leadsquared
WEBINAR

SECURING YOUR DATA ON LEADSQUARED & PREVENTING UNAUTHORIZED ACCESS

Join 100,000 happy users growing their business with LeadSquared

DELTIN GROUP kotak Kotak Securities practo meesho olx CARS24 BYJU'S The Learning App EXIDE Life Insurance

Agenda

OVERVIEW

PREVENT UNAUTHORIZED ACCESS

CONTROL DATA ACCESS RIGHTS AND USER PERMISSIONS

SECURE YOUR LANDING PAGES

PROTECT PRIVACY OF YOUR LEADS

REVIEW AUDIT LOGS

SECURE API CALLS BEST PRACTICES

OVERVIEW

- ISO 27001:2013 certified
- HIPAA compliant
- GDPR

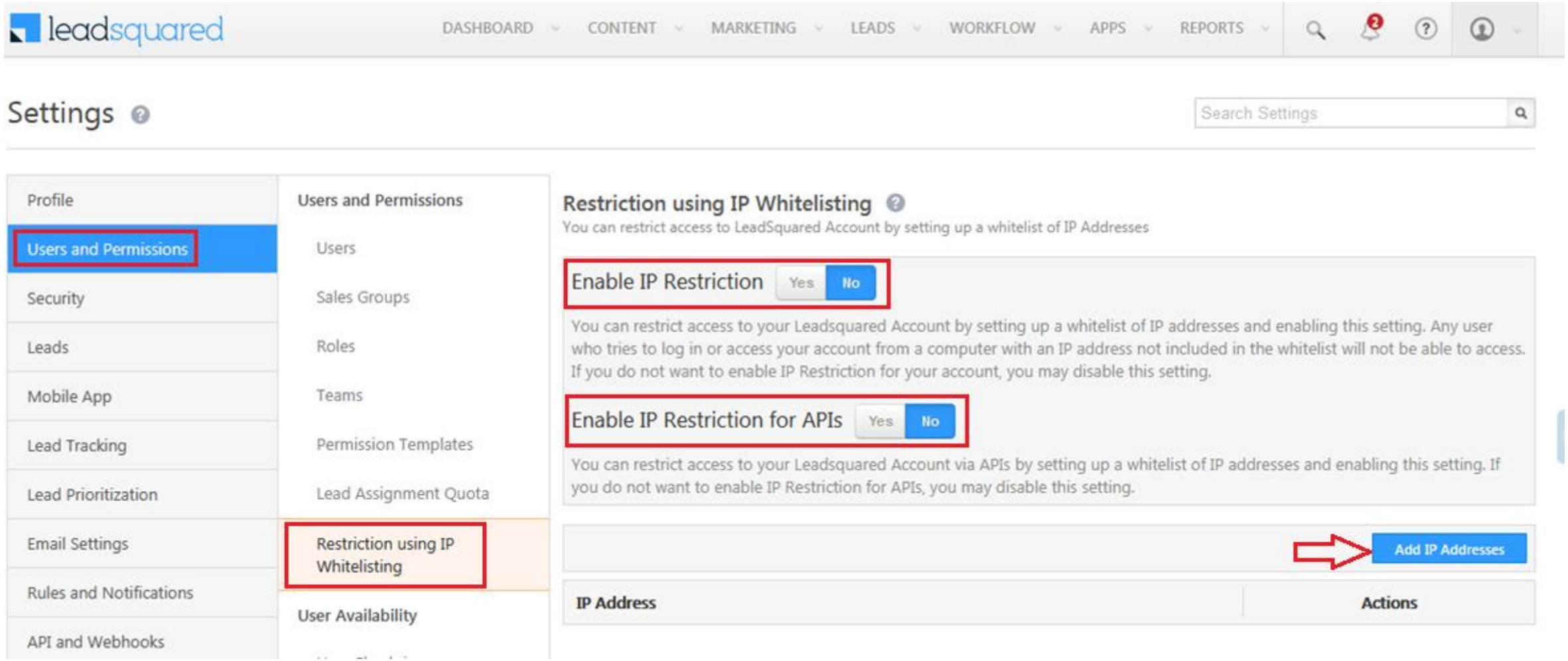
- Most of the features I will talk about, are available to your account administrators to change.
- Some features are not available on all plans, we recommend you upgrade your plans to be able to access all security features. Please contact support@leadsquared.com or your account manager for more details.

PREVENT UNAUTHORIZED ACCESS

IP Whitelisting

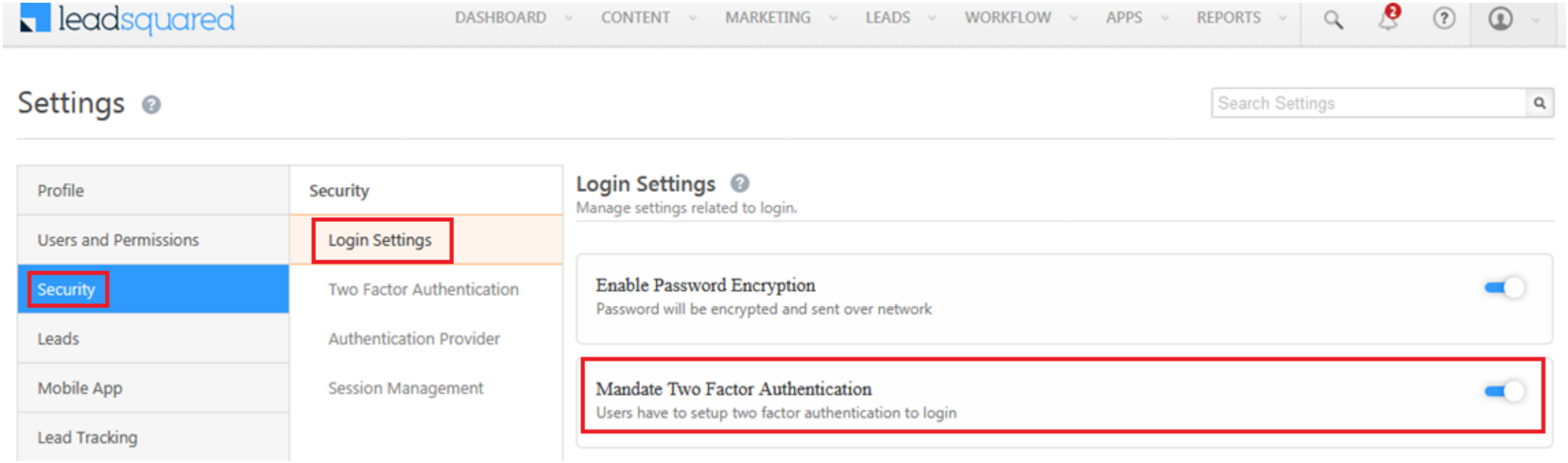
- This will help in preventing any un-intended visitors or attackers
- Check the feasibility if you can implement this
- Only requests from whitelisted IP’s are accepted and everything else is bloked

IP Whitelisting



Two Factor Authentication

- Username and Password as the first factor & OTP as second
- Email or Text message or TOTP (such as Google Authenticator, Microsoft etc.)



(MY ORGANIZATIO... DASHBOARD CONTENT MARKETING LEADS WORKFLOW APPS REPORTS

Administrator Dashboard

Add Dashlets

Key Lead Metrics

Last 30 Days

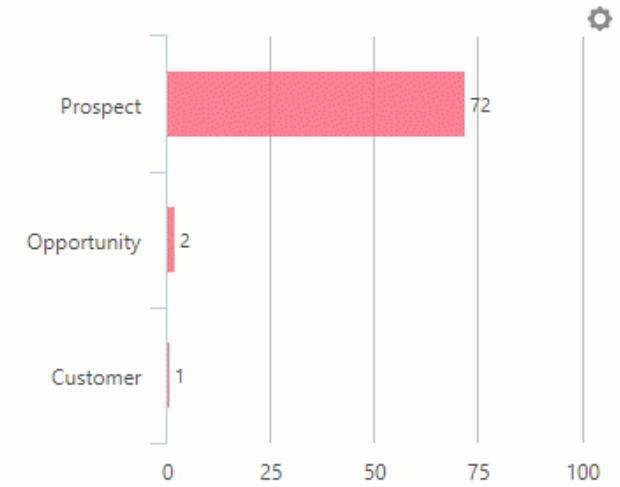
Last 30 Days

New Leads	Engagement	Active Leads
0	0%	0%

Overall

Total Leads	Engagement	Active Leads
79	0%	95%

Overall Lead Funnel



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
		0.00%

Top New Leads

Last 10 Days

No new leads in the selected period.

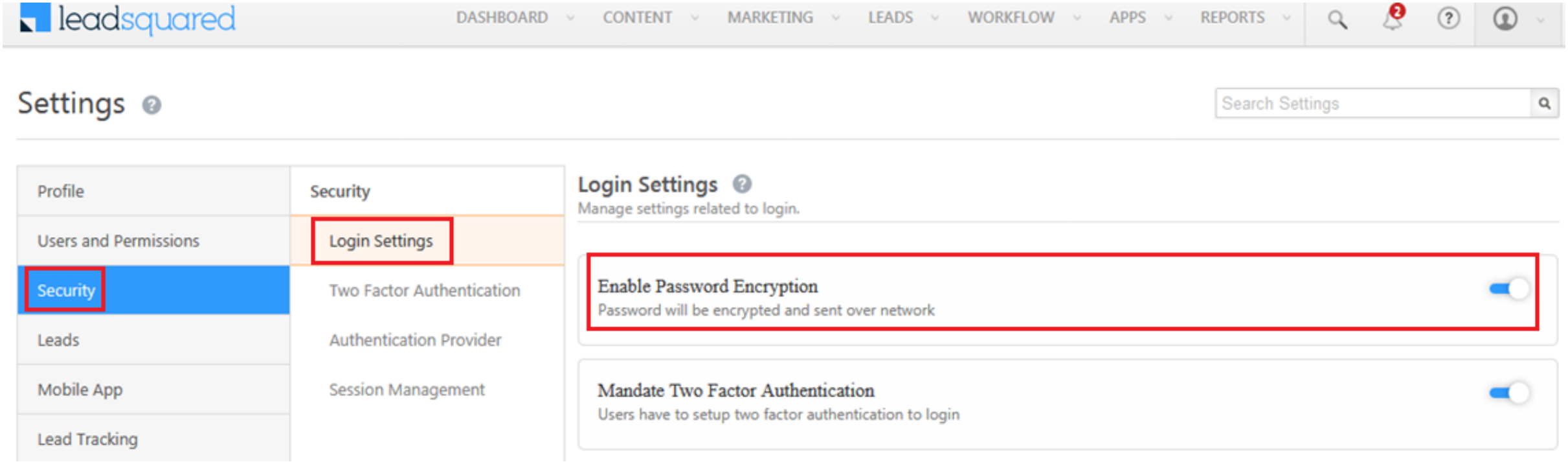
Email Summary

Last 30 Days

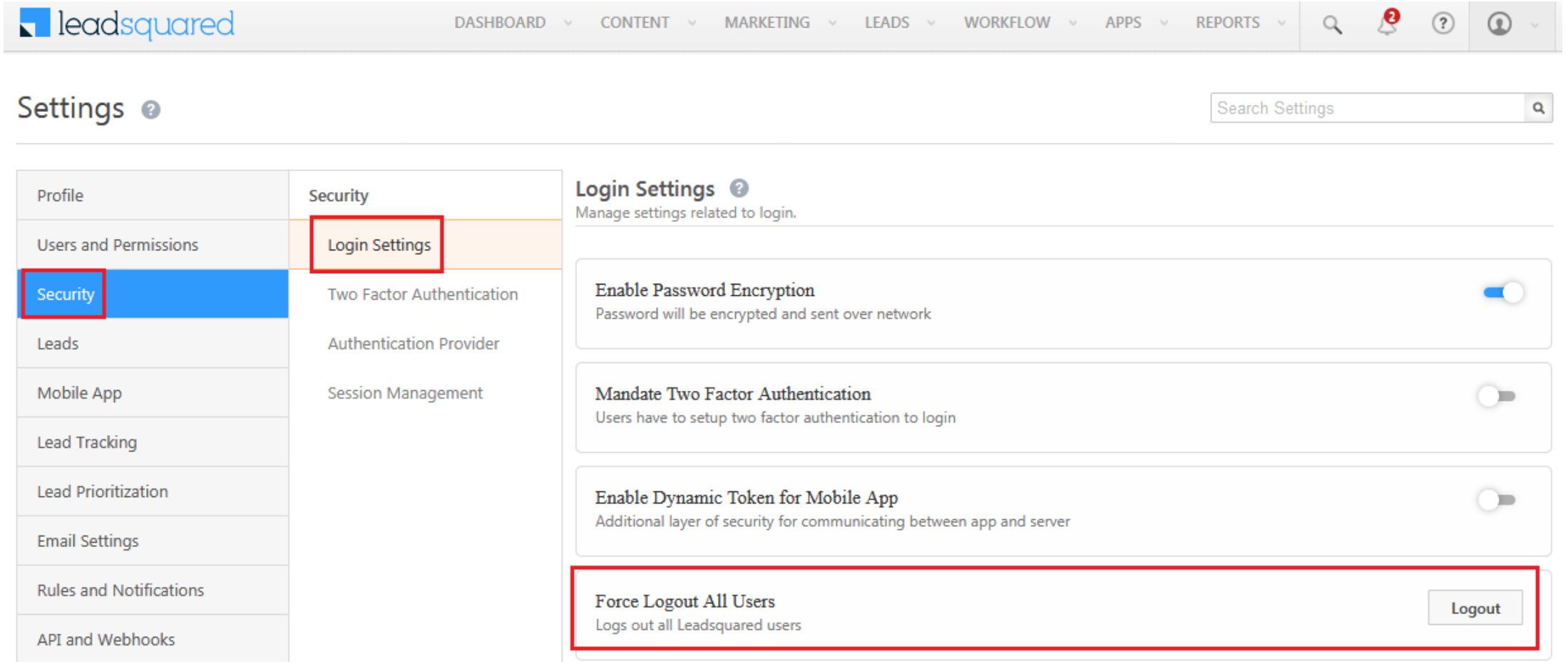
Autoresponders	577

Soft Phone

Password Encryption



Force Logout all users



Session Management

- Settings are available here:
  - My Profile>Settings>Security>Session Management

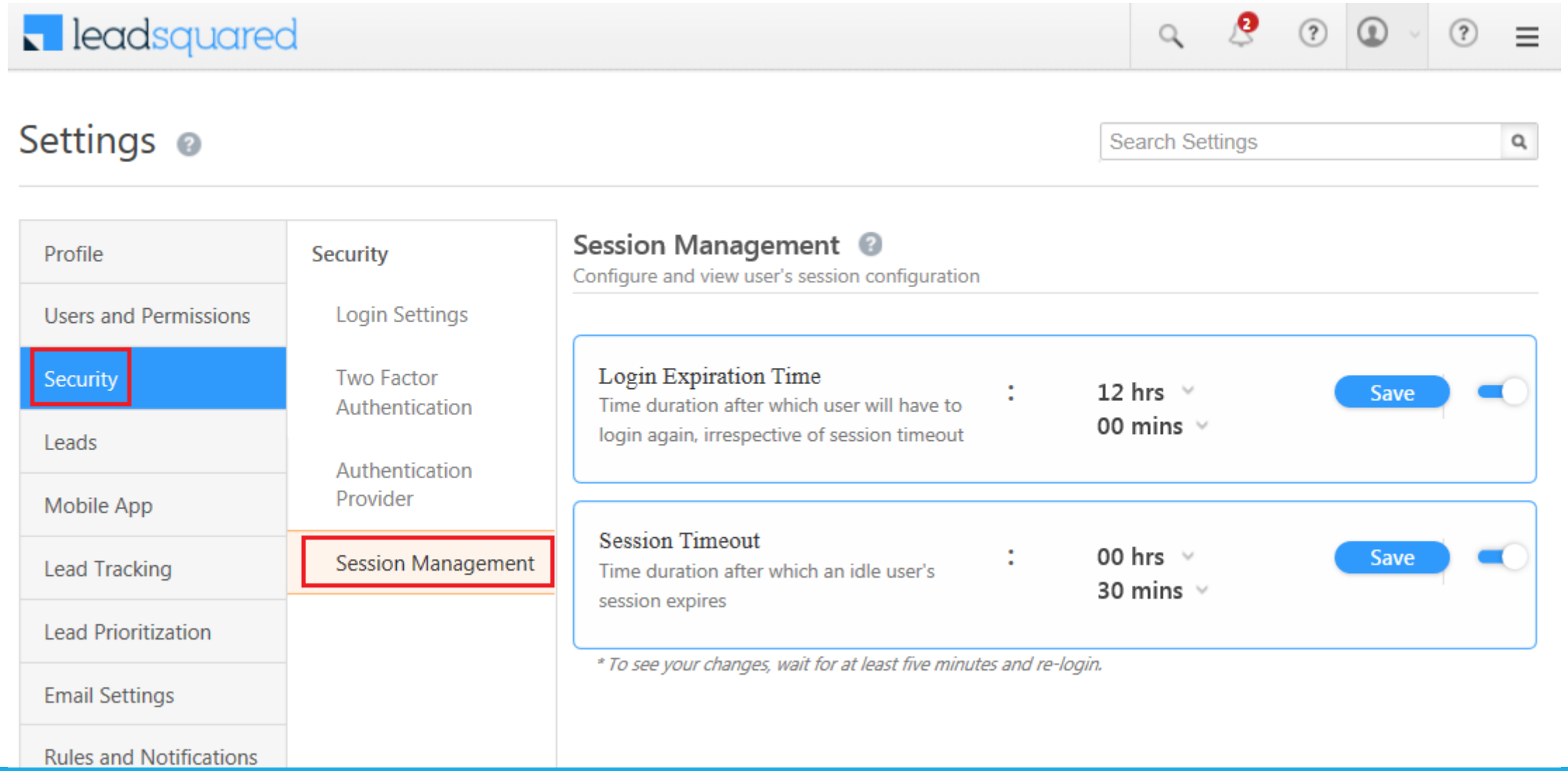
1. Session Timeout

   A user who remains idle for the configured time will be automatically logged out when this is configured.

2. Login Time Expiry

   A user will be logged out after the configured time post login.

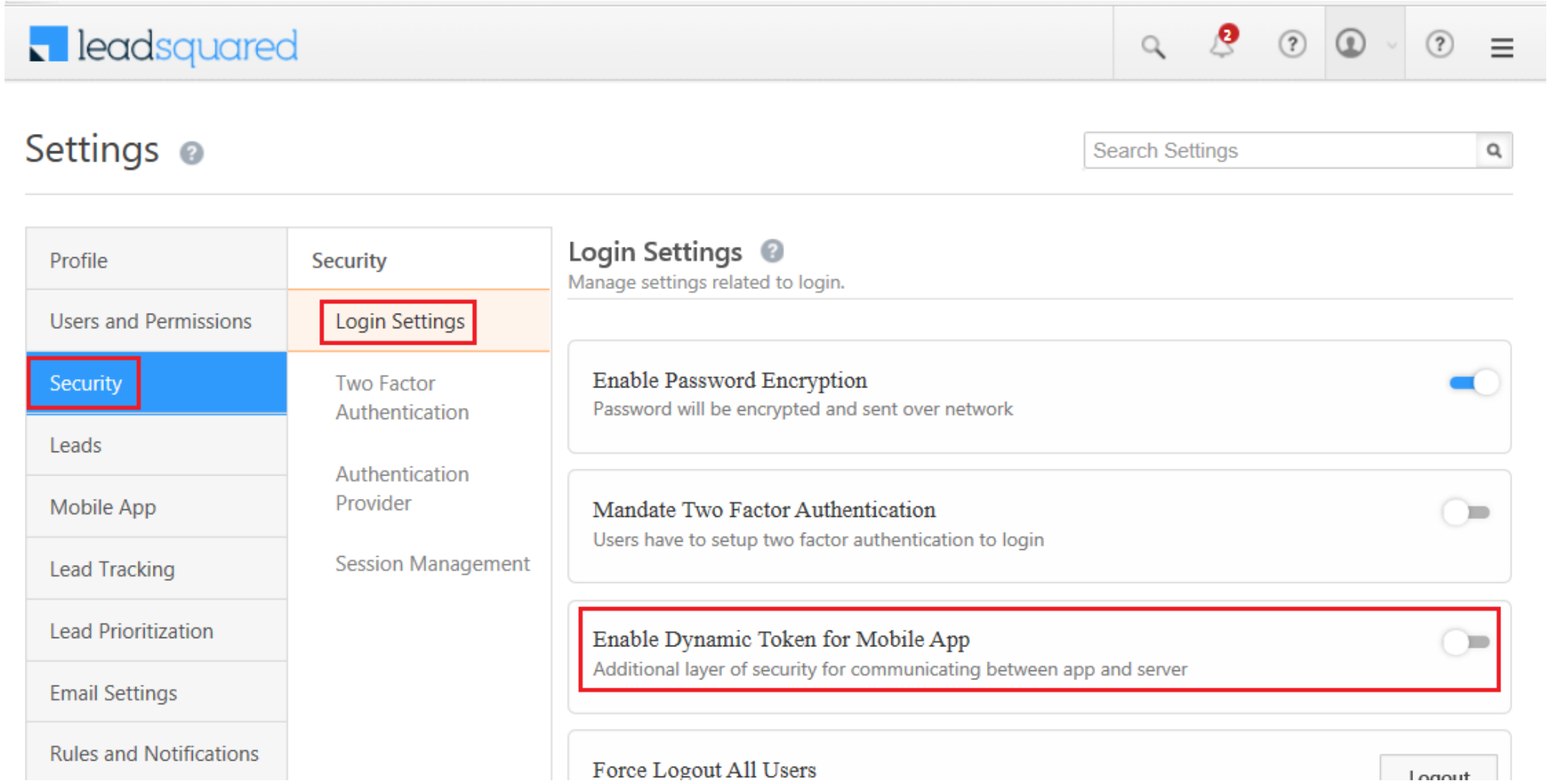
Session Management



Dynamic Token for Mobile App

- Session validity
- Only one login enabled at any given time
- If a user is logged in to one device and tries a simultaneous login on a second device, this will force log out the first device
- If this is enabled, the “Force Logout all users” feature will work for mobile users too
- Administrators can enable this to all users

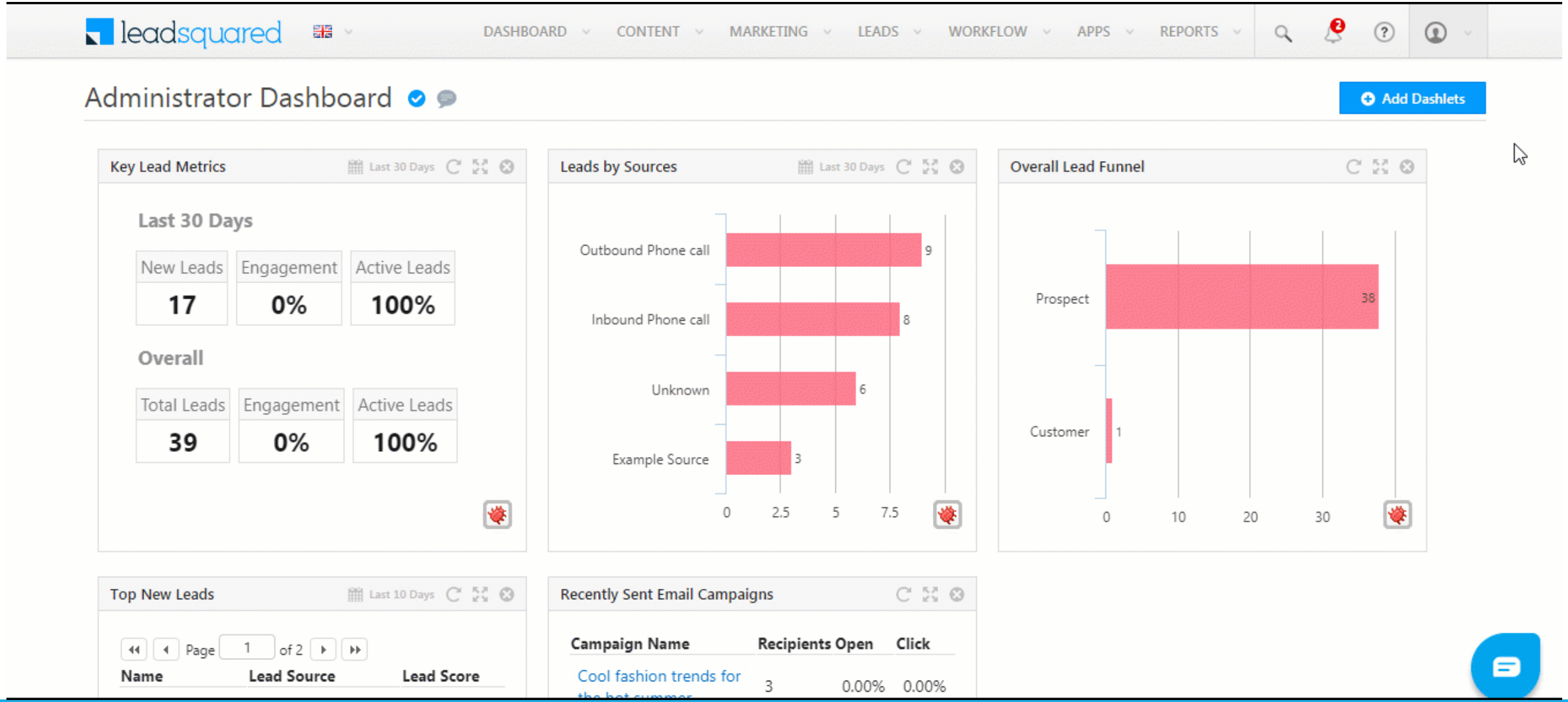
Dynamic Token for Mobile App



Authentication Provider

- You can validate usernames and passwords against your corporate user database or another client app rather than managing separate credentials for LeadSquared.
- Your organization password policies applies to LeadSquared too.
- Following are supported:
  - ADFS (Active Directory Federation Services)
  - Google
  - API

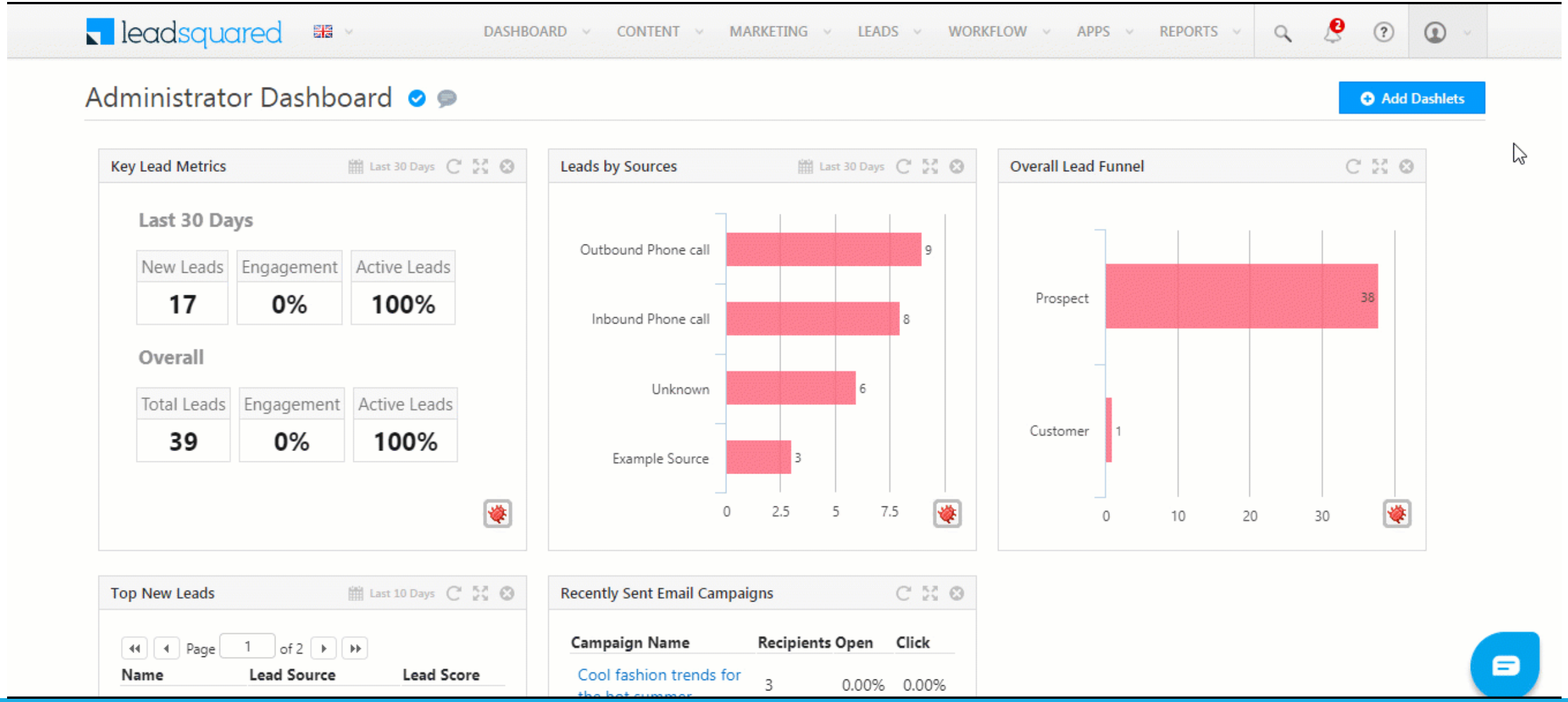
Authentication Provider



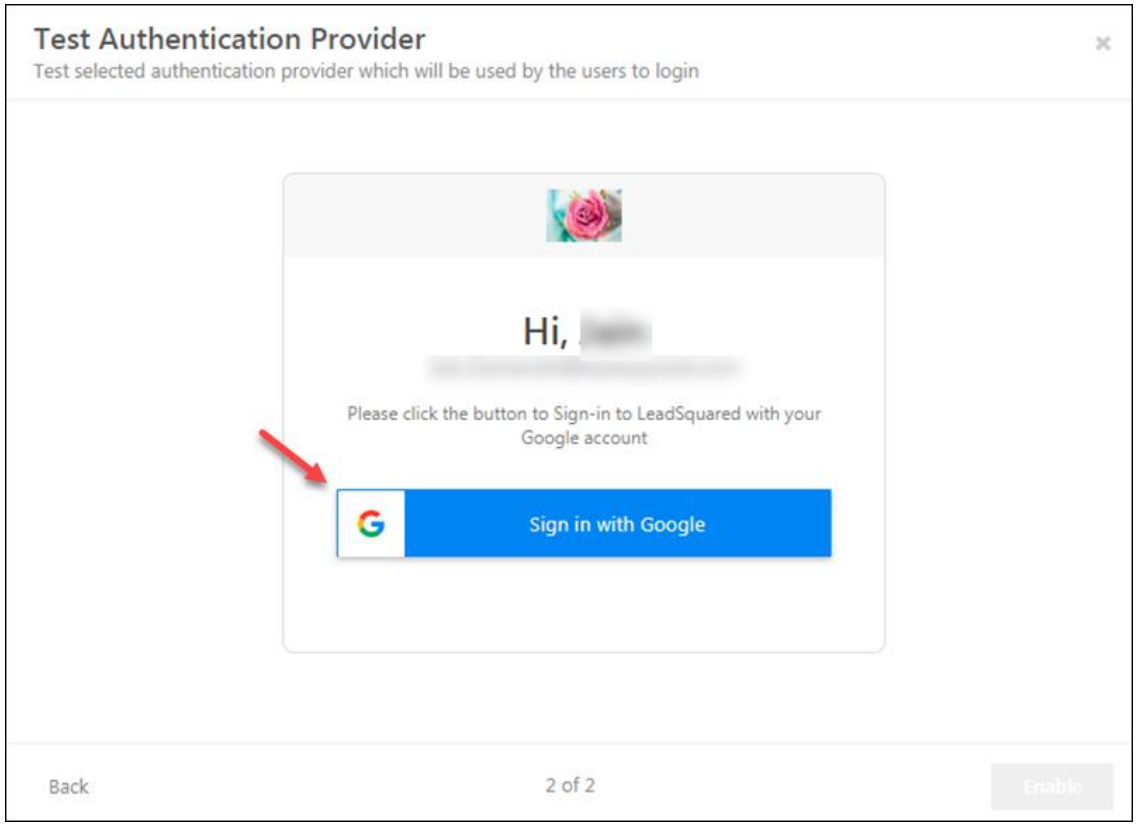
Authentication Provider - ADFS

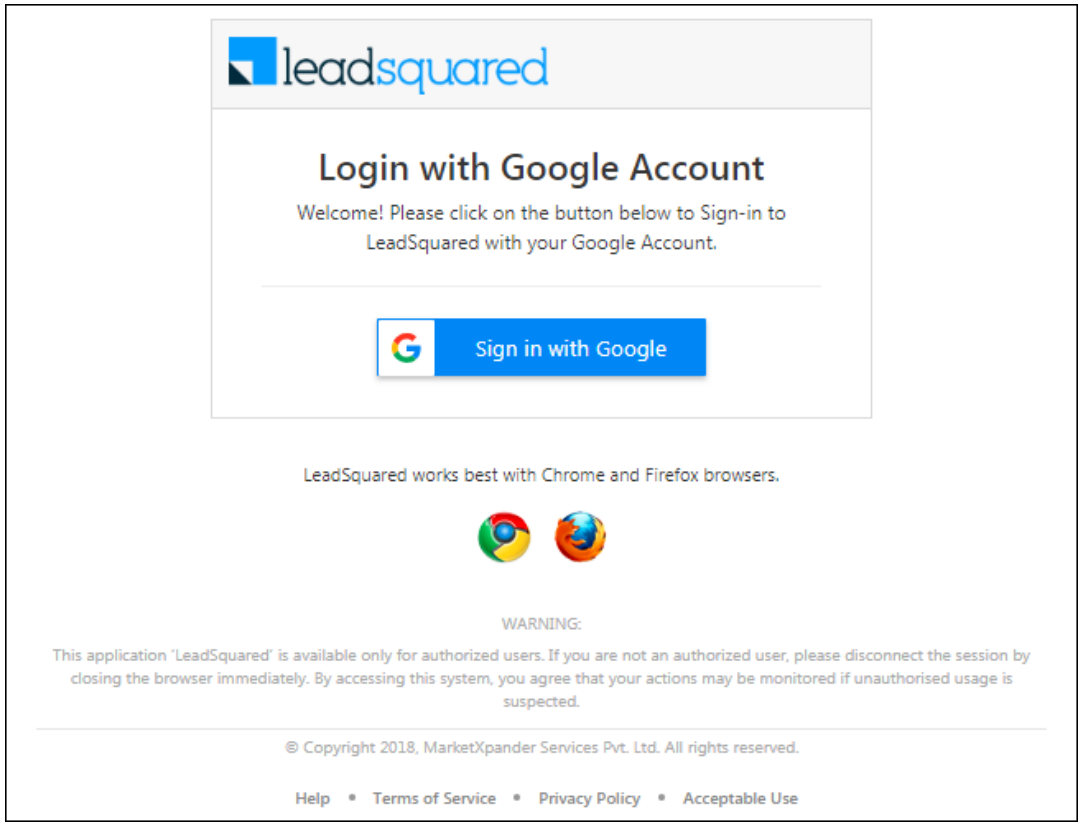
- Prerequisites:
  - LeadSquared Administrator User
  - Access to your domain Active Directory server
  - ADFS Installed
  - SSL cert and thumbprint of that certificate
  - Username and email ID are the same on LeadSquared and on the platform you are trying to integrate
- Process:
  - Add a Relying Party Trust to your ADFS server
  - Obtain the Certificate Thumbprint
  - Configure LeadSquared Authentication Provider settings
- Detailed steps available here:
  - https://help.leadsquared.com/adfs-integration-for-sign-in-in-leadsquared/

Authentication Provider - ADFS



Authentication Provider - Google





Authentication Provider - API

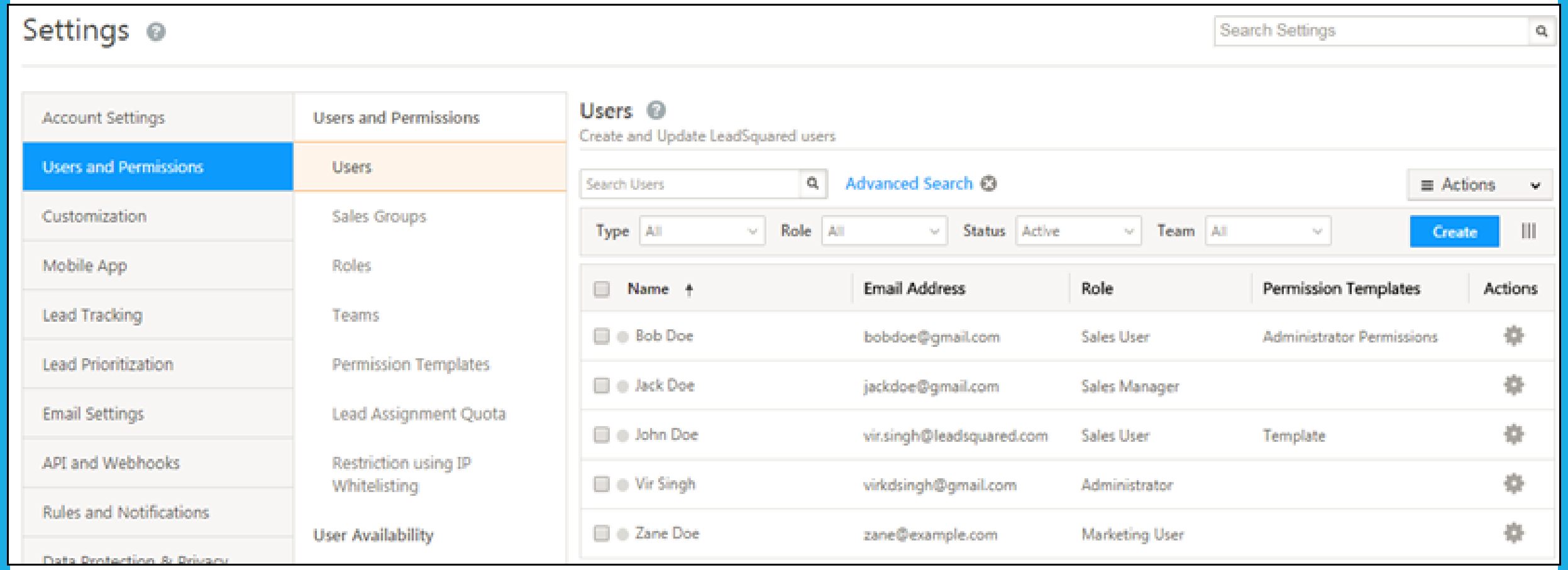
- You can use a third-party tool to integrate auth with LeadSquared.
- Simple and easy to setup
- Process:
  - Enable *Third Party Auth Provider* > Select *API*
  - On the Configure Authentication Provider pop-up, enter the details of the API you've exposed. When you're done, click Test.

CONTROL DATA ACCESS RIGHTS & USERS PERMISSIONS

User Roles

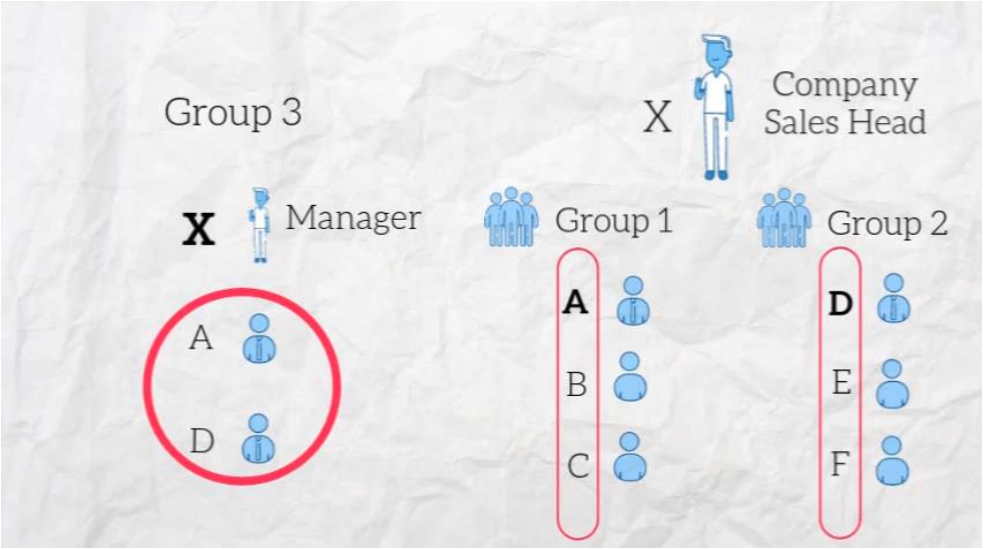
User Role	Access Rights
Sales User	• Can access only the Leads assigned (where the user is the Lead Owner) • Cannot access Marketing Functions like Email Campaigns, Landing Pages, Autoresponders, Automation • Sales Users can be associated in groups, to know details about creating and managing groups please refer *Manage Groups*
Sales Manager	• Can access ALL leads (leads assigned to any user) • Cannot access Marketing Functions like Email Campaigns, Landing Pages, Autoresponders, Automation • Limited access to Settings
Marketing User	• Can access ALL leads (leads assigned to any user) • Can access all Marketing Functions • Limited access to Settings (more than Sales Manager but less than Administrator).
Administrator	• Complete access to everything
Super Administrator	• Can apply permission templates to restrict access given to administrator users • Can set administrator users as super admins

User Roles

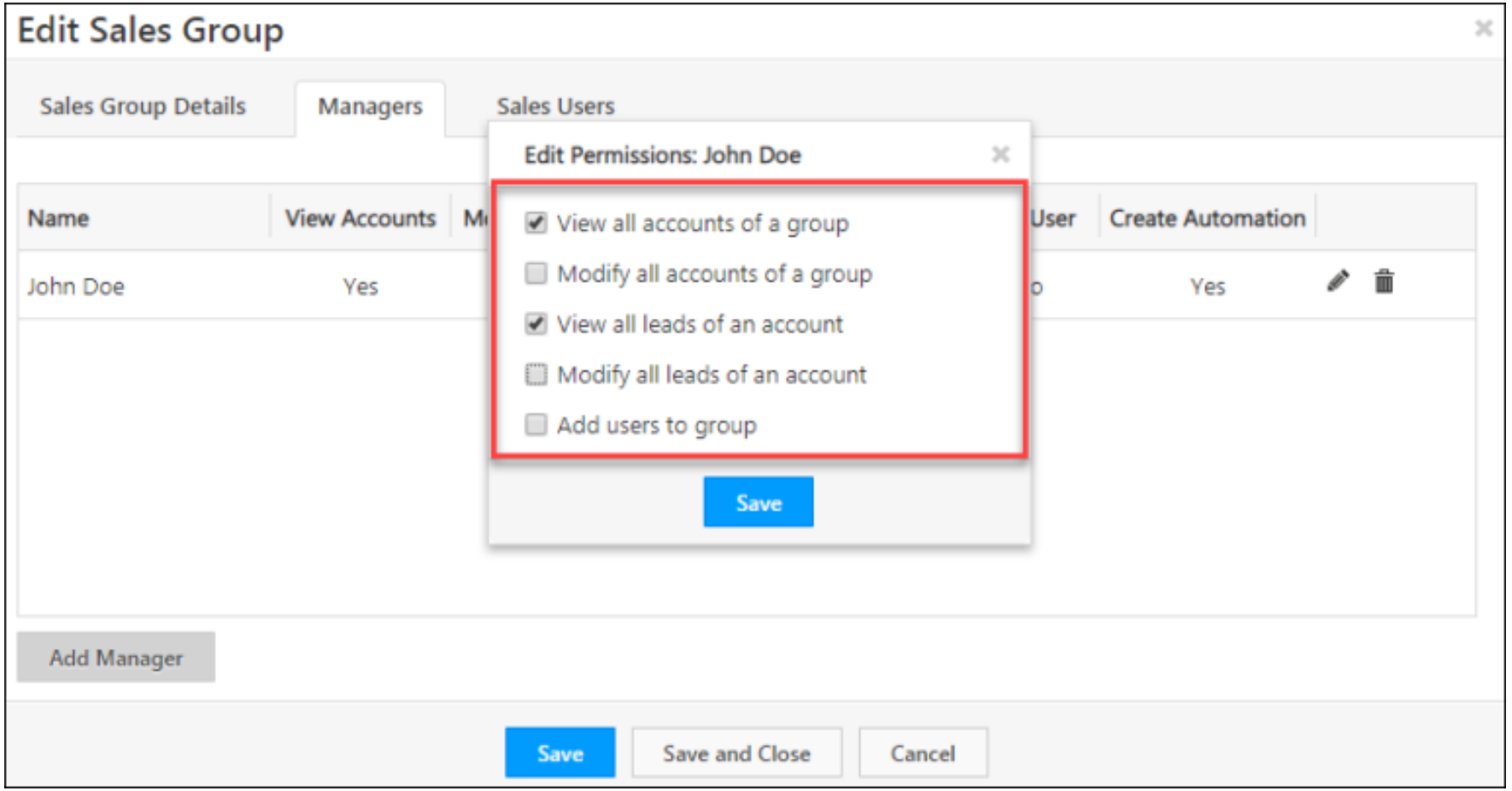

Settings
Search Settings
Account Settings
Users and Permissions
Customization
Mobile App
Lead Tracking
Lead Prioritization
Email Settings
API and Webhooks
Rules and Notifications
Users and Permissions
Users
Sales Groups
Roles
Teams
Permission Templates
Lead Assignment Quota
Restriction using IP Whitelisting
User Availability
Users
Create and Update LeadSquared users
Search Users
Advanced Search
Actions
Type All
Role All
Status Active
Team All
Create
Name
Email Address
Role
Permission Templates
Actions
Bob Doe bobdoe@gmail.com Sales User Administrator Permissions
Jack Doe jackdoe@gmail.com Sales Manager
John Doe vir.singh@leadsquared.com Sales User Template
Vir Singh virkdsingh@gmail.com Administrator
Zane Doe zane@example.com Marketing User

Sales Groups

- Organize your sales users into different groups based on their location, department etc.
- View / modify leads in the group
- Setup Automations
- Setup access groups



Sales Groups

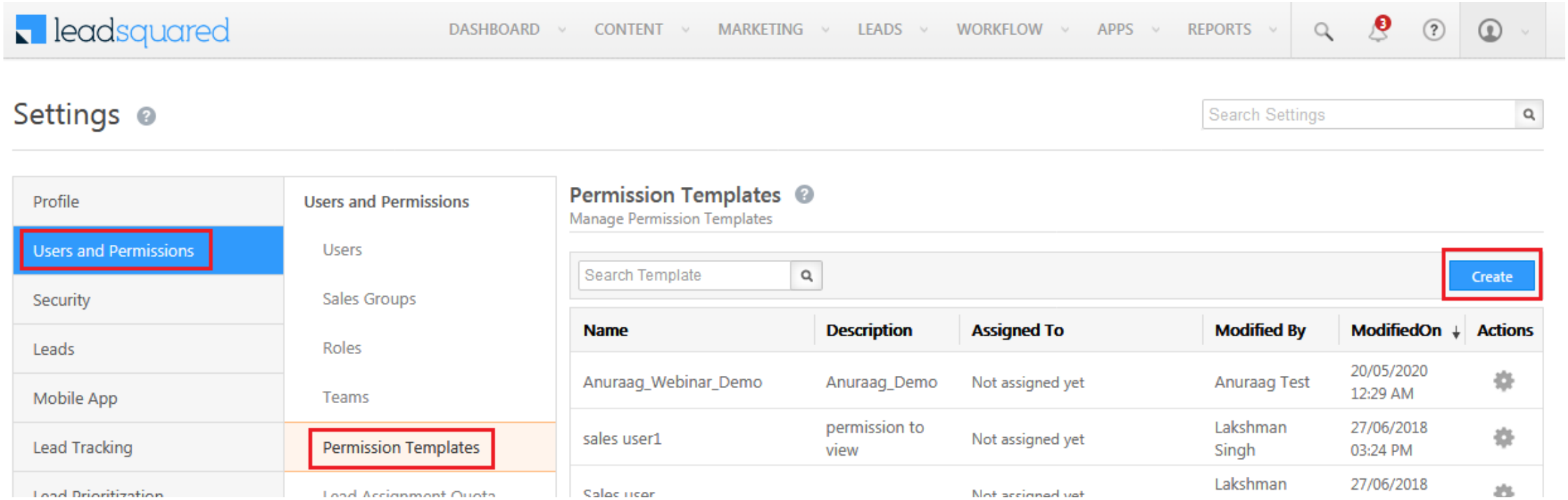


Permission Templates

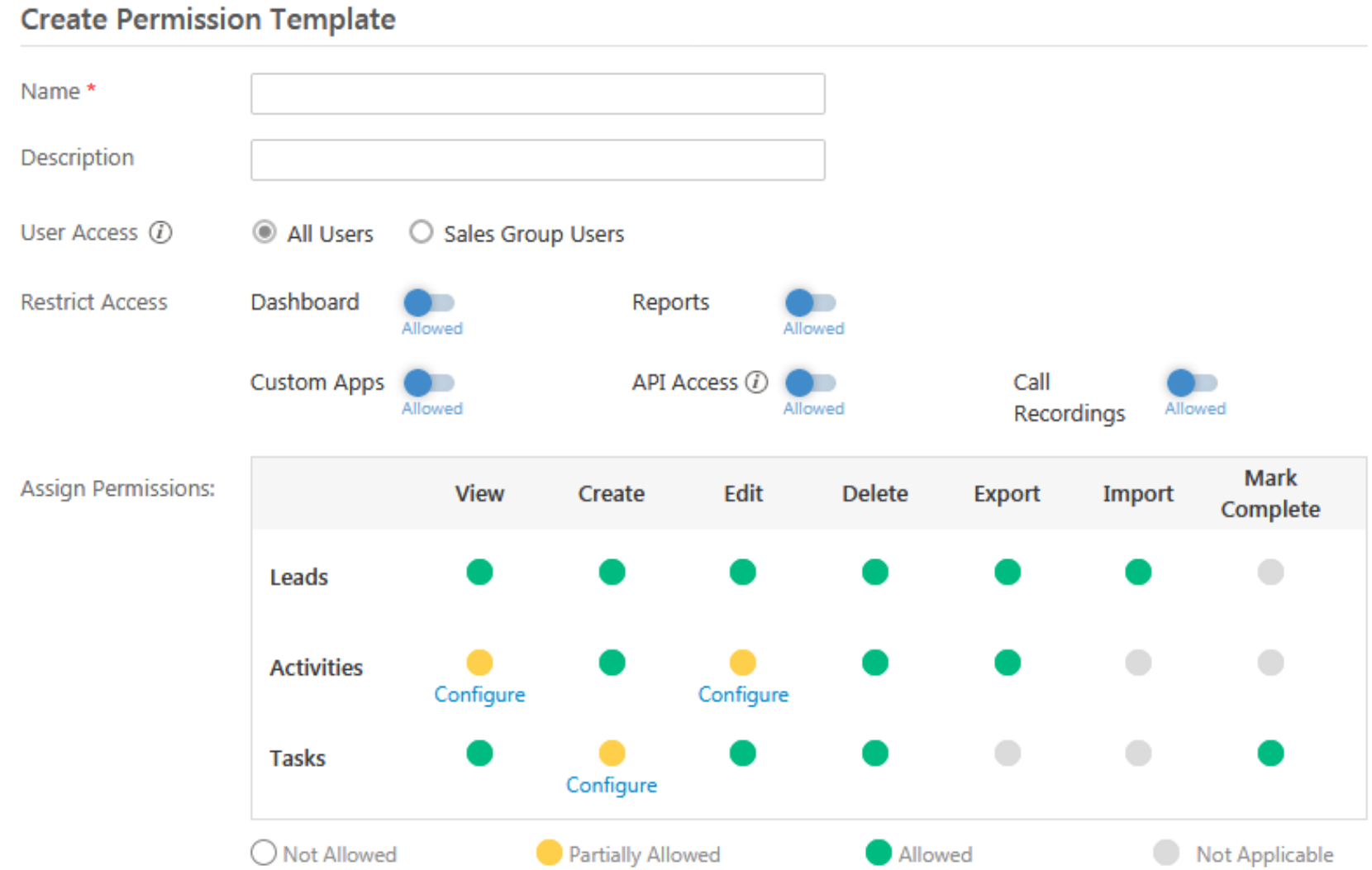
- Permission templates let you control access to features and actions (like viewing, creating, editing, deleting, exporting and importing leads).
- Apply these templates on user, role or sales group level.

- You can:
  - Create a permission template
  - Apply a permission template
  - Control which users are shown in dropdown fields
  - Apply permission templates to Admin users

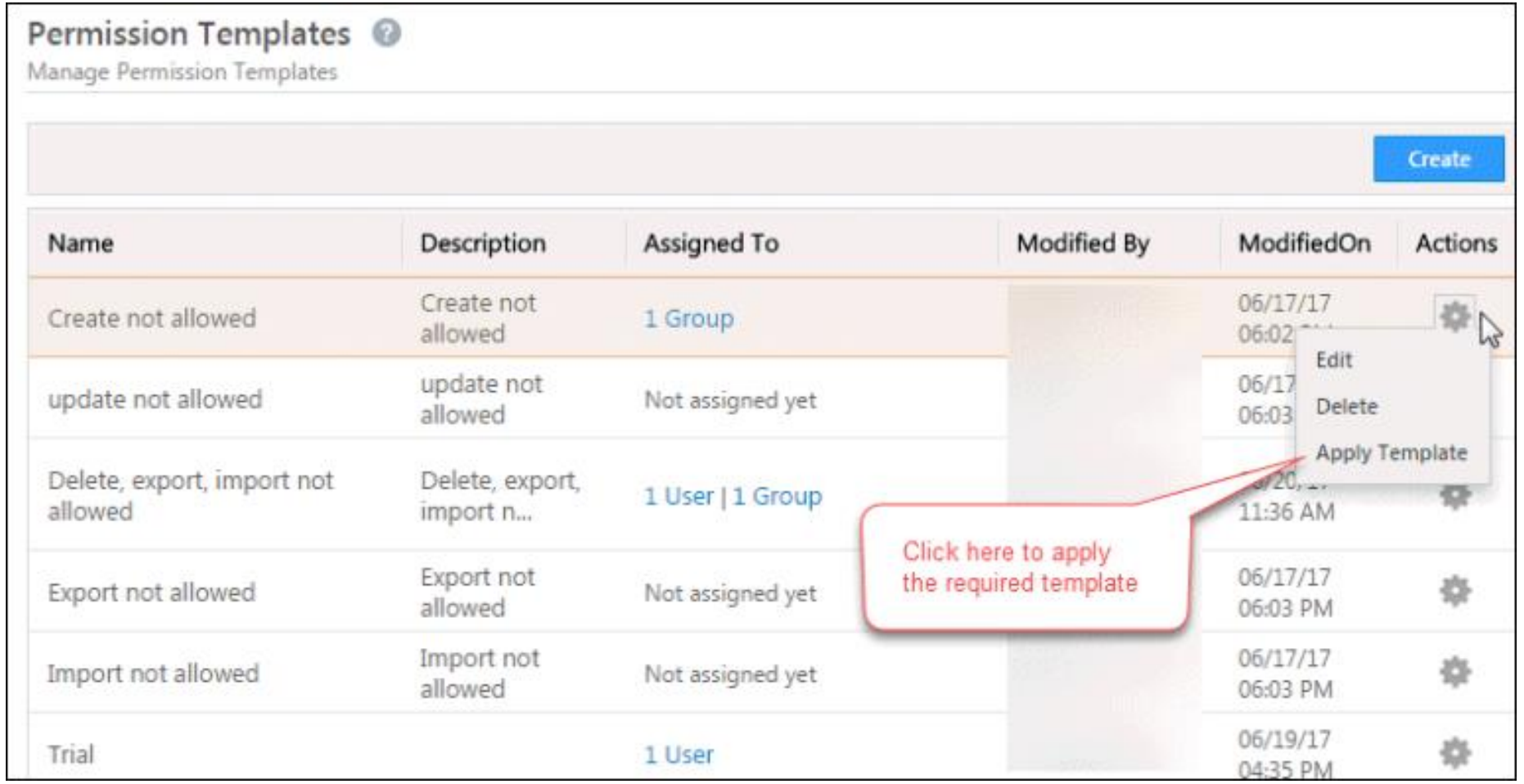
Permission Templates



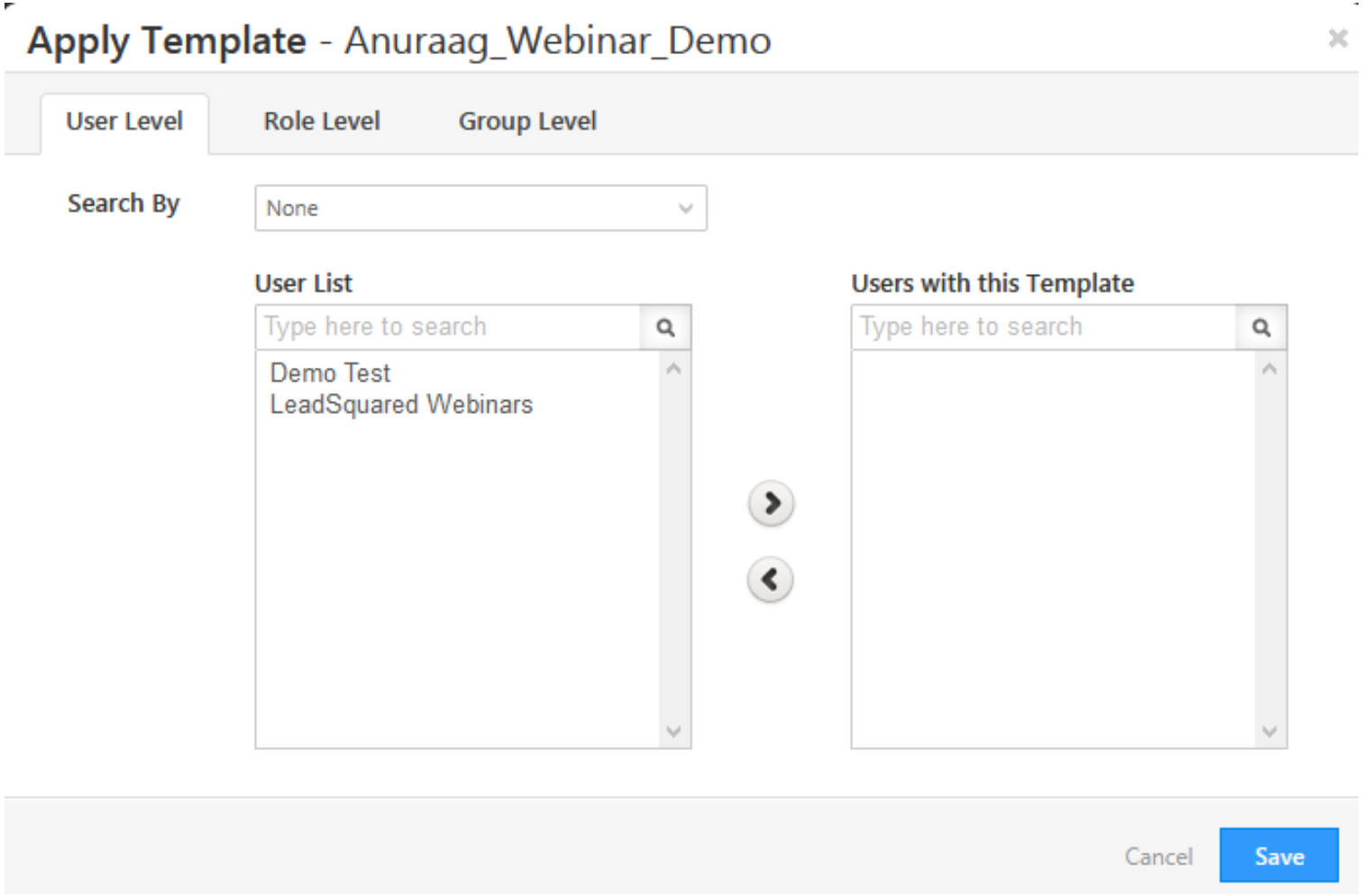
Permission Templates



Permission Templates



Permission Templates

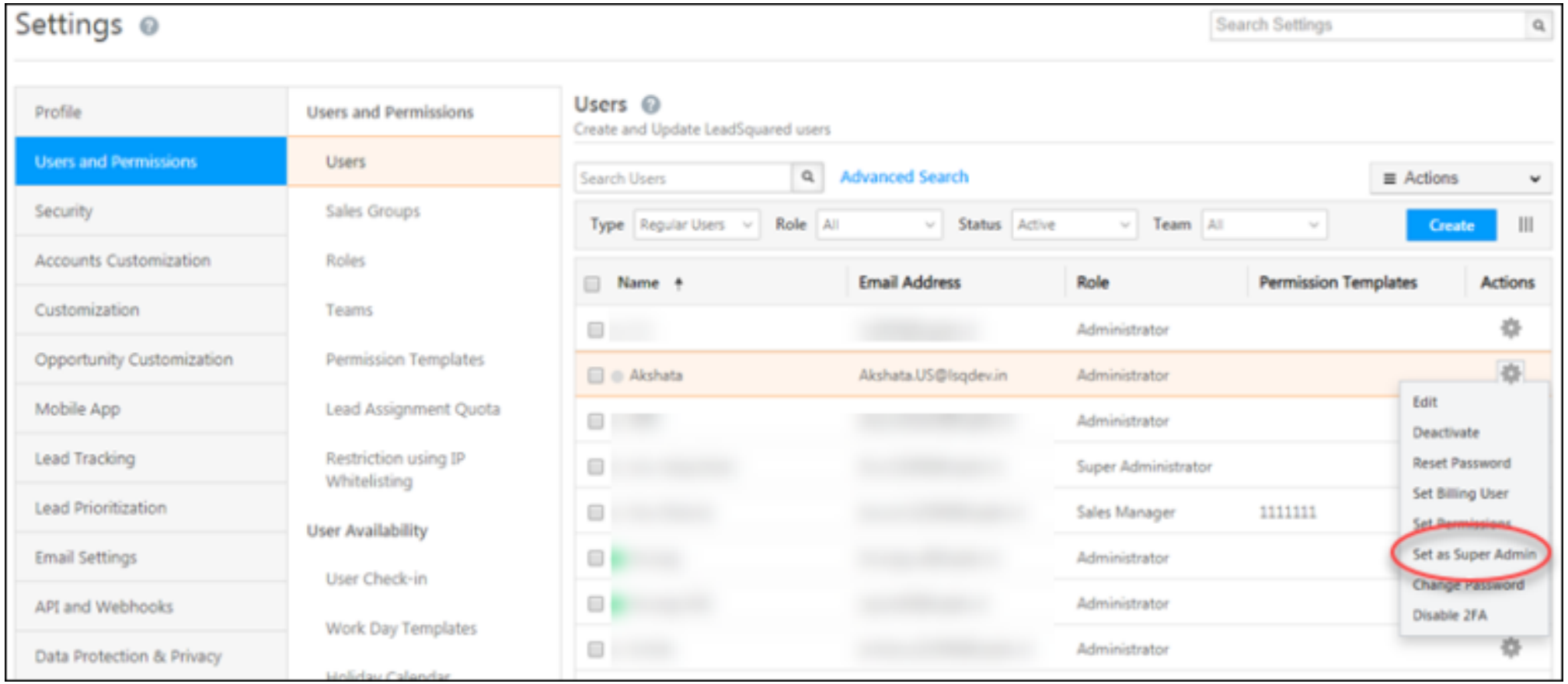


Permission Templates
Control users in dropdown fields

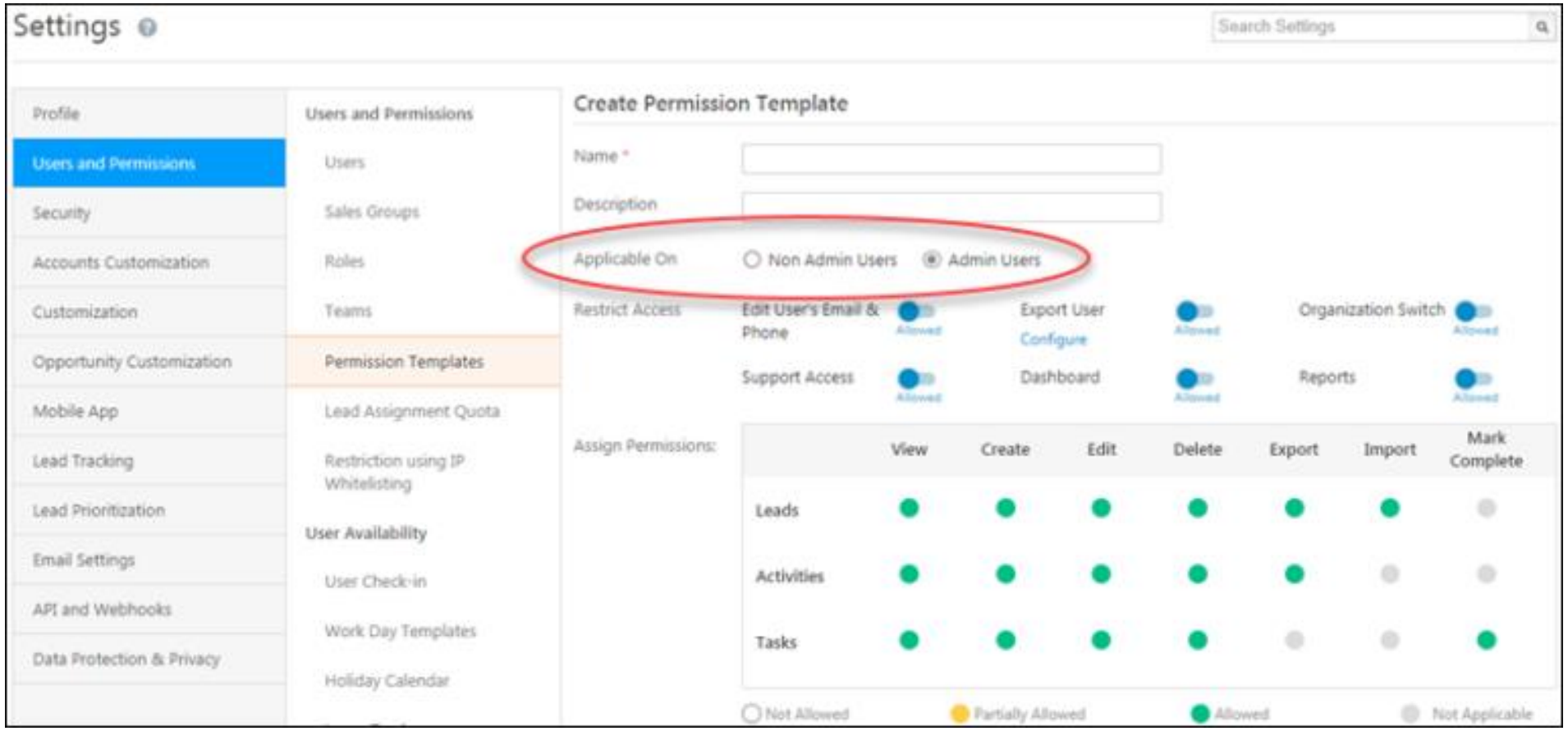
- 'User Access' setting lets you control the users shown in user/owner drop-down fields across the LeadSquared application.
- Helps you prevent sales users from accessing the leads of other sales users.
- Once you implement this feature, sales group managers will only see users in their own groups and other sales users in the group will only see their own names in all user/owner drop-downs across the platform
- This will help in restricting unwanted access between different teams or if you have external parties, between them and internal teams etc.

Permission Templates
(For Admin Users)

- Super Admins can setup Permission Templates for Administrator users



Permission Templates
(For Admin Users)



SECURE YOUR LANDING PAGES

Google reCAPTCHA

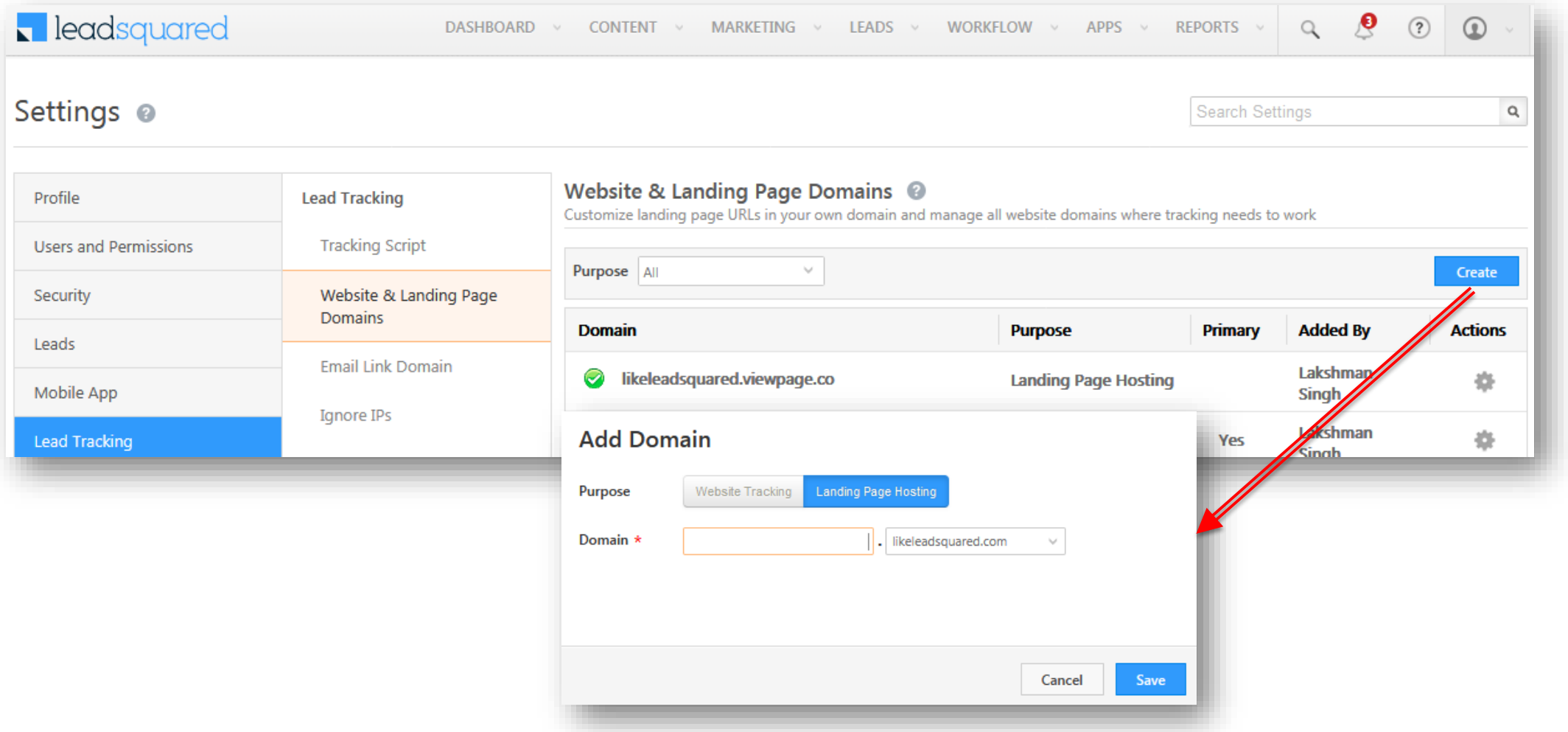
- Helps you protect from bot attacks and creating multiple fake leads
- You should have a valid Google Account
- Make sure you add all your landing page domains on LeadSquared here:

Profile>Settings>LeadTracking>Website & Landing Page Domains

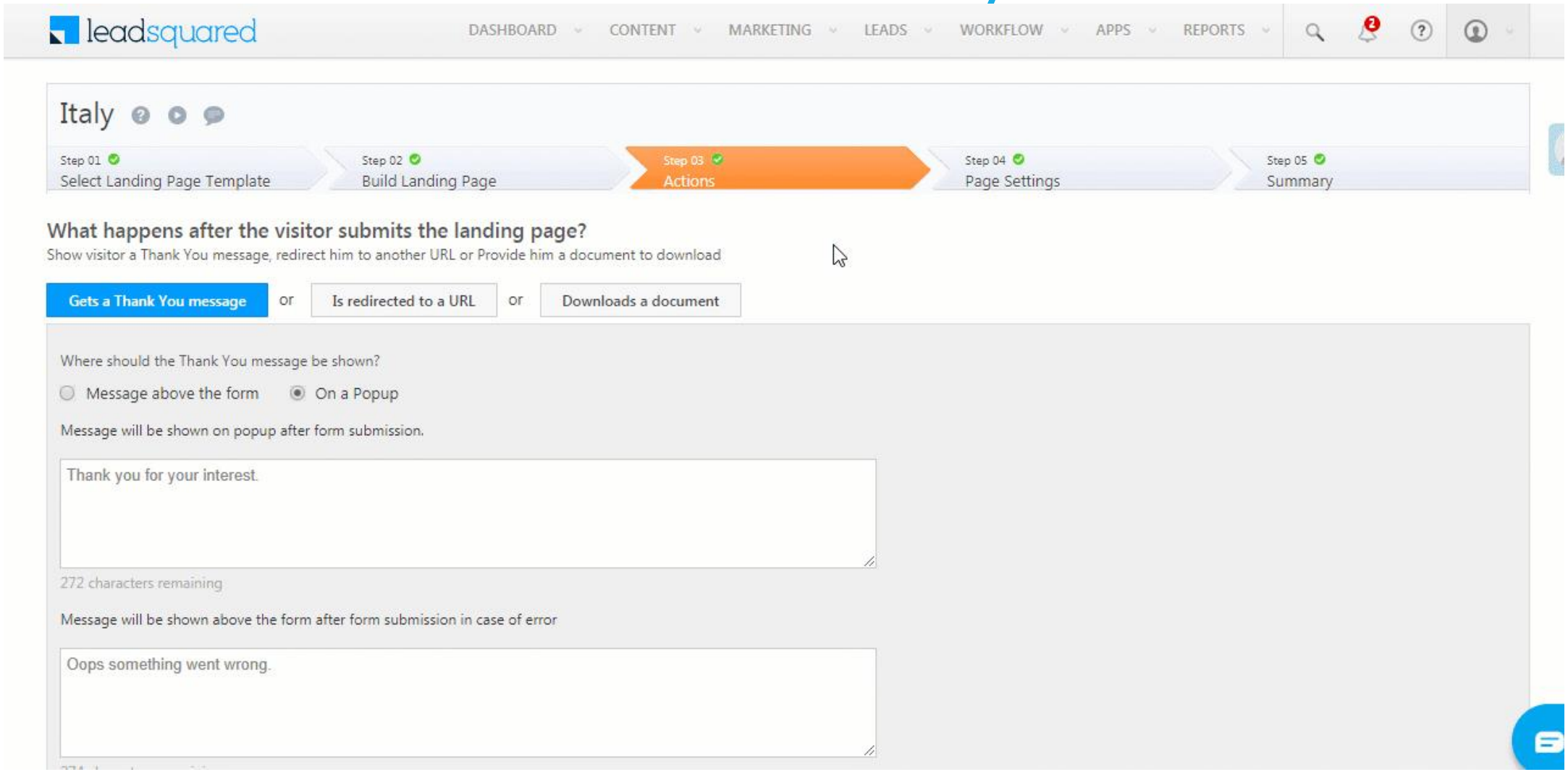
- Process:
  - Generate reCAPTCHA key pair
  - Add key pair to your LeadSquared account
  - Link the keys to your landing page
  - Preview and finish the setup

Allow submissions from registered domains only

- Register the accepted domain here:



Allow submissions from registered domains only

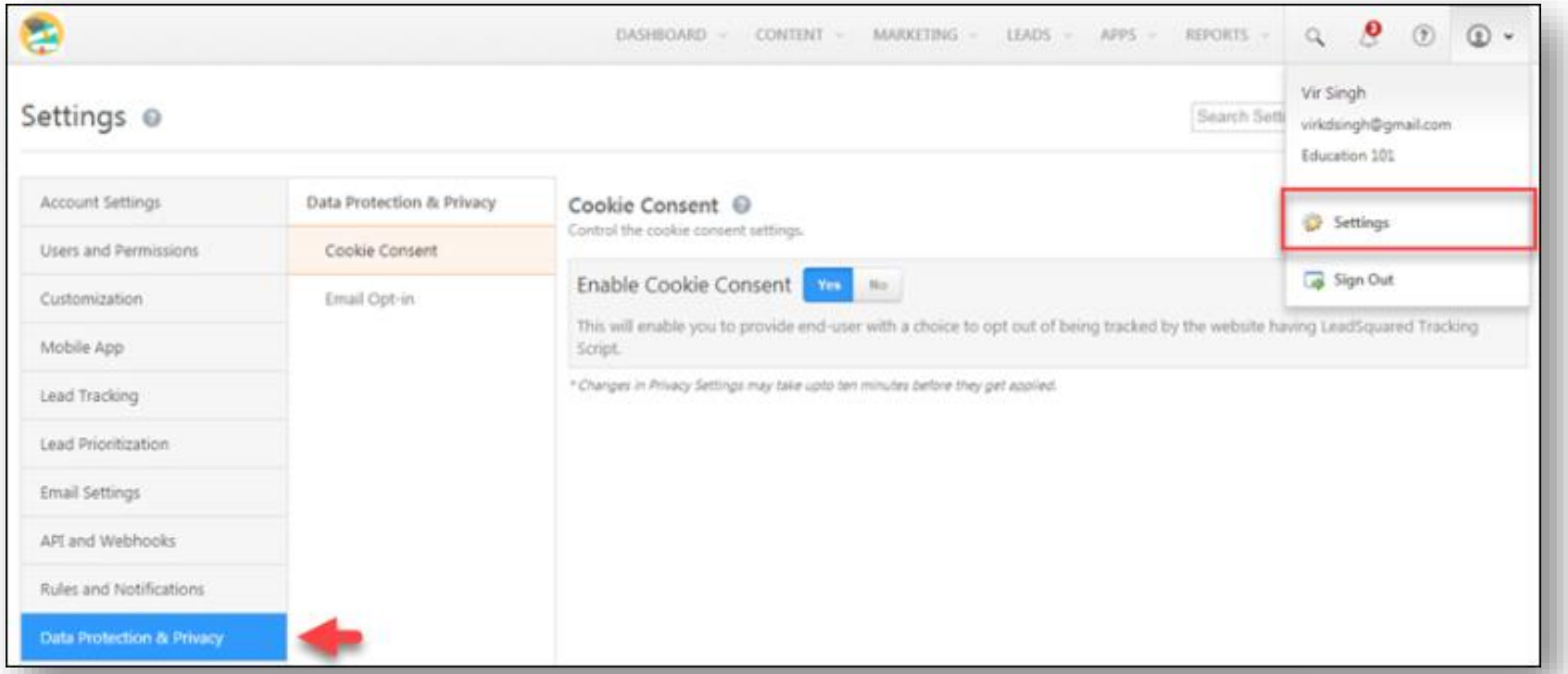


PROTECT PRIVACY OF YOUR LEADS

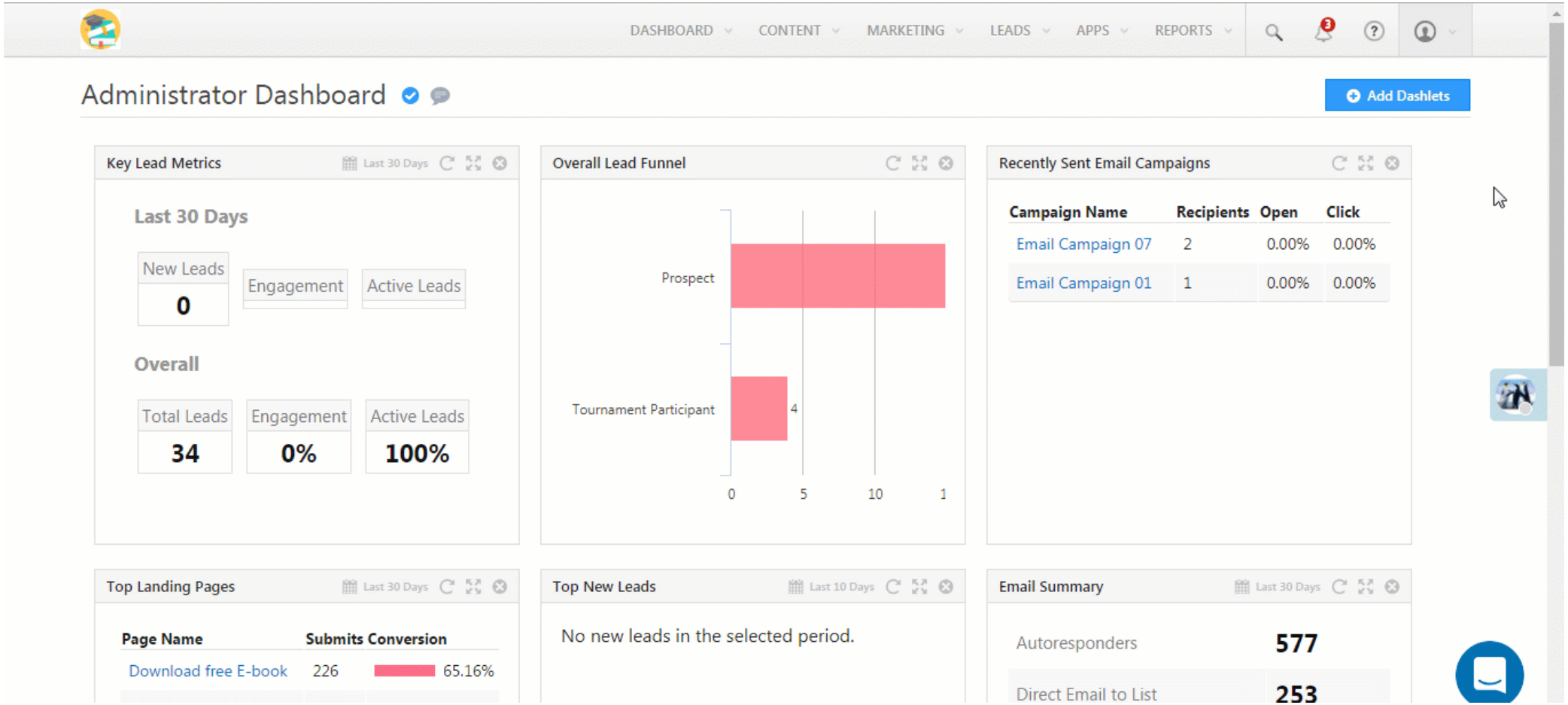
Privacy Options Available

1. Cookie Consent
2. Email Opt-in
3. Personal Data Protection

Cookie Consent

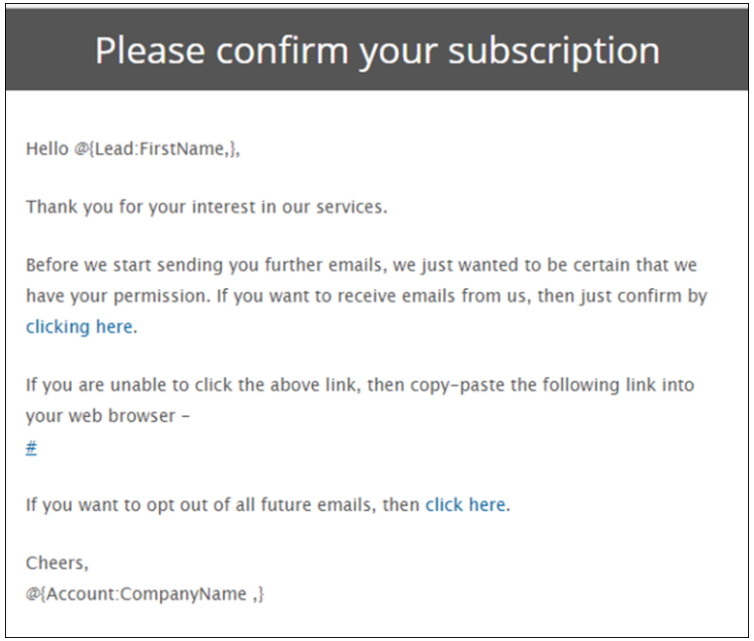


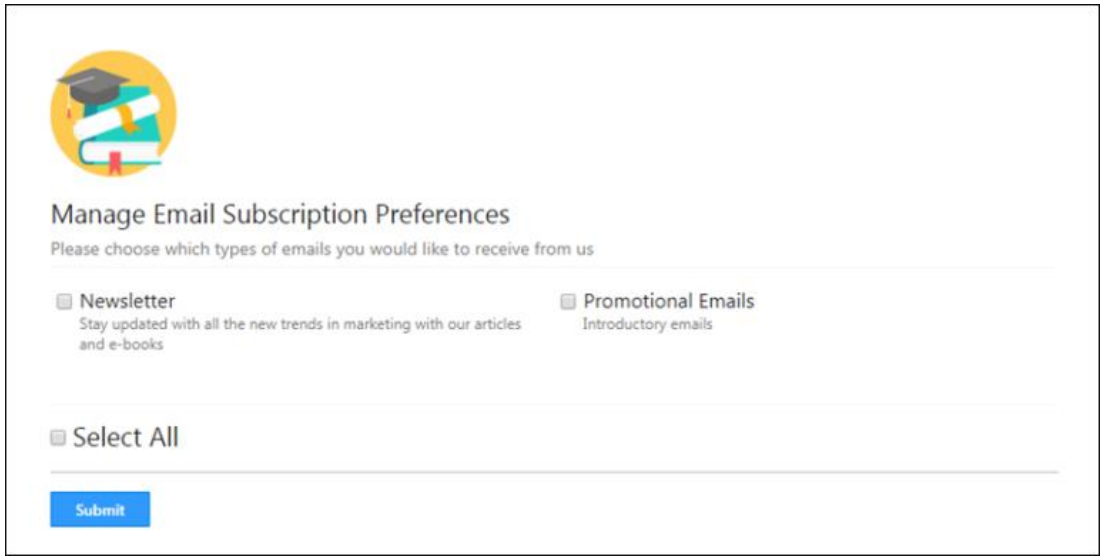
Email Opt-in | How to enable



Email Opt-in

- You can setup Automations to trigger an email to leads asking for their consent.
- Users can provide consent and enable subscriptions





Personal Data Protection

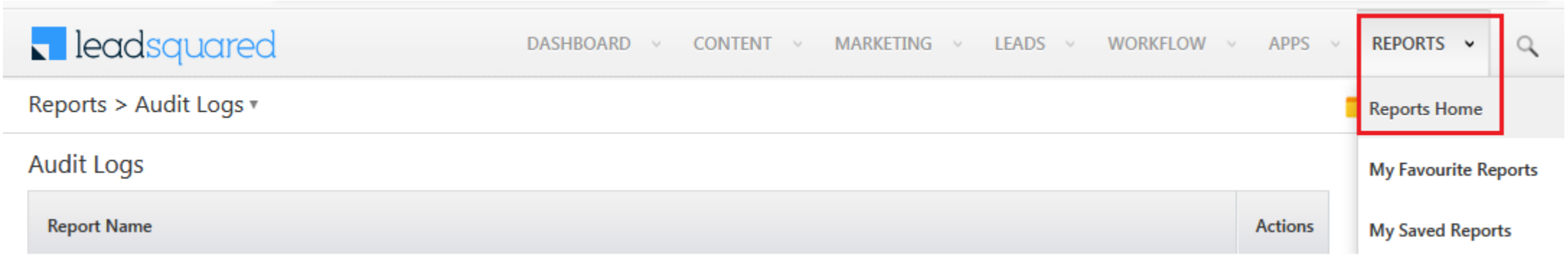
- This helps you comply with GDPR
- When enabled, it automatically creates a landing page in your account (in draft status) that you can publish to existing leads and present them with the following options –
  - View their data
  - Remove their data
  - Update their data
  - Do Not Track
  - Others (comments are available)

This is applicable to existing leads only and you can track if someone makes an entry here.

REVIEW AUDIT LOGS

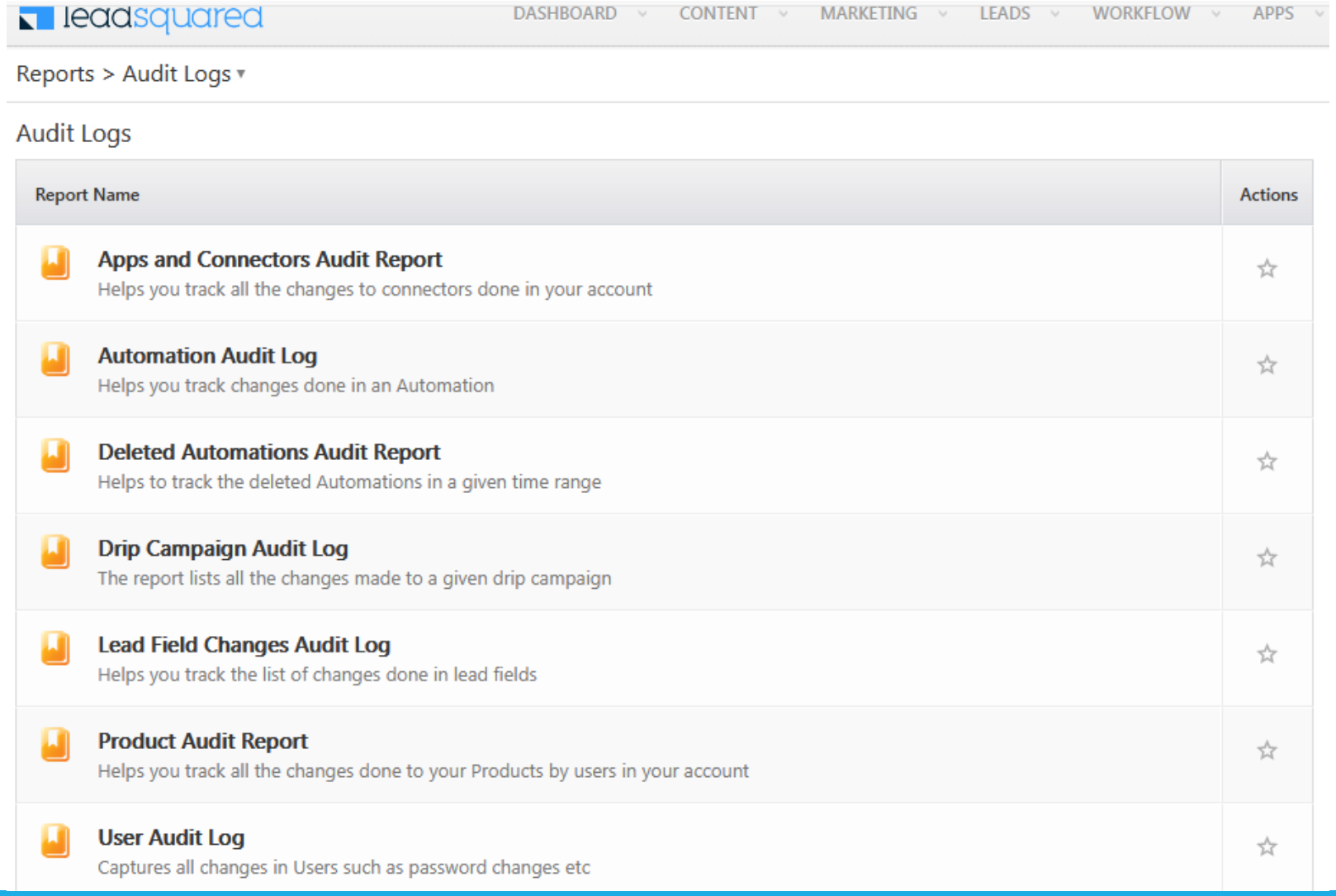
Review Audit Logs

- All actions and activities on your LeadSquared account are recorded, and logs can be reviewed.
- On your *Administrator Dashboard*, click on *Reports* > *Reports Home*

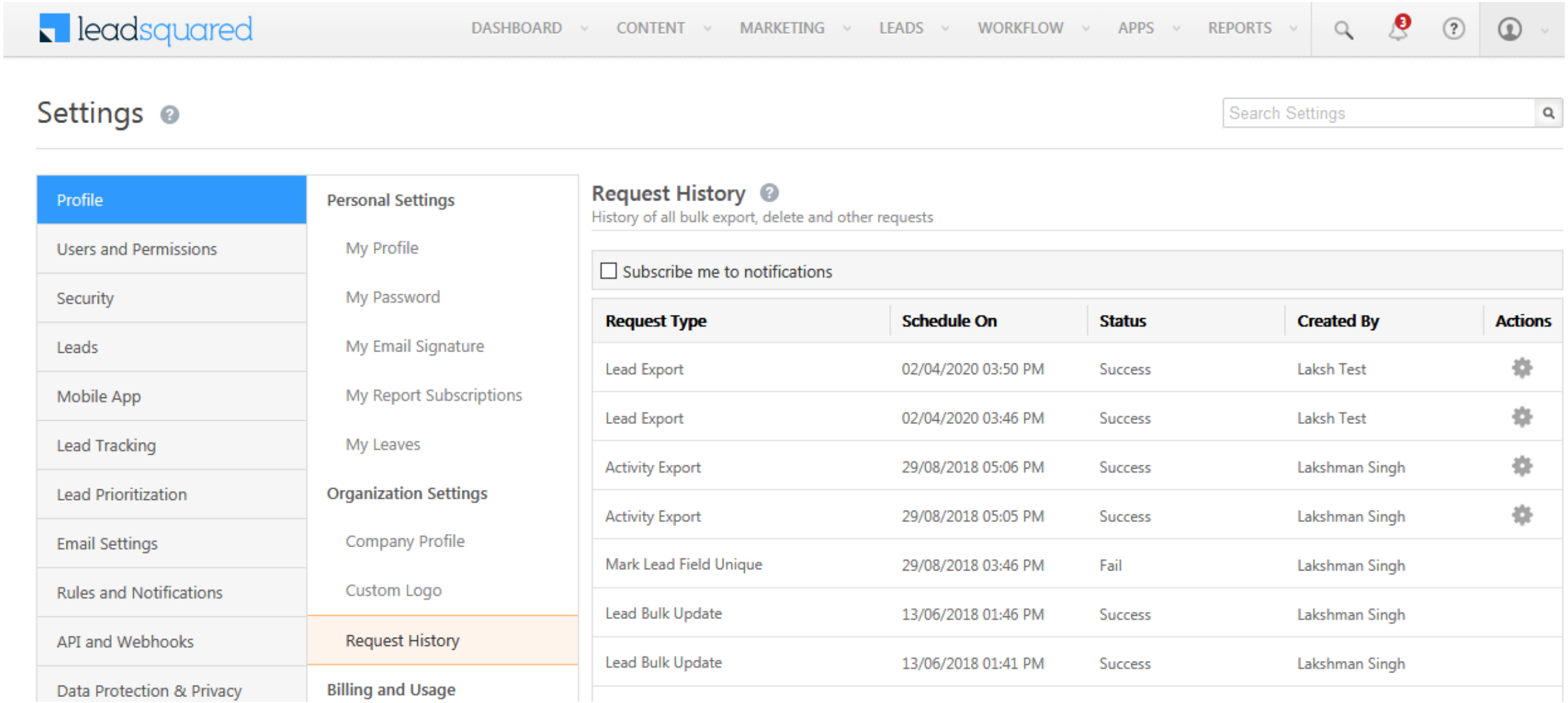


Reports > Audit Logs

Run the reports and review compliance



Request History



SECURE YOUR *API* CALLS (BEST PRACTICES)

Secure your API calls

- LeadSquared API's support latest encryption algorithms like TLS
- AccessKeys and SecretKeys are used for authentication – keep them secret
- IP Whitelisting – restrict the API request calls to a limited set of Ips
- Permission Templates to restrict API access
- Check your API logs here:
  My Profile>Settings>API and Webhooks>API logs

Land More Leads, Close More Deals

India’s most loved Customer Acquisition Platform

View LeadSquared reviews

Thank You