Masterclass on Activity Management

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Agenda

➢ What is an activity in LeadSquared & some examples of the same.

➢ How to create an Activity with Custom Fields.

➢ Adding Activities against a lead via "Manage Leads" page & "Manage Activity" page.

➢ How to manage Lead Activities.

➢ What are the "Activity Trigger Events"?

➢ Examples of industry-specific use cases.
What is an activity?

Activities are different steps or actions to complete the business flow.

Types of Activities:
1. System activities.
2. Custom Activities.
Example business flow
How important activities are?

• Activities will help you to understand the interest of the lead towards your product or service.

• Activities will help you to prioritize the lead and close more deals.
Creating custom activities with fields.
Adding an activity
Activity distribution
Managing activities

• Grid Management.
• Filters.
• Advance search.
• Export, import, update and delete.
Activity trigger events

- Webhooks.
- Rules and Notifications.
- Automation.
Had a Phone Conversation

ACTIVITY TRIGGER

Create a Task and fix an appointment

ACTION

Student told to visit the campus, on 26th April, 2018 at 3 p.m.

26 April, 2018 ; 2.30 p.m. : Site Visit Scheduled for Amit
ACTIVITY TRIGGER

Activity is added as Document Collection with Notes

ACTION

Email Notification with Address, Appointment Date is sent to the user
Tour package accepted – with discount

User agreed for the package with discount.

Email Sent to the client.

Email with all package details sent to the client.
Thank you!!