LeadSquared
Product Updates

Sneha Chowdhary
Admins + Sales
Managers & Users
**Trigger Automations based on Task Actions**

- On Task Creation
- On Task Completion
- On a Task Reminder

**Personalize Automated Tasks**

- Mail merge lead data in the description to provide more context
- Merge activity date fields to book appointments at specific times & schedule for users

**Group Level Automations**

- Admins & Sales Group Managers can build automations just for Leads specific to certain groups

Admins + Marketing
Data Protection: Cookie Consent
- On all Webpages & landing pages tracked by LeadSquared
- Will show up only if enabled

Data Protection: Do not track
- On all Webpages & landing pages tracked by LeadSquared
- Will show up only if enabled

Leave Tracker for Manager
- Track & Apply for leaves for your Sales Group Users

Learn more on GDPR  https://www.leadsquared.com/gdpr/
General Update to Benefit Everybody
Activities: Back the changes in an Activity

- Enable “Change logs” in Activities you want to track the history off
- View the changes with respect to certain fields

Activities: Quick add them

- Enable from the Settings -> Any custom activity you want to quick add
Reports you can benefit from

- **Group-wise Lead Stage Transition Analysis** - Similar to the Lead stage transition analysis, except according to groups where users can select the groups they have access to and see how they’re leads are converting and access these from there - Carry out actions?
- You can have the ability to choosing ‘No group as well’ to see leads of users who do not belong to any group as well if you’re an Admins or Sales Manager
- **Time taken to win a customer** -
  - Lead Created date - Date the lead was captured by the System through a visit or click or email based on any unique key
  - Customer closure date is the difference between when they entered the system and when their last stage was changed
- **Users Attendance Analysis** - Calculates according to the Check-in & check-out history and shows the distance
- **Lead Import Summary** - ExtraMarks - Do multiple bulk imports daily, want to know how many new leads are created/added with each import and how many duplicates have come out
- **Large Exportable reports** - Not real time - depending on amount of data it can take 2-3 hours