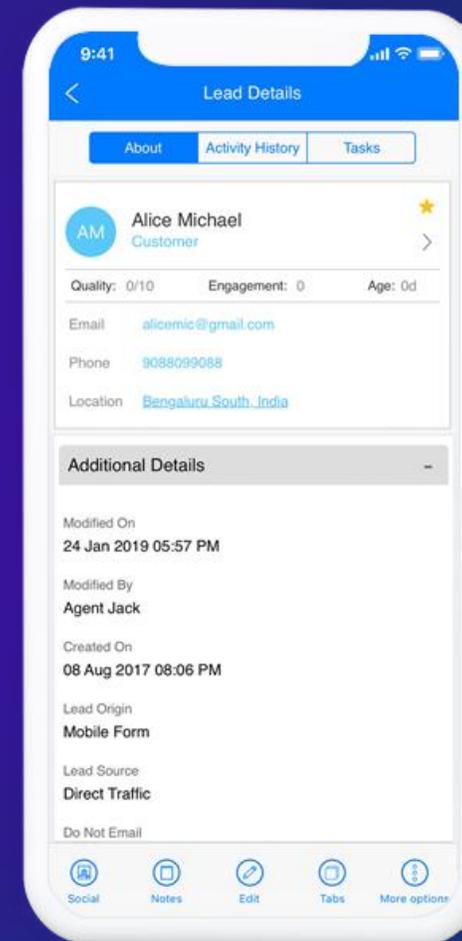


Check-in Check-out: Everything you need to know

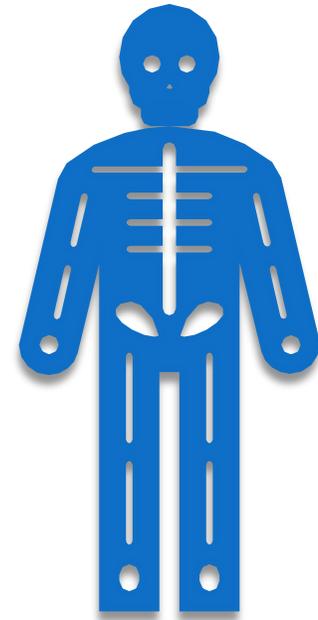
WITH BALA SRIKANTH REDDY

 leadsquared
WEBINAR



Check-in Check-out What's it about?

- ▶ We created the Check-In/Check-Out feature with one goal in mind – Transparency.
- ▶ Now you 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.



Steps to set it up

Navigate to My Account>Settings>Users and Permissions>User Availability>User Check-In.
Click the slider alongside 'User Check-In'.

1 Next, click the **Configure** button.



Administrator Dashboard ✔ 💬

[+ Add Dashlets](#)

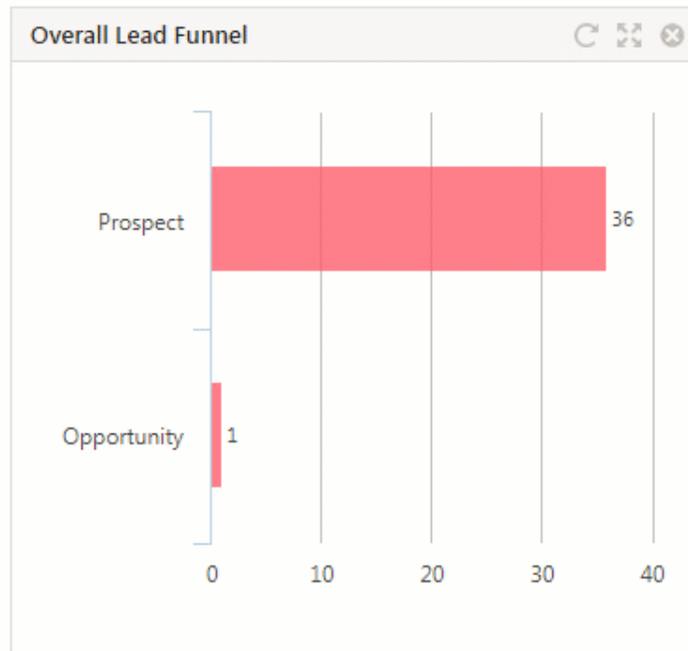
Key Lead Metrics 📅 Last 30 Days 🔄 🗄️ ✕

Last 30 Days

New Leads	Engagement	Active Leads
5	20%	100%

Overall

Total Leads	Engagement	Active Leads
41	2%	90%



Recently Sent Email Campaigns 🔄 🗄️ ✕

Campaign Name	Recipients	Open	Click
Email Campaign 07	2	0.00%	0.00%
Email Campaign 01	1	0.00%	0.00%

Top Landing Pages 📅 Last 30 Days 🔄 🗄️ ✕

Page Name	Submits	Conversion
-----------	---------	------------

Top New Leads 📅 Last 10 Days 🔄 🗄️ ✕

Name	Lead Source	Lead Score
------	-------------	------------

Email Summary 📅 Last 30 Days 🔄 🗄️ ✕



To configure at the roles level...

1

Configure User Check-in Feature

Configure at Group OR Role level.



Roles



Groups

Cancel

Next

To configure at the groups level...

1

Configure User Check-in Feature



Configure at Group OR Role level.



Roles



Groups



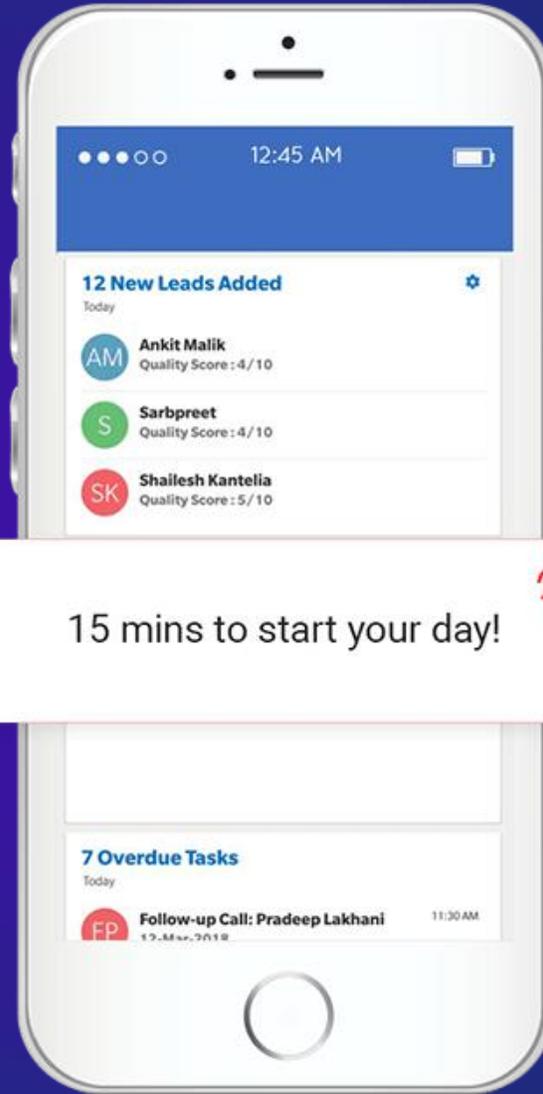
Cancel

Next

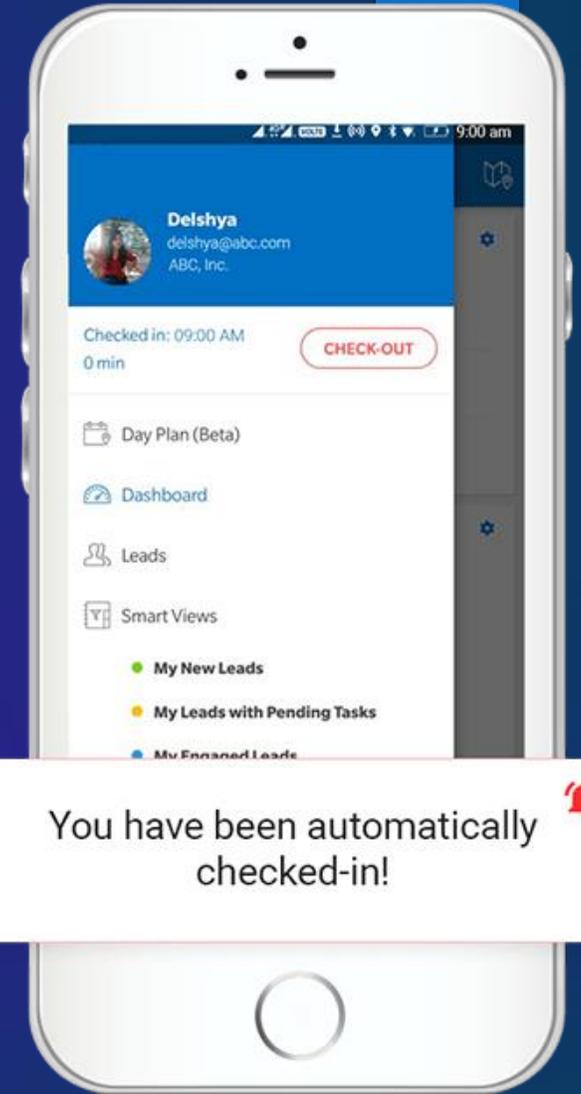
Checking In and Out

TRACK ATTENDANCE WITH CHECK-IN CHECK-OUT

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



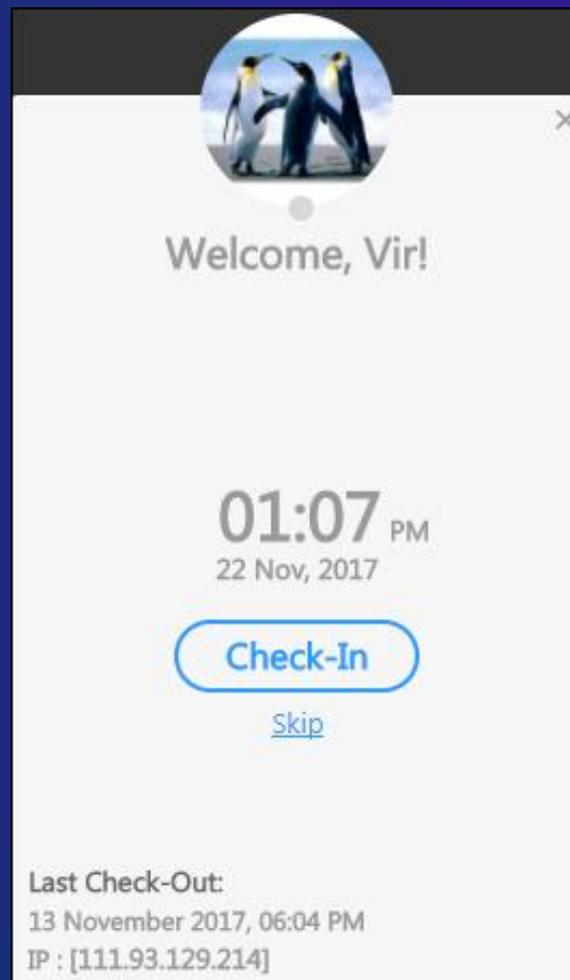
15 mins to start your day!



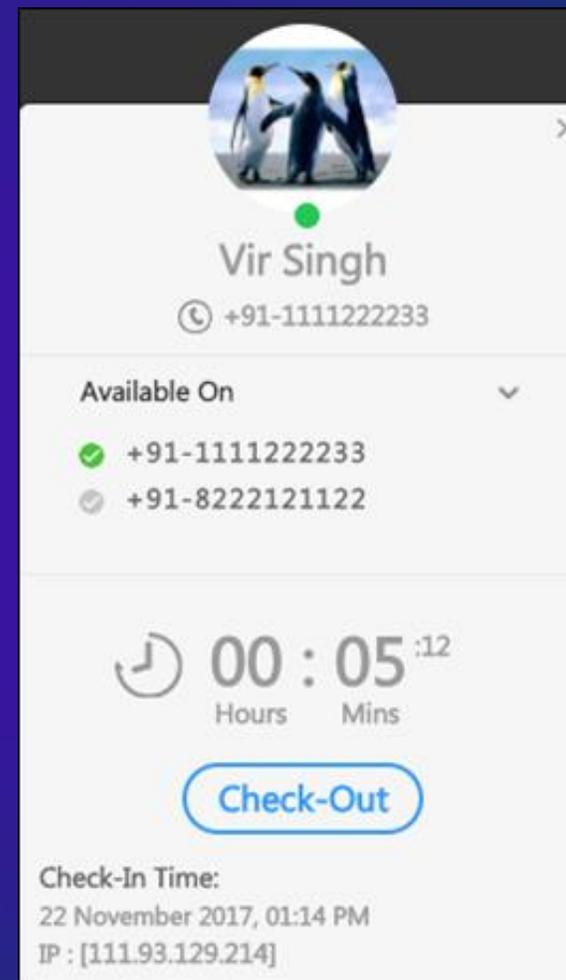
You have been automatically checked-in!



All users you enabled the feature for will now see this pop-up when they log in to the LeadSquared web or mobile app. Once in, users can change their availability status (Online/Away/Offline), the phone number they are available on, and also check out.

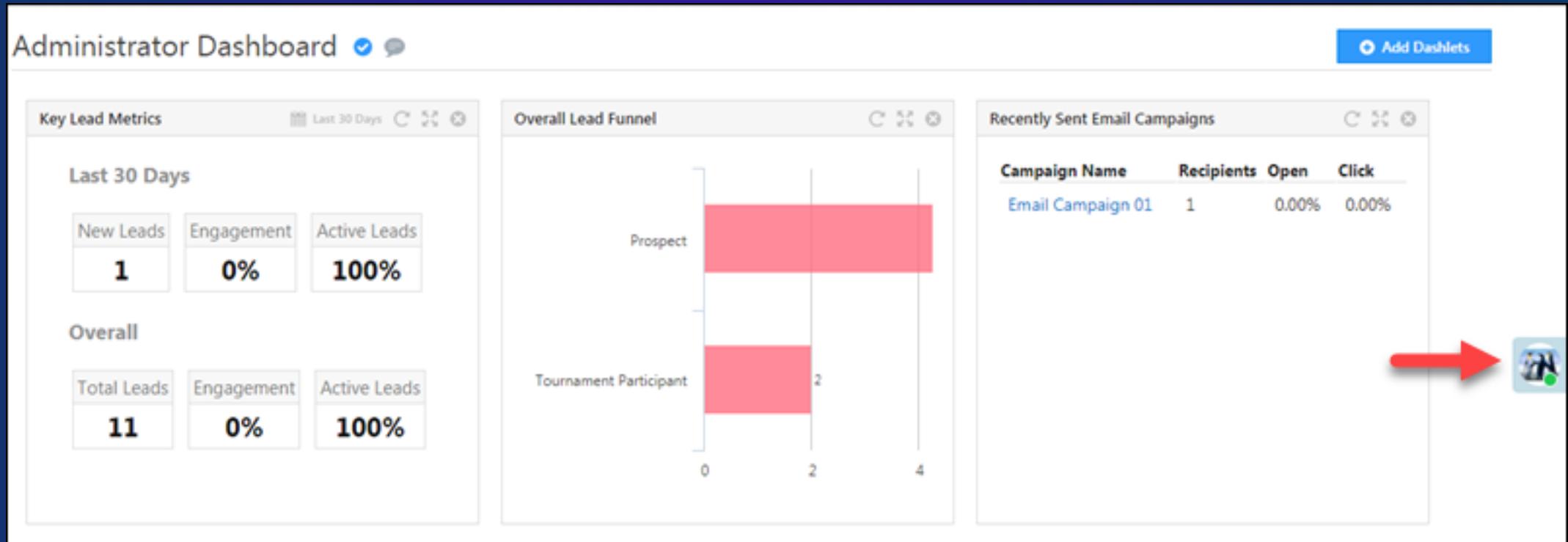


A screenshot of a mobile app login pop-up. At the top is a circular profile picture of three penguins. Below it, the text reads "Welcome, Vir!". The current time is displayed as "01:07 PM" on "22 Nov, 2017". There are two buttons: a blue "Check-In" button and a blue "Skip" link. At the bottom, it shows "Last Check-Out: 13 November 2017, 06:04 PM" and "IP : [111.93.129.214]".



A screenshot of a mobile app user profile pop-up. At the top is a circular profile picture of three penguins. Below it, the name "Vir Singh" is displayed, followed by a phone number "+91-1111222233" with a clock icon. There is a section titled "Available On" with a dropdown arrow, containing two phone numbers: "+91-1111222233" with a green checkmark and "+91-8222121122" with a grey clock icon. Below this is a timer showing "00 : 05 :12" with "Hours" and "Mins" labels. There is a blue "Check-Out" button. At the bottom, it shows "Check-In Time: 22 November 2017, 01:14 PM" and "IP : [111.93.129.214]".

Users can choose to **Check-In** if say they have started their work for the day or **Skip** if say it's a holiday but they just wanted to quickly check on their leads.



Auto Check-In/Check- Out for Mobile

If you want to set up notifications/reminders and auto check-in/check-out on your LeadSquared mobile app, you have to configure webhooks

The screenshot displays the LeadSquared Administrator Dashboard. At the top, there is a navigation bar with the LeadSquared logo and menu items: DASHBOARD, CONTENT, MARKETING, LEADS, APPS, and REPORTS. On the right side of the navigation bar are icons for search, notifications (with a red badge), help, and user profile. Below the navigation bar, the page title is "Administrator Dashboard" with a checkmark and a chat icon. A blue button labeled "Add Dashlets" is located in the top right corner.

The dashboard contains several dashlets:

- Daily Lead Addition:** A line chart showing lead addition over the last 30 days. The y-axis ranges from -2.5 to 7.5. There is a significant spike to approximately 7.5 on April 16th, followed by a sharp decline. A smaller spike is visible on May 7th. A red dashed trend line is also present.
- Drip Campaign Summary:** A table showing the performance of a drip campaign.

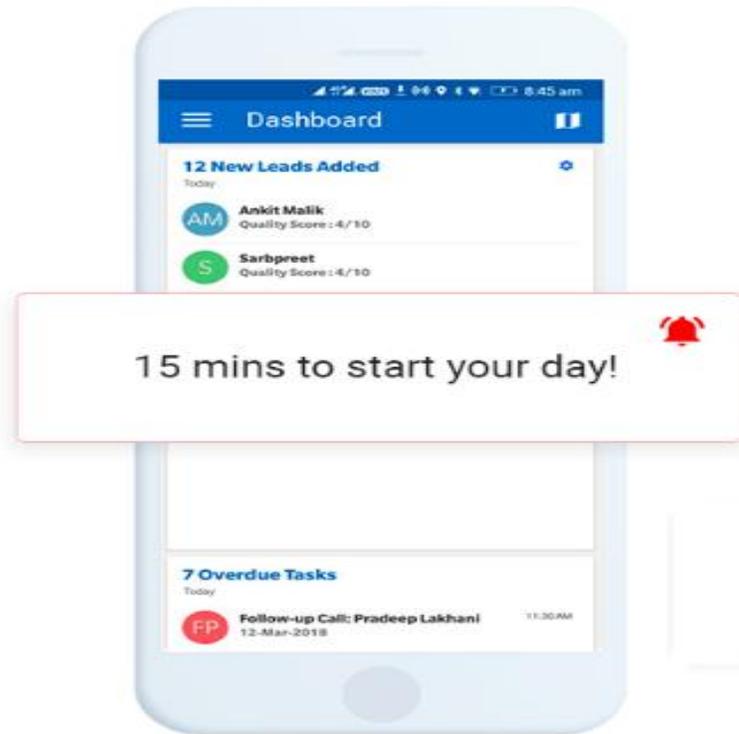
Name	Leads Processed	Email Count
Test Audit	3	4

At the bottom of the dashboard, there are three more dashlets:

- Email Opens by day:** A bar chart showing email opens. A bar for a specific day is highlighted with a value of 48.1.
- Email Opens by device:** A partially visible chart showing email opens broken down by device.
- Key Lead Metrics:** A section titled "Last 30 Days" with three buttons: "New Leads", "Engagement", and "Active Leads".

In the bottom right corner, there is a blue chat icon.

Check-in / Check-out



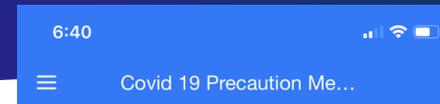
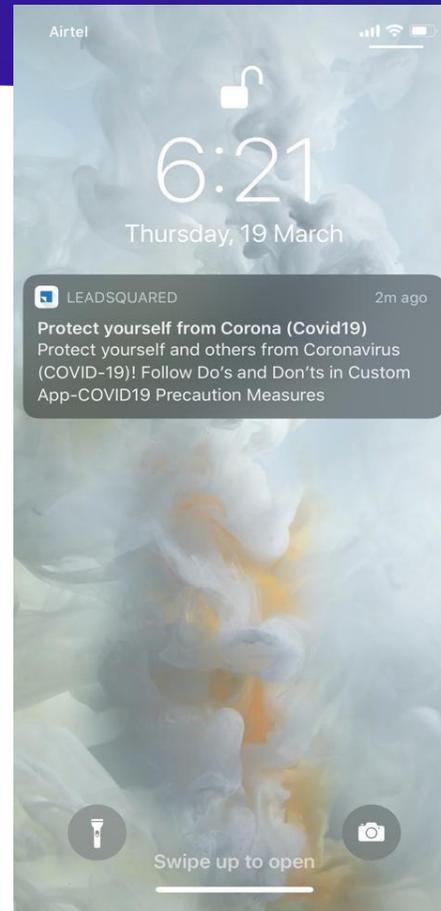
Auto check in and check out

Ensure that your field team starts their day on time by automatically checking them in. Set workday templates for your agents to define when their work starts and ends.

You can send reminders to your sales team that their work-days are about to start. If they haven't checked in, the app will do it automatically for them.

Mobile Notifications and Templates

- 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.



Take steps to protect yourself



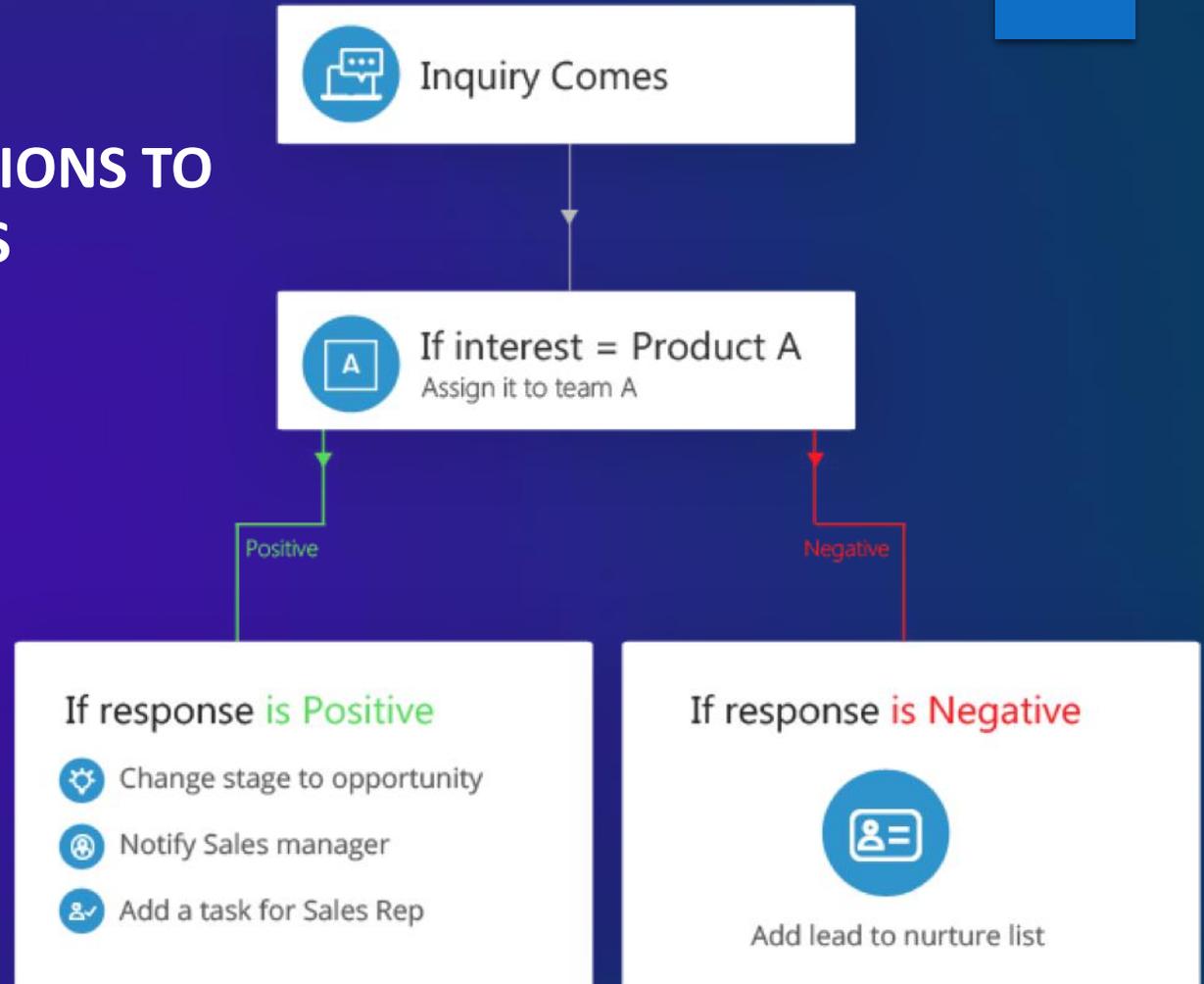
Clean your hands often

- Wash your hands often with soap and water for at least 20 seconds especially after you have been in a public place, or after blowing your nose, coughing, or sneezing.
- If soap and water are not readily available, use a hand sanitizer that contains at least 60% alcohol. Cover all surfaces of your hands and rub them together until they feel dry.

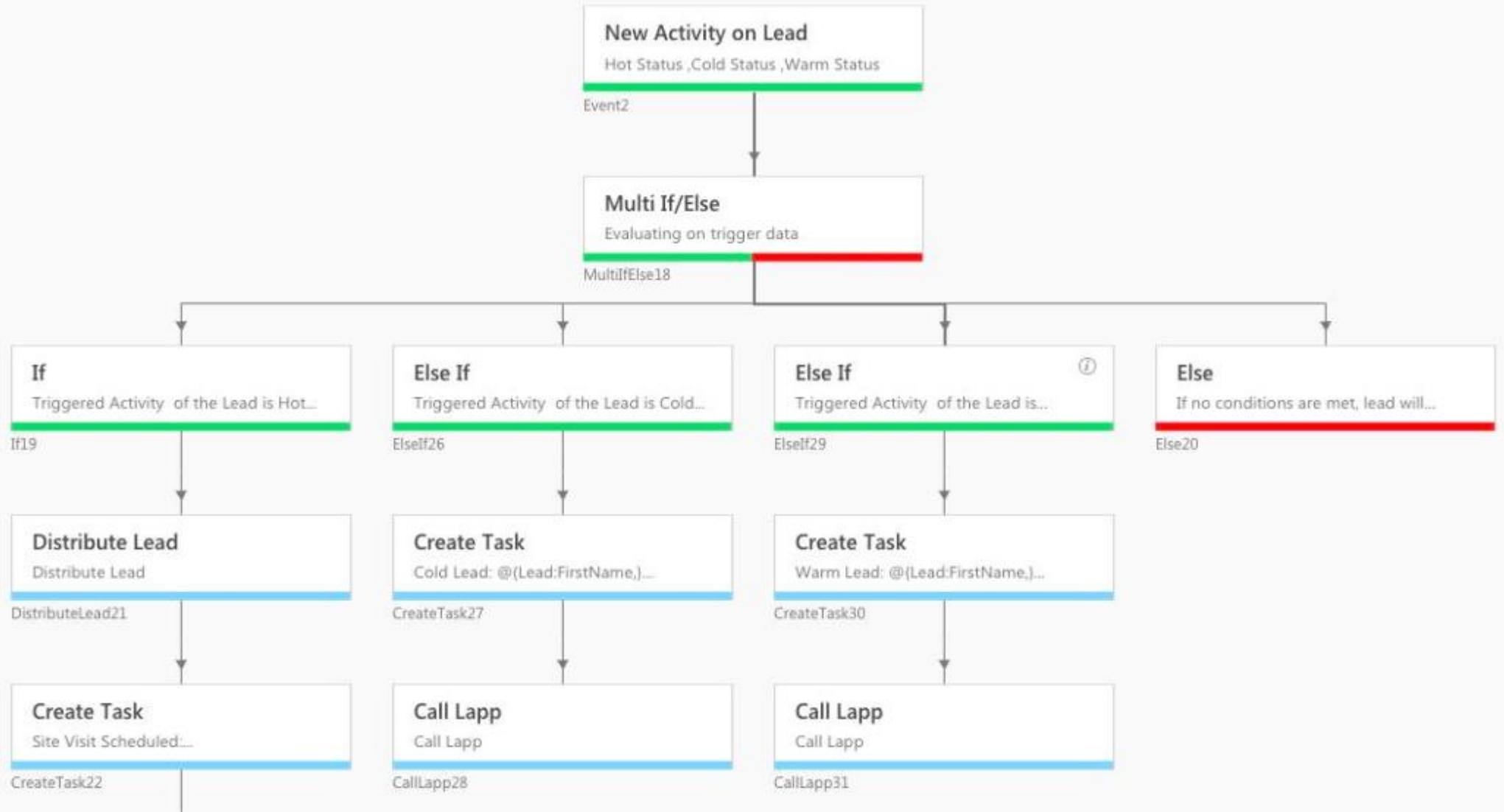


AUTOMATE TASKS & SALES NOTIFICATIONS TO TRACK USER ACTIVITY & ESCALATIONS

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



Your Automation starts here

New Lead
Trigger: when lead is created

Event1

Multi If/Else
Evaluating on best data

MultiIfElse2

If
Lead Status is Interested

If1

Update Lead
Update Lead Field(s) - Lead Stage

UpdateLead13

Create Task
On-boarding Task...

CreateTask27

Else If
Lead Status is Follow up

ElseIf6

Update Lead
Update Lead Field(s) - Lead Stage

UpdateLead14

Create Task
Follow-up @LeadFirstName...

CreateTask28

Else If
Rework is Yes

ElseIf20

Create Task
Revisit Task for Rework...

CreateTask31

Else If
Lead Status is Existing UPA Merchant...

ElseIf11

Update Lead
Update Lead Field(s) - Lead Stage

UpdateLead17

Create Task
On-boarding Task...

CreateTask32

Else If
Lead Status is Not Interested

ElseIf15

Update Lead
Update Lead Field(s) - Lead Stage

UpdateLead18

Create Task
Existing Pay Merchant Task...

CreateTask29

Else If
Lead Status is Existing Pay Merchant

ElseIf11

Update Lead
Update Lead Field(s) - Lead Stage

UpdateLead22

Create Task
Existing Pay Merchant Task...

CreateTask29

Else If
Lead Status is Existing UPA Merchant...

ElseIf11

Update Lead
Update Lead Field(s) - Lead Stage

UpdateLead24

Else
If no conditions are met, lead will...

Else4

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 that day.
- The second notification goes to the manager after 48 hours.

You can set up interval and important triggers on which users should be notified.



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

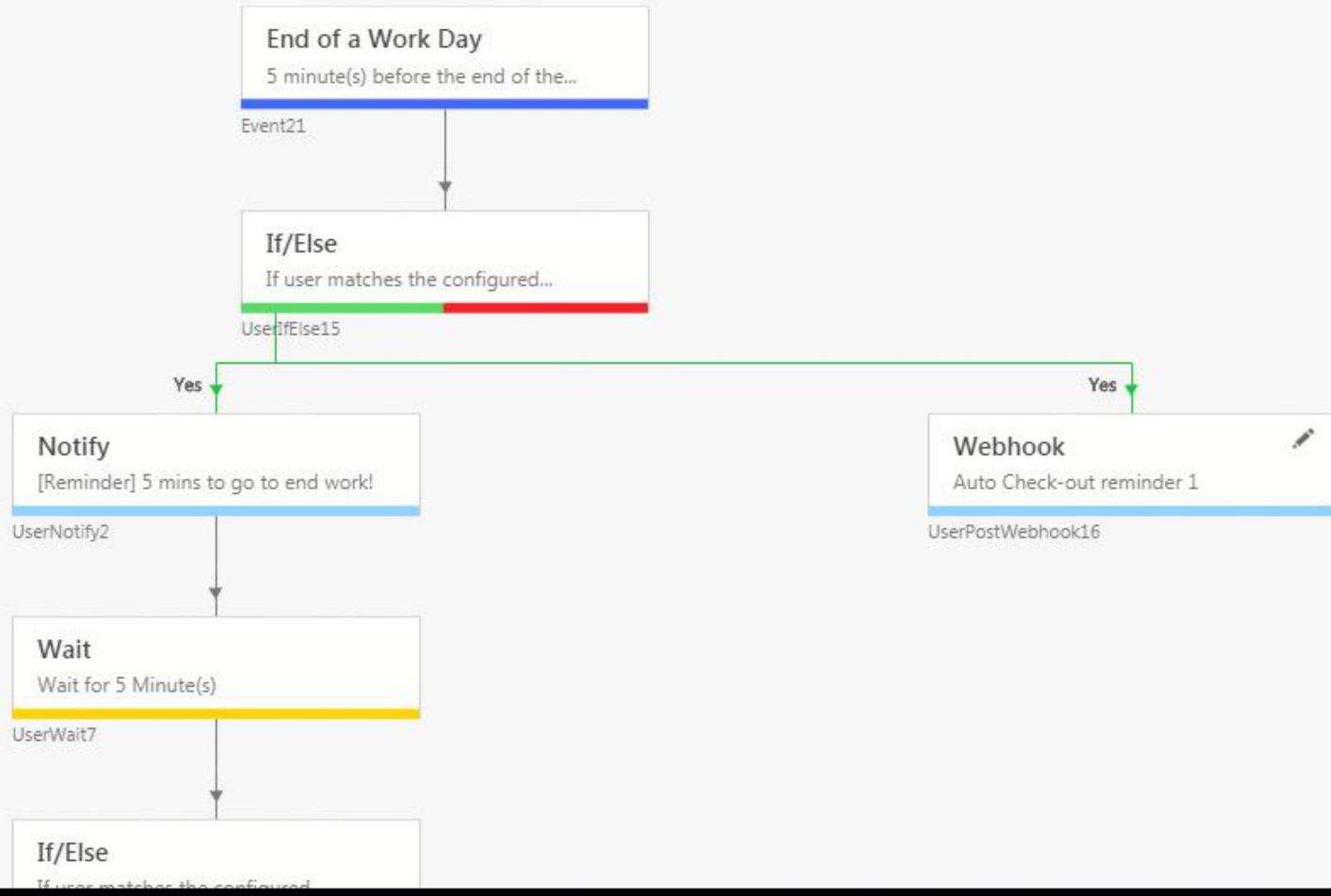
Event1

Webhook

Auto Checkin Reminder

UserPostWebhook3

Your Automation starts here



100%

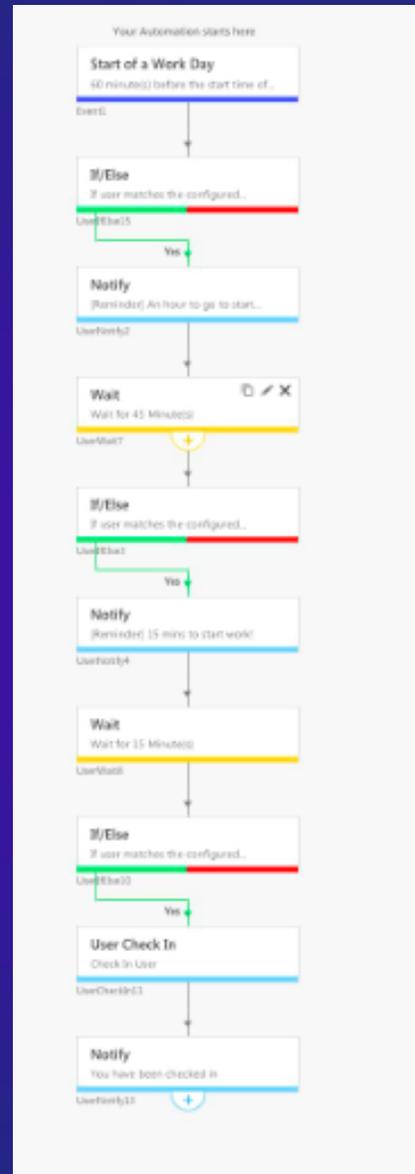
+

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○

🔍

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

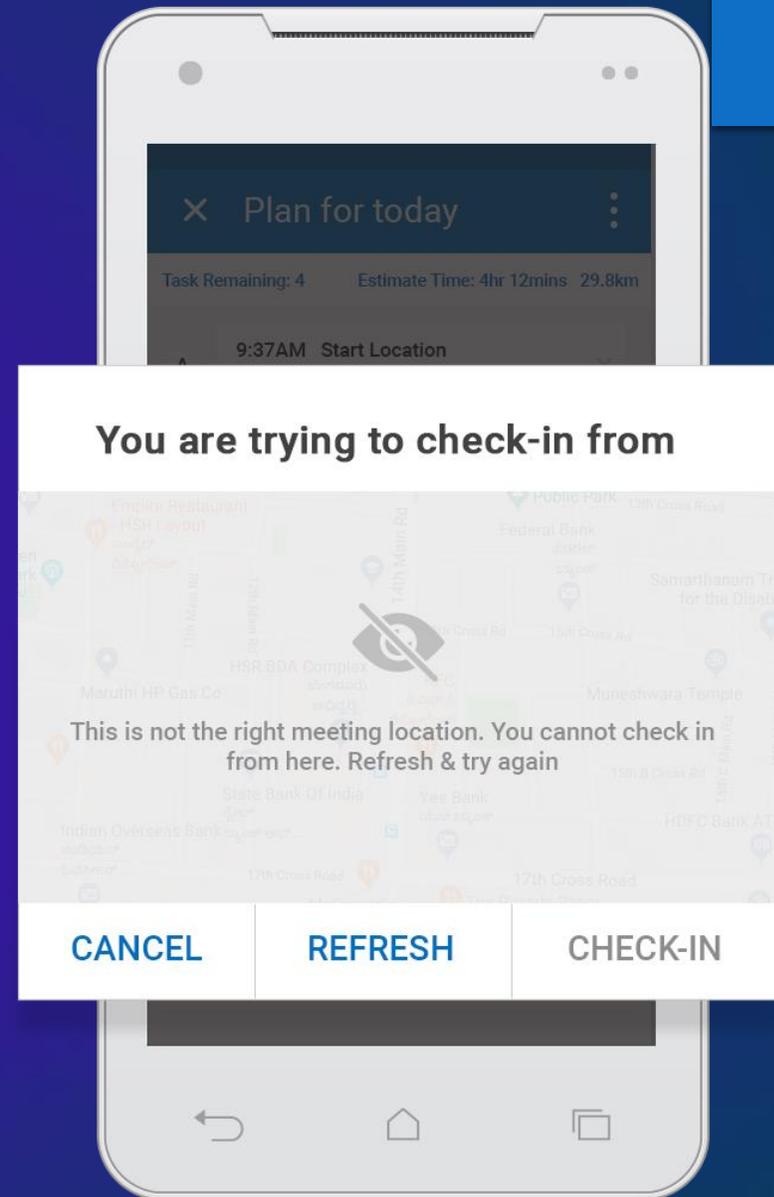


Setting up location
restrictions, time
restrictions, geo-fencing

You can restrict users from checking-in and checking-out from the mobile app based on location and time preferences. The feature is available on both Android and iOS.

- Allow users to check-in/out within a defined radius around a particular latitude and longitude.
- Prevent users from checking-in/out before a certain time or before a certain duration.
- Use combinations of location and time to meet nuances use cases.

Using these features, you can enable your users to check-in/out from their specific office locations at the appropriate office timings.



You can set location restrictions (latitude, longitude, and radius), time restrictions (duration, specific time) or a combination of both. The restrictions are applied on the basis of defined user custom fields.

Location Restrictions

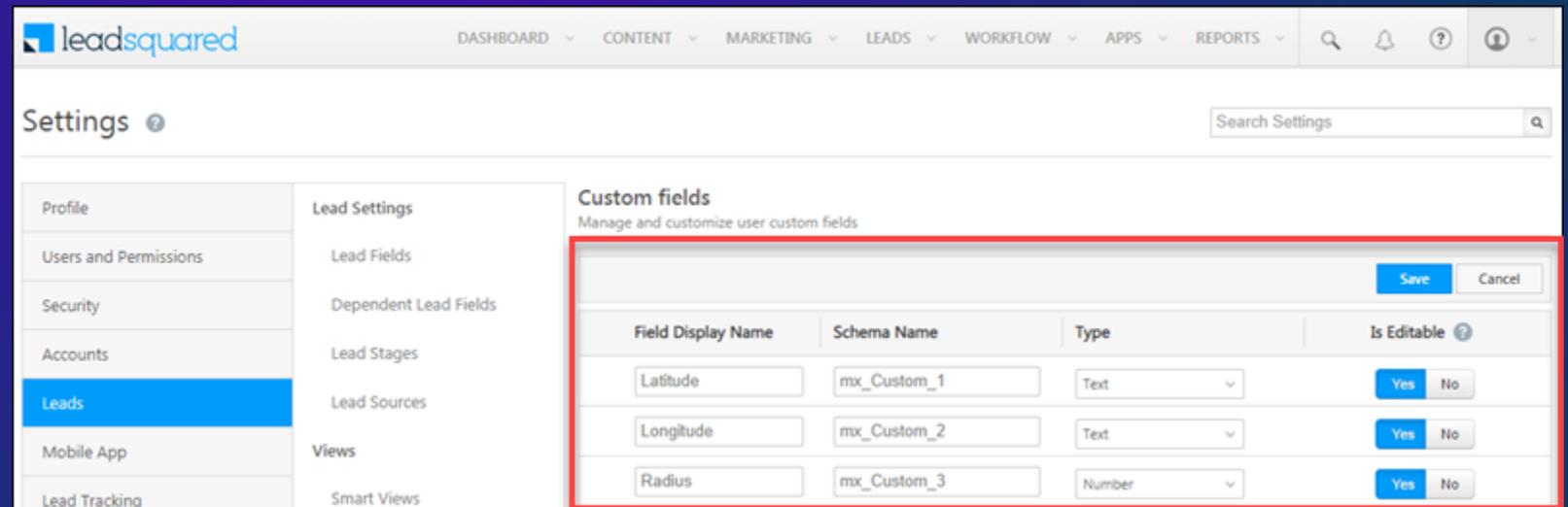
All location restrictions are user-specific. They can be applied in one of two ways –

- **Lat-Long-Radius geo-fencing**
- **ZipCode geo-fencing**

Time Restrictions

Time restrictions can either be user-specific or a general setting implemented for all users. They can be applied as any one or as a combination of both

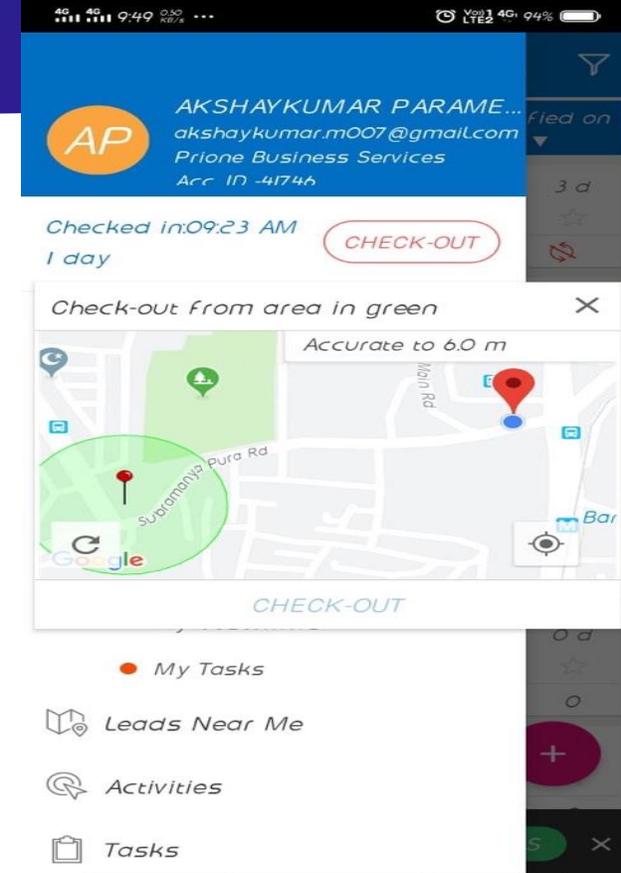
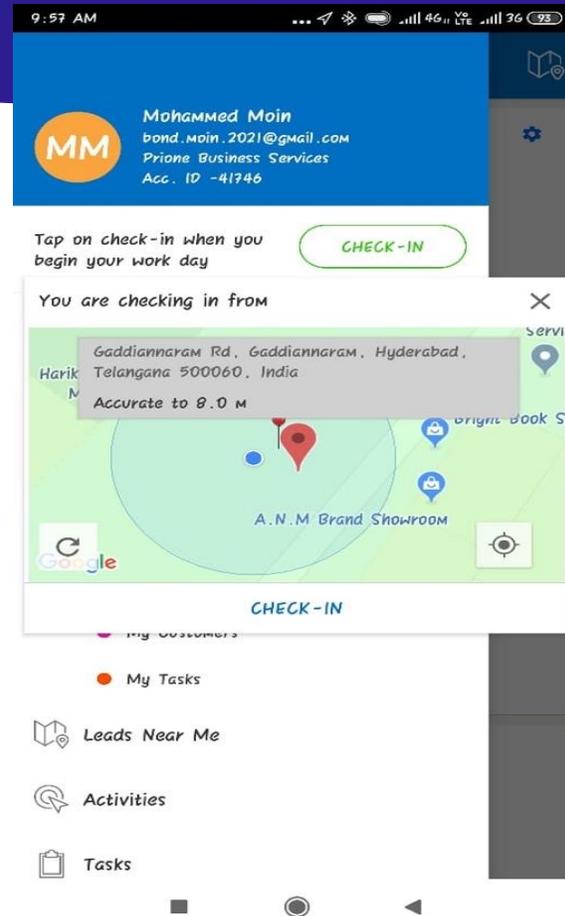
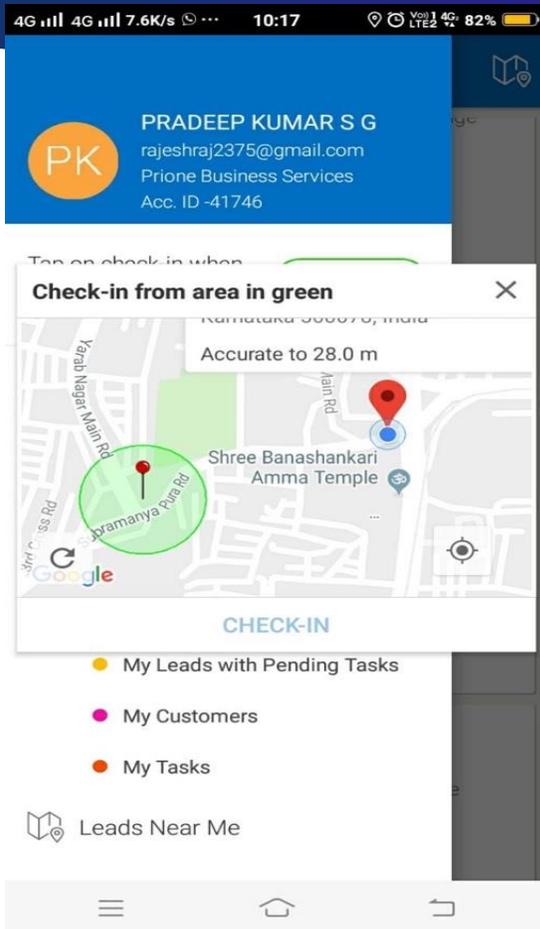
- **Duration**
- **Fixed Time**



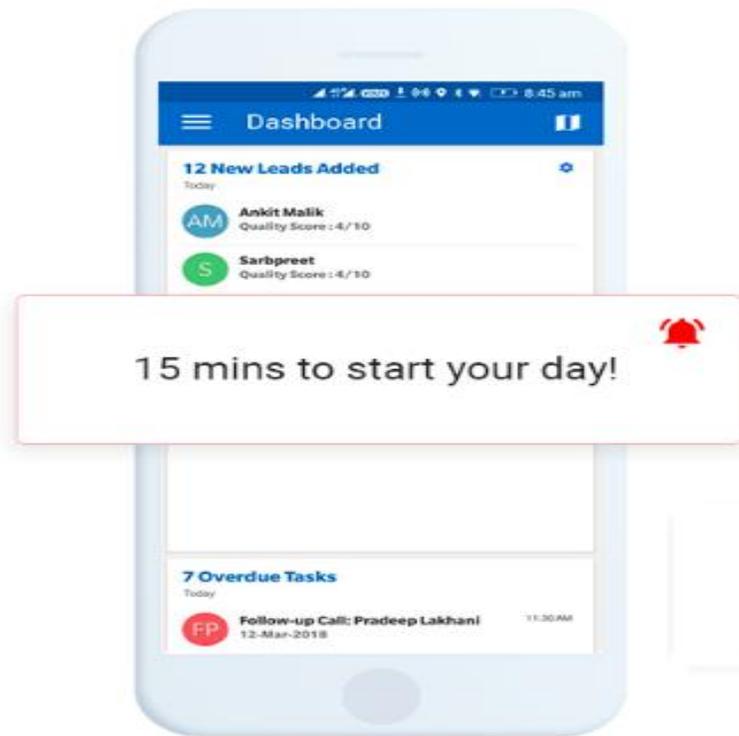
The screenshot shows the Leadsquared Settings interface. The 'Leads' section is selected in the left sidebar. The 'Custom fields' section is active, displaying a table of user-defined custom fields. The table has four columns: Field Display Name, Schema Name, Type, and Is Editable. Three custom fields are listed: Latitude (Text), Longitude (Text), and Radius (Number). Each field has a 'Yes' button for 'Is Editable' and a 'No' button. A 'Save' button and a 'Cancel' button are located at the top right of the table area.

Field Display Name	Schema Name	Type	Is Editable
Latitude	mx_Custom_1	Text	Yes No
Longitude	mx_Custom_2	Text	Yes No
Radius	mx_Custom_3	Number	Yes No

Check-in / Checkout



Check-in / Checkout



Auto check in and check out

Ensure that your field team starts their day on time by automatically checking them in. Set workday templates for your agents to define when their work starts and ends.

You can send reminders to your sales team that their work-days are about to start. If they haven't checked in, the app will do it automatically for them.

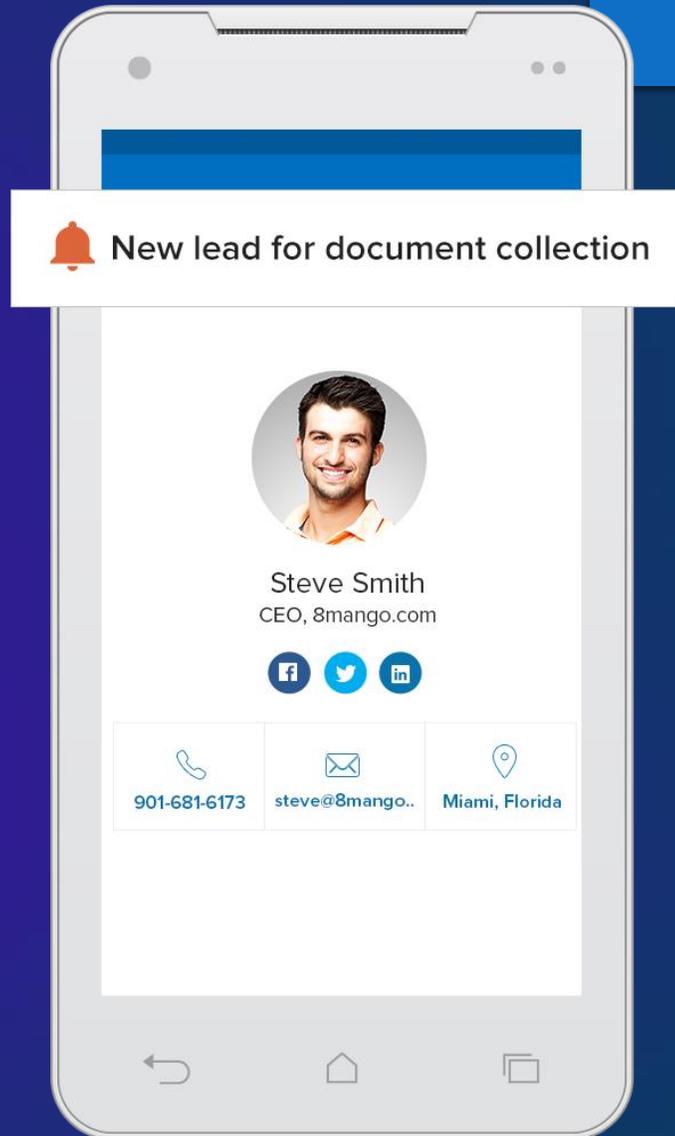
Lead Distribution

5

Auto-allocate leads and tasks

Allocate leads based on advanced distribution logic:

- Agent availability



The distribute lead action allows you to set conditions to distribute leads among your users. Let's say you want to distribute all leads only to the checked-in users.

Distribute Lead ? ×

Lead entering will be distributed in a round robin manner

Rule 1 ^

If *choose condition(s)*  then assign lead to/based on ▼ *Choose users and assignment order*

[+ New Rule](#)

Set Default Rule: When none of the above rules match the lead, assign to ▼

Evaluate on latest data

Cancel

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

Distribute Lead ?

Lead entering will be distributed in a round robin manner

Rule 1

If *City is Bangalore*

then assign lead to/based on Users *Choose users and assignment order*

- Users
- Groups
- User Properties

+ New Rule

Set Default Rule: When none of the above rules match the lead, assign to Bob Doe

Evaluate on latest data

Cancel Save

Select Users

Lead will be distributed amongst selected users in a round robin manner.

Users

Type here to search

- Jack Doe
- John Doe
- Vir Singh

Distribution Sequence

Type here to search

- Frank Doe
- Bob Doe

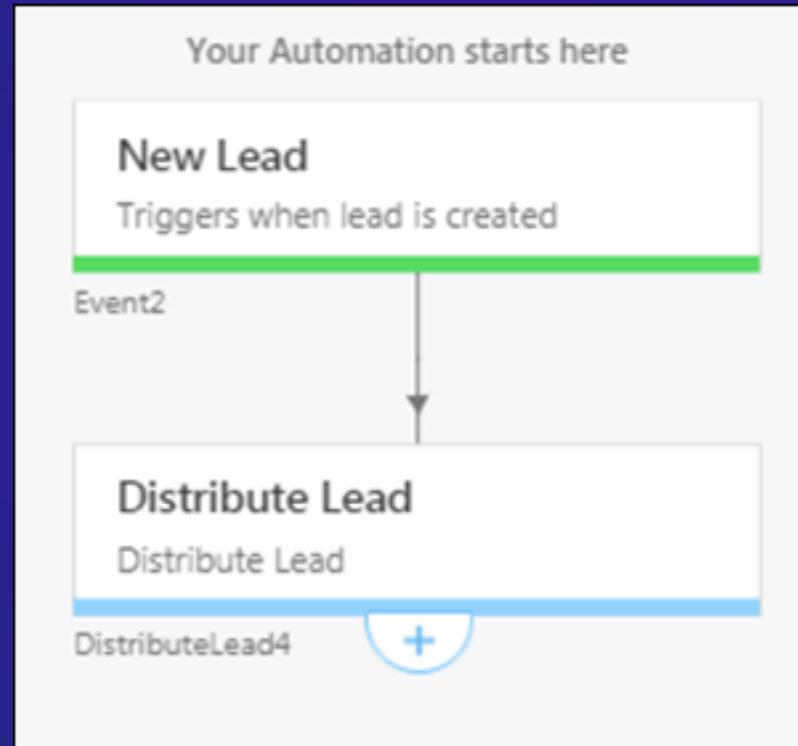
Availability Status

Distribute leads amongst All Available users in the distribution sequence i.e.

Leads will be distributed amongst all users in the distribution sequence, irrespective of their Availability Status.

Cancel Save

The distribute lead action allows you to set conditions to distribute leads among your users. Let's say you want to distribute all leads from a certain city to specific users.



Tenant Creation

New Tenant Creation

- ▶ Allow Users to Add/Edit/Delete Leads, Tasks and Activities only after checking-in The setting needs to be enabled from the backend, only then will this check be enabled.
- ▶ Without Checking-in
 - ▶ The user will only be able to view data on the application
 - ▶ User will not be able to Add/Edit/Delete Leads, Tasks and Activities
 - ▶ When the user tries to do the above functions, the check-in dialog will open.
- ▶ After Checking-in
 - ▶ Users journey will be the same as the existing app flow
- ▶ The feature is available on both iOS and Android

Distributing Leads based on User Properties

Navigation: DASHBOARD | CONTENT | MARKETING | LEADS | APPS | **REPORTS** | Search | Notifications (4) | Help | Profile

Administrator Dashboard

[Add Dashlets](#)

Key Lead Metrics

Last 30 Days

New Leads	Engagement	Active Leads
1	0%	100%

Overall

Total Leads	Engagement	Active Leads
11	0%	100%

Overall Lead Funnel

Prospect	9
Tournament Participant	2

Recently Sent Email Campaigns

Campaign Name	Click
Email Campaign 0	0.00%

Reports Menu

- Reports Home - View reports and analytics
- My Favourite Reports - View your favourite reports
- My Saved Reports - View your saved reports



Reporting

You can also use the User Login History report.

Reports > Administrative Reports > User Login History

Search Reports

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 Kitchennoid 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
	s.d.h.naqvi@gmail.com	Check-in	MobileApp	Sant Shri Baba Nagpalji Marg, Lado Sarai, New Delhi, Delhi. 55 m from Chhatterpur Pahari Bus Stop pin-110030 (India)	02-Mar-2020 10:09
	s.d.h.naqvi@gmail.com	Check-out	Automation	2, Tajpur Road, Badarpur Extension, New Delhi, Delhi. 8 m from Sharvesh Bike Repairing Centre pin-110044 (India)	02-Mar-2020 13:30

5:02

Check-in and Check-ou...

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	

5:05

Task Summary

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

5:16

Group-wise Lead Distri...

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

5:14

Group-wise Lead Distri...

TABLE FILTERS (6)

Lead Stages	Lead Count
Prospect	8
Demo Completed	2
Total	10

Distributing Leads based on User Properties

The screenshot displays an Administrator Dashboard with a navigation bar at the top containing 'DASHBOARD', 'CONTENT', 'MARKETING', 'LEADS', 'APPS', and 'REPORTS'. The 'REPORTS' menu is open, showing options: 'Reports Home', 'My Favourite Reports', and 'My Saved Reports'. A blue 'Add Dashlets' button is visible on the right. The dashboard is divided into three main sections:

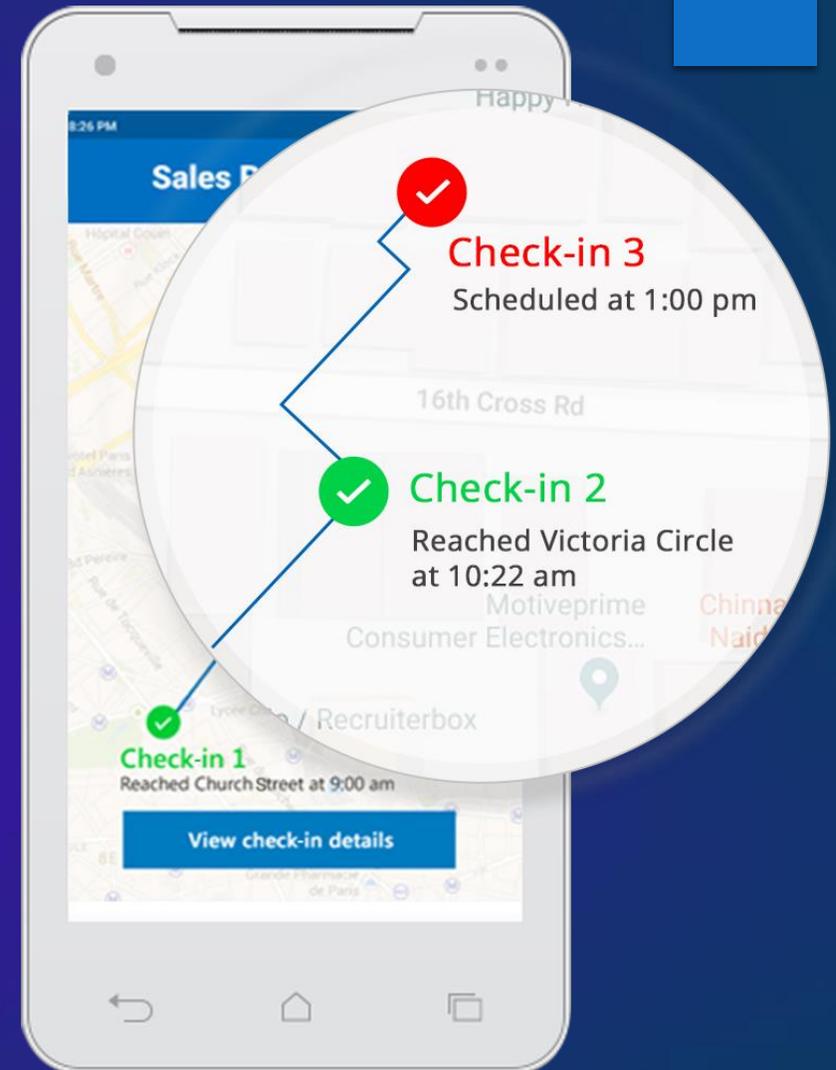
- Key Lead Metrics:** A summary card for the 'Last 30 Days' showing 1 New Lead, 0% Engagement, and 100% Active Leads. An 'Overall' summary shows 11 Total Leads, 0% Engagement, and 100% Active Leads.
- Overall Lead Funnel:** A horizontal bar chart showing 9 Prospects and 2 Tournament Participants.
- Recently Sent Email Campaigns:** A table with columns for Campaign Name, Click, and other metrics. One entry is visible: 'Email Campaign 0' with a Click rate of 0.00%.

Campaign Name	Click
Email Campaign 0	0.00%

Track everything your agents do

Don't let your teams slack

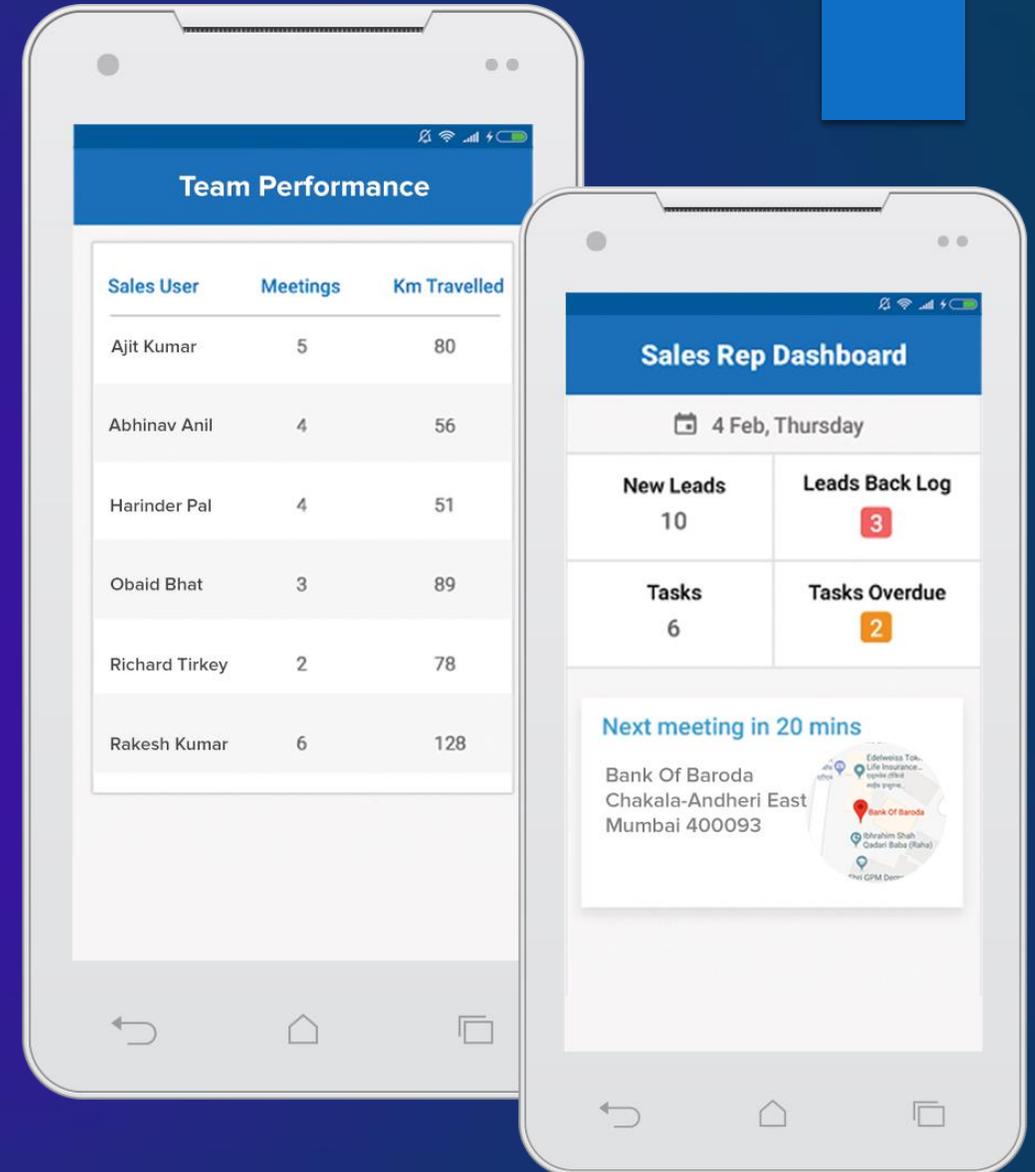
- Auto check-ins for agents
- Real-time geo-tracking to validate meetings
- Geo-fencing, so that no meeting is misrepresented ever again (Activity won't get posted till the agent reaches the meeting location)
- Track all conversations & activities – calls, SMSs, emails, meetings etc.



Get complete performance reports

Insights to move from hindsight to foresight

Get all the key insights into your field teams' performance, including the meetings done, branches visited, distance travelled, completed & pending task summary, location history & much more. Dashboards for different users, teams & hierarchy levels are completely customizable.





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