Smarter Ways to Filter

Leads, Tasks, Reports & Activities in LeadSquared

Speaker

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Technical Writer

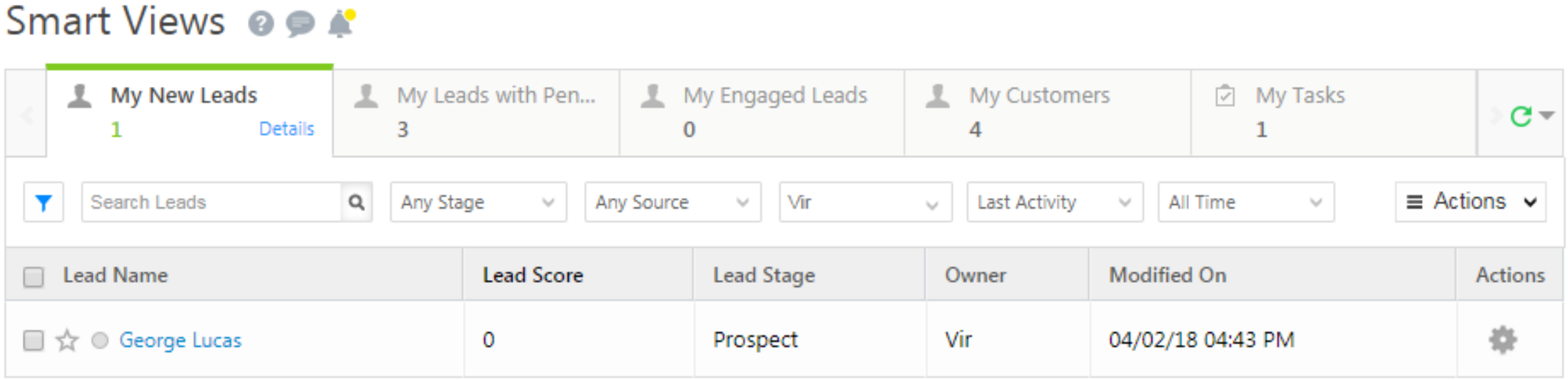
leadsquared

WEBINAR

What are we going to cover today?

- **What are Smart Views & how can it benefit users from different industries?**
  - Industry Use Cases
  - Smart Views for Admins
  - Smart Views on Mobile
- **The right way to use Quick Search**

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
Lead Name
Lead Score
Lead Stage
Owner
Modified On
Actions
George Lucas
0
Prospect
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Poll

Why Smart Views?

- Leads
- Activities
- Tasks

Give you a bird’s eye view

- Single Work Area
- Create and save your favourite filters

Education

- **Students by the degrees they're interested in**
  - Science
  - Arts
  - Business, etc.

- **Students that are most eligible for certain programmes**
  - Based on school grades
  - Based on different standardized tests

Real Estate

- **Leads by Budget and Apartment Type**
  - Interested in property below 50 lakhs
  - Above 1 crore

- **Site Visit Activities**
  - Site visits scheduled today
  - Site visits scheduled today in a particular location

Finance

- **KYC Status**
  - Documents Pending
  - Approved
  - Failed

- **Insurance Type – Life, Health Car, etc.**

- **Loan Type – Home, Car, etc.**

Medical / Healthcare

- **Patients by doctor**
  - Make use of dependent fields
- **By Department**
  - Cardiology
  - ENT etc.

Travel

- **By Location**
  - USA
  - Europe
  - Canada, etc.

- **By Holiday Package**
  - Combining location and budget

Question

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

Travel Customer who didn't go on the previous trip to China. Now wants to go to Japan

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

ENT patient now has bone problems

Student interested in Physics now wants to study a Biology course

Poll

Smart Views for Admins

- **Distribute Views to Teams**
- **Smart Views on Mobile**

Quick Search

- **Works on**
  - First Name
  - Last Name
  - Email
  - Phone Number
  - Mobile Number
  - Company
  - City
  - Country

- **Operators (+, -, *, “ “)**

Thank you! Any questions?

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