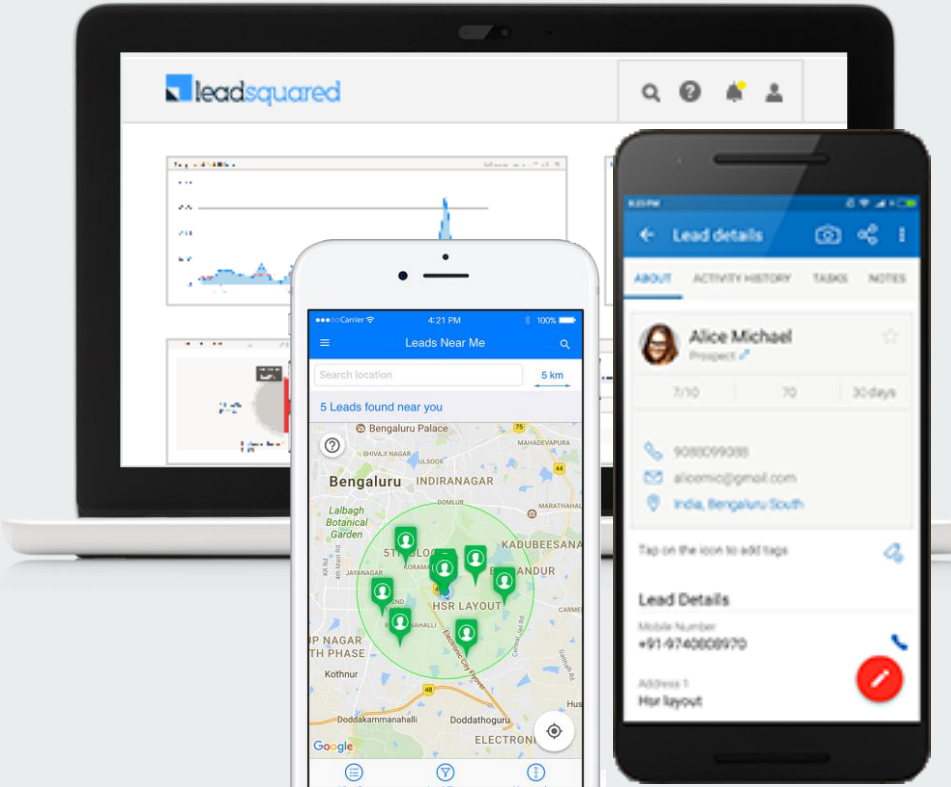
LeadSquared Mobile App

leadsquared



Agenda

- How Admins can set up Smart Views for their Teams
- Smart Views on Mobile
- What's new on Mobile
- Manage Activities & leads on the go with the task completion workflow

What will you learn?

- ✔ What's new in LeadSquared Mobile App?
  - Customized Home Screen - Choose how to set your home screen on launch.
  - Task Notifications - Get task notifications on creation, completion and when pending.
  - Activity Management - Manage your activities on the go, and more!
- ✔ Smart Views and what you can do with it [For Admin & Sales Users]
  - Manage leads & activities in one place by setting up views based on your favourite filters
- ✔ Simplifying the field sales process
  - How to automate you daily tasks - activity flow
  - Create custom menu options relevant for you
  - Track your leads and users on the map

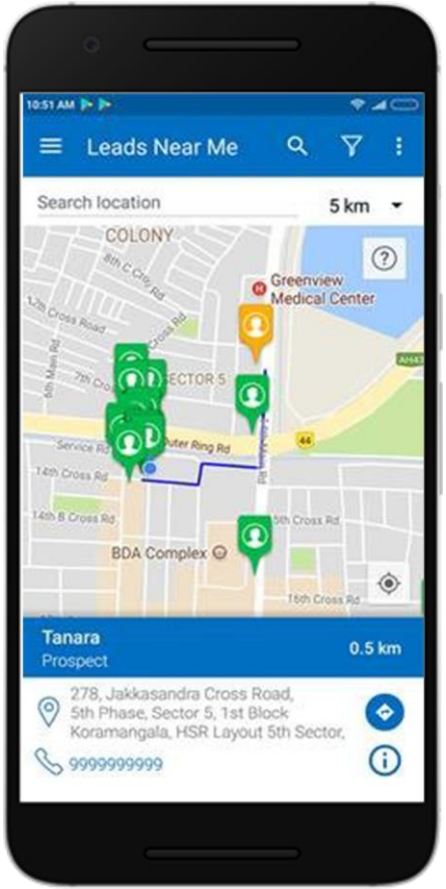
What's new on Mobile?

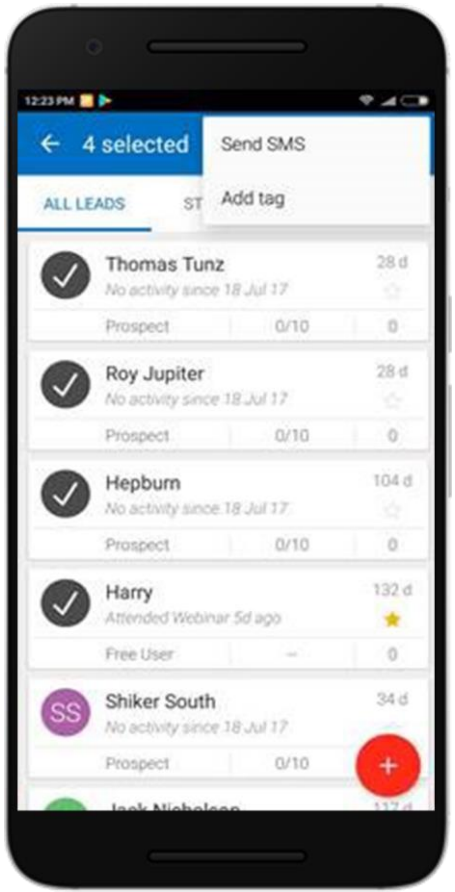
April 2018

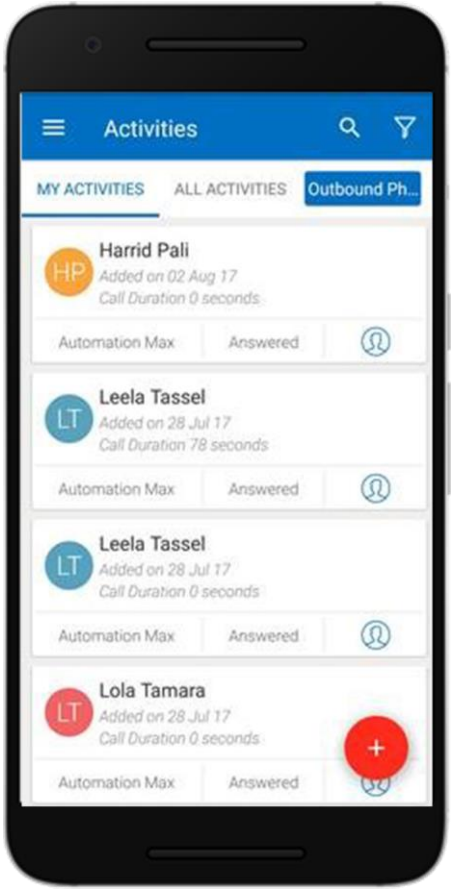
New things you might've missed

- Smart views on Mobile
- Setting your home screen
- Dial pad setting for calls from the web
- Notification on task creation
- Editing/Adding leads leads - Changing the view from the Web
- Searching in filtered results
- Managing your activities
- Updating location of leads & tracking activities with location
- Custom menu tabs on your app
- Reach out for Help whenever you need it!

10:11 AM
Update Lead Location
Save
126, 10th Main Road, Sector 6,
Address1
126, 10th Main Road, Sector 6, HSR Layout, Bengaluru,
City
Bengaluru
State
Karnataka
Country
India
Zipcode
560102
Current location is set


10:51 AM
Leads Near Me
Search location
5 km
COLONY
Greenview Medical Center
SECTOR 5
Outer Ring Rd
BDA Complex
Tanara
Prospect
0.5 km
278, Jakkasandra Cross Road, 5th Phase, Sector 5, 1st Block Koramangala, HSR Layout 5th Sector,
9999999999


12:23 PM
4 selected
Send SMS
Add tag
ALL LEADS
Thomas Tunz
28 d
No activity since 18 Jul 17
Prospect
0/10
Roy Jupiter
28 d
No activity since 18 Jul 17
Prospect
0/10
Hepburn
104 d
No activity since 18 Jul 17
Prospect
0/10
Harry
132 d
Attended Webinar 5d ago
Free User
Shiker South
34 d
No activity since 18 Jul 17
Prospect
0/10


Activities
MY ACTIVITIES
ALL ACTIVITIES
Outbound Ph...
Harrid Pali
Added on 02 Aug 17
Call Duration 0 seconds
Automation Max
Answered
Leela Tassel
Added on 28 Jul 17
Call Duration 78 seconds
Automation Max
Answered
Leela Tassel
Added on 28 Jul 17
Call Duration 0 seconds
Automation Max
Answered
Lola Tamara
Added on 28 Jul 17
Call Duration 0 seconds
Automation Max
Answered

Simplify Sales & Marketing with Automation

Automate daily tasks like, assigning leads, creating tasks, setting up campaigns with automated workflows

TRY IT FREE

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