


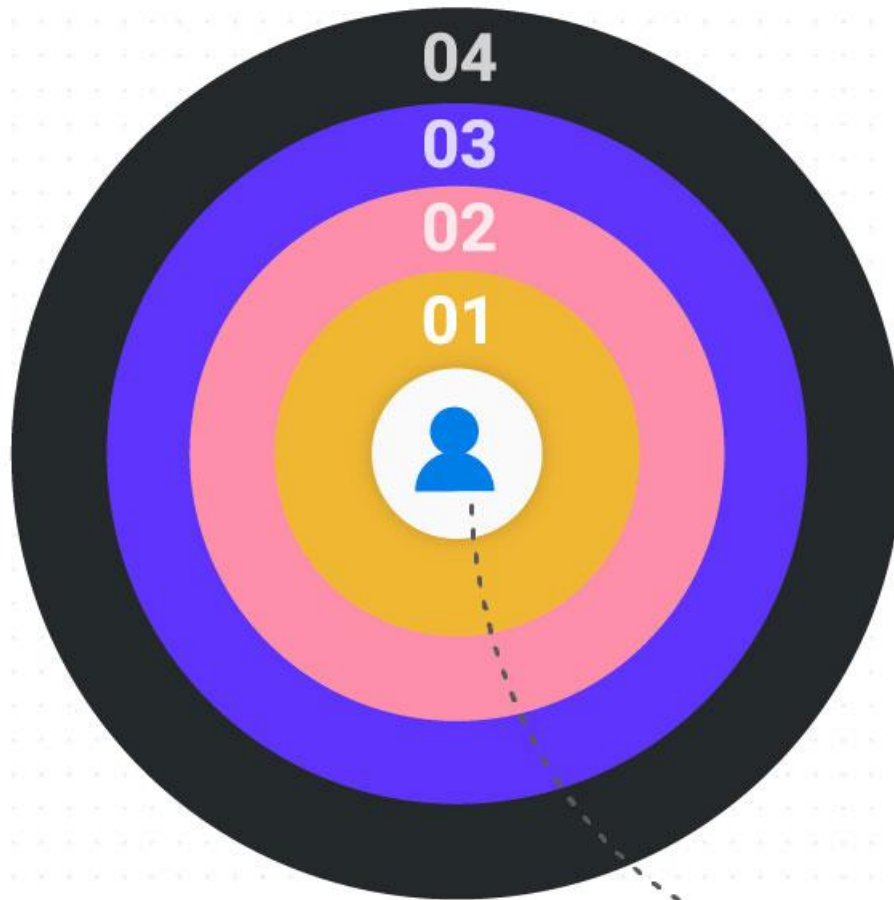
HOW TO ENSURE BUSINESS CONTINUITY USING LEADSQUARED

#Workfromhome



- 
- How to check up on employees working from home (WFH)
 - How to get insights into the productivity of your teams
 - How to keep your data safe while WFH is in place
 - How to track phone calls/meetings/messages
 - How to ensure work carries on in case of bad/no connectivity
 - How to set up internal notifications and escalations

CHALLENGES WITH “WORK FROM HOME”



01

Basic Needs
That Drive WFH

- CONNECT
- COMMUNICATE
- COLLABORATE



03

Governance Aspect for
Management of WFH

- COMPLIANCE
- RISK
- GOVERNANCE



02

LeadSquared Features
That Enable WFH

- ACCESSABILITY
- ASSIGN TASK
- MESSAGING
- MOBILITY
- ALERT NOTIFICATION
- AUTOMATION
- PLAN




04

Benefits and How
to Leverage It

- REDUCED OPERATIONAL COST
- BUSINESS CONTINUITY
- FASTER TIME TO CONNECT
- IMPROVED CUSTOMER EXPERIENCE
- HIGHER FLEXIBILITY & AGILITY
- HIGHER PRODUCTIVITY
- EMPLOYEE RETENTION
- IMPROVED EMPLOYEE EXPERIENCE

The Employee



Do you want/need any specific features
to make remote working / WFH,
more efficient?



HOW CAN LEADSQUARED
HELP SALES REPS
REACH THEIR PROSPECTS



Customer Portal



Digital Document Collection



Video KYC



Cloud Calling



Communication Tool

MAKING REMOTE WORKING, MORE EFFICIENT

CUSTOMER PORTAL



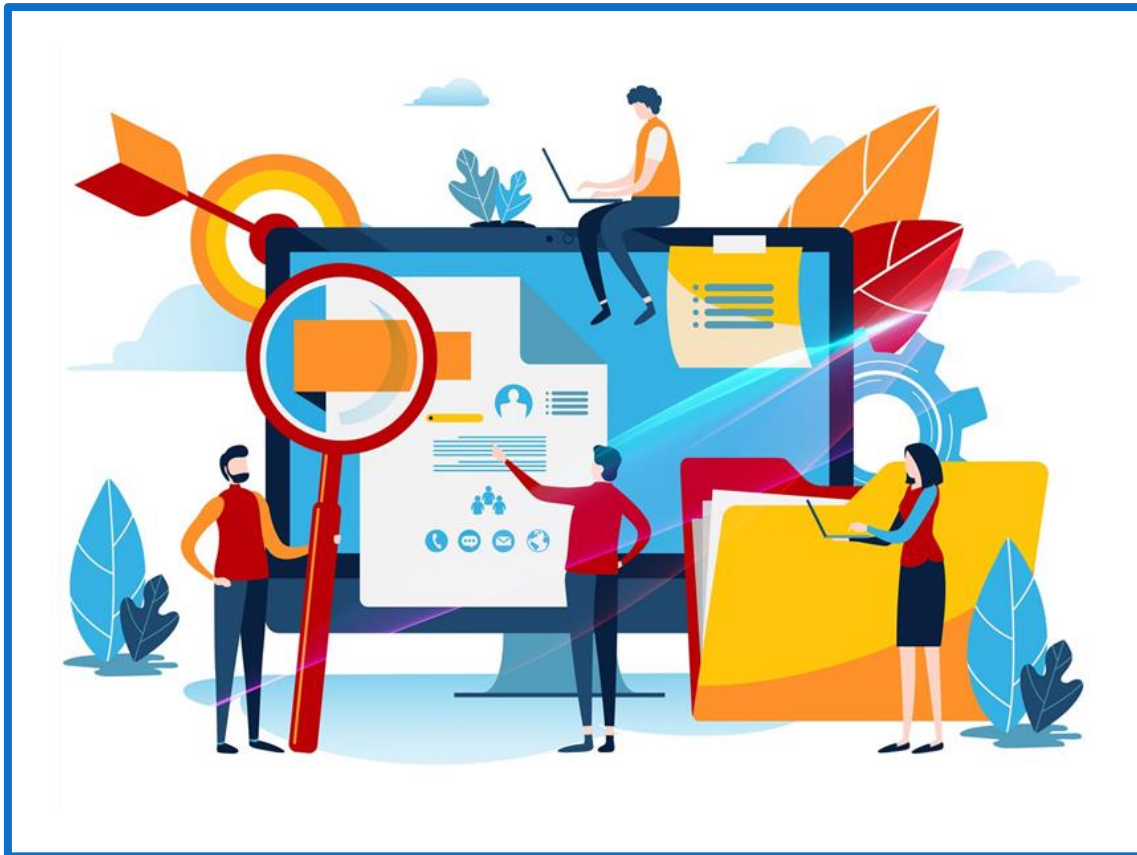
- The LeadSquared Customer Portal is a process agnostic platform powered by the “Forms & Processes” feature.
- Using Forms & Processes, you can create application forms for any product and generate cross-sell, upsell offers.
- Direct integration of the portal with LeadSquared instantly creates lead/opportunities in the LeadSquared application, which can then be distributed among sales reps or account managers, as per the defined logic.
- LeadSquared portal can also be used to enable the digital sharing of documents by customers/prospects.

VIDEO KYC



- The LeadSquared platform can integrate with Video KYC tools that enables sales reps to perform KYC without even stepping out of their homes.
- You can speed-up customer on-boarding, reduce drop-offs and eliminate bad actors.
- It is a regulatory compliant solution with integrated checks for PAN card, Aadhar XML file, Face Compare, Geo-Tagging and Aadhar Masking.

DIGITAL DOCUMENT COLLECTION



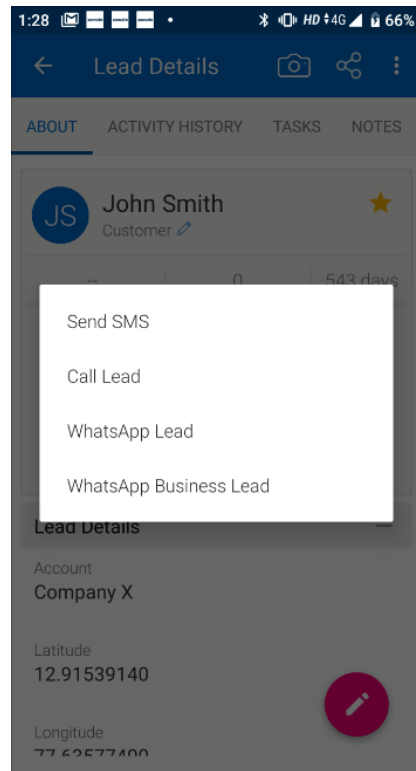
- The LeadSquared portal enables sales/account reps to collect customer documents without stepping out of their homes.
- LeadSquared can send an SMS/Email to the customer with a 'Documents Upload' link. Multiple file formats are supported.
- Parallel follow up call can also be made to the customer to guide him/her.
- LeadSquared integration with 'Document Recognition' tools can help in minimizing back-n-forth between PB/SO and the customer, and creates a feedback loop on the portal itself.

CLOUD CALLING



- The LeadSquared platform comes seamlessly integrated with Ameyo Cloud Calling solution.
- Like Uber, it masks the number and places the call via a Virtual Number.
- It enables your Call Centre to function from home and your telecalling teams to place a call to the customer without compromising security concerns.

COMMUNICATION TOOL



- Users can also reach out to their customers via **email and WhatsApp**, directly from the LeadSquared app.



**REDUCE THE DISTANCE
BETWEEN MANAGERS &
TEAM MEMBERS,
WITH LEADSQUARED**



Attendance Management



Internal Broadcast



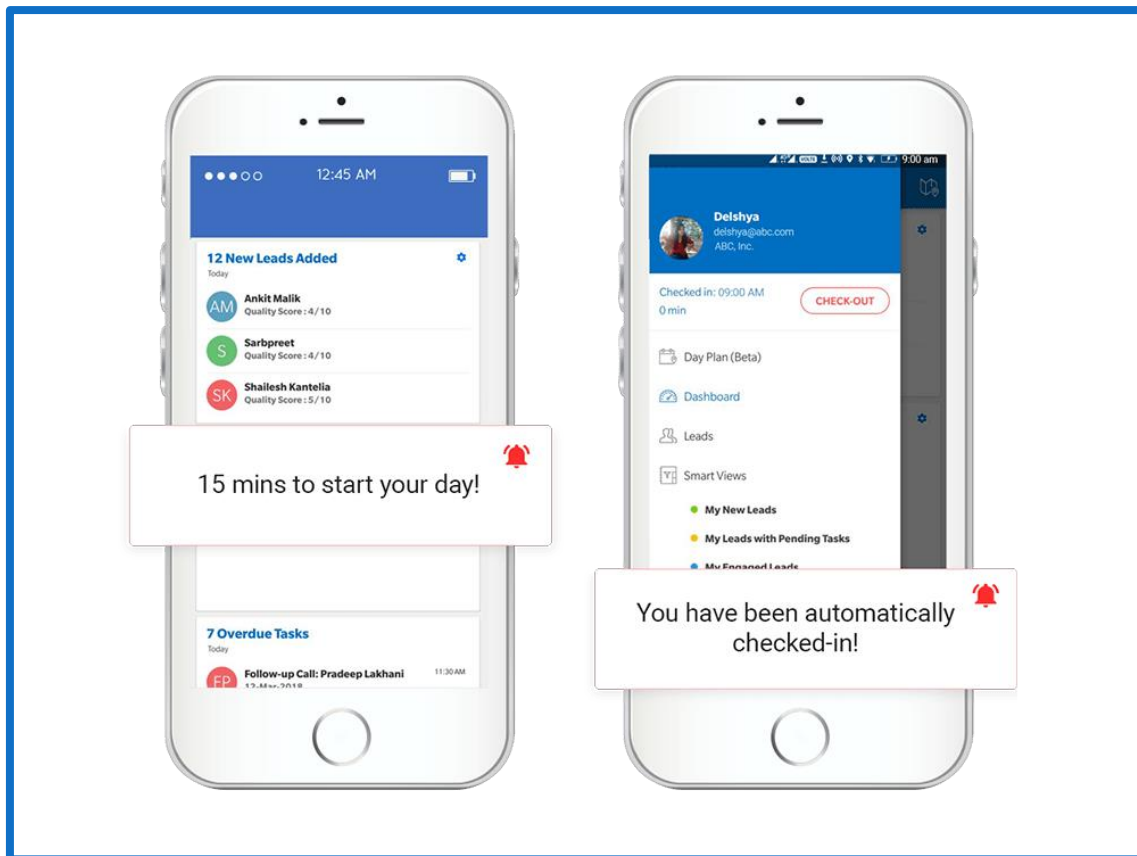
TAT & Escalation



Productivity

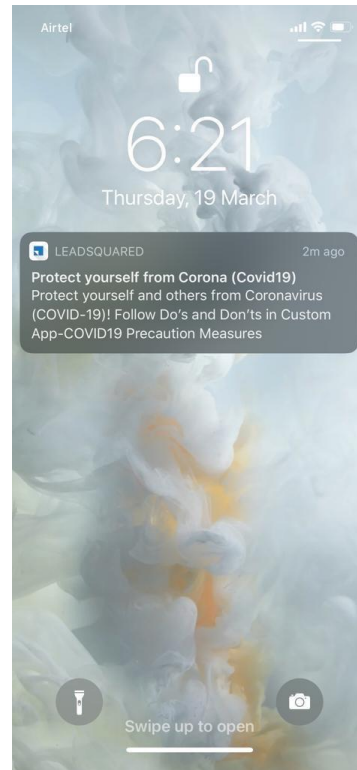
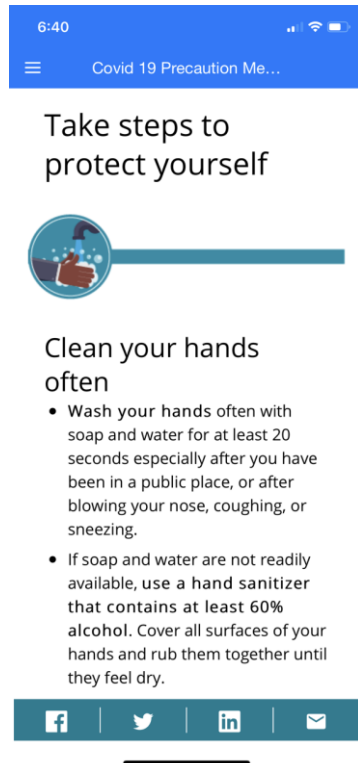
MAKING REMOTE WORKING, MORE EFFICIENT

AUTO CHECK-IN CHECK-OUT TO CONTROL WORKING HOURS



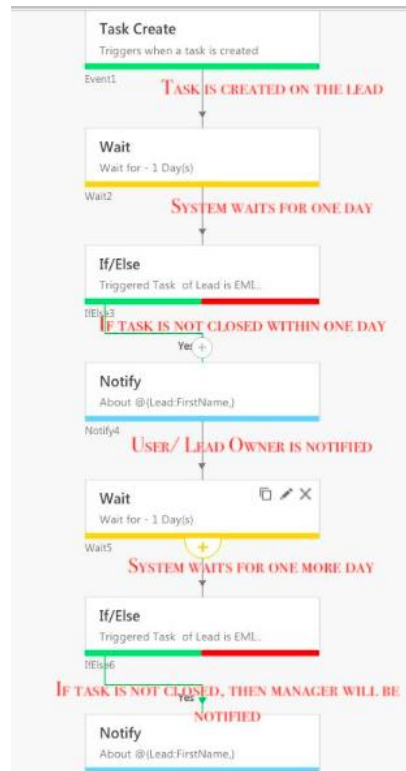
- The Check-in Check-out feature will give you transparency into the work hours of your users and their general attendance trends.
- Users can check-in to indicate that they are starting their day and similarly, check out at the end of the day.
- Using Automation functionality, you can Auto Check-in Check-out the users at the start and end of day.

INTERNAL BROADCAST FUNCTION – EMERGENCY BROADCASTS



- If need be, the LeadSquared platform can be used to spread awareness about the Coronavirus and how that would affect their work and the precautions they should follow.
- Host an **HTML page under Custom Apps** so that this information is communicated and will always be there with the user on the LeadSquared App.

TAT & ESCALATION CONTROL



- Automations can also be used to escalate to team managers, in case of delays in completing tasks or updating leads/activities in a predefined TAT.
- Here's a sample automation wherein whenever a task is created,
 - The first notification goes to the owner if the task isn't completed on a defined TAT.
 - The second notification goes to the manager after 48 hours.
 - You can set up interval and important triggers on which users should be notified.

EYE ON PRODUCTIVITY



- LeadSquared ships out 100+ reports which can cater to lot of reporting requirements, for any type of business.
- LeadSquared's Custom Dashlet Builder and Custom Reports can be used to create and publish custom reports as per the specific needs of the business.
- In the Appendix section, screenshots of many reports specific to User Attendance, Performance, Targets Vs. Achievement, and Productivity, are included.



**PRODUCT ROADMAP,
PRODUCTIVITY REPORTS &
DATA SAFETY**

WITH LEADSQUARED

FEATURES COMING SOON!



Digital Signature of Documents



Messaging Platform



Integrated Video Calls

-
- **Integrated Internal Messaging platform** – A chat platform for boosting internal communication between members of the same team
 - **Custom Productivity Reports** – Custom reports specific to User Attendance, Performance, Targets Vs. Achievement, Productivity, etc.
 - **Social Collaboration & Content Management** – For quick distribution of latest information to staff

FEATURES WHICH ARE COMING SOON!!



POLL

TRACKING PEOPLE, PRODUCTS & PROCESSES

How do we keep a tab on –

- Attendance
- Activities and tasks
- Productivity
- TAT
- Escalations



User Login History



Filter Type Users

User(s) 70 selected

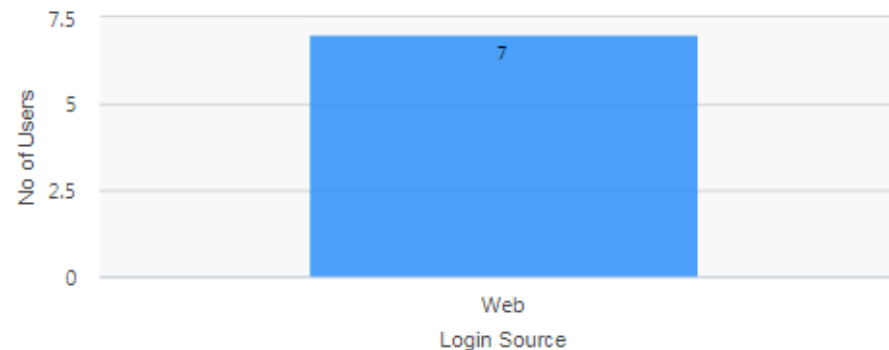
Login Source : Web, Mobile

Login time range: Today

Show

Login Day	User Name	Email	Phone	Time	Status	IP Address	Login Source
23/Mar/2020	Geetika Gandhi	gg@leadsquared.com	-	01:43:38 PM	Success	106.201.38.29	Web
	Prashanthi	finance.lsq@leadsquared.com	-	09:16:06 AM	Success	2405:204:5281:b73f:5	Web
	Pratibha Thakur	pratibha346@leadsquared.com	-	11:09:47 AM	Success	2401:4900:3310:282a:	Web
	Pratibha Thakur	pratibha346@leadsquared.com	-	11:09:39 AM	Failure	2401:4900:3310:282a:	Web
	Puja Roy	Puja.Roy@leadsquared.com	-	11:09:33 AM	Success	2409:4071:221a:fad4:	Web
	Rituparna Roychoudhury	rituparna.roychoudhury@leadsquared.com	-	12:46:47 PM	Success	122.183.149.19	Web
	Suhas	suhas.s.b@leadsquared.com	-	11:27:51 AM	Success	2409:4071:2080:47aa:	Web

Users by Logged-in Source



User Check-in and Check-out History



Select User(s): 168 selected ▼

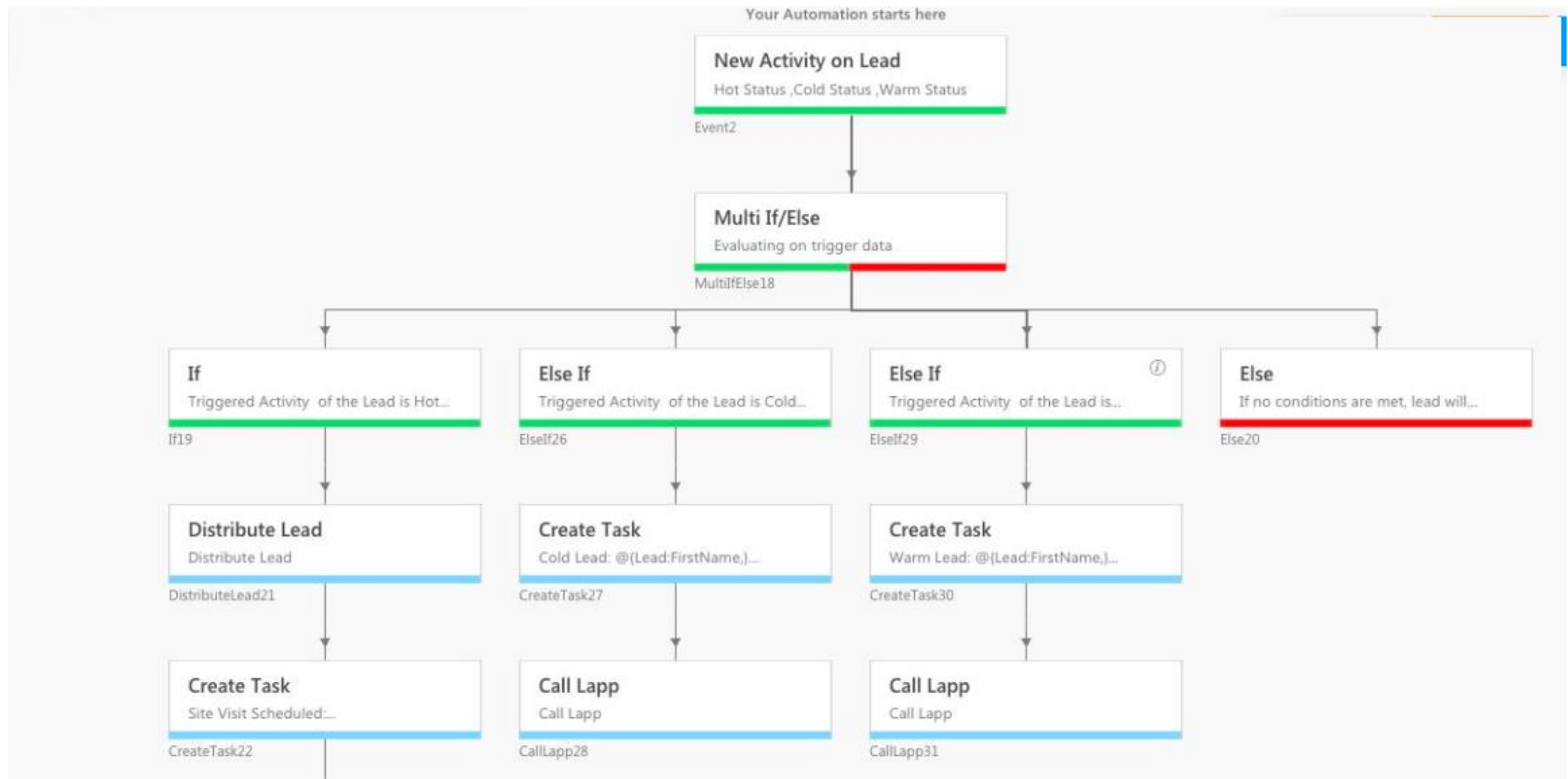
Time Range: This Month ⌵ Show

UserName	User Email	Activity	Source	Location	Time
Sumit Kumar Choudhary	sumitchoudhary57@gmail.com	Check-in	MobileApp	7, 40 Feet Road, Block D, Rajan Vihar, Hastsal, New Delhi, Delhi. 17 m from Zulfi Hair Cafe pin-110059 (India)	02-Mar-2020 13:42
	sumitchoudhary57@gmail.com	Check-out	MobileApp	446, Chatan Jain Marg, Block S2, Upadhyay Block, Shakarpur, New Delhi, Delhi. 12 m from Kitchenoid Tiffin Services pin-110092 (India)	02-Mar-2020 21:36
	sumitchoudhary57@gmail.com	Check-in	MobileApp	1, Najafgarh Road, Sainik Nagar Colony, Matiyala, New Delhi, Delhi. 96 m from Canara Bank ATM pin-110059 (India)	03-Mar-2020 12:38
	sumitchoudhary57@gmail.com	Check-out	Automation	81, Hanuman Mandir Road, Block C, Mansa Ram Park, New Delhi, Delhi. 34 m from Pizza Mania pin-110059 (India)	03-Mar-2020 13:30
	sumitchoudhary57@gmail.com	Check-in	MobileApp	274, Najafgarh Road, Nawada, New Delhi, Delhi. 11 m from Delhi Metro Pillar No 716 pin-110059 (India)	03-Mar-2020 14:52
	sumitchoudhary57@gmail.com	Check-out	MobileApp	64, Patel Nagar Bridge, Kirti Nagar Industrial Area, New Delhi, Delhi. 16 m from Delhi Metro Pillar No 270 pin-110015 (India)	03-Mar-2020 18:19
	sumitchoudhary57@gmail.com	Check-in	MobileApp	53, Baludhyan Road, Block J, Uttam Nagar, New Delhi, Delhi. 3 m from Sandwiches N More pin-110059 (India)	04-Mar-2020 17:36
	sumitchoudhary57@gmail.com	Check-out	MobileApp	11, Hanuman Mandir Road, Block C, Mansa Ram Park, New Delhi, Delhi. 13 m from Delhi Metro Pillar No 724 pin-110059 (India)	04-Mar-2020 18:42
Syed Danish Husain Naqvi	s.d.h.naqvi@gmail.com	Check-in	MobileApp	World Trade Centre Noida, Kalka Das Marg, Brijbasi Colony, Mehrauli, New Delhi, Delhi. 7 m from Insurance Agent pin-110030 (India)	01-Mar-2020 10:13
	s.d.h.naqvi@gmail.com	Check-out	Automation		01-Mar-2020 13:31
					02-Mar-2020

AUTOMATE TASKS & SALES NOTIFICATIONS TO TRACK ACTIVITIES & ESCALATIONS

Simple automations can be set up to notify managers and team owners about new leads, lead changes, lead assignment, activities etc. They can also be used to escalate to team managers, in case of delays in completing tasks or updating leads/activities.







Your Automation starts here

At Regular Intervals

Every 4 hour(s)

Event1



Webhook

Covid19 Alerts

UserPostWebhook3

Your Automation starts here

At Regular Intervals

Every 1 day(s) at 09:30 AM

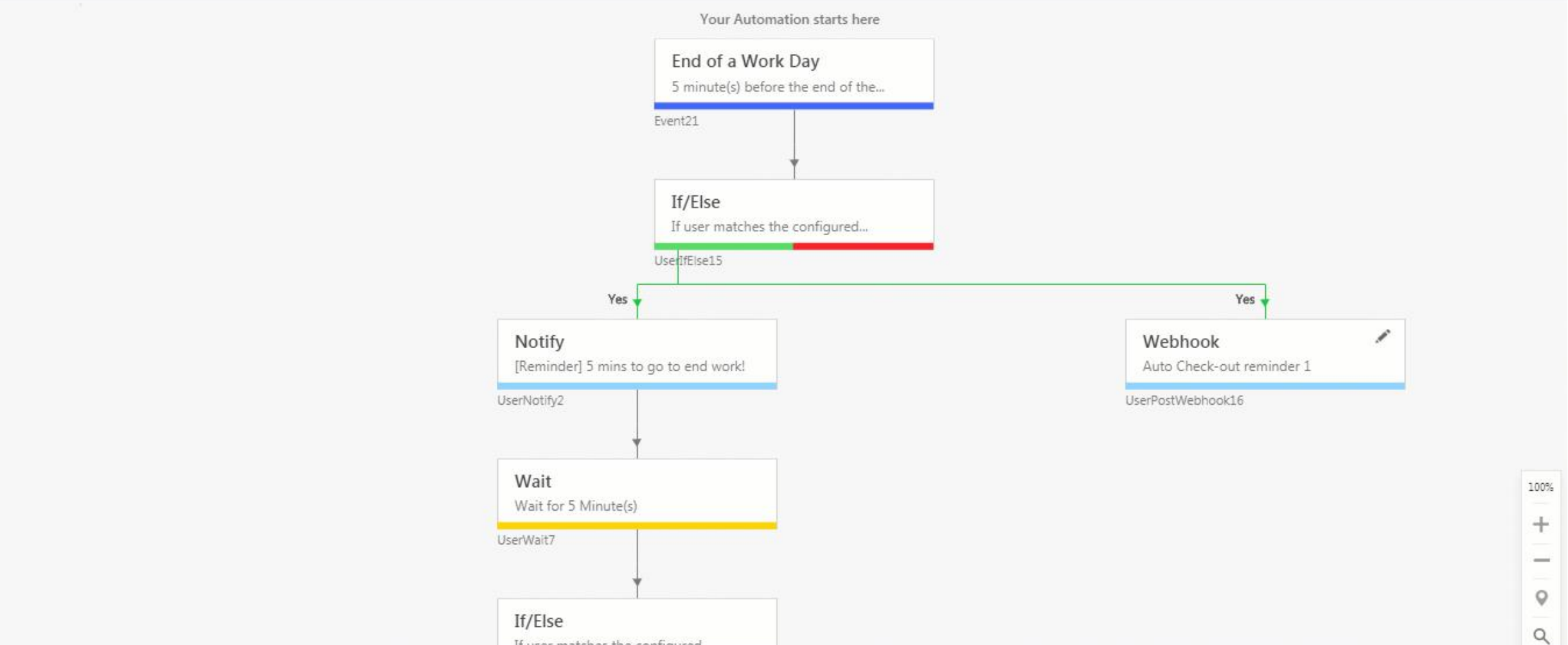
Event1



Webhook

Auto Checkin Reminder

UserPostWebhook3



Automate all your repetitive tasks
like lead assignment, daily status
checks, meeting reminders, etc.,
With sales automation



TRACK SALES PRODUCTIVITY WITH LEADSQUARED REPORTS

You can [create dashlets](#) on your dashboard to monitor productivity metrics like the number of activities being posted, tasks being completed and lead conversions. You can also monitor these metrics through [LeadSquared reports](#).

Sales performance report



Kirk Hammer

42 Meetings

19 Tasks

\$21k Revenue



David Hetfield

22 Meetings

8 Tasks

\$11k Revenue



Lars Ulritch

16 Meetings

8 Tasks

\$33k Revenue

Task Summary – Team wise

Group(s): 5 selected

Go

User Name	# of Tasks Added	# of Completed Tasks	# of Due Tasks	# of Overdue Tasks	# of Leads with Pending Tasks
Raman Bindra	9	0	0	9	9
Musthafa	3	0	0	3	3
nitisha	4	0	0	4	4
Aditya Sharma	3	0	0	3	3

Group-wise Lead count by Stage and Owner

Group(s): 5 selected

Go

Lead Owner	Lead	Unable to connect	Prospect	Demo Completed	Total # Leads
Aditya Sharma	3	0	0	0	3
Musthafa	0	0	0	2	2
nitisha	1	0	2	0	3
Peeyush Pavanan	0	0	5	0	5
Raman Bindra	1	1	2	0	4
Total:	5	1	9	2	17

Group-wise Lead count by Owners

Group(s): 5 selected

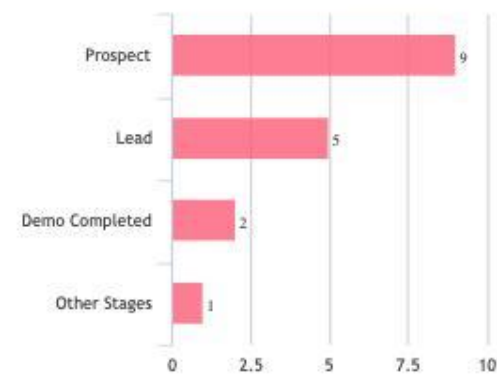
Go



Group-wise Lead count by Stages

Group(s): 5 selected

Go



Group-wise Lead Counts

Group(s): 5 selected

Go

Group Name	Total Leads	New Leads
All Members	10	10
Delhi Team	7	7
G1	7	7

Leads By All Stages

📅 Last 30 days ↺ 🔍 ✕

Stage	# of Leads	Engagement
Other Project Suspect	1	<div><div></div></div> 0.00%
Site Visit Scheduled	2	<div><div></div></div> 0.00%
SVD & Dropped	1	<div><div></div></div> 0.00%

Leads By Activity Owner

📅 This Month ↺ 🔍 ✕

Activity Owner	Warm	Hot	Rechurn	SVD & Dropped	Total # Leads
a1	0	0	1	0	1
a2	0	0	0	1	1
System	3	4	0	0	7
Total:	3	4	1	1	9

Team Task Summary

↺ 🔍 ✕

User Name	Overdue	Recently Completed
a2	31	0
a1	6	0
admin admin	1	0

User Productivity Summary

Lead Stage: 13 selected Filter by User(s): 118 selected

Activity Type(s): 42 selected

Activity done In date range: This Week

Leads Created In date range: This Year

Run Report [Get the Activity Log for All Users](#)

User Name	Group Name	# of Logins	# Total Leads	# Leads Contacted	# Activities Posted	# Activities Updated	# Tasks Created	# Tasks Completed
+ [redacted]		1	9	4	4	0	0	1
+ [redacted]ra		0	43	0	0	0	0	0
+ [redacted]na		0	17	0	0	0	0	0
+ [redacted]il		0	3	0	0	0	0	0
+ [redacted]N		0	1770	0	0	0	0	0

Today

► **Future Research**



[illegible]

Task Summary Report



Select Task Type(s): 12 selected ▾

Task Created: Last 10 days ▾ ▶ Run Report

User	# of Tasks				# of Distinct Leads	
User Name	# of Tasks Added	# of Completed Tasks	# of Pending Tasks	# of Overdue Tasks	# of Leads with Pending/Overdue Tasks	# of Leads with No Tasks
Ab	153	90	51	12	63	57
At	21	15	5	1	5	80
Ac	4	1	1	2	3	484
Acc 	2	1	0	1	1	90
Af	8	5	0	3	3	195
Aj 	6	2	1	3	4	1
Al	30	11	6	13	15	480

Lead Follow-up Analysis by Owners

Leads created in date range:

Today ▾

Activity time range:

Today ▾

Activity Type(s):

27 selected ▾

Do not include emails sent through LeadSquared ▾

Filter by User(s):

116 selected ▾

 Lead Stage(s):

10 selected ▾

▶ Run Report

Name	Total Leads	# Leads with Activity	# Activities	Total Leads Not Contacted
+ K. Ravi Teja	6	6	13	0
+ S. Soumya	5	5	9	0
+ B. Harsha	5	5	8	0
+ P. Divya	5	5	6	0

31. User Productivity Summary

Lead Stage: 13 selected

Filter by User(s): 121 selected

Activity Type(s): 84 selected

Activity done in date range: Last 10 days

Leads Created in date range: Last 10 days

Run Report

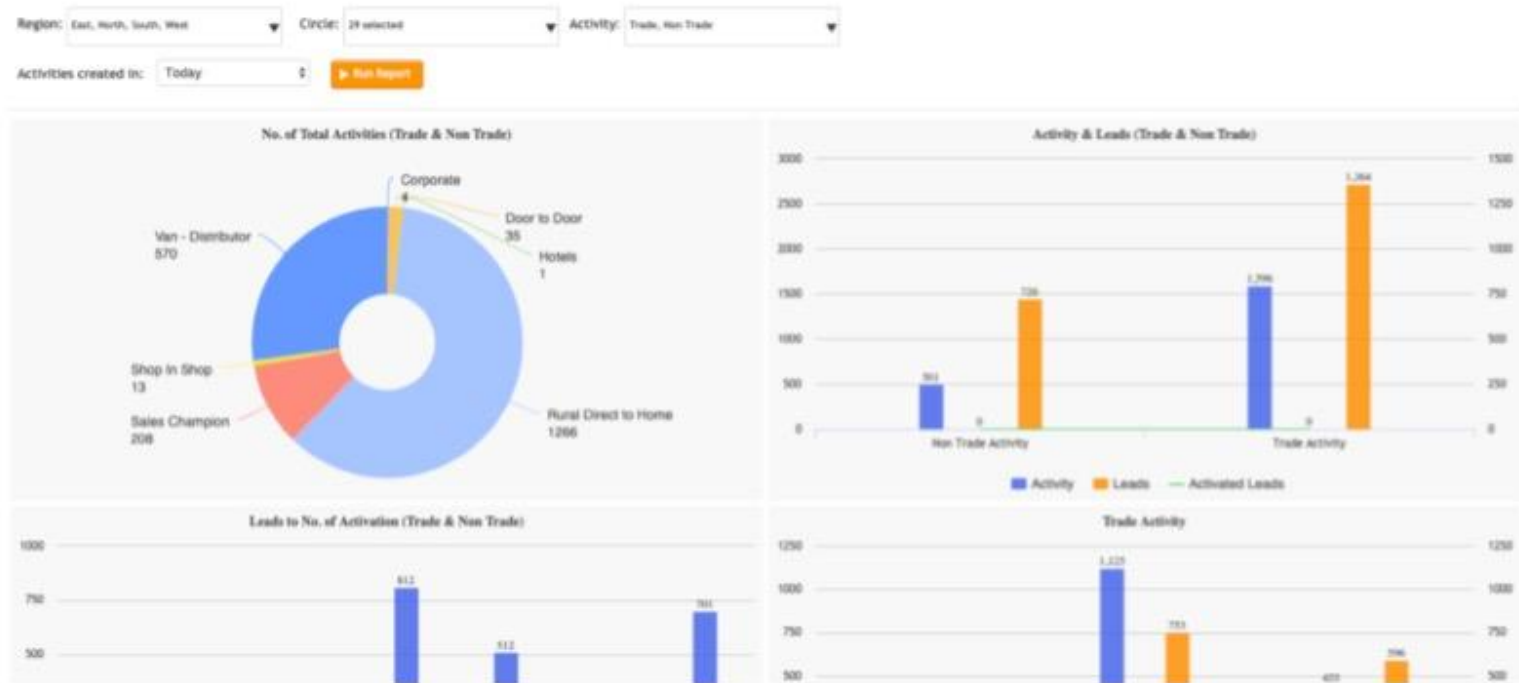
Get the Activity Log for All Users

User Name	Group Name	# of Logins	# Total Leads	# Leads Contacted	# Activities Posted	# Activities Updated	# Tasks Created	# Tasks Completed
+ Vishnu Barani	US Sales Level 1,US Sales Level 0	8	12	16	26	0	10	3
Activity break-up								
		# Leads	# New Activities		# Updated Activities			
Phone Call		1	2		0			
Outbound Phone Call Activity		6	9		0			
Email Sent		9	12		0			
Meeting (or demo) Scheduled		1	1		0			
+ Jyothirmaya Chary	South Commercial Level 0,South Commercial Level 1	29	3	3	4	0	3	2

Performance - Users

Performance - Teams

Activities and Leads Chart Report



Performance - Process
Has Computation Field
Drill Down - Process > Partners

Calls in one minute

Select Date: 2020-01-24 Start Time: 09:00:00 End Time: 20:00:00

Lead Source: 10 selected [Run Report](#)

User Name	Total Leads Assigned	Less Than One Minute	1 Min To 2 Min	2 Min To 3 Min	3 Min And More	% of Lead Called in 1 Min	Average Time for First Call
A Praveen kumar	0	0	0	0	0	0%	0
A Sherpagalingam	0	0	0	0	0	0%	0
Aakansha .	1	0	0	0	1	0%	0
Aaliya	2	0	0	0	2	0%	00 hr, 09 m, 26 s
Aarti R	1	0	0	0	1	0%	0
Abbas Dahodwala	0	0	0	0	0	0%	0
Abdul Razzaque Shaikh	0	0	0	0	0	0%	0
Abhi Bipinkumar Desai	0	0	0	0	0	0%	0
Abhijith Joseph	0	0	0	0	0	0%	0

User Performance

Process Performance

Custom Report

Has computation field

Goal Setting and tracking

Drill Down - Lead Count > Lead List

Phone Call Metrics

Leads Assigned In :

Calls Done In :

Select Users :

[Run Report](#)

Total Calls	Outbound Calls	Inbound Calls	Missed Calls	Voice Messages	Average # Calls per day
242	111	131	74	0	24

Phone calls by Users

Name	# Leads	Total # Calls	# Outbound Calls	# Inbound Calls	# Missed Calls	Had a Phone Conversation	Called, No Answer	Called, Switched Off	# Call Attempted	Call Duration	Average Duration per Call	Avg # Calls per Lead
Reporting Stratford	0	0	0	0	0	0	0	0	0	0	0	0.00
Sandeep Verma	0	0	0	0	0	0	0	0	0	0	0	0.00
Satyam Khatri	0	0	0	0	0	0	0	0	0	0	0	0.00
Shiv Kumar	0	0	0	0	0	0	0	0	0	0	0	0.00
Shubham Goit	0	0	0	0	0	0	0	0	0	0	0	0.00
Simran Makkar	1	0	0	0	0	0	0	0	0	0	0	0.00
System	363	122	1	126	24	0	0	0	1	00 hr, 42 m, 39 s	00 hr, 00 m, 20 s	0.00
Tamanna Girdhar	0	0	0	0	0	0	0	0	0	0	0	0.00
Tanuja Sehgal	0	0	0	0	0	0	0	0	0	0	0	0.00
Varoushika Sah	236	115	110	5	0	24	184	19	332	06 hr, 34 m, 24 s	00 hr, 03 m, 25 s	1.43

User Performance

Process Performance

Custom Report

Has computation field

Goal Setting and tracking

Drill Down - Lead Count > Lead List

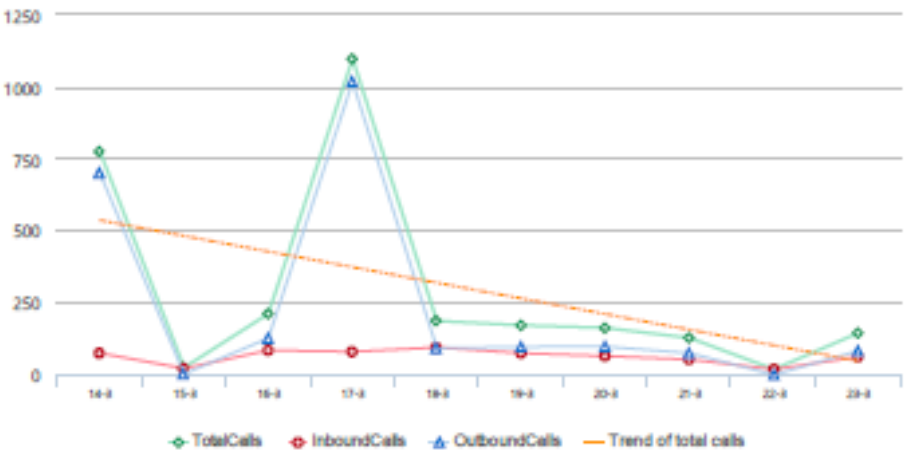
Has Cumulative Stats as well

Phone Call Metrics by Users

Total Calls	Outbound Calls	Inbound Calls	Answered Calls	Not Answered Calls	Missed Calls	Voice Messages	Average # Calls per day
145	83	62	83	37	19	6	145

Phone calls by time period

Show data by: [Change](#)



Phone calls by Users

Name	Total # Calls	# Outbound Calls	# Inbound Calls	# Answered Calls	# Not Answered Calls	# Missed Calls	# Voice Messages	Call Duration	Average Duration per Call
Bharath V	21	14	7	17	4	0	0	00 hr, 22 m, 48 s	00 hr, 01 m, 05 s
Kruthi Changappa	29	21	8	18	11	0	0	00 hr, 31 m, 15 s	00 hr, 01 m, 04 s

TABLE

FILTERS (6)



Lead Stages	Lead Count
Prospect	8
Demo Completed	2
Total	10

TABLE

FILTERS (6)



Tasks Added	COMPLETED T...	DUE TASKS	OVERDU
23	5	1	1

User Name	# of Tasks Added	# of Completed Tasks	# of Due
ayan	1	0	0
Bhavna Venkatraman	2	0	1
Devyani	2	2	0
Musthafa	3	0	0
Nishit Rao	1	0	0
nitisha	2	0	0
Pratyush Gupta	1	1	0
Puru	5	1	0
Raman Bindra	3	0	0
Tarun	2	1	0
Tarun Sreethar	1	0	0

TABLE

FILTERS (2)



Please note: Only recent 1000 records are shown in this report

UserName	Activity	Source	Location
Tarun Sreethar	Check-in	Automation	
Tarun Sreethar	Check-out	WebApp	
Praveen	Check-in	Automation	
Tarun Sreethar	Check-in	Automation	
Tarun Sreethar	Check-out	WebApp	
Praveen	Check-out	WebApp	
Tarun Sreethar	Check-in	Automation	
Tarun Sreethar	Check-out	WebApp	
ayan	Check-in	Automation	
	Check-out	WebApp	

TABLE

FILTERS (9)



Owner	Lead Stages	Lead Age	(No Value
Musthafa	Demo Completed	82	0
nitisha	Prospect	144	1
	Prospect	147	1
Peeyush Pavanan	Prospect	147	2
	Prospect	129	1
	Prospect	144	1
Raman Bindra	Prospect	144	1
	Prospect	147	1
Total			8

STREAMLINE YOUR SALES PROCESS WITH SMART VIEWS

Setting up [Smart Views](#) and subscribing to their scheduled reports will also help you with daily insights.

FRESH LEADS

24

FOLLOW UP TODAY




31

FOLLOW UP OVERDUE




















0

INTERESTED

10

<input type="checkbox"/>	Lead Name	Lead Score	Lead Stage	Owner	Modified On
<input type="checkbox"/>	<div> John Doe</div>	23	Customer	Shibani	15/11/2018
<input type="checkbox"/>	<div> Arbaaz jawed</div>	18	Prospect	Delshya	27/09/2018
<input type="checkbox"/>	<div> Jane Smith</div>	5	Customer	Divya	03/01/2018

Smart Views

<input checked="" type="checkbox"/> All Pending Tasks 28 Details	 All Delhi Leads 0							
	<input type="text" value="Search Tasks"/>		<div>All Time<div></div></div>	<div>Pending and Ov...<div></div></div>	<div>Me (Vir Singh)<div></div></div>	<div>Classic List View<div></div></div>	<div>Calendar View<div></div></div>	
<div><div>≡ Actions<div></div></div><div>DayWeekMonth</div></div>								
<input type="checkbox"/> Task Id	Subject	Status	Due Date ↑	Reminder	Created By	Task Owner	Actions	
<input type="checkbox"/> T11	Meeting:  Alex Grey	Overdue	12/04/17 07:30 PM	15 mins	Vir Singh	Vir Singh		
<input type="checkbox"/> T10	Meeting:  Francis Smith	Overdue	12/04/17 08:30 PM	15 mins	Vir Singh	Vir Singh		
<input type="checkbox"/> T13	Phone Call: Paul McCartney  Paul McCartney	Overdue	12/06/17 08:15 PM	None	Vir Singh	Vir Singh		
<input type="checkbox"/> T15	Follow-Up: John Claude  John Claude	Overdue	12/11/17 05:13 PM	15 mins	Vir Singh	Vir Singh		
<input type="checkbox"/> T16	Follow-Up:  bobdoe@example.com	Overdue	12/18/17 12:44 PM	15 mins	Vir Singh	Vir Singh		
<input type="checkbox"/> T14	Meeting: John Lennon  John Lennon	Overdue	12/20/17 06:15 PM	15 mins	Vir Singh	Vir Singh		
<input type="checkbox"/> T17	Follow-Up: Call  Neil Tyson	Overdue	12/20/17 08:00 PM	15 mins	Vir Singh	Vir Singh		
<input type="checkbox"/>	Smith	Overdue	02/06/18 01:35 PM	15 mins	Vir Singh	Vir Singh		

Collapse Panel 

+ Create Task



 Soft Phone

Smith

☑ My tasks

Details

👤 Followup

👤 Unable to Connect...

👤 My rescheduled de...

👤 My New Lead

👤 Incorrect numbers

> ▾

🔍 Search Tasks

Today ▾

Pending ▾

My Tasks ▾

Classic List View

Calendar View

Smart Views ? 🔔

📶 Document Pending

Details

3

📶 Partial Document Upload...

0

📶 Document Uploaded

1

📶 KYC Rejected

0

📶 KYC Verified

0

> 🔄 ▾

🔍 Search Activities

Any Stage ▾

Any Status ▾

Any Owner ▾

Activity Date ▾

All Time ▾

⌵ Actions ▾

👤 Trained & Inactive

Details

👤 Trained & Not Yet Active

👤 Delayed Training & Inactive

👤 Delayed Training &NotYetAc...

👤 Active Churned

⋮

📶 My Leads

87

☑ My Meetings

Hide

131

☑ My Follow-Ups

...

📶 Fact Find Sheet

...

👤 Follow-Up Leads

...

> 🔄 ▾ ✕

My Meetings

Last modified by System on 02/20/20 11:24 AM

Meeting task scheduled for today

Task Type Is "Meeting"

Tasks

Classic List View

Calendar View

Search Tasks 

Day

Week

Month

Collapse Panel 

3 Task Types selected

All Statuses

Flecinca

Today

< February 2020 >

 Upcoming (0)  Overdue (0)  Completed (1)

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23

+ Create Task

To-do List for Me (System)

> Earlier

✓ Today

Nothing left for today! [Create a To-do](#)

> Later this week

> Later

• 11 AM Meeting +...

SAFEGUARD DATA WITH THESE OPTIONS

- Set up [Two-Factor Authentication](#)
- [Permission Templates](#)
- [Force log-out all](#)



Set up Two-Factor Authentication to add an additional security layer.

leadsquared

UK

DASHBOARD

CONTENT

MARKETING

LEADS

WORKFLOW

APPS

REPORTS

Admin Panel

Add Dashlets

Leads by Owner

Last 60 Days

Page 1 of 3

Lead Owner	Prospect	Opportunity	Customer	Nouvetta	LeadStage	LeadStage234
Caprika3	23	0	0	0	1	1
nitish	3	0	1	0	0	0
arnika	9	0	3	0	0	0
ashmit	13	0	15	0	0	5
sales user	14	0	2	0	0	0
am test deepi	451	92	205	0	0	14
TOTAL:	1324	114	383	2	1	122

Leads by Sources

Last 30 Days

Unknown 715

[Other Values] 98

Leads by Stages

Stage # of Leads Engagement

Prospect 1325 ~ 0.08%



Verify OTP

OTP has been sent to your Mobile

Resend OTP (04:56)

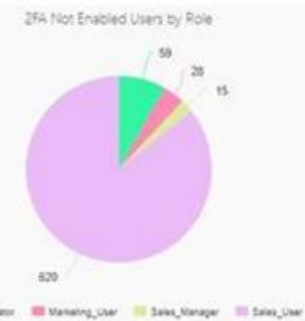
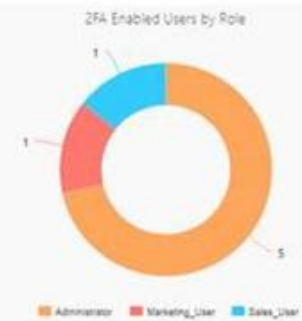
Verify

LeadSquared works best with Chrome and Firefox browsers.



Two Factor Authentication

7 2FA Enabled Users
722 2FA Not Enabled Users



List of 2FA Enabled Users (7)

List of 2FA Not Enabled Users (722)

User Name	Email Address	Role	Phone	Enabled On	Enabled By	Provider
Kiran Mally		Marketing_User		16-May-2019 19:54	Kiran Mally	Email
Kiran.Marketx		Administrator		16-Apr-2019 19:55	Kiran.Marketx	Email
Kiranmaly/ 電子郵件協助測試 \$inourapuasess		Administrator		16-Apr-2019 19:14	Kiranmaly/ 電子郵件協助測試 \$inourapuasess	SMS
sahaja Boora3996		Administrator		27-May-2019 19:41	sahaja Boora3996	Email
Rajat Gupta		Administrator		24-May-2019 18:56	Rajat Gupta	SMS

Edit your [Permission Templates](#) to disable data exports or temporarily hide sensitive data from users.

User Access ⓘ
☒ All Users ☐ Sales Group Users

Restrict Access
Accounts ☒ Allowed
Custom Apps ☒ Allowed
Dashboard ☒ Allowed
API Access ⓘ ☒ Allowed
Reports ☒ Allowed
Call Recordings ☒ Allowed

Assign Permissions:

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

☐ Not Allowed ☒ Partially Allowed ☒ Allowed ☐ Not Applicable

KEY LEADSQUARED FEATURES FOR DIFFERENT SECTORS

Finance	Education	Real Estate	Healthcare	Others
Customer Portal	Integrated Cloud Calling Solution for students and sales agents	Integrated Video Calling (coming soon) for showcasing a property	A Powerful Contact Center Solution	A Powerful Contact Center Solution
eKYC	Video Calling (coming soon) for interviews, online counselling, classes	Integration with third party real estate platforms	Attendance Management of Healthcare professionals	Workflows, Alerts and Reminders
TAT & Escalation	Integration with third party education platforms	Integrating calendar, email and office systems to increase productivity	Prescription Generation	Bulk email, campaigns and templates to stay in communication
Digital Document Collection	Student application portal	Workflows, Alerts and Reminders	Integration with Hospital Information System(HIS)	Integrated Cloud Calling Solution to your leads/prospects
Field force management	An integrated calendar, email and office system	Bulk email, campaigns and templates to stay in communication with leads/prospects	Easy and Faster On-boarding of Doctors and Suppliers	Integration with third party platforms



THANK YOU

Please do write to us about how you would like us to help you in the current situation and which features can help you to make WFH better and enhance user experience.

Write to us at supportwfh@leadsquared.com