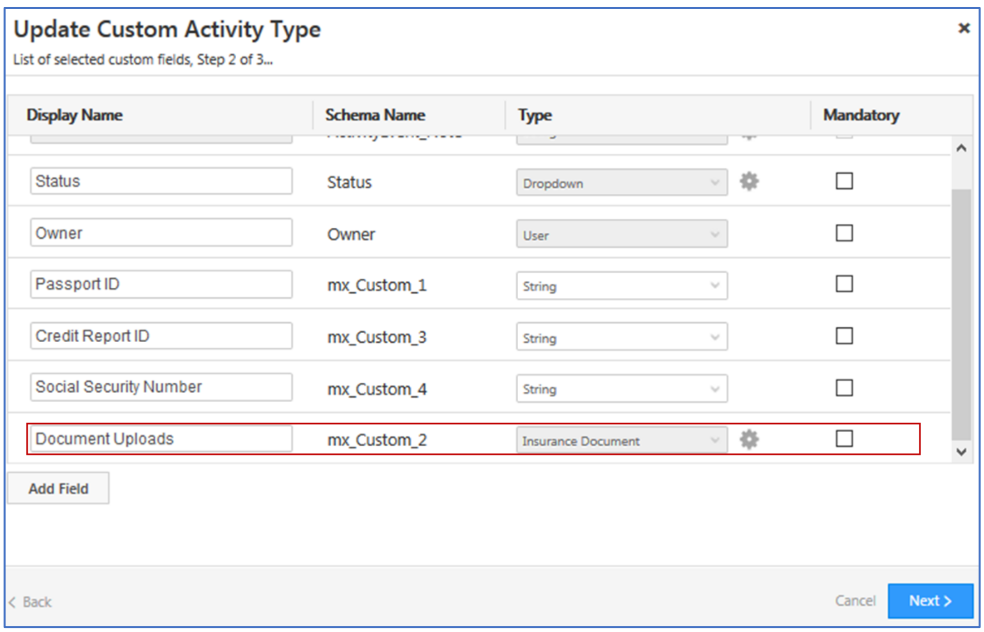
Step 5: Define the fields that will be displayed to the end user. Remove Status field to Available Fields.



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'.



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

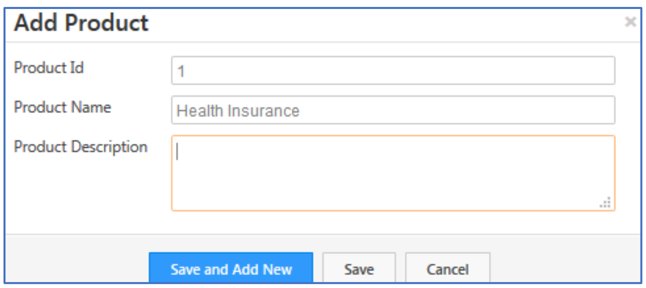
1. Health Insurance
1. Life Insurance
2. Third Party Insurance

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

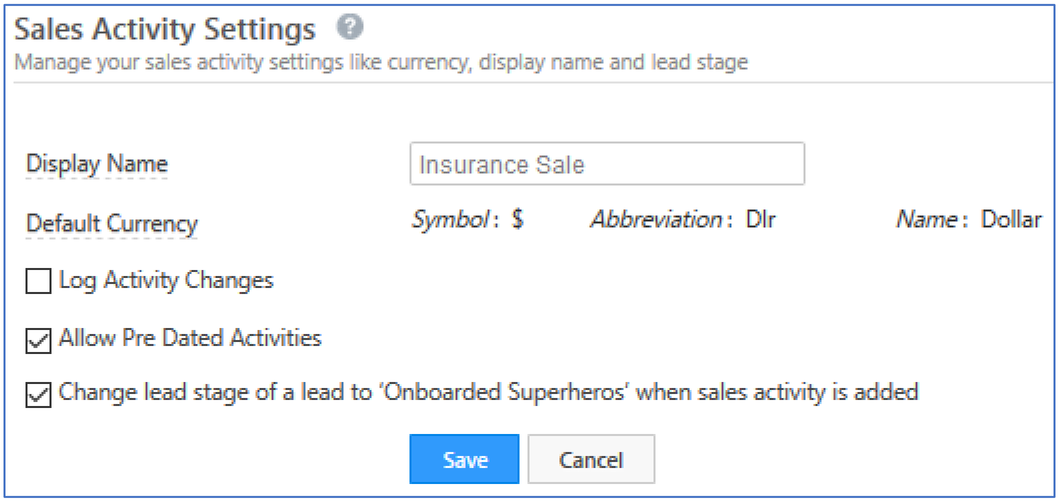
Step 5: Click on 'Edit' to add custom fields for the Sales Activity:

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'.



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

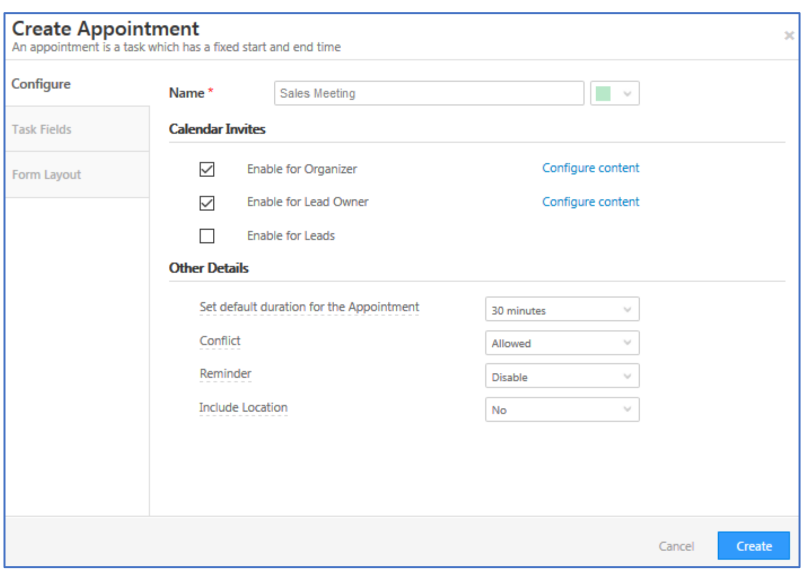
To the user all the task fields must be visible except for the task field 'Priority'.

Step by Step: Creating Appointment task type

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

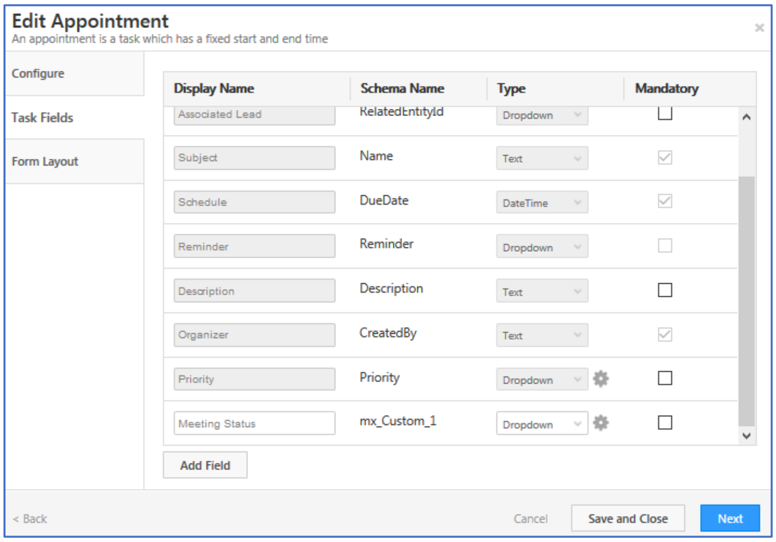
Step 2: Put the Name as 'Sales Meeting' and enable Calendar Invites for

1. Organizer
2. Lead Owner



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.



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

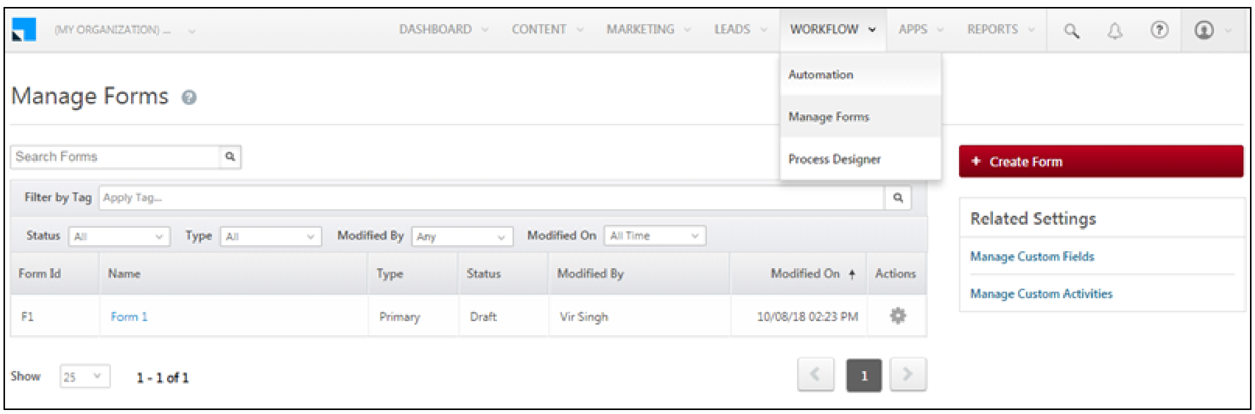
The Forms and Process Designer features help your users create intelligent forms to capture lead data that's relevant to their departments, products, or processes.

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.

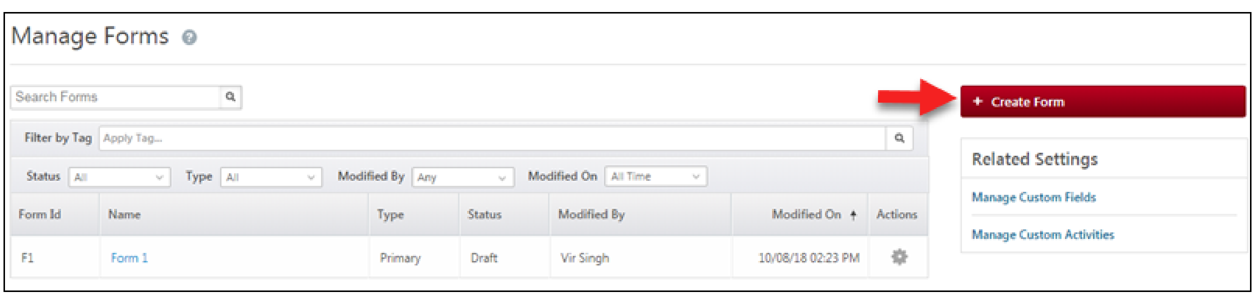
As per S.H.I.E.L.D Insurance Ltd., they would like to replace the existing activity forms of Document Collection with dynamic forms having both Lead Fields and Document Collection Activity fields. In the below steps, you will be creating the dynamic form as per the requirement of our client, S.H.I.E.L.D.

Step by Step: Creating Dynamic Forms

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

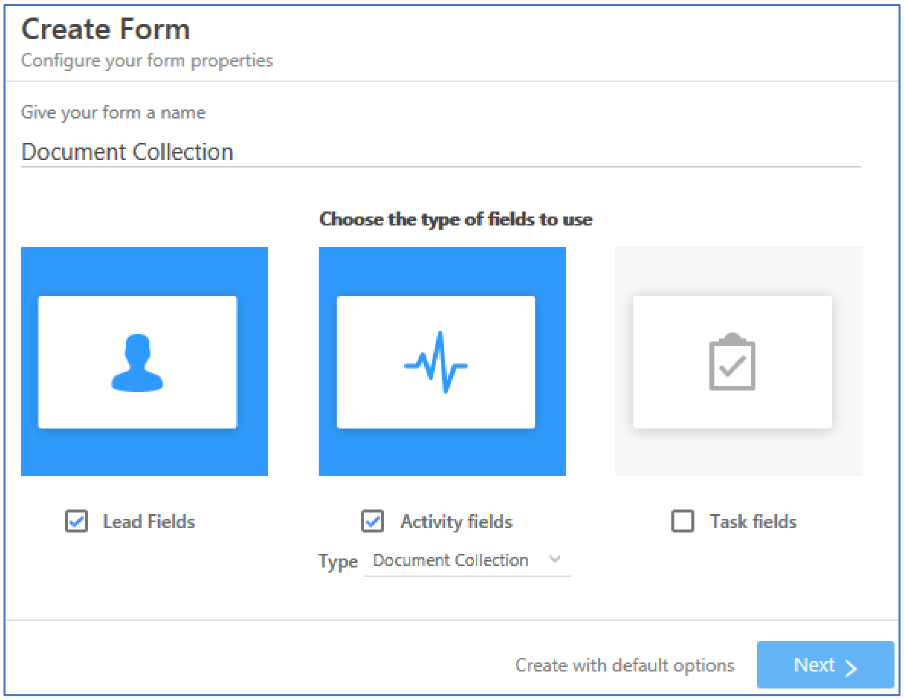


Step 2: Click on Create Form button to create a new form



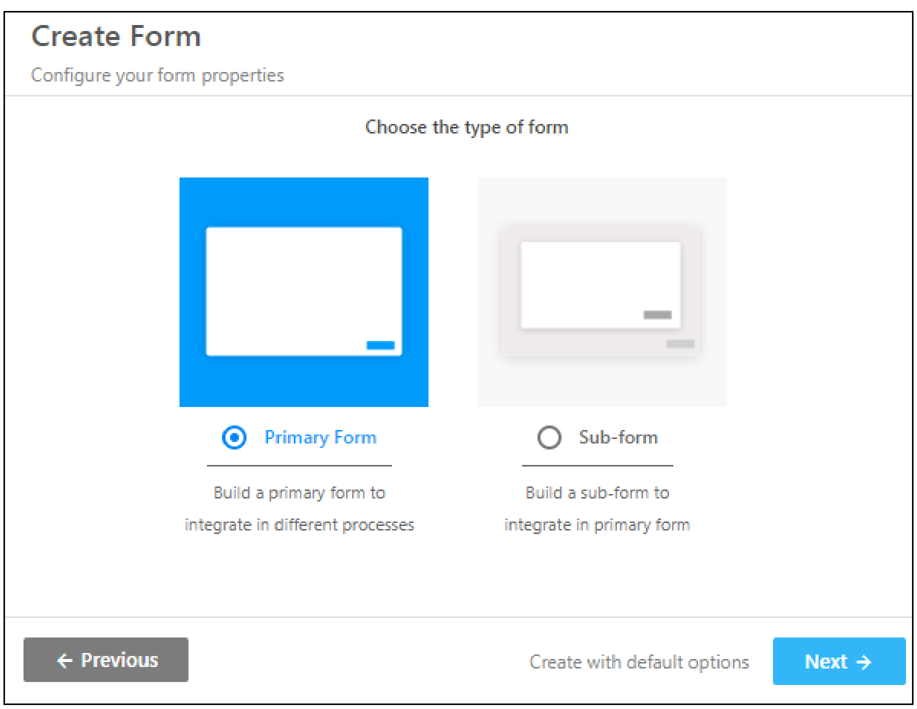
Step 3: On the Create Form pop-up:

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



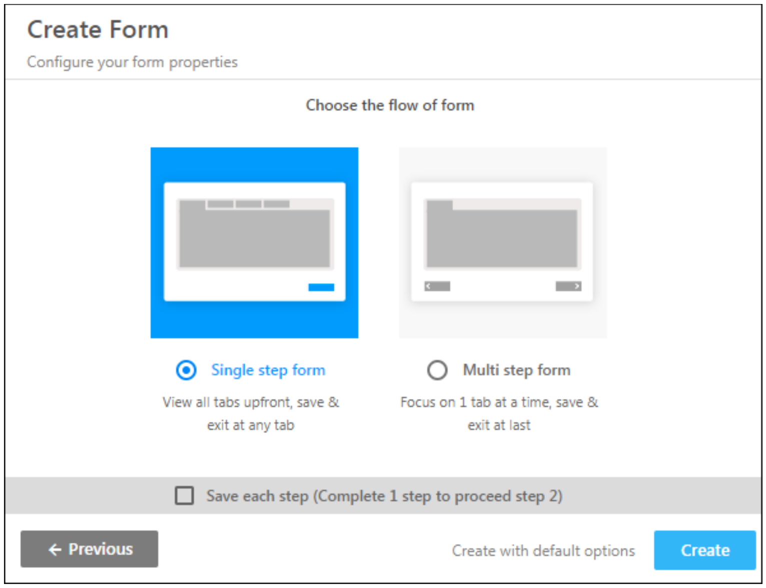
Step 4: Choose the type of form as Primary Form and click Next.

- **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.

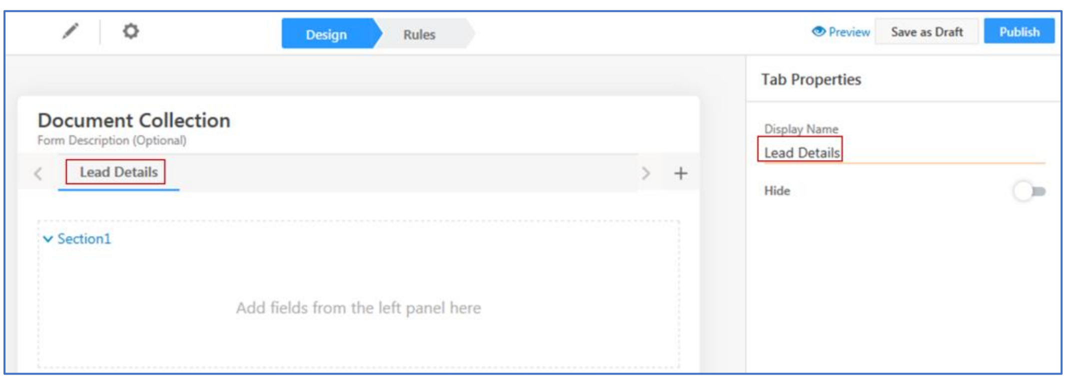


Step 5: Now choose form flow as Single step form and click on Create.

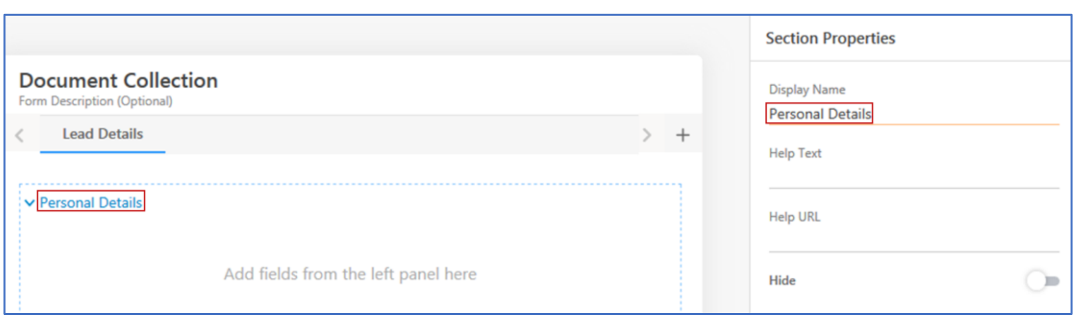
- **Single step form** – All tabs will be visible upfront. You can switch between tabs, and save & exit while on any tab.
- **Multi step form** – Users will only see one tab at a time. You can only save and exit the form at the last step.



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

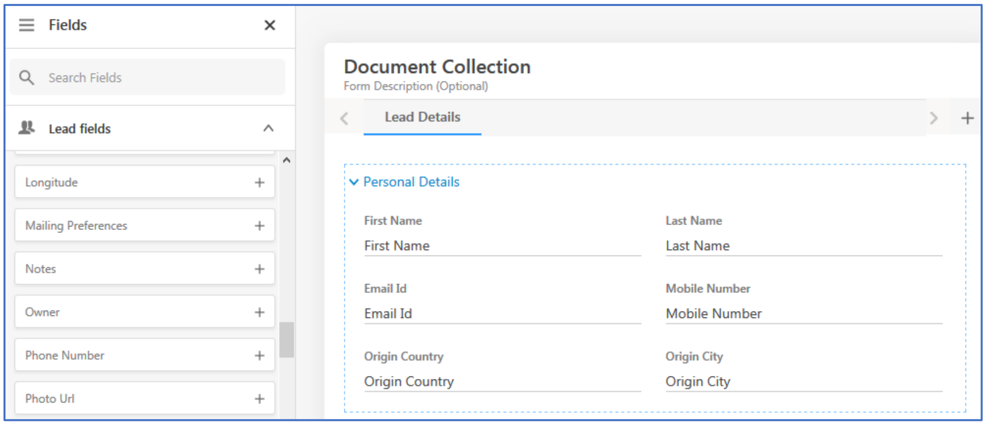


Step 5: Click on Section 1 and rename it as Personal Details

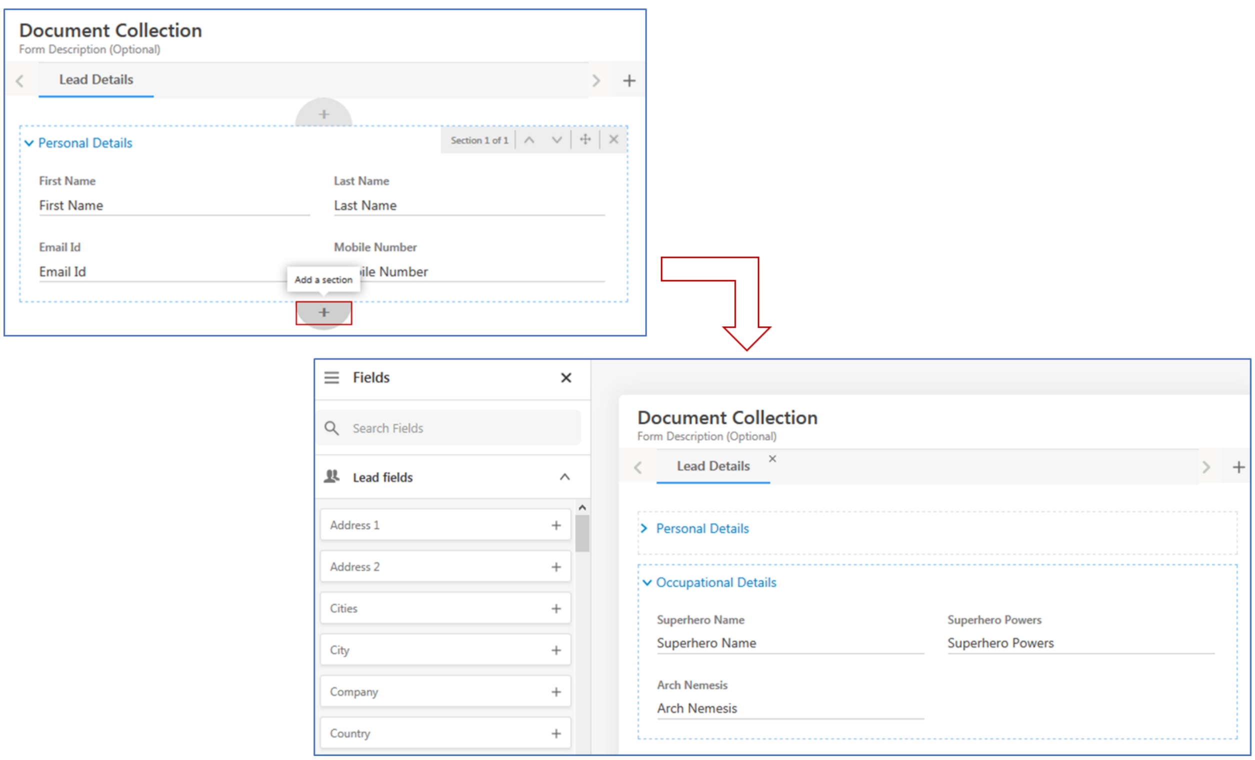


Step 6: Add following fields to Personal Details by clicking on + icon next to Lead Fields:

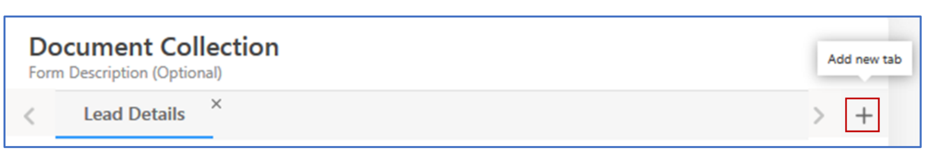
First Name, Last Name, Email ID, Mobile Number, Origin Country and Origin City



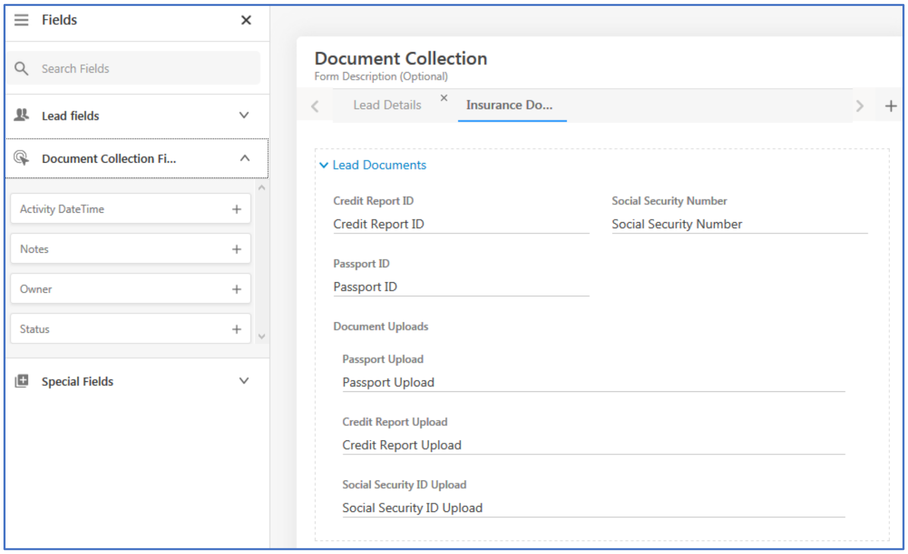
Step 7: Add another section to Lead Details tab by hovering over Personal Details section and click on + as displayed in the screenshot. Rename the Section as Occupational Details and add the following fields to it: Superhero Name, Superhero Powers and Arch Nemesis



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



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.

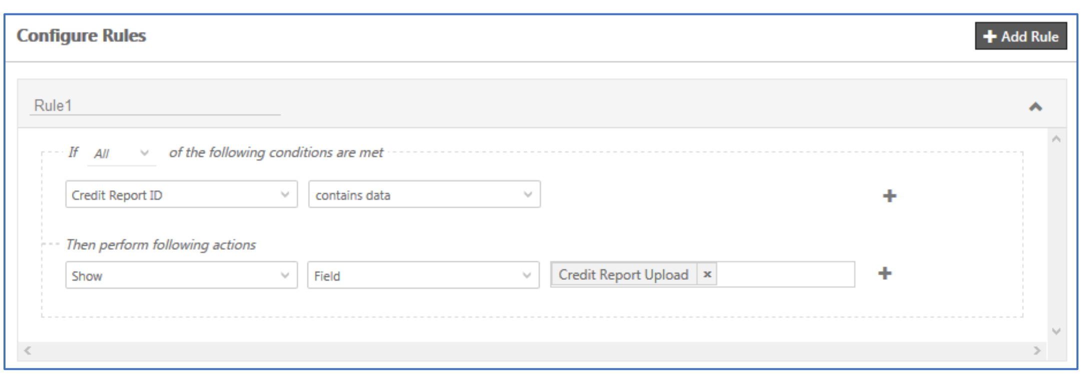


Step 10: Define the rules. As we have all the fields needed in the form, we will now be defining rules for the dynamic forms. As per S.H.I.E.L.D. Insurance firm, they would like to see the Passport Upload option only if the Passport ID field has the data. Likewise, Credit Report Upload and Social Security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

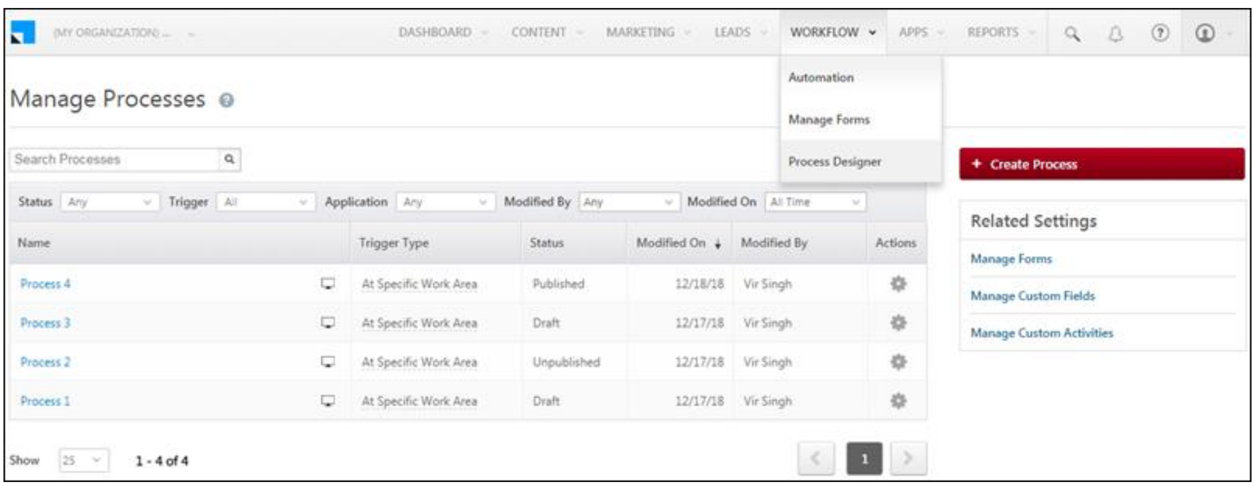
The process designer lets you organize your forms into workflows. You can create workflows for any business process such as loan/insurance application, KYC collection, education applications, medical applications, etc.

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

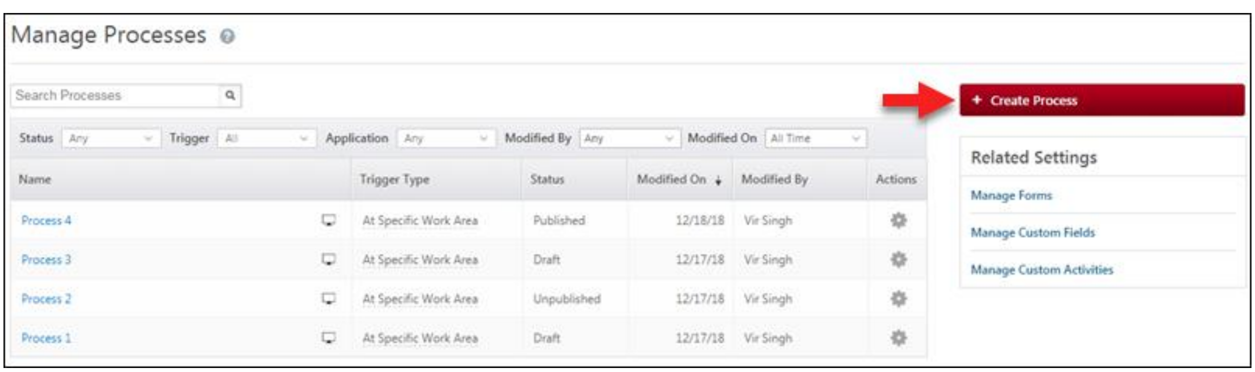
1. Choose the work area (Manage Forms page, Manage Activities page, Smart Views, etc.) where you want to display your forms.
2. Set conditions on users (show forms to particular teams, roles, sales groups, etc.) and form field values.
3. Chain together multiple forms to create processes.

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.

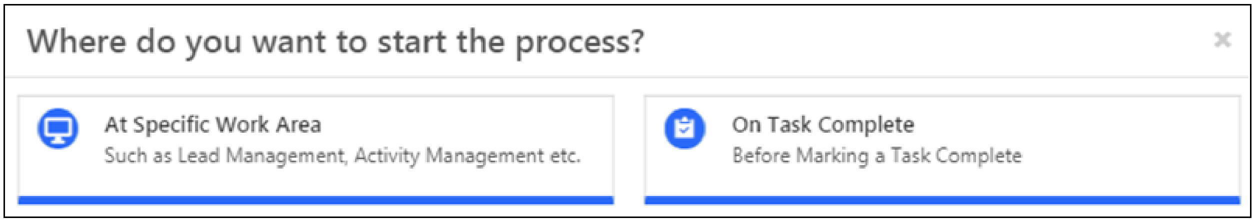


Step 2: Click the Create Process button to create a new process.



Step 3: Choose the trigger point:

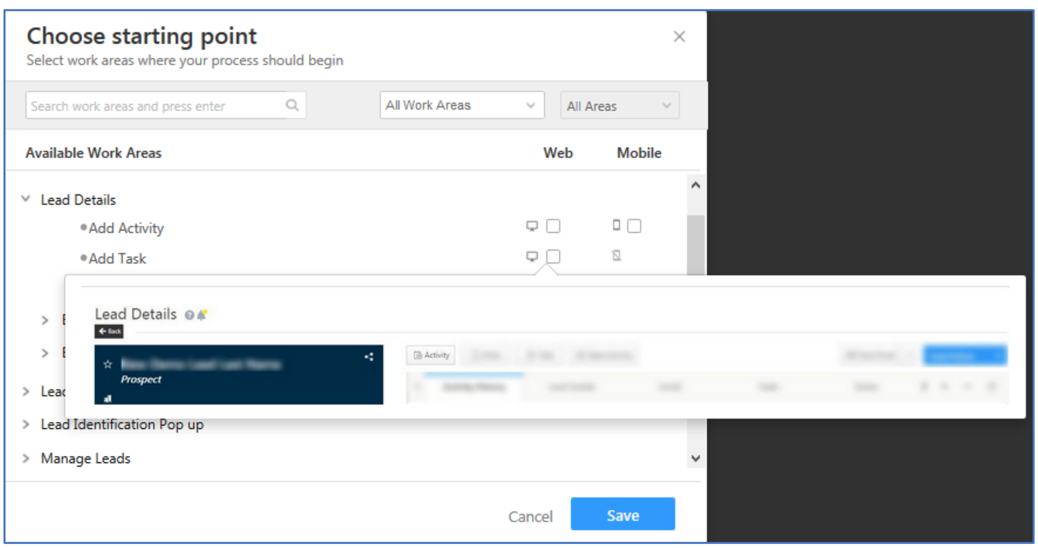
- **At Specific Work Area**
  This option lets you create a button on a specific page (Manage Leads, Lead Details, etc.) to trigger the process.
- **On Task Complete**
  The process will be triggered before a user marks a task complete.



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.



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

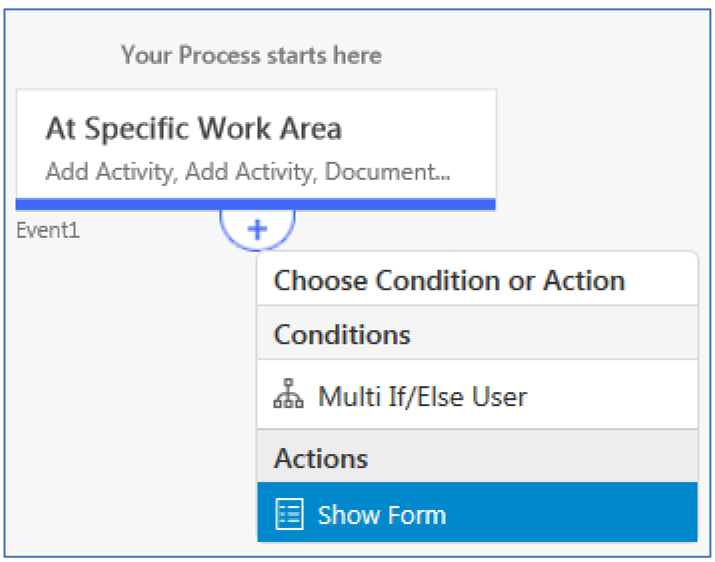
Add Activity	Both Web and Mobile

Under Manage Leads

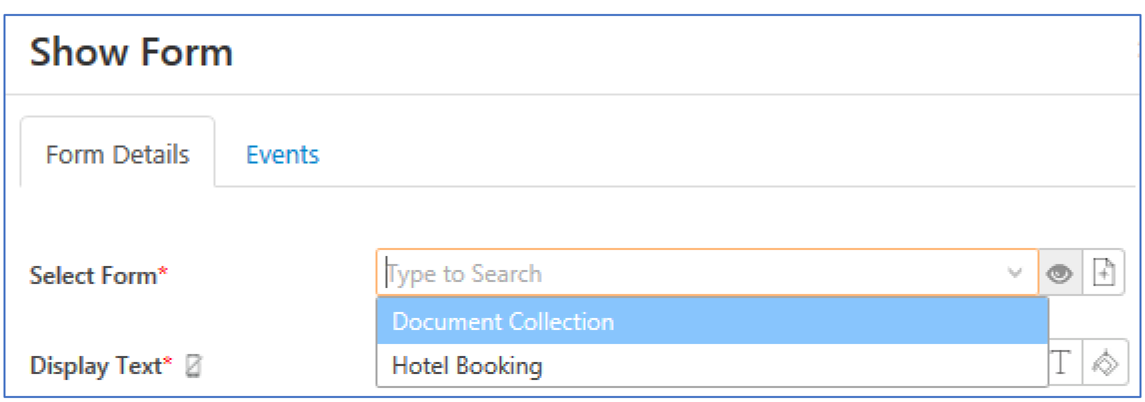
Add New Lead	Both Web and Mobile

Step 5: Click on Save

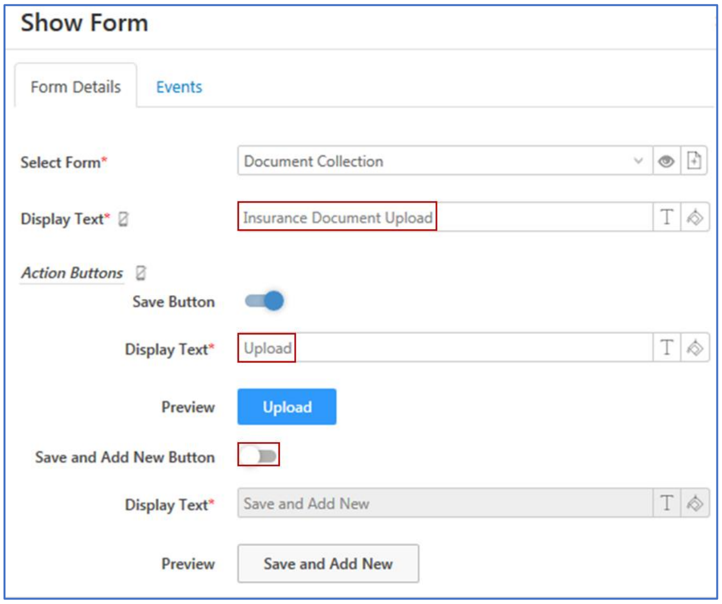
Step 6: Click on + icon under At Specific Work Area card and select Show Form



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

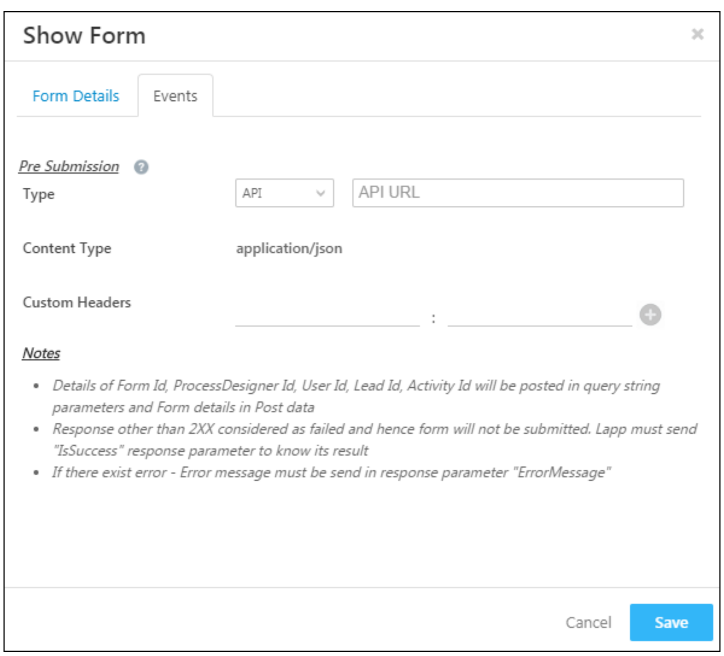


Step 8: Replace the Display Text of the form with Insurance Document Upload and Display Text for Save button with Upload. Also, keep Save and Add New Button as disabled



The 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”}*



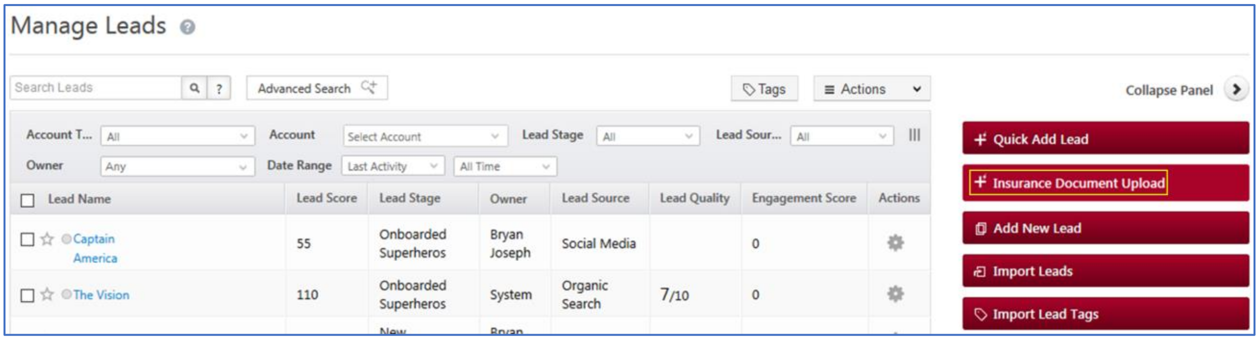
We can leave the Events section for our process blank since, we are not validating any fields neither have a Lapp created for the same.

Step 9: Click on Save.

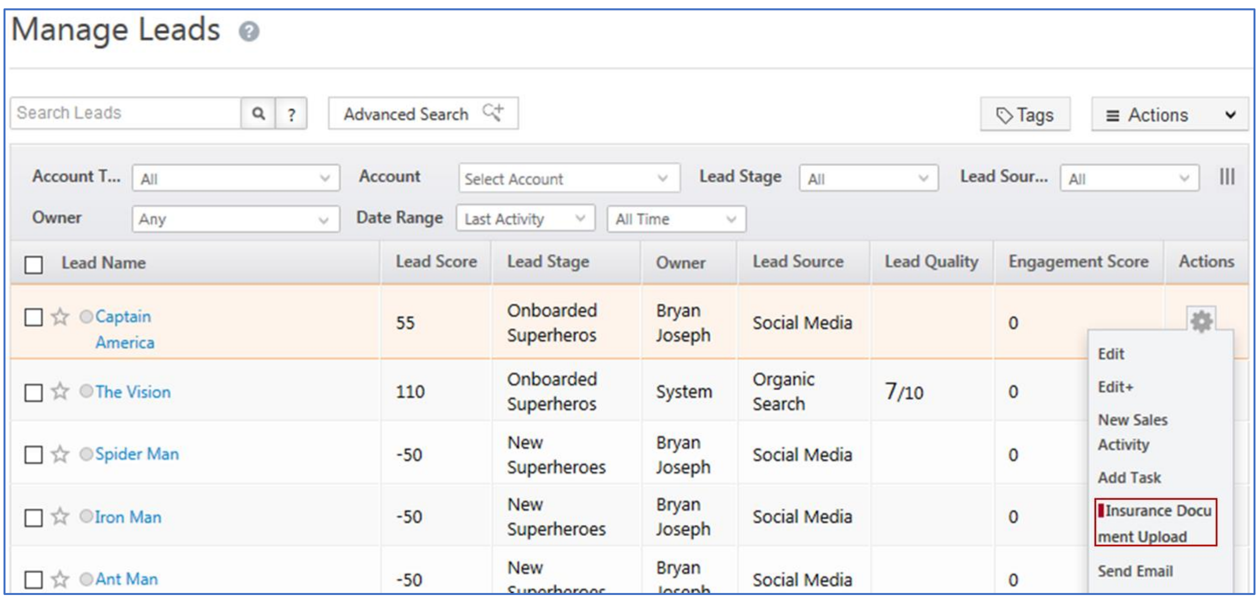
Step 10: Click on Publish and then on Yes to confirm.

Step 11: Logout and login to your LeadSquared account.

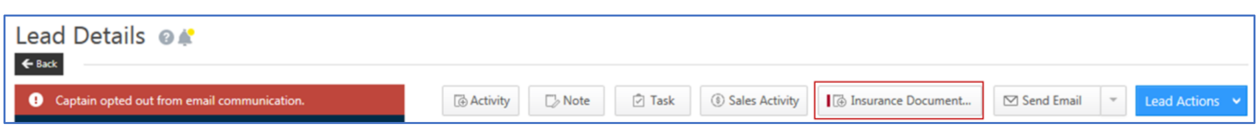
Step 12: Navigate to Manage Leads page. Notice Add New Lead button is now replaced with Insurance Document Upload form.



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



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



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!

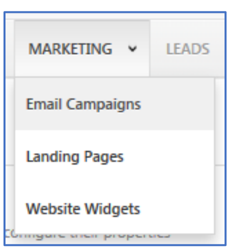
THANK YOU FOR CHOOSING S.H.I.E.L.D AS WE TOGETHER GO FOR GLORY!

WELCOME TO THE COOLEST FAMILY IN THE UNIVERSE

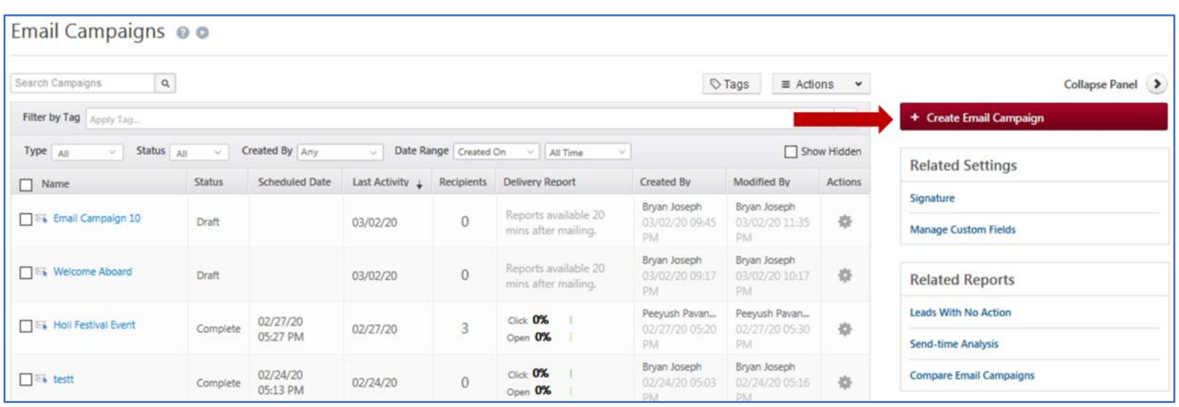
CONTACT US AT 100010001000, OR MAIL US AT SHIELDYOU@marvel.com

Step by Step: Creating Email Campaign

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

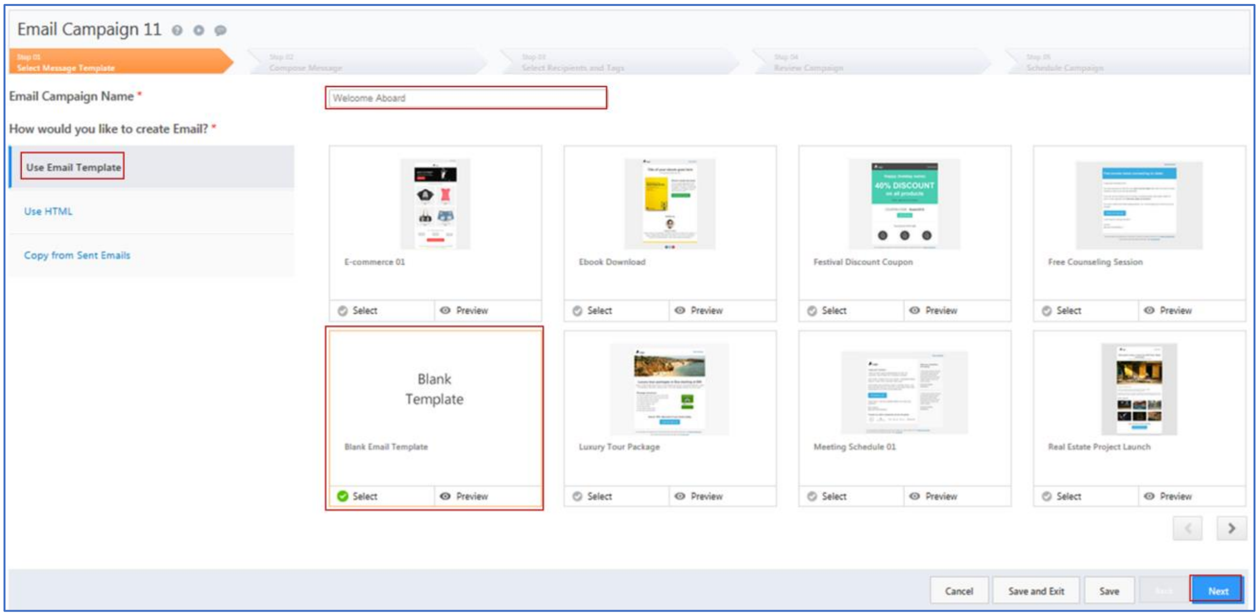


Step 2: Click on ‘Create Email Campaign’ to get started.



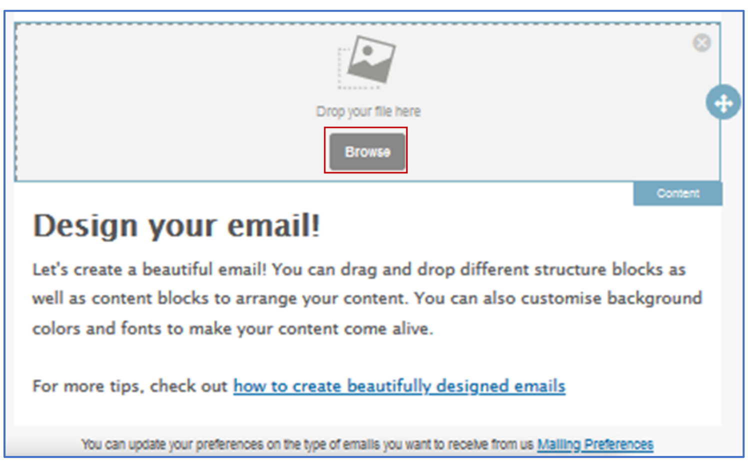
Step 3: Give “Welcome Aboard” as the Email Campaign Name.

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.

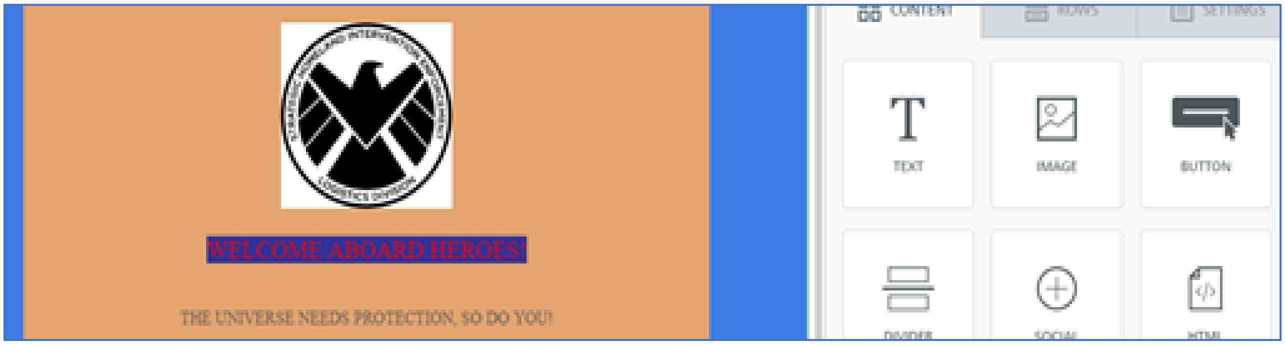


Step 7: Add the text required by double clicking on the content box and add content given below.

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

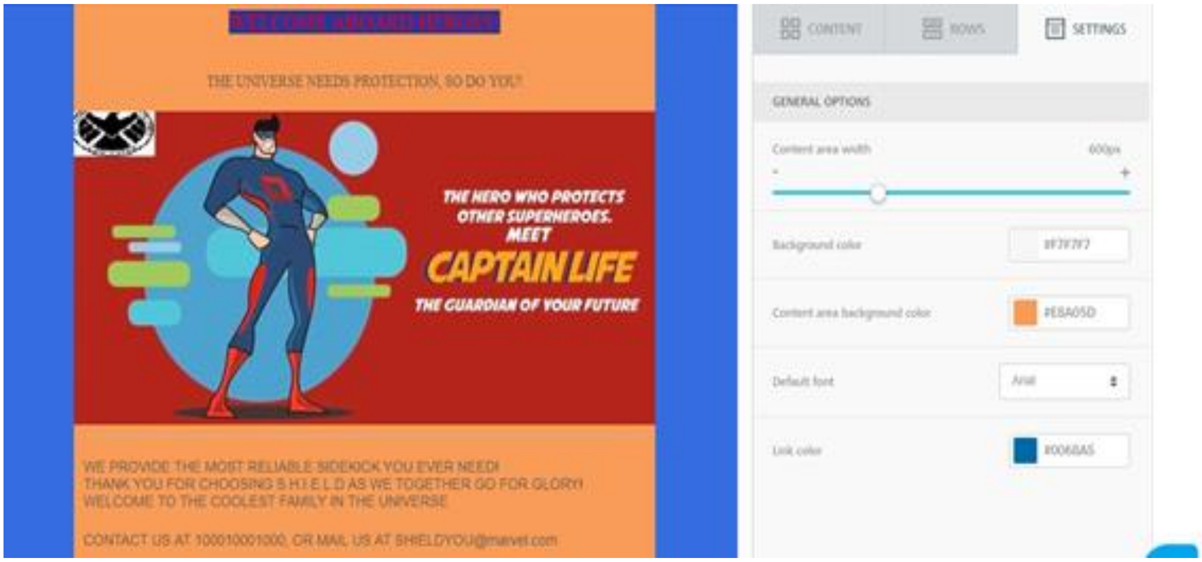
Step 9: Add a text block by dragging and dropping the ‘Text’ icon under the Content tab. Add the following content by double clicking on the text area.

WE PROVIDE THE MOST RELIABLE SIDEKICK YOU EVER NEED!

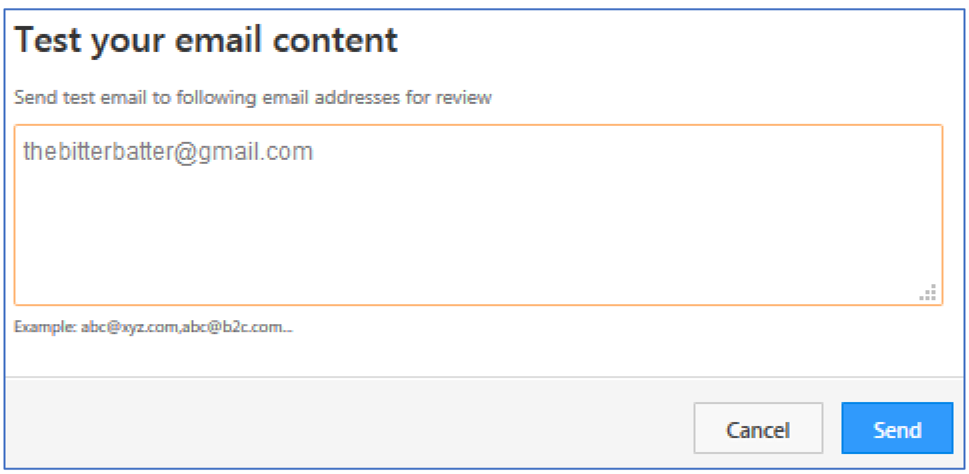
THANK YOU FOR CHOOSING S.H.I.E.L.D AS WE TOGETHER GO FOR GLORY!

WELCOME TO THE COOLEST FAMILY IN THE UNIVERSE.

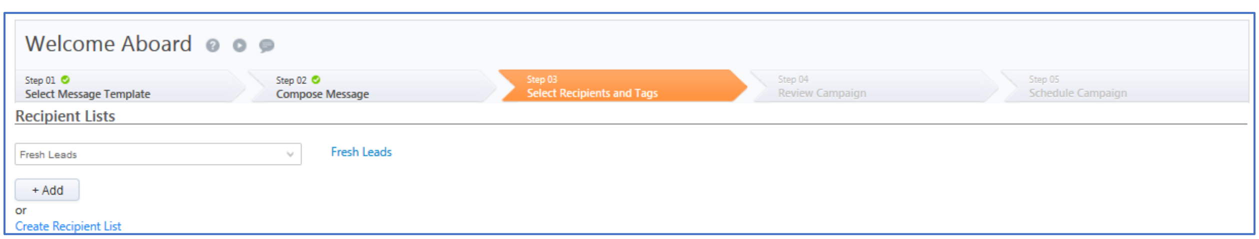
CONTACT US AT 100010001000, OR MAIL US AT SHIELDYOU@marvel.com



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'



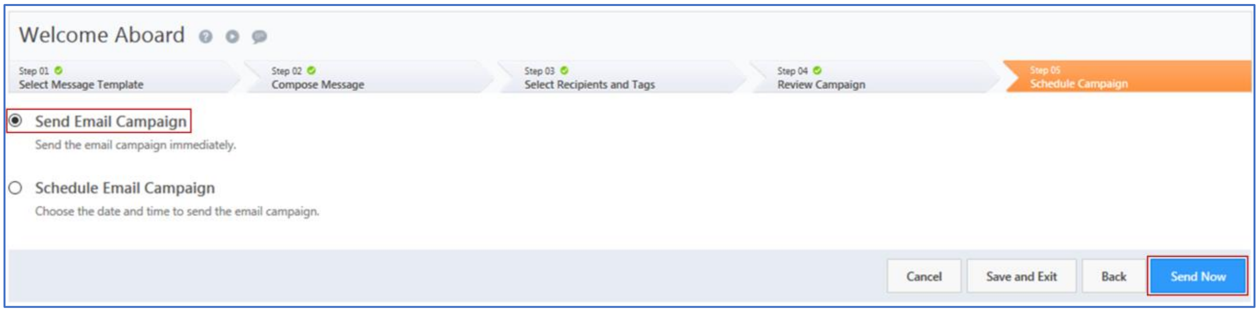
Step 11: Under Recipient Lists dropdown select the list 'Fresh Leads'



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'



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

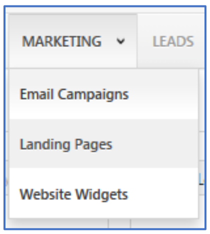
Landing Pages

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.

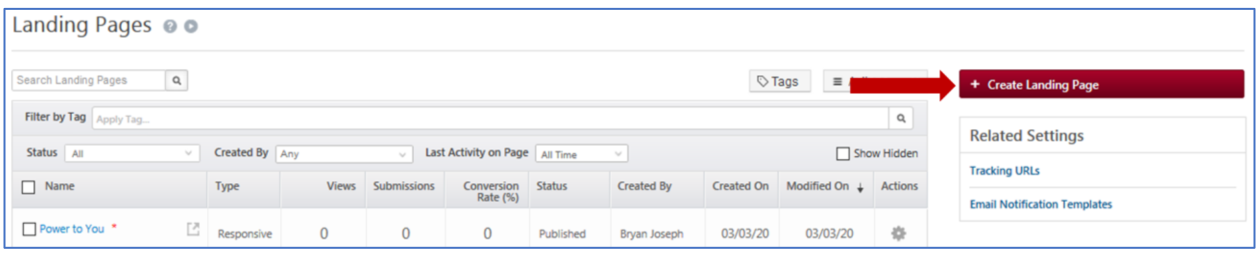
Step by Step: Creating a landing page

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

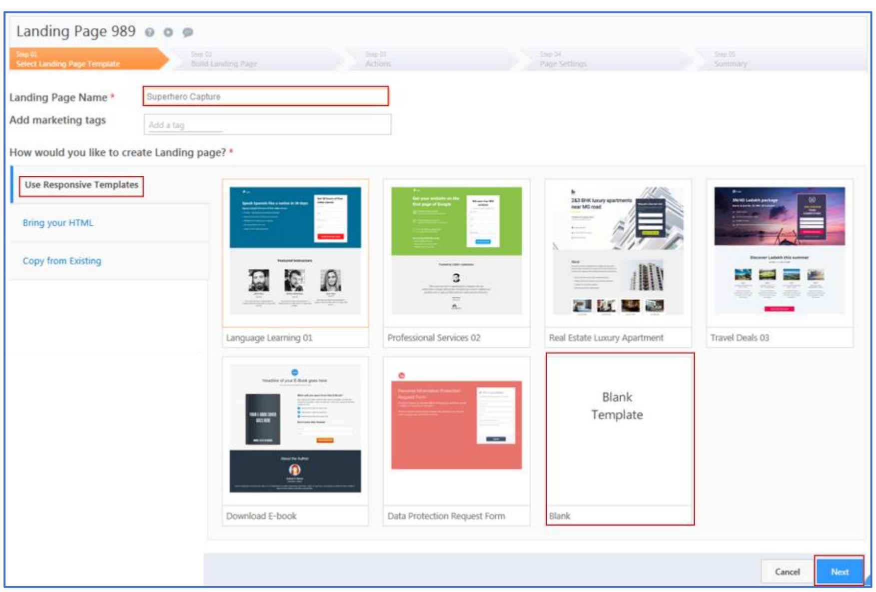
Step 1: From the top bar hover around marketing and from the dropdown select 'Landing Pages'.



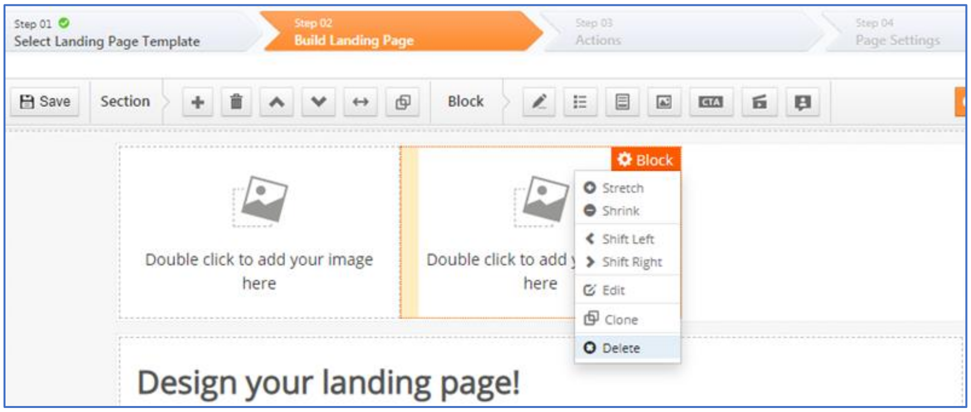
Step 2: Click on 'Create Landing Page' button



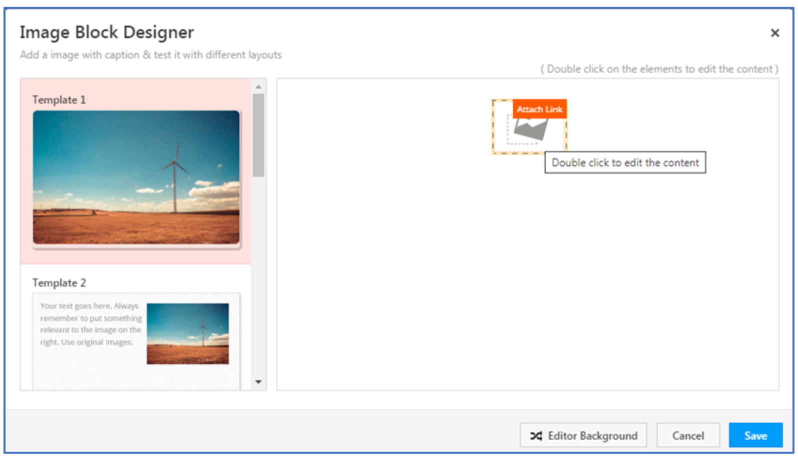
Step 3: Landing Page name should be 'Superhero Capture'. From the available templates select the 'Blank Template'. Click on 'Next'



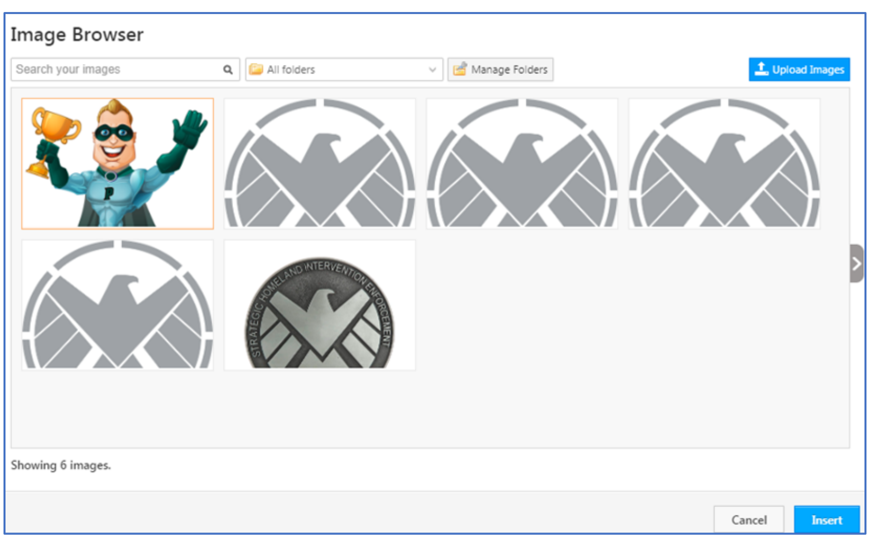
Step 4: Delete two of the three image blocks by clicking on the block and hovering around 'block' and from the dropdown click on 'Delete'.



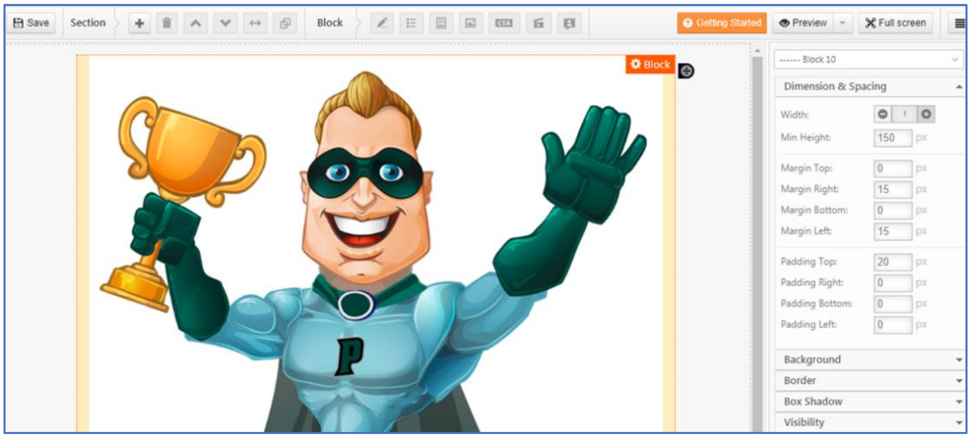
Step 5: Double click on the remaining image block, select 'Template 1'. On the right side, double click on the image to upload the content.



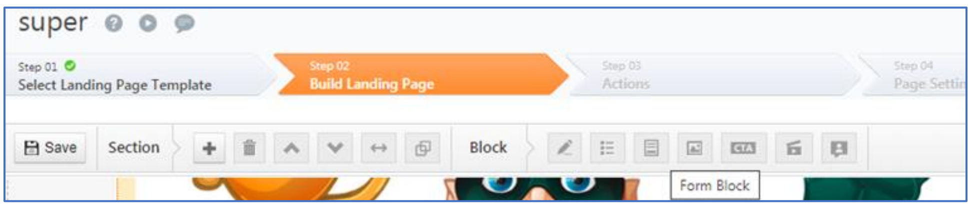
Step 6: Upload the image shared with you called 'Incredible'. Select it and click on 'Insert'. Click on 'Save'



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'

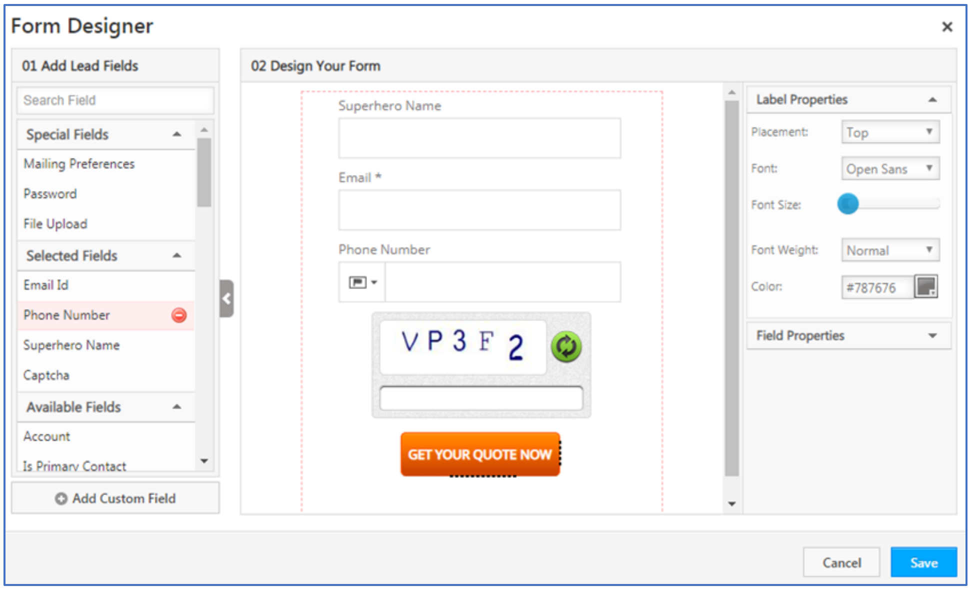


Step 9: Hover over the Form section you added, click on 'Block' and select 'Edit Header'. Insert the following text: "GET A QUOTE NOW". Click 'Save'.

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

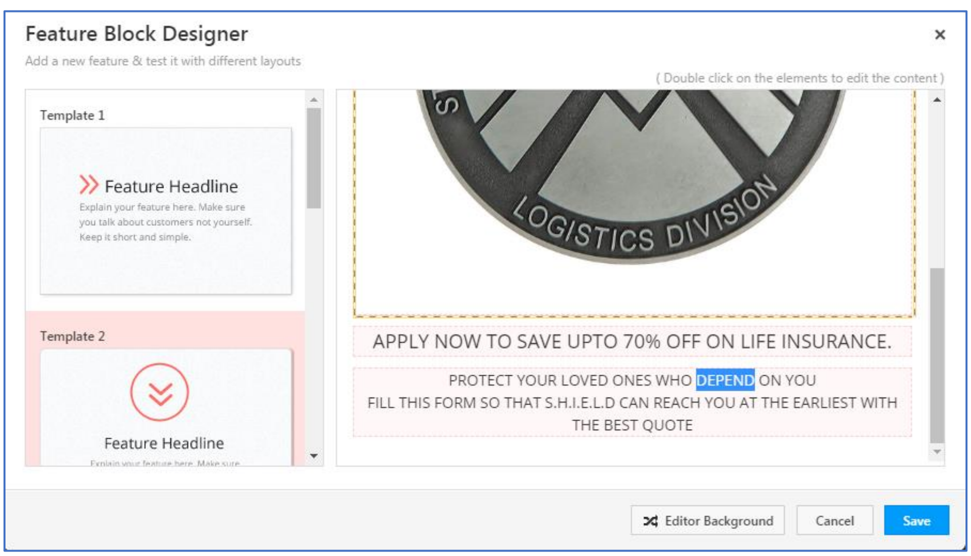
- Superhero Name
- Email
- Phone Number
- Captcha (in special fields)

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



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"

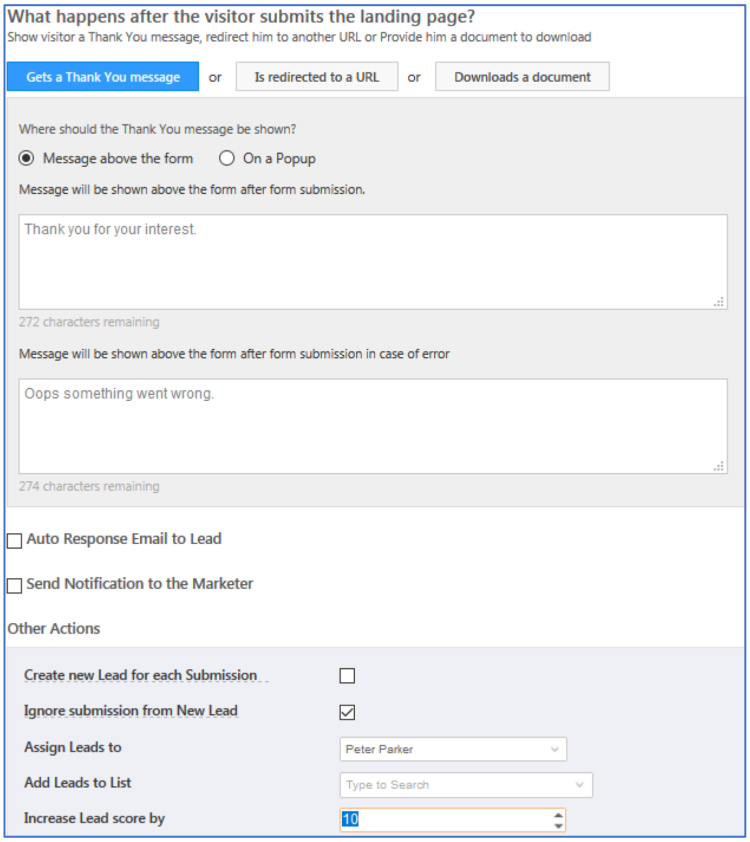


Step 12: Click on 'Save' and delete the description box

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



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.

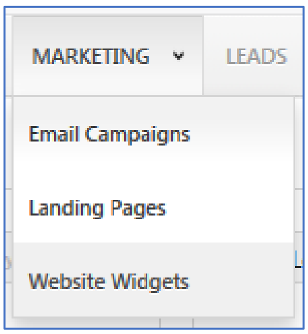
Chapter 16: Website Widgets

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.

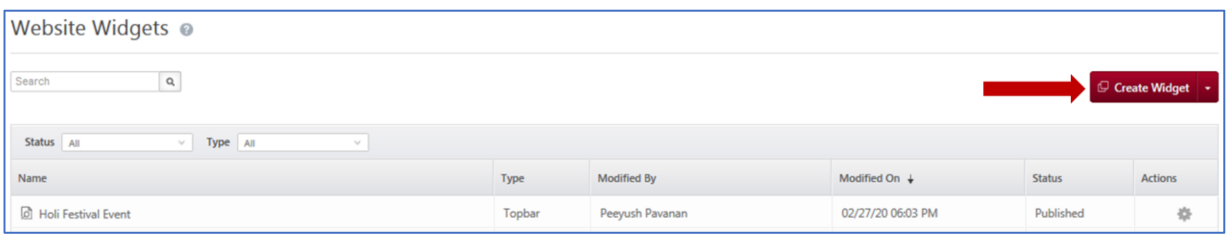
Let’s create a website widget on the landing page ‘Superhero Capture’ to direct the leads to the landing page ‘Power to You’ and informing them to register for the sales demo.

Step by Step: Creating Website Widget

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



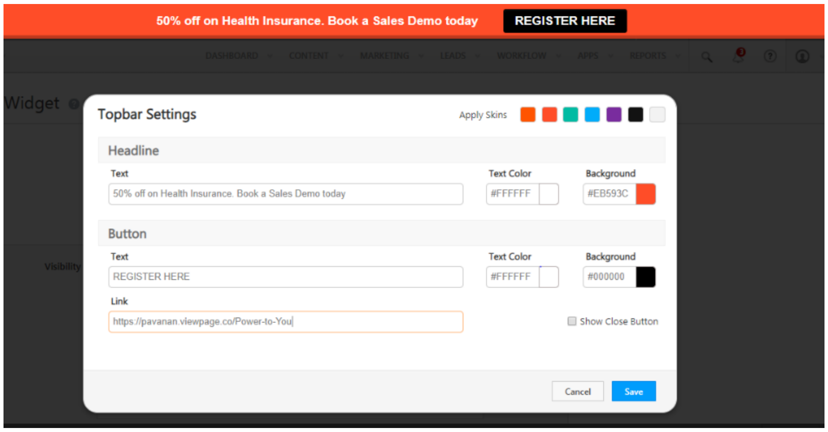
Step 2: Click on ‘Create Website Widget’



Step 3: Enter the name ‘Sales Demo’

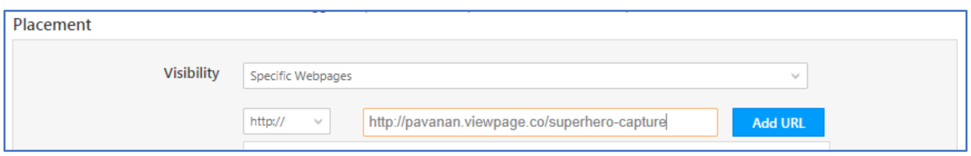
Step 4: Under Design, click on edit and enter the following

- 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.

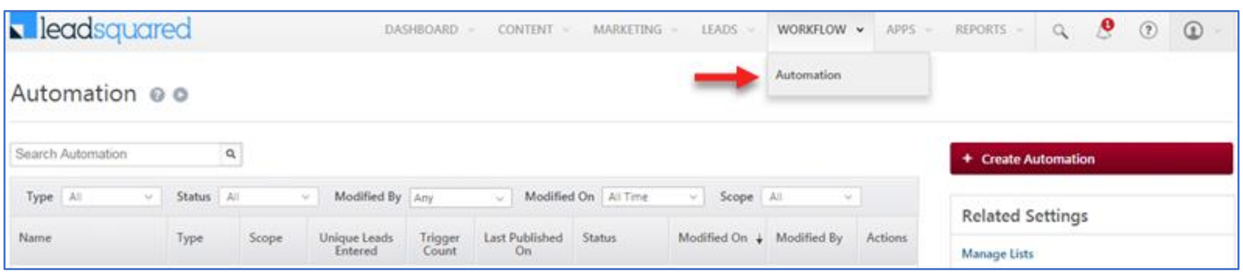
Here are some examples of what you can achieve through automation –

- 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…

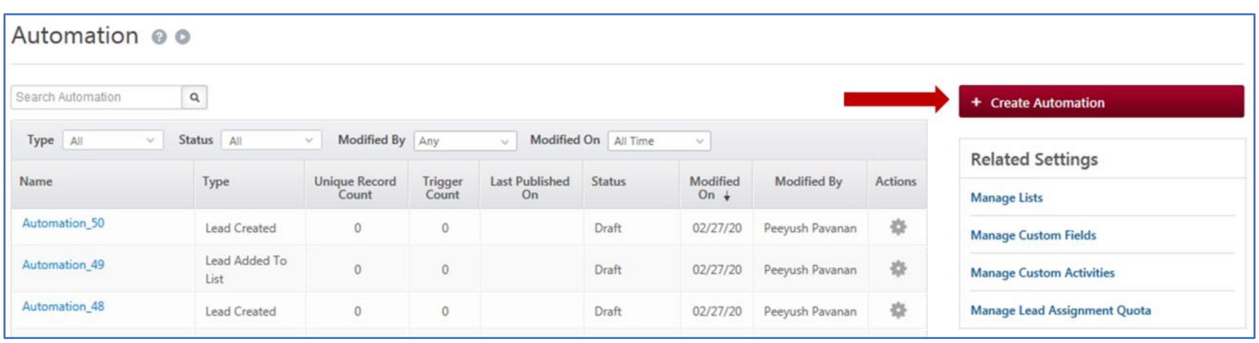
Step by Step: Creating Automation

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

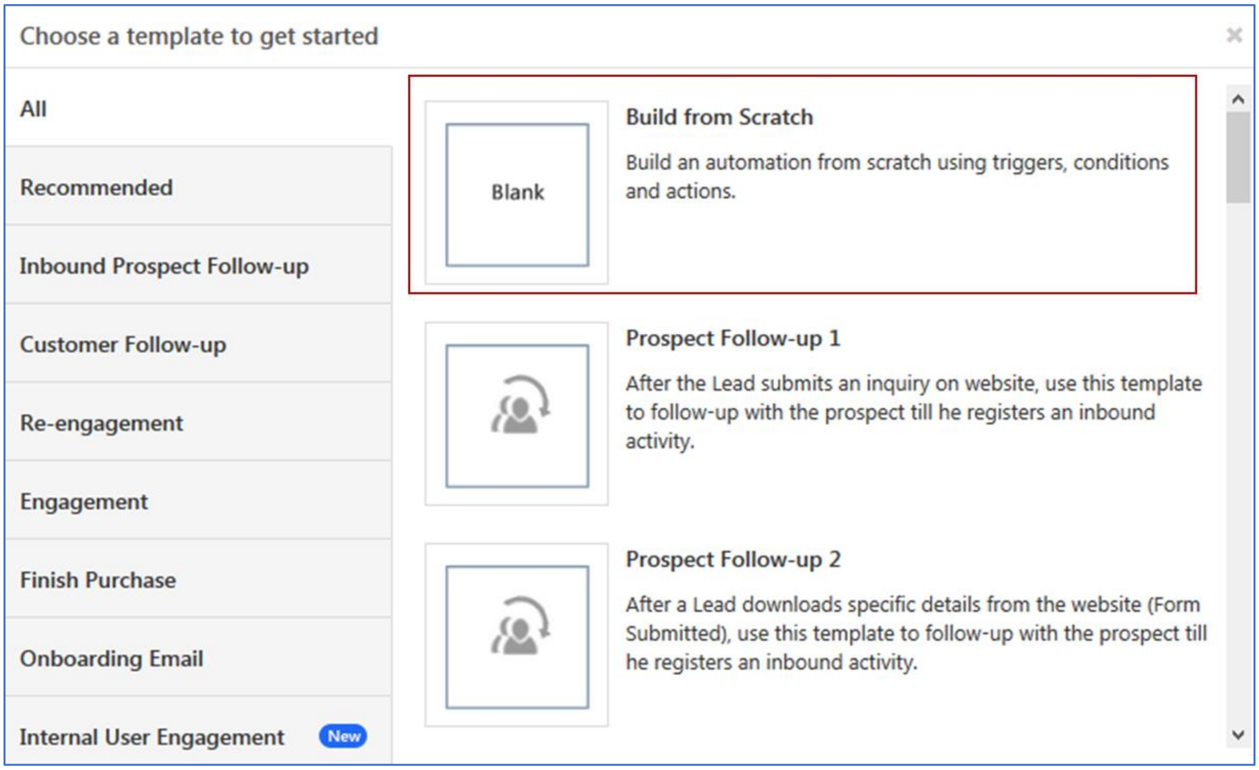
Step 1: To access automation, navigate to Workflow → Automation



Step 2: Click on Create Automation

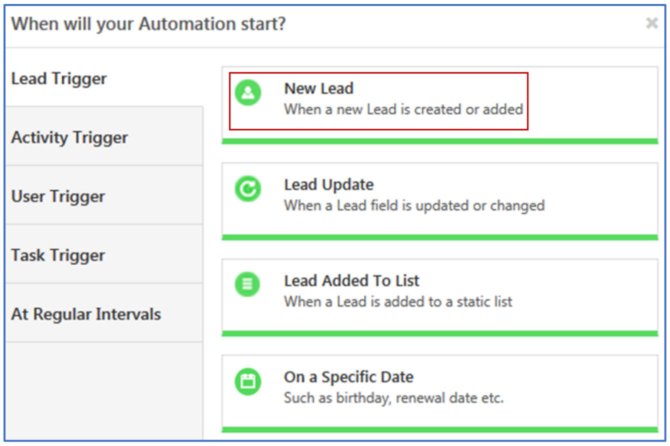


Step 3: On the next screen, you can choose pre-defined automation template and customize or build from scratch. For our case, we will select Build from Scratch template

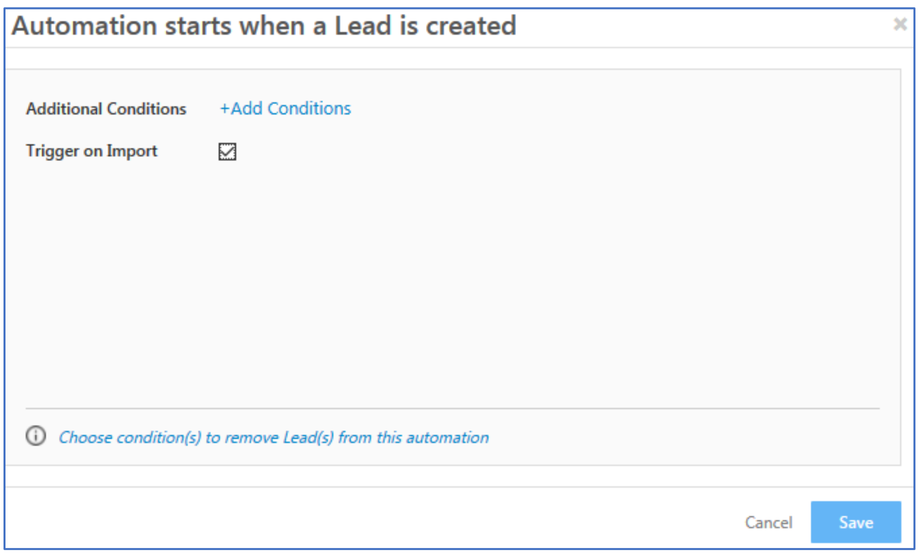


Step 4: For our purpose we will be selecting New Lead as the trigger point for executing the automation. Apart from New Lead trigger, we have following trigger points

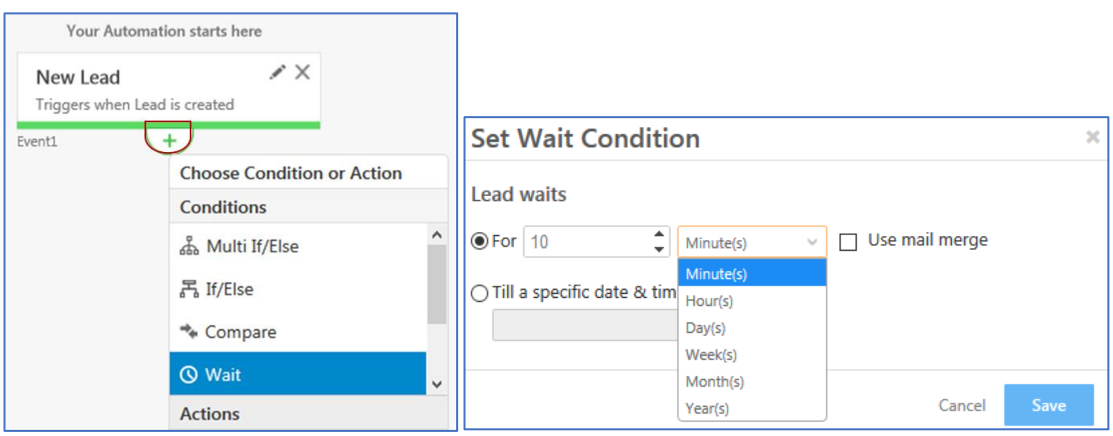
Category	Trigger	Explanation
Lead Triggers	New Lead Added	Triggers the automation when a new lead is created in your LeadSquared account.
	Lead Update	Triggers the automation when a lead field is updated.
	Lead Added to List	Triggers when a lead is added to a list.
	On a Specific Date	Triggers on a chosen 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.



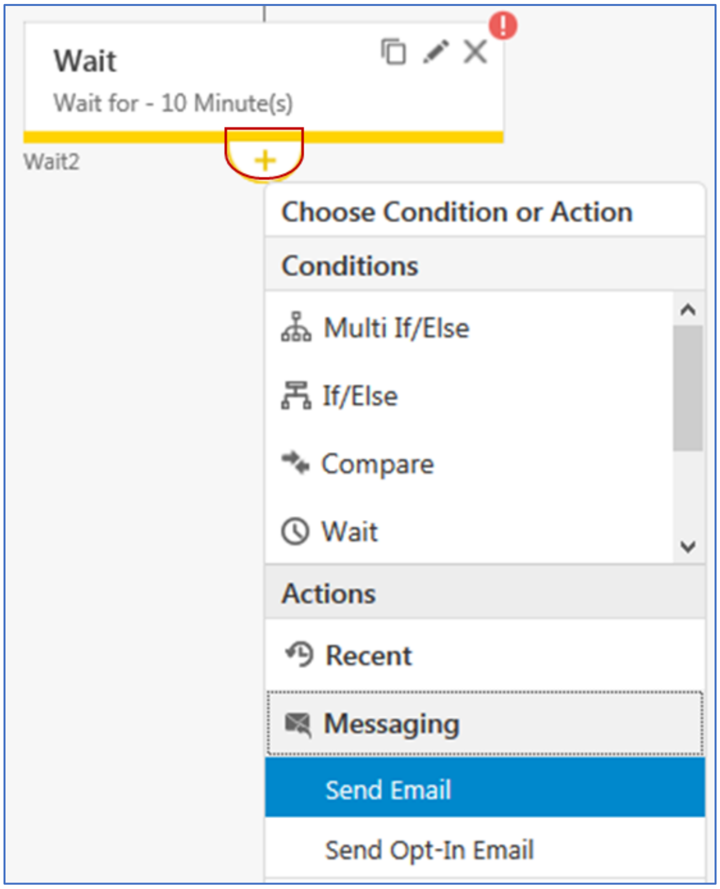
Step 5: Select Trigger on Import to trigger the automation when importing the leads into LeadSquared and click on Save.



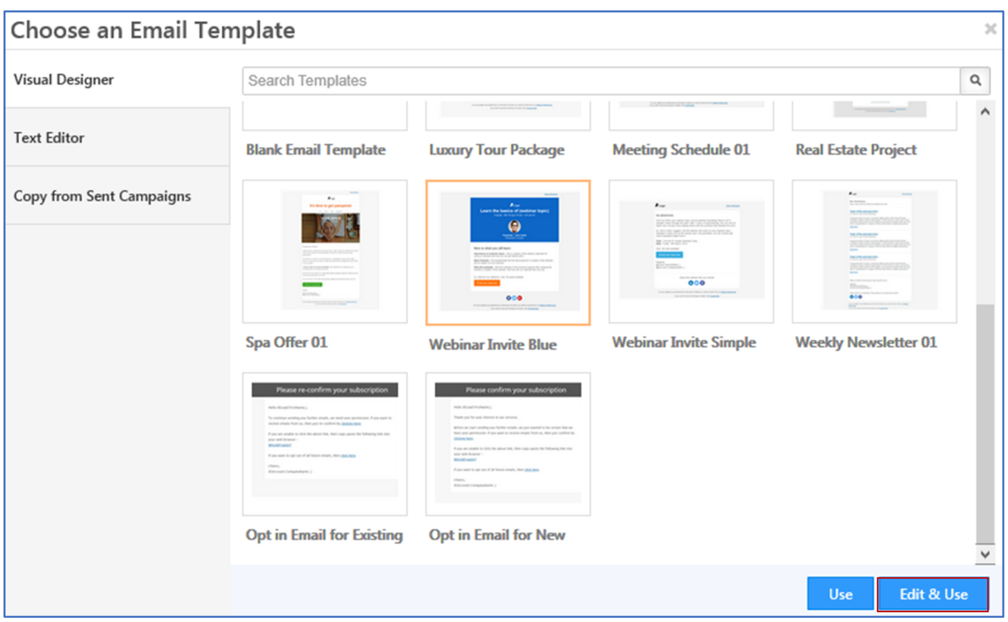
Step 6: Click on + icon below the trigger card and add wait condition for 10 minutes.



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

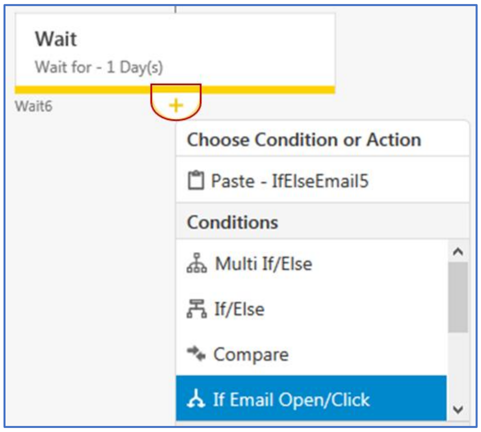


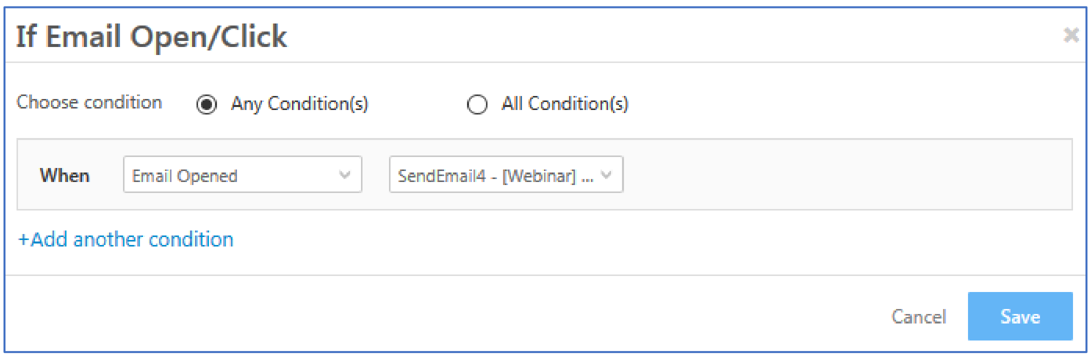
Step 8: Select Webinar Invite Blue. Edit the content with "Register for upcoming Webinar by S.H.I.E.L.D. Insurance firm" inviting leads to register for the webinar with a link to your "Power To You" landing page in it. Give an apt subject line with it.



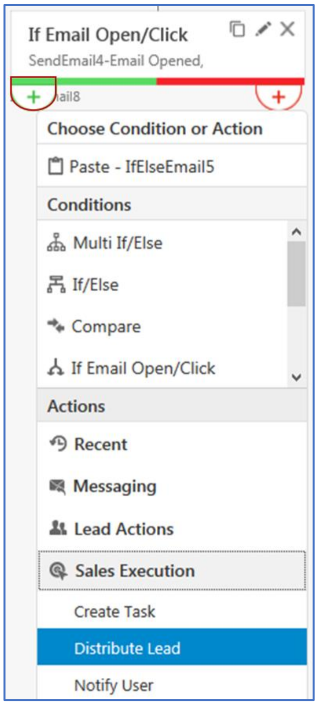
Step 9: Click on + icon under Send Email card and put Wait condition for 1 day

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).



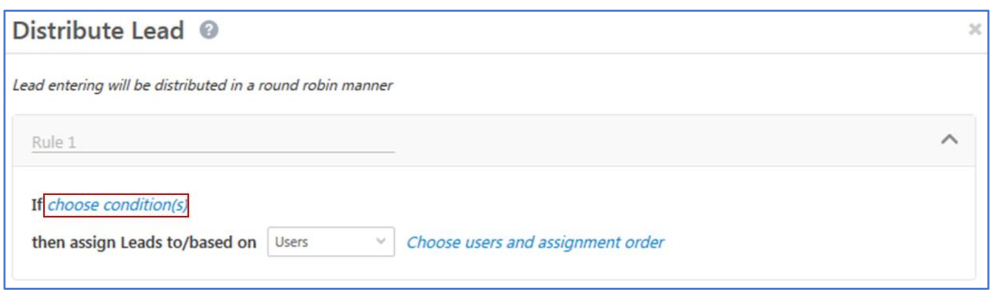


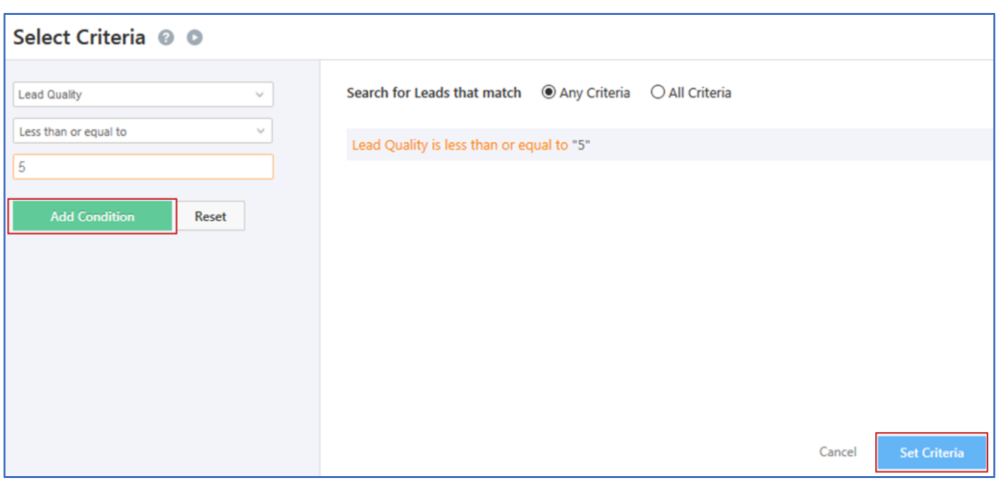
Step 11: Click on green + icon (If condition being true) and select Distribute Lead under Sales Execution



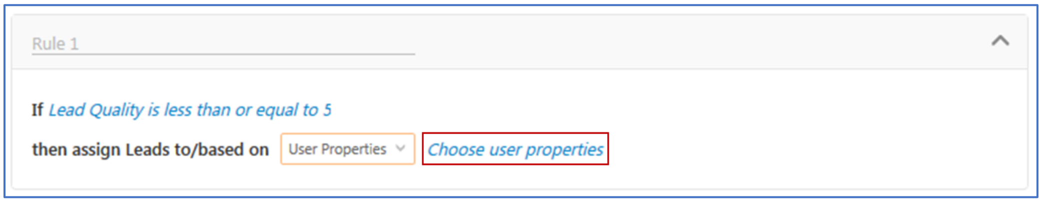
Step 12: Define the rules for distributing leads

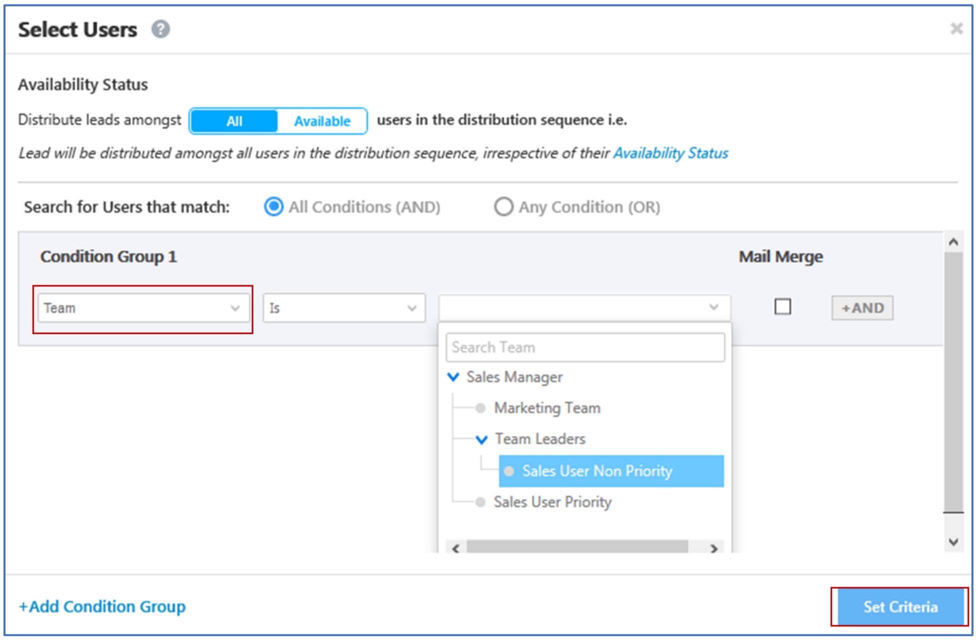
Rule 1: Click on choose condition(s) link and set the condition as Lead Quality is less than or equal to 5. Set the Criteria after adding the condition (screenshot, below)





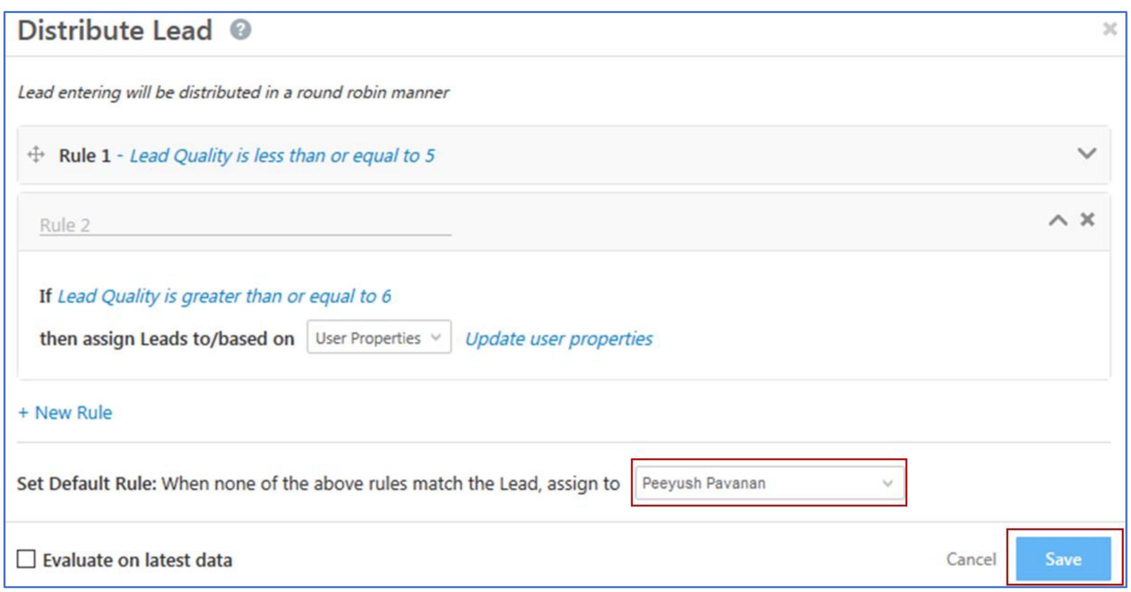
Step 13: For **assign leads to/based on**, select User Properties and click on Choose user properties link to select the Sales User Non Priority team. Click on Set Criteria once done.



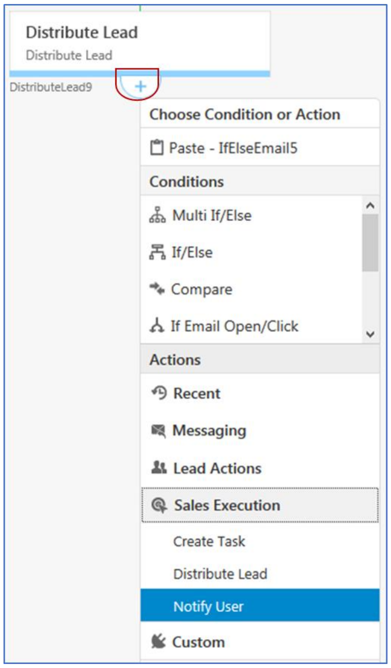


Step 14: DIY- Click on New Rule link to create Rule 2. Like rule 1, set the condition for rule 2 as Lead Quality is greater than or equal to 6. Assign leads to Sales User Priority team.

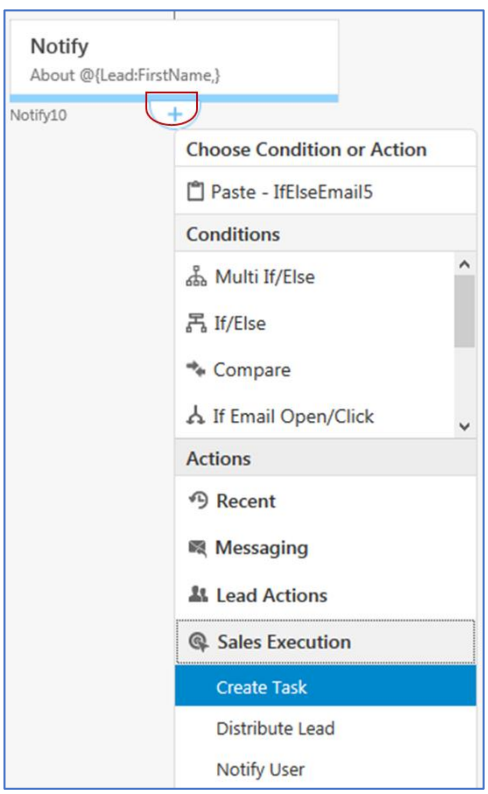
Step 15: Set Default Rule assignment to yourself. Click on Save.



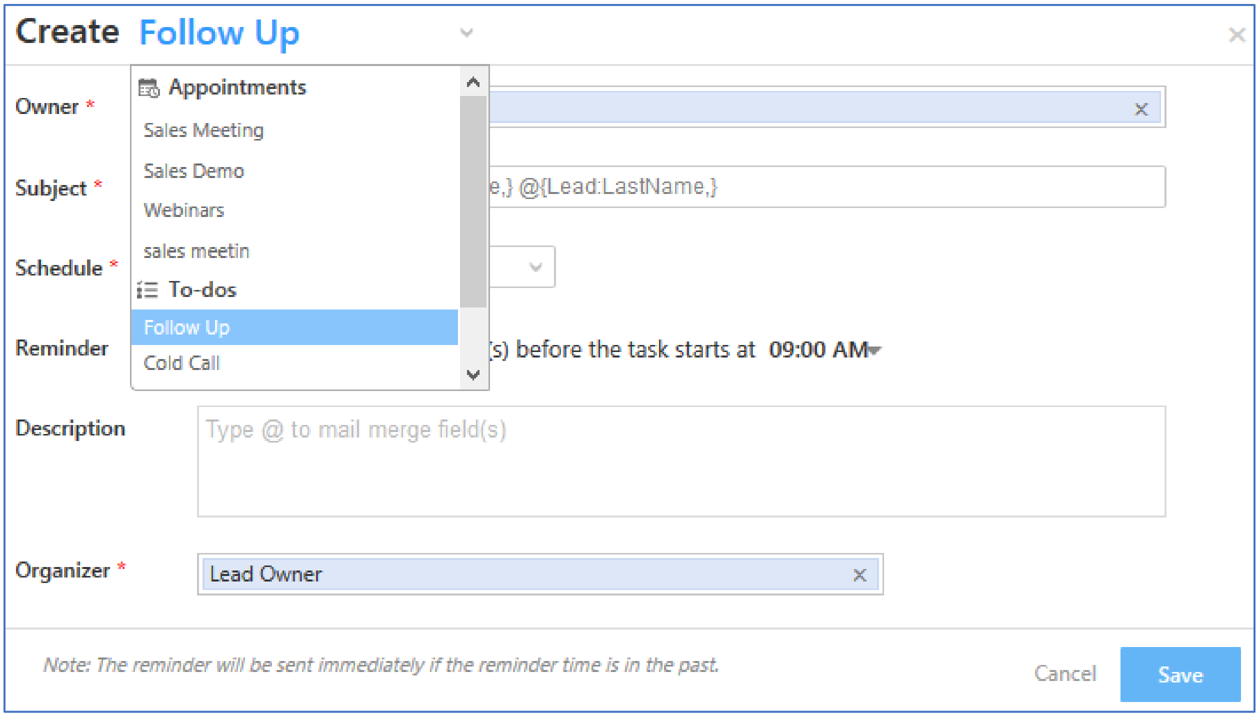
Step 16: Click on + icon below Distribute Lead card and select Notify User action under Sales Execution to send the notification to the respective lead owners. Click on Save once you are satisfied with the content that will be sent to the lead owners.



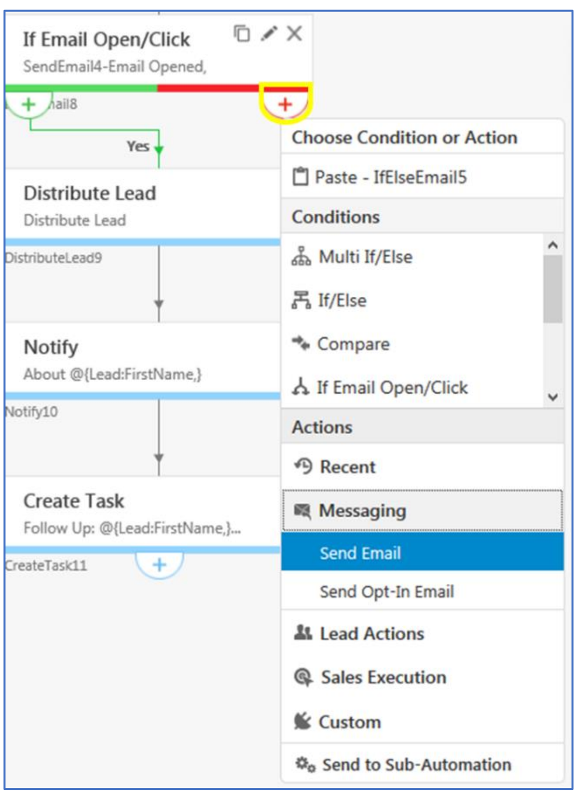
Step 17: Click on + icon under Notify User card and select Create Task under Sales Execution.



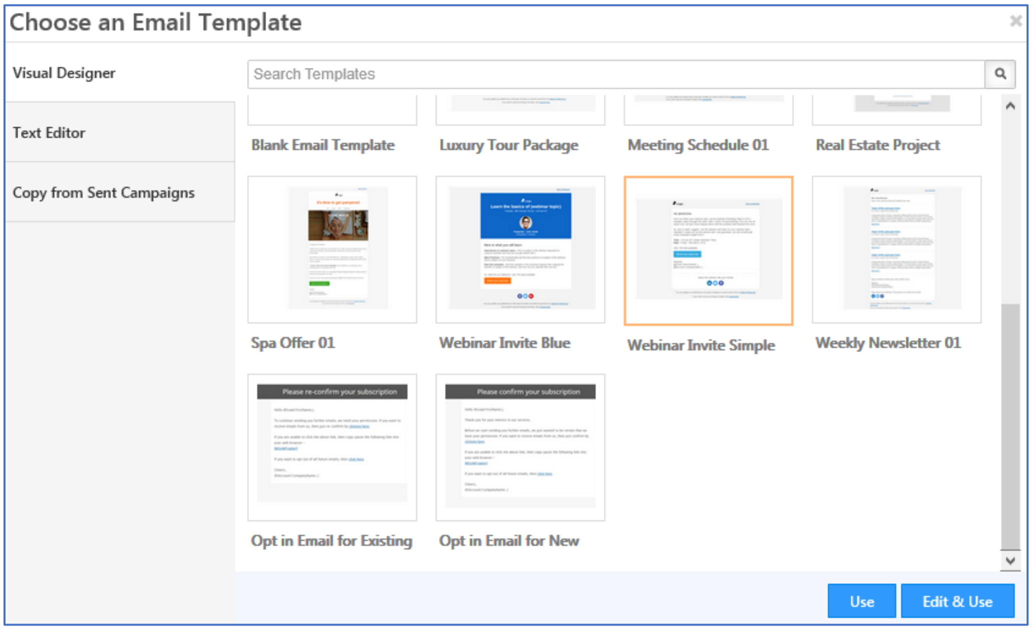
Step 18: Select Follow Up from the drop down and retain everything else as it is. Click on Save.



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.

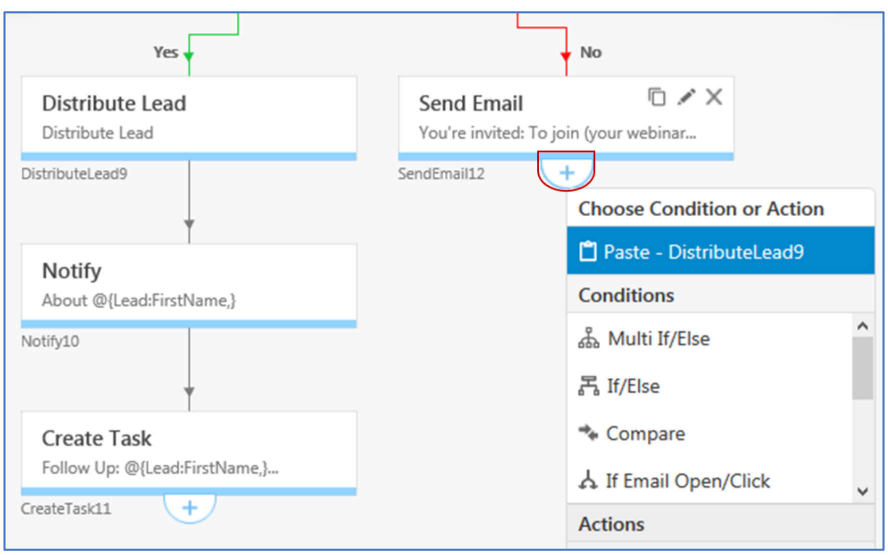


Step 21: This time we will not be validating if the leads are opening the email or not. We will be distributing the leads among the Non Priority Sales User and Priority Sales User teams with notification to lead owner. Also, creating Follow Up task like what we did before.

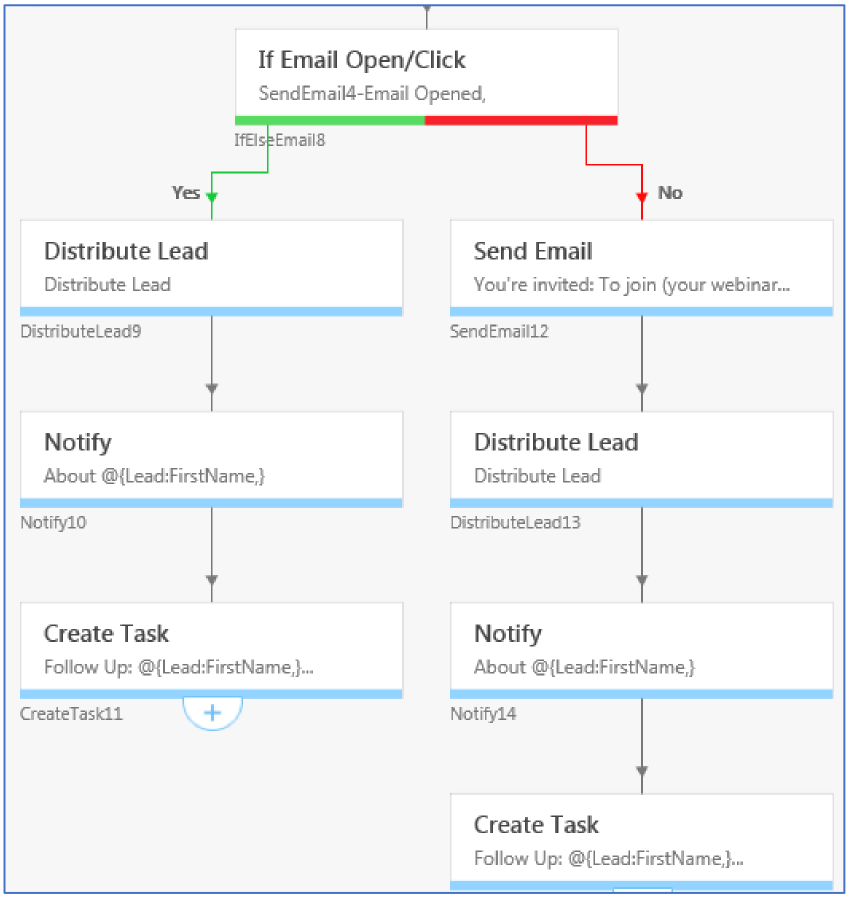
To do so, we won't set it up from scratch, but we will copy the existing Distribute Leads card, Notify User card and Create Task and paste it under Send Email card.

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.