LeadSquared for Admin Users
How can admin users get the best out of LeadSquared

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What are we going to cover today?

- **How to customize LeadSquared for your business**
  - Lead - fields, forms, sources, stages, activities & scores, revenue activities and more

- **How to connect your existing systems with LeadSquared**
  - Chat, website, ads, phone calls, emails and more

- **How to create and setup**
  - Tasks
  - Lead quality criteria & engagement score
  - Rules & notifications

- **User management features and what you can do with it**
Basic Settings To Get Started

✓ Create Users
✓ Create required Custom Lead Fields
✓ Create Custom Notable Activities
✓ Define Lead Stage Management & set up stages to move your leads through the lead funnel
✓ Manage Forms
✓ Sales Activity Settings
✓ Task Settings
Additional Settings

✓ Lead Prioritization
  ○ Lead Quality Criteria & Engagement Scoring

✓ Set up Lead Tracking
  ○ Tracking Script
  ○ Domain Settings (Website, Landing Page & Email domain)
  ○ DKIM and SPF Settings

✓ Email Settings

✓ User Management
Manage Users & Connect Apps

✓ Connect your Apps & Website with LeadSquared
  - Integrate your webforms
  - Chat Tools
  - Email Sync App
  - Distribute or Assign Leads automatically

✓ User Management
  - Teams
  - Work Day Templates (Availability of Users) – Check In Feature
  - Permission Templates
LeadSquared Getting Started Guide for Administrators

https://help.leadsquared.com/administrators/
Thank you! Any questions?

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