

Smarter Ways to access your Leads, Tasks & Activities in LeadSquared

Speaker

PraveenKumar Bayari

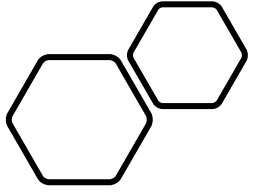
Customer Success Executive



What are we going to cover today?

- What are Smart Views & how can it benefit users from different industries?
- Traditional way
- Manage your leads, marketing activities & sales tasks all in one screen
- Automated reports on the key data points from your Smart Views
- Smart Views for Admin
- How to use Quick Search
- Custom Tab Connector & its use cases





Traditional Way



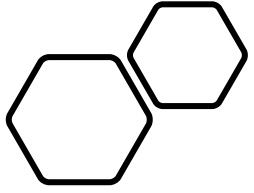
MANAGE LEADS &
QUICK FILTER



MANAGE ACTIVITIES



MANAGE TASKS



Why Smart Views?



Give you a bird's eye view



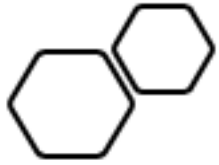
One screen for all your key information






Shows you the count of leads on each tab


















Easy to view custom named tabs




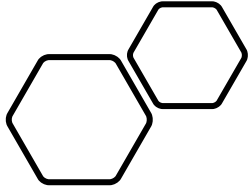
Smart Views

Smart Views   

 **My New Leads** 1 [Details](#)  My Leads with Pen... 3  My Engaged Leads 0  My Customers 4  My Tasks 1 

 Search Leads  Any Stage  Any Source  Vir  Last Activity  All Time   Actions 

<input type="checkbox"/> Lead Name	Lead Score	Lead Stage	Owner	Modified On	Actions
<input type="checkbox"/> ☆ ● George Lucas	0	Prospect	Vir	04/02/18 04:43 PM	



Lead Driven View



Students opting for a particular course



Leads with a budget of more than 50Lac and specific location



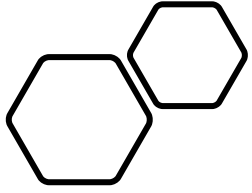
Patients by department



1. Leads based on the type of loan
2. Leads based on the insurance they want to opt for



Leads based on the destination



Activity Driven View



1. Students who have submitted the admission documents
2. Students who have paid the fees



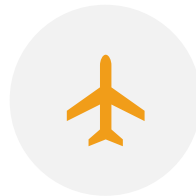
Leads who have completed the site visit activity



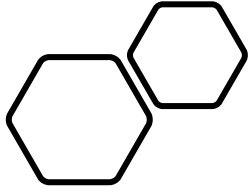
Appointment fixed



Leads with KYC document completed/pending



Leads with 'booking completed' and 'payment pending'.



Task Driven View



Track your team's day in day out tasks



Pending Task- View of tasks which are pending



Overdue Task- View of tasks which are overdue

Question

How can I filter existing leads who've re-submitted a form?

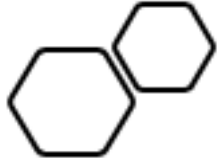
Person who showed interest in property A, and now looking to buy property B

ENT patient now has bone problems



Lead who showed interest in Health Insurance last year, is now ready to buy it

Student interested in Physics, now wants to study a Biology course



Smart Views for Admin

Settings ? Search Settings

Profile	Lead Settings
Users and Permissions	Lead Fields
Security	Dependent Lead Fields
Accounts	Lead Stages
Leads	Lead Sources
Mobile App	Rename Lead
Lead Tracking	Views
Lead Prioritization	Smart Views
Email Settings	Lead Forms
Rules and Notifications	Lead Forms

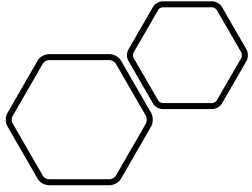
Smart Views ?

Manage and assign Smart Views

Search Smart Views Actions Create

Smart View Name	Code	Assigned Teams	Tabs	Modified By	Modified On ↓	Actions
Test	2		1 Tabs	Praveen Bayari	01/28/20 05:58 PM	
Sample View	1		5 Tabs	System	01/21/20 06:26 PM	

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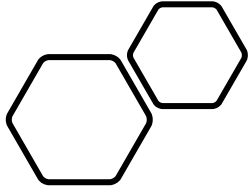


Quick Search

Works on

- First Name
- Last Name
- Email
- Phone Number
- Mobile Number
- Company
- City
- Country

Operators (+, -, *, " ")



Custom Tabs



Ticket Management



Company View



Pull data from other systems

E.g. Activities in student information systems



Real Estate example for sales users

View vacant rooms in apartments

Thank you! Any questions?

