Product Updates
Made to deliver higher sales & marketing productivity
What we will cover

- Advance Search for Accounts – ESS Tenants
- Smart Views - Configurations
- New Data Type – Dependent Account Fields
- Account Activities
- Account Access & Permissions
- Account Automation
- Task Management – Feature Updates
Advance Search for Accounts – Now available for Clients using ESS

Advance search for accounts helps you in filtering a list of accounts which satisfy multiple criteria. For example, you just want to see the accounts which are at risk, belong to a particular industry and owned by specific sales rep.
Smart Views feature of LeadSquared is now extend to Accounts as well. Users can create different tabs for account types along with various filters.
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 which are relevant to them.
Smart Views for Admin - Setting up Smart Views for different teams

Create Smart View 🌟

Name *

Add Account, Lead, Activity or Task type tabs to your Smart View!

+ Create Tabs

Cancel  Save
Account Fields – New Data Type

Dependent drop-down fields are now supported for Accounts. The process for creating it is the same as in case of lead and activity dependent drop-downs.
Account Activities

With Account Activities you can capture all the B2B related activities performed on various accounts. These activities help you log all your interactions and track your overall journey with a particular business partner/vendor/associate.

Process is fairly simple:

1. Create Account Specific Activity Types
2. Add Activities to Accounts
3. View added activities in Account’s Activity History
Creating an Account Activity Type

Step one is to create the activity types you require. Once you’ve created an activity type, you can add activities of that type to your accounts from the Manage Accounts or Account Details page.
Adding Activities to Account

Now that we have created account specific activity types, we can add these activities to various accounts from the Manage Accounts or Account Details pages.
Account’s Activity History

The Activity History tab of the Account Details page displays the list of all activities posted against a particular account. You can hover your cursor over an activity and click the pencil icon to edit or the delete icon to delete.

![Image of Activity History tab from the Leadsquared dashboard](image-url)
Lead Activity History on Account Details Page

In case you want to see any particular lead’s activity history which belong to a specific account you can see it from account details page itself using **Lead Activity History Tab**.
Account Activities - Webhooks & V2 APIs

Webhooks for account activities
• Account Activity Create
• Account Activity Update

V2 APIs for Account Activities - CRUD
You can post activities to an account, update the activity data, retrieve specific activities or a range of activities and also delete account activities.
Using Permission Templates feature of LeadSquared accounts can be enabled / disabled for specific user / role / group.
# Accounts – Default Access

<table>
<thead>
<tr>
<th>User Role</th>
<th>Account - View</th>
<th>Account - Modify</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>• All</td>
<td>• All</td>
</tr>
<tr>
<td>Sales Manager</td>
<td>• All</td>
<td>• All</td>
</tr>
<tr>
<td>Marketing User</td>
<td>• All</td>
<td>• All</td>
</tr>
<tr>
<td>Sales User</td>
<td>• User Owned</td>
<td>• User Owned</td>
</tr>
<tr>
<td></td>
<td>• Accounts in which at least one lead is owned</td>
<td></td>
</tr>
</tbody>
</table>
# Account Access – Sales Group – Account Based Access

<table>
<thead>
<tr>
<th>User Role</th>
<th>Account - View</th>
<th>Account - Modify</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sales User</strong></td>
<td>• User Owned</td>
<td>• User Owned</td>
</tr>
<tr>
<td></td>
<td>• Accounts in which at least one lead is owned</td>
<td></td>
</tr>
<tr>
<td><strong>Group Manager</strong></td>
<td>• User Owned</td>
<td>• User Owned</td>
</tr>
<tr>
<td>View all accounts of the group</td>
<td>• All Accounts of All Sales Users in the Group</td>
<td></td>
</tr>
<tr>
<td><strong>Group Manager</strong></td>
<td>• User Owned</td>
<td>• User Owned</td>
</tr>
<tr>
<td>Modify all accounts of the group</td>
<td>• All Accounts of All Sales Users in the Group</td>
<td></td>
</tr>
</tbody>
</table>
Account Automation – Triggers Available

When will your Automation start?

**Account Trigger**
- **New Account**
  - When a new account is created or added

**Lead Trigger**

**Activity Trigger**
- **Account Update**
  - When an account field is updated or changed

**User Trigger**

**Task Trigger**
**Account Activity Automation – Triggers Available**

<table>
<thead>
<tr>
<th>Trigger Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Trigger</td>
<td>- <strong>New Activity on Account</strong>&lt;br&gt;When an account activity is added</td>
</tr>
<tr>
<td>Lead Trigger</td>
<td></td>
</tr>
<tr>
<td>Activity Trigger</td>
<td>- <strong>Activity Update on Account</strong>&lt;br&gt;When an account activity is updated</td>
</tr>
<tr>
<td>User Trigger</td>
<td>- <strong>New Activity on Lead</strong>&lt;br&gt;Such as Form Submission, Page Visit etc.</td>
</tr>
<tr>
<td>Task Trigger</td>
<td>- <strong>Activity Update on Lead</strong>&lt;br&gt;Such as Sales Activity etc.</td>
</tr>
</tbody>
</table>
Account / Activity Automation – Actions Available

Account & Account Activity Automation now has 2 actions:

- Update Account
- Notify Account Owner
Task Management – Choose time zone while creating task

While setting task for a user in different geography, one can choose the right time zone and set the task at required time.
Tasks Management - Calendar View – Multiple users in different time zones

In case you have teams in different geographies, it becomes difficult for each team to setup task for another team in different time zone. Using this view teams can easily get to know availability of the respective user.
Calendar view now shows available & break slots as per the work day template assigned to the user.
Thank You!
We’ll see you next session.

TIPS
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