LeadSquared Reports And Analytics

Sales performance report

Kirk Hammer
42 Meetings 19 Tasks $21k Revenue

David Hetfield
22 Meetings 8 Tasks $11k Revenue

Lars Ulrich
16 Meetings 8 Tasks $33k Revenue
Topics To Be Covered

• Reports Overview
• Restriction on Reports
• Actions on Reports
• Role-Wise Reports
• User Productivity Reports
• The Reports feature of LeadSquared provides you with timely analysis of marketing, sales execution and team productivity of the organization. This analysis helps in improvising the business process to derive better results.

• LeadSquared provides relative reports to the users based on their role. So that the users are equipped with adequate reports which will help them to work effectively and efficiently.
How To Access Reports

• Every user will be able to see the tab named “Reports” in the main tab section of the LeadSquared. This holds all the user, lead and account related reports.

• Closely related reports are further clubbed together into sub-categories in reports home. Each sub-category has a name relating to the reports it holds.
Restriction On Reports

- The entire Reports tab can be restricted for the users by the admin of the account from permission templates.
Restriction On Reports

- The permissions assigned to the user on lead, activities and task levels through the permission templates respectively reflect over the reports of the users.

- On disabling the export option under permission templates, it will disable the download of the reports for the user.

- Also, the masked fields on the UI will be masked in the reports as well.
Actions On Reports

• Based on the permissions given the reports can be exported, saved and scheduled to get the report at regular intervals.

• These option are available on individual report at the right corner.

• Also you can search the reports with the key words in the search reports bar.
Role-wise Reports

- Most of the general individual reports are common among all the user roles.
- However, the sales group manager, sales manager and admin have additional reports to check with the data of the users working under them as per the hierarchy.
- Like: My revenue dashboard is available for all users, but the group wise revenue dashboard will be available to group manager, sales manager and admin.
User productivity reports are built on the user level data. These include activities and tasks done by the users on leads, amount of time spent on the leads and time spent in the application and various other aspects. On overall, it helps us to analyze the performance of the user.

This can be used by the individual user to analyze hi/her performance and make necessary improvements.

This further helps us in analyzing the performance of the entire organization.
User Productivity Reports

Reports under user productivity are:

- LeadSquared Usage Report
- User Activity Reports
- Sales and Revenue
- Sales Group-wise Analysis
- Task Summary Report
- Phone Call Metrics
Questions?