

LEAD MANAGEMENT





LEAD RECAP





Who is a lead?

- A person who buys the product?
- A person who is selling the product?
- A person who has shown interest in your product?



LEAD FIELDS



Lead Fields

Lead Fields are the specific fields where you store the details of the Lead that are relevant for your business need. For example: First name, Last name, Phone number etc.

The screenshot displays the 'Lead Details' page for a lead named 'Captain America'. The page is divided into several sections:

- Lead Card:** Shows the lead's name, status (Prospect), and three metrics: Lead Score (0), Disengaged (0), and Lead Quality (0).
- Lead Properties:** A table showing lead attributes.
- Lead Details:** A table listing various lead fields and their values.

A blue bracket on the right side of the 'Lead Details' table points to the text 'Lead Fields'.

Lead Properties	
Owner	Peeyush pavanan
Lead Source	Social Media
Lead Age	20 Days

Lead details	
Lead Number	1003
First Name	Captain
Last Name	America
Do Not Email	No
Do Not Call	No
Lead Source	Social Media
Engagement Score	0
Lead Score	0
Lead Stage	Prospect

There are core lead fields comes with the LeadSquared application and custom fields which are generally created business to business by the admins during the customization to meet the business requirement.

Lead Field Settings

The screenshot shows the 'Settings' page with a sidebar on the left containing various settings categories. The 'Customization' category is selected, and the 'Lead Fields' sub-category is active. The main content area is titled 'Create Lead Field (Custom)' and contains the following sections:

- Custom Lead Field:**
 - Display Name:** A text input field. Annotation: "It will appear as label of the custom lead field".
 - Include Field in Section:** A dropdown menu currently set to 'Lead Details'. Annotation: "Where this field should appear in Lead Detail".
 - Mail Merge Default Value:** A text input field.
- Input Data Properties:**
 - Data Input Type:** A dropdown menu currently set to 'Text'. Annotation: "Data type for the custom Lead Field".
 - Show as:** A dropdown menu currently set to 'Textbox'. Annotation: "How input field should appear in User Interface?".
 - Maximum Length:** A numeric input field set to '50'.
- Lead Field Properties:**
 - ☐ Is Mandatory
 - ☒ Show in Import
 - ☐ Use in Lead Clone
 - ☐ Show in Quick Add
 - ☐ Include in Mail Merge
 - ☐ Lock after Create

Annotations on the right side of the form explain the purpose of several fields: 'Display Name' (label), 'Include Field in Section' (location), 'Data Input Type' (type), 'Show as' (UI appearance), and 'Lead Field Properties' (validation and function).

Different types of Data Input with respective settings for custom leads are:

1. Text: Textbox or Textarea
2. Number: Decimal or Integer
3. Email: Email
4. Phone: Textbox or Phone Control
5. Website: Url
6. Date: Date or Date Time
7. Time: Time
8. Dropdown: Dropdown, Searchable Dropdown or Dropdown with others
9. Multi-select Dropdown: Multi-select Dropdown
10. Boolean: Radio or Checkbox

Further settings for

Phone: With Phone Control option you can restrict Phone numbers length by defining maximum and minimum integer

Dropdown: You can have...

...Searchable dropdown values. You can key in the text field and see the relevant options available, matching the letters entered

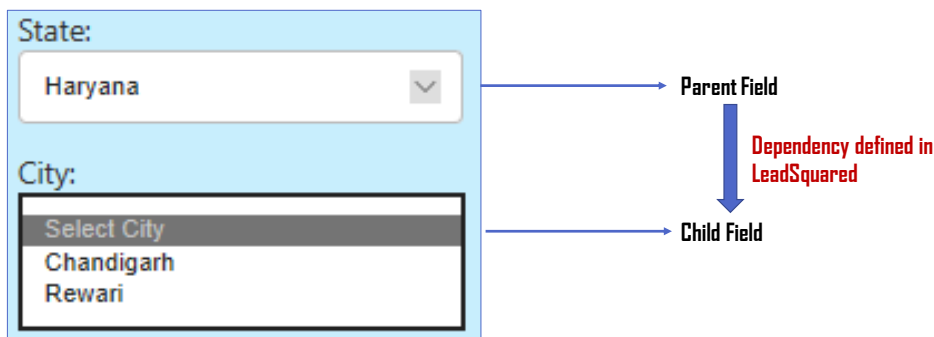
...and dropdown with others. This dropdown field will have **Others** as a default option

along with the list of options provided.

Dependent Lead Fields

In LeadSquared, you can create a dependency between two or more drop-down lead fields.

For example: By selecting a value in State field, City field would show you the relevant options. In this scenario, State field will become the parent field and City field will be the child field



This feature allows you to create a dependency between two or more drop-down lead fields. You can create dependency between any two drop-down lead fields by selecting them as the parent and the child fields, respectively. This dependency can be used in the various Lead Create forms of LeadSquared.

Creating Dependent Lead Fields

The screenshot displays the 'Dependent Lead Fields' configuration page. On the left, a sidebar menu includes 'Profile', 'Users and Permissions', 'Security', 'Customization' (highlighted), and 'Mobile App'. Under 'Customization', 'Lead Settings' is expanded, showing 'Lead Fields', 'Dependent Lead Fields' (highlighted), 'Lead Stages', and 'Lead Sources'. The main content area is titled 'Dependent Lead Fields' with a subtitle 'Create dependencies between two dropdown fields'. It features a table with columns 'Parent field', 'Child field', 'Modified By', and 'Actions'. The table is currently empty, showing 'No records to display.' A red box highlights a 'Create' button in the top right corner of the table. A red arrow points from this button to a modal window titled 'Create Dependent Lead Field'. The modal contains the instruction 'Select parent and child field to create dependency, Step 1 of 2'. It has two dropdown menus: 'Select Parent Field' with 'Country' selected, and 'Select Child Field' with 'Time Zone' selected. A 'Next >' button is at the bottom right of the modal.

Parent field	Child field	Modified By	Actions
No records to display.			

Create Dependent Lead Field

Select parent and child field to create dependency, Step 1 of 2

Select Parent Field: Country

Select Child Field: Time Zone

Next >

To create Dependent Lead Fields, first you need to identify the parent and child field. You can find the list of Lead Fields by going to Settings → Customization → Lead Fields under Lead Settings

Once the parent and child fields are identified, navigate to Dependent Lead Fields from Settings → Customization → Dependent Lead Fields and click on Create button to create the dependent lead fields

Creating Dependent Lead Fields

The screenshot shows a multi-step process for creating dependent lead fields. The main window is titled "Update Dependent Lead Field" and has a subtitle "Map Parent and Child dropdown fields". It contains three overlapping panels, each for a different state:

- Karnataka:** The "Select a States" list shows Karnataka, Tamil Nadu, and Maharashtra. The "Provide Cities values for Karnataka" field contains "Bengaluru" and "Mysore".
- Tamil Nadu:** The "Select a States" list shows Karnataka, Tamil Nadu, and Maharashtra. The "Provide Cities values for Tamil Nadu" field contains "Chennai" and "Coimbatore".
- Maharashtra:** The "Select a States" list shows Karnataka, Tamil Nadu, and Maharashtra. The "Provide Cities values for Maharashtra" field contains "Mumbai" and "Pune".

At the bottom of the main window, there is a "Cancel" button and a "Save" button. A small orange icon with the text "Unsaved parent field values" is also visible.

- Once you have selected the Lead fields for Parent and Child, click on Next.
- In the next window, you will see parent column and child column.
- In the Parent Column, you will see the options defined in the Lead field mapped to Parent field. Select individual fields and define the values to be displayed in the Child Field by writing it manually in Child Column.
- Do the same for all the parent values one by one.
- Once, the child values are defined for all the parent values, click on Save. You have successfully created the dependent lead fields.



Lead Fields

In this assignment, you will be

- Creating custom lead fields
- Creating dependent Lead fields

In our case of S.H.I.E.L.D. you will have to create four custom lead fields.

1st Lead Field: Superhero Power: This lead field must be multi-dropdown with following values: Super Speed; Super Strength, Agility, Flight, Immortality, Invisibility, Teleportation, X-ray Vision, Telepathy and Regenerative Healing Power

2nd Lead Field: Superhero Rating: This field should be dropdown but not multi-dropdown with following values: 1, 2, 3, 4, 5, 6, 7, 8, 9 and 10.

3rd Lead Field: Credit Rating: This field should be dropdown dependent on Superhero Rating field with following values:

- if the Superhero rating is 1 – 100, 150, 200
- if the Superhero rating is 2 – 200, 250, 300
- if the Superhero rating is 3 – 300, 350, 400
- if the Superhero rating is 4 – 400, 450, 500
- if the Superhero rating is 5 – 500, 550, 600
- if the Superhero rating is 6 – 600, 650, 700
- if the Superhero rating is 7 – 700, 750, 800
- if the Superhero rating is 8 – 800, 850, 900

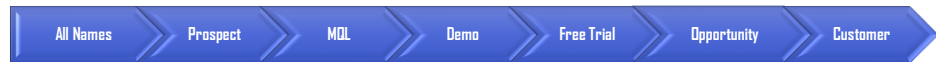
- if the Superhero rating is 9 – 900, 950, 1000
- if the Superhero rating is 10 – 1000, 1050, 1100

4th Lead Field: **Superhero Name:** This field should be text.



Example of Lead Stages from Tech Industry

SaaS Vendors



Independent Software Vendors (ISV)



IT Consulting Companies



As we learned in Sales Funnel and Lifecycle Marketing concepts a consumer goes through various stages before purchasing the product/services.

Thus, it is important to identify at which stage the leads are in order to take appropriate action to convert the lead into a customer or loyal customer.

LeadSquared allows you to identify the leads with standard or custom lead stages as per the client's requirement.

As the customer journey continues from one stage to another respective activities and task can be assigned automatically or manually as per the client's requirement. In above slides, you can see the typical lead stages a consumer moves in Tech Industry

Managing Lead Stages

As a first step, Navigate to: **Settings → Customization → Lead Stages**. You would see the Stages Classified as **Active & Inactive Stages**.

The screenshot shows the 'Lead Stages' management interface. On the left is a sidebar menu with options: Profile, Users and Permissions, Security, Customization (highlighted), Mobile App, Lead Tracking, and Lead Prioritization. The main area is divided into two columns. The left column, titled 'Lead Settings', contains 'Lead Fields', 'Dependent Lead Fields', 'Lead Stages' (highlighted), 'Lead Sources', 'Views', and 'Smart Views'. The right column, titled 'Lead Stages', has a sub-header 'Manage Lead Stages'. It includes a 'Schema Name' field with 'ProspectStage' and a 'Display Name' field with 'Lead Stage'. Below these are two lists: 'Active Stages' and 'Inactive Stages'. The 'Active Stages' list contains 'Prospect', 'Opportunity', and 'Customer' (highlighted in green). The 'Inactive Stages' list contains 'Disqualified' and 'Invalid'.

You can add, delete or rename any of the existing lead stages. Final Stage however cannot be deleted/removed

Lead Stages help you with the following:

- Keep track of Leads at various levels of Sales/Marketing Cycle/Funnel.
- Qualify Leads and move junk leads to Inactive Stages thereby refining your Leads to be worked on.
- Leads at different levels can be engaged with relevant Nurturing content and methods

By default, LeadSquared is configured with three fundamental Lead Stages:

- Prospect
- Opportunity
- Customer

Lead Stages may vary from company to company and industry to industry. Keeping this variation in mind, **LeadSquared allows you to customize and add Lead Stages relevant for your business needs.**

The **Active Stages** are linked to the **Overall Lead Funnel** available on **Administrator Dashboard**. Overall Lead Funnel shows leads in different Active Lead Stages. This helps in easy monitoring of Leads in various levels in the business process.

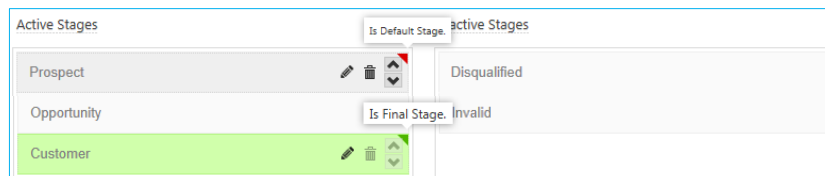
Default and Final Stage

Default Stage

- When a New Lead is created in your account by any mode (Manual or Automated) it can be attributed a **Default Stage**.
- Default Stage is tagged with a **Red Indicator** at the corner.
- You can set any Custom Stage as Default by editing it and marking it as Default

Final Stage

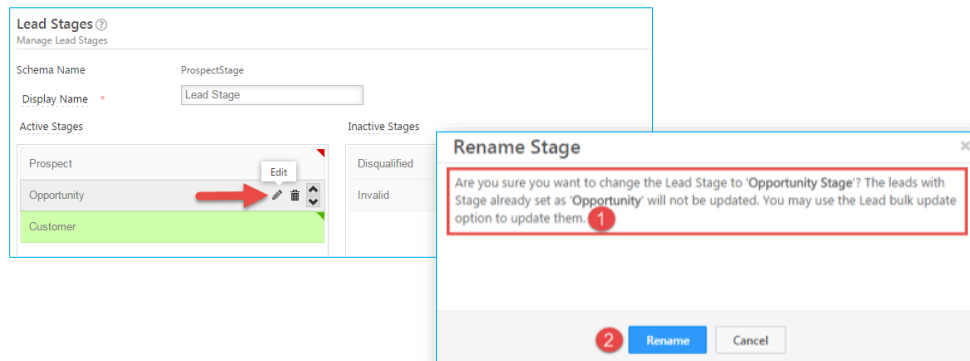
- The final stage in Sales Funnel typically corresponds to Leads that have converted to be **Customers** for your business.
- You may however Rename the Final Stage as per your business needs if required.
- Final Stage can not be deleted/Removed.



- Prospect Stage in pre-set as the Default Stage in your LeadSquared account.
- By default Final Stage is named as Customer in LeadSquared Account

Renaming Lead Stage

To rename or Modify a Lead Stage, click on Edit icon next to the lead stage name



Note: Before Modifying the Stage name kindly make sure that no leads are attributed with the Stage being modified. In case the lead stage is being renamed, the existing leads which are assigned with old values will not be auto-updated. Hence, you can do lead bulk update by exporting the existing leads into excel and updating the lead stage names followed by importing it back to the system.

Reorder Lead Stages

You can **Reorder** or **Change the sequential listing** of Lead stages as per your requirement.

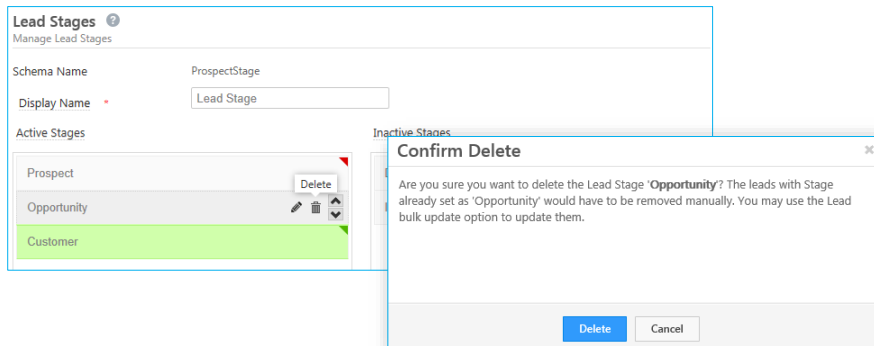
Stages can be moved up and down using the Up-Down icons on Each Stage as shown in the Image below

The screenshot displays the 'Lead Stages' management interface. At the top, there's a header 'Lead Stages' with a help icon and a subtitle 'Manage Lead Stages'. Below this, there are two input fields: 'Schema Name' with the value 'ProspectStage' and 'Display Name' with the value 'Lead Stage'. The interface is divided into two main sections: 'Active Stages' and 'Inactive Stages'. The 'Active Stages' section contains a list of stages: 'Prospect', 'Opportunity', and 'Customer'. The 'Opportunity' stage is highlighted in grey, and a 'Move Up' button is visible next to it. The 'Inactive Stages' section contains a list of stages: 'Disqualified' and 'Invalid'. A red box highlights the 'Move Up' button and the 'Opportunity' stage, indicating the action being performed.

Active Stages	Inactive Stages
Prospect	Disqualified
Opportunity	Invalid
Customer	

Delete Lead Stages

You may delete a Lead Stage by clicking the **Delete Icon** available on the Stage Name.



Note: Kindly make sure that No leads are associated with the Stage before deleting it.

On clicking You will see a confirmation popup where you can confirm **Delete** operation. In case the lead stage is being deleted, the existing leads which are assigned with stage being deleted will not be auto-updated. Hence, you can do lead bulk update by exporting the existing leads into excel and updating the lead stage names followed by importing it back to the system.

Comments on Stage Transition

To enable comments on Stage Change → Select the **Check box** > You will see **Settings** button.

1. You may modify and specify the Label name.
2. Choose the data input type as **Text Area** or **Dropdown** for the Comments field. If you select Dropdown, you can specify the options.
3. You may make it mandatory for the Users to add a reason/comment while changing Lead's Stage.
4. Click **Save** to complete configuration.

The image displays three overlapping screenshots of a software interface for configuring comments on stage transitions.

- The topmost window is titled "Comments on Stage Change" and contains a checked checkbox labeled "Enable Comments on Stage Change" and a blue "Settings" button.
- The middle window is titled "Comment Setting" and shows:
 - Label ***: A text input field containing "Change Comment".
 - Type**: A dropdown menu currently set to "Text Area".
 - Is Mandatory**: A checked checkbox.
- The bottom window is also titled "Comment Setting" and shows:
 - Label ***: A text input field containing "Change Comment".
 - Type**: A dropdown menu currently set to "Dropdown".
 - Options ***: A text area containing three lines: "**Follow Up", "Need more information", and "Ready to buy".
 - Is Mandatory**: A checked checkbox.
 - At the bottom, there are "Save" and "Close" buttons.
 - Below the options text area, a small note reads: "Enter one option per line. The option which begins with ** will be default."

You can enable *Comments on Stage Change* so that your Users can add a Note/Reason while changing the Lead's Stage in your Sales/Marketing Funnel.

Note: **Change Comment** Field will be seen on **Change Stage** popup while performing Lead Stage Change for a lead from Manage Leads or Lead Details page.



Lead Stages

In this assignment, you will be

- Creating custom lead stages
- Enabling lead stage transition comments with text

For our use case; create following lead stages:

Active Stages:

New Superheroes (Default stage)

Prospect

Opportunity

Superheroes Onboarded (Final stage)

Inactive Stages:

Villain

Disqualified

Invalid

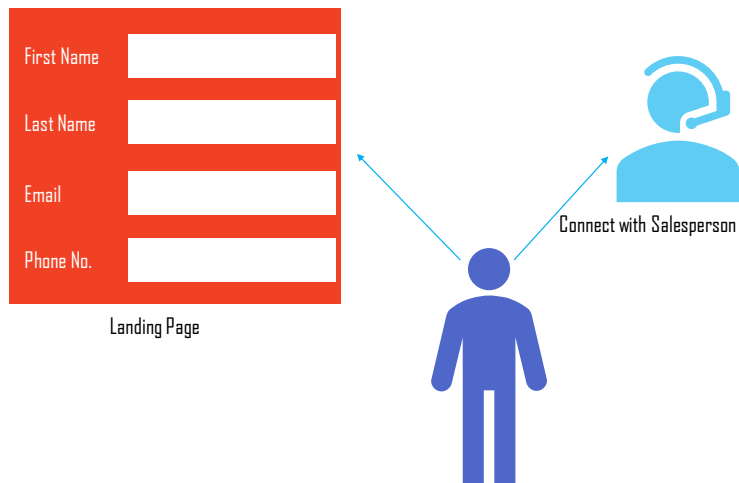
Also, enable lead stage transition comments.



LEAD DUPLICATION



Lead Duplication



Considering Leads can be generated in many ways, lead duplication is one of the scenarios that may occur in real life, but we have ways to handle that in LeadSquared system.

For example: a user may have submitted his/her details when the sales user called and later submitted his/her details on the landing pages.

Since, LeadSquared has the provision to capture leads from phone call as well as from landing page and other channels, the details shared by the user can get duplicated unless you configure ways to counter that to ensure captured leads does not create duplicate records in the LeadSquared if already existing in the database of LeadSquared.

In coming few slides, we will see how to handle duplicate leads.

How to handle Lead Duplication?

Some of the best practices that could be followed to ensure duplicate leads are not created in the LeadSquared system are:

1. Have a unique field, like: Email, Phone number or any custom field etc.
2. While importing the Leads from CSV file to LeadSquared system, you can
 - Ignore duplicates
 - Overwrite duplicates
 - Update empty fields of duplicates

As a pre-requisite determine the unique lead field which would be validated by the LeadSquared system before adding a record into the LeadSquared database like, Email or phone number or custom lead fields like PAN number etc.

This unique field will be validated by LeadSquared system no matter from where the leads are getting generated, like Facebook plugin, Landing page or manual entry.

However, another scenario arises during Lead Import where in the CSV file is imported into the LeadSquared system. Considering the file imported may or may not contain already existing leads, system gives you a checkpoint during import asking how to handle the lead duplicates.

This could be either ignore duplicated, overwrite duplicates or update empty fields of duplicates.

- **Ignore duplicates:** If you select this option, duplicate records will **not** be imported. This is the default option that is pre-selected.
- **Overwrite duplicates:** If you select this option, the CSV file data will overwrite the data in your LeadSquared account.

- **Update empty fields of duplicates:** With this option, only empty fields of the duplicate records in LeadSquared will be updated with the data in the CSV file.

Following link talks about how to make a custom lead field like PAN number etc as unique field: <https://help.leadSquared.com/how-to-make-a-custom-field-unique-in-your-leadSquared-application/>

Lead Sources



Lead Sources

Lead sources are the avenues through which leads come to your website.

You can add, remove and customize your lead sources

By default, you'll find the following lead sources in your account -

- Organic Search
- Referral Sites
- Direct Traffic
- Social Media
- Inbound Email
- Inbound Phone Call
- Outbound Phone Call
- Email Marketing
- Pay per click Ads

These lead sources are relevant to most businesses. You can however add your own lead sources.



MANAGE LEAD



Manage Leads

The *Managed Leads* window allows you to update the list of leads based on criteria defined by you

Manage Leads

Search Leads

q

?

Advanced Search

Tags

Actions

Select Columns

Lead Stage	New Lead	Lead Source	Ambassador	Owner	Any	Date Range	Last Activity	All Time	
Lead Name	Phone Number	Email	Destination phone number	Lead Stage	Owner	Modified On	Lead Status		
<input type="checkbox"/> ☆ Test smita	+91-912020202025	smitatest+bsd5@karmagroup.com		New Lead	Hosanna David	13/08/2019 05:53 PM	INI En		
<input type="checkbox"/> ☆ Test KB	+91-915050505014	karolina.ballonyte+hsq14@karmagroup.com		New Lead	Hosanna David	12/08/2019 04:20 PM	INI En		
<input type="checkbox"/> ☆ Test KB	+91-915050505013	karolina.ballonyte+hsq13@karmagroup.com		New Lead	Hosanna David	12/08/2019 04:17 PM	INI En		
<input type="checkbox"/> ☆ Test KB	+91-5050505012	karolina.ballonyte+hsq12@karmagroup.com		New Lead	Hosanna David	12/08/2019 04:13 PM	INI En		
<input type="checkbox"/> ☆ test-final t	+91-4545654654	test-final@karmagroup.com		New Lead	Hosanna David	02/07/2019 12:33 PM	INI En		
<input type="checkbox"/> ☆ Test-amb-utm test	+91-5566778899	Test-amb-utm@karmagroup.com		New Lead	Hosanna David	02/07/2019 12:12 PM	INI En		

You can also add and delete the other columns in the Manage Lead grid view by clicking on Select Columns icon.

From this page as a user, you can do following actions:

- Filter leads
- Create New Fields
- Import Leads
- Create Lead List
- Advanced Lead Search

We will cover all of them one by one in coming few slides.

Manage Leads – Advanced Search

The screenshot displays the 'Manage Leads' interface. At the top, there is a search bar with a magnifying glass icon and a red box highlighting the 'Advanced Search' link. Below the search bar is a table of leads with columns: Lead Stage, Lead Source, Owner, Date Range, Last Activity, and All Time. The table contains four rows of lead data. An 'Advanced Search' modal is open in the foreground, showing a 'Select Search Criteria' section with dropdowns for 'Lead Activity', 'Is', and 'Select Activity'. There are 'Add' and 'Reset' buttons. To the right, there is a section for 'Search for Leads that match' with radio buttons for 'Any Criteria' (selected) and 'All Criteria'. Below this, it says 'No Search Criteria is Selected'. At the bottom of the modal, there are buttons for 'Find Leads', 'Cancel', and 'Save as Quick Filter' (highlighted with a red box).

Lead Stage	Lead Source	Owner	Date Range	Last Activity	All Time		
<input type="checkbox"/> ☆ Pankaj Choudhary	+91-9982105005	pavayaassociates@gmail.com		New Lead	System	14/08/2019 12:36 PM	
<input type="checkbox"/> ☆ Aarti Shinde	+91-918097480150	aaryashinde2822@gmail.com		New Lead	Hosanna David	14/08/2019 12:35 PM	IND FB Ch
<input type="checkbox"/> ☆ sangeta vijay	+91-9819602197	sangeta.m1984@gmail.com		New Lead	System	14/08/2019 12:25 PM	
<input type="checkbox"/> ☆ test umita	+91-9120202020	smitatest+bu7@karmagroup.com					

While Manage Leads page allows to search leads based on four parameters combination: Lead Stage, Lead Source, Owner and Date Range

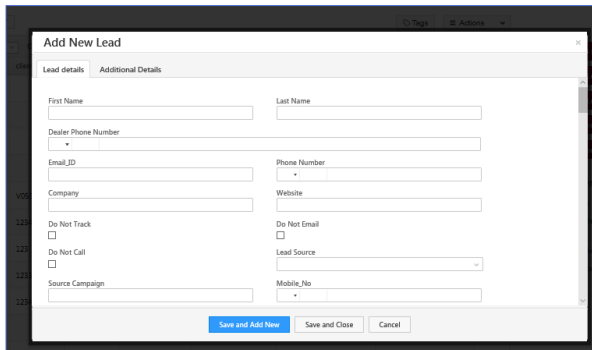
Advanced Search allows to do implement multiple criteria with and/or combination. The search criteria could also be saved as Quick Filter which allows you to access the search criteria defined immediately.

Quick Add Lead Button

The screenshot displays the 'Manage Leads' interface. On the left, a modal window titled 'Add New Lead' is open, featuring input fields for 'Email ID', 'Last Name', 'Website', 'Notes', 'First Name', 'Phone Number', and 'Lead Source'. At the bottom of this modal are three buttons: 'Save and Add New', 'Save and Close', and 'Cancel'. To the right of the modal, a vertical sidebar contains a red button labeled '+ Quick Add Lead' at the top, followed by four light purple buttons: '+ Add New Lead', 'Add New Lead' (with a plus icon), 'Import Leads' (with a plus icon), and 'Import Lead Tags' (with a plus icon).

By Clicking on Quick Add Lead button, the system will open the Lead form right above the list of the leads with basic fields allowing the end users to add the leads with minimum required information.

Add New Lead from the same window



The screenshot shows a 'Add New Lead' pop-up window with two tabs: 'Lead details' and 'Additional Details'. The 'Lead details' tab is active, showing a form with the following fields:

- First Name (text input)
- Last Name (text input)
- Dealer Phone Number (text input with a dropdown arrow)
- Email_ID (text input)
- Phone Number (text input with a dropdown arrow)
- Company (text input)
- Website (text input)
- Do Not Track (checkbox)
- Do Not Email (checkbox)
- Do Not Call (checkbox)
- Lead Source (dropdown menu)
- Source Campaign (text input)
- Mobile_No (text input with a dropdown arrow)

At the bottom of the form are three buttons: 'Save and Add New' (highlighted in blue), 'Save and Close', and 'Cancel'.

+ Quick Add Lead

+ Add New Lead

+ Add New Lead

+ Import Leads

+ Import Lead Tags

By Clicking on the highlighted button, LeadSquared system will open a pop-up window which will allow the Sales User to add leads with detailed information.

Add New Lead from new window

The screenshot shows the 'Add New Lead' form in the LeadSquared system. The form is titled 'Add New Lead' and is divided into two main sections: 'Lead details' and 'Additional Details'. The 'Lead details' section contains fields for First Name, Last Name, Mobile Phone Number, Email ID, Phone Number, Website, Do Not Email, Do Not Call, Do Not Text, Social Campaign, Source Medium, Job Title, and Source. The 'Additional Details' section is currently empty. To the right of the form is a sidebar with buttons: 'Quick Add Lead', 'Add New Lead', 'Add New Lead' (highlighted in red), 'Import Leads', and 'Import Lead Tags'.

By Clicking on the highlighted button, LeadSquared system will open a new window which will allow the Sales User to add leads with detailed information. It is like the previous action button except that it will open the add leads page in new window, thus allowing the Sales User to work with Manage Leads page at the same time as adding the new leads.

Lead Forms

You can customize the various Lead Forms and add or remove the Lead Fields as per your Requirement

- Lead vCard
- Quick Add Lead Form
- Add New Lead Form

Lead Forms ⓘ
Manage lead edit, quick add, mobile and other forms

Select form to edit: Create Quick Add Form Create Custom Field

Lead Details	
First Name <input type="text" value="FirstName"/>	Last Name <input type="text" value="LastName"/>
Email Id <input type="text" value="EmailAddress"/>	States2 <input type="text" value="mx_States2"/>
Cities <input type="text" value="mx_Cities"/>	Phone Number <input type="text" value="Phone"/>
superhero villians * <input type="text" value="mx_superhero_villians"/>	Age * <input type="text" value="mx_Age"/>
Lead Source <input type="text" value="Source"/>	

Hidden Fields
Search Field <input type="text" value=""/>
Account <input type="text" value="RelatedCompanyId"/>
Address 1 <input type="text" value="mx_Street1"/>
Address 2 <input type="text" value="mx_Street2"/>
admission req <input type="text" value="mx_admission_req"/>
all dads info <input type="text" value="mx_all_dads_info"/>

Import Leads

The screenshot displays the 'Import Leads' interface. On the left, a modal window titled 'Import Leads' is open, showing a progress bar with four steps: 'Select File', 'Map Fields', 'Preview', and 'Import'. The 'Select File' step is currently active. Below the progress bar, there is a 'Select File' section with a text input field for the file name and a 'Upload File' button. To the right of the modal, a sidebar menu is visible with the following items: 'Quick Add Lead', 'Add New Lead', 'Add New Lead', 'Import Leads' (highlighted in red), and 'Import Lead Tags'.

The Import Leads button, allows the end user to import the leads from the CSV files and mapping the CSV fields with the fields in LeadSquared Lead fields. This functionality comes handy if you must bulk update to the Leads.

Import Lead Steps

Step 1: Import the CSV File

Step 2: Map the CSV file columns with LeadSquared Lead Fields. If a field in your CSV file doesn't exist in your LeadSquared account, click Create New Field and define the field properties.

The screenshot shows the 'Import Lead Steps' interface. It features a table for mapping CSV columns to LeadSquared fields. The first row is 'Last Activity Date' with a 'Select' dropdown. The second row is 'Last Name' with a 'Select' dropdown and a 'Create New Field' button. A tooltip above the 'Create New Field' button reads: 'Create a new field if you don't have a corresponding field for this CSV column in your account'. An 'Add Custom Field' modal is open, showing fields for 'Display Name' (set to 'Last Name'), 'Select Data type' (set to 'Text'), 'Show as' (set to 'Textbox'), and 'Maximum Length' (set to '50'). At the bottom of the modal are links for 'Advanced Settings', and buttons for 'Save and add new' and 'Save'.

Step 3: Define how to handle the duplicate leads in the CSV file. If a CSV file contains a lead with an email address that already exists in your LeadSquared account, the lead is a duplicate.

Pre- Requisite: Do maintain the column names in the CSV files before importing.

Step3: Advanced Settings:

Handling of duplicated while importing CSV file:

Ignore duplicates

If you select this option, duplicate records will **not** be imported. This is the default option that is pre-selected.

Overwrite duplicates

If you select this option, the CSV file data will overwrite the data in your LeadSquared account. The following checkboxes will also be available for selection

- Import only if valid email exists in CSV

- Do not update owner of existing leads

- Do not create new leads – this will ensure leads are only updated and no new leads are created.

Update empty fields of duplicates

With this option, only empty fields of the duplicate records in LeadSquared will be

updated with the data in the CSV file.

Uncheck the **Import only if valid email id exists in CSV** if you want to import leads with invalid email addresses as well.

Select List and Owner

- By default, the logged in user is displayed as the lead owner. You can change the lead owner from the drop-down.
- You can assign the leads to a list you've created, or you can create a new list. If you want to create a new list, enter the list name and a description.

Note: When you create a new list, it gets created as a **Static List**.

Data Formats

- You may encounter some of the following situations – When your CSV files contain date fields, example 'Contacted On', 'Followed Up On', 'Birthday', and so on, you should ensure that you've created a matching custom field in your LeadSquared account.
- If your CSV file contains a field which can be represented through a drop-down, you could create a matching custom field to map it to during the import process.
- If the CSV file contains a lead field of type 'Boolean', you can create a matching custom field and then map the information during the import process. If the field is empty then, by default it is mapped as 'NO' in LeadSquared.
 - For example, you may create a lead field for 'Valid Passport'. If a lead in your CSV file has an empty value for this column, it will get mapped as a 'No' in your LeadSquared account.
- If your CSV file contains a field for 'Do Not Email' you can map it to the 'Do Not Email' field in your account.



Please Complete Exercises

Open the Step-by-Step Exercise document from
https://myleadssquared.sharepoint.com/:b:/s/LeadSquared_Training/ESFd3Du3TttDvjCX_j4LqVcBU39Cvh7N70oUDTS5bpXuGg?e=AyMTd5
and complete till chapter 7

x

