



# Product Updates Webinar – June 25



# Welcome to the Latest at LeadSquared

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## **Technical Difficulties?**

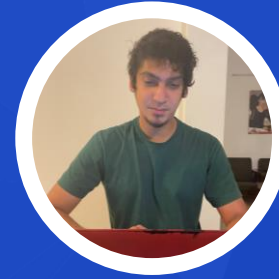
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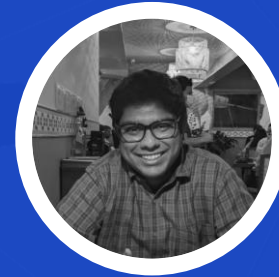


# Speakers & Support



**Vir Singh**

Product Documentation Manager



**Sri Sudhan**

Lead Technical Writer



**Digvijay Patel**

Product Support Team Lead

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New Web Experience

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Save Forms as Drafts

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My Teams



# Poll Question – 1

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# New Web Experience

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# Why We Reimagined the Experience

## We listened to your feedback.

- Clunky, outdated UI
- Too many clicks to get simple tasks done
- Difficult to navigate
- Slow and chaotic experience
- Not optimized for productivity

### Top User Pain Points: Navigation, Inconsistent UI & Bad UX

 **Narmada .S**  
Simandhar Education

"Not easy to Navigate."

 **user5@cpj.edu.in**  
CPJ Collage

"Very bad experience as well as lengthy process"

 **Ummed Saini**  
Analytics Vidhya

"Interface looks complicated. worst experience "

 **Nidhi Shree**  
SkilloVilla

ntly. Difficult to navigate."

"I did not like User Interface. Hard to look at letters..It is too big"

 **Mrigendra Singh**  
Imarticus

"It's cumbersome. Reps spend half their time clicking through menus to accomplish goals. And it breaks often"

 **Avantika**  
Law Sikho

"Very difficult dull interface, no"

 **Dipanshu Malviya**  
Top Rankers

"very boring interface"

 **Avantika**  
Law Sikho

"Very chaotic, time taking slow interface"

 **Rohith .I**  
Premier Consulting

"User interface is not comfortable"

# Meet the New Web Experience

**Our Fastest Version Yet:** The new experience delivers a **35%+ performance boost**, it's the fastest LeadSquared experience ever.

*"A Day in the Life of a Sales Rep – Reimagined"*.

## The journey starts on Smart Views

- Smart Views on the left panel for quick access
- Option to switch to classic top-tab view
- Add new views easily, collapse menu for more space

The screenshot displays the LeadSquared 'My Auto Loans' Smart View. On the left, a 'Smart Views' sidebar lists 'My New Leads' (39), 'My Home Loan' (3), 'My Auto Loans' (20), 'All Tasks' (15), and 'Pending Document...' (33). The main panel shows a table of automobile loans with columns for Opportunity Name, Actions, Status, Associated To, Stage, and Expect. The table lists seven entries, all with a status of 'Open' and a stage of 'Prospecting'. At the bottom, it indicates 'Showing 1-20 of 20' and 'Show 25'.

Opportunity Name	Actions	Status	Associated To	Stage	Expect
Kenneth - Automobile Loan	[Edit] [Share] [Print] [More]	Open	Kenneth	Prospecting	
Margaret - Automobile Loan	[Edit] [Share] [Print] [More]	Open	Margaret	Prospecting	
Larry Summer - Automobile Loan	[Edit] [Share] [Print] [More]	Open	Larry Summer	Prospecting	
Sam - Automobile Loan	[Edit] [Share] [Print] [More]	Open	Sam	Prospecting	
Aleesha - Automobile Loan	[Edit] [Share] [Print] [More]	Open	Aleesha	Prospecting	
Aleesha - Automobile Loan	[Edit] [Share] [Print] [More]	Open	Aleesha	Prospecting	
Jamie - Automobile Loan	[Edit] [Share] [Print] [More]	Open	Jamie	Prospecting	



# Let's Walk Through the New Journey

leadsquared

Lead Management

Smart Views

Leads

Opportunities

Activities

Tasks

Smart Views

My New Leads

My Home Loan

My Auto Loans

All Tasks

Pending Document...

My New Leads

Quick Add Lead

Add New Lead

Search here

+ Filter

Lead Name	Actions	Leads Score	Leads Stage	Lead Owner	Modified On
☆ Anna Smith	<div></div>	0	Interest	John	09/02/24   04:31 PM
☆ Sam Wise	<div></div>	0	Interest	Srisudhan	07/16/24   03:42 PM
☆ Jamie	<div></div>	5	Interest	Donatello	06/04/24   03:33 PM
☆ Emma	<div></div>	0	Interest	John	06/04/24   03:33 PM
☆ Jane	<div></div>	0	Customer	Joseph Chacko	05/24/24   02:41 PM
☆ Jean	<div></div>	0	Customer	Joseph Chacko	01/25/24   01:41 PM
☆ Zaid	<div></div>	0	Customer	Joseph Chacko	01/25/24   01:15 PM

Showing 1-25 of 39

Show 25

12

Converse

# Customize Your Workspace

## Make It Yours

- Pin important columns
- Reorder with drag-and-drop
- Smooth filtering with reusable filters

The screenshot displays the 'My New Leads' workspace in LeadSquared. At the top, there's a header with a user icon, the title 'My New Leads', and buttons for 'Quick Add Lead' and 'Add New Lead'. Below the header is a search bar and filter controls. A table of leads is visible, with columns for Lead Name, Leads Score, Lead Owner, and Modified On. A 'Filter' dropdown menu is open, showing 'Pinned filters 2/10' (Leads Stage, Country) and 'Other Filters' (Leads Source, Lead Owner, Last Activity Date). A 'Manage Columns' dialog is also open, allowing users to 'Select Lead Columns' (Address 1, Address 2, Age, Children, City, Company, Conversion Referrer URL, Country, Course) and 'Reorder Selected Columns' (Lead Name, Actions, Leads Stage, Leads Score, Lead Owner, Modified On, Do Not Call). The dialog includes 'Restore Default' and 'Update' buttons.

# Tailor Your View in Seconds

leadsquared

Lead Management

Smart Views

Leads

Opportunities

Activities

Tasks

Smart Views

My New Leads

My Home Loan

My Auto Loans

All Tasks

Pending Document...

My New Leads

Quick Add Lead

Add New Lead

Search here

Filter

Lead Name	Actions	Leads Stage	Leads Score	Lead Owner	Modified On
☆ Zaid		Customer	0	Joseph Chacko	06/19/25   05:52 PM
☆ Jane		Customer	0	Joseph Chacko	06/19/25   05:52 PM
☆ Sam Wise		Interest	5	Srisudhan	06/19/25   05:52 PM
☆ Emma		Interest	0	John	06/19/25   05:51 PM
☆ Anna Smith		Interest	0	John	06/19/25   05:50 PM
☆ Jean		Customer	0	Joseph Chacko	06/19/25   05:50 PM
☆ Jamie		Interest	5	Donatello	06/19/25   05:50 PM

Showing 1-25 of 39

Show 25

1 2

Converse

# Quick View – Instant Context, One Click

## No More Page-Hopping

- View lead/task details instantly
- Add notes, make calls, send emails
- Fully customizable to show what matters most

The screenshot displays the LeadSquared CRM interface. The main section, titled "My Home Loans", features a search bar, a filter button, and a table of loan opportunities. The table has columns for Opportunity Name, Actions, Status, and Associated To. The "Whit Stillman - Home Loan" entry is highlighted. To the right, a "Quick View" panel for this specific loan is open, showing details like Product, Opportunity Age, Expected Deal Size, and Expected Closure Date.

Opportunity Name	Actions	Status	Associated To
Jean	[Edit] [Refresh] [Print] [More]	Open	Jean
Whit Stillman - Home Loan	[Edit] [Refresh] [Print] [More]	Won	Whit Stillman
Vir Singh - Home Loan	[Edit] [Refresh] [Print] [More]	Won	Vir Singh

Showing 1-3 of 3 | Show 25 | 1

**Whit Stillman - Home Loan**

Whit Stillman

**Opportunity Properties**

- Product: 01-MA Psychology Online Course
- Opportunity Age: 1142 Days
- Expected Deal Size: 138000
- Expected Closure Date: 07/11/25 | 05:00:00 PM

# Everything You Need, One Click Away

leadsquared

Lead Management

Smart Views

Leads

Opportunities

Activities

Tasks

Smart Views

My New Leads

My Home Loan

My Auto Loans

All Tasks

Pending Document...

My New Leads

Quick Add Lead

Add New Lead

Search here

+ Filter

Leads Stage

Country

Lead Name	Actions	Leads Stage	Leads Score	Lead Owner	Modified On	Do Not
☆ Sam Wise		Interest	5	Srisudhan	06/19/25   07:05 PM	No
☆ Zaid		Customer	0	Joseph Chacko	06/19/25   05:52 PM	Yes
☆ Jane		Customer	0	Joseph Chacko	06/19/25   05:52 PM	Yes
☆ Emma		Interest	0	John	06/19/25   05:51 PM	No
☆ Anna Smith		Interest	0	John	06/19/25   05:50 PM	No
☆ Jean		Customer	0	Joseph Chacko	06/19/25   05:50 PM	No
☆ Jamie		Interest	5	Donatello	06/19/25   05:50 PM	No

Showing 1-25 of 39

Show 25

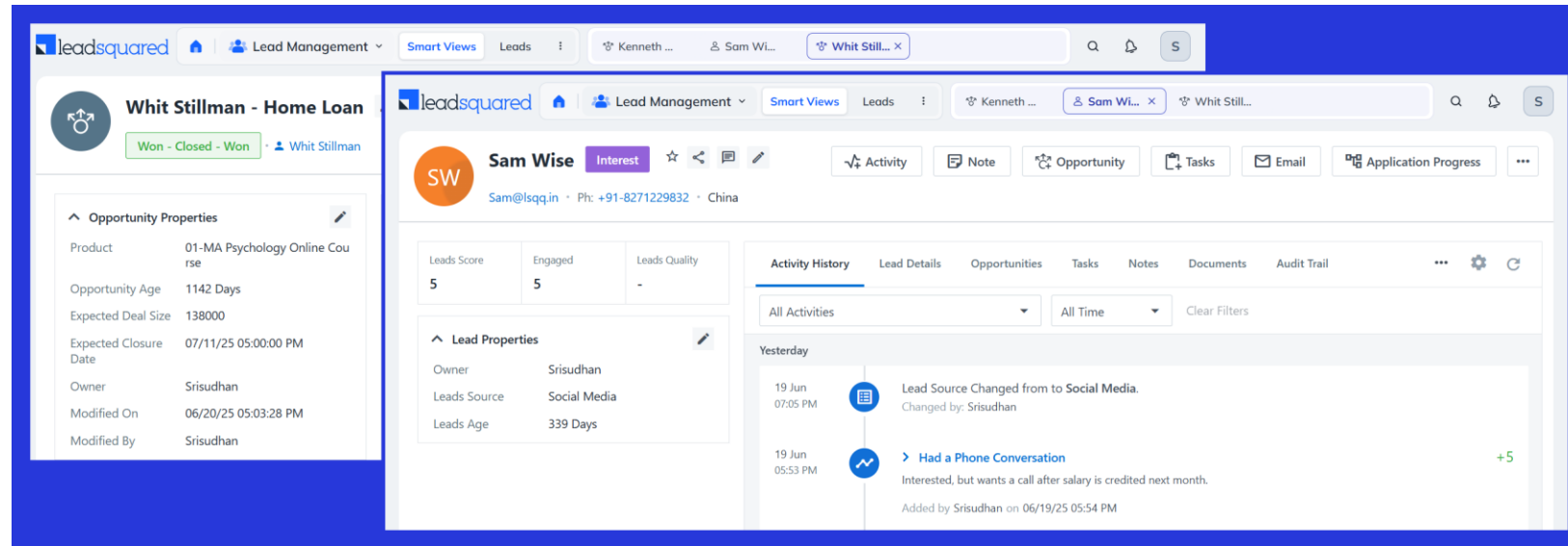
1 2

Converse

# App Tabs – Multitasking Made Easy

## Work Like a Pro

- Open multiple leads/opportunities in tabs
- Switch seamlessly without losing context
- Perfect for call-heavy workflows



# No More Tab Chaos

leadsquared

Lead Management

Smart Views

Leads

Opportunities

Activities

Tasks

Smart Views

My New Leads

My Home Loan

My Auto Loans

All Tasks

Pending Document...

My New Leads

Quick Add Lead

Add New Lead

Search here

+ Filter

Leads Stage

Country

Lead Name	Actions	Leads Stage	Leads Score	Lead Owner	Modified On	Do Not
☆ Sam Wise	<div></div>	Interest	5	Srisudhan	06/19/25   07:05 PM	No
☆ Zaid	<div></div>	Customer	0	Joseph Chacko	06/19/25   05:52 PM	Yes
☆ Jane	<div></div>	Customer	0	Joseph Chacko	06/19/25   05:52 PM	Yes
☆ Emma	<div></div>	Interest	0	John	06/19/25   05:51 PM	No
☆ Anna Smith	<div></div>	Interest	0	John	06/19/25   05:50 PM	No
☆ Jean	<div></div>	Customer	0	Joseph Chacko	06/19/25   05:50 PM	No
☆ Jamie	<div></div>	Interest	5	Donatello	06/19/25   05:50 PM	No

Showing 1-25 of 39

Show 25

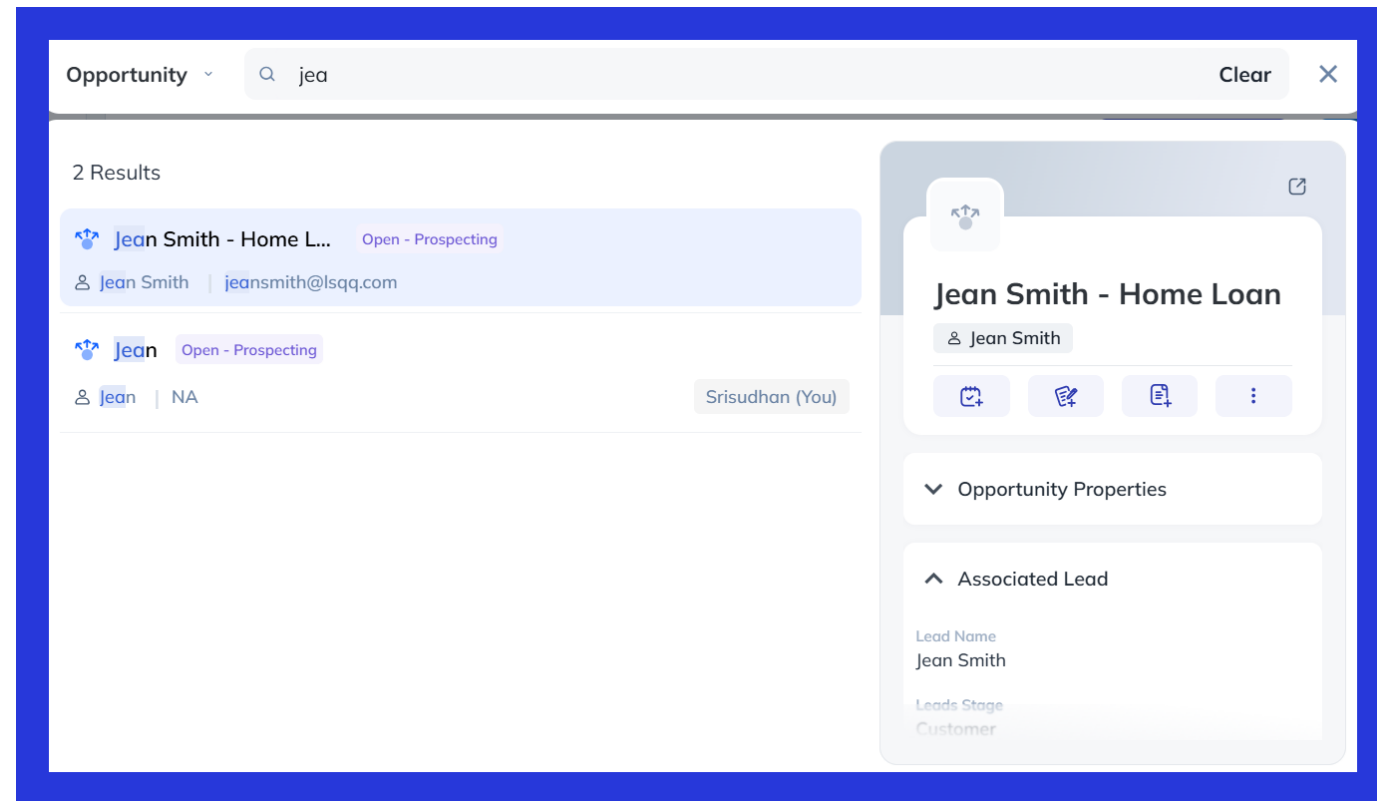
1 2

Converse

# Global Search – Find Anything, Fast

## Search That Works Like Magic

- Search across leads, opportunities, and more
- View details and take actions instantly
- Save recent searches





# Smart Search for Smarter Selling

leadsquared

Lead Management

Smart Views

Leads

Whit Still...

Sam Wi...

S

Smart Views

My New Leads39

My Home Loan3

My Auto Loans20

All Tasks15

Pending Document...33

My Auto Loans

Search here

+ Filter

Add New Lead

Add Automobile L...

Opportunity Name	Actions	Status	Associated To	Stage	Expected
<input type="checkbox"/> Kenneth - Automobile Loan		Open	Kenneth	Prospecting	
<input type="checkbox"/> Margaret - Automobile Loan		Open	Margaret	Prospecting	
<input type="checkbox"/> Larry Summer - Automobile Loan		Open	Larry Summer	Prospecting	
<input type="checkbox"/> Sam - Automobile Loan		Open	Sam	Prospecting	
<input type="checkbox"/> Aleesha - Automobile Loan		Open	Aleesha	Prospecting	
<input type="checkbox"/> Aleesha - Automobile Loan		Open	Aleesha	Prospecting	
<input type="checkbox"/> Jamie - Automobile Loan		Open	Jamie	Prospecting	

Showing 1-20 of 20

Show 25

1

# Activities & Opportunity Pages + Navigation

## Even the Small Things Got Better

- All activity/opportunity types visible at a glance
- Pin frequently used ones
- New navigation: cleaner, faster, admin-configurable

The screenshot displays the LeadSquared interface. On the left, the 'Activity Types' sidebar shows 'Documents' pinned. The main content area is titled 'Documents' and features a search bar and a '+ Filter' button. Below this is a table with the following columns: 'Associated To', 'Actions', 'Notes', 'Activity Date', 'Owner', and 'Status'. The table contains several rows of document entries, including 'Jamie - Automobile Loan', 'Sam - Home Loan', and 'Jamie - Home Loan'. The 'Status' column for the 'Jamie - Home Loan' entry is marked as 'Active'. At the bottom of the table, it indicates 'Showing 1-25 of 33' and provides a 'Show 25' dropdown menu.

# Cleaner, Simpler, Smarter

leadsquared

Lead Management

Smart Views

Leads

Opportunities

Activities

Tasks

Smart Views

My New Leads

My Home Loan

My Auto Loans

All Tasks

Pending Document...

My Auto Loans

Add New Lead

Add Automobile L...

Search here

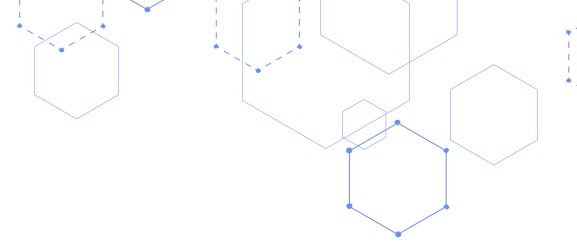
+ Filter

Opportunity Name	Actions	Status	Associated To	Stage	Expected
<input type="checkbox"/> Kenneth - Automobile Loan		Open	Kenneth	Prospecting	
<input type="checkbox"/> Margaret - Automobile Loan		Open	Margaret	Prospecting	
<input type="checkbox"/> Larry Summer - Automobile Loan		Open	Larry Summer	Prospecting	
<input type="checkbox"/> Sam - Automobile Loan		Open	Sam	Prospecting	
<input type="checkbox"/> Aleesha - Automobile Loan		Open	Aleesha	Prospecting	
<input type="checkbox"/> Aleesha - Automobile Loan		Open	Aleesha	Prospecting	
<input type="checkbox"/> Jamie - Automobile Loan		Open	Jamie	Prospecting	

Showing 1-20 of 20

Show 25

1



## **Ready to experience the difference?**

Try using Quick View for a day – see how much time you save.

<http://app.leadSquared.com/>



# Smarter Conversations with the AI Knowledge Base Bot

## Deliver Instant, Intelligent Answers



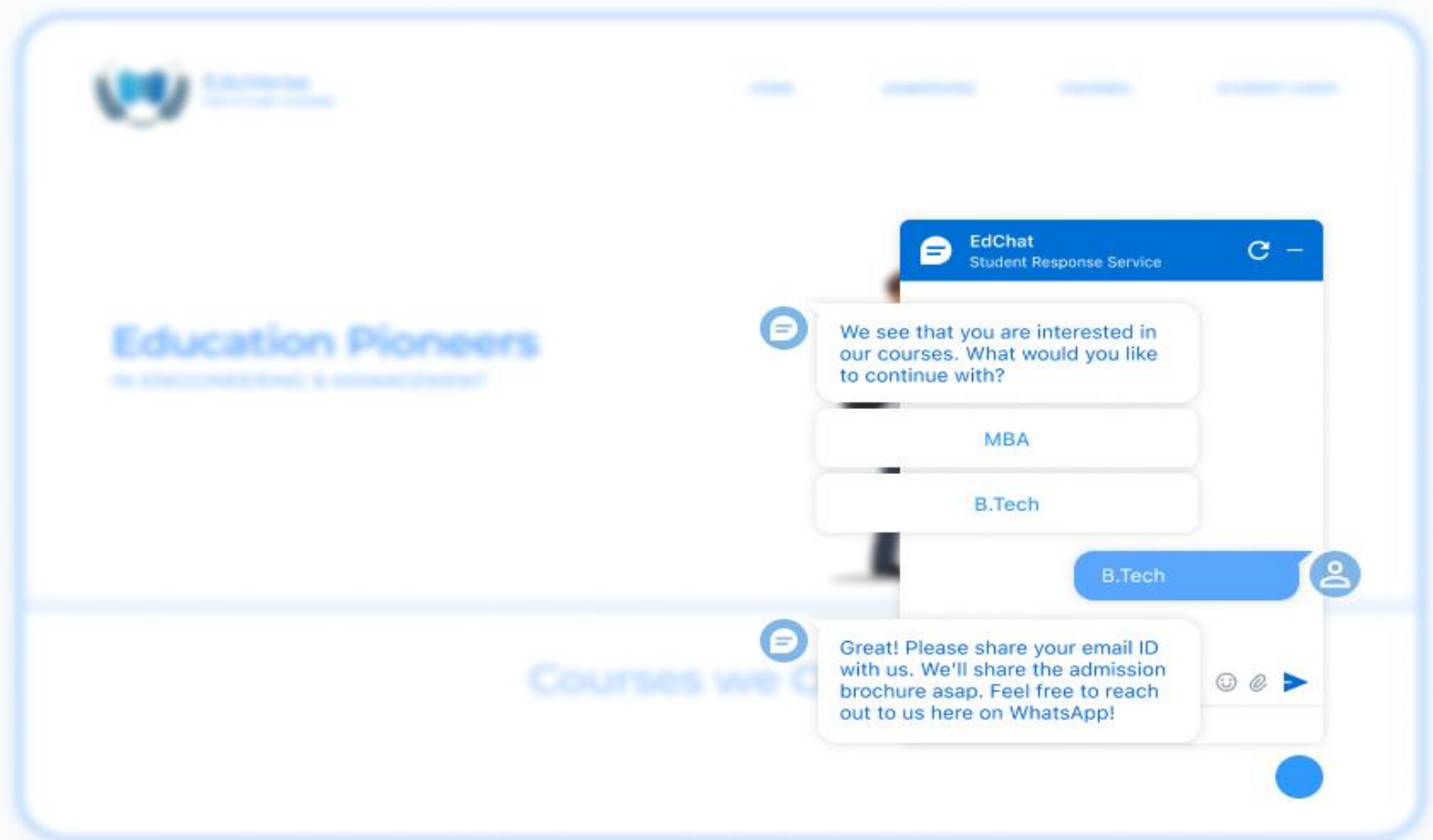
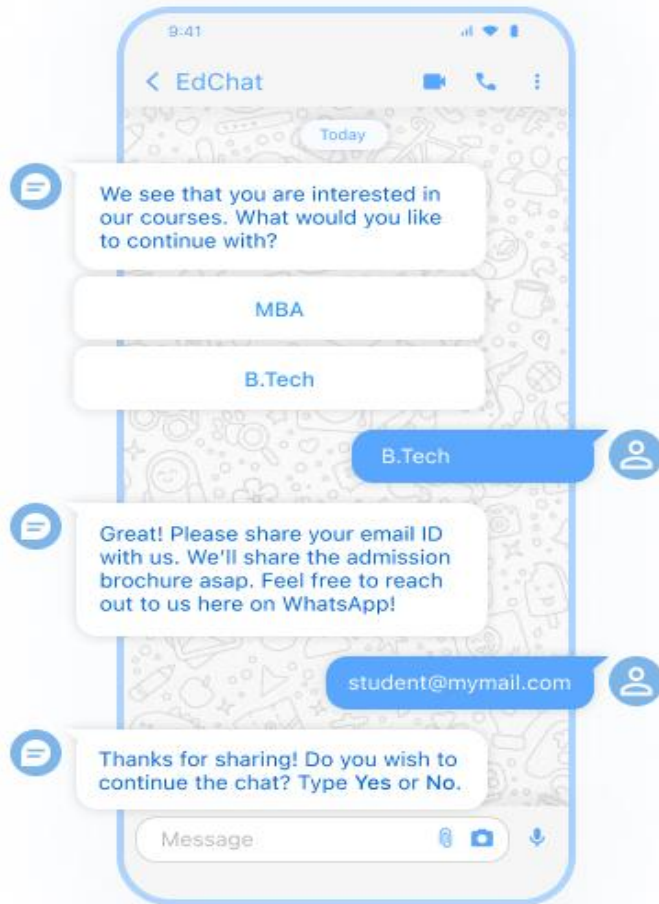
# Poll Question – 2

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# Build Bots That Work for You – No Code Needed

- LeadSquared's Chatbot is a powerful, no-code, menu-driven builder that helps you create intelligent chat flows to:
  - Resolve lead queries instantly
  - Reduce agent workload
  - Engage users round the clock
- Three Powerful Bot Types:
  - 🗺️ Journey-Based Bot
  - 💬 AI Help Bot
  - 🧠 AI Knowledge Base Bot

# Build Bots That Work for You – No Code Needed





# Smarter Conversations, Powered by the AI KB Bot



- Journey bots are excellent for structured flows like lead capture or onboarding.
- But when customers ask open-ended or unexpected questions, these bots may not have the answers.
- This often leads to fallback triggers and repetitive escalations to human agents.
- The AI Knowledge Bot complements-not replaces-journey bots by handling these edge cases intelligently.

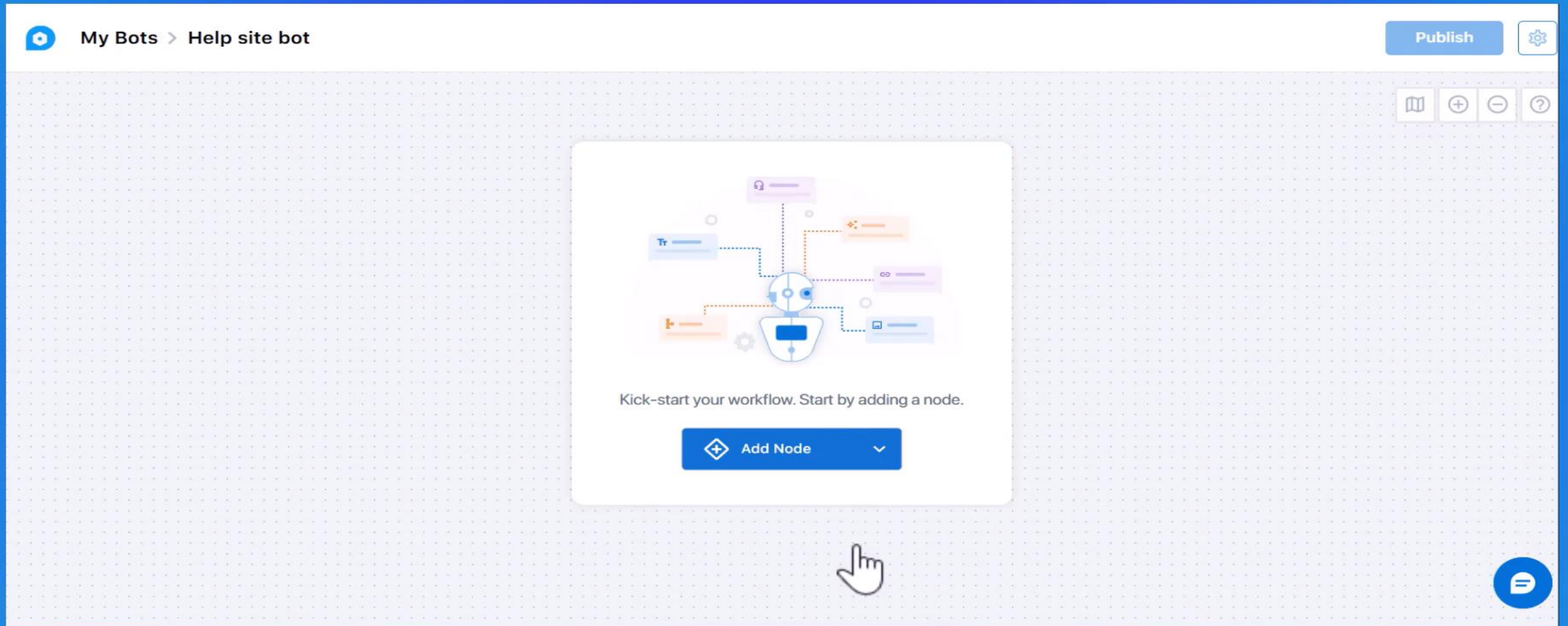
# Smarter Conversations, Powered by the AI KB Bot

The screenshot displays the Chatbot Bot Builder interface. On the left is a sidebar with a list of components: Text, Image, Video, Document, Interactive, Condition Node, API, LSQ APIs, Go To Node, Trigger BOT, Template Message, Handover Node, Templated Flow, and Configurations. The main workspace is a grid where a flowchart is being built. It includes tabs for 'Home' and 'Lead Capture'. A node titled 'Welcome' is visible, with details: 'Type: Templated Flow' and 'Intent: Hi'. At the bottom of the grid are zoom and refresh icons. On the right, a chat preview window for 'Test\_v2' is shown, featuring a 'View Logs' toggle, a text input field with the placeholder 'Type here', and a send button.

# What Is the AI Knowledge Base Bot?

- An independent AI-powered bot that can also work alongside journey-based bots
- Learns from documents and URLs you provide
- Resolves queries outside the structured chat flow
- Unlike the AI Help Bot, this bot trains itself using your content
- Built using AWS Bedrock:
  - Embedding model: Cohere-english-v3
  - Generation model: Amazon Nova Lite

# What Is the AI Knowledge Bot?




The screenshot displays the 'My Bots > Help site bot' interface. At the top right, there is a 'Publish' button and a settings icon. Below these are icons for a book, a plus sign, a minus sign, and a question mark. The main workspace is a grid with a central white box containing a diagram of a bot's workflow. The diagram shows a central robot head icon connected to several nodes: a purple node with a headset icon, an orange node with a key icon, a purple node with a link icon, a blue node with a document icon, and an orange node with a key icon. Below the diagram, the text reads 'Kick-start your workflow. Start by adding a node.' and there is a blue button labeled 'Add Node' with a plus icon and a dropdown arrow. A hand cursor is pointing at the 'Add Node' button. In the bottom right corner, there is a blue circular chat icon.


My Bots > Help site bot

Publish

ⓘ + - ?



Kick-start your workflow. Start by adding a node.

 Add Node



# Where Can You Use It?


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- Customer Support: FAQs, manuals, help docs
- Sales Enablement: Playbooks, case studies
- Education: Academic materials
- Healthcare: Patient FAQs
- BFSI: Loan Eligibility, Insurance FAQs

# Setting Up the AI KB Bot

- Build a journey bot
- Upload files or URLs to train the AI
- Enable AI toggle and add context
- Bot responds to fallback queries using trained content

# Setting Up the AI KB Bot



DASHBOARD

CONTENT

MARKETING


LEADS


WORKFLOW


APPS


REPORTS

ACE









Chatbot

Automate conversations and save agents time.


Welcome to Converse Bot


Chatbot

Create and publish your chatbot within minutes.

Get started.

Converse - Chat





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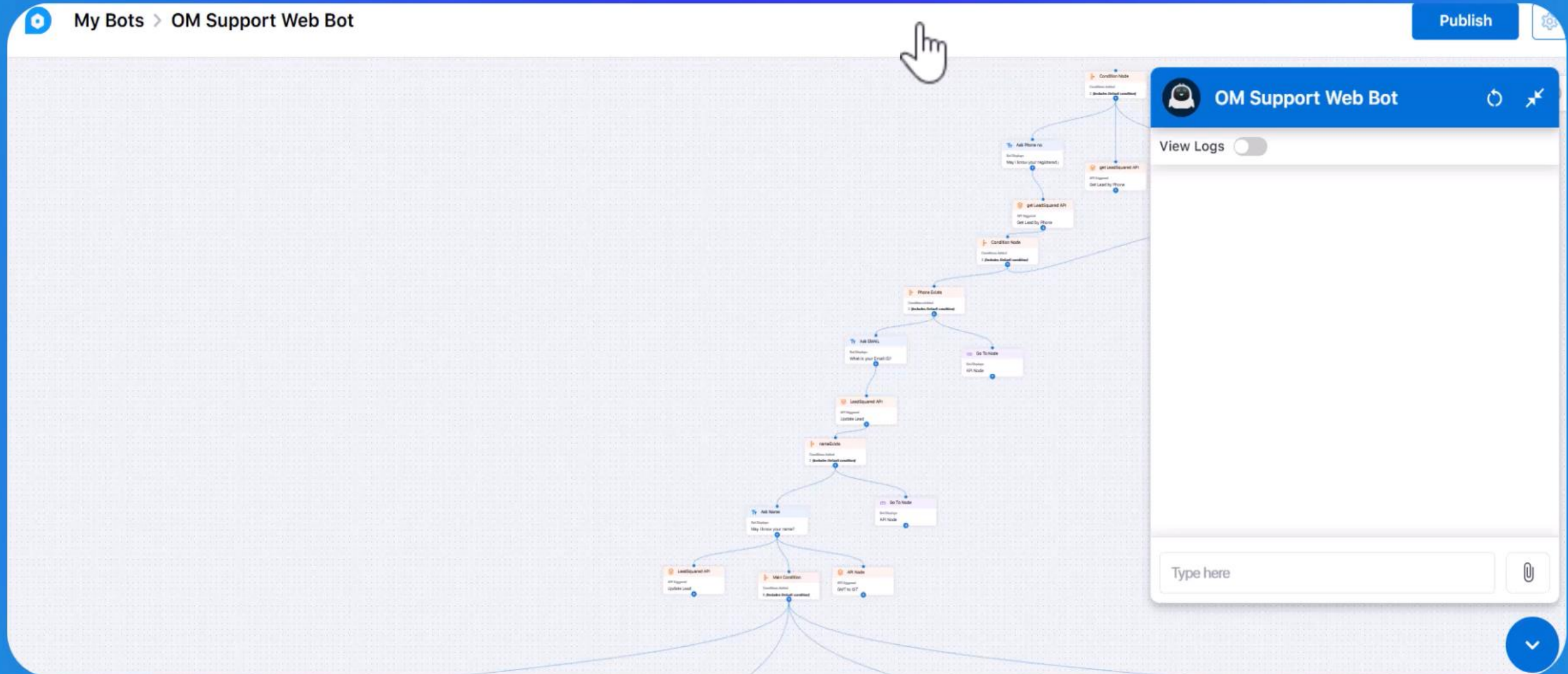


# Make the AI KB Bot Work for You

- Journey bot captures lead info
- AI bot answers “What’s the refund policy?” or “How do I pay?”
- Response pulled from KB or website



# Make the AI KB Bot Work for You



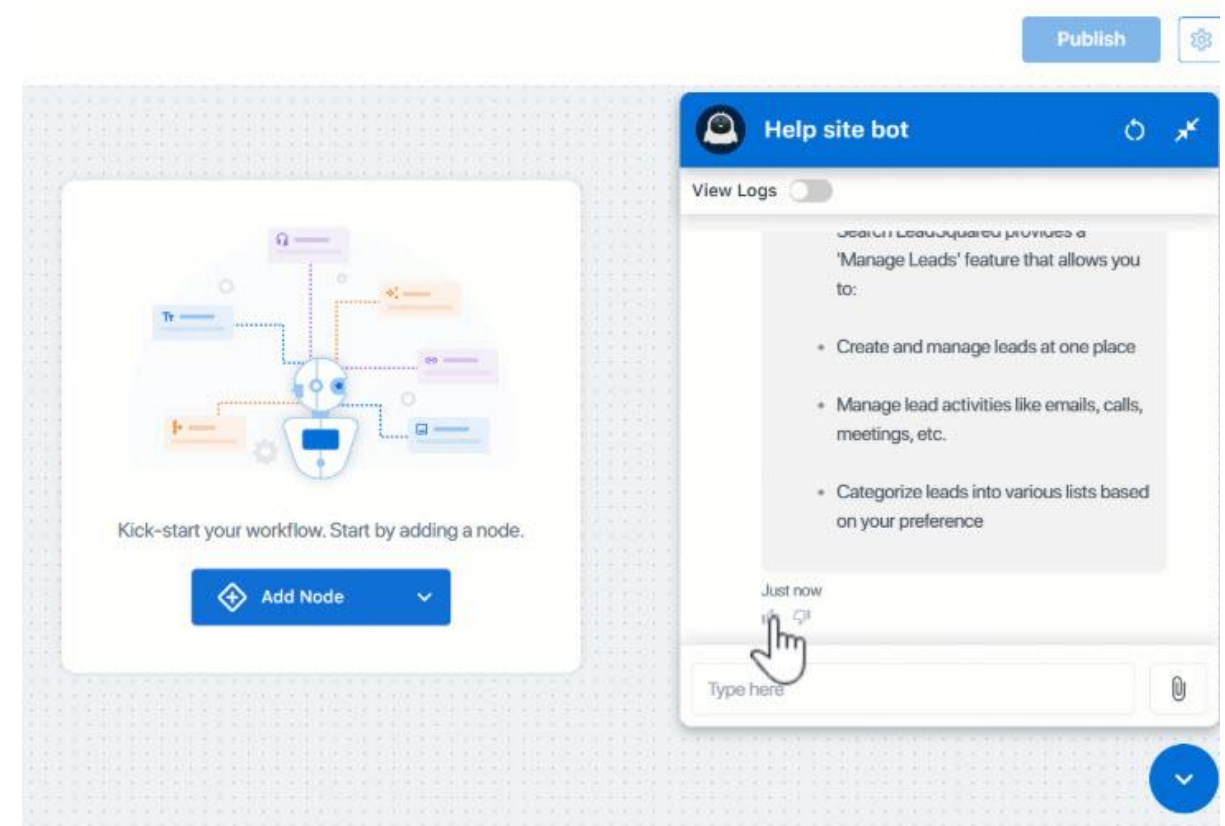
# Why it Matters



- Reduces agent load
- Improves customer experience
- Speeds up query resolution
- AI handles repetitive queries
- Agents focus on high-value tasks
- Customers get instant answers

# Points to Remember

- Avoid:
  - Poorly structured or outdated KB content
  - Contradictory information
  - Missing fallback configuration
- Always test with real queries before going live
- Always give feedback for the bot's response
- Contact your account manager right now to enable the AI KB Bot on your account.





# Casa – Single Page CRM

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# Why Casa?

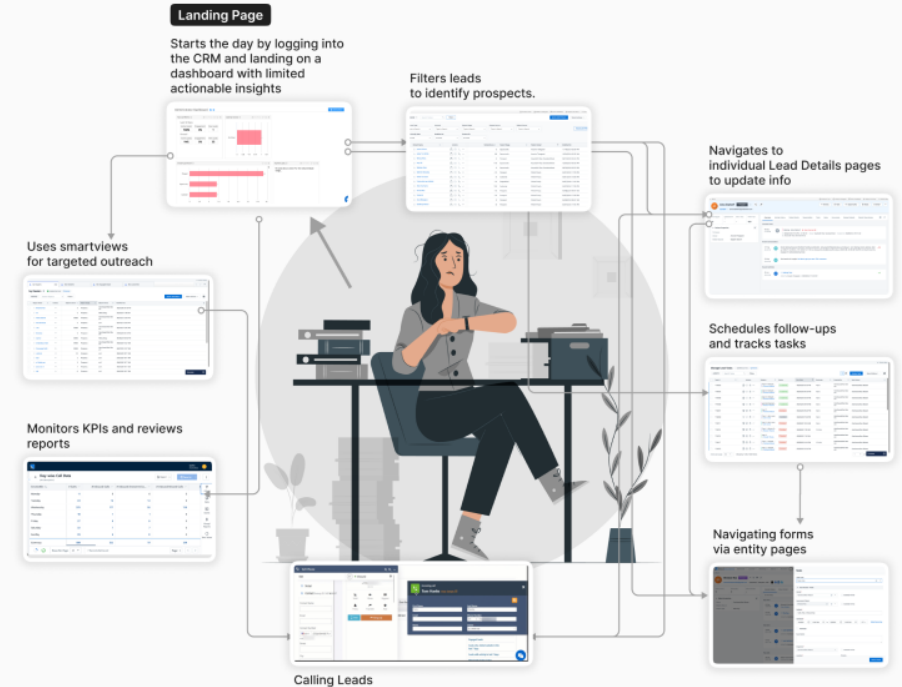
## From Page-Hopping to Productivity

- Navigates 10–15 pages daily, causing inefficiencies
- Multiple open tabs slow the system and create sync issues
- Frequent page switching disrupts focus and wastes time
- Limited actionable insights on login
- Fragmented workflows across modules

## Miss Jane's Journey in a Traditional CRM

A Multi-Page Experience

Miss Jane, a diligent sales representative, begins her day navigating to complete all her daily operations. Here is an overview of the journey she typically undertakes:



### Challenges

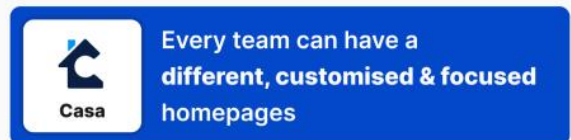
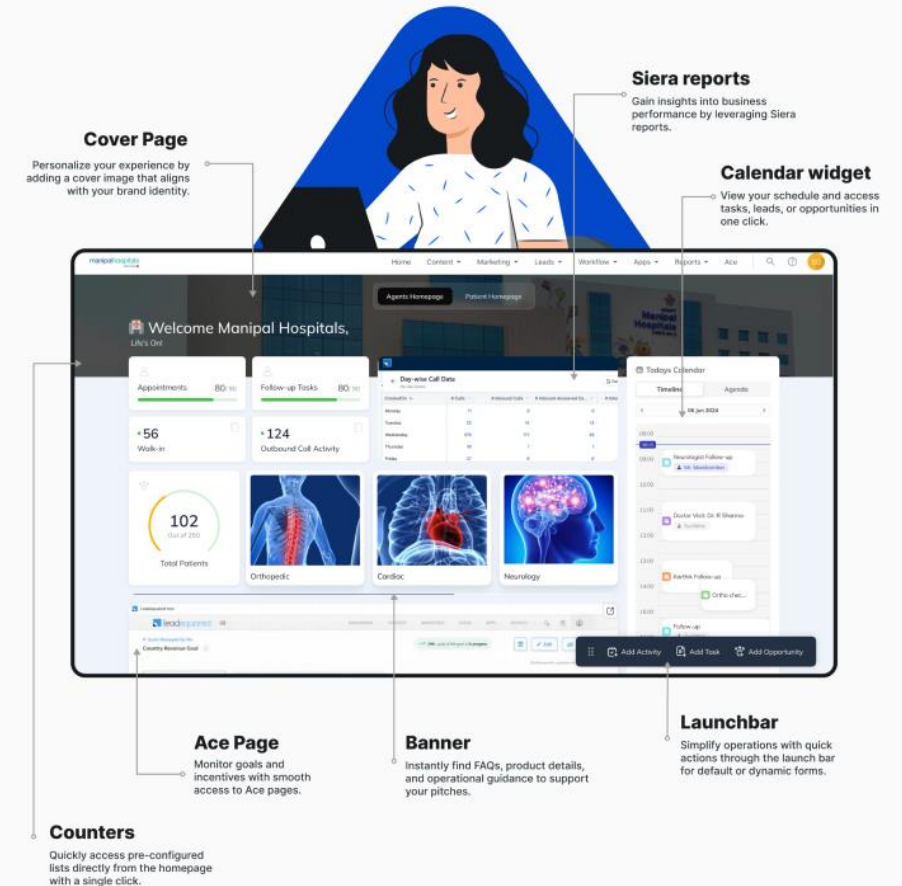
- Navigates **10-15 pages daily**, causing inefficiencies.
- **Multiple open tabs** slow the system and create data sync issues.
- **Frequent page switching** disrupts focus and wastes time.

# Casa – Your Single Page CRM

**Everything you need, right where you need it.**

- Personalized homepages for different teams
- View tasks, leads, reports, and more in one place
- One-click actions to jump into work
- Add branded cover images for identity
- Embed external tools and dashboards
- Quick-launch icons for high-use features

Miss Jane's Journey with



# A Day with Casa

## From Chaos to Clarity

- Start your day with a clear view of tasks and KPIs
- Take action directly from the homepage
- Stay on top of follow-ups and meetings
- Reduce missed tasks and improve accountability





# Welcome

Gear up for today, check up on KPIs and required follow-ups

To-Do Tasks

4/100

9

Appointments Pending

Follow-Ups completed

Timeline

Agenda

<

January 20, 2025

>

1 Appointments

<

>

20:00

20:31

Meeting :

21:00

9

Leads

4

Out of 100

CompletedThisMonth

Meeting

Timeline

Agenda

<

January 25, 2025

>

0 To-dos, 1 Appointments

08:30 PM

45 min

Meeting

...

4 /100

+

Appointments

Appointments pending

Timeline

Agenda

<

January 25, 2025

>

1 Appointments

<

>

20:00

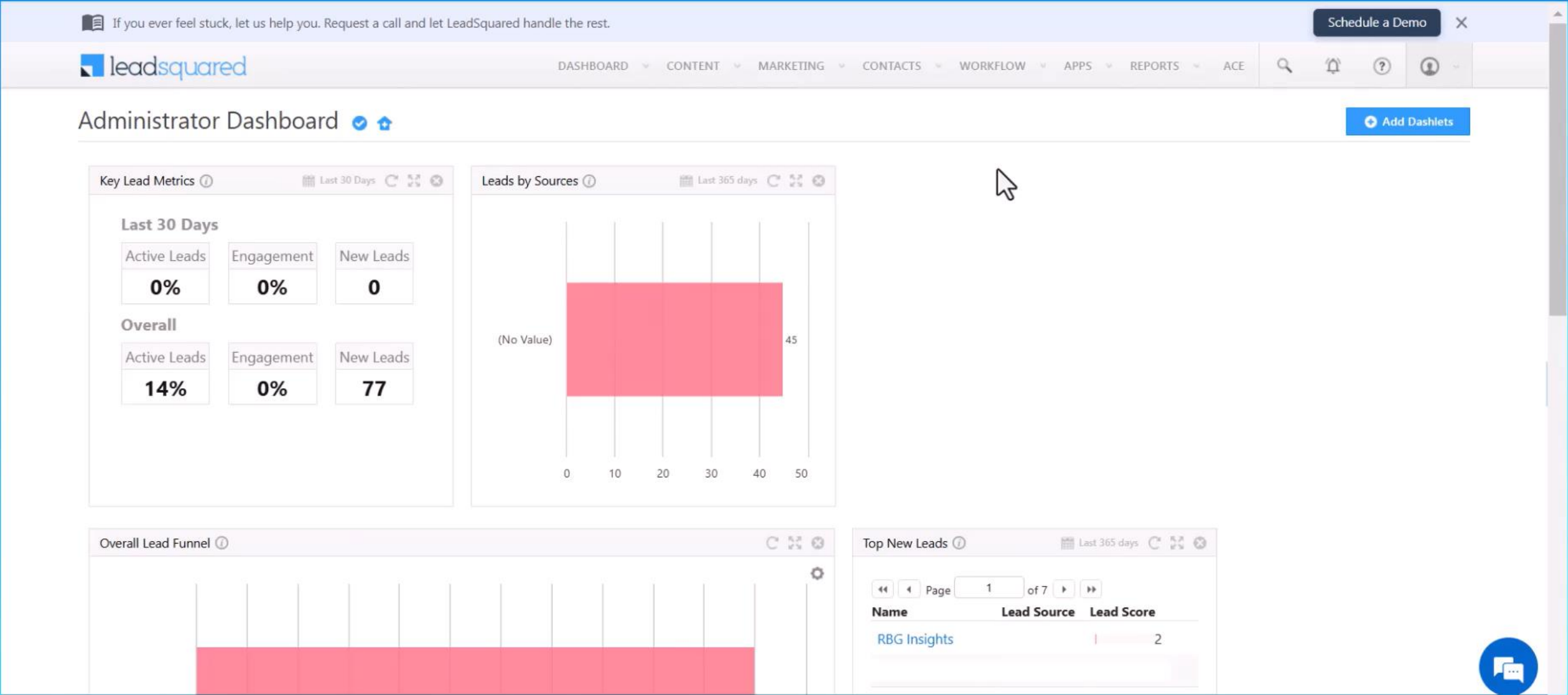
20:31

Meeting

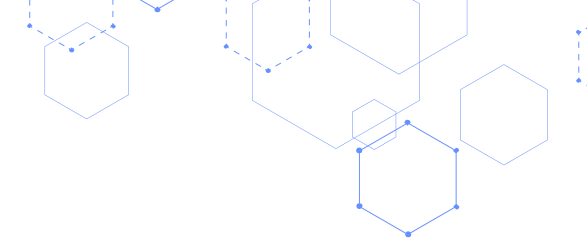
21:00



# Get Up and Running in Minutes



# Casa is



Task Completion Rate



Lead Drop-Offs



Calls Per Day



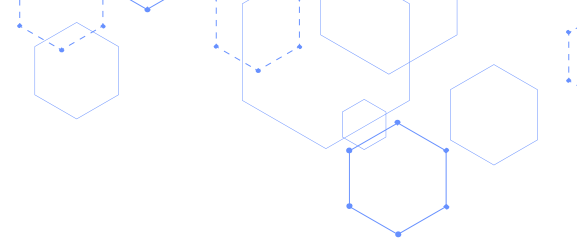
Revenue per Rep



Leads Conversion Rate



Average time for first action



**Ready to simplify your day?**

Try Casa for a week – see how much more you get done.



# Save Forms as Drafts

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# Save Forms as Drafts

## Start Now, Finish Later – Without Losing a Step

- Pause and resume long application forms—perfect for admissions, onboarding, and compliance.
- Field agents can save forms mid-way and complete them later, even in low-connectivity areas.
- Reduce frustration and improve completion rates for multi-step lead capture processes.

# Save Your Work, Stay in Flow

leadsquared

Lead Management

Smart Views

Accounts

Leads

Activities

Tasks

Activity Types

Q Search here

Pinned Activity Types 0

Other Activity Types 58

Acuity Scheduling

Approval

Bayut WhatsApp E...

Calendly

Changed Password...

Chat Conversation

Check Juspay paym...

ent

Approval

Q Search here

+ Filter

Add New Lead

Add Approval

Associated To	Actions	Notes	Activity Date	Owner	Status
<input type="checkbox"/> Adam Scott			03/06/25   03:34 PM	Phil	Pending
<input type="checkbox"/> Johnny Rose			03/06/25   03:32 PM	Phil	Pending
<input type="checkbox"/> Johnny Rose			03/06/25   03:27 PM	Phil	Pending
<input type="checkbox"/> Anna Sam			03/04/25   04:35 PM	Oshin A	Pending

Showing 1-4 of 4 Show 25

Converse



# Poll Question – 3

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# My Teams

## Unlock Real-time Field Visibility



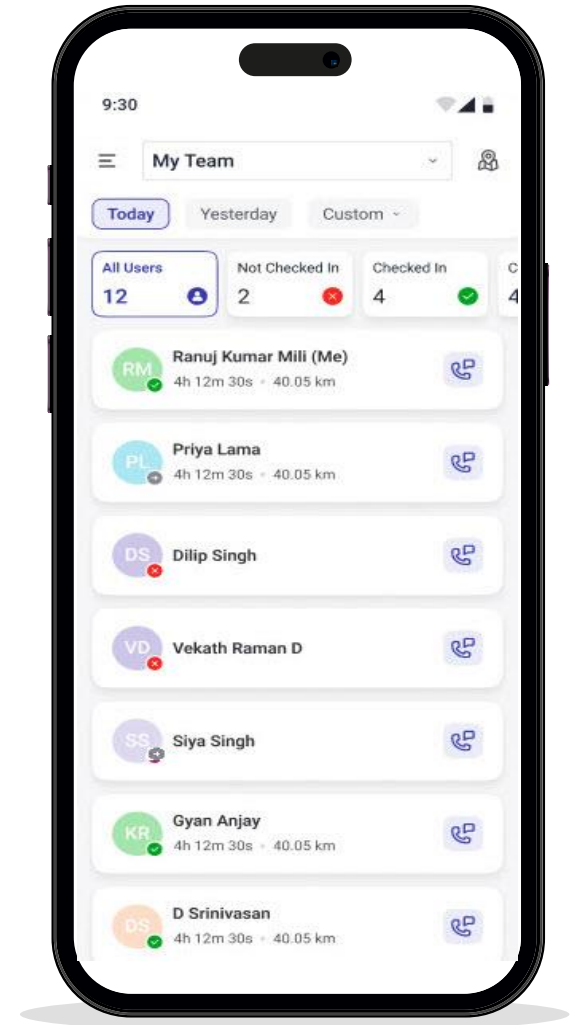


# Can Field Sales be Improved?

- Managers toggle between dashboards, reports, and SmartViews
- Building custom reports is time-consuming
- Fragmented insights delay decisions and coordination
- Web views don't offer optimal UX

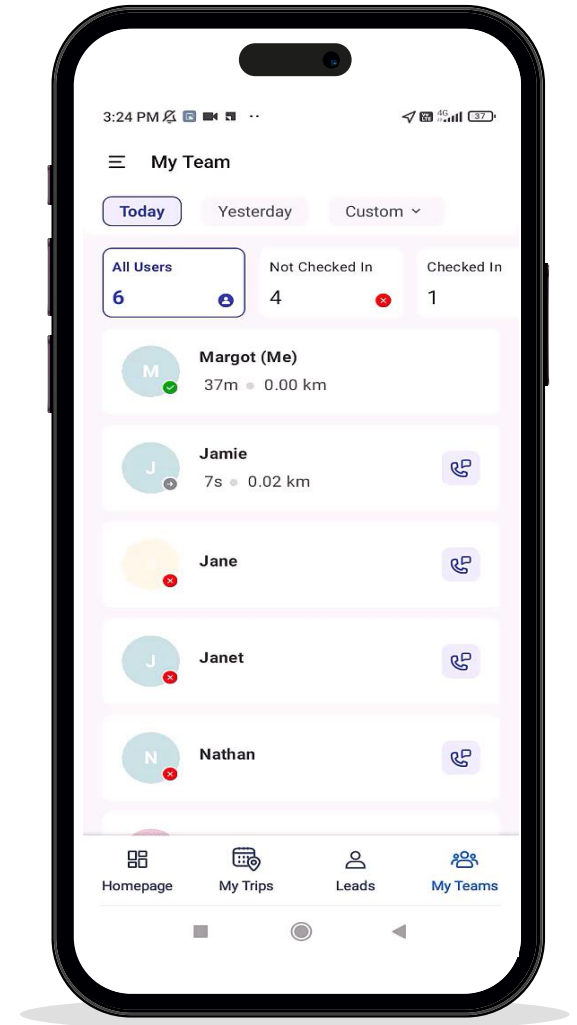
# Introducing My Teams

- Mobile-first feature for Sales Group Managers or Reporting Managers
- Real-time visibility into team status, location, and performance
- Designed for quick, actionable insights



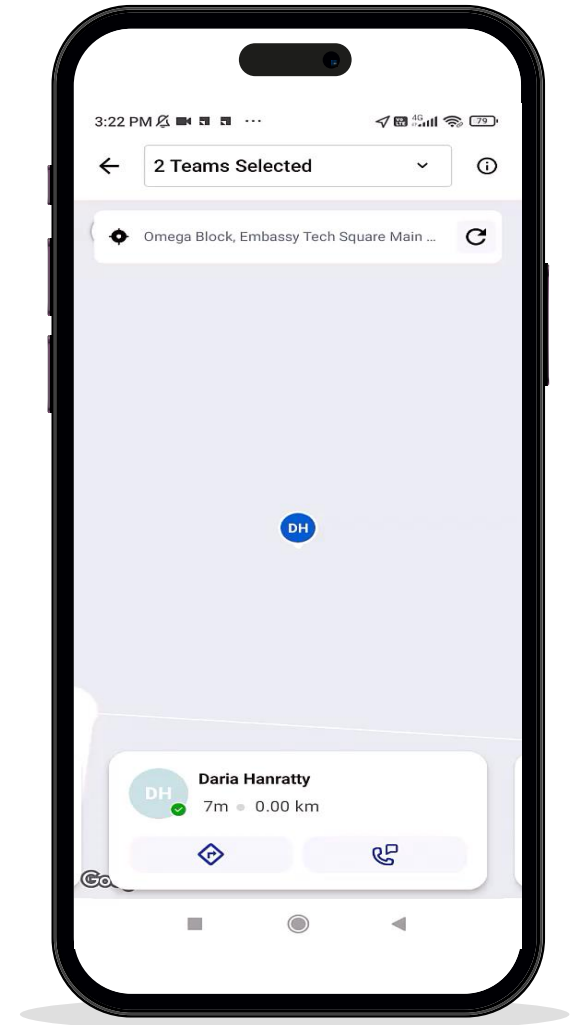
# What can My Teams do for You?

- Answers key questions:
  - Who's working?
  - Where are they?
  - What did they achieve?
- Track check-in/check-out status
- Locate sales reps on map for on-ground support
- Monitor leads, tasks, and activities
- Contact reps instantly via call/SMS/WhatsApp

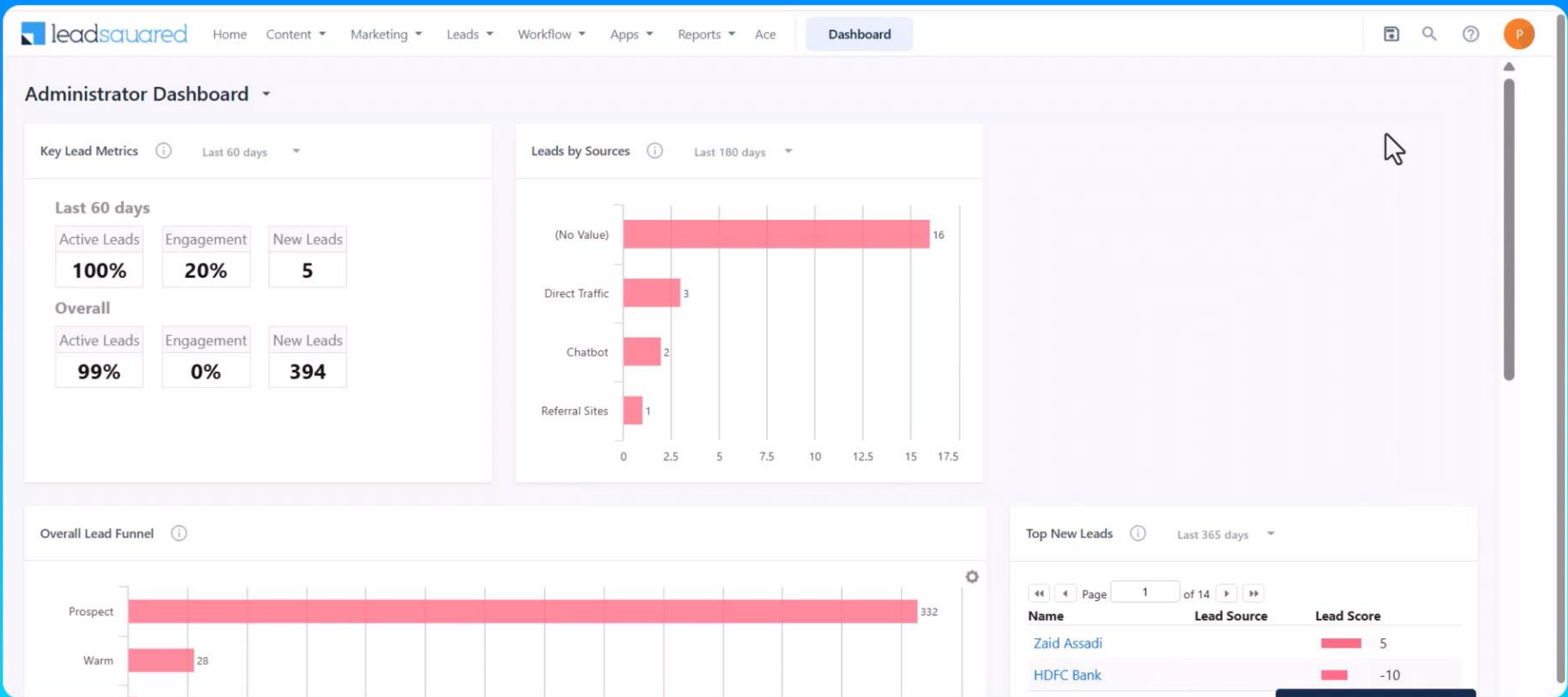


# Powerful Features for Managers

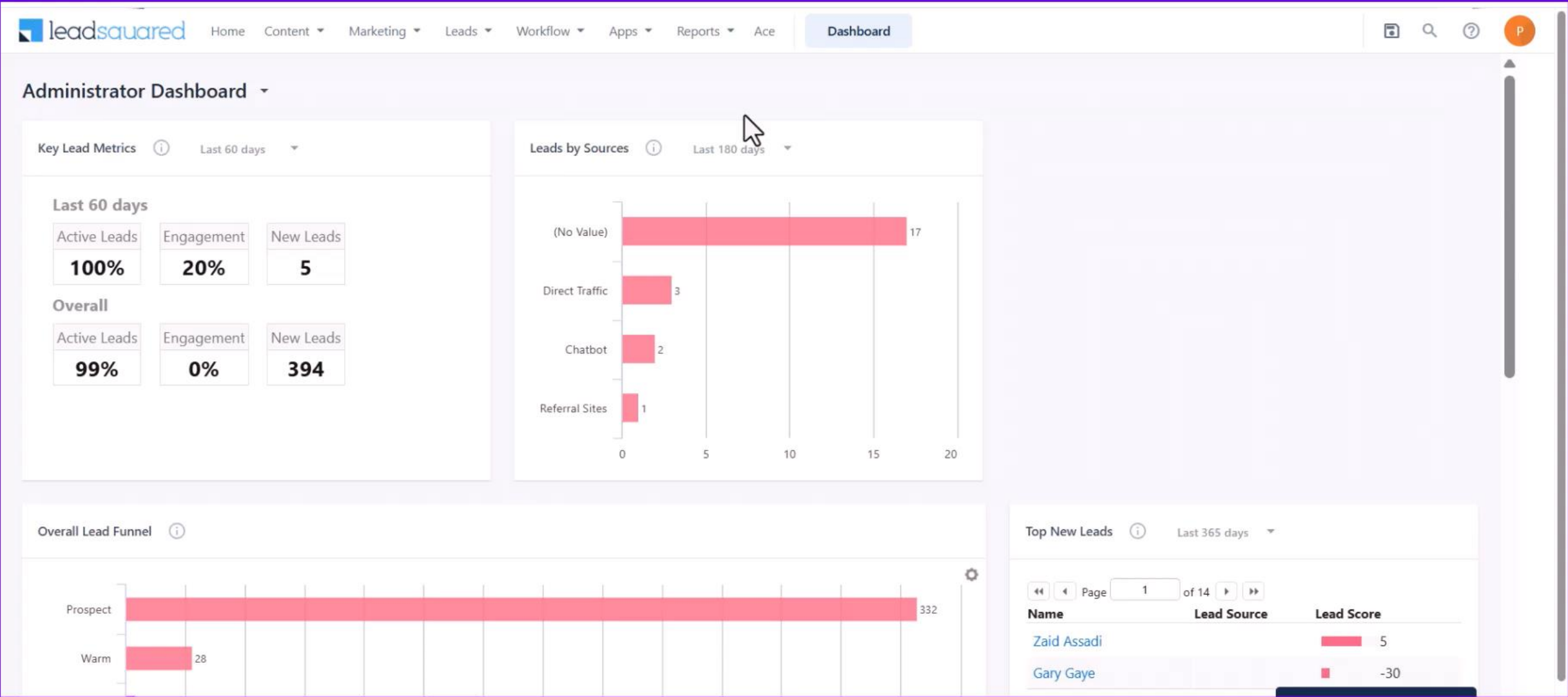
- User Cards to monitor:
  - Check-in Status
  - Duration
  - Distance Travelled
  - Contact Button
- Multi-group dropdown for switching views
- Map clustering for large teams



# Getting Started with My Teams



# Getting Started with My Teams – Using Casa



# Publish My Teams – Using Casa

The screenshot displays the leadsquared web interface. At the top, a navigation bar includes links for HOME, CONTENT, MARKETING, LEADS, WORKFLOW, APPS, REPORTS, and ACE. A search icon, a notification bell with a red '2', and a user profile icon are also present. The main content area is titled 'Bengaluru' and features a 'Publish' button. On the left, a sidebar contains various icons for navigation. The central focus is a mobile app preview for 'Casa'. The app's interface shows a status bar at 09:59, the 'Casa' logo, a user profile for 'Hi, Phil' (oshin.anand@lead...), and a grid of menu items: My Trips, Dashboard, Converse, My Teams, Leads, Smart Views, Near Me, and Activities. A green 'Check In' button is at the bottom of the app preview. To the right of the app preview, there are two panels: 'Visible Menu Tabs' and 'Available Menu Tabs'. The 'Visible Menu Tabs' panel lists: My Trips, Dashboard, Converse, My Teams, Leads, Smart Views, Near Me, Activities, Tasks, and Notifications. The 'Available Menu Tabs' panel lists: Ace, Journeys, and Tickets. At the bottom right, there is a 'Check-In Customisations' button and a 'Converse - Chat' button.

leadsquared

HOME CONTENT MARKETING LEADS WORKFLOW APPS REPORTS ACE

Bengaluru

Publish

Bottom Navigation Side Navigation

Visible Menu Tabs

- My Trips
- Dashboard
- Converse
- My Teams
- Leads
- Smart Views
- Near Me
- Activities
- Tasks
- Notifications

Available Menu Tabs

- Ace
- Journeys
- Tickets

Check-In Customisations

Converse - Chat

# Add My Teams to your Home Page – Using Casa

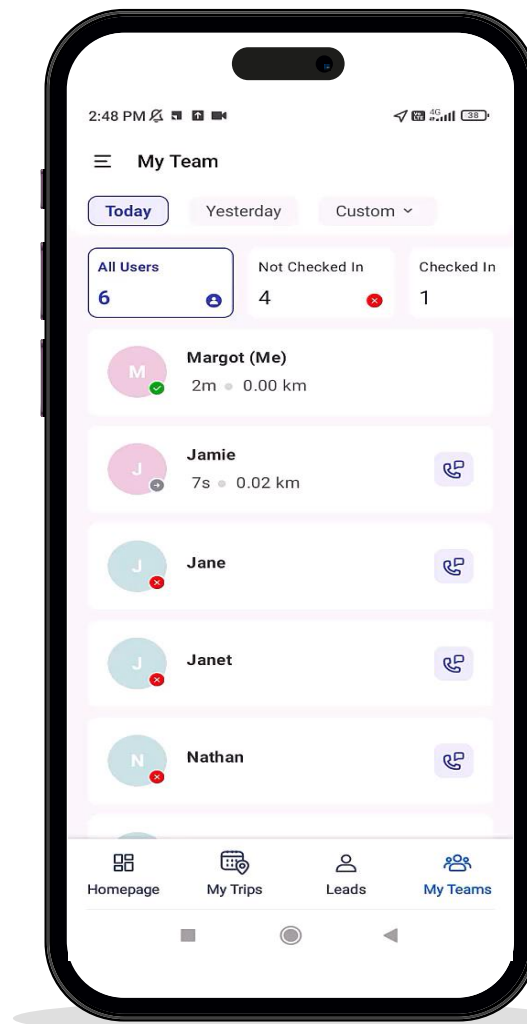
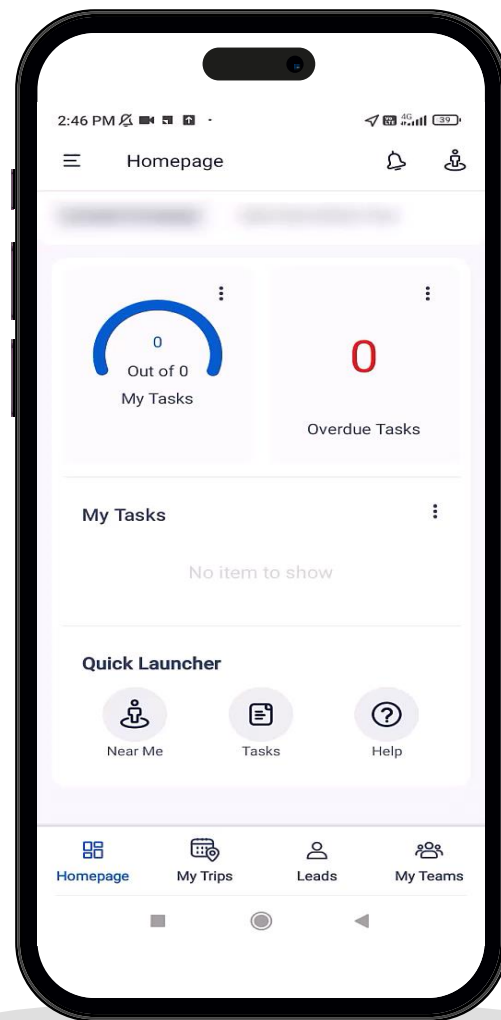
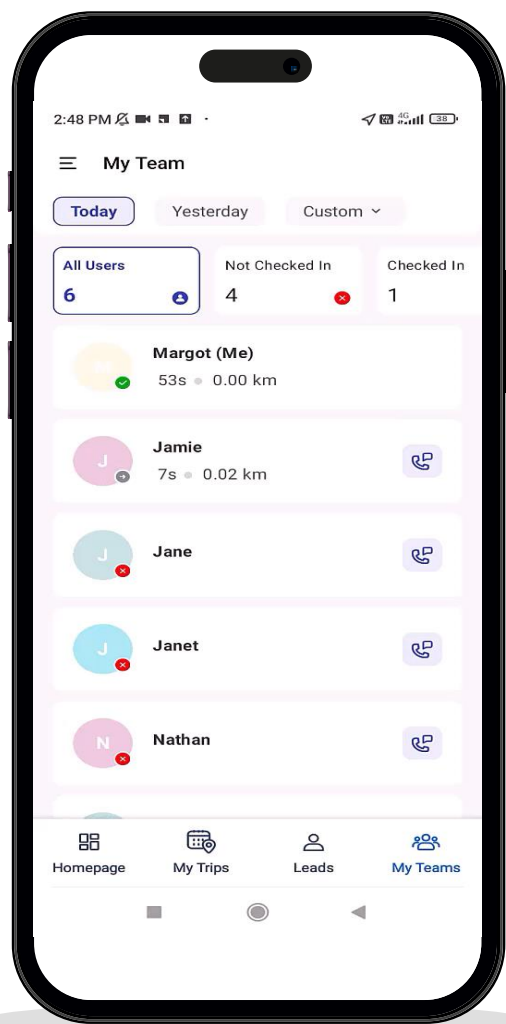
The screenshot displays the 'leadsquared' mobile application home page within a web-based editor. The interface is divided into several sections:

- Top Navigation Bar:** Includes the 'leadsquared' logo, a menu of tabs (HOME, CONTENT, MARKETING, LEADS, WORKFLOW, APPS, REPORTS, ACE), and utility icons for search, notifications, help, and user profile.
- Editor Header:** Features a back arrow, the text 'Home', an edit icon, and three action buttons: 'Templates', 'Saved', and 'Publish'.
- Mobile App Preview:** A central vertical rectangle shows a simulated mobile screen. It has a status bar at the top (15:46, signal, battery), a 'Home' header with a menu icon and notification/user icons, a large empty white box, and a button at the bottom labeled '+ Add New Section'.
- Widget Library (Right Panel):** A search bar is at the top. Below it are two main categories:
  - Task Counter:** Shows two circular gauges. The first is labeled '12 Out of 20 My Tasks' and the second is labeled '12 Overdue'. An '+ Add' button is below them.
  - Task List:** Displays a list of tasks under the heading 'Pending Tasks : 12'. The tasks are:
    - Demo Meeting by Vinay Kumar, due in 15 min (30 min total).
    - Demo Meeting at 08:30 AM (30 min total).
    - Follow Up Call by Vinay Kumar, dated 11 - 16 Apr 2022 (2hrs total).An '+ Add' button is at the bottom.

A mouse cursor is visible over the mobile app preview. At the bottom of the editor, a small yellow heart icon and a note state: 'Icons may or may not show up for the users based on the access controls'.

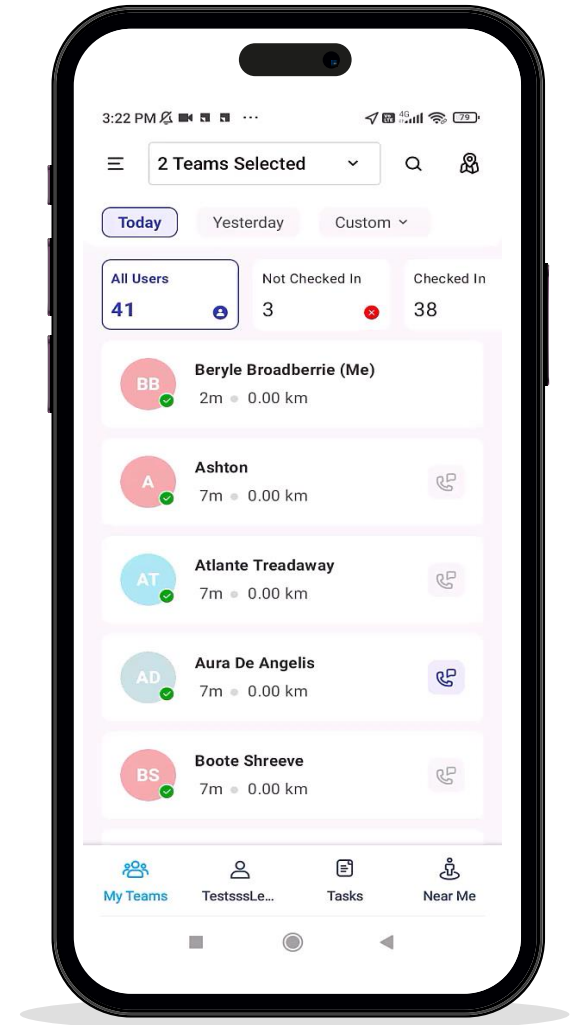


# Daily Ops at a Glance



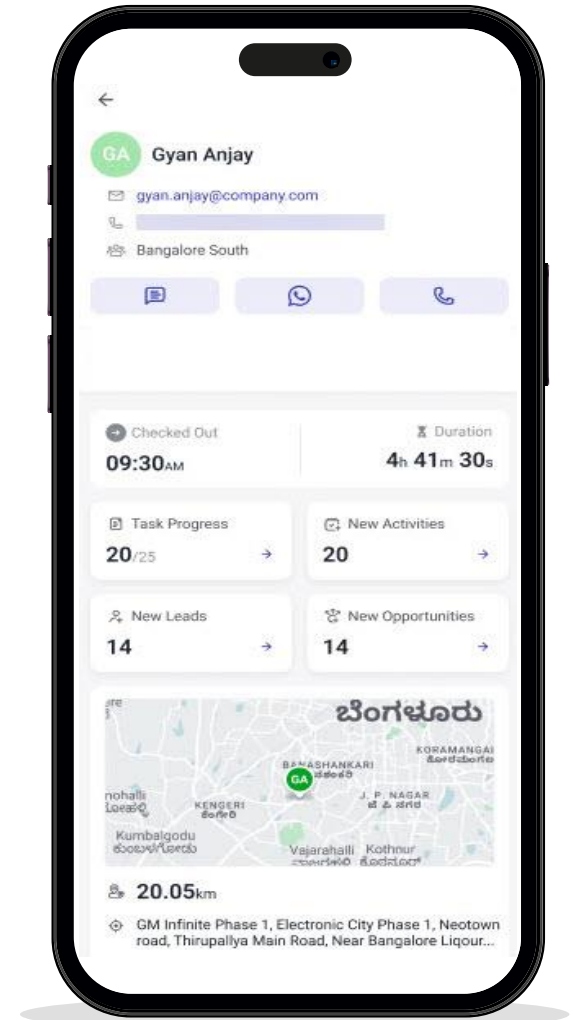
# Visualize Your Team in the Field

- Color-coded pins:
  - Green (Checked In)
  - Grey (Checked Out)
  - Dark Blue (You)
  - Blue (Selected)
- Scrollable user cards update map focus
- Navigate to user via Google Maps



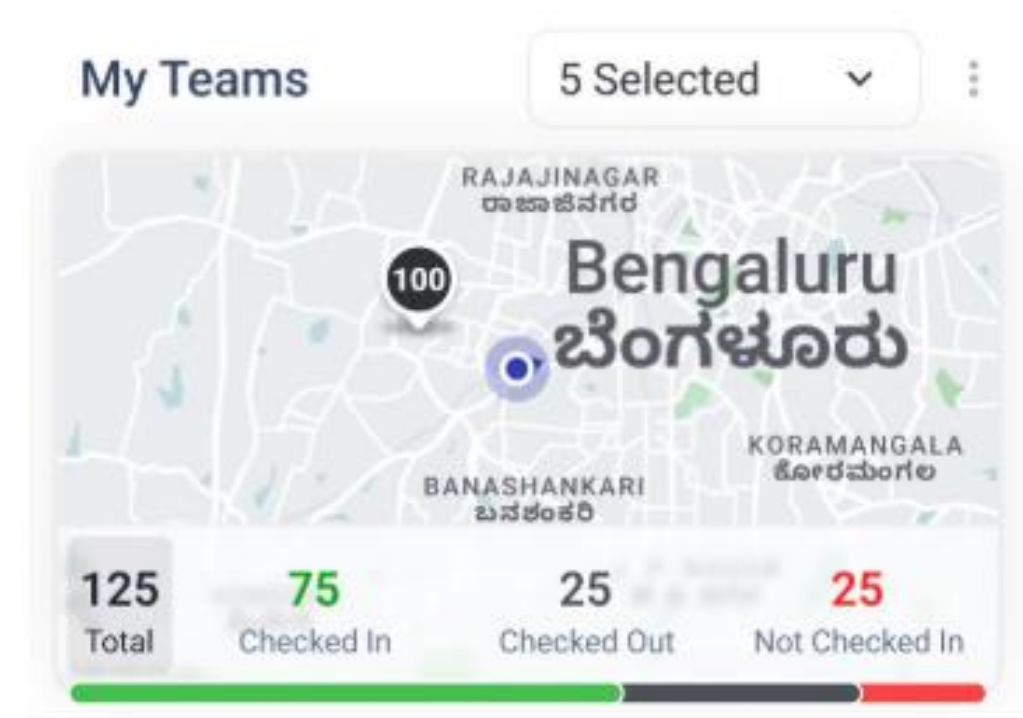
# Deep Dive into Individual User Performance

- Contact card with all available numbers
- Metrics:
  - Tasks completed
  - Leads
  - Opportunities
  - Activities
- Location: Current or last known, with timestamp



# What's Coming Next?

- Instant Visibility on App Launch
- Interactive Map View
- Quick Status Summary
- Smart Filters Built-In
- Seamless Navigation
- To enable My Teams,  
contact your account manager immediately.





# Poll Question – 4

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# Keep visiting

# [help.leadsguard.com](https://help.leadsguard.com)

# About LeadSquared

**2000+**

Clients

**10+**

Years of Operation

**1,000+**

Employees

**Secure**

GDPR, HIPPA & ISO 27001

**6 Countries**

India, USA, Australia, UK, South Africa,  
Middle East

**Gartner**

Recognized as a **Niche  
Player in Gartner  
Magic Quadrant 2024**



Financial Times  
**High Growth  
Companies 2023**



Deloitte  
**Technology Fast 50**  
(Multiple Years)



**G2 High  
Performer**  
(Multiple Years)

**NASSCOM**

**No.1 Marketing  
Automation  
Software**

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