Smarter Ways to Filter Leads, Tasks, Reports & Activities in LeadSquared
What are we going to cover today?

- **What are Smart Views & how can it benefit users from different industries?**
  - How to manage leads, marketing activities & sales tasks all in one place
  - How to setup views based on your favourite filters
  - How to get daily reports on the views you create

- **The right way to use Quick Search**

- **Custom Tab Connector & its use cases**
  - How to show support tickets of leads stored in external systems (like Zendesk, Freshdesk and so on) as a separate tab in "Lead Details"
  - How to display a tab in "Lead Details" for the properties, products or programmes, a lead is interested in
### Smart Views

<table>
<thead>
<tr>
<th>Smart Views</th>
<th>My New Leads</th>
<th>My Leads with Pen...</th>
<th>My Engaged Leads</th>
<th>My Customers</th>
<th>My Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>My New Leads</td>
<td>1</td>
<td>Details</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My Leads with Pen...</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My Engaged Leads</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My Customers</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My Tasks</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Search Leads**

<table>
<thead>
<tr>
<th>Lead Name</th>
<th>Lead Score</th>
<th>Lead Stage</th>
<th>Owner</th>
<th>Modified On</th>
</tr>
</thead>
<tbody>
<tr>
<td>George Lucas</td>
<td>0</td>
<td>Prospect</td>
<td>Vir</td>
<td>04/02/18 04:43 PM</td>
</tr>
</tbody>
</table>

**Actions**
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
• **Leads by Budget**
  • Interested in property below 50 lakhs
  • Above 1 crore

• **Site Visit Tasks**
  • Site visits scheduled today
  • Site visits scheduled today in a particular location
• **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
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?